VisionScaper User Manual

Version 2.51.0 · 474 articles in 10 chapters

Setup, every admin screen field by field, how to get every API key, the Designer, sales, operations, money, messaging and troubleshooting.

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Getting started & settings

Install VisionScaper, set up your business and learn every Settings tab.

What VisionScaper is

A plain-language overview of VisionScaper: the yard designer for homeowners and the Contractor Hub for your business.

VisionScaper is a WordPress plugin. It puts two tools on your website: a yard design studio for visitors, and a business tool for you and your crew.

The Designer (for homeowners)

A visitor starts from a photo of their own yard. They can take a photo with the camera, upload one, find their house from above (bird's-eye view), or open a ready-made sample yard. Then they:

- Place real plants and garden features at true size.
- Paint mulch, stone, lawn and pavers onto the ground.
- Draw garden beds and patios.
- Erase things they do not want.
- Switch seasons and slide a "See it grow" bar to watch plants mature.
- Save the design, share it, print it, or send it to you.

Designs save automatically on the visitor's own device. If they create a free account, designs also save online so they can open them on any phone or computer. Signed-in visitors can use the AI features, such as VisionScaper AI, Plant ID and the AI tools.

The Contractor Hub (for your business)

The Hub is for landscape contractors. According to the settings page it holds customers and properties, the 2D site plan, automatic takeoff and estimates, two quotes (a job-cost quote and a customer proposal), e-signature, email and text follow-ups, scheduling, job costing and invoices. The menu also lists marketing, field work, training, an AI Receptionist and more. Which tools you can use depends on your plan.

Homeowners use **Find a Local Contractor** and see the contractors they hire in **My Projects**.

Who does what

Person	What they use
Homeowner or visitor	The Designer page. No account needed to design.
Contractor (you, your managers, crew)	The Hub page, after signing in with an approved contractor account.
Website owner (WordPress administrator)	Settings → VisionScaper in WordPress, plus the other VisionScaper settings pages.

> Note: The website owner and the contractor are often the same person. The owner is always treated as approved.

Tips

- Start by reading [two-entry-points-designer-and-hub] to see how the two pages differ.
- Check [system-requirements] before you install.

If something goes wrong

If you are not sure which part of VisionScaper you are looking at, check the page address. The Designer lives on the page with `[visionscaper]`. The Hub lives on the page with `[visionscaper mode="hub"]`.

The two entry points: Designer and Contractor Hub

VisionScaper uses two pages on your site. One is the Designer for visitors, one is the Contractor Hub for contractors only.

VisionScaper has two separate front doors. You create one WordPress page for each.

Designer

- Shortcode: `[visionscaper]`
- Who: homeowners, designers, and anyone who wants to try a yard design.
- Launch card: a teal card with the label "Free yard design studio", the title "VisionScaper Designer" and a button that says "Start designing".
- No sign-in is needed to design. Signing in saves designs online and unlocks AI features.

Contractor Hub

- Shortcode: `[visionscaper mode="hub"]` (the shortcode `[visionscaper_hub]` does the same thing).
- Who: contractors only.
- Launch card: label "For landscape contractors", title "VisionScaper Contractor Hub", button "Open the Contractor Hub".
- Anyone can create an account from this page. A new contractor sends an application, and you approve it unless you switched on auto-approve. See [contractor-approval].
- The server, not only the screen, decides who can see Hub data. Someone who is not an approved contractor does not get it.

How the two connect

Approved contractors see a "Contractor Hub" link inside the Designer. Homeowners never do. When either page loads, VisionScaper remembers the page address so it can link between them.

Steps

1. Create a WordPress page for the Designer and add `[visionscaper]`.
2. Create a second page for the Hub and add `[visionscaper mode="hub"]`.
3. Visit each page and click its button to confirm the app opens.
4. Put links to both pages in your menu if you want visitors to find them.

Full details are in [add-the-shortcodes-and-pages].

Tips

- Give the Hub page a plain name such as "Contractor Hub". Do not put homeowners' links to it in your main menu unless you want contractors to find it easily.
- Any link to `#visionscaper`, or any element with the attribute `data-visionscaper-open`, opens the app on the page where the shortcode is.

If something goes wrong

- **The button does nothing.** The page must contain the shortcode. A hash link only works on a page that has it.
- **A contractor cannot get into the Hub.** Their application may still be pending. Check Settings → VisionScaper Contractors.
- **The Hub says contractor tools are off.** Turn them on in Settings → VisionScaper under Contractors.

System requirements

What your WordPress site needs before you install VisionScaper: versions, https, browsers and optional outside accounts.

Check these before you install.

What the plugin file says

Item	Requirement (from the plugin header)
WordPress	6.0 or newer ("Requires at least: 6.0")
PHP	7.4 or newer ("Requires PHP: 7.4")
License	GPLv2 or later

The readme lists WordPress 6.8 as the newest version it names as tested (not verified by us).

Your site

- **Use https.** The live camera only works when the page loads over https. If the camera is unavailable, the app falls back to the phone's photo picker.
- **Use a normal WordPress install** where you can upload a plugin zip (Plugins → Add New → Upload Plugin).
- **Scheduled tasks must run.** Follow-ups, reminders and other sends use WP-Cron. See [wp-cron-backups-and-updates].
- **Outgoing email.** Notifications use your site's mail. If your site cannot send mail, install an SMTP plugin. (Marketing sending has a setting for "This website's own mail (your SMTP plugin)".)
- **Caching and minify plugins** need two exclusions. See [caching-and-minify-exclusions].

Visitors' browsers

The app is built from JavaScript modules, so visitors need a current browser. Voice search works in Chrome, Edge and Safari according to the readme. Designs are kept in the visitor's browser storage, so clearing browser data deletes designs that are not saved to an account.

Optional outside accounts

None of these are needed to install. Add them only for the feature you want. Follow each provider's current sign-up instructions.

Feature	Account	VisionScaper field
Address autocomplete from Google, "Explore in 3D"	Google Maps API key	Google Maps API key (optional)
Sign in with Google or Facebook	Google Cloud, Meta for Developers	Client ID and secret fields
VisionScaper AI	Black Forest Labs	Black Forest Labs API key
Smart Select and item identification	fal.ai	fal.ai API key
Plant and weed identification	Pl@ntNet	Pl@ntNet API key
Selling credits, contractor payments, subscriptions	Stripe	Stripe secret key and webhook secret
Text messages	Twilio	Twilio fields

Tips

- Pick a host that lets you raise the PHP version if yours is below 7.4.
- Back up your site before you install. See [wp-cron-backups-and-updates].

If something goes wrong

If WordPress will not activate the plugin, check the PHP version first. It is the most common cause.

Install and activate the plugin

Upload the VisionScaper zip in WordPress, activate it, and confirm the Settings link appears.

Before you start

- Make a backup of your site. See [wp-cron-backups-and-updates].
- Check [system-requirements].
- Have the plugin zip file ready. The readme names it `dreamscaper.zip`. Your file may carry a version number in its name.

Steps

1. In WordPress, go to **Plugins → Add New → Upload Plugin**.
2. Choose the VisionScaper zip file and click **Install Now**.
3. Click **Activate**.
4. Go to **Plugins → Installed Plugins**. Under VisionScaper you should see a **Settings** link. It opens **Settings → VisionScaper**.
5. Open **Settings → VisionScaper** and fill in the basics. See [wordpress-settings-basics].
6. Create your Designer and Hub pages. See [add-the-shortcodes-and-pages].

What activation sets up

- New database tables are created automatically when the plugin loads or upgrades (the changelog says this for version 2.42.0). You do not run anything yourself.
- Scheduled tasks register themselves. The main one runs every 5 minutes. See [wp-cron-backups-and-updates].
- Several new pages appear under **Settings** in the WordPress menu:
- VisionScaper
- VisionScaper Community
- VisionScaper Contractors (with a count of pending applications)
- VisionScaper Plans
- VisionScaper Entitlements
- VisionScaper Appearance
- VisionScaper Messaging
- VisionScaper Marketing
- VisionScaper AI Receptionist
- VisionScaper Terms
- VisionScaper Records

Tips

- Install over an older version to upgrade. Do not delete the old one first.
- Optional photo and material packs are uploaded later, from the Library packs area on the VisionScaper settings page.

If something goes wrong

- **"Plugin could not be activated".** Check your PHP and WordPress versions.
- **Upload fails because the file is too large.** Ask your host to raise the upload limit, or upload the zip by FTP into `wp-content/plugins` and unzip it there.
- **You do not see the Settings pages.** Only administrators (users who can manage options) see them.

Add the shortcodes and create your pages

Create a Designer page and a Contractor Hub page, and learn the shortcode options and the link tricks that open the app.

A shortcode is a small tag you type into a WordPress page. VisionScaper turns it into a launch card with a button.

Steps

1. In WordPress, go to **Pages → Add New**.
2. Title it, for example, "Try the Designer".
3. Add a **Shortcode** block (or paste into the text editor) and type `[visionscaper]`.
4. Publish the page.
5. Make a second page, for example "Contractor Hub", with `[visionscaper mode="hub"]`. Publish it.
6. View each page. You should see a teal launch card with a button.
7. Click the button. The full-screen app opens.

Shortcode options

Shortcode	What it does
`[visionscaper]`	The Designer launch card.
`[visionscaper mode="hub"]`	The Contractor Hub launch card.
`[visionscaper_hub]`	Same as mode="hub".
`[dreamscaper]`	An older tag that still works and shows the Designer.

You can change the words on the card:

```
[visionscaper title="My Yard Studio" text="Design your yard on a photo." button="Start designing"]
```

- `title` is the heading.
- `text` is the paragraph under it.
- `button` is the button label. VisionScaper adds an arrow after it.

If you leave these out, VisionScaper uses its own wording for the Designer or the Hub.

Other ways to open the app

- A link to `#visionscaper` opens it.
- Any element with the attribute `data-visionscaper-open` opens it when clicked.
- Both only work on a page that contains the shortcode.

Other shortcodes

The plugin also registers `[dreamscaper_quote]`, `[dreamscaper_request]`, `[dreamscaper_chat]` and `[dreamscaper_terms]`. Their set-up is covered in other areas of this manual (not verified here).

Tips

- Use one launch card per page. The app loads its code once per page.
- When a page with a shortcode is viewed, VisionScaper remembers it as your Designer or Hub page and uses it for internal links.
- Put the Hub page where contractors will look, such as a footer link.

If something goes wrong

- **The page shows the raw shortcode text.** Use a Shortcode block, not a code block.
- **The button does nothing.** A caching or minify plugin may be breaking the scripts. See [caching-and-minify-exclusions].
- **Camera does not start.** The page must be on https.

WordPress settings: business name, email and region

The Basics section of Settings → VisionScaper: business name, short name, website, home region and where designs and leads are emailed.

Open **Settings → VisionScaper** in WordPress. The first section is **Basics**.

Steps

1. Fill in **Business name**. This is the brand shown in the app. It is also the name used for your sign-in apps.
2. **Home region (for plant advice)**: type a state, such as "Connecticut". It is used for visitors who have not said where they are. Everyone else gets advice for their own state. VisionScaper works anywhere in the US.
3. **Short name (for "Send to …" button)**: a short version of your name. It appears on the button where customers send you a design.
4. **Website shown on saved images**: your web address, shown on pictures customers save.
5. **Send designs and leads to**: the email address that receives designs, leads and notices. Use an inbox you check.
6. Under **Emails to you**, tick what you want: - **Let customers send their finished design to you ("Send to …")** - **Email me every VisionScaper AI design (before/after + customer details)**. The label on the screen may still show an older product name. - **Email me when someone creates an account**
7. Click **Save Changes** at the bottom.

What each field does

Field	Effect
Business name	Brand text in the app and on sign-in screens.
Home region	Default state for plant advice.
Short name	Wording on the send-to-you button.
Website shown on saved images	Added to saved pictures.
Send designs and leads to	Where emails go. If blank, notices may not reach you.

Tips

- Use a real, monitored email. Designs and leads arrive there.
- If you turn off "Let customers send their finished design to you", visitors can still save and print designs, but not send them.
- Secret fields on this page show dots after you save. Leaving dots in place keeps the saved value. Replace the dots to change it.

If something goes wrong

- **Emails never arrive.** Check spam. Then check that your WordPress site can send mail (an SMTP plugin often fixes this).
- **Saved changes vanish.** Make sure you clicked Save Changes at the bottom of the page.

WordPress settings: maps, routing and imagery

Add Google Maps keys, an optional OSRM server, door-to-door map tiles and bird's-eye imagery settings.

All fields here are optional. VisionScaper works without them, using free map data.

Google Maps API key (optional)

On **Settings → VisionScaper**, find **Google Maps API key (optional)**.

- It turns on address autocomplete powered by Google. Enable **Places API (New)** for that.
- It turns on "Explore in 3D". Enable **Maps JavaScript API** for that.
- Restrict the key to your website.
- Without a key, addresses autocomplete from OpenStreetMap.

Follow Google's current instructions to create the key, then paste it in. Saved keys show as dots.

Google server key for the Route planner (optional)

- Field: **Google server key for the Route planner (optional)**.
- Used for driving distances (**Routes API**) and nearby restaurants and gas prices (**Places API (New)**). These are looked up from your server.
- Use a key restricted to your server's IP address. If empty, the key above is used.

OSRM routing server (optional)

- Field: **OSRM routing server (optional)**.
- Without a Google key, driving distances can come from an OSRM server you host, for example `https://osrm.example.com`. Only a web address starting with https:// is accepted.
- With neither, the planner estimates road miles from straight-line distance.

Door-to-door map

Contractors tap houses on a street map to log visits. By default it uses OpenStreetMap, which is fine for light use. For heavy use or satellite imagery, sign up with a map tile provider and paste its address:

1. **Map tile address (optional)**: must contain `{z}`, `{x}` and `{y}`.
2. **Map credit line**: shown on the map, as your provider requires.
3. **Deepest zoom level**: usually 19 to 20.

Bird's-eye imagery outside Connecticut

Connecticut addresses always use the state's 3-inch imagery. Everywhere else uses an ArcGIS image service. The default is USGS NAIP, public domain, about 2 ft per pixel. Fields:

- **Image service address**
- **Imagery credit line**
- **Imagery resolution (feet per pixel)**: used to tell contractors how precise traced edges are.

At 2 ft per pixel, small features should be measured with a tape in the Landscape Plan wizard.

Tips

- Start with no keys. Add one only when you need the feature.
- Keep keys restricted. An open key can be used by others.

If something goes wrong

- **Autocomplete still looks like OpenStreetMap.** The key may be missing, mistyped or not authorized for the right Google service.
- **Explore in 3D is missing.** Enable Maps JavaScript API for the key.
- **Tiles do not load.** The address must include all three placeholders.

Accounts and sign-in: email, Google and Facebook

How customers and contractors create accounts, and how to turn on Continue with Google and Continue with Facebook.

Anyone can design without an account. Their designs stay on their device. Signing in saves designs online and unlocks AI features. Customer accounts are normal WordPress Subscriber accounts (see the Users menu). They never see wp-admin.

What visitors see

The sign-in window has two tabs, **Create account** and **Sign in**.

- **Create account** asks for full name, email, phone, the street address of the yard (on the Designer), password (at least 8 characters), and a tick box to agree to the Terms of Service.
- **Sign in** asks for email and password. **Forgot password?** sends a reset.
- On the Contractor Hub page the button reads **Create my contractor account** and no yard address is asked.
- Buttons **Continue with Google** and **Continue with Facebook** appear only after you add their keys.

New accounts can trigger an email to you if **Email me when someone creates an account** is ticked.

Online storage per customer

Field **Online storage per customer (MB)** under Customer accounts. Photos are compressed. A typical design uses 1 to 4 MB. The code accepts 20 to 5000 MB.

Turn on Sign in with Google

1. Follow the steps shown on **Settings → VisionScaper** under Sign in with Google. They point to Google Cloud, APIs & Services, Credentials.
2. On the consent screen, choose External, enter your app name, email and privacy policy address, and publish.
3. Create an OAuth client ID of type Web application.
4. Under Authorized redirect URIs, add the address VisionScaper shows you on the settings page (it ends with `?dreamscaper_oauth=google`).
5. Paste **Google Client ID** and **Google Client secret** into VisionScaper and save.

Turn on Sign in with Facebook

1. Follow the steps on the settings page under Sign in with Facebook (Meta for Developers, use case "Authenticate and request data from users with Facebook Login").
2. Add the address VisionScaper shows (ending `?dreamscaper_oauth=facebook`) to **Valid OAuth Redirect URIs**.
3. Add a privacy policy address and a data-deletion instructions address. VisionScaper suggests saying customers can delete their account in My account → Delete account.
4. Switch the app to Live.
5. Paste **Facebook App ID** and **Facebook App secret** and save.

Provider screens change. Follow their current instructions.

Tips

- Copy the redirect address exactly from your settings page. Do not retype it.
- Leave a key field as dots to keep the saved value.
- Too many sign-up or login attempts from one place are slowed down, by design.

If something goes wrong

- **No Google button.** The Client ID or secret is empty.
- **"That email already has an account".** Use Sign in or Forgot password.
- **Redirect error from Google or Facebook.** The redirect address in their console does not match yours.

AI keys and daily limits

Where to paste the Black Forest Labs, fal.ai and Pl@ntNet keys, and how the per-customer daily AI limit works.

AI features work only for signed-in customers. Signed-out visitors see them greyed out with a "Sign in to use AI" prompt. Each AI service needs its own key, which you paste into **Settings → VisionScaper**, section **AI**.

Keys

Field	What it powers
Black Forest Labs API key	VisionScaper AI image design and the AI Erase, Make it real and Season & Light tools.
BFL model	Leave as `flux-2-klein-4b`.
fal.ai API key	AI Smart Select and identifying garden items and materials.
Vision model (fal any-llm)	Default `google/gemini-2.5-flash`.
Pl@ntNet API key	Plant and weed identification.

Get each key from the provider's own dashboard. Follow their current instructions and add credits where they require it. Costs mentioned on the settings page are provider estimates and can change.

Daily limit

- **AI image generations per customer per day**: every AI design, tweak and AI-tool edit uses one. Smart Select and Identify are free.
- **No daily limit for site administrators (for testing)**: ticked by default. Untick it to test as a normal customer.

Phone app AI switches

In the **Mobile app** section:

- **Voice-note summaries**: lets the phone app summarize dictated notes. Uses your fal.ai key. Off until you switch it on. A person accepts every suggestion.
- **Estimate from a recorded walk**: lets the phone app turn a dictated property walk into a DRAFT quote. Uses your fal.ai key. Only typed or dictated text goes out, with emails and phone numbers removed. The AI only picks from your own services and measured areas. Prices come from your rates.

Steps

1. Open Settings → VisionScaper → AI.
2. Paste the key you need.
3. Set the daily limit.
4. Save Changes.
5. Sign in as a customer (not admin) and try one AI action.

Tips

- Add keys one at a time and test each.
- Contractors have their own monthly AI credits tied to their plan. See [plans-billing-credits-and-usage].

If something goes wrong

- **"Sign in to use AI" shows when signed in.** The AI key may be empty.
- **AI stops mid-day.** The customer hit the daily limit. They can wait or buy credits if you enabled the shop.
- **Provider errors.** Check your balance and key on the provider's site.

Selling extra AI credits and storage

Connect Stripe, set the webhook, and define credit packs and storage packs your customers can buy.

Customers get free daily AI credits and free online storage. When those run out, they can buy more on Stripe's checkout page (card, Apple Pay or Google Pay). Purchased credits never expire and are used after the free ones.

> Warning: All prices in the default packs are unapproved placeholders. Set your own before you turn the shop on.

Set up Stripe

1. Create a Stripe account and finish its business details, following Stripe's current instructions.
2. In Stripe, find your API **Secret key**. Use a test key to practice and a live key to sell.
3. In Stripe, add a webhook endpoint pointing to the address shown on your settings page (it ends with `/wp-json/dreamscaper/v1/stripe`). Send the event `checkout.session.completed`.
4. Copy the webhook **Signing secret**.
5. In Settings → VisionScaper → **Selling extra AI credits**, paste the **Stripe secret key** and the **Stripe webhook signing secret**.
6. Tick **Let customers buy extra AI credits**. Optionally tick **Email me about each purchase**.

The settings page says credits are also confirmed when the customer returns to your site, so a missed webhook should not lose a purchase.

Credit packs

- Field **Credit packs**: one pack per line in this form: `Name | credits | price in dollars`.
- The settings page says up to 4 packs look best.
- **Price per single credit ($)**: for a custom amount. Set 0 to sell packs only.
- **Minimum custom purchase (credits)**.

Storage packs

Under **Selling extra library storage**:

1. Tick **Let customers buy extra storage**.
2. Edit **Storage packs**, one per line: `Name | megabytes | price in dollars`. 1 GB equals 1024 MB.

Storage is one time and never expires. It is added when Stripe confirms payment. The page notes a Plant ID plant uses about 0.2 to 0.5 MB, and a design about 1 to 4 MB.

Recent purchases

A **Recent purchases** table at the bottom of the settings page lists date, customer, email, what was bought and the amount paid.

Tips

- Test in Stripe test mode first.
- This same Stripe account is used for contractor subscriptions and payments. See [contractor-tools-text-and-payments].

If something goes wrong

- **Customer paid but has no credits.** Check the webhook address and signing secret. Have the customer reload.
- **A pack line is ignored.** Check the three parts are separated by the bar character.
- **The Buy button is missing.** The shop checkbox is off, or the Stripe secret key is empty.

Community, points and rewards settings

Turn the member community on, set moderation, and tune the points members earn and the rewards they can redeem.

The community lets members post finished designs and "ask for ideas" photos. They can like, rate, comment, follow, friend and message each other, and earn points and badges. In the app it is called the VisionScaper Browser.

Turn it on

In **Settings → VisionScaper → Community**, tick what you want:

- **Turn on the community, points and rewards**
- **Email members about new messages and comments** (members can turn this off)
- **Check posted pictures with AI before they go live**. This uses your fal.ai key.
- **Email me about every new community post**

Then set **Hide a post after this many reports**. A hidden post stays hidden until you review it.

Posts go live immediately. Anything reported by several members is hidden.

Review reported posts

Go to **Settings → VisionScaper Community**. The page has:

- **Needs review**: What, Member, Reports, Reasons, Status, Action. Buttons include "Keep (it's fine)" and "Ban member".
- **Latest posts**: Post, Member, Likes, Rating, Comments, Status.
- **Members**: Member, Level, Points (balance / lifetime), Status.

Points

The **Points** table lets you set how many points each action earns. Actions on the page:

Daily visit, first design, each new design, sharing to the community, each like received, each comment, answering an "ask for ideas" post, first Plant ID, each Plant ID, sharing to social media, adding a profile photo and bio, first AI design, each 4 to 5 star rating received, and each new follower. Several have daily caps shown on the page.

> Warning: The point values shipped as defaults are placeholders, not approved. Choose values that fit your business.

Rewards

Under **Rewards**:

- **Points for 1 AI credit**
- **Points for extra storage**
- **...which gives this many MB**

Members trade points for AI credits or storage.

Tips

- Watch the Needs review list weekly.
- Higher rewards cost you real money when each AI credit has a provider cost.
- Remind members not to post house numbers or private details. The in-app guide says so.

If something goes wrong

- **No community menu in the app.** The master checkbox is off.
- **You get too many emails.** Untick Email me about every new community post.
- **A member cannot redeem.** They may not have enough points for the cost you set.

Contractor tools, texting and payments settings

The Contractors section of Settings → VisionScaper: turn on the Hub, add Twilio for texts, set Stripe Connect options and push notifications.

These sit on **Settings → VisionScaper**, in the Contractors (CRM) section and below.

Turn the Hub on

- **Turn on the Contractor Hub, Find a Local Contractor and My Projects.** Ticked by default.
- **Approve contractor applications automatically (not recommended).** Off by default. See [contractor-approval].

Text messages (Twilio)

1. Create a Twilio account and buy a local number with SMS (follow Twilio's current instructions).
2. US texting requires A2P 10DLC registration. The settings page says texts are blocked by carriers until it is approved.
3. Optional: create a Messaging Service and note its SID.
4. On the number (or Messaging Service), set the incoming message webhook to the HTTP POST address shown on your settings page (it ends `/wp-json/dreamscaper/v1/crm/twilio`).
5. Paste into VisionScaper: **Twilio Account SID** (starts with AC), **Twilio Auth Token**, **Twilio phone number** (like +18605550100, not needed with a Messaging Service), and **Messaging Service SID (optional)** (starts with MG).

Customer replies are logged and emailed to the contractor. Texts from unknown numbers become leads. STOP is honored.

Contractor payments (Stripe Connect)

Contractors connect their own Stripe account from the Hub. See [settings-get-paid-online]. On your side:

1. Use the Stripe keys from [selling-credits-and-storage].
2. In Stripe, turn on Connect (Express accounts).
3. Add the events the readme lists: `checkout.session.completed`, `checkout.session.async_payment_succeeded`, `checkout.session.async_payment_failed` and `account.updated`.
4. Set the processing rates (all placeholders, not approved): **Card payments - % per payment**, **Card payments - fixed $ per payment**, **Bank (ACH) payments - % per payment**, **Instant Payouts - % of the payout**.
5. Tick **Let customers pay by bank account (ACH)** and/or **Offer contractors Instant Payouts**. Before Instant Payouts, enable it and Account Debits (US) in Stripe's Connect settings and test first.

Mobile app and other switches

- **Expo access token (optional)**: only if "enhanced push security" is on in your Expo project.
- **Automatic payments (autopay)**: lets customers save a card or bank account and invoices marked autopay charge it on the due date. Off until you switch it on. Stripe fees apply.

Tips

- Use Stripe test mode before going live.
- A text from a customer does not need setup on their side.

If something goes wrong

- **Texts do not send.** A2P approval or the Twilio fields are incomplete.
- **Replies do not appear.** Check the webhook address.
- **Payments fail to confirm.** Check the four Connect events are added.

First-run guide, sample data and tutorial

Use the six-step Get started guide in the Hub, try sample data, and open the designer tutorial and step bar.

The Get started guide (Contractor Hub)

New contractor businesses see a **Get started** card on Today with a progress bar, the next step and a **Continue** button. **Hide for now** hides it. You can also open it from **Settings → Business profile → Open the Get started guide**.

There are six steps, each with its own button:

Step	Why	Button
Your business	Customers see this name, phone and email on every quote and invoice.	Save my business
Your labor rate and markups	Quotes are priced from these.	Save my rates
Your first service	A service is something you sell, with a price.	Add this service
Your first customer	Quotes, visits and invoices hang off a customer.	Add this customer
Your first quote	A quote is a customer and a service with a price. It stays a draft until you send it.	Make the quote
A test quote to yourself	Shows what the customer will see. It goes to your own email only.	Email it to me

Each step shows Done, Skipped or To do.

Try with sample data

On the guide, **Try with sample data** adds clearly labeled [Sample] customers, quotes, visits, invoices and tasks. Nothing is sent to them. A banner on Today reads "You are looking at sample data."

To remove it: **Remove all sample data**, then **Yes, remove the sample data**. It removes only what sample data made. If you attached something real to a sample record, that record is kept and becomes yours.

The designer tutorial

In the Designer, open **How VisionScaper works**. It has 15 topics with Back and Next buttons: What is VisionScaper, the 4 simple steps, getting a great photo, scale and perspective, adding plants, mulch/stone/lawn/beds, erasing, history and undo, seasons and growth, VisionScaper AI, AI tools, Plant ID, saving and sharing, the community and rewards, and tips.

In the editor, a **step-by-step guide bar** shows five steps: Set the scale, Add plants, Add mulch/stone or a bed, Watch it grow, Save/share/send. Buttons: **Show me**, **Next step**, a **?** for help and a close button. You can bring it back with the **?** button.

Steps

1. Open the Hub and find the Get started card on Today.
2. Click Continue and finish each step, or skip.
3. Try sample data if you want a safe look around.
4. Remove sample data before you enter real customers.

Tips

- Do the business step first. It feeds quotes and invoices.
- Send the test quote to yourself before a real customer.

If something goes wrong

- **No Get started card.** It shows for businesses created after the guide existed, or you hid it. Use Settings.
- **Test email did not arrive.** Check spam and your site's mail setup.

Hub Settings: the five groups, 17 tabs and the search box

How Contractor Hub Settings is organized, which tab holds what, and how to jump to any setting by name.

Open the Hub, then **Settings & Integrations → Business settings**. Settings has five groups. Each group has tabs.

The groups and tabs

Group	Tabs
Business	Business profile · Appearance & layout · Social & gallery · Services · Show me & tools
Prices and quotes	Costs & markups · Price book · Terms & payments · Follow-up plan
Money	Invoice design · Get paid online
Team	Crew, team & hours
Messages and connections	Messages & alerts · Reminders · Intake questions · Quick replies · Connected apps

Click a group button to open its first tab. When a group has more than one tab, a second row of tabs appears.

> Note: Some Hub menu items open a settings tab directly. For example "Pricing" opens Costs & markups, and "Payments setup" opens Get paid online.

Search settings

At the top of Settings is a search box with the hint "Search settings: try "tax", "logo", "deposit"...".

1. Click the box and type a word, at least two letters.
2. A list appears. Each result shows the setting name and where it lives, such as "Prices and quotes › Costs & markups".
3. Click a result, or press **Enter** to take the first one. **Esc** clears the box.
4. VisionScaper opens that tab, scrolls to the setting and highlights it for about three seconds.

Search matches the setting name, extra words people type (for example "wage" finds Labor cost per hour), the tab name and the group name. It forgives a one-letter typo in words of four letters or more. Older names still work. For example "Integrations" finds Connected apps, and "Verifier token" finds Security key.

If nothing matches you see "No setting has that name. Try another word."

Examples of what search finds

Type	Finds
tax	Sales tax, Tax applies to, Default sales tax
deposit	Deposit when signed
logo	Logo position, Logo size, Your brand colors
texting	Text messages
webhook	Security key

Tips

- Search is the fastest route. Use it before you hunt through tabs.
- Each tab saves on its own. Look for its Save button.

If something goes wrong

- **Search finds nothing.** Try a different word, such as "markup" instead of "profit".
- **A tab seems empty.** It may still be loading. Wait a moment.
- **A button is missing.** Your plan may not include that tool. Locked items show a note.

Settings: Business profile

Fill in the Business profile tab: name, contact details, license, service area, services and logo.

Path: **Settings → Business → Business profile**. This is the same form a new contractor fills in to apply. Once approved, the button reads **Save business profile**.

Fields

Field	Notes
Logo	Click **Logo** to upload an image. It is resized to fit.
Business name *	Required.
Your name	Your contact name.
Business phone *	Required.
Business email *	Required.
Website	Start with https://.
Years in business	Number.
License # (state contractor / HIC registration)	For example HIC.0123456 or your state license number.
We carry general liability insurance	Check box.
Street, Town *, State, ZIP	Where you work. The street field offers address suggestions.
Service radius (miles)	From 5 to 200.
Services	Tap to select: Landscape design, Planting, Mulch & stone, Lawn installation, Patios & walkways, Retaining walls, Landscape lighting, Fencing, Drainage & grading, Tree work, Lawn care, Irrigation, Snow removal, Outdoor kitchens, Water features.
About your business	A few lines on what you do best.

Steps

1. Open Business profile.
2. Upload your logo.
3. Fill in the required fields (marked with *).
4. Enter your license number and tick insurance if it applies. The site owner checks these when approving applications.
5. Choose your services and radius.
6. Click **Save business profile**.

Applying for the first time

New applicants must also tick two boxes: agree to the Terms of Service, and confirm they understand that customer payment and scheduling records and employee references are shared only between approved contractors and must stay confidential. The button reads **Apply to be a VisionScaper contractor**. After you apply you see "Your application is being reviewed" until it is approved. See [contractor-approval].

Tips

- Your logo and license line feed other places such as invoices.
- Keep the service radius honest. It affects who finds you.

If something goes wrong

- **"Please tick both boxes to apply."** Tick both agreement boxes.
- **Save fails.** A required field is empty.
- **You cannot open Settings.** Your application may still be pending.

Settings: Appearance & layout

Change colors, fonts, spacing and screen layout for yourself, your business or the whole site, with readability checks, undo and history.

Path: **Settings → Business → Appearance & layout**.

Who the change applies to

At the top, **Change the look for** offers up to three choices:

- **Just me**: only you, on every device you sign in on.
- **My business**: your Hub, and optionally the pages your customers see. Shown to contractors.
- **Whole site**: everyone. Shown to the site owner. The owner can lock settings and set default layouts per role.

Tabs

Look · Colors · Text · Shape & spacing · Layout · History · Site controls (site owner only).

Look holds:

- **Light, dark or high contrast** (including "Match my device").
- **Ready-made looks**, such as Dark, High contrast, Earth tones, Premium slate, Ocean, Sunrise, Clean & classic, Compact, Comfortable and Spacious.
- **Your brand colors**: Brand / primary, Secondary, Main call to action, and **Background tint**.
- **Describe it - AI theme**: type a description and click **Create it**. The AI only picks from approved colors, fonts and safe sizes.
- **Your customers' pages** (My business only): carries your brand color to proposals and invoices. Your internal layout never changes what customers see.

Text and **Shape & spacing** cover fonts, sizes, corners, shadows, density, icons and motion. **Layout** lets you reorder, hide, show or pin pieces of each screen. Required items (Settings, Plan, Help, Account) can move but never disappear.

Readability checks

VisionScaper checks every color. A status line says "Passes readability checks" or shows how many colors were adjusted. If a color would be hard to read, it is nudged and you are told. You cannot save while a readability problem exists.

Steps

1. Pick who the change is for.
2. Choose a ready-made look or set your brand colors.
3. Click **Preview on devices** to check it.
4. For Just me, click **Save my look**. For business or site, click **Save draft**, then **Review & publish**.
5. To go back, use **Undo**, **Redo**, **Reset to inherited look**, or the History tab.

History keeps published versions and up to 10 saved themes.

Tips

- Drafts are visible only to you until published.
- Changes preview live before you save.

If something goes wrong

- **A color is locked.** The site owner locked it. You will see a lock note.
- **Publish is disabled.** Fix the readability problems first.

Settings: Social & gallery and Services

Add your social and review links, upload a work gallery, and find where your reusable service templates live.

Social & gallery

Path: **Settings → Business → Social & gallery**.

Social links

Networks listed in the settings search: Facebook, Instagram, Google Business Profile, Houzz, YouTube, Nextdoor, TikTok and LinkedIn. The tab itself shows the list your site provides.

1. Paste a link, or just your @name where the field allows.
2. Use the **Show** switch to hide any link everywhere at once. It stays saved.
3. Click **Test** to open the link (save first).
4. Check **How homeowners will see them**.
5. Click **Save social links**.

Links show on your contractor page, your Find a Contractor card, proposals and invoices. The card shows the first three. The tab says every plan includes every network. A tip suggests starting with your Google Business Profile.

Work gallery

- Heading **Work gallery**: your best finished work, shown on your contractor page. Up to 60 photos.
- Click **Add a photo** and pick an image. It is resized before upload.
- Click the small close icon on a photo to remove it.
- If the gallery is not in your plan, you see a lock note instead.

Services

Path: **Settings → Business → Services**.

This tab shows a card **Service templates** with one button, **Open Services**. Your reusable services live in their own area: defaults for price, duration, crew, scope, materials, checklist, messages and automations, with version history and job profit.

Steps

1. Open Social & gallery.
2. Paste your Google Business Profile link first.
3. Add the other links you use.
4. Save social links.
5. Add a few gallery photos.
6. Open Services and review your templates.

Tips

- Use real links only. Switch off networks you do not maintain.
- Pick bright, well lit photos.

If something goes wrong

- **A link is rejected.** The tab shows the problem under that field. Paste the full link.
- **No photos can be added.** Your plan may not include the gallery.

Settings: Show me & tools (Simple or Full)

Choose Simple or Full, and switch ten advanced tools on or off without deleting anything.

Path: **Settings → Business → Show me & tools**.

This tab only changes what is shown. It never deletes or changes your information. Turn a tool back on and everything returns.

Show me

Two choices:

- **Simple**: hides the advanced tools until you turn them on.
- **Full**: shows every tool.

A business that existed before this feature (version 2.26.0) is Full. A business created after is Simple. Your choice is stored once you pick.

Turn on more tools

Each tool has a switch.

Tool	What it does
Payroll export	Download approved hours as a file for payroll.
Overhead budget	Plan yearly overhead and see what each labor hour must cover.
Materials & purchases	Order materials, email vendors and receive deliveries.
Team location	See who is clocked in and where they were last seen.
Door-to-door	Log every house you knock on, on a map.
Landscape plans	Measured 2D plans you can share.
Route planner	Put the day's stops in the best order.
Equipment	Maintenance reminders for every machine.
AI Receptionist	An AI that answers your phone and books visits.
AI marketing	AI finds who to contact and writes the message.

Each switch shows or hides that tool's menu item and Today pieces. A link to a hidden tool still opens it, with a notice.

Steps

1. Open Show me & tools.
2. Click Simple or Full.
3. Flip any switch you want. A message confirms, for example "Route planner is on."

Tips

- Start Simple. Add tools when you need them.
- Hiding does not stop scheduled jobs or data.
- Tools can still be limited by your plan.

If something goes wrong

- **Update message.** If the tab says to update the VisionScaper plugin, the site's plugin is older than this feature.
- **A menu item is still missing.** Your plan or your role's permissions may hide it.

Settings: Costs & markups

Enter your labor cost, overhead, markups or target margin, sales tax, deposit and quote expiry so quotes price correctly.

Path: **Settings → Prices and quotes → Costs & markups**. These numbers turn quantities into your true cost and then into the customer's price.

> Warning: The starting values in this tab come with the software and are placeholders, not approved. Replace every number with your own before you send quotes. Ask your accountant about tax.

Your costs

Field	Meaning
Labor cost per hour ($)	Burdened: wage plus payroll taxes, workers' comp and insurance, per crew-member hour.
Overhead (%)	Trucks, office, insurance. Added to direct cost to get true cost.
Minimum job ($)	Smallest price you will quote.
Mobilization per job ($)	Charge for getting to a job.

Your price to the customer

- **Pricing method**: choose **Markup by category** or **Target gross margin**.
- With markup, enter a markup percent for each cost type: Materials, Labor, Equipment, Subcontractors, Disposal, Delivery, Other.
- With margin, enter **Target gross margin (%)**. The page notes a 50% markup equals a 33% margin.
- **Sales tax (%)**: your state's rate.
- **Tax applies to**: Whole job, Materials only, or No sales tax.
- **Deposit when signed (%)**
- **Round section prices up to ($)**
- **Quotes are good for (days)**
- **On proposals show**: Price for each section, or Total only.

Steps

1. Open Costs & markups.
2. Work out your true labor cost per hour and enter it.
3. Enter overhead and minimum job.
4. Pick markup or margin and fill the matching boxes.
5. Enter tax, deposit, rounding and validity.
6. Click **Save costs & markups**.

Tips

- Do a test quote after saving to see the effect. The Get started guide has a step for it.
- The deposit here also feeds the default payment schedule. See [settings-terms-payments-and-follow-ups].
- Search for "markup" or "margin" to land here fast.

If something goes wrong

- **Prices look too high or low.** Re-check the pricing method and the percent boxes. A margin and a markup are not the same.
- **Tax is wrong on a quote.** Check "Tax applies to".

Settings: Price book

Set your supplier costs and production rates for the items the automatic estimate uses, or reset to defaults.

Path: **Settings → Prices and quotes → Price book**. Your supplier prices and production rates. Every number feeds the automatic estimate (takeoff).

> Warning: Starting numbers are placeholders, not approved. Replace them with your real costs.

What is in it

Each item is a collapsible row. Items include: Mulch, Decorative stone, New bed (turf removal & soil prep), Edging, Sod, Seed, Pavers, Gravel path, Retaining wall, Plants, Removals, Boulders, Landscape lighting, Fence, Grading, Delivery and Final cleanup. (Your version may show a slightly different list.)

Inside an item you will see boxes such as:

- Cost per unit ($)
- Waste / overage (%)
- Hours per unit
- Prep hours per 100 sq ft
- Cost per sq ft ($)
- Hours per sq ft
- Cost per block ($) and Cost per cap ($)
- Hours per face sq ft
- Fixture cost ($) and Transformer cost ($)

Some items hold pairs, like "steel: 3.25, 0.06", which mean cost per foot then hours per foot.

Steps

1. Open Price book.
2. Click an item to expand it.
3. Type your supplier price and the hours your crew needs per unit.
4. Repeat for the items you sell.
5. Click **Save price book**.

To go back, click **Reset to defaults** and confirm "Reset the whole price book to VisionScaper defaults?".

Tips

- Only items you change are stored as your own. The rest follow the defaults.
- Update prices when your supplier updates theirs.
- Time one real job to learn real hours per unit.
- Search for "mulch", "pavers" or "sod" to jump here.

If something goes wrong

- **A number reverts.** Click Save price book after editing.
- **Estimates look odd.** Check Waste / overage and the hours.
- **Reset removed my numbers.** Reset replaces all your own values. It cannot be undone.

Settings: Terms & payments and Follow-up plan

Write the terms shown above the signature, set the default payment schedule, and edit the follow-up plan used when you send a quote.

Terms & payments

Path: **Settings → Prices and quotes → Terms & payments**.

- **Proposal terms**: shown on every proposal above the signature. You can change them per quote. A starter text is provided. Have it reviewed before you rely on it.
- **Default payment schedule**: rows with a label, a percent and a "when". The starter plan is a "Deposit to schedule" (using your deposit percent) "when you sign" and a "Balance" "on completion". Click **+ Add payment** to add a row, or the close icon to remove one.

Click **Save**.

> Note: Make the percents add up to 100.

Follow-up plan

Path: **Settings → Prices and quotes → Follow-up plan**. This is the default plan used every time you send a quote. Dates count from the day you send it.

The recommended plan is a thank-you the next day, a quick text on day 3, the before-and-after on day 7, a scheduling nudge on day 14, an offer to adjust on day 21, and a polite close-the-loop on day 30.

Each step has a day, a time, a channel (email or text), a subject and body, and choices for what to include (link, image, total, scope). Texts need texting set up. Use details like `{customer_first_name}`, `{project_name}`, `{quote_total}`, `{quote_link}`, `{company_name}`, `{contractor_name}`, `{valid_until}`, `{month}`, `{customer_address}` and `{deposit_amount}`. The editor previews sample values.

Buttons: **Save as my default plan** and **Reset to the recommended plan**.

Steps

1. Edit proposal terms for your business.
2. Set the payment schedule.
3. Open Follow-up plan and edit the wording in your own voice.
4. Remove steps you do not want.
5. Save as my default plan.

Tips

- You can still change terms and follow-ups on a single quote.
- Follow-ups send through a scheduled task that runs every 5 minutes. See [wp-cron-backups-and-updates].
- Texts follow quiet-hours rules. See [settings-messages-and-reminders].

If something goes wrong

- **Follow-ups do not send.** WP-Cron may not be running, or texting is not set up.
- **A tag shows as unknown.** Pick tags from the list instead of typing.

Settings: Invoice design

Design how your invoices look and what they say, with a live preview, sections, default notes, tax, due days and a reminder plan.

Path: **Settings → Money → Invoice design**. A live preview of a sample customer sits beside the form.

Look

- **Upload logo** or **Use my profile logo** (or Remove logo).
- **Logo position**: Left, Center, Right.
- **Logo size**: Small, Medium, Large.
- **Layout**: Classic, Modern, Compact, Bold.
- **Brand color**, **Font**, **Heading**.
- **License / registration line**, for example "CT HIC #0654321 · Licensed & insured".

Sections & order

Tick which sections appear and use the up and down arrows to reorder. Choose **Line item columns**: Date, Qty, Unit, Rate, Amount. Choose **Details to show**: your address, phone, email, website, license line, customer phone, customer email, service address, and a "PAID" stamp.

Default content

- **Custom fields on every invoice** (a label and an optional default value, such as PO number).
- **Notes**
- **How to pay**
- **Terms**
- **Thank-you message**
- **Footer**
- **Default sales tax %**
- **Default due in (days)**

Default reminder plan

Reminders are sent automatically for every invoice that is not paid, unless you choose a custom plan or none on the invoice. They stop the moment it is paid.

Steps

1. Upload your logo and pick a layout.
2. Choose your brand color and font.
3. Turn sections and details on or off.
4. Write notes, payment instructions and the footer.
5. Set tax and due days.
6. Set the reminder plan.
7. Click **Save invoice design**.

Tips

- Search "logo" or "invoice" to jump here.
- Put real payment instructions in How to pay. Online payment needs [settings-get-paid-online].
- Check the preview at small size too.

If something goes wrong

- **Preview is blank.** Wait a second; it updates after you stop typing.
- **Reminder texts do not go.** Texting must be set up on the site.
- **Changes missing on old invoices.** Design changes apply to how invoices are shown. Check the invoice itself.

Settings: Get paid online (Stripe) and text messages

Connect your own Stripe account so customers can pay deposits and invoices by card or bank, and see whether texting is on.

Path: **Settings → Money → Get paid online**.

Get paid online (Stripe)

If the site owner has not set up online payments, the tab says "Online payments aren't set up on this website yet." Otherwise you see how customers pay: card, Apple Pay or Google Pay, and bank account (ACH) if the site allows it. The money goes to your own Stripe account.

The tab also lists the processing rates with a worked example for a $1,000 invoice. The rates are set by the site owner and are placeholders, not approved. They include card and bank network fees. Bank payments clear in about 4 business days, according to the page. Payout time to your bank is described as about 2 business days.

Steps

1. Click **Connect with Stripe**. You go to Stripe to enter your details, following Stripe's current instructions.
2. When you return, the tab shows "Ready to take payments" if Stripe has what it needs. If it says Stripe still needs details, click **Finish Stripe setup** or **Check status**.
3. Later use **Update my Stripe details** or **Open my Stripe account**.

Instant Payout

If the site offers Instant Payouts and your account is ready, an **Instant Payout** card shows what is available. Enter an amount and click **Pay out instantly**. It shows the fee and what you receive, about 30 minutes to a debit card. Stripe needs a debit card on your account.

Text messages

A second card says "Texting is on" when texting works. Then follow-ups and visit reminders can go by text, and customer replies are logged and emailed to you. If it is not set up, the page says the site owner adds Twilio in Settings → VisionScaper, and email works now. See [contractor-tools-text-and-payments].

Tips

- Use "How to pay" on your invoice design to tell customers the options.
- Search "stripe" or "credit card" to find this tab.
- Autopay for saved cards is a separate site-owner switch.

If something goes wrong

- **Connect with Stripe does nothing.** Billing or Connect may not be set up on the site.
- **Not ready.** Stripe may still need documents. Finish setup there.
- **No Instant Payout card.** The site owner has not offered it, or your account is not ready.

Settings: Crew, team & hours

Add your field employees with roles and crews, link them to their accounts, and set your normal working hours.

Path: **Settings → Team → Crew, team & hours**.

Your crew

These are your field employees. They show up when you schedule visits. Crew sheets (address, map link, scope, notes) can be emailed or texted to them. You, the owner, do not count toward your plan.

For each person:

- **Name**
- **Email or mobile (for crew sheets)**
- **Crew (e.g. Crew A)**. People who work together share a crew name.
- **Role**: Crew, Crew leader or Manager.
- **Their VisionScaper account email (optional)**. This links them to their own account. Remove them here and their access ends.
- A private section for your own notes. The page says it is never shown to the employee, other contractors or anyone else.

Click **+ Add crew member**, then **Save crew**.

Usage bars show how many employees and crews your plan allows. Availability, time off, internal cost rates and switching people off are under Field work → Team.

Working hours

Heading **Working hours**: your normal working day. The default shown is 7 AM to 5 PM. Choose **Day starts** and **Day ends**. The end must be after the start. New job days start at the beginning of it, and the calendar shows how much of each day is free. Click **Save working hours**.

Steps

1. Click **+ Add crew member**.
2. Type name and contact.
3. Choose role and crew.
4. Add their account email if they will sign in.
5. Click Save crew.
6. Set working hours and save.

Tips

- Search "working hours" or "private notes" to jump here.
- Give each person their own sign-in. Do not share one account.
- Permissions per role are in [team-roles-and-permissions].

If something goes wrong

- **Cannot add another person.** You reached your plan's employee limit.
- **A person sees nothing.** Their account email may not match, or their role may have few rights.
- **Hours will not save.** The end of the day must be later than the start.

Team roles and permissions

What Manager, Crew leader and Crew can do by default, and how to change each permission on the Team permissions grid.

You, the owner, can always do everything. Everyone else has one of three roles, set on **Settings → Team → Crew, team & hours**: **Crew**, **Crew leader** or **Manager**. The rights for each role are enforced on the server, not only on screen. Crew sheets never show prices, costs or margins.

Linking a person to an account

Type the email of their own VisionScaper account in **Their VisionScaper account email (optional)**. That links them to your company. Remove them from the crew list and their access ends.

The Team permissions grid

Below the crew list is a card **Team permissions** with three columns: Manager, Leader, Crew. Each row has a check box. Click **Save permissions** when done.

Rows include:

- Use templates on jobs; create and edit company templates; set default templates
- See costs, markups and margins
- See every job (not only their own); assign people and reschedule
- Manage employees and availability; review and approve hours worked
- Create checklists and field forms; approve jobs and override required items
- See customer phone and email; share job photos with customers
- See labor rates, job costs, revenue and profit
- Clock their crew in and out on shared jobs
- Phone app: see every customer; edit customers and properties; add potential customers; see private customer notes; door-to-door; measure properties; view and share landscape plans; see and assign everyone's tasks; approve messages, follow-ups and review requests
- Export approved hours for payroll
- Turn automatic payment on or off
- See live team location; see location history and mileage
- Create and approve purchase orders; receive deliveries on purchase orders (no prices)
- Run the first-run guide and sample data
- Crew app: messages with the office

Starting points (from the screen)

Right	Manager	Leader	Crew
Use templates on jobs	Yes	Yes	Yes
Create and edit templates	Yes	No	No
See costs, markups, margins	Yes	No	No
See every job	Yes	No	No
Assign people and reschedule	Yes	No	No
Approve hours	Yes	No	No
See customer phone and email	Yes	Yes	Yes
See labor rates, profit	No	No	No
Clock their crew in and out	Yes	Yes	No
Phone app: add potential customers	Yes	Yes	Yes

The grid always shows your server's current values, so a newer plugin may differ from this table.

Steps

1. Add or open a crew member.
2. Choose their role.
3. Scroll to Team permissions.
4. Tick or untick the rights you want per role.
5. Save permissions.

Tips

- Keep financial rights off for crew.
- Search "team permissions" to jump to the grid.
- Alerts from the field can also go to managers if "Alert managers" is on in Field work → Settings.

If something goes wrong

- **A Manager cannot see profit.** "See labor rates, job costs, revenue & profit" is off for Manager by default. Turn it on if you want it.
- **Changes do not apply.** Click Save permissions, then have the person reload.

Settings: Messages & alerts and Reminders

Edit the wording of every automatic message, choose email, text or in-app, and set when appointment reminders go out.

Messages & alerts

Path: **Settings → Messages and connections → Messages & alerts**. Every message is pre-written and ready to go. Open one to rewrite it.

Groups on the tab: **Alerts to you**, **Jobs & payments**, **Appointments**, **Requests** and **Field operations**. Each row shows when it is sent and its channels (email, text, in-app) or Off.

Inside a message:

1. Tick or untick **Send this message automatically** (for alerts: **Send me this alert**).
2. Choose **Send by**: Email, Text, In-app. A Text option says "(not sending)" if texting is not set up or not in your plan.
3. Edit **Email subject**, **Email (and in-app) message**, and **Text message (short version)**.
4. Insert details by tapping one in **Insert a detail**. Write "Hi {customer_first_name}" and Jane sees "Hi Jane". Add a fallback after a bar: `{customer_first_name|there}`.
5. Watch the live preview. Unknown tags are flagged and would be left out.
6. Click **Save**, **Send me a test**, or **Reset to the original**.

Text messages automatically get an opt-out line. Some messages have timing boxes, such as days after the due date. Texts to you have **Quiet hours** you can set.

Reminders

Path: **Settings → Messages and connections → Reminders**.

- **Reminders to your customers**: sent before every appointment. For each, set a number and unit before, and choose Email, Text, In-app. You can limit a reminder to certain appointment types. Texts never go out between 9 pm and 8 am. An overnight one is sent at 8 pm the evening before.
- **Reminders to you**: your own reminders.
- **When you book, move or cancel**: tick to tell the customer automatically.
- **Your schedule in your own calendar**: a button to update your calendar for Google, Apple or Outlook.

The wording of reminders is edited under Messages & alerts → Appointment reminder. Click **Save reminder schedule**.

Steps

1. Open Messages & alerts and review each group.
2. Edit the messages you want in your own voice.
3. Send yourself a test.
4. Open Reminders and set your schedule.
5. Save.

Tips

- Your plan may limit how many reminders you can add per appointment.
- Texting needs setup. See [contractor-tools-text-and-payments].

If something goes wrong

- **Texts show "not sending".** Twilio is not set up or texts are not in your plan.
- **A reminder came late.** Quiet hours moved it, or WP-Cron ran late.

Settings: Intake questions and Quick replies

Add your own questions to the homeowner request form and save quick replies you can drop into any conversation.

Intake questions

Path: **Settings → Messages and connections → Intake questions**.

Add the questions you always end up asking on the phone. Homeowners answer them before they send the request, so you can price the job the first time. If intake is not in your plan, you see a lock note.

1. Pick a chip for a service, or **Every request** for questions asked on all requests.
2. Open **VisionScaper already asks N questions for this service** to see the built-in ones.
3. Click **+ Add a question**.
4. Type the question, for example "Is there a dog in the yard during work hours?"
5. Choose the type: Short answer, Long answer, Pick one, Pick any, Yes / No, Number, or Date.
6. For Pick one or Pick any, type choices separated by commas.
7. Optionally add why you ask. People answer more when they know why.
8. Click **Save my questions**.

Quick replies

Path: **Settings → Messages and connections → Quick replies**.

In any conversation, tap the lightning icon to drop one in. `{customer_first_name}` fills in automatically.

1. Edit the starter replies or click **+ Add a quick reply**.
2. Use the trash icon to remove one.
3. Click **Save quick replies**.

Starter examples ask to come look at the property or promise a quote within two business days. Replace them with your own wording. Placeholders such as [day] and [time] are text you replace by hand before sending.

A usage bar may show the number of quick replies your plan allows.

Tips

- Keep intake short. Three to five questions per service is easier for homeowners.
- Add a "why" for questions about gates, pets or utilities.
- Quick replies save typing. Keep them friendly and specific.

If something goes wrong

- **Questions do not appear for a service.** Make sure the right service chip was selected when you added them.
- **Plan prompt appears.** The feature or its limit is not in your plan. See [plans-billing-credits-and-usage].
- **A blank reply is dropped.** Empty replies are not saved.

Settings: Connected apps (Google Contacts, QuickBooks, request form)

Connect Google Contacts and QuickBooks Online, and put the request form and self-booking on your website.

Path: **Settings → Messages and connections → Connected apps**. Bring customers in and out of VisionScaper. Keys are stored encrypted and not shown again. CSV and vCard files work without any setup; use Import / Export on the Customers page.

Google Contacts and QuickBooks Online

Each has a card with a **Set-up walkthrough** (4 steps, about 10 minutes). You create an app on the provider's site, then paste its details here. Follow each provider's current instructions.

Fields:

- **Client ID** and **Client secret**
- **How data moves**: Import only, Export only, or Both ways
- **QuickBooks company**: Production or Sandbox (QuickBooks only)
- **Security key** (QuickBooks only, optional): a secret that proves a message is from QuickBooks, used for instant updates
- **Only import contacts with this Google label** (Google only)
- Tick **Update automatically every hour**
- Tick **Pass on deletions** (off is safer)

Copy the redirect address shown in the walkthrough into the provider's console. For Google, enable the People API, add the contacts scope, and set publishing status to In production, or Google disconnects you every 7 days. Exported customers go into a "VisionScaper Customers" label.

Steps

1. Open the card and follow the walkthrough.
2. Paste Client ID and Client secret.
3. Choose how data moves.
4. Click **Save settings**.
5. Click **Connect Google Contacts** or **Connect QuickBooks Online**.
6. To stop, click **Disconnect**. Customers stay in both places.

QuickBooks sync covers customers only for now. QuickBooks Desktop is not supported.

Request form for your website

A form customers fill in on your site. It makes a lead, sends the customer an instant reply and alerts the office. It is off until you tick it. Options:

- Services offered (from your service templates)
- **Photos allowed (0 = none)**
- **Self-booking (optional)**: visit length in minutes and who can be booked
- **Spam protection**: always on are a hidden trap field, a minimum fill-in time and a per-address limit. Optional Cloudflare Turnstile with its **Turnstile site key** and **Turnstile secret key**.
- **Put it on your website**: a shortcode for a WordPress page, a one-line snippet, or a link to the form page.

Tips

- Search "quickbooks" or "captcha" to jump here.
- Leave the secret box blank to keep the saved one.

If something goes wrong

- **Needs to reconnect.** The permission expired. Click Reconnect.
- **Items need review.** Click the "need review" button to resolve them.
- **Spam arrives.** Turn on Turnstile.

Plans, billing, credits and usage ("Current plan")

How the Hub's plan page works: free trial, choosing a plan, usage bars, AI credits, failed payments, exports, and the owner's plan tools.

In the Hub, the last menu group (Settings & Integrations) has an item that reads **Upgrade plan** while a higher plan exists, and **Current plan** on the highest plan or when nothing is billed. It opens your plan page.

> Warning: Plan names, prices, allowances and which features each plan includes are unapproved placeholders until the site owner sets them. This article describes how the screens work, not what anything costs.

If billing is off

The page says "Everything is included". Billing isn't switched on, so you have the full Contractor Hub at no charge. You still get the **Export your records** card.

If billing is on

- **Free trial.** Start a trial by verifying your email (and phone by text when texting is set up) and adding a card. The card is not charged until the trial ends. The page says it reminds you a week before and the day before. A top banner shows days left. A business that has already had a trial may not get a second.
- **Choose a plan.** Toggle **Monthly** or **Yearly**. Click **Choose [plan]** to go to Stripe's secure checkout, or **Switch to [plan]** to change. Stripe works out the difference for the rest of the period. A downgrade starts at the end of the paid period.
- **Card, invoices & receipts** opens Stripe's portal. **Cancel subscription** ends it at the period end. **Keep my subscription** undoes that.
- **Your usage.** Bars for employees, crews, AI credits, landscape plans per month, storage and more. Monthly allowances start again on the 1st. Reaching a limit never deletes anything. It only stops new additions. When AI credits run out you can also buy a credit pack. A **Recent usage** list shows the ledger.
- **Compare plans.** A matrix and a "Not sure which plan?" quiz help you choose.
- **Export your records.** Download Customers, Properties, Quotes, Invoices, Schedule and Activity log as spreadsheets any time, even if paused or cancelled.

When a payment fails

The stages are: notice, reminder, restricted, read-only, then suspended. The days are set by the site owner. Everything stays safe, and paying restores everything instantly. When restricted, AI, new landscape plans, buying credits or storage, and large uploads pause. When read-only you can view, export and pay, and you are hidden from new homeowners. A suspended account shows "Suspended - Payment Required" with a button to update the payment method.

For the site owner

- **Settings → VisionScaper Plans**: turn on contractor billing, set trial length and the plan for the trial, edit plans, set the failed-payment days, and see contractors' status. Click "Create these plans in Stripe". Add the subscription webhook events the page lists.
- **Settings → VisionScaper Entitlements**: the Plan matrix, Prices & upgrade destination, and "Give one account a feature (or take it away)" with a reason that is recorded.
- **View as customer** (administrators only): preview the Hub as a no-plan sign-up, trial, any paid plan, overdue, suspended or ended. Nothing changes for the account.

Tips

- Check usage bars before a busy month.
- Add Stripe keys first. See [selling-credits-and-storage].

If something goes wrong

- **Choose button disabled.** The plan may not be purchasable yet ("Not available yet").
- **A feature shows a lock.** It is not in your plan. The preview offers "See plans".

Contractor approval (for the site owner)

How contractor applications arrive, how to approve, suspend or reject them, and what the applicant sees.

By default, a new contractor must be approved before they can use the Hub. You decide who gets in.

How an application arrives

1. A contractor opens the Hub page and creates an account.
2. They fill in the Business profile form and tick the Terms of Service and confidentiality boxes, then click **Apply to be a VisionScaper contractor**.
3. They see "Your application is being reviewed" and are told they will be emailed when approved.
4. The application appears in WordPress under **Settings → VisionScaper Contractors**. A number badge shows how many are pending.

Review and decide

The page lists each business with: Business (logo, website, short bio), Contact, Area (town, state, radius, services), License / insurance (license number, "Insured" tick, years in business), Activity (quotes sent, signed, done, reviews) and Status. Check their license and insurance before approving.

Buttons: **Approve**, **Suspend**, **Reject**. Status values are pending, approved, suspended and rejected. You cannot suspend or reject the owner. You, the site owner, are always approved.

When you approve, VisionScaper emails the contractor "You're approved as a VisionScaper contractor" and notifies them in the app. Suspending or rejecting also notifies them of the status change.

Steps

1. Go to Settings → VisionScaper Contractors.
2. Read the new row.
3. Check the license and insurance by your own process.
4. Click Approve, or Reject.
5. Suspend a contractor later if you need to pause them.

Automatic approval

Under Settings → VisionScaper → Contractors there is a box **Approve contractor applications automatically (not recommended)**. Leave it off unless you are happy for anyone who applies to get in.

If you turn off **Turn on the Contractor Hub, Find a Local Contractor and My Projects**, the approval page says contractor tools are switched off.

Tips

- Approved contractors appear under Find a Local Contractor for homeowners.
- After approval, the contractor starts the free trial if billing is on. See [plans-billing-credits-and-usage].

If something goes wrong

- **The contractor did not get an email.** Check your site's mail setup. They also get an in-app message.
- **They still see "being reviewed".** Ask them to reload after you approve.

Caching and minify exclusions

Two exclusions that keep VisionScaper working when you use a caching or minify plugin: its JavaScript and its REST routes.

The readme gives two rules for sites that use a caching or minify plugin.

1. **Do not combine or minify VisionScaper's JavaScript.** Exclude `assets/js/*.js` in this plugin from JavaScript combining and minification. They are ES modules, which break when merged into one file.
2. **Do not page-cache the VisionScaper API.** Exclude `/wp-json/dreamscaper/*` from page caching.

Why

The app loads many small JavaScript module files and talks to the server through REST routes. Cached API replies can show the wrong person's data or stale results. Merged modules stop loading.

Steps

1. Open your caching or optimization plugin's settings.
2. Find the JavaScript or "minify/combine" exclusion list.
3. Add the path to this plugin's scripts: `/wp-content/plugins/<plugin-folder>/assets/js/`. Use your real folder name.
4. Find the "never cache URLs" list.
5. Add `/wp-json/dreamscaper/` (or the pattern `/wp-json/dreamscaper/*`).
6. Clear the cache.
7. Open your Designer and Hub pages in a private window and click each button.

Other cache points

- Library photos and materials are loaded from lists with a version number added to the address, so a replaced photo should not stay stale. Click **Rebuild photo list** if you copied files in by FTP.
- If you use a CDN, make sure it also passes `/wp-json/dreamscaper/` through uncached.

Tips

- Test after every change to your optimization plugin.
- Exclude the plugin folder from "delay JavaScript" features too if the button stops responding. This is general advice; the readme only names combining and minifying.

If something goes wrong

- **Button does nothing or the app is blank.** A script is being combined, delayed or minified. Remove it from the optimizer.
- **Someone sees old data.** The API may be cached. Add the exclusion and clear everything.
- **Console shows "unexpected token" or module errors.** That points to minified modules.

WP-Cron, backups and updates

Make sure follow-ups and reminders run on time, back up before upgrading, and upgrade by installing over the old version.

WP-Cron: why it matters

VisionScaper sends follow-ups, reminders and other automatic messages through WordPress's scheduled task system (WP-Cron). The readme says follow-ups go out every 5 minutes. The main task (`dreamscaper_crm_tick`) checks for due follow-ups, recurring invoices and expiring quotes. Other tasks run hourly (for example field operations, integrations and subscriptions) or daily (clean-ups and messaging housekeeping). The messaging and receptionist tools add their own schedules.

WP-Cron only runs when someone visits your site. On a quiet site, tasks can run late.

Make it reliable

1. Ask your host how to add a real cron job (or use your host's cron tool).
2. Make it call `wp-cron.php` on your site every few minutes. The readme recommends this for low-traffic sites.
3. Optionally disable WordPress's visit-triggered cron with the standard WordPress setting `DISABLE_WP_CRON` in `wp-config.php`. This is a general WordPress step, not specific to VisionScaper.
4. Send a test follow-up or a test reminder to yourself and see if it arrives on time.

Backups

Back up the database and your files before you install, upgrade or change settings in bulk. Your business data lives in the WordPress database. Designs of visitors who did not create an account live only in their own browser, so you cannot back those up.

Updates

1. Take a backup.
2. Go to **Plugins → Add New → Upload Plugin** and upload the newer zip. Install it over the old one and activate.
3. New database tables are created automatically on upgrade (as the changelog says for 2.42.0).
4. Some releases ask for extra steps. The 2.43.3 notes say to upload the textures folder and click **Rebuild photo list** under Library packs on Settings → VisionScaper.
5. Clear your cache and test both pages.

To roll back, reinstall the older version. The 2.42.0 changelog notes that new tables are left unused after a rollback.

Tips

- Read the changelog in the plugin's readme before each upgrade.
- Keep one test page for each shortcode.

If something goes wrong

- **Follow-ups arrive hours late.** WP-Cron is not running often enough. Add a real cron job.
- **Nothing sends.** Check the site's mail setup and, for texts, Twilio.
- **A photo or material is missing after upgrade.** Click Rebuild photo list.

The Designer

Photos, plants, materials, seasons, the Time machine and AI tools.

The Designer at a glance

A tour of the VisionScaper Designer screen: top bar, seven tools, side panel, scene bar and the step-by-step guide.

The Designer is the full-screen studio where you place plants, paint ground materials and watch a yard grow on top of a photo. This article names every part of the screen so the other articles make sense.

Top bar

From left to right you will see:

- **Home** (house icon, "My designs"): leaves the design and goes back to the home screen. The design saves first.
- **Design name**: a text box. Type to rename the design.
- **View tabs**: one tab per view (angle) of this design, plus **Add view**. Double-click a tab to rename it.
- **Status**: shows "Saving…", "Saved" or "Not saved".
- **Undo** and **Redo**, then **History** and **Layers**.
- A cloud icon when you are signed in, meaning the design is mirrored to your account.
- **Ask AI** (sparkle button) opens the Design with AI panel.
- A **Get a quote** style button appears only if the site owner has turned on sending designs to the business.
- **More** (the menu button): Design versions & notes, Compare designs, Presentation mode, Save a picture, Share on social media, Print, Save to my Inspiration Board, Post to VisionScaper Browser, Request a consultation, Ask a question, and "Help: show me around". Items for contractors appear only for signed-in contractors.

The seven tools (left side)

Tool	Key	What it does
Move	V	Tap a plant or bed to move, resize or change it
Erase & fill	W	Select part of the photo, then remove it or cover it
Add	P	Plants, mulch and stone, beds and patios
Measure	M	Distances, areas and zones
Photo setup	J	Scale, crop and adjust the photo
Ask AI	A	Say what you want and the AI plans it
Pan	H	Drag the picture around

Some tools hold sub-tools that appear as tabs at the top of the side panel: Add has **Plants & things**, **Mulch, stone & lawn** and **Draw beds & patios**. Photo setup has **Scale**, **Crop** and **Adjust**. Erase & fill has **Pick the spot** and **Remove it**.

Side panel

The panel on the right shows the options for the tool you chose. On a narrow screen use the small grip to show or hide it.

Scene bar (under the picture)

- Season buttons: Peak look, Spring, Summer, Fall, Winter.
- **See it grow** slider with Play and a **Fully grown** button.
- A scale chip, "Hold to see the original photo", Flip sunlight direction, and the Day/night toggle.

Step guide

A strip above the picture walks a new user through five steps: Set the scale, Add plants, Add mulch, stone or a bed, Watch it grow, Save, share or send. **Show me** jumps to the right tool, **Next step** skips, and the **x** hides the guide. The **?** opens "How VisionScaper works".

Tips

- Zoom with the mouse wheel over the picture, pinch on a touch screen, or the + / fit / − buttons.
- Hold **Space** while using any tool to pan.

If something goes wrong

- A button you expect is missing: some items only show when you are signed in, or when the site owner has turned the feature on.
- The panel is hidden on a phone: tap the grip between the picture and the panel.

Start a new design

How to begin a design from the home screen: the Design my yard wizard, the source buttons, naming, and starting from an existing design.

Every design starts with a picture of the yard. You can reach the Designer from the VisionScaper home screen in two ways.

Before you start

- Have a photo ready, or be ready to use your camera.
- You do not need an account to design. Sign in if you want your designs saved to your account and available on other devices.

Steps: the Design my yard wizard

1. Open VisionScaper and tap **Design my yard** ("Add a photo, place plants, watch them grow").
2. On the first screen, titled "Add a photo of your yard", optionally pick which part you are designing: Front yard, Back yard, Side yard, Patio or deck, or Whole property.
3. Choose a photo source: - **Take a photo**: your phone camera with framing guides. - **Upload a photo**: a photo you already have. - **Bird's-eye view**: aerial imagery of your address. - **Explore in 3D**: appears only when the site owner has added a Google Maps key. - **Sample yard**: a ready-made yard to practice on.
4. After the photo is chosen it is saved as a design right away. Step 2 is "Name it and say what matters". Type a name, then optionally tap goals: Low maintenance, Privacy, Color all season, Curb appeal, Kid & pet friendly, Native plants, Room to entertain, Fix drainage.
5. Tap **Open the designer →**.

Tap **Save and finish later** at any step. The home screen then shows a "Continue your design" card so you can pick up where you left off.

Steps: the "Start a new design" window

You may also see a window called **Start a new design** (for example from My designs). It has the same source buttons, a **Name (optional)** box and an "Or start from…" section:

1. Tap **Or start from…**
2. Tap **One of my designs or saved views**.
3. For any design, choose **Copy whole design** (a copy to try a new idea), or **Fresh from "[view name]"** to start again from that view's original photo.

What happens next

The first time a view opens, the Designer jumps to the scale step on a photo, with a note such as "Quick setup: tell me how big something is (like your front door)". On a bird's-eye view it opens the Add tool instead, because aerial views are already to scale.

Tips

- Best results: stand back so the whole area, and some of the house, fits. Hold the phone sideways at eye level and keep it level.
- A default name like "My Dream Yard" followed by the date is filled in for you. Change it any time in the name box at the top of the Designer.

If something goes wrong

- **Nothing happens after choosing a photo**: the message under the buttons tells you why, for example that the photo format cannot be opened. Try a JPG or PNG.
- **"Explore in 3D" is missing**: the site owner has not added a Google Maps key.
- **"This browser is blocking storage"**: a private window can stop designs from saving. Use a normal window.

Take or upload a photo of your yard

Use the in-app camera with framing guides and an eye-level line, or upload an existing photo.

A photo of your own yard is the best base for a design. You can shoot it inside VisionScaper or pick one you already have.

Before you start

- The live camera needs the page to load over **https**. If the camera is not available, VisionScaper falls back to your phone's photo picker.
- Allow camera access when your browser asks.

Steps: take a photo

1. Start a design and choose **Take a photo** ("Use your phone camera with framing guides").
2. Read the tip on screen: hold your phone sideways at eye level and fit the whole area in the frame.
3. Use the grid. The four corner marks help you frame the shot, and a line labeled **Eye level** shows where the camera is looking.
4. Tap the round shutter button (**Take photo**).
5. To back out, tap **Cancel**.

On phones that have a motion sensor, VisionScaper records the phone's tilt at the moment you shoot. It uses that tilt to place the blue eye-level line for you. On some phones the browser asks permission to use motion sensors first. If there is no sensor, the line is a guess that you can drag later.

Steps: upload a photo

1. Choose **Upload a photo** ("Pick a photo of your yard you already have").
2. Pick an image file. Any common image works, such as JPG or PNG.
3. The photo opens in the Designer.

What VisionScaper does to the picture

- It shrinks very large photos so the longest side is about 1600 pixels.
- It trims very long, thin photos (more than 2.2 times wider than tall, or the reverse) to a more normal shape.
- It saves the photo with the design on your device.

Tips

- After the photo loads, set the scale: see Set the scale for me.
- Take one photo per angle you care about and add each as a view.

If something goes wrong

- **"That photo format can't be opened in this browser"**: re-save it as a JPG or PNG.
- **The camera screen never appears**: open the page over https, check the browser's camera permission, or use Upload a photo.
- **The eye-level line looks off**: drag the blue line in the Scale tab. See the scale articles.

Tips for a good yard photo

How to frame, light and level a photo so plants, ground materials and the grow slider look right.

The Designer can only be as believable as the photo under it. A few habits make a big difference.

Before you start

Decide which areas you want to design. You can add one photo (view) per angle to the same design, so you do not need one perfect shot of everything.

Steps

1. **Stand back.** Fit the whole area and some of the house in the frame. The house gives the scale step something to measure against, such as a front door.
2. **Hold the phone sideways.** The in-app camera tip says to hold your phone sideways at eye level and fit the whole area in the frame.
3. **Keep the phone level.** A tilted phone tilts the horizon. The camera screen has an "Eye level" guide line to help.
4. **Pick the light.** The built-in How it works guide suggests a bright, overcast day, or the sun behind you.
5. **Clear the foreground if you can.** Hoses, bins and toys can be removed later with Remove something, but a cleaner photo needs less cleanup.
6. **Shoot each angle you care about.** Every view is saved inside the same design. Use **Add view**.
7. **Show some ground.** Painted mulch, lawn and stone need visible ground to sit on. Make sure the part you want to change is not hidden behind a car or fence.

Tips for a photo of a single plant, planter or boulder

When you add your own item from a photo, the guidance is different: step back so the whole item fits, shoot from the side at about waist height rather than from above, use a plain background such as sky, lawn or a wall, and photograph plants in bloom if you can, because VisionScaper hides the flowers out of season. See Add your own item from a photo.

Tips for Plant ID photos

Choose the part you will photograph, such as a flower or a single leaf. Fill the frame with that part, keep it in focus and shoot in daylight. See Plant ID.

After you have the photo

- Set the scale (door, garage door, car, person, or "Set it up for me").
- If the photo is tilted or walls lean in, use the **Crop** tab: it can straighten the picture and fix vertical and horizontal perspective. It makes a new view and leaves the original view untouched.
- Use the **Adjust** tab for light and color: Exposure, Brightness, Contrast, Highlights, Shadows, Temperature, Tint, Saturation, Vibrance, Hue, Greens and Sharpen, plus presets such as Bright & fresh, Golden hour, Lush green, Overcast fix and Soft & airy. Adjustments are not baked in; Reset all undoes them.

If something goes wrong

- **Plants look too big or small**: the scale needs a second look. See Set the scale for me.
- **Painted ground looks stretched**: lower the "Perspective of painted ground" slider. See Paint ground materials.
- **The photo is dark**: try an Adjust preset or raise Exposure.

Design on a bird's-eye (aerial) view

Find your address on aerial imagery, frame the yard and design from above at true scale.

A bird's-eye view looks straight down at your property. Because the imagery is measured, plants and beds appear at their real size without the scale step.

Before you start

- You need a street address, town and state.
- The window says: any US address; Connecticut has 3-inch state imagery; elsewhere USGS imagery (about 2 feet per pixel). The site owner can point the Designer at a different imagery service in Settings.
- If a visitor is not signed in, the number of aerial map tiles per visitor is limited (not verified how many).

Steps

1. Start a design and choose **Bird's-eye view** ("Find your house on aerial imagery").
2. Type the address in the box. Pick it from the autocomplete list if it appears, or tap **Find**.
3. A map opens. Drag it so your yard fills the screen. Zoom with a pinch, the mouse wheel, or the plus and minus buttons.
4. The note on screen says "What you see is what you'll design on".
5. Tap ✓ **Use this view**. The button changes to "Saving…" while the pictures load.
6. The Designer opens on the aerial image and switches to the Add tool, with a note that the bird's-eye view is to scale.

What is different about aerial views

- The **Scale** tab shows "Map scale" and a **Pixels per foot** slider. Only adjust it if something looks off.
- There is a **Show a person for scale** checkbox.
- The eye-level line and the scale chip do not apply, because there is no horizon.
- Measurements on an aerial are accurate. On photos they are estimates, marked with "≈".
- Arrow buttons in the Move panel move items on the map instead of farther or closer.

Tips

- Aerial views are best for planning bed sizes, spacing, patios and walkways.
- Add a ground-level photo as a second view so you can see the same design from the street. See Add and manage views.
- Without a Google Maps key, address autocomplete uses OpenStreetMap. With a key it uses Google.

If something goes wrong

- **"Could not find that address"** or **"There are no aerial photos for this address"**: check spelling or take or upload a photo instead.
- **"The aerial pictures didn't finish loading — try again"**: wait a moment and tap Use this view again.
- **The image looks old or blurry**: imagery is a public source and is only as recent and sharp as the provider makes it.

Try a sample yard

Practice in the Designer with five ready-made yards before using your own photo.

A sample yard is a ready-made photo with its scale already set. It is the quickest way to try the tools.

Steps

1. From the home screen, tap **Try a sample yard** (under "How it works", "Take the tour" and "Inspiration Board"). You can also choose **Sample yard** when starting a design.
2. In the window **Choose a sample yard**, tap one: - **Front bed**: a planting bed along the house. - **Colonial front yard**: big open lawn, walkway and driveway. - **Back yard**: deck, fence, shed and bare ground for a patio. - **Cape Cod front yard**: stone wall, gravel drive and a flagstone path. - **Ranch front yard**: wide lawn, brick ranch and a long front walk.
3. The design opens named "Sample" plus the yard name.

What to try

- Open the **Add** tool, tap a plant in the library and tap the photo to place it.
- Slide **See it grow** to watch it mature.
- Paint a patch of mulch, or use **Add an area**.
- Try **Remove something** on a bin or hose, if your photo has one.
- Take **Take the tour** from the home screen or "Help: show me around" in the More menu.

Tips

- The sample photos are bundled with VisionScaper. If a sample photo cannot load, a painted drawing of a front yard is used instead.
- Samples are saved as normal designs in My designs. Delete them there when you are done.
- Each sample comes with its eye-level line already placed, so you can start adding plants right away.

If something goes wrong

- **The sample window does not appear**: reload the page and try again.
- **Plants look wrong size**: open the Scale tab and use "Test growth" to check.

Explore your home in 3D and save angles

Fly around your property in Google 3D, bookmark viewing angles and get directions for photographing from a saved spot.

Explore in 3D lets you orbit your home on a photorealistic map, bookmark good viewing angles, then photograph from the matching spot.

Before you start

- The site owner must add a **Google Maps API key** in Settings → VisionScaper. The key setting mentions enabling the Maps JavaScript API. Without the key the **Explore in 3D** button does not appear. Follow Google's current instructions for creating and restricting the key.
- Saved angles store camera positions only. No Google imagery is captured, stored or edited.

Steps

1. Start a design (or tap **Add view**) and choose **Explore in 3D**.
2. Type your address and tap **Go**.
3. Fly around. Drag to orbit, scroll or pinch to zoom, right-drag to tilt.
4. When you like a view, tap **Save this angle**. Name it when asked (the default is "Angle 1", "Angle 2" and so on).
5. In **Saved angles**, each angle shows what it faces (for example north-east) and how many meters away you are. Use **View** to fly back, the bin icon to delete it, or **Snap from here**.
6. **Snap from here** opens the camera with directions: "Go to the spot that matches [name]: face [direction], about [x] ft from the house. Phone sideways at eye level."
7. Take the photo. It opens in the Designer, labeled with the angle's name.

Tips

- Angles belong to the design, so the next time you open Explore in 3D for that design the first saved angle is shown.
- Use Explore in 3D to decide which angles of your home are worth photographing.

If something goes wrong

- **"3D view is unavailable right now. You can still take or upload a photo."**: Google 3D could not load. Check the key and your connection.
- **"Address not found"**: add the town and state.
- **Button missing**: no Maps key is set.

Add and manage views of one design

Keep several photos (angles) in one design, rename or delete views, and know what a new view copies.

A design can hold more than one picture. Each picture is called a **view** and has its own plants, ground changes and scale.

Steps: add a view

1. In the top bar, tap **Add view** (the plus tab after your view tabs).
2. In the window **Add another view**, pick a source: Take a photo, Upload a photo, Bird's-eye view, Explore in 3D (if available), Sample yard, or **Design with AI**.
3. The new view opens and appears as a tab. It is named "View 2", "View 3" and so on.

Rename a view

Double-click (or double-tap) the tab, type a name in the box and confirm.

Delete a view

1. Select the tab of the view.
2. Tap the small **×** on that tab. It appears only when the design has more than one view.
3. Confirm the question that names the view.

Other ways a view is created

- **Crop & straighten** makes a new view and leaves the original in its tab.
- AI results can be sent into the editor as a new view so every tool works on them.

What the tabs show

An aerial view has a map icon and a photo view has a camera icon.

Tips

- Name views by what they show, such as "Front walk" or "Back patio".
- The season, years-from-now and day or night settings belong to the whole design, so they apply to every view.
- The thumbnail used on My designs is taken from the open view.

If something goes wrong

- **No × on a tab**: a design needs at least one view.
- **A deleted view is gone**: deleting a view also deletes its stored photo, and there is no undo for it. Confirm only when you are sure.

Set the scale with "Set it up for me"

Let VisionScaper find eye level and a door or car, then check the yellow 6-foot people so plants are the right size.

Scale is what makes a 6-foot shrub look 6 feet tall in your photo. Do it once per photo view before adding plants. Aerial (bird's-eye) views are already to scale and skip this.

Before you start

- Have a photo view open in the Designer. The tool opens by itself the first time a view loads.
- You can also open it from **Photo setup → Scale**, from the scale chip under the picture ("Set the scale (how big things are)"), or with the **S** key.
- Signing in lets VisionScaper also find a door, garage door, person or car with AI.

Steps

1. In the **Scale** tab, under **Set the scale for me**, tap ✨ **Set it up for me**.
2. VisionScaper finds eye level, trying in this order: your phone's tilt if the photo was taken in the app, then the straight lines in the photo, then an AI estimate if you are signed in. The message tells you which it used.
3. If it spots a standard-size object, a dashed box appears with a question such as "Is the dashed box your front door? I'll treat it as … tall." Tap **Yes, that's right** or **No, skip it**.
4. Under **Do these people look right?** look at the three yellow people. They are all 6 ft tall: one near, one in the middle, one far. Next to your house and door they should look like real people.
5. If they look wrong, tap **They look too big** or **They look too small**. Each tap makes a small adjustment and can be undone.
6. When they look right, tap **They look right — add plants →**. The scale chip changes to "Scale set".
7. Optional: tap **Test growth**. It plants two sample shrubs, one near and one far, and plays the growth so you can check the scale. They are removed afterward.

The blue eye-level line

The blue line is eye level, the height of the camera. Drag it if it looks wrong. You usually do not need to touch it if you measure two things. If you move the line, things you measured keep their right size.

Tips

- If the shrubs look the same size in real life but different on screen, that is perspective: the near one looks bigger because it is closer.
- The scale chip shows "Scale: good", "Scale: okay" or "Scale: check it" once measurements exist.
- You can place plants as far back as you like. A tip appears if a spot is at or above the blue line, because it will look tiny.

If something goes wrong

- **"I couldn't find clear lines, so eye level is a starting guess."**: drag the blue line until the horizon of the house looks right, then check the yellow people or measure something yourself.
- **"That didn't fit your photo, so I kept the earlier scale"**: the object you confirmed did not match the picture. Measure something else.
- **"Using typical camera settings."**: no door or car was found (or you are not signed in). Check the yellow people, or measure something yourself.

Measure something to set the scale exactly

Tap the bottom and top of a door, garage door, fence, car or person and enter its real height for a more exact scale.

If "Set it up for me" is close but not exact, measure something in the photo whose real height you know. This is in **Photo setup → Scale**, in the section **Measure something yourself (more exact)**.

Steps

1. Open the **Scale** tab and expand **Measure something yourself (more exact)**.
2. Under **Tell me how big things are**, pick **What is it?** from the list: Front door, Garage door (7 ft), Garage door (8 ft), Privacy fence (6 ft), Car, Person, or Something else.
3. Under **How tall is it?**, type the real height in feet and inches, or drag the end of the tape measure. The two stay in sync. Doors and garage doors vary, so use the real height if you know it.
4. Tap **Tap its bottom and top**.
5. On the photo, tap the very bottom of the object (where it meets the ground), then the very top.
6. The object appears in the list with its height. A status chip shows **Scale: good**, **Scale: okay** or **Scale: check it**.

If you chose **Something else**, type what you are measuring (for example mailbox, gate, ladder) first.

With a signed-in account you can also tap ✨ **Find it for me** for a door, garage door, car or person. A dashed box appears for you to confirm with **Yes, use it** or **No**.

How it works

- One measured object sets the camera height.
- Two measured objects, one near and one far, also set the eye-level line.
- Moving the blue eye-level line afterward keeps your measured things the right size.

Rules the Designer applies

- The thing must be at least about 2 ft tall. Smaller things, such as a cobblestone, cannot set the scale.
- An object must be tall enough in the picture to count.
- A measurement that does not fit the others is refused or ignored with a reason. Your earlier scale is kept.
- The camera height is kept to a believable range.
- Each item in the list has a **Remove** button.

Tips

- Pick something upright and fully visible.
- Use one near and one far object for the best result.

If something goes wrong

- **"The bottom of it is above the blue eye-level line"**: tap its bottom again where it meets the ground, or drag the blue line up first.
- **"That is too small in the photo to measure well"**: measure something taller.
- **"None of your measurements could be used"**: measure something upright and at least 2 ft tall, then tap its bottom and its very top.
- Aerial views do not use this; they have a "Pixels per foot" slider.

Browse the plant and item library

Find plants and garden features in the Add tool, by category, and read each card.

The library holds the plants and garden features you can place. The readme describes it as 2,656 East Coast plants and 488 garden features, with common and scientific names, drawn at true scale. Counts can change in later versions.

Where to find it

- Inside a design: **Add → Plants & things** (key **P**).
- Outside a design: the home screen's **More tools → Plant & item library**.

Categories

Tap a chip under the search box: **Trees, Evergreens, Shrubs, Perennials, Grasses, Annuals, Vines, Features, My Library**.

- **Features** are things like benches, lighting and structures. They have group buttons such as Stone, Seating, Fire, Water, Lighting, Planters, Structures, Fences & Walls, Decor and Outdoor Living.
- **My Library** holds your own items made from photos. See Add your own item from a photo.

Reading a card

Each card shows a picture, the common name, the scientific name in italics, and a size line such as "10 ft × 8 ft" with growth in inches per year. Small tags show Native, Evergreen, Deer-resistant and, if flagged, an invasive note. If you have set a hardiness zone, a line such as "Likely to thrive here" or "Borderline here" appears. Tap the small **i** on a card for the full fact sheet.

Steps

1. Open **Add → Plants & things**.
2. Pick a category chip.
3. Scroll. Cards load as they come into view, 60 at a time. Tap the **Show … more** button at the bottom for the next batch.
4. Tap a card to start placing it, then tap the photo. See Place a plant.

The "Filters and more tools" section

Tap **Filters and more tools** to open the filters, a hint line, and two buttons: **Add my own item** and **Plant ID**. See Filter plants.

Tips

- Outside a design, tapping a card opens the fact sheet (or the edit window for your own item), because there is no photo to place on.
- With photo packs installed, cards use real photos. Without them, drawn plants are shown. See Library packs.

If something goes wrong

- **Cards show gray boxes**: thumbnails are drawn as you scroll. Wait a moment.
- **"No matches"**: clear filters or search a simpler word like "red", "shade" or "native".
- **A plant is missing**: if its photo was deleted from My Library, designs drop it.

Search the library, including by voice

Type or speak plant names, colors, light and more into the library search box, with typo-tolerant matching.

The search box at the top of the library looks across common names, scientific names, colors, light needs and more. The readme describes the matching as typo-tolerant.

Steps: type a search

1. Open **Add → Plants & things**.
2. Click the box that says "Search [number] plants & features".
3. Type one or more words, for example `hydrangea`, `red`, `shade` or `native`.
4. Results replace the category view. The count line shows "[n] results". The category chips are not highlighted while a search is active.
5. Results are ordered by how well they match, unless you chose another sort in the filters.
6. Clear the box to go back to the category you were browsing.

Steps: voice search

1. Tap the **microphone** button next to the search box (its label is "Search by voice"). The button is hidden if your browser has no speech recognition. The code says it works in Chrome, Edge and Safari.
2. Allow microphone access if asked. The box shows "Listening… say a plant, color or feature".
3. Speak, for example "show me purple flowers for shade".
4. VisionScaper drops filler words such as "show me", "find", "some", "the" and "plants", and searches with what is left. The search runs as you speak.
5. Tap the microphone again to stop.

Other searches that work the same way

- **Material search** in the ground materials picker ("Search [n] materials"), also with a microphone.
- **Design with AI** and the "Say what it is" box in the item maker have their own voice buttons.
- **My designs** has a search box by name or tag (typing only).

Tips

- Short words work best. "Red" and "shade" are the examples the app itself suggests.
- If you want a list narrowed by several traits, use Filters instead. See Filter plants.
- Searching covers My Library items too.

If something goes wrong

- **"Allow microphone access to search by voice."**: allow the microphone for the site in your browser settings.
- **"Didn't catch that — tap the mic and try again."**: speak closer or reduce background noise.
- **"Voice search needs an internet connection."**: connect and try again.
- **"Voice search isn't available in this browser."**: type instead.
- **"No matches."**: try fewer words.

Filter plants by goal, light, color, size and more

Use goal ideas and filter groups with live counts, sort the list, set a hardiness zone, and find the pet-safe and invasive labels.

Filters narrow the current category (or your search results). Every filter shows how many plants it would give before you tap it, and nothing is hidden unless you turn a filter on.

Steps

1. Open **Add → Plants & things**, then tap **Filters and more tools**.
2. Use **Sort**: A to Z, Tallest first, Shortest first, Widest first, or Fastest growing.
3. Open **Start with a goal** and tap one: Privacy screen, Beside the house, Front of the bed, Shady spot, Deer-resistant, Native garden, Year-round interest, Fall color, Spring flowers, Summer color, Fast growers, Colorful leaves, or Groundcover.
4. Open any group and tap options:

Group	Options
Evergreen or not	Evergreen, Drops its leaves
Shape	Upright & narrow, Pyramid & cone, Rounded & mounded, Arching & grassy, Weeping, Low & spreading, Bold leaves & clumps, Multi-stem, Climbing
Height / Width when grown	Under 3 ft, 3 to 15 ft, 15 to 40 ft, Over 40 ft / Under 2 ft, 2 to 5 ft, 5 to 10 ft, Over 10 ft
How fast it grows	Slow, Medium, Fast
Light	Full sun, Part shade, Shade
Flower color	color swatches
Blooms in	Jan to Dec
Fall color, Leaf color	color groups
Texture	Fine & feathery, Big bold leaves, Soft & fuzzy
Winter and extra interest	Berries, Colorful or peeling bark, Plumes & seed heads, and more
Good to know	Native, Deer-resistant

5. Tap **Clear [n] filters** to reset them.

Filters apply to plants only. Features (benches, lighting and so on) have group buttons instead.

Hardiness zone

Open **Hardiness zone**. Choose **My zone** or tap **Find my hardiness zone**. That helper offers a ZIP code lookup (U.S.) through an outside zone service, a "how cold do your winters get?" list, or "I already know it…". Once a zone is set, cards say whether a plant is likely to thrive, borderline, tender or may be too warm. The **Likely to thrive here** chip filters to those. Zones never hide a plant by themselves, and your zone is remembered on this device.

Pet safe and invasive labels

- A **Pet safe** chip is shown only if some plants in the library carry pet-safe data. In the bundled plant data checked for this manual, no plant is flagged, so you may not see the chip (not verified for pack or future data).
- An invasive note ("Can be invasive in [region]") appears on cards and fact sheets for plants flagged with regions such as the northeastern U.S., the Pacific Northwest, California, Australia or Europe. No bundled plant carries a flag in the data checked, so you may not see it yet (not verified for pack or future data).

Tips

- Filter counts update as you combine groups, so grayed options mean "zero plants".
- Combine a goal with a group, such as Deer-resistant and Full sun.

If something goes wrong

- **Too few results**: remove a filter or read "Clear [n] filters".
- **ZIP lookup fails**: use the winter list instead.

Read a plant fact sheet and growth chart

Open the i on a plant card to see four-season previews, facts like size, light, zones and deer resistance, and the height and width growth chart.

Every plant in the library has a fact sheet. It is the quickest way to learn how big a plant gets, when, and what it needs.

Open it

- In the library, tap the small **i** on a plant card (its tooltip says "Plant facts").
- With a plant selected in the picture, tap **All plant facts →**.
- Outside a design, tap a plant card in **Plant & item library**.

What it shows

Four seasons. Small pictures for Spring, Summer, Fall and Winter.

Facts. Rows appear when the data exists:

Row	Meaning
Mature size	Height and width when fully grown
Growth	Growth rate, usually inches per year
Time to mature size	About how many years (trees, evergreens, shrubs) or seasons; annuals say "one season"
Flowers	Bloom color and months
Fall color	If it has one
Berries / fruit	If it has them
Light	Full sun, part shade, shade
Hardiness zones	USDA zone range
In your zone	Only after you set a zone: likely to thrive, borderline, tender, too warm
Invasive	"Can be invasive in ..." with regions, when flagged
Foliage	Evergreen, Deciduous / dies back, or Annual, with leaf color
Deer	Resistant, or May be browsed

A short note about the plant may follow.

Growth chart

Growth from planting is a chart of height (green line) and width (yellow line). Trees and shrubs are shown in years from "Seed". Perennials and grasses show seasons from "Plant". Annuals show June to October.

When a plant is selected in a design, the same chart appears in the side panel under **Growth over time**. A white dot marks its size when planted and a green dot marks the year shown on the See it grow slider.

Steps: use it to choose a plant

1. Open the fact sheet.
2. Compare **Mature size** with the space you have. A 15-ft-wide shrub will not fit a 4-ft bed.
3. Check **Light** and **Hardiness zones**.
4. Tap **Place in my yard** to start placing it, then tap the photo.

Tips

- Use the chart with the **See it grow** slider: see Plant age and the See it grow slider.
- The text "In your zone" is information only. It never blocks you from placing a plant.
- Plants you identify with Plant ID that are not in the library get a growth profile; if no growth data exists the app says it will show the plant at a fixed size.

If something goes wrong

- **A row is missing**: that plant has no data for it.
- **No "In your zone" row**: set your zone in Filters → Hardiness zone.

Place a plant or feature in your yard

Pick a plant from the library and tap the photo to drop it at its real size, then place several at once.

Placing is a two-tap action: choose an item, then tap where it should go.

Before you start

- Set the scale first so plants are the right size. See Set the scale for me.
- Open **Add → Plants & things** (key **P**).

Steps

1. Tap a card in the library. A message says "Tap the photo to place [name]." On a computer it adds "Hold Shift to place several."
2. The panel shows "Placing: [name] — tap the photo" with a **Cancel** link.
3. Tap the photo where the plant's base should sit on the ground.
4. The plant appears at its usual nursery size and is selected. The side panel switches to that plant's controls, and the selection bar floats over it.
5. To place several in a row, hold **Shift** while tapping on a computer. The tool stays in placing mode.
6. Press **Esc** or **Cancel** to stop placing.

How big will it be?

A plant is drawn at the size it would be when bought and planted, called its **Size when planted**, shown with a nursery label such as Seedling, 1-gallon, 5-gallon, or a tree height. It grows from there as you slide **See it grow**. It is also drawn smaller farther away, following the perspective of your photo.

Placing near eye level

The blue eye-level line is the horizon. A spot at or above it will look tiny, because it is far away. A tip appears if you drag a plant there. If the yard really does go back that far, keep going.

Placing features

Features such as boulders, benches, fire pits and lighting keep their real size. A fire pit and lighting glow when you turn on night lighting. See Seasons, day and night.

Place a plant from its fact sheet

On the fact sheet, tap **Place in my yard**.

Tips

- Place bigger plants farther back and smaller ones toward the front.
- Use **Duplicate** to plant a group at the mature spread of that plant. See Move, resize, turn, flip and copy.

If something goes wrong

- **Nothing happens when you tap the photo**: you may be in a different tool. Tap the card again, or press **P**.
- **The plant is tiny or huge**: check the scale step.
- **The plant is not in the list any more**: items whose My Library asset was deleted are dropped from designs.

Move, resize, turn, flip and copy items

Change a placed plant or feature with drag handles, the nudge pad, size boxes, turn and flip buttons, group planting, blend and shadow controls.

Tap a placed plant or feature with the **Move** tool (key **V**) and its controls open in the side panel.

On the picture

- **Drag** the item to move it.
- Drag the **corner handle** to resize it.
- Drag the **round handle above** the item to turn it. It clicks into place when straight or square. Hold **Shift** for free turning.

In the side panel

Header. Name, scientific name and the size today (for example "In 5 years" or "Today"), plus size when fully grown.

Size when planted (plants only). A slider with nursery labels. See Plant age and the Time machine.

Move. A nudge pad with arrows (farther, closer, left, right) and a distance box (6", 1 ft or 3 ft). X and Y boxes give exact positions. On an aerial view the arrows move the item on the map.

Size. Smaller, Bigger and Usual size. Plants also get a **Height** box in feet, which sets how tall the plant is at the year on the See it grow slider. Features get **Exact size** as a percentage and **Real size**.

Turn & flip. Turn left 90°, Turn right 90°, A little left, A little right, Flip left ↔ right, Flip up ↕ down, Stand it straight, an Angle slider and a Set angle box.

Duplicate. Copy, facing the other way puts a mirrored copy beside it. Or set **How many** and **Spacing** and choose **In a row** or **Natural cluster**, then tap **Plant the group**. Spacing starts at the plant's mature spread.

Arrange (in front / behind). Bring to front, Bring forward, Send backward, Send to back.

Blend into the photo. Auto blend matches brightness, contrast, color, warmth and shadow to the photo around it. **Reset** undoes it. Open **Light & color** (Brightness, Contrast, Saturation, Warmth) and **Shadow** (Ground shadow on/off, Opacity, Length, Softness, and direction: Sun (scene), From left, From right).

Layer. A **Name** box, an **Opacity** slider, **Lock** and **Hide**.

Actions. ♡ **Save to board** (Inspiration Board), **Remove**, and ← **Done**.

Steps: plant a group

1. Select a plant.
2. Under **Duplicate**, set How many (2 to 25) and Spacing in feet.
3. Choose In a row or Natural cluster.
4. Tap **Plant the group**. A message says how many were planted, or "No room for more here — try a smaller spacing."

Tips

- Arrow keys nudge a selected item. See Keyboard shortcuts.
- Locked or hidden items can be unlocked or shown again in **Layers** (top bar).
- A plant's maximum size is its mature size. You will see "This plant usually tops out at [n] ft, so that is as big as it can get."

If something goes wrong

- **Cannot select an item**: it may be locked. Open Layers and unlock it.
- **Cannot make it smaller**: "It can't be smaller than a seedling that year." Move the Time slider back or choose a smaller nursery size.

The selection bar, selecting many items and layers

Use the floating bar to turn, flip, copy, remove or finish; select several items with a box; lock, hide and arrange things in Layers.

Whenever you select something, a small bar floats over the picture so the common actions are one tap away.

The selection bar

With one plant or feature selected, the bar shows:

- **Turn** (left), **Turn** (right): each turns 15 degrees.
- **Flip**: faces it the other way.
- **Copy**: makes a copy beside it, facing the other way.
- **Remove**: takes it out of the picture.
- A big green **Done** button that deselects everything.

If the item is locked the bar shows "Locked" and **Done** only. With several items selected, it shows **Copy** and **Remove**. With a bed or patio selected it shows **Remove**. On a small screen the bar sits pinned at the bottom.

Tapping empty space or pressing **Esc** also deselects.

Steps: select many

1. Use the **Move** tool.
2. Drag a box on an empty part of the picture to select everything inside it. Or **Shift-click** items to add or remove them one by one.
3. The panel says "[n] items selected" and tells you the count of plants/features and shapes.
4. Drag any selected item to move them all together. Arrow keys nudge them (hold Shift to go farther).
5. Tap **Duplicate all**, **Delete all** or **Clear selection**.
6. If the view has more than one layer, tap a layer name under **Move to layer** to move the selected items there.

On touch screens, the Move panel has a checkbox: "On touch screens: one-finger drag selects (instead of panning)".

You can also right-click (or long-press) an item to get a menu with **Select this item's pixels**, **Select similar items**, **Duplicate** and **Delete**. **Select similar items** selects every placed copy of the same plant.

Layers

Tap **Layers** in the top bar. The window lets you design in layers such as "Existing", "Phase 1" and "Lighting".

- **+ Add a layer** and name it. New things go on the active layer, marked with a dot.
- For each layer: show or hide (eye), lock, rename, move up or down, delete (its items are kept).
- Below that, the photo (Hold for original), ground shapes, plants and features grouped by type, and measurements. Each row can be shown, hidden, locked, renamed, moved forward or back, or removed. Use the drop-down on a row to move it to another layer.

Tips

- Hide a layer to compare plans.
- Lock finished items so you do not move them by accident.

If something goes wrong

- **The bar does not appear**: it shows only with the Move or Add tool.
- **An item will not select**: unlock it in Layers.
- **Dragging pans instead of selecting on a touch screen**: switch on the one-finger select checkbox.

Plant age and the See it grow slider

Choose how big a plant is when planted, then drag See it grow or press Play to watch the yard mature year by year.

The readme calls this the Time machine. On screen it is the **See it grow** slider under the picture. It uses each plant's real growth data, so you can see whether a shrub will crowd a window or path.

Steps: set the size when planted

1. Select a plant in the picture.
2. In the side panel find **Size when planted**.
3. Drag the slider. The label shows a nursery size and height, such as "5-gallon · 3 ft tall". Trees use labels like Seedling, 1-gallon, 5-gallon, 6-ft tree, 10-ft tree and 12-ft+ tree. Shrubs and perennials use Seedling through 7-gallon+.
4. You can also type a **Height** in feet. This sets how tall it is at the year shown on the slider, and it keeps growing the way that plant really grows afterward.

Steps: watch it grow

1. Drag **See it grow** to the right. The label reads "Today" at 0 and then "In 5 yrs (2031)" style text.
2. Press the **Play** button to animate. It advances about 3 years each second and stops at the end. Press it again to stop. Play starts over from year 0 if the slider is already at the end.
3. Press **Fully grown** to jump to the year when everything you placed is nearly full size.
4. Watch the growth chart in the side panel: the green dot moves along the height curve.

The slider is always at least 30 years long, and gets longer (up to 60) when you place slow growers. Tick marks show 0, 1, 5, 10, 20, 30, 40, 50 and 60 years.

How sizes work

- Width and height follow the plant's own curve. Perennials fill in over seasons. Annuals reach their size within one season.
- A plant cannot be bigger than its mature size or smaller than a seedling.
- When you resize a plant it sets a real height in feet, not a hidden multiplier. Older designs with hidden multipliers are converted when opened.

Tips

- Plant at the size you would actually buy, then slide time forward to check spacing at maturity.
- Use **Test growth** in the Scale tab to check the scale with two sample shrubs.
- Years-from-now and season are saved with the design.

If something goes wrong

- **"This plant usually tops out at [n] ft"**: it is already at its maximum size.
- **"It can't be smaller than a seedling that year"**: move the Time slider back.
- **Play does nothing**: it may already be running; the button shows pause.

Seasons, day and night, and sun direction

Switch between Peak look and the four seasons, turn on night lighting, flip the sun, and hold a button to compare with the original photo.

The scene bar under the picture controls how the whole design looks: which season, day or night, which way the sun lights painted ground, and whether you are looking at the original photo.

Seasons

Tap one of the season buttons:

- **Peak look**: each plant is shown in the season it looks its best. (Tooltip: "Peak look: each plant in the season it looks its best".) New designs start on Peak look.
- **Spring, Summer, Fall, Winter**: every plant shows that season. Blooms appear only in a plant's bloom months, fall color appears where the plant has it, and winter shows bare branches on deciduous plants.

Photo-based plants (from a Library pack or your own photos) keep their real growth data and are re-colored for the season. If a plant has real seasonal photos, those are used.

Day and night

1. Tap the **moon** button ("Toggle night lighting"), or press **N**.
2. The scene darkens. Features with a built-in light, such as lighting fixtures and a fire pit, glow. Place them from Add → Plants & things → Features → Lighting or Fire.
3. Tap the button (now a sun) to go back to day.

Flip sunlight direction

The **sun** button ("Flip sunlight direction") turns the lighting around. It affects the 3D relief on painted ground materials, so stone, brick joints, gravel and mulch are shaded from the other side. This is useful when the shadows in your photo fall the other way. See Paint ground materials.

Hold to see the original

Press and hold the **eye** button ("Hold to see the original photo") to see the photo as it was before your changes. Let go to return.

Steps: compare a plan at two times

1. Set **Peak look** and a year with See it grow.
2. Save a design version (More menu → Design versions & notes).
3. Switch to Winter, or turn on night, and save another version.
4. Use **Compare designs** to slide between them.

Tips

- Season, years and night are saved with the design and used when you save a picture, print or share.
- Design with AI can do this for you: ideas such as "Show it in fall" and "Show it at dusk with lights" set the season and night for free; they do not change the photo itself.
- A photo-real look needs the AI "restyle" step, which uses credits. See Design with AI.

If something goes wrong

- **Nothing seems to change when you pick Winter**: a plant only changes if it has seasonal data. Check its fact sheet for fall color and bloom months.
- **No glow at night**: only features marked as lights glow.
- **The sun button does nothing visible**: it changes the relief shading of painted ground, so you need painted ground and the 3D depth slider above zero (not verified for every material).

Paint mulch, stone, lawn and pavers on the ground

Brush a material onto the photo, with brush size, softness, opacity, perspective, 3D depth and photo-shadow sliders.

The brush paints a ground material straight onto the photo. Textures shrink into the distance and pick up real shadows from your photo.

Where to find it

Add → Mulch, stone & lawn (key **B**). A button at the top, "Add a bed, lawn, patio or path", opens the guided Add an area wizard.

Steps

1. Under **Brush**, choose a mode: **Paint**, **Undo paint** (rubs out paint you added) or **Show original** (brushes the original photo back, which also reverses erasing and AI changes in just that spot).
2. Set **Brush size** with the slider, or use the **Smaller** and **Bigger** buttons.
3. Choose **Sharp edge** or **Blended edge**. For a blended edge a **Softness** slider appears.
4. Set **Opacity** if you want to see the photo through the paint.
5. Pick a material in the **Material** list. Search it ("Search [n] materials"), speak into the microphone, or tap a group chip: Mulch, Stone & Gravel, Soil & Sand, Lawn & Groundcover, Pavers, Natural Stone, Tile & Marble, Wood & Decking, Decking & Surfaces.
6. Drag across the ground in the photo.

The three realism sliders

Slider	What it does	Default
Photo shadows on painted ground	How much of the photo's own shade the new material picks up. Set 0% for an even look, raise it to match the photo	30%
3D depth of painted ground	Reads each material's light and dark areas as relief: shaded pits and lit edges	60%
Perspective of painted ground	How strongly the texture shrinks into the distance. Turn it down if a material looks stretched	100% when the scale is verified (phone tilt or a measured object), 80% otherwise

The sun button in the scene bar flips the lighting direction of the relief.

Tips

- Paint with a big brush first, then use a small blended edge to tidy the border.
- For clean shapes, use Draw beds, patios and edging instead of freehand painting.
- Painted areas are listed in **Layers → Ground shapes** and can be hidden or removed.
- After an Erase & fill or AI change, brush **Show original** to bring back the true photo in one place.

If something goes wrong

- **Paint looks streaky or collapses toward the horizon**: lower the Perspective slider. Version 2.51.0 fixed streaking on photos that are not the built-in samples.
- **Stone looks flat**: raise the 3D depth slider, or flip the sun.
- **Material looks too dark**: lower Photo shadows.
- **The brush paints outside the lawn**: use **Undo paint**, or press Ctrl+Z.

Draw beds, patios, lawns, walkways, walls and edging

Outline a shape on the ground, fill it with a material, add edging, and reshape it later with draggable dots.

The **Draw beds & patios** tab makes clean, editable shapes that follow the perspective of your photo.

Where to find it

Add → Draw beds & patios (key **L**).

Pick a shape

Under **Landscape shapes** choose one: **Planting bed, Patio, Lawn, Walkway, Retaining wall** or **Edging**. A line of help appears. For example:

- Bed: tap around the bed. A big Start point appears. Tap it again to close the loop. Each loop gets a name (Bed 1, Bed 2 and so on).
- Patio: tap the corners, or switch on Rectangle and drag one on the ground.
- Walkway: tap along the middle, from one end to the other. It keeps a true width and narrows into the distance.
- Retaining wall: tap along the bottom of the wall. Set its height; it rises straight up.
- Edging: tap along the edge line.

Steps: draw a bed

1. Choose **Planting bed** and pick a material in **Materials: pick one to fill with**.
2. Under **How do you want to outline it?** pick **Curved edges**, **Straight edges** or **Rectangle**.
3. Tap points around the area. The status says how many points are placed.
4. Close the loop by tapping the big Start point, or tap **Close loop**. Double-tap also finishes.
5. White dots appear. Drag one to fix the edge. See Outline modes and fine-tuning.
6. Choose **Border / edging**: None, Metal, Plastic, Stone or Brick. (Lawn and Retaining wall do not offer edging. For the Edging shape the type is Metal, Plastic, Stone or Brick.)

Use **Back 1 point** (or Backspace) to take back a point, **Clear** (or Esc) to start over, and Enter to finish.

Fill shapes

A section called **Fill your shapes** appears once loops exist:

- Tap a shape on the photo to fill it with the selected material. A button toggles "Tap a shape to fill it (on/off)". Turn it off to draw a new shape inside an existing one.
- **Fill all [n] with [material]** fills every shape.
- Each shape in the list has **Fill**, **Rename** and **Edit** buttons and shows its area in square feet (with ≈ on photos).
- Tick **Draw outlines first, choose materials later** to outline several shapes before picking materials.

Change a shape later

Use the **Move** tool and tap the shape. The panel offers Curved or Straight edges, Border / edging, Material, Smaller and Bigger, Opacity, Duplicate, On top, Below and Remove. For a walkway there is a Width slider. For a wall there are Height and **Cap stones on top**. A bed's area is shown, such as "≈ 120 sq ft".

Tips

- Draw a planting bed behind a retaining wall for a raised planting area.
- Measurements on photos are estimates marked ≈. On an aerial view they are accurate.
- The Shadows, 3D depth and Perspective sliders are here too.

If something goes wrong

- **A tap fills a shape instead of starting a new one**: switch tap-to-fill off.
- **"Close loop" is disabled**: you need at least 3 points (2 for a line shape).
- **The shape looks wrong**: lower the Perspective slider or drag the dots.

The Add an area wizard

Cover part of the photo with any material in three steps: choose where, choose what, then swap or fine-tune in place.

Add an area walks you through putting a new bed, lawn, patio or path onto the photo. It makes the same live, editable shape as the Draw beds & patios tool, with perspective, shadows and undo.

Where to find it

Inside the Add tool, at the top of **Plants & things**, **Mulch, stone & lawn** and **Draw beds & patios**, tap 🧱 **Add an area** under "Add a bed, lawn, patio or path".

Step 1: Where?

The question is "Where do you want to add something?" Pick one:

- **Find the bed for me**: VisionScaper outlines the bed that is already in the photo. It accepts a bed only when it is confident the bed is mulch. For other beds, if you are signed in and the online helper is available, it asks the helper to outline a raised garden bed or garden bed. If it cannot, it says "I couldn't find the edge of that bed by myself. Outline it yourself: tap around it." You then confirm with "Is this the area?" and **Yes, that's the area**.
- **Curved edges**: tap around it; the outline curves smoothly.
- **Straight edges**: tap each corner.
- **Rectangle**: press and drag one box across the area.

See Outline modes and fine-tuning for dragging dots.

Step 2: What?

"What should go there?" You see the full materials browser, with **Popular** first (dark brown, black, red and cedar mulch, lawn, sod, soil, topsoil, pea gravel and river stone), a search box ("Search [n] materials") and group chips: Mulch, Stone & Gravel, Soil & Sand, Lawn & Groundcover, Pavers, Natural Stone, Tile & Marble, Wood & Decking, Decking & Surfaces. Tap any material.

Step 3: See it in the photo

The area appears at once, named Bed 1, Patio 1 and so on, and a bar shows under the picture:

- **Looks good**: keep it.
- **Try another material**: pick again without redrawing.
- **Start the area over**: removes it and goes back to Step 1.
- ✋ **Fine-tune the edges**: drag, add and remove dots.
- **Edging**: None, Steel, Stone, Brick.

The wizard decides if it is a lawn, patio or bed by the material's group (lawn and groundcover; pavers, natural stone, tile and wood; everything else a bed). A message says "Added. If you change your mind, press Undo."

Tips

- It is one undo step.
- Afterward, tap the shape with the Move tool to change it, as described in Draw beds, patios and edging.

If something goes wrong

- **"That outline was too small. Try again."**: place at least 3 points.
- **Find the bed does not find a raised bed**: outline it yourself.
- **The material looks stretched**: lower the Perspective slider in the Brush panel.

Outline modes and fine-tuning edges

Use Curved edges, Straight edges or Rectangle to outline an area, then drag white dots, add teal plus dots, remove points and undo.

One outlining tool is shared by the Add an area wizard, Clear an area, Draw beds & patios and Erase & fill (since version 2.50.0). Learn it once and it works everywhere.

The three modes

Mode	How
〰 Curved edges	Tap around the area one point at a time. The outline curves smoothly.
📐 Straight edges	Tap each corner. Straight lines in between.
▭ Rectangle	Press on one corner, drag to the opposite corner and let go.

You can switch mode with the buttons at the top of the picker.

Steps: outline an area

1. Tap the photo to place the first point (a green dot labeled 1).
2. Keep tapping around the area. Points are numbered. The hint tells you how many more you need ("Good. Keep tapping around the area (2 more to go).").
3. When you are back at the start, tap the green ✓ dot, or press **Finish outline**. The button reads "Place at least 3 points" until you have three.
4. The area is shaded.

Steps: fine-tune after you finish

1. **Drag a white dot** to move that part of the edge.
2. **Tap a teal "+"** between two dots to add a new dot, then drag it where you want the edge.
3. **Remove a point**: tap a dot, then press × **Remove point** (you need at least 3 dots left). With a finished shape selected in the Move tool, you can also double-click a dot to remove it.
4. ↶ **Undo** steps back. The picker keeps about 60 steps.
5. ⟲ **Start over** clears the outline.
6. Press the confirm button ("Continue", "Looks right", "Yes, that's the area" or "Save the new shape", depending on where you are).

After you finish a bed or patio in the Draw tool, the same dots are available: a section called **Fine-tune what you just drew** has **Remove point**, **Undo** and **Done**. Later, select the shape with the Move tool to get the dots back.

Changing mode on a finished outline just changes how the edges look (curved or straight).

Tips

- On curved edges, place more points on tight bends and fewer on long gentle lines.
- On photos, outline the part on the ground. The shape follows the perspective.
- Hold Shift when using the Erase & fill Straight edges mode to keep 45 degree angles.

If something goes wrong

- **Press and drag does nothing in Rectangle mode**: press on one corner, drag across, then let go. "Press on one corner and drag across to the opposite corner, then let go."
- **A dot cannot be removed**: an outline needs at least 3 dots.
- **Dots are too small to hit on a phone**: zoom the picture first.

Clear an area (Blank canvas) and remove weeds

Replace weeds, old plants and clutter in a bed or lawn with clean mulch, lawn or soil, or pick just the weeds to remove.

Clear an area turns a messy bed or lawn into a clean blank area you can design on. Weeds, old plants and clutter all go. It runs in your browser: the readme says no cloud call and no cost.

Where to find it

Erase & fill (key **W**) opens a guided screen the first time in a session. Otherwise use the buttons at the top of the panel: 🧹 **Clear an area (weeds, plants, clutter)**, 🌳 **Remove a plant** and 🗑️ **Remove something else**. The **Remove it** tab also has **Clear weeds from a bed**.

Steps: clear an area

1. On "What would you like to do?" tap **Clear an area**.
2. "Which part do you want to clear?" Choose **Find the bed for me** (best for a mulch bed), **Curved edges**, **Straight edges** or **Rectangle**. Include the weeds. Leave out anything you want to keep.
3. If it found the area, "Is this the area you want cleared?" shows it in blue. Drag a white dot or tap a "+" to fix it, then **Yes, clear it**. You can also choose **Just part of it — I'll outline it**, **It missed some — add more** or **It has too much — leave a part out**.
4. "What should this area become?" Pick **Mulch bed**, **Lawn** or **Soil**. One is marked **My best guess**. A raised bed full of weeds can look like a lawn, so it may guess wrong. You can change it afterward.
5. "Here it is. Slide to compare." Drag the slider between Before and After.
6. Tap **Looks good — keep it**, or **Not quite**.

Everything inside the outline is replaced with clean mulch copied from the same photo, or a library mulch or lawn when the photo has too little clean ground. Plants you placed in the Designer are protected.

If "Not quite"

Pick what looks wrong:

- Some weeds or green are still there (then you add more to the area).
- It's the wrong kind of ground (should be lawn, mulch or soil).
- The color or look isn't right.
- It cleared something that should stay (then you leave a part out).
- The edges are wrong, so you draw the area.

"What should this area be?" shows looks to try: **Match my photo** (mulch only) or library looks such as dark brown, black, red, cedar or cypress mulch; lawn looks; soil looks (topsoil, soil, compost, bare dirt). No redrawing is needed.

Steps: find and remove only the weeds in a bed

Use this when the bed is mostly fine and you want to take out the weed patches.

1. Open **Erase & fill**, then the **Remove it** tab. Find **Clear weeds from a bed**.
2. Tap the mulch or soil of the bed so VisionScaper knows where to look.
3. Choose how thorough to be: **Only obvious**, **Most weeds** or **Everything green**.
4. Press **Find weeds**. The message says how many weed patches it found ("Found 4 weed patches. Check them, then press Remove it. Paint off anything that is a real plant.").
5. Fix the highlight with **Fix the selection with a brush**: **Paint on** adds, **Paint off** takes away.
6. Press **Remove it**. Plants you added in the Designer are never touched.

Messages you may see: "First tap the mulch or soil of the bed so I know where to look." and "No weeds found in that bed. Try "Everything green", or tap a different part of the bed."

Tips

- The result is one Undo step.
- Other ways to handle a spot: **Mark it "to be cleared"** (draws a red box on the photo) or **Ask a landscaper to clear it**.

If something goes wrong

- **No edge found**: "I couldn't find the edge of that bed by myself." Outline it yourself.

- **Result looks smudged**: choose Not quite and a different look.

Remove something from your photo

Take a bush, bin, hose or weeds out of the photo with the guided Remove screens or the Remove it tab.

You can take things out of the photo so your new design has room. There are two ways: the guided screens and the manual Remove it tab.

Before you start

- Open the **Erase & fill** tool (key W).
- The guided screens need an online helper to outline objects. Without sign-in or the helper, VisionScaper falls back to colour-based tapping.
- Credit use for guided removal is not verified in code. The credits window lists "AI Erase" as using 1 credit (placeholder, not approved), but the removal screens show no credit prompt. Check the credits pill in your own account.
- The first time you open Erase & fill in a session with nothing selected, the guided screens open by themselves.

Steps: guided removal

1. Open **Erase & fill**. The first screen asks "What would you like to do?" with two cards: **Clear an area** and **Take out one thing**.
2. Choose **Take out one thing**.
3. Tap the item in the photo, or type its name. Suggestion chips include Shrubs & bushes, Weeds, Trash & recycling bins and Garden hose.
4. Check the red outline. Use **It missed some** (then tap the missed part) or **It has too much** (then tap the part that should stay). **Start over** clears the outline. The link "I'd rather pick the spot myself" closes the guided screens.
5. If you chose a plant, you are asked "Take out one plant, or clear the whole area?" with **Just this plant** or **Clear the whole area**.
6. Press **Yes, take it out**. A working screen says it takes about 10 seconds.
7. The result screen says "Here it is. Slide to compare." with Before and After labels and a slider.
8. Press **Looks good — keep it**, or **Not quite** and pick why.

If the result is not right

You get up to three tries. After **Not quite** you see "What looks wrong?" Choose a reason:

Reason	What it does
Part of it is still there	Tries again on what was missed
It looks blurry or fake	Tries another fill
It took away too much	Tries a tighter outline
Something else looks wrong	Lets you describe it

After the third try the screen says "I couldn't get this one perfectly clean." You can then choose **Cover it with mulch**, **Cover it with grass**, mark it "to be removed", or **Ask a landscaper to remove it** (the cover and mark options appear only when a spot is selected). The same choices are under **Show me other ways to handle it**. If the online helper is busy, a basic fill is used and a note tells you so.

Steps: the Remove it tab

1. In Erase & fill, switch to the **Remove it** sub-tab (key E). The other sub-tab is **Pick the spot**. Tap what you want gone, such as an old shrub, a stump or a hose. Shift-tap adds more.
2. Under **Select by**, choose **Just this** or **Everything like this**. The second one finds all similar areas, which is the Magic erase.
3. Use **Grow the edges** or **Fix the selection with a brush** to correct the outline.
4. Press **Remove it**.
5. To cover the gap, use **Cover it with mulch, lawn or stone**, with **Soften the edge** if you want a gentler blend.

Tips

- Weeds: **Clear weeds from a bed** has three levels: Only obvious, Most weeds, Everything green. Tap the mulch or soil of the bed, press **Find weeds**, check the highlighted spots, paint off any that are real plants (**Paint off**), then press **Remove it**. Plants you added are never touched.
- **Everything like this** is good for dandelions and stones. **Just this** grows out from your tap through similar colour.
- After a removal the Remove it tab says "Removed! Not perfect? Undo, adjust the selection and try again." Press Ctrl+Z to bring the item back.
- Small, clearly outlined items work best. Take one item at a time.

If something goes wrong

- "That's a lot of removing today! Try again tomorrow." You reached the daily limit for the online fill. The code default is 80 a day per visitor (a placeholder, not approved). Wait, or try the Remove it tab (whether it uses the same online fill is not verified).
- The outline picks the wrong thing: use Pick the spot tools.
- The fill looks fake: go back one step and try a smaller selection.

Pick the spot: selection tools

Choose exactly what to change with curved, straight, rectangle and smarter selection modes, then use it for removing or planting areas.

Pick the spot is the first sub-tab of the Erase & fill tool (key W). It lets you mark an area of the photo, then use it for removal, a new bed, a patio and more.

Steps

1. Open **Erase & fill**, then **Pick the spot**.
2. Choose a mode. Three are shown up front: - **Curved edges**: click around the shape; the line bends smoothly. - **Straight edges**: click corners; lines are straight. - **Rectangle**: drag a box.
3. Close the shape. A highlight shows what is selected, and a status line reads "Highlighted N% of the photo". Straight edges: Shift keeps 45-degree angles. Enter or a double-click finishes a shape; Esc cancels.
4. For more control, open **More ways to select**: Object, Same color, Snap to edge, Hug the edge, Oval and Touch-up brush. Each mode adds its own sliders, such as **Color match**, **Brush size**, **Edge search width**, a **Preview before applying** box, and **Soften new selections**.
5. Fix the edges (see below), then choose what to do with it.
6. You can also right-click or long-press the photo for a menu of things that make sense at that spot.

Combine selections

Choice	Shortcut	Result
Start over		Replaces the selection
+ Add to	Shift	Adds the new shape
– Take away	Alt	Cuts the new shape out
∩ Only the overlap	Shift+Alt	Keeps just the shared part

Refine the edge

- Type a name in the select-by-name box (hint: shrubs, weeds, lawn, mulch, patio) and press **Find**. You must be signed in, and the online finder must be switched on; otherwise you get a message telling you to outline it instead.
- Buttons: **All**, **Invert**, **Deselect**.
- Tools under **Refine**: Grow, Shrink, Expand 4px, Contract 4px, Smooth, Feather 6px, Fill holes, Edit points, Similar, touching, Similar, everywhere. A check box, "Feather follows edges", softens foliage and keeps hard edges crisp.
- **Edit points**: drag a white dot, tap a teal + to add a dot, tap a dot and press **Remove point**, then **Looks right**.
- **Refine edge automatically** snaps the line to the real edge.
- Uncertain edges can show in red.

Use the selection as...

This menu turns the selection into: Lawn area, Planting bed, Patio, Outline zone, Measure it, Remove it, Edit with AI, Copy cut-out, or **Fill with a material**.

Save and view

- Save a selection and later **Load** it, add (+) or subtract (–) it, or delete it.
- View modes: Tint, Mask, Only, Outside, Ants. You can change the highlight colour and strength.
- Keys while selecting: Ctrl+A all, Ctrl+Shift+I invert, Ctrl+D deselect, 1-9 switch mode (in the order Curved, Straight, Rectangle, Object, Same color, Snap to edge, Hug the edge, Oval, Touch-up brush), [and] brush size, Delete or Backspace removes the highlighted area (the same as **Remove it**).

Tips

- Zoom in before outlining. Small errors show at the edge.
- Use Same color for a flat lawn; use Snap to edge near fences.
- Smart, Paint it and Outline it modes exist in code but are hidden in this version.
- Save a selection you will reuse, such as "front lawn" or "old shrubs".

If something goes wrong

- The highlight spills over: choose **Take away** and click the spill, or Shrink.

- Holes inside: **Fill holes**.
- Nothing happens on Delete: make sure a selection exists. The panel says "Nothing highlighted yet" when there is none.
- **Find** does nothing useful: sign in, or outline it by hand.

Add your own item from a photo

Photograph a plant or feature, cut it out, and save it to My Library so you can place it in any design.

Missing something in the library? Make your own item from a photo. It lands in **My Library**, the last category in the library list. You can use it in any design on this device.

Before you start

- Photograph the whole item from the ground to the top. Shoot from the side at about waist height, not from above.
- A plain background (sky, lawn, a wall) gives the cleanest cut-out.
- For plants, photograph them in bloom if you can. The window says flowers are hidden out of season.
- The optional **Find it by name (free)** helper in the cut-out step is only offered when you pull an item out of an existing photo, and it needs the online helper to be switched on (not verified for every setup).

Steps

1. Open the **Add** tool (key P), then **Plants & things**. Press **Add my own item**. (The home screen also has an **Add My Own Item** tile.)
2. A small window offers **Photograph it** and **Cut it out of a photo**. Pick one.
3. Step 1 of 3, **Photo**: **Take a photo** or **Choose a photo**. For an existing picture you can also use **From my designs**.
4. Step 2 of 3, **Cut out**: use the four tools. **Keep** brushes over parts that got cut off. **Remove** brushes over background still showing. **Box** drags a box tightly around the thing. **Ground** drags to where it meets the ground; everything below is removed. Tick **Preview on checkerboard** to check your work, and use the brush size slider.
5. Step 3 of 3, **Details**: choose what kind of thing it is, then search the library or type a name in "What is it?". Pick a match and your photo grows, blooms and changes colour using that plant's data. Type a name under **Name in your library**.
6. If you linked a plant, keep **Grow it over time like a real** (plant name) ticked. Untick it and you set **How tall is it?** yourself.
7. Press **Save to My Library**. Place it like any other item.

Tips

- Zoom and take your time with Keep and Remove. Clean edges look best.
- Link to a library plant whenever you can. An item you give a fixed height does not change size with See it grow.
- Tick "The photo shows flowers" if it does, so the flowers are hidden out of season.
- To change an item later, open it from My Library. You can **Redo cut-out** (if the original photo was kept), **Save changes**, or **Delete**. Deleting also removes copies placed in your designs.
- Site owners see **Download for website** on an item. It saves the cut-out so you can upload it in WordPress under Settings, VisionScaper, Library photos (see Library packs).
- My Library items are kept in your browser storage on this device (IndexedDB). A storage size limit and a storage meter in this window are not verified in code.

If something goes wrong

- "That photo couldn't be opened. Try a JPG or PNG." Use another picture.
- Parts of the background stay: paint more with **Remove**.
- Part of the item vanished: paint **Keep** over it.
- "Give it a name so you can find it later." Type a name before saving.
- "Couldn't save — your browser storage may be full." Delete items you no longer use.
- Find it by name finds nothing: drag a **Box** around it instead.

Library packs and the Materials pack

Site owners install photo and material packs in WordPress so the Designer shows real plant photos and more ground materials.

Packs are zip files that add real photos and ground materials to the Designer. Only the site owner installs them, in WordPress.

What is in the box

- The readme says the Designer ships with 121 drawn ground materials and that the Materials pack adds 839 photo-scanned ones. Counts can change between versions.
- Packs load only when a customer uses an item, so your pages stay fast.
- Material groups: Mulch, Stone & Gravel, Soil & Sand, Lawn & Groundcover, Pavers, Natural Stone, Tile & Marble, Wood & Decking, Decking & Surfaces.
- A pack holds a `photos/` folder (plant and feature cut-outs, named like `id.webp` or `id.fall.webp`), a `materials/` folder (images plus `materials.json`), or both.

Steps: install a pack

1. In WordPress go to **Settings → VisionScaper**.
2. Scroll to **Library packs**.
3. Choose your file (the file box accepts .zip, .tar, .tgz and .gz) and press **Install pack**. Install one file at a time.
4. The page then reads "Installed now: N ground materials (textures) · N library plants & features with real photos".
5. Clear your page cache, then refresh the Designer.

Steps: add photos for one item

1. In the Designer, make the item with **Add my own item** and link it to a library plant (see Add your own item). Open it with the pencil button and press **Download for website** (shown to site owners).
2. In Settings → VisionScaper, find **Library photos**. Choose the downloaded file (names are the library ID, for example hydrangea.webp) and press **Upload photos**. Seasonal pictures end in .fall.webp or .winter.webp. Use transparent WebP or PNG under 3 MB.
3. If you copied photos in by FTP instead, press **Rebuild photo list** once.
4. The page lists your photo files, with a **Find** box. Tick any file and press Upload photos to delete it.

Tips

- Keep a copy of the original zip.
- Large packs may exceed your host's upload limit. Ask the host to raise the limit to 64 MB, or install by FTP into wp-content/uploads/dreamscaper-photos (the screen's own advice).
- Installed materials appear in the **Mulch, stone & lawn** tab of the Add tool (key B) after a page refresh. See Paint ground materials.
- The Settings page also warns: if you use a page-cache plugin, clear its cache once after installing.
- The Settings page is under WordPress Settings, VisionScaper. You need an administrator account (not verified beyond the menu rule).

If something goes wrong

- Upload fails right away: the upload limit is too small. Use the FTP route.
- A photo is skipped: the screen lists skipped names and reminds you to use names like hydrangea.webp, under 3 MB.
- New photos do not show: clear page cache and hard refresh; then check the Installed now line.
- The count did not change: check the folder names are exactly photos/ and materials/.

Design with AI

Describe a change, review the plan, and let AI redesign, restyle, replace or remove items in your photo.

The **Ask AI** tool (key A) opens a panel called **Design with AI**. You describe a change in plain words. VisionScaper shows a plan first, then does it when you say so.

Before you start

- You must be signed in. Signed out, the panel shows "Sign in to use Design with AI — it's free." If the site owner has not set AI up, it says it is "being set up and will be available soon."
- Planning is free ("Working out a plan... (free)"). The review screen then tells you the cost, such as "This uses 1 credit." or "This uses no credits."
- In the code, the paid actions are remove, replace and restyle, one credit each. The credit amounts are placeholders, not approved.
- The credits pill reads "N AI credits" (admins see "AI: unlimited"). Tap it for free-left-today, purchased credits and what is ready to use.
- The site owner sets a daily allowance in Settings, VisionScaper, **AI image generations per customer per day**. The default is 10 (a placeholder, not approved). The owner can enter 0 to 500.

Steps: guided mode

Guided mode pops up the first time you use the panel. The **Guided** switch turns it on or off. It counts "Step 1 of 6" (five when you pick the seasons option, which skips "Where?"). 1. **What do you want to do?** Choose **Redesign my yard**, **Change one thing**, **Remove something**, or **See it realistic or another time**. Remove something opens the guided removal screens instead; see Remove something. 2. **Where?** Choose **Whole yard**, or **Pick an area** (or **Use the selected area** if you already outlined one). 3. **Tell me more.** Type, tap one of the idea chips, or use the microphone ("Say it instead"). Press **Next**. 4. **What should stay the same?** Switch on any of: house, driveway, camera angle, plants I placed, fence. The house, driveway and camera angle are on by default. Press **Show me the plan**. 5. **Check and go.** Read "Here's what I understood", the list of steps and the cost. Press **Do it** (it shows the credits) or **Change it**. 6. **Your result.** Press **Accept**, **Try again** or **Undo**. "Anything else? Accept this, then tell me the next change."

Tips

- If the AI cannot tell what you mean it may ask a question with up to four answer chips. Pick one.
- If the plan skips something it says "I'll skip:" with the reason.
- AI pictures carry the label "Concept picture – not a build-ready plan". Tell customers.
- Plain descriptions work best, such as "gravel path with lavender".
- Provider keys are set by the site owner in Settings. Follow the provider's current instructions.

If something goes wrong

- "I still can't tell what to change": say it another way, or select the area first.
- Not enough credits: the app offers to get more credits. Free credits refill each day.
- "Slow down a little — try again in a few minutes." You hit a short-term limit (the code default is 60 an hour; placeholder).
- Result is wrong: **Try again**, **Undo**, or Ctrl+Z.
- Scene pictures have their own daily limit (60 a day per the changelog; a code default).

Identify a plant from a photo

Use Plant ID to name a plant from its picture, see look-alikes and warnings, and save it to My Library.

Plant ID names a plant from a photo, shows how it grows, and can save it to My Library. The first screen says "Identifying is always free." and "Plant ID is for plants only."

Before you start

- You must be signed in (free). The window offers to sign you in when you press a photo button.
- The site owner turns Plant ID on by adding a key in Settings, VisionScaper. The code supports a **Pl@ntNet API key** for plants and a fal.ai key as a fallback. Until a key is added the window says "Plant ID is being set up and will be available soon." Follow the provider's current instructions to get a key.

Steps

1. In the Add tool (key P), press **Plant ID** (next to **Add my own item**).
2. Choose the part you will photograph: **Whole plant**, **Leaf**, **Flower**, **Fruit / berry** or **Bark**. A flower or single leaf is usually easiest.
3. Press **Take a photo** or **Upload a photo**. Fill the frame with that part, in focus, in daylight.
4. Wait for "Identifying your plant…".
5. Read the result card: the name, the scientific name, and a match line such as "Probably · 45% match". It also lists "Could also be:" look-alikes (up to three).
6. Read "How it grows": mature size, growth rate, sun, bloom time, hardiness zones and whether it is native, plus a small picture at planting, 3, 5 and 10 years. The source line says whether it is linked to a library plant, based on a close relative, or estimated.
7. To keep it, press **Add to My Library**. The window shows how much storage the plant uses and how much you have left. Or press **No thanks**.
8. After saving you can press **Place it in my design**, or **Full plant facts**, or **Identify another**.

Tips

- Photograph one leaf plus a flower if you can, then try the whole plant.
- Warnings come from a built-in list of plant names, not a full database. They cover poison ivy family, common weeds and some invasives. Treat them as help, not a guarantee, and confirm with a local expert.
- If the plant has no growth data, a saved plant is shown at a fixed size.
- Saved plants go in the group "Identified plants" (or "Weeds").

If something goes wrong

- "We couldn't identify that plant. Try a closer, clearer photo of one leaf or flower." Retake it.
- "That doesn't look like a plant." Plant ID only identifies plants.
- "That's a lot of identifying today! Try again tomorrow." A daily server limit was reached (code default 60; placeholder).
- "Your storage is full." Add more storage, or delete unused My Library items.
- "Plant ID isn't switched on yet." The owner needs to add a key.

Undo, redo and seeing the original

Step back through up to 120 changes, jump to any step in History, redo, and peek at your original photo.

Every change you make can be reversed. The Designer keeps a list of your steps and lets you move back and forward through it.

Steps

1. Press **Ctrl+Z** to undo the last change. On a Mac, Cmd+Z works too.
2. Press **Ctrl+Shift+Z** or **Ctrl+Y** to redo.
3. Use the Undo and Redo buttons in the top bar for the same thing. A button is greyed out when there is nothing to undo or redo.
4. Press the **History** button in the top bar ("see every change and go back to any step"). The list starts at "Original photo" and shows each change in order, with "You are here" on the current step and a time such as "just now".
5. Tap any step to jump back to it. Later steps stay in the list, greyed and marked "Undone — tap to redo". Tap one to bring it back.
6. Press and **hold** the eye button, "Hold to see the original photo". Let go to return to your design.
7. In the Paint panel (the **Mulch, stone & lawn** tab), the brush has three modes: **Paint**, **Undo paint** and **Show original**. Undo paint brushes paint away where you drag. Show original brings the photo back under your brush, and also undoes erasing and AI changes in just that spot.

Tips

- The undo list holds 120 steps. Older steps drop off the start of the list.
- A guided removal or a cover-up is added as a step you can undo. After using **Remove it**, the app says "Removed! Not perfect? Undo, adjust the selection and try again."
- The outline editor (the white-dot screen used for beds and areas) keeps its own shorter list of about 60 steps while it is open.
- **Esc** cancels what you are drawing before it is added. It also clears a multi-selection.
- Making a new change after undoing clears the steps you undid. Use History before you make a new change if you want to go forward again.
- The undo list is cleared when the Designer loads a view again, so do not count on it after reopening a design or switching views (the code clears it on load; exact moments not verified). Saved cloud versions are a separate safety net; see Save and autosave.

If something goes wrong

- Undo does nothing: you may be at the start of the list, or past the 120 steps.
- Redo vanished: a new change clears the redo list.
- The peek button does not stay on: it only shows the original while you hold it. On a touch screen keep your finger on it.
- You closed the design by mistake: reopen it from **My designs**. See Save and autosave for versions.

Save, autosave and cloud designs

How designs are saved on your device and in your account, and how to find, tag, favorite and recover them.

The Designer saves for you. You do not press a save button for normal work.

How saving works

- A change starts autosave after a short pause (about 0.9 seconds in the code). The status next to the design name reads **Saving…**, **Saved** or **Not saved**.
- Designs are kept in your browser's storage on this device (IndexedDB). If you are signed in, they are also copied to your account. A cloud icon in the top bar means "Saved to your account"; its tooltip changes to "Saving to your account…", "Couldn't reach your account — saved on this device" or "Storage full — saved on this device only".
- If your online storage is full, a window tells you your latest changes are only saved on this device, and offers to add storage.
- Private browsing can block storage. The home screen then says "This browser is blocking storage, so designs can't be saved (private mode?)."

Steps: find and manage designs

1. On the home screen, **My designs** shows your most recent designs. Press **See all** (or the "See all N designs — search, tag & organize" button) to open the full page.
2. Search by name or tag. Use the sort box: Recently edited, Newest first, Oldest first, Name A-Z.
3. Under **Show**, pick All designs, **Favorites**, **Not tagged yet**, or **Only in my account** (shown when you are signed in and have account-only designs). Tap the star on a card to favorite a design.
4. Tags: Yard designs, Bed designs, Paver designs, My Home designs, Front yard, Backyard and Ideas to try come ready-made. Press **New tag** for your own. Pick several tags to show only designs that have all of them.
5. On a card menu choose **Tags…**, **Rename**, **Duplicate** or **Delete**. Press **Select** to tick several designs, then **Tag**, favorite or **Delete** them together. Delete asks "This can't be undone."

Versions

In the **More** menu, **Design versions & notes** lets you name and save versions on this device. When signed in you can also **Save a version to my account**. The newest 20 account versions are kept, plus every version you approve. **Restore** makes a new version and erases nothing.

Tips

- Name designs by customer and area.
- Opening an account-only design first shows "Downloading your design…".
- Press **Duplicate** before a big change. It makes a copy called "(copy)" (shown for designs stored on this device).
- Storage sizes and limits are placeholders; no numbers are promised.

If something goes wrong

- "Not saved": the app says "Couldn't save on this device. Storage may be full or blocked." Free some space, then make another change.
- A design is missing on a new device: sign in with the same account and check **Only in my account**.
- Storage full: delete old designs or add storage from your account.

Print, share and send a design

Save a picture, print a one-page sheet, share a link, or send the design to the business.

Once a design looks right, use the **More** menu in the top bar to save it, print it or send it on.

Steps: save a picture

1. Open the **More** menu, under "Save & share".
2. Choose **Save a picture**. A JPG downloads, named after the design and the view.
3. The picture has a dark bar along the bottom with the design name, the view name, and "VisionScaper by" your business name and site. The app says "Image saved to your downloads."

Steps: print

1. Open **Print** from the More menu.
2. A letter-size page is prepared with your title and date, the picture (or Before and After side by side if you changed the photo), an "In this design" plant and ground-material list, and a footer.
3. Your browser's print window opens. Choose your printer or Save as PDF.

Steps: share

1. Open **Share on social media** from the More menu.
2. The window is called "Share your design". If you changed the photo, pick **Before & after** or **Just the design**.
3. Press a network: Facebook, Pinterest, X, WhatsApp, Nextdoor, LinkedIn, Reddit or Email. Or press **Copy link**. On phones and some browsers a **Share…** button also appears.
4. **Save for Instagram / TikTok** downloads a picture to post from your photos.
5. You must be signed in to make a link. The app asks you to sign in. Links show your picture (not your address or name).

Steps: send to the business

When the site owner turns on "Let customers send their finished design to you", the top bar shows a **Get a quote** button. It opens "Send your design to" the business. Fill in Name, Email, Phone and Town (optional), add an optional message, and press **Send my design**. The More menu also has **Request a consultation** (adds best time and where) and **Ask a question**. "Get a quote from a local contractor" appears only on sites with the contractor quote feature switched on.

Tips

- AI pictures keep the label "Concept picture – not a build-ready plan" in saved pictures, prints and shares.
- If you approved a version for the customer in **Design versions & notes**, shares and prints use that approved picture and the app tells you so.
- Check the plant list before printing; it counts every plant and ground material in all views.
- The More menu also has **Save to my Inspiration Board** and **Post to VisionScaper Browser**. These are not covered here.

If something goes wrong

- No link: sign in, then try again. A pop-up blocker can stop the social window; allow pop-ups.
- "Please add your name, email and a 10-digit phone number." Fix the form and press Send again.
- "Could not send." Try again, or use Request a consultation.
- Print layout odd: pick Letter paper and no scaling in your browser's print window.

Keyboard shortcuts

Every Designer key in one table: tools, editing, zoom, and the selection tool.

Keys work when the Designer is open on a computer. On a Mac, use Cmd where this page says Ctrl. Hover over a tool to see its key in the tooltip, for example "Erase & fill ... (W)".

Tools

Key	Tool
V	Move
W	Erase & fill (opens on **Pick the spot**)
E	Remove it (the second Erase & fill tab)
P	Add (**Plants & things**)
B	**Mulch, stone & lawn**
L	**Draw beds & patios**
M	Measure
J	Photo setup (opens on **Adjust**)
S	Scale
C	Crop
A	Ask AI
H	Pan

Editing

Key	Action
Ctrl+Z	Undo
Ctrl+Shift+Z or Ctrl+Y	Redo
Ctrl+D	Duplicate the selected item (or deselect when a highlight exists)
Delete or Backspace	Remove the selected item or items
Arrow keys	Nudge the selected item. Hold Shift to move farther
[and]	Turn the selected item 5 degrees left or right
N	Night on or off
Esc	Cancel what you are drawing or measuring, or clear a multi-selection
Enter	Finish a bed or a measurement

View

- Hold **Space** and drag to pan. The Pan tool (H) does the same.
- **+** (or **=**) zooms in, **-** zooms out, **0** fits the picture.
- The mouse wheel zooms around the pointer, only while the pointer is over the picture.

While using Pick the spot

Key	Action
Ctrl+A	Select all
Ctrl+Shift+I	Invert
Ctrl+D	Deselect
1 to 9	Switch mode: Curved edges, Straight edges, Rectangle, Object, Same color, Snap to edge, Hug the edge, Oval, Touch-up brush
[and]	Smaller or larger brush
Delete or Backspace	Remove what is highlighted
Enter	Finish a shape or accept a preview
Shift, Alt	Add to, or take away from, the selection

Tips

- Backspace removes the last point while you draw a bed.
- Keys do nothing while a window is open, so close it first.

If something goes wrong

- Keys ignored: click the picture first so a text box is not focused. Keys are also ignored while you type in any text box.
- A tool key opened a different tab: the key opens the first tab of its group; use the tab names at the top of the panel.

Use the Designer on a phone

Camera, tilt, pinch zoom, long-press menu and other touch tips for phones and tablets.

The Designer works on phones and tablets. On narrow screens (under about 860 pixels wide) the layout changes: the tools sit in a row along the bottom, the options panel sits under the picture, and some labels shrink to icons.

Steps

1. Open the Designer on your phone and start a design with **Take a photo**. The camera screen says "Hold your phone sideways at eye level. Fit the whole area in the frame."
2. If the camera cannot open, VisionScaper opens the file picker instead so you can choose a photo. Browsers only allow the camera on secure (https) pages and after you allow it.
3. On an iPhone, allow motion and tilt access when asked. The tilt at the moment of the shot sets the eye-level line. If there is no sensor, you can drag the blue eye-level line yourself.
4. Pinch with two fingers to zoom, and drag two fingers to move the picture. The Fit button and the plus and minus buttons also work.
5. In the **Erase & fill** tool, press and hold on the photo for about half a second. A menu of choices for that spot appears, like a right-click. A short buzz confirms it on phones that support it.
6. Tap the grip bar above the options panel to hide or show the panel and see more of your picture.
7. To select several items with a finger, open the Move tool. When your photo has placed items or painted areas, its panel has a **Select many** section. Tick "On touch screens: one-finger drag selects (instead of panning)". Then drag a box on an empty part of the photo.

Tips

- Some labels are hidden on small screens. **Ask AI** and **Get a quote** show only their icons. The Saved status shrinks to a small mark. The sun button is hidden in the scene bar.
- Space-to-pan and the keyboard shortcuts are for computers with a keyboard.
- Photos are resized so the longest side is at most 1600 pixels.
- Long-press as a menu is verified only in the Erase & fill tool. In other tools, press-and-hold is kept for dragging.
- Whether the floating selection bar stays pinned on a phone is not verified in code.

If something goes wrong

- Camera blocked: allow it in your browser's site settings, or upload a photo instead.
- Tilt not working: grant motion permission, reload, then retake the photo. Or drag the eye-level line.
- Panel in the way: tap the grip bar to hide it.
- One finger pans when you wanted to select: tick the one-finger select box above.
- Pinch zooms the whole web page: pinch on the picture itself, not on the panel.

Designer troubleshooting

Fixes for common Designer problems: camera, scale, saving, missing plants, 3D, aerial and AI.

Find your problem in the table. Each fix uses wording that appears on screen or in the code.

Problem	Try this
Camera will not open	Browsers only give the camera to secure (https) pages and only after you allow it. If it cannot open, the app shows the file picker so you can upload a photo instead. Allow the camera in your browser's site settings.
Plants look the wrong size	Redo the scale. Use **They look too big** or **They look too small**, or measure a door or car for a more exact scale.
Painted materials break up or look stretched	The readme says 2.51.0 fixed breaking up on photos. If a material still looks stretched, lower the **Perspective of painted ground** slider in the Brush or Bed panel.
Status says Not saved	The app says "Couldn't save on this device. Storage may be full or blocked." Free space, leave private browsing, then edit again. See Save and autosave.
Design missing	Sign in, then open **My designs** and choose **Only in my account**.
No real plant photos	The site owner installs a library pack. Without one, plants are drawn.
Explore in 3D empty or off	The owner needs a Google Maps API key in Settings, VisionScaper, with the Maps JavaScript API enabled (the settings screen says so). Follow Google's current instructions.
Bird's-eye blank	Check the address. The aerial screen says Connecticut has 3-inch state imagery and elsewhere USGS imagery at about 2 feet per pixel. "The aerial pictures didn't finish loading — try again." means wait and retry.
AI will not run	Sign in. Check the credits pill and the daily allowance. See Design with AI.
"That's a lot of removing today!"	The online fill has a daily limit. Try tomorrow, or see Remove something.
Plant ID says it is not switched on	The owner has not added an identification key yet.
Select by name finds nothing	Sign in, and ask the owner to turn on the online finder. Or outline it by hand.
Keys do nothing	Click the picture first so no text box has focus, and close any open window. See Keyboard shortcuts.
Pet safe filter missing	The **Pet safe** chip appears only when plants in the library carry pet-safe data. It is not verified for your data, so you may never see it.
Wheel zoom feels wrong	The mouse wheel zooms the picture only while the pointer is over it. Move the pointer off the picture to scroll the page.

Steps when nothing helps

1. Check that the status reads **Saved**, so your work is safe.
2. Reload the page.
3. Reopen the design from **My designs**.
4. Contact the site owner. Tell them what you pressed and the exact message you saw.

Tips

- Write down the on-screen message. The wording helps find the cause fast.
- Test in another browser to rule out a blocked camera or storage setting.

Sales, quotes & pricing

Customers, pipeline, quotes, proposals, services and price book.

The Today (Overview) screen

What you see when the Contractor Hub opens: greeting, four numbers, Needs you, today's jobs and quick buttons.

Today is the first screen of the Contractor Hub. In the left menu it is the first item, under the group called **Home**. Its menu name is **Today**. The page heading is the greeting, such as "Good morning" followed by your first name, with the date underneath.

What is on the screen

Block	What it shows
Four numbers	**Jobs today**, **Late invoices**, **Quotes waiting**, and **Paid this week**
Needs you	A short to-do list. Each row opens the list behind it. See "The Needs you list"
Today's jobs	Every job card for the day, soonest first, with crew names or "No crew yet"
This week	**Won**, **Invoiced** and **Paid**, each with a count and a dollar total
Get set up / Get started	A checklist until the basics are done. You can hide it
Marketing card	What the marketing assistant has for you today
Quick buttons	**New quote**, **Add customer**, **Schedule a visit**, **New invoice**
Recent activity	The latest events on your customers and quotes
Reviews	Recent customer reviews, with a Reply button

Some blocks only show for roles that may see money. If your role cannot see money, **Paid this week** and **This week** are left out.

Steps

1. Open the Hub. Today opens first.
2. Read the four numbers across the top. Tap nothing yet. They are only a summary.
3. Look at **Needs you**. Tap a row to go straight to the list it counts.
4. Check **Today's jobs**. If any job has coordinates saved, a **Map** button appears. It shows numbered pins for the day.
5. Tap a job to open it.
6. Use the quick buttons when you need to start something.

Rearranging the screen

Tap **Arrange** (next to the **New quote** button). You can change the order of the blocks and hide some. The Overview can also be simplified through the "Show me" setting in Settings. (The exact wording of that setting is not covered here.)

The Get set up checklist

Until you finish it, a card lists the first jobs to do. In the code the steps are: add your logo and phone; set your labor rate and markups; get paid online (Stripe); review your customer messages and reminders; add your first customer; send your first quote. Tap a step to jump to it. It shows how many are done.

Tips

- Check Today first thing. Then work down **Needs you** from the top. The list is already sorted with the most urgent first.
- If a follow-up was held back because a payment was outstanding, a banner says so and a **Review held follow-ups** button appears.

If something goes wrong

- **"Couldn't load today's jobs."** The rest of the screen still works. Try again or reload the page.
- **A block is missing.** You may have hidden it with **Arrange**, or your role may not be allowed to see it.
- **No dollar figures.** Your role does not include seeing money. Ask the owner.

The "Needs you" list

The one list of things that need action today, what each row counts, and where each row takes you.

Needs you counts work that is waiting for you. It does not create new data. Each row counts something that already exists, using the same rule as the list it opens. It appears on Today, and also behind the bell icon at the top of every Hub screen.

What the rows mean

Row text	What it counts	Opens
job(s) in the next 3 days have no crew	Open jobs starting in the next 3 days with nobody assigned	Field work, assign view, "no crew" list
late invoice(s)	Open invoices past their due date	The unpaid invoices screen, late only
budget alert(s) on open jobs	Jobs still over their budget alert	Budget alerts, active only
new website request(s) to answer	Quotes with the status **Request**	Quotes, filtered to **Requests**
customer message(s) waiting for your reply	Customer threads where the customer wrote last	Inbox, **Needs reply**
won quote(s) with no job booked yet	The **Signed** column on the sales board	Sales board, that column
expense(s) waiting for your OK	Expenses waiting for approval	Pending expenses
quote(s) waiting for a reply from the customer	Quotes with the status **Sent** or **Viewed**	Quotes, **Sent & viewed**

Rows are sorted by urgency. Rows marked **Now** are the high-level ones: no crew, late invoices and budget alerts. Medium rows come next. The "quotes waiting" row is information only, so it does not add to the menu count.

Who sees which row

A row is left out when your role may not open the list behind it. The sales rows (requests, messages, won with no job, quotes waiting) are shown to the owner. Money rows need the right to see money. A crew member will therefore see a shorter list than the owner.

Steps

1. Open Today and find the **Needs you** card. Or tap the bell at the top.
2. Tap a row. The matching list opens.
3. Work through that list. When the count drops to zero the row disappears.
4. When nothing is left you see "All clear. Nothing needs you right now."

The Suggest times button

On the "no crew" row there is a **Suggest times** button when you are allowed to assign people. It opens a helper for the first unassigned job. If every job in the next 3 days already has a crew, a message tells you so.

Tips

- The bell shows a total number. Hover or tap it to see the same rows.
- Numbers also appear next to menu items. Only action rows are counted, not the information row.

If something goes wrong

- **The count looks wrong.** The number comes from the server each time Today loads. Reload Today.
- **A row opens an empty list.** Someone may have just handled it. Reload.
- **You expect a row but it is not there.** Your role may not be allowed to open that list.

Header search and the "+ New" button

Find any customer, quote, job or setting from the top bar, and start new records from the "+ New" menu.

Two tools sit on every Hub screen: the search box in the top bar, and the **+ New** button (in the left menu on a computer, a round **+** button on a phone).

Search

The box says "Search customers, quotes, jobs...". Type at least two letters. Results appear after a short pause and are grouped:

- **Customers** and **Properties**
- **Jobs and visits**
- **Quotes**
- **Invoices**
- **Tasks**
- **Screens**, matched by everyday name or an old name (for example "Pipeline" finds the **Sales board**)
- **Settings**, matched by setting name

You can search by name, address, phone number or quote number. If nothing shows, the box says: "Nothing found. Check the spelling, or try part of the address or phone number."

With the box empty and in focus, you see **Recent**: the last items you opened, newest first (up to 20).

Steps

1. Click the search box.
2. Type part of a name, address, phone number or quote number.
3. Use the Up and Down arrow keys to move through results, and Enter to open the highlighted one. Escape closes the list.
4. Or just click a result.

Where results open: a customer opens the customer page. A property opens that customer's **Work** tab. A quote opens the quote. A job opens the job card. An invoice opens the invoices screen. A setting opens its Settings tab with the setting highlighted. A task opens as a small card.

The + New menu

Click **+ New** (on a phone, the round button). The menu depends on what your role may do. The possible entries are:

Entry	Shown when you can
New customer	edit customers or add leads
New quote	start quote drafts
New job or visit	assign jobs
New invoice	see money and start drafts
New expense	add expenses
New task	everyone
Clock in	everyone

New expense asks for amount, category, vendor and note. **New task** asks for a task title, an optional due date and notes. **Clock in** asks "What are you doing?" and uses the activities set up in Field work settings. If none exist you are told clock in is not set up yet.

Each small form sends a retry token, so a double tap saves the record once. If the server refuses, the reason shows in the form and nothing is saved.

Tips

- Search is faster than clicking through menus once you have many customers.
- Search only shows what your role is allowed to open.

If something goes wrong

- **The result you want is missing.** Try part of the phone number or address.
- **"Search did not work. Try again."** Check your connection and retype.

- **The + menu has fewer entries than you expected.** Your role does not have those rights.

Customers: the list, search, and adding a customer

Use the Customers list, filter by stage, add a customer with the full form, and select customers to export.

Open **Customers & Sales** in the left menu, then **Customers**. Every quote, visit and invoice belongs to a customer, so this is where most work starts.

The list

- A search box reads "Search name, phone, email, address, tag…".
- Filter chips: **All**, **Potential customer**, **Prospect**, **Customer**, **Past customer**, **Lost**.
- Each row shows a photo or initial, name, address and town, and the stage. A small "VisionScaper" mark means the person has their own VisionScaper account and can use the customer portal.
- Buttons: **Import / Export**, **Select**, **Add customer**.

If the list is empty you see "No customers yet" and a button, **Add your first customer**.

Steps: add a customer

1. Tap **Add customer** (or **+ New**, then **New customer**).
2. Fill **Full name**. It is the only required field.
3. Add **Company**, **Mobile phone**, **Other phone**, **Email**, and **Prefers** (Text, Phone call, Email).
4. Under **Property address** start typing the street. Town, state and ZIP fill in for you.
5. Under **Potential customer** set **Stage**, **How they found you**, **Referred by** and **Best time to reach**.
6. Under **Project** add **Interested in**, **Budget**, **Timeline** and **Property type** (Residential, Commercial, HOA / condo, Rental property).
7. Open **More details (access, pets, utilities, billing)** for lot size, gate or access, pets, irrigation, hidden utilities, HOA, a different billing address, a maintenance choice and a **Tax exempt** box.
8. Use **Other contacts** for a spouse, tenant or manager. **+ Add another contact** adds a name, role, email and phone.
9. Add **Tags** (comma separated) and **Notes**. Tap **Add property photo** if you want a photo.
10. Tap **Add customer**. The new customer page opens.

Selecting and exporting

Tap **Select**. Tick customers, or use **Select all shown**. The bar shows "N selected" and an export button. See the import article for file formats.

Tips

- Put the gate code, dog and hidden lines in the details. They show on the customer page and help the crew.
- Tags let you search for groups such as "VIP".
- Your plan may limit customers or leads per month. A usage bar shows it when so. The limits are placeholder, not approved.

If something goes wrong

- **"No customers match."** Clear the search box and the stage chip.
- **The form will not save.** Check that the name is filled in.
- **A duplicate was created.** Open both and keep one. The import tool has a duplicate check, but the manual form does not merge for you.

The customer page and properties

Four tabs (Overview, Work, Money, Notes), the action buttons, and how to add and use properties.

Open a customer from the list or from search. The top shows the name, stage, the source ("via Website" for example), tags and quick links: call, text, email and a map link for the address.

Buttons under the name

- **New quote**: starts a quote for this customer and their first property.
- **Edit**: opens the same form used to add a customer.
- **Log call / note**: saves an activity. Types are Phone call, Note, Meeting / site visit, Email (sent outside VisionScaper) and Text (sent from my phone).
- **Schedule visit**: opens a visit titled "Site visit – name".
- **Measure property**: opens the Measure tool for this customer.
- **Download contact card**: gives a vCard you can open on your phone.

The four tabs

Tab	Contents
Overview	Details (prefers, best time, budget, access, pets and so on), a Marketing card with consent, and other contacts
Work	Properties, **Quotes & jobs**, and **Measurements**
Money	Invoices and **+ New invoice**
Notes	**Contractor notes** (private) and **History**

Properties

A customer can have several properties. Each property card shows photos (an aerial plus any you add), a plan summary and buttons:

- **Create a landscape plan** (or **Plan wizard** if a plan exists)
- **Open 2D plan** (when a plan has shapes)
- **Add photo**: you are asked what the photo is of (front, back, left side, right side, structure, existing landscape)
- **Check slope**: appears when the property has map coordinates. It reports the slope across the lot as a percentage and a class
- **Notes**: soil, sun, drainage, access

Steps: add another property

1. Open the customer, then the **Work** tab.
2. Tap **+ Add property**.
3. Type the street, town and state and pick the address from the list. It must be at least a street, town and state.
4. Tap **Save**.

Tips

- If a customer has more than one property, the quote screen asks which one the quote is for.
- Log every call. The History tab becomes your record.
- The slope check is measured from map data and is a guide, not a survey (not verified beyond the screen text).

If something goes wrong

- **No "Check slope" button.** The property has no saved map point yet.
- **Photos missing.** The card says "No photos yet." Add some.
- **Wrong property on a quote.** Open the quote and pick another in the **Property** drop-down before it is sent.

Lead stages and "How they found you"

Use the customer Stage and Source fields to track where leads come from and how far along they are.

VisionScaper tracks a lead as a customer record with two labels: a **Stage** and a **Source**. You set both in the customer form, and the Sales board and win/loss report read them.

Stage

The stages in the customer form are:

Stage	Use it for
Potential customer	Someone who asked or showed interest (this is the default for new leads)
Prospect	Someone you are actively working toward a quote
Customer	Someone who has hired you
Past customer	Someone you worked for before
Lost	Someone who did not go ahead

The Customers list has a chip for each stage, so you can see just your potential customers.

Source

The **How they found you** drop-down offers: **Website**, **Phone call**, **Text message**, **Referral**, **Social media**, **Contractor referral**, **VisionScaper**, **Repeat customer**, **Other**. A **Referred by** box sits next to it.

Leads can also arrive with their own source. The outside lead feature stamps **Angi**, **Thumbtack**, **Google Local Services** or **Other source** on requests it brings in. The **VisionScaper** choice is there for customers who came through the app (how it is set automatically was not verified in code). A friend who uses a customer's personal referral link becomes a normal new lead with source "referral".

Steps

1. Open the customer and tap **Edit**.
2. Find the section called **Potential customer**.
3. Choose **Stage** and **How they found you**.
4. Fill **Referred by** if someone sent them.
5. Tap **Save customer**.

Why it matters

- The Sales board card shows the source ("unknown source" if empty).
- The win/loss report on the Sales board groups deals by source. It shows deals, won, lost and close rate for each, so you can see which source pays. See the win/loss article.
- If you leave the source blank, that report cannot tell you where the money came from.

Tips

- Pick the source when you take the call, not later.
- Use **Referred by** to remember whom to thank.
- Change a customer to **Customer** or **Lost** by hand. The Sales board moves cards for deals on its own, but the stage on the customer is yours to keep current.

If something goes wrong

- **Source shows "unknown source".** Edit the customer and choose one.
- **A website lead has no source.** The request form sets source "website". If it is empty, check how the lead arrived.

Outside lead sources (Angi, Thumbtack, Google Local Services)

Bring requests from Angi, Thumbtack and Google into your customers without doubles, using a secret address or by pasting the email.

The screen is called **Request sources**. It sits in the Customers & Sales group, right after the Inbox. It needs a plan that includes it. Which plan is a placeholder, not approved. If your plan does not include it you see a message and a **See plans** button.

> Warning: The email and message layouts VisionScaper reads are based on typical notification layouts. They have not been checked against live emails from Angi, Thumbtack or Google. The screen says so too. When something is missing, the lead is still saved and marked "needs review".

How it works

There are three ways in:

1. **A secret address for each source.** Each source (Angi, Thumbtack, Google Local Services, Other source) has its own private web address.
2. **Paste the email.** The page has a box for pasting a whole request email.
3. **A forwarding service.** VisionScaper does not read a mailbox for you. If you want emails to arrive on their own, use a mail-forwarding service that posts to your secret address. Set that up with the service's own current instructions.

New requests become customers marked as new requests. Matching uses email or phone, never the name alone, so a repeat lead fills in the existing customer instead of making a second.

Steps: paste a request email

1. Open **Request sources**.
2. In **Paste a request email**, pick **Which service sent it?**
3. Paste the whole email into **The email**.
4. Tap **Check it**. A preview lists name, phone, email, address, service and message, and tells you if it would match an existing customer. Nothing is added yet.
5. If it looks right, tap **Add this request**.

Steps: use the secret address

1. On a source card, tap **Copy address**.
2. Paste it into your forwarding service as the place to send new leads.
3. Tap **Test with a sample**. It shows a sample and what was read. **Nothing was added.**
4. Watch **Recent requests**. New ones show a badge such as "New from Angi". Tap **Mark seen**, or **Mark all seen**.

Other buttons on a source card

- **Make a new address**: the old address stops working right away. Do this if it leaked.
- **Turn off** / **Turn on**: pause a source.
- **Open customer**: jumps to the lead.
- **Try again**: for a request held because of a plan limit.

Tips

- Keep the address private. Anyone who has it can post leads.
- The raw message is kept for 90 days, then deleted. The customer stays.
- A request seen twice is counted once ("Sent twice, counted once").

If something goes wrong

- **"Needs review: missing phone".** Open the customer and fill it in.
- **Status "Not added yet (plan limit)".** Your plan's limit was reached. Use **Try again** after it resets or changes.
- **Nothing arrives.** Check the forwarding service. VisionScaper only receives what is posted to the address.

The Sales board (pipeline)

See every deal in six columns, mark a deal Lost with a reason, and reopen it, plus the win-rate report on top.

The Sales board is the old "Pipeline". Open it from **Customers & Sales**, or with the **Sales board** button on the Quotes screen. It shows each deal as a card in one of six columns.

The columns

Column	What lands here
Lead	A customer with no quote yet, or a quote that is still a draft or a request
Quoted	A quote that is sent or viewed but not signed
Signed	A signed quote with nothing on the calendar yet
Scheduled	A signed quote with a job visit booked, or a job marked scheduled or in progress
Done	A signed quote whose job is finished
Lost	A declined or expired quote, or a customer marked lost

The board stores nothing about where a card sits. Cards move on their own as you send a quote, get it signed, schedule and finish the job. Each column heading shows its count and the dollar value, plus "N not priced yet" for estimates with no price.

Each card shows the customer name, the quote title or number, source, age in days, and "odds" when known. Estimated values show with a "~".

Steps: mark a deal Lost

1. Tap a card in **Lead** or **Quoted**.
2. In the window, type **Why was it lost? (required)**.
3. Tap **Mark lost**. If the reason is empty you are told to "Say why it was lost first."
4. The card moves to **Lost**.

Steps: reopen a lost deal

1. Tap the card in **Lost**. The reason is shown ("Lost: ...").
2. Tap **Reopen as a lead**.

Other things in the window

- **Open customer** jumps to the customer page.
- A line reminds you: cards move on their own.

Only these two moves are real state changes the board makes. Anything else, such as signing or scheduling, is done where it belongs (the quote, the calendar). If you try another move, the Hub explains why it is refused.

Tips

- Open the **Signed** column often. It is the same list as the "won quote with no job booked yet" row on Needs you.
- Always give a plain reason. You will use it later.
- If you want only one column, the page can show it alone, with a link "Show the whole board".

If something goes wrong

- **A change was refused.** The card changed since you opened it. Reload and try again.
- **The report box is missing.** The win/loss report needs the right to see money. The board still works.

The Inbox: messages with customers and leads

Answer customer and lead messages, use the Needs reply filter, quick replies, and the project card.

The **Inbox** (menu text "Customers & leads") is where customers and new leads write to you. When a homeowner requests a quote through VisionScaper, the conversation starts here with their project brief.

The list

For contractors the filter chips are **Needs reply** (the default), **All**, **Unread** and **Archived**. A search box reads "Search messages". **Needs reply** sorts the oldest waiting first and says, for example, "Needs a reply, waiting 2 days". Other states are "New, needs a reply", "Waiting on customer" and "Closed". Empty means "All caught up".

Needs-reply tracking and quick replies are part of a Pro plan feature. You can still read and reply to everything without it. Which plan holds it is a placeholder, not approved.

Inside a conversation

A project conversation shows a card with the address, services, next appointment, the quote and its status (Request, Estimate in progress, Quote sent, Quote viewed, Hired, Declined, Expired). Buttons on the card:

- **Start the estimate** (or **Open quote** once it exists)
- **Book a visit**
- **Ask for missing details**: you tick what you need and add a note, then **Send request**

The message box says "Write a message…". Next to it: a camera button to **Add a photo** (take one or choose one) and a lightning button for **Quick replies**. A phone icon calls the customer.

Steps: answer a waiting customer

1. Open **Inbox**. **Needs reply** is selected.
2. Open the oldest thread.
3. Read the brief on the project card.
4. Type your reply, or tap the lightning button and pick a saved quick reply.
5. Tap send.

Steps: set up quick replies

1. Open a thread and tap the lightning button.
2. Tap **Edit quick replies**. This opens Settings, on the Quick replies tab, in the group **Messages and connections**.
3. Add your replies and save.

Alerts

The conversation list has an **Alerts** button for your message notification settings.

Tips

- Open **Needs reply** before anything else each day. It matches the "customer message waiting for your reply" row in Needs you.
- Use **Ask for missing details** instead of guessing. It sends one specific message.

If something goes wrong

- **You cannot message someone.** The box is disabled with "You can't message this member."
- **No quick replies.** The feature is not in your plan, or you have not added any yet.
- **A thread keeps coming back.** A new message brings an archived conversation back.

The request form for your website

Turn on the website request form, choose services and photos, add spam protection, and paste it into WordPress.

The request form is a form your customers fill in on your own website. It makes a new lead, sends the customer an instant reply and alerts your office. It is **off** until you turn it on.

The settings are in **Settings**, group **Messages and connections**, tab **Connected apps**. Scroll to the card **Request form for your website**.

What the form asks

The form heading is "Request a visit or a quote". Fields: **Your name**, **Email**, **Phone**, **Property address**, **Town**, **What do you need?** (the services you switched on), **Anything we should know?**, **Photos of the area** (optional), **Best times to reach you** (optional), two consent boxes ("Email me about this request", "Text me about this request"), and **Send my request**. If self-booking is on, a day and time picker appears as well.

The consent boxes are not ticked for the visitor. They are not marketing consent. The exact wording shown and the time are stored so you can prove what they agreed to.

Steps: turn it on

1. Open Settings, then **Connected apps**.
2. In **Request form for your website** tick **Turn the request form on**.
3. Under **Services offered** tick the services to list. They come from your service templates.
4. Set **Photos allowed (0 = none)**. The limit in the field is 0 to 10.
5. Decide on self-booking and spam protection (see below).
6. Tap **Save**.

Steps: put it on your site

Under **Put it on your website** you get three copy boxes:

- **Shortcode (WordPress page)**: paste it into a WordPress page.
- **Paste this one line anywhere**: an embed line for any site.
- **Link to the form page**: a framed page you can link to.

Spam protection

Always on: a hidden trap field, a minimum fill-in time and a limit per address. Optional: Cloudflare Turnstile. You need your own free Cloudflare account, and visitors' browsers contact Cloudflare when the form loads. To use it, tick **Use Cloudflare Turnstile** and paste the site key and secret key from Cloudflare into the two fields. Get the keys by following Cloudflare's current instructions. Leave it off unless you see spam.

A second website form

VisionScaper also has a different lead form with the heading "Get a free design & quote". It starts with an address and a short walk through photos, and offers "Design it with VisionScaper first". It is a separate shortcode from the request form above. (The request form above is the one managed in Settings; the settings for this second form were not verified in code.)

Tips

- Every submit creates a new lead. It never merges into an existing customer by itself. Possible matches are listed for your office.
- A repeated tap of Send returns the first result. It will not double-create.

If something goes wrong

- **The form shows nothing.** It is still off. Tick it on and Save.
- **Spam.** Turn on Turnstile.
- **Leads are not arriving.** Look in Quotes, filter **Requests**, and in the Inbox.

Intake questions for homeowner requests

Add your own questions to the homeowner's request, per service, so you can price without a phone call.

When a homeowner sends you a request through Find a Local Contractor, VisionScaper asks them a set of questions so you have what you need to quote. It already asks a standard set. You can add your own.

What VisionScaper already asks

- **Site questions every request gets**, for example: how wide the way into the work area is, flat or sloped, wet spots, septic, well, propane or oil tank, irrigation, HOA approval, pets or children, where a truck can park, and where materials can be dropped.
- **Service questions**, for each of these services: Landscape design, Planting, Mulch & stone, Lawn installation, Patios & walkways, Retaining walls, Landscape lighting, Fencing, Drainage & grading, Tree work, Lawn care, and Irrigation. Planting, for example, asks what to plant, the goal, sun, whether deer visit, whether to remove existing plants, and how the plants will be watered.
- Budget, timing, priorities and contact details.

A completeness score shows how finished the brief is. A plain list names what is missing and why it matters.

Steps: add your own questions

1. Open **Settings**, group **Messages and connections**, tab **Intake questions**.
2. Pick a chip. **Every request** applies to all. A service name applies only when the homeowner picks that service.
3. Tap **+ Add a question**.
4. Type the question, for example "Is there a dog in the yard during work hours?"
5. Choose the type: **Short answer**, **Long answer**, **Pick one**, **Pick any**, **Yes / No**, **Number**, **Date**.
6. For Pick one or Pick any, type the **Choices, separated by commas**.
7. Optionally fill **Why you ask**. People answer more when they know why.
8. Tap **Save my questions**. It tells you how many were saved.

A drop-down on each service lists "VisionScaper already asks N questions for this service". Open it to avoid repeats.

Where you see the answers

On the quote that comes in as a **Request**, open **Their answers**. Your own questions are labelled "(your question)". The request brief card also shows services, budget, timing, priorities and anything still missing.

Tips

- Add only questions you really need. Long forms lose people.
- Good ones: gate width, a dog, a hidden line, parking, HOA name.

If something goes wrong

- **The tab is locked.** Custom intake questions need a plan that includes them (a placeholder, not approved). A note on the tab says so.
- **Your question does not show for a service.** Check you added it under that service's chip, or under **Every request**.

Self-booking: let visitors pick a visit time

Offer open visit times on your request form, choose who can be booked, and decide whether times confirm automatically.

Self-booking is an option on the request form. A visitor picks a day and a time for a visit. It stays a **request** until your office confirms it, unless you turn on automatic confirmation.

How open times are worked out

VisionScaper looks at the working hours of the people you allow, their time off, and the jobs and visits they are already assigned to. A time is offered only when a chosen person is free. When a visitor picks a time, VisionScaper holds that person at that time, so two visitors cannot take the same person at the same time.

Steps: turn it on

1. Open **Settings**, group **Messages and connections**, tab **Connected apps**.
2. In **Request form for your website**, make sure the form is on.
3. Under **Self-booking (optional)** tick "Let visitors pick a time".
4. Set **Visit length (minutes)**. The field accepts 15 to 240.
5. Under **Who can be booked** tick the people.
6. Decide on "Confirm picked times automatically (off is safer)".
7. Tap **Save**.

Make sure those people have working hours set under **Crew, team & hours**, or no times will be offered.

What the visitor sees

A section called "Pick a time for a visit (we will confirm it)" shows a **Day** drop-down and a row of times. Times are for the next 14 days.

What happens after they send

- In both cases a visit titled "Estimate visit" with the visitor's name is placed on the chosen person's calendar. Its note reads "Requested on the website form. Confirm or decline in Requests." (or "Booked on the website form." when auto-confirmed).
- Not auto-confirm: the visitor gets "Thank you! We received your request for [time]. We will confirm it shortly." Your office is told to confirm or decline the time.
- Auto-confirm: the visitor gets "You're booked! Your visit is confirmed for [time]."
- If you confirm later the customer is told "Your visit is confirmed". If you decline, they are told, and the held time is released.

Where you confirm or decline

The requests list for confirming or declining a picked time is a phone-app route (named "mobile/requests", with confirm and decline actions). A Hub screen for it was not found in the Hub code. (Not verified in code: check the phone app for the confirm and decline buttons.) The Needs you list and the Quotes **Requests** filter show new requests.

Tips

- Keep auto-confirm off until you trust your hours.
- A shorter visit length offers more times.

If something goes wrong

- **No times are offered.** The people you chose have no working hours, are on time off, or are fully booked.
- **Two people booked at once.** This should not happen. A unique hold stops it.

The Quotes list and the one-button "next step"

Read quote statuses, filter the list, and use the status line and the single main button on each quote.

Open **Quotes** in the **Customers & Sales** group. Its subtitle is "Estimates, proposals & requests". In VisionScaper a quote, an estimate and a proposal are the same record at different moments. You build the estimate, the customer reads and signs the proposal.

The list

Filter chips: **All**, **Requests**, **Drafts**, **Sent & viewed**, **Signed**, **Declined**, **Expired**. A search box reads "Search title or number". Each row shows a thumbnail, the title, number, customer, how long ago it changed, a status label, the total, and a job status when signed.

Status	Meaning
Request	A customer asked for a quote. Nothing priced yet
Draft	You are building it. Not sent
Sent	Sent to the customer
Viewed	The customer opened it
Signed	The customer approved it. It is now a job
Declined	The customer said no
Expired	The "good until" date passed

Two buttons sit at the top: **New quote** and **Sales board**. If you have no quotes yet you see "No quotes yet" and **Start a quote**. If the **Requests** filter is empty it says no new requests.

The status line and the main button

Open a quote. At the top is a line of seven steps: **Request, Quote, Won, Scheduled, Done, Invoiced, Paid**. The current step is marked and done steps have a tick. Under it is a short hint and **one main button**. Next to it a **More** drop-down holds other moves.

Where the quote is	Main button
Request	**Build the quote**
Draft, empty	**Build the quote**
Draft, built	**Send quote**
Sent or viewed	**Send reminder**
Expired	**Send it again**
Declined	**Start a new quote**
Signed, no visit	**Schedule it**
Signed, visit but no crew	**Suggest times**
Signed, crew set	**Start job**
Job started	**Mark done**
Done	**Invoice it**
Invoiced	**Send invoice** or **Send reminder**

More can offer: Duplicate, Copy customer link, Mark as declined, Withdraw (back to draft), Delete, Copy as job change, Cancel the job…, Start without scheduling…, Invoice before the job is done…, Invoice something else, and Preview what the customer sees.

Safeguards

- Steps cannot be skipped by going around the buttons. A job needs a signed quote, and a final invoice needs a done job.
- Some moves ask for a reason first (cancel, start unscheduled, invoice early). A decline asks for an optional one. Marking a job done asks you to confirm, because the customer is told and it cannot be undone.
- If the quote changed while you were looking, you are told "This changed while you were looking. It was reloaded."
- A signed quote cannot be deleted. It is kept as your record. Deleting a draft shows an **Undo** bar for a few seconds.

Tips

- Use the main button rather than hunting for options. It is the next sensible move.
- Use **Duplicate** to reuse a similar quote.

If something goes wrong

- **No Send button.** The quote has nothing in it yet. Build it first.
- **A move is missing from More.** Your role may not be allowed to do it.

Build a quote step by step

Choose a customer, add services or sections, check the job cost, write the proposal and save a draft.

A quote screen has three cards: **1. Customer & property**, **2. The design (before & after)** and **3. Estimate → two quotes**. "Two quotes" means one set of numbers gives you two views: the **Job cost (internal)** that only you see, and the **Customer proposal**.

Steps

1. Tap **New quote** (Quotes, Today, or **+ New**). You can also start from a customer's page.
2. In card 1 tap **Choose customer**. Type a name, phone or address. Or tap **+ New customer (full details)**. If the customer has several properties, pick one under **Property**.
3. Type the **Project name**, for example "Front Yard Renovation".
4. In card 2 add a **Before photo** and **Design picture**, or tap **Use one of my designs** to bring in a design from VisionScaper. See "From a design to a quote".
5. In card 3 choose how to start: - **Add service**: pick a template, copy a past job, or start from scratch. - **Create Quote Manually** (or **+ Add another section**). - **Quote it with AI**. See the AI Quoter article. - **Use the Landscape plan's quantities** (shown when the property has a plan).
6. Switch to **Job cost (internal)**. Each section lists lines with **Type**, **Item**, **Qty**, **Unit**, **Unit cost** and **Cost**. Types are Material, Labor, Equipment, Subcontractor, Disposal, Delivery, Other. Add a line with **+ Add line**.
7. Check the **Price** box on each section. Type your own number to override the calculated one. **reset** brings the calculated price back.
8. Use **Optional add-on** to let the customer pick a section on the proposal. Untick **Include** to leave a section out. Arrows move a section up.
9. Enter a **Discount $** if you want one.
10. Switch to **Customer proposal**. Write the **Introduction**, then the scope of work for each section, one item per line. Choose **Show prices**: price for each section, or total only.
11. Tap **Save**. A customer must be chosen first or you are asked to choose one.

The totals bar

It shows **Your cost**, **Price**, **Gross profit** with percent (red when under 25%), **Tax**, **Customer total**, **Deposit** and **Crew hours**. If your minimum job charge raised the price, a note says by how much.

Extras

- **Polish wording with AI** rewrites titles and the intro. It never changes quantities or prices. If the AI changes a number, that section is kept as you wrote it.
- **Preview** shows what the customer will see.
- A signed quote is locked. Use **Copy as job change** for changes.

Tips

- Work in the **Job cost** tab first, then read the **Customer proposal**.
- Rows highlighted as needing a price or quantity mean a number is missing. Fill it before sending.
- Be specific in the scope. Anything not listed is not included.

If something goes wrong

- **"Choose a customer first."** Pick or add one.
- **Totals look low.** Check Qty, Unit cost and the labor rate under Costs & markups.
- **Cannot edit.** The quote is signed.

From a design or plan to a quote (quantity takeoff)

Bring a VisionScaper design or measured plan into a quote and see how quantities are worked out from the shapes.

A takeoff turns shapes on a plan into quantities of material and hours of labor. The quantities come from the geometry. AI is never used for them. AI may only help with wording.

Two ways to start

Use one of my designs. On the quote screen, card 2, tap **Use one of my designs**. You pick a design, and its before and after pictures come into the quote together with the list of plants and features in it (the code stores these as the design's assets).

Use the Landscape plan's quantities. If the property has a 2D plan with shapes, card 3 shows **Use the Landscape plan's quantities**. Tap it. If the estimate already has sections you are asked to confirm, because your changes to quantities and wording will be replaced.

Steps

1. Make sure the customer's property has a plan. Open the customer, tab **Work**, property card, **Create a landscape plan**. See the Landscape plans article.
2. Open or create a quote for that customer and property.
3. Tap **Use the Landscape plan's quantities**.
4. Read the toast. It says how many sections were built and lists any item where you need to add your own price.
5. Open **Job cost (internal)**. Check every quantity and price.
6. Open **Customer proposal**. Check the scope wording.

Shapes marked "existing" are reference only. They are not priced unless you also mark them "Remove it". If nothing can be priced you are told so.

What each shape becomes

Shape	Sections the takeoff builds (examples)
Bed	New-bed prep when new, mulch or stone, edging along the perimeter
Stone area	Stone with fabric and delivery
Lawn	Sod (by pallet) or seed
Patio and walkway	Excavation, gravel base, bedding sand, pavers, edge restraint, joint sand, equipment days, delivery, labor
Wall	Wall blocks, caps, base and backfill
Edging	Steel, aluminum, plastic, stone, brick or a natural cut edge
Fence	Fence by the foot, plus gates
Grading	Rough and finish grading, topsoil
Boulders, features, lighting	By count
Plants	By plant type and count

Mulch is the clearest example: the takeoff takes the bed area and depth, converts to cubic yards, adds a waste percentage for settling, rounds up in half-yard steps, and adds delivery loads and labor for prep and spreading. The scope text it writes states the area, depth and quantity.

Where the numbers come from

All unit costs, waste percentages and hours per unit come from your **Price book**. The starting values in the price book are placeholders, not approved. Replace them with your supplier prices and real production rates.

Tips

- Measure first (the Measure tool) so areas are exact.
- The proposal text is editable. Make it sound like you.
- Quantities start at your plan. If you change the plan, press the button again.

If something goes wrong

- **No button.** The property has no plan with shapes.
- **"Nothing to price yet."** All shapes are marked existing. Untick Existing or tick Remove it.
- **A line has no price.** Items with no price in the price book are flagged. Enter your price.

The AI Quoter and "Quote it with AI"

Describe a job and get a first draft of work items, priced from your own price book, saved as a draft quote.

The AI Quoter turns a job description into a list of work with sizes. **The AI never sets a price.** Prices come from your own price book and costs. Every draft is a starting point. The page states: "AI drafts are starting points; review prices and quantities before sending". Nothing is sent to the customer.

There are two places to use it:

- The **AI Quoter** page, under **Customers & Sales** (after Quotes).
- The **Quote it with AI** button inside a quote.

Before you start

- The AI Quoter needs a plan that includes AI quote generation. Which plan is a placeholder, not approved. If it is missing you see "The AI Quoter is not part of your plan."
- The AI needs an AI service key (the page calls it the fal.ai key). Without it the page says "Needs setup: the AI service key is missing", and the button does nothing. Get the key from the provider by following their current instructions, then paste it where the page's setup note tells you.
- A usage line shows "Usage today: N of N AI requests". The page notes a fair-use limit. Picture credits shown are the Design Studio credits and are placeholders, not approved.

Steps (AI Quoter page)

1. Under **1. Who is it for?**, pick a customer. Optionally pick a **Property** and a **Design** from one of that customer's quotes.
2. Under **2. What is the job?**, tap an idea chip (Mulch refresh, New planting bed, Paver patio, New lawn, Fence, Spring clean-up) or write the job in your own words.
3. Tick **Use the measured areas for sizes** if the property has measurements, and **Use the customer's design** if one is chosen.
4. Tap **Write the draft**. It takes about 10 to 30 seconds.
5. Under **3. Check the draft**, read "What the AI assumed" and "Worth checking on site".
6. Edit any quantity, unit cost or line. Add your own price where a line shows it needs one.
7. Optionally tap **Polish the wording with AI**. Numbers are not touched.
8. Choose a customer if you have not, then tap **Create the quote draft**. It opens as a normal draft: "Draft quote created. Nothing was sent."

Recent AI drafts lists drafts made here.

Steps (inside a quote)

1. On the quote, tap **Quote it with AI**.
2. Describe the job, tick what to use, and tap **Create the quote with AI**.
3. If the estimate already has sections you are asked before they are replaced.
4. The new sections open in **Job cost (internal)**, with the AI's assumptions and questions in a box.
5. Each AI section is linked to the closest matching service template when one is found.

Tips

- Add sizes, what to remove and what to plant. Vague descriptions give weak drafts.
- Measure the property first for exact areas.
- Fill in prices the draft flags.

If something goes wrong

- **"Describe the job in a sentence or two first."** Write more.
- **"The AI could not turn that into work items."** Add sizes and details.
- **The button is greyed.** The plan, key or pause state blocks it. Read the banner.

Service templates

Save each service once with scope, price method, materials and checklist, then reuse it on quotes, visits and invoices.

A service template is a saved set of defaults for one service: what it is, how it is priced, what is included, and what the crew checks off. Open **Services** in **Customers & Sales** (subtitle "Reusable service templates & job profit").

The screen

Tabs: **Templates**, **Archived**, and **Job profit** (only if you may see costs). Search "Search services". Templates are grouped by category (Lawn care, Cleanups, Beds & mulch, Planting, Pruning, Hardscape & grading, Lawn renovation and others). Each row shows price, duration and crew size, billing, months offered and "used N×". A star marks a default for its category.

Starter services come with scope and checklists **but no prices**. You add them.

Steps: create a template

1. Tap **New service**. (You need the right to edit templates.)
2. Fill **Service name**, **Category** and **Description**.
3. Under **Pricing method** choose one: **Flat rate**, **Hourly**, **Per unit**, **Tiered by size** (price for each size band) or **Time & materials**. Leave the default price blank to price each job as you add it.
4. Set **Billing frequency**: One-time, Per visit, Weekly, Every 2 weeks, Monthly or Seasonal contract.
5. Enter **Estimated duration (hours)** and **Crew size**, or labor hours per unit for per-unit services.
6. Add **Materials** (name, quantity, unit cost), **Equipment**, **Scope of work**, **Included tasks** and **Excluded tasks** (one per line; excluded show as "Not included").
7. Add a **Completion checklist** and **Employee instructions (crew sheet — no prices)**.
8. Optionally set **Months offered**, **Preferred days**, **Book at least (days ahead)**, and **Book a follow-up visit after (days)**.
9. Optionally write **Customer messages**: a booking confirmation, a reminder before the visit, and a message when the visit is marked Done.
10. Add a **Change note** if editing, then **Save template** (or **Save as new version**).

Other buttons on a row

- **Version history** (clock icon). See the next article.
- **Make default for [category]** (star).
- **Duplicate template** (copies as "name (copy)").
- **Archive**. A template never used can be deleted for good, otherwise it is archived. **Restore** brings an archived one back.

Using a template on a quote

On a quote tap **Add service**. You can use a template, duplicate a previous job, or start from scratch. The template prefills the section. Changes you make then affect only that job. A section shows "from [name] template v[n]". Buttons on the section: **Save as template**, **Update template**, **Unlink**. Quantity can be filled from a property measurement when the template's unit allows it.

Tips

- Costs, markup and suppliers are for the office. The crew sheet never shows prices.
- Crew members need the right to see or use templates.

If something goes wrong

- **No "New service" button.** You lack the right to edit templates.
- **Template has no price.** Quote shows "This template has no price — set the section price."

Template versions and "updated since" notices

Every template edit is a new version; existing quotes keep theirs, and you can compare or restore any version.

Every time you save a service template, VisionScaper stores a new immutable version. A quote, proposal, invoice or finished job keeps a frozen snapshot of the version it used. So changing a template later never changes a quote you have already made.

See and compare versions

1. Open **Services**.
2. On a template row tap the clock icon (**Version history**).
3. The list shows each version, the date and who saved it. The current one is marked.
4. Tap **View** to read a version.
5. Tick two versions and tap **Compare** to see them side by side.

Restore an old version

1. In **Version history** find the version you want.
2. Tap **Restore**.
3. Confirm. It becomes a **new** version (for example version 5), and the history is kept.

Save a change as a new version

1. Edit the template. A **Change note** field says "Saving creates version N+1. Existing estimates, proposals, invoices and jobs keep the version they used."
2. Write a short note, for example "raised mulch depth".
3. Tap **Save as new version**. If nothing changed you see "No changes to save."

"Updated since" notices on quotes

When a quote section was made from a template that is now newer, you see: "This template has been updated since you added it (now v[n]) — apply the latest version?" with two buttons:

- **Apply**: replaces the section's content with the newer template.
- **Keep v[old]**: keeps your version and hides the notice for that version.

This only appears while the quote is a **Draft** or a **Request**. After a quote is sent, viewed or signed it is frozen.

Update a template from a quote

If you improved a section on a quote and want to reuse it:

- **Save as template** creates a new template from the section.
- **Update template** shows what changes, asks for a note, and writes a new version.

Tips

- Always write a change note. Future you will want it.
- Compare before restoring, so you pick the right one.

If something goes wrong

- **No Restore button.** You may be on the current version, or lack the right to edit.
- **A signed quote did not update.** By design, it keeps its version.

The Price book

Enter your supplier prices and production rates once; every automatic quantity takeoff and AI draft uses them.

The Price book holds your costs for materials and your production rates. Every number feeds the automatic estimate: the plan takeoff and the AI Quoter both read it. Find it in **Settings**, group **Prices and quotes**, tab **Price book**. The menu item **Pricing** in Customers & Sales opens the **Costs & markups** tab, which sits right beside it.

> Warning: The numbers VisionScaper ships with are placeholder starting values, not approved and not your prices. Replace them with your own supplier prices and your crew's real speeds before you send quotes.

What is in it

Each entry is a collapsible block. The blocks are: Mulch, Decorative stone, New bed (turf removal and soil prep), Edging, Sod, Seed, Pavers, Gravel path, Retaining wall, Plants, Removals, Boulders, Landscape lighting, Fence, Grading, Delivery, and Final cleanup.

Inside a block you see only the numbers. The labels you will meet are:

Label	Meaning
Cost per unit ($)	What you pay per yard, ton, pallet and so on
Waste / overage (%)	Extra bought to cover settling and cuts
Hours per unit	Labor hours per unit
Prep hours per 100 sq ft	Bed preparation labor
Cost per sq ft ($), Hours per sq ft	For area-priced work
Cost per block ($), Cost per cap ($), Hours per face sq ft	Walls
Fixture cost ($), Transformer cost ($)	Lighting

Pairs of numbers, such as steel edging "3.25, 0.06", are cost per foot and hours per foot, in that order.

Steps

1. Open **Settings**, then the group **Prices and quotes**, then the tab **Price book**.
2. Open a block, for example **Mulch**.
3. Type your **Cost per unit ($)**, your waste percent and the hours per unit.
4. Repeat for the blocks you actually sell.
5. Tap **Save price book**.

To go back to the shipped values tap **Reset to defaults** and confirm. The question is "Reset the whole price book to VisionScaper defaults?".

How it is used

- **Plan takeoff**: shape areas times these rates give quantities and costs.
- **AI Quoter**: the AI lists work and sizes only. The price book prices them.
- **Service templates**: have their own prices. The price book does not override a template.

Tips

- Start with the five you sell most: mulch, stone, edging, sod and pavers.
- Check delivery: it sets the cost per load and how many cubic yards a load holds.
- Update it each season when your supplier changes prices.

If something goes wrong

- **A line needs a price.** An item with no price in the book is flagged on the quote. Add a price in the book or on the line.
- **Numbers did not change on an old quote.** A saved quote keeps its numbers. Rebuild it from the plan to pick up new prices.

Costs & markups: labor, overhead, margin, tax, deposit

Set your labor rate, overhead, markups or target margin, minimum job, sales tax, deposit, rounding and quote expiry.

This is where cost becomes price. Open **Settings**, group **Prices and quotes**, tab **Costs & markups**. The menu item **Pricing** opens it too.

> Warning: The starting values shipped in VisionScaper (labor rate, overhead, markups, margin, tax rate, deposit, minimum job, rounding and valid days) are placeholders, not approved. Enter your own. The sales tax hint says "Your state's rate — e.g. CT 6.35%. Check with your accountant."

Card: Your costs

Field	Meaning
Labor cost per hour ($)	Burdened: wage plus payroll taxes, workers' comp and insurance, per crew member hour
Overhead (%)	Trucks, office and insurance, added on top of direct cost to get true cost
Minimum job ($)	Quotes under this are raised to it
Mobilization per job ($)	A flat charge added to each job

Card: Your price to the customer

First choose **Pricing method**:

- **Markup by category**: a percent on top of each cost type. Fields: **Materials markup %**, **Labor markup %**, **Equipment markup %**, **Subcontractors markup %**, **Disposal markup %**, **Delivery markup %**, **Other markup %**.
- **Target gross margin**: every cost is priced so your gross profit equals the target percent of the price. Field: **Target gross margin (%)**. Margin mode applies overhead and then the margin.

A hint explains that a 50% markup equals a 33% margin.

Then the rest of the card:

Field	Meaning
Sales tax (%)	Your tax rate
Tax applies to	**Whole job**, **Materials only**, or **No sales tax**
Deposit when signed (%)	The share of the total due at signing
Round section prices up to ($)	Each section price rounds up to the next multiple of this, unless you typed your own price
Quotes are good for (days)	Sets the default "Price good until" date on new quotes
On proposals show	**Price for each section** or **Total only**

Steps

1. Open **Costs & markups**.
2. Enter your labor rate and overhead.
3. Pick **Markup by category** or **Target gross margin**, and fill the percents.
4. Enter tax, what it applies to, and the deposit.
5. Set rounding, quote days and what proposals show.
6. Tap **Save costs & markups**.

How the numbers combine

Per section: cost lines add up (labor lines use your labor rate unless you set a rate on the line). Price = each cost plus its markup (or cost with overhead divided by one minus the margin). Section prices round up. Add mobilization, subtract any discount, raise to the minimum job. Tax is a percent of the taxable part. The deposit is a percent of the total with tax.

Quotes show a red gross-profit figure when margin is under 25%.

Expiry

The **Price good until** date on the proposal defaults to today plus your valid days. After that date the customer can no longer sign: the signing page says "This proposal has expired or was withdrawn." The quote shows as **Expired**, and the main button becomes **Send it again**.

Tips

- Pick one method and stay with it.
- Ask your accountant about tax and the deposit.
- You can change the price of any section by hand on a quote.

If something goes wrong

- **Prices too low.** Check the labor rate and the method.
- **Tax shows 0.** Tax may be set to **No sales tax**.

Proposal terms and the payment schedule

Edit the default terms shown above the signature and the deposit and balance schedule, then override them on a quote.

Every proposal shows your terms above the signature box, and a payment schedule. You set the defaults once and change them per quote when needed.

Where

Settings, group **Prices and quotes**, tab **Terms & payments**. It has two cards: **Proposal terms** and **Default payment schedule**.

The starting terms

VisionScaper starts you with a set of editable terms. It covers: what the price includes and that anything not listed is not included; deposit at signing and balance on completion; calling 811 before digging and that private lines are not marked by 811; hidden conditions such as ledge or buried debris being agreed in writing before work continues; a one-year plant guarantee when watered as instructed; written change orders; and the price-valid date. They are generic. Review them with your own advisor. VisionScaper does not give legal advice. Change anything that does not match how you work.

Steps: change the defaults

1. Open **Terms & payments**.
2. Edit the text in **Proposal terms**.
3. In **Default payment schedule** edit each row: a label, a percent, and when it is due (for example "when you sign"). The started pair is **Deposit to schedule** and **Balance**.
4. Tap **+ Add payment** for a milestone, such as a payment when the hardscape is complete.
5. Tap the **x** to remove a row.
6. Tap **Save**.

Make sure the percents add up to 100. The code does not check this for you (not verified in code).

Steps: change them for one quote

1. Open the quote, **Customer proposal** tab.
2. Edit **Terms** (the big box) or the **Payment schedule** rows.
3. Set **Price good until** with the date box.
4. Save.

A new quote copies your defaults when it is first opened. Later changes to the defaults do not alter quotes already made.

What the customer sees

On the proposal page: **Scope of work**, the **Total**, a **Payment schedule** list, a **Terms** card, and the **Approve & sign** box. The statement beside the checkbox reads: "I agree to the scope, price and terms in this proposal and to sign it electronically. I understand my electronic signature is legally binding, the same as signing on paper."

A fingerprint of what they agreed to

When the customer signs, VisionScaper stores a fingerprint (a hash) of the quote number, title, scope, terms, total and payment schedule. If a proposal changes while someone is signing, they are asked to reload.

Tips

- Keep the terms short and plain.
- Use milestones for big hardscape jobs.

If something goes wrong

- **A quote shows old terms.** Edit the terms on that quote.
- **The deposit looks wrong.** The deposit shown is the percent in Costs & markups. The schedule rows are the text on the proposal. Make both agree.

Sending a proposal and customer e-signature

Send a proposal by email or text, and see how the customer views, picks add-ons, signs, and pays the deposit.

Before you start

The quote needs a customer and at least one section. If the quote has no sections you are told "Build the estimate first." Texting needs Twilio set up. If it is not, the **Send by** list shows "Text message (not set up)". Email works without it.

Steps: send

1. On the quote, tap **Send for signature** (the main **Send quote** button opens the same sheet). Use **Send / follow up** for a plain send. If the quote has unsaved changes it saves first.
2. Under **Send to** tick the contacts. The first contact is ticked. Use **+ Add a contact from Customers** or **+ Someone new** for others on the project.
3. Choose **Send by**: **Email**, **Text message**, or **Email + text**.
4. Edit the **Subject (email)** and **Message**. The starter message is filled in with shortcodes.
5. Under **Also include** tick **Before/after picture**, **Total** and **What's included** as you like. The proposal link is always included.
6. Decide on **Follow up automatically if they don't sign**. See the follow-up article.
7. Tap **Send for signature** (or **Send now**). A message says how many contacts it went to and whether any failed.

Shortcodes

Write once, and VisionScaper fills in the details. Type a code in curly braces, for example "Hi {customer_first_name}". Available: {customer_name}, {customer_first_name}, {customer_address}, {customer_town}, {project_name}, {quote_number}, {quote_total}, {deposit_amount}, {quote_link}, {valid_until}, {company_name}, {contractor_name}, {contractor_phone}, {contractor_email}, {month}, {today}. Codes are not case sensitive. A code with no value is sent as written, and a warning lists those.

What the customer sees

The link opens a proposal page with your logo and business name, a status (such as "Awaiting your approval"), the before and after, **Scope of work**, any **Optional** sections with a tick box, the **Total**, a **Payment schedule** and **Terms**. The first time they open it the quote becomes **Viewed**.

To approve they:

1. Tick the optional add-ons they want. The total updates.
2. Type **Your full name** (at least 3 characters).
3. **Draw your signature** in the box. **Clear** starts over.
4. Tick the agreement checkbox.
5. Tap **Approve & sign**. Or **Decline** and, optionally, give a reason.

What happens when they sign

- The quote becomes **Signed**. Add-ons change the total and the deposit.
- The customer's stage becomes **Customer**.
- Scheduled follow-ups are cancelled.
- You are alerted and a line is added to the project conversation.
- A deposit invoice is created. If it was sent and online payments are ready, the customer goes straight to pay it.
- The customer gets a "Signed" email with a record copy.
- The page shows who signed, when, the signature, the IP address and a document fingerprint.

A declined quote cancels the follow-ups too and tells you the reason.

Tips

- Use **Preview** first to see it as the customer will.
- **Copy customer link** only works after the quote is sent.
- A signed quote cannot be edited.

If something goes wrong

- **"This proposal has expired or was withdrawn."** The date passed or you withdrew it. Send it again.

- **"This proposal changed while you were signing."** Ask them to reload.
- **Too many attempts.** Signing is limited per hour per address.

The follow-up plan and reminders for unsigned quotes

Use or edit the six-step follow-up plan so unsigned quotes get nudged by email and text until they sign or decline.

When you send a quote, VisionScaper can schedule a series of follow-up messages for you. They stop on their own when the customer signs or declines.

The default plan

Counted from the day you send it. The times shown are the starting times.

Day	Time	Channel	What it says (summary)
1	10:00	Email	Thanks, here is the full proposal
3	17:30	Text	A quick check that they got it
7	10:00	Email	The before-and-after again, with what is included
14	12:00	Text	We are booking this month's projects
21	10:00	Email	Offers to adjust the plan, phase the work or swap materials
30	10:00	Email and text	"Should I close your file?"

The wording is a starting plan. Change it to sound like you.

Steps: set your default plan

1. Open **Settings**, group **Prices and quotes**, tab **Follow-up plan**.
2. For each follow-up, use the tick box to turn it on or off.
3. Set the **Date** and **Time**, **Send by** (Email, Text or Both) and **To**.
4. Edit the **Subject** and **Message**.
5. Tick what to attach: **Proposal link**, **Before/after picture**, **Total**, **What's included**.
6. Use **Add another follow-up** if you want one more.
7. Tap **Save as my default plan**.

To go back to the original, tap **Reset to the recommended plan**.

Steps: change the plan for one quote

- When sending, the plan appears under "Follow up automatically if they don't sign". Change any date, time, channel, message or attachment, or untick the box to send with no follow-ups.
- After sending, open the quote and the **Follow-ups** list. Tap **Edit follow-ups** and **Save follow-ups**. The message says how many were scheduled.

Each follow-up shows a status such as scheduled, with the error if one failed.

Messages need texting set up

A text step needs Twilio. If it is not set up, the channel list says "(not set up)", and a text step cannot go. Use Email.

Held follow-ups

If your own payment to VisionScaper is outstanding, follow-ups wait. Today shows "N follow-ups were held while your payment was outstanding" and **Review held follow-ups**.

Tips

- Keep messages short and kind. The last one gives a clear end.
- Use {valid_until} so they know when the price ends.

If something goes wrong

- **A follow-up did not send.** Look at its status and error in the list.
- **Follow-ups kept going after they signed.** They should stop. Check the status. Signing and declining both cancel pending ones.

Win/loss tracking and the close-rate report

Record why deals are lost on the Sales board and read close rates by lead source for the last 90 days.

VisionScaper tracks wins and losses from the records you already keep. A **win** is a signed quote. A **loss** is a declined or expired quote, or a customer marked lost. The report sits at the top of the **Sales board**.

The report

It reads: "Last 90 days: N% of finished deals won". Under it:

- A line with **won**, **lost**, **open**, and the dollar total **signed**.
- A row for each lead **source**: deals, won, lost and close rate, with the signed revenue on the right.

Finished deals are the won plus the lost. Open deals are not counted in the rate. The report needs the right to see money. If you do not have it, the board still works but the report is missing.

Record why a deal was lost

1. Open the **Sales board**.
2. Tap a card in **Lead** or **Quoted**.
3. Type the reason in **Why was it lost? (required)**.
4. Tap **Mark lost**.

The reason is kept and shown on the card later as "Lost: reason". A history row and a line on the customer record the move. Nothing is deleted.

When a customer declines from their proposal page, they can give a reason. You get it in your alert and it is added to the customer history as "Customer declined: reason".

Reopen a deal

Tap the card in **Lost**, then **Reopen as a lead**.

What gets counted

Event	Counts as
Customer signs	Won, with the signed total
Customer declines	Lost
Quote expires	Lost
You mark a lead or quoted deal lost	Lost, with your reason
A lost deal is reopened	Back to open

Using the report

1. Look at close rate by source. If one source brings many deals and few wins, ask why.
2. Read your lost reasons. If many say "price", review your markups. If "no reply", review your follow-up plan.
3. Compare sources by revenue, not only by count.

Fill in **How they found you** on every customer. A deal with no source shows as "unknown source".

Tips

- Use the same few words for reasons so you can count them.
- Check the report monthly.
- The odds shown on a card are an estimate the board works out. How they are calculated was not verified in code.

If something goes wrong

- **The report says nothing.** There may be no finished deals in the window.
- **A card cannot be moved.** The board only supports Lost and Reopen. Other moves happen elsewhere.
- **Old deals still count as open.** Declined or expired quotes land in Lost on their own.

Door-to-door canvassing

Mark every house you knock on a map, record what happened, set follow-ups and turn "Wants a quote" into a lead.

Door-to-door is a map where you mark each house you visit and what happened. It is for contractors only. Houses belong to your business and are never shown to homeowners or other contractors. Open it from **Schedule & Field**, **Door-to-door** (subtitle "Map every house you knock").

The screen

Buttons: **Where am I**, **List**, **Follow-ups due**, **Export**. Filter chips show a count for each result. Pins are coloured by result. A small guide on the map says: tap a house; tap what happened at the door, then save; red pins mean "don't knock".

What can happen at a door

Result	Meaning
Flyer left	Nobody answered, a flyer was left
Not home	Nobody answered, nothing left
Talked with them	Spoke with someone
Interested	Wants to hear more
Wants a quote	Ready for an estimate. Becomes a lead
Call back / come back	Asked to be contacted later
Not interested	Said no for now
Already a customer	Already works with you
Uses another company	Has a landscaper already
Vacant / for sale	Empty, for sale or under construction
Can't reach the door	Gate, dog or no access
Do not come back	Asked not to be visited again
No soliciting sign	Posted sign

Extra tick boxes: **Flyer / door hanger left**, **Business card given**, **Spoke to the owner**, **Renter / tenant**, **HOA neighborhood**, **Needs lawn care**, **Beds / mulch need work**, **Hardscape opportunity**, **Tree work needed**, **Snow removal prospect**.

Steps: log a knock

1. Tap **Where am I**, or zoom to the street.
2. Tap the house on the map. The address is looked up.
3. Tap what happened. A follow-up date fills in for some results (interested, call back, quote, flyer, talked).
4. Add **Name**, **Phone** and **Email** if you got them.
5. Add notes, for example "needs mulch, dog in yard".
6. Tick any extras.
7. Tap **Save this visit**.

Follow-ups

Tap **Follow-ups due** to list houses whose date is today or past. A bell ring marks pins due by tomorrow.

Safety rules built in

- **Do not come back** and **No soliciting sign** show a red warning if you tap the house again, and never get a follow-up date.
- A house is never saved twice on one door.
- A knock logged with a poor connection is saved once, even if it retries.

Turn a quote request into a lead

When you save **Wants a quote** with a name and a way to reach them, the house becomes a customer lead automatically on the website. You see "Added to your customers as a lead." The phone app shows a duplicate check first.

Tips

- Use **Export** to download your list as a file.

- Filter to one result to plan your return visits.

If something goes wrong

- **"Tap the house on the map first."** You tried to save without a location.
- **"Someone else changed this house."** Reload it and try again.

Measure Property from above

Trace lawns, roofs, beds and driveways on an aerial map, save the report to a customer, and start a quote.

Measure lets you trace areas on an aerial photo and get square footage and perimeter without visiting. Open **Design Studio**, then **Measure** (the full name is **Measure property**; subtitle "Lawns, roofs, beds & lots from above").

The imagery is to-scale aerial photos. The screen says Connecticut 3-inch state imagery is used there, USGS elsewhere, or the provider set in Settings. They are served as map tiles by this site. Measured from above, on slopes the real ground is a little larger and trees can hide edges.

Steps

1. Under **Find the property**, type the street address and pick it from the list. You can also start from a customer's page with **Measure property**.
2. The map opens on the property. Drag to move. Pinch, scroll or use the plus and minus to zoom. The map keeps loading so you never see blank space.
3. Choose **What is it?**: **Lawn / grass**, **Roof**, **Planting bed**, **Driveway**, **Patio / walkway**, or **Whole property**.
4. Tap each corner around the edge of the area.
5. Tap the yellow **Start** dot to close the shape.
6. Name the area.
7. For a roof choose the **Roof pitch (rise per 12 in.)**, for example "3/12 (low)", "6/12 (common)", or "12/12 (steep)", or "Flat / not a roof". From above a roof looks smaller than it is. The pitch gives the real roof surface and roofing squares.
8. Tap **Save & measure another area**, or **Save & finish**.

The running list shows **Measured areas** and a **Total**. A shape that is too small is rejected. An unclosed shape asks if you want to finish without it. **Discard this shape** removes one.

Finish: what would you like to do

Choice	Result
Create a new contact	Adds a customer with this address and keeps the measurements on their page
Attach to existing contact	Step 1 pick the contact, step 2 pick which property
Save to this device	Downloads the report picture
Print	One page with the map, every area and the total

The report picture and areas appear on the customer page, tab **Work**, section **Measurements**. The Measure screen also has a **Start a quote** button and a **Google Maps** link for reference (exactly where each appears was not verified).

Notes

You can add **Notes for the report**, for example "back lawn slopes; check the fence line on site".

Tips

- Zoom in before tracing curves for a closer fit.
- Measure each area separately so you can price them separately.
- The AI Quoter and the quote screen can use the measured areas for exact sizes.

If something goes wrong

- **"Couldn't find that address on the map."** Check the address.
- **"Allow pop-ups for this site to print."** Allow them, or use Save to this device and print the picture.
- **Imagery looks old.** It is what the provider has.

Landscape plans: the 10-step measured plan wizard

Build a measured 2D landscape plan from aerial imagery, a tape check and site photos, ready to turn into a quote.

A plan is a measured 2D drawing of a yard with plants, beds and hardscape, ready to quote. The screen says it takes about 15 minutes in the office and 10 on site. Open **Design Studio**, then **Landscape plans** (subtitle "Step-by-step measured 2D plans"). You can also start from a customer's property card with **Create a landscape plan**.

The wizard saves as you go, on this device and on the property, so a plan started in the office can be finished on site.

The steps

#	Step	What you do
1	**Customer & property**	Pick or add the customer and the full property address
2	**What to plan**	Pick areas: front yard, back yard, left side yard, right side yard. Planting beds and plants are always included
3	**Bird's-eye base map**	Load the aerial for the address and drag the map so the house is in the middle
4	**Trace the property**	Tap corners, or let AI try to find outlines (if AI is on); drag any dot that is off
5	**Check the scale**	Check against one tape measurement
6	**Site photos**	Take guided photos
7	**Site details**	Zone, sun, deer, drainage, irrigation, HOA, what to keep
8	**Style**	Pick a style card
9	**Designs**	Optional designs per area
10	**Generate & review**	Check the summary and generate the plan

Tips for the hard steps

Scale (step 5). The wizard says to find something flat you can measure on site. The driveway width at the street is ideal. A survey from the closing papers or the town hall gives the most accurate property lines. If you skip the tape check, the plan is marked less accurate.

Site details (step 7). You set the USDA zone (the screen points to planthardiness.ars.usda.gov if you are unsure) and the sun for each area. Plant choices follow the zone, sun and deer.

Photos (step 6). Daylight, sun behind you or to the side. Hold the phone sideways, at chest height, level. Move cars and bins out of the shot. If you cannot reach a spot, tap **Can't get this one** and say why. Photo checks flag problems for you.

Style (step 8). Each card shows how many library plants fit this site. The star suggestion fits the site and the maintenance the customer wants.

Before generating (step 10). Anything marked ✖ must be fixed first. Tap it to go there. Remember to call 811 before digging. The summary reminds you.

After the plan is generated

You review it in the editor. Drag anything to adjust. **Generate again** replaces changes you made in the editor, and asks first. Then, on the quote, tap **Use the Landscape plan's quantities**. See the design-to-quote article. The screen also says "Build the quote straight from the plan."

Steps: start a plan

1. Open **Landscape plans** and tap **Start your first plan** (or **Re-run wizard** for a property that has one).
2. Search or add the customer, pick the property.
3. Go step by step. Required parts are marked •. **Continue** or **Next part** is blocked until they are done, with a reason.
4. At step 10 tap **Generate the plan**.

If something goes wrong

- **"Pick the property address."** It needs house number, town and state.
- **"AI couldn't find it — trace it by tapping the corners."** Trace by hand.
- **Plan looks the wrong size.** Recheck the scale. Re-draw the tape line.
- **Aerial is missing.** The Bird's-eye step offers other ways to measure, or skip and measure on site.

Walk estimates and voice-note summaries (phone app)

Record a property walk by dictation and photos, let AI propose services, and review each line before one draft quote is made.

A **walk** is a property walk-through you dictate and photograph. A crew leader or manager walks the property, dictates with the phone keyboard's microphone, and takes photos. VisionScaper keeps the transcript as a "walk". These features are built into the VisionScaper phone app's server routes (named mobile/walk and mobile/voice). No Hub screen for them was found in the web Hub code, so the exact button labels in the phone app are not verified here.

> Warning: The AI is off by default. An owner switch and an AI service key are needed. Without them you can still build the lines by hand from your services.

How a walk works

1. **Create the walk.** Pick the customer (and property), then type or dictate the transcript. The limit is 6,000 characters. If you need more, split it into two walks.
2. **Add photos.** They are private to the office.
3. **Ask for a draft.** The AI proposes which of your own services the walk talked about.
4. **Review every line.** Each line can be accepted, rejected, edited (a quantity) or left pending. You can add a service of your own that the AI missed.
5. **Save.** One draft quote is created, only when every line has been decided by a person. It is never sent.

What the AI is and is not allowed to do

- It names only service ids from your own list. Anything not an active service of yours is dropped.
- It never sets a number. A quantity comes only from a measured area, or from a number actually spoken in the transcript. Otherwise the line has no quantity.
- Every line is priced by VisionScaper from your own template and rates, never from anything the AI wrote.
- Photos and the customer record are never sent to the AI. Spoken emails and phone numbers are removed first.
- Lines stay pending until a person decides.

Cost controls

The switch is off by default. There is a cap on AI calls per day in total, and a daily cap for walks of their own. The walk is rejected with a plain message once it is reached.

Voice-note summaries

A separate feature (voice summary) turns a dictated note into a summary with suggestions. It saves nothing by itself. If AI summaries are not switched on, you are told "Your note can still be saved as it is." Say or type at least a few characters first.

Steps (owner): turn it on

1. Make sure the AI service key is set up. Get it from the provider by following their current instructions.
2. Turn on the walk AI switch. The switch name is "walk_ai". Where it sits in Settings was not verified in code.

Tips

- Speak sizes aloud: "front bed, about forty feet long". Spoken numbers are used.
- Review each line against the property. The AI can misunderstand.
- A saved walk cannot be saved again as a quote.

If something goes wrong

- **"AI walk drafts are not switched on for this site."** The owner must turn the AI on.
- **"This walk changed since you opened it."** Reload and look again.
- **"This walk is already saved as a quote."** Open the quote instead.

The customer portal (My Projects) and the look of proposals

What a customer sees in their portal, what they can do there, and how to put your brand color on proposals and invoices.

A customer with a VisionScaper account sees their work with you in **My Projects**. It reads from the Hub every time and keeps no copy. A customer without an account uses the private links in your emails and texts.

What the customer sees

The portal shows only what you have chosen to show. It has no costs, internal notes, crew names, drafts, or other customers' records.

Block	What is in it
Quotes	Quotes you sent, with the scope of each section, total, "good until" date, and a **View proposal** link. A request they sent shows as **Requested**
Visits	Upcoming and past visits of the kinds a customer knows (consult, site visit, estimate, job, maintenance, follow-up). No internal titles, crew names or notes
Invoices	Number, title, amount, balance, status, due date and a **Pay online** link when a balance is open
Photos	Job photos you have marked as shared with the customer
Autopay	Whether automatic payment is on and where this customer stands
Referral	A personal link to your request form

Their other tools include **My Calendar** and **My Property**.

What the customer can do

- **Sign a quote** you sent them. They approve and sign inside the portal, the same as on the link.
- **Ask for more work.** The request lands as a lead on the customer record they already have. It does not create a new customer. They can add best times.
- **Share their personal referral link.** A friend who uses it becomes a normal new lead with the source "referral". The reward text comes from your marketing settings.
- **Review the work** after a job, with an optional photo.

Steps: see what a customer sees

1. Open the quote and use **Preview**, or **More** and **Preview what the customer sees**.
2. Open the customer page. A "VisionScaper" mark by the name means they have an account.

Steps: put your brand color on customer pages

1. Open **Settings** and the tab **Appearance & layout** (group **Business**).
2. Choose to change the look for your business. Set your brand colors.
3. Publish. The button is **Publish**. A check makes sure colors stay readable.
4. On the card **Your customers' pages**, tick "Use my brand color on proposals, invoices and other pages my customers see".

Only your brand color carries over, adjusted so it stays readable in light and dark. Your internal layout never changes what customers see. It shows once the business look is published. If you untick it, "Customer pages use the standard look."

Your logo and business name show on the proposal page header, and contact details appear under the name. Add them in **Business profile**.

Tips

- Add a clear logo and phone first.
- Check a proposal on your own phone before sending a big one.

If something goes wrong

- **Brand color does not show.** The business look must be published, and the box ticked.
- **Customer cannot see a quote.** Drafts and requests do not show a link. Send it first.
- **Customer sees an old photo list.** Only photos marked shared appear.

Importing customers: CSV, vCard and Google Contacts

Bring customers in from a file or from Google Contacts, check duplicates, and undo an import within 7 days.

You can bring customers into VisionScaper from a file (CSV or vCard) with no setup, or connect Google Contacts for a live link.

Import a file

Open **Customers**, tap **Import / Export**, then **Import**.

1. Choose **File to import**. A **CSV** works from QuickBooks, Google, Jobber, LMN, Yardbook, Excel or another CRM, as long as it has a header row. A **vCard** (.vcf) can hold one or many cards from an iPhone, Android, Outlook or Gmail. The limit is 5 MB. Larger files: split them.
2. **Match columns.** VisionScaper guesses. Under **Column in your file** and **Goes into**, change any. You can pick **Use a saved mapping…**, or name and **Save this mapping**.
3. Choose what new customers are marked as, such as **Potential customer** or **Past customer**.
4. Check **2. First 10 rows, as they'll be imported**.
5. Tap **Next: check for duplicates**. Rows are matched to **Already in your list**, plus **Repeated in the file** and **Can't import**.
6. Choose what to do with each match, or for all: **Update empty fields only**, **Overwrite with the file**, **Skip**, or **Create anyway**.
7. Import. It runs in batches with progress. The finish page says **Import finished**.
8. New addresses become properties, mapped in the background so aerial views and measuring are ready shortly.

To undo, open **Recent imports** and tap **Undo this import**. Customers it added are removed unless they were changed or used since. Customers it updated keep their changes. Undo is open for 7 days.

Export

Export downloads **All customers**, the filtered list, or only the ones you ticked with **Select**. Choose CSV (and the columns), or vCard. The CSV opens correctly in Excel, and cells starting with = + - @ get an apostrophe so a spreadsheet never runs them as formulas.

Connect Google Contacts (live link)

Open **Settings**, tab **Connected apps**. The card **Google Contacts** has a **Set-up walkthrough** that says "4 steps, about 10 minutes". Follow Google's current instructions. In outline:

1. Enable the People API in Google Cloud.
2. Set up the OAuth consent screen (External) with the contacts scope, and set it to production, otherwise Google disconnects you every 7 days.
3. Create an OAuth client ID of type Web application. Add the redirect address shown in the card.
4. Paste the **Client ID** and **Client secret** into VisionScaper, **Save settings**, then **Connect**. Google may warn the app is not verified. It is your own app.

Then choose **How data moves**: Import only, Export only, or Both ways. Optionally fill **Only import contacts with this Google label**, which keeps family and friends out. Exported customers go into a label called "VisionScaper Customers". Tick **Update automatically every hour** if you want it. **Pass on deletions** is off by default, which is safer. **Update now** syncs on demand. Items that clash show as "needs review".

Tips

- Try a small test file first.
- Keep **Pass on deletions** off.
- Keys are stored encrypted and never shown again.

If something goes wrong

- **"That file is larger than 5 MB."** Split it.
- **Google disconnects every week.** The consent screen is still in testing. Set it to production.
- **Reconnect warning.** Permission expired. Tap **Reconnect**.

Your Find a Local Contractor listing and the requests it brings

Apply to be listed, fill your profile, receive homeowner requests as Requests, and handle them.

Find a Local Contractor is the list homeowners search inside VisionScaper. They see ratings, reviews, finished designs, services and distance, then tap **Request a quote**. A request lands in your Hub as a quote with the status **Request**.

Get listed

Any landscaping or hardscape contractor can apply. The screen says your license and insurance are checked before approving.

1. Open the Hub and go to **Apply** (shown if your account is not yet approved), or **Settings** and **Business profile**.
2. Fill **Business name**, **Your name**, **Business phone**, **Business email**, **Website**, **Years in business**.
3. Fill **License #** and tick "We carry general liability insurance".
4. Under **Where you work** set the address, town, state, ZIP and **Service radius (miles)**.
5. Tick your **Services**: Landscape design, Planting, Mulch & stone, Lawn installation, Patios & walkways, Retaining walls, Landscape lighting, Fencing, Drainage & grading, Tree work, Lawn care.
6. Write **About your business**. Add a logo.
7. New applicants tick both agreements: the Terms of Service, and keeping contractor-only information confidential.
8. Tap **Apply to be a VisionScaper contractor**. While pending, the page says "Your application is being reviewed" and you are emailed when approved.

What homeowners see

Your logo, town, distance, star rating, jobs done, Licensed and Insured badges, services, social links, and "Pay online" if you take online payments. Finished jobs you mark "show this job" appear on your public profile. In the list, up to 3 social links show on your card, and all of them on your page, proposals and invoices.

If you are not taking requests, your listing says "Not taking new requests right now". That happens when your account cannot take writes or you have used up your monthly requests allowance. The allowance is a plan limit (placeholder, not approved).

Handle a request

1. Open **Quotes**, filter **Requests**. Or use the row on **Needs you**.
2. Open it. The request card shows the homeowner's message, timing, budget and photos, and the plants in their design. A fuller brief shows services, budget, timing, contact, priorities (must have, nice to have) and a completeness score.
3. Tap **Message them**, **Book a site visit** or **Ask for missing details**.
4. When ready tap **Build the quote** (the main button).
5. A conversation also starts in your Inbox, preloaded with the brief.

Tips

- Add your own intake questions so briefs arrive complete.
- Reply fast. The Inbox shows how long a customer has waited.
- Keep your service radius honest.

If something goes wrong

- **Not in the list.** You may still be pending, or outside the searcher's area.
- **Listed as not accepting.** Check your plan's monthly allowance.
- **A request has few details.** Use **Ask for missing details**.

Asking customers for reviews

Send review requests automatically or by hand, share a QR link, and see how happy and unhappy customers are handled.

VisionScaper can ask customers for reviews at the right moment, from any step of a job. Open **Marketing & Growth**, then **Marketing**, tab **Reviews**.

How a review request works

The customer gets a short message with a link. The page asks for a star rating first. Happy customers are sent to your Google page (and Facebook or another site you add). Anyone who had a bad experience can also send private feedback straight to you, and you are alerted. Every customer is still offered the public review sites. The code states this is because Google and the FTC forbid "review gating".

Set it up

1. In **Marketing**, open **Reviews**.
2. In the card **Where reviews go**, paste your link into **Google**. The hint says: in Google Business Profile get the review link and copy it. Follow Google's current instructions. A Place ID also works.
3. Add **Facebook**, or **Another site — name** and **Another site — link**. Tap **Save links**. The **Test** buttons open each link. Yelp is not offered. The screen says it does not allow asking.
4. There is also a switch, "Also offer a VisionScaper review (with photos)".
5. In the card **When to ask** switch on what you want: - **Review requests are on** (the master switch) - **When a job is marked Done** - **When the final invoice is paid** - **During maintenance, after every N completed visits**
6. Set **Wait N days after the job before asking**.
7. Choose **Send by**: **Best channel**, **Text** or **Email**.
8. Switch on **One reminder if they don't answer, after N days** if you want.
9. Set **Don't ask the same customer more than once every N days**.
10. Switch on **Alert me right away about ratings of 3★ or less**.

Ask by hand

A **Ask for a review** button is on every customer, finished job, paid invoice and appointment. Tap it, choose **Send by** and **When** (**Now**, or **On my usual delay**), then **Send review request**.

If they were asked recently, or already reviewed this job, you are told and offered **Send anyway**.

You can also use the tag {review_link} in any message.

A link and a QR code

The page gives you a public review link with **Copy link** and a QR code to print for leave-behind cards, invoices, business cards and truck magnets.

Text messages and consent

Texting uses Twilio. Marketing texts need written permission. The customer page has a Marketing card with the text consent state and a **Record text consent** button. Review requests themselves are a different flow from marketing texts, so check the setting wording for your situation (not verified in code).

See results

The top of the tab counts Asked, Opened, Rated (with the average), Went to Google / Facebook, Private feedback and Scheduled. **Recent** lists each customer with a status: scheduled, asked, opened, rated, opened a review site, sent feedback, not sent or cancelled. Feedback text shows under the name. Ratings of customers also appear on Today under **Reviews**, with a **Reply** button.

Tips

- Ask soon after a good job and a happy goodbye.
- Respond to every low rating the same day.

If something goes wrong

- **Nothing sent.** The master switch is off, or Marketing is not set up yet.

- **"They were asked for a review recently."** Wait, or send anyway.
- **No Google page opens.** Add the link under **Your Google review link**.

Jobs, crews & field work

Scheduling, routes, time, purchasing, equipment and training.

The Jobs screen: from signed quote to finished job

How signed quotes become jobs, how the Jobs list is grouped, and what you can do on a job.

In VisionScaper, a job is a quote your customer has signed. Signed quotes land on the **Jobs** screen so you can schedule them, track what they cost and invoice them.

Where to find it

Open the Contractor Hub, go to the **Customers & Sales** group in the left menu, and choose **Jobs**.

How the list is grouped

The list is split into groups. A group only shows when it has jobs in it.

Group	What it means
Ready to schedule	Signed, but no visit is booked yet
Deposit paid – ready to schedule	Signed and the deposit is in
Scheduled	A visit is on the calendar
In progress	Work has started
Done	Marked finished
Cancelled	Called off

If the screen is empty, it shows "No jobs yet" and a button to go to your quotes.

Steps: work a job from start to finish

1. Open **Jobs** and tap a job. This opens the quote with a **Job** card.
2. Check the line "Job status". Change it with the button at the top of the quote. The card tells you this itself: "change it with the button at the top".
3. Under **Visits**, tap **Schedule a visit** to book a day. You can also book from the Calendar (see "Calendar month view").
4. As work happens, enter real costs under **Job costing — actual costs** (see "Job costing: actual costs").
5. Add finished photos under **Finished photos** with **Add photo**.
6. Tap **Save job**.
7. Invoice the job from the **Invoices** list on the same card.

When a job is marked done, the customer is told automatically and asked for a review on your timing, according to the screen's own description.

Tips

- Tick the box to show this job (design plus finished photo) on your public page if you want to use it as a showcase.
- A job with a signed proposal also shows its next step in a status line at the top when you open it from Field work.
- The crew sees the job in **My work** only after you assign people to its visit.

If something goes wrong

- **A signed quote is not on the list.** Check that the quote status is signed. Draft and sent quotes are not jobs yet.
- **You cannot edit the quote text.** A signed quote is locked on purpose. Use job changes for extra work.
- **The status will not change.** Use the status button at the top of the quote, not the Job card.

Job costing: entering actual costs on a job

Enter materials, crew hours, equipment and other costs on a job and see variance and gross profit against your estimate.

Job costing compares what you estimated with what the job really cost. You can type actual costs by hand on the job's quote, and VisionScaper also counts time and materials your crew records in the field.

Before you start

- The job must be a signed quote (see "The Jobs screen").
- Set **Labor cost per hour ($)** and **Overhead (%)** in **Settings → Costs**. The quote's cost math uses them.

Steps

1. Open **Jobs**, then tap the job.
2. Scroll to the **Job** card, then **Job costing — actual costs**.
3. Fill in the boxes you know. Each shows the estimate underneath: - Materials $ - Crew hours - Equipment $ - Subcontractors $ - Disposal & delivery $ - Other $
4. Watch the summary boxes update as you type: - **Estimated cost** - **Actual cost so far** - **Variance** (turns red when actual is over estimate) - **Actual gross profit** with a percent (red under 25%) - **Hours: est / actual**
5. Tap **Save job**.

How the math works

Actual cost is materials plus crew hours times your labor rate, plus equipment, subcontractors, disposal and other, all multiplied by one plus your overhead percent. Gross profit is the quote price minus that actual cost.

> Note: This is the quick, manual version on the quote. The Field work screens add a second, record-based view with approved time and logged materials. See "Job profit".

Tips

- Enter costs as the job goes, not at the end.
- If you buy materials on a purchase order, record the bill there. The cost is not counted twice (see "Purchase orders").
- Use "Plan vs actual" to see cost against each section of the quote.

If something goes wrong

- **Numbers look too low.** Crew hours come from the box you typed. Hours the crew clocked are shown in Field work → Job profit.
- **Gross profit shows odd values.** Check that the quote has a price and that your labor rate is set.

Calendar: month view, list view and the day menu

Use the Calendar's Month and List views, tap a day to book work, and block time off.

The **Calendar** shows every visit: job days, appointments, estimate visits and time off.

Where to find it

Hub left menu, group **Schedule & Field**, then **Calendar**.

Month and List

At the top are two tabs: **Month** and **List**. VisionScaper remembers the one you used last on that device.

- **Month** is a grid, Monday to Sunday. Each day shows up to three small chips for its visits, then "+N more". A day with hours booked shows the total, and a day that fills your working hours is marked full.
- **List** shows the next four weeks, with a **+ Visit** button, **← Earlier**, **Today** and **Later →**. Each row has a directions link and a call button when the customer has an address or phone.

Steps: book something on a day

1. Open **Calendar** in Month view.
2. Tap a day. A day menu opens. It says how many visits are booked and about how many of your working hours are free.
3. Pick an action: - **New job day** (crew on site, full or part day) - **Schedule a signed job** (only shows when you have signed jobs waiting) - **New appointment** (consultation or meeting) - **Site visit** - **Maintenance visit** - **Follow-up visit** - **Door-to-door session**, or **Open the door-to-door map** - **Block time off** (vacation, holiday, rain day)
4. Fill in the visit window and save.

Tap a chip instead of the day to open that visit.

Tips

- Keyboard: arrow keys move between days; Enter opens the day menu.
- Booking a visit puts it on the customer's VisionScaper calendar and plans their reminders automatically.
- Set your working hours in **Settings → Crew & hours**. The default shown in the code is 7 AM to 5 PM.
- Signed jobs that still need a date are counted above the grid.

If something goes wrong

- **No signed jobs offered.** The menu item appears only when a signed job has no visit yet.
- **A past day.** The menu warns you the day has passed. You can still log something that happened.

Appointment reminders to customers and to you

Set how long before each appointment customers and you are reminded, and by which channel.

VisionScaper plans reminders for every appointment you book. You set the schedule once.

Where to find it

Settings → Reminders.

Steps

1. Open **Settings → Reminders**.
2. Under **Reminders to your customers**, set each rule: a number, a unit (minutes, hours or days) and the word "before".
3. Tick the channels for that rule: **Email**, **Text** and **In-app**. Text is greyed out if it is not on your plan or not set up.
4. For customer rules you can narrow a rule to certain appointment types.
5. Under **Reminders to you**, add rules for yourself with **+ Add a reminder for…** (the in-app channel is the starting choice).
6. Under **When you book, move or cancel**, tick whether to tell the customer automatically.
7. Tap **Save reminder schedule**. The screen tells you how many reminders it planned for upcoming appointments.

Rules the screen states

- Texts never go out between 9 pm and 8 am. A reminder that would land overnight is sent at 8 pm the evening before.
- Your plan may limit how many reminders each appointment can have. The screen shows the limit when you reach it (the number depends on your plan).
- You can change the schedule for one appointment when you book it.
- The wording is edited in **Messages & alerts → Appointment reminder**.

Tips

- Each visit's editor shows a one-line summary of which reminders are planned.
- Reminders are rebuilt when an appointment changes and are never sent twice, according to the code notes.

If something goes wrong

- **Text is unavailable.** Messaging has to be set up first and your plan must include it.
- **A reminder did not arrive.** Check that the customer has the channel's contact detail on file.

Subscribe to your schedule in Google, Apple or Outlook calendar

Get a private link that keeps your VisionScaper schedule in your own calendar app.

You can subscribe once so your whole VisionScaper schedule, and any change you make, shows in your own calendar app.

Before you start

This feature may depend on your plan. If it is locked, the screen shows a note instead of the button (which plan is not verified in code).

Steps

1. Open **Calendar** in the Hub.
2. Tap the button 🔄 **From calendar** (the full name is **Update from calendar**). It sits at the top of the Month view.
3. A window opens. Choose one: - 🍎 **Apple Calendar / Outlook** opens a webcal link. - **Google Calendar** opens Google's page to add the calendar. - Or copy the private link with **Copy link**, then paste it in your app's "Subscribe" or "From URL" option.
4. Confirm in your calendar app.

You can also reach the same window from **Settings → Reminders**, under "Your schedule in your own calendar".

Customers have it too

Homeowners get **My Calendar** with every appointment from any contractor, plus an **Add to my calendar** menu on each one: **Google Calendar** or **Apple / Outlook (.ics file)**.

Tips

- Your calendar app decides how often it refreshes. VisionScaper cannot force an instant update.
- The feed is read-only. Change visits in VisionScaper.

If something goes wrong

- **You shared the link by mistake.** Anyone with the link can see your appointment times. Tap **Make a new private link**, confirm, then subscribe again. The old link stops working.
- **Nothing shows up.** Make sure the subscription used the new link, and wait for your calendar app to refresh.

Field work overview: the tabs and who sees them

What each Field work tab does and how your role decides which tabs you see.

Field work is the office side of running crews: today's jobs, who works where, hours, your team, checklists and job profit. Your crew uses the phone side, called **My work**.

Where to find it

Hub left menu, group **Schedule & Field**, then **Field work**. Managers can also reach it from **My work → Office**.

The tabs

Each tab shows only if your role allows it, and the server checks again.

Tab	What it is for	Needs this right
Today	The day's dashboard	See every job
Assign crew	Who does the job, and when	Assign people
Hours worked	Review and approve time	Approve hours
Team	Employees, crews, availability, cost rates	Manage employees
Location	Live map and mileage	See live location or history
Purchases	Orders, vendors and receiving	Purchase orders
Plan vs actual	Costs against the plan	See money
Expenses	Approve expenses	Approve expenses
Checklists	Field forms	Edit checklists
Job profit	Estimated vs actual by job	See money
Settings	Owner-only options	Owner

The money tabs (Purchases, Plan vs actual, Expenses, Job profit) also live in **Finance & Reports** in the left menu. In the owner view they show beside the other tabs.

If your role has no office tools, the screen says "Your role doesn't include office tools. Ask the owner."

Steps: give someone the right tabs

1. Go to **Settings → Crew & hours**.
2. Under **Team permissions**, tick the rights for Manager, Leader and Crew.
3. Tap **Save permissions**.

You, the owner, can always do everything.

Owner Settings tab

It holds: company time zone, week start day, how long before forgotten timers close, what people clock in for, when a job counts as late, whether finished jobs need approval, whether before and after photos are required, how materials count in job costing, overhead display, the labor-overrun warning percent, and field alert choices.

Tips

- Each tab has a small help question mark with a three-line explanation.
- "Show me" settings can hide the Purchases and Location tabs until you switch them on.

If something goes wrong

- **A tab is missing.** Your role lacks that right. Ask the owner.
- **Crew do not see their jobs.** Link their VisionScaper account in the Team tab and assign them to the job.

Field work Today: your daily dashboard

Read the Today tab to see scheduled, late, blocked and finished jobs, who is on the clock and what is waiting.

The **Today** tab answers "what is happening right now?" for one day.

Where to find it

Field work → Today. It needs the right to see every job.

What you see

At the top, use ‹ and › to change the day. The **Today** button jumps back.

Count tiles. Tap a tile to filter the job list below it. Tap again, or tap **Show all**, to clear. - Scheduled - In progress - Late - Blocked - Awaiting approval - Needs follow-up - Completed

Late, Blocked and Awaiting approval turn into an alert when their count is above zero. A job is "late" after a number of minutes you set in Field work → Settings.

Cards below the tiles: - **On the clock now**: who is clocked in, for what (job work, travel, prep, shop or break), and since when. - **Not assigned**: jobs with nobody on them, plus an **Assign people** button. - **Who's on what**: each person with their jobs and times. - **Over the labor estimate**: jobs where recorded hours passed the estimate. - **Hours worked**: how many weeks wait for approval, and how many entries were closed automatically after a missed clock-out. - **Unfinished checklists**.

Steps: open a job

1. Tap any job row. The row shows the time, title, customer, address and crew.
2. The job card opens. As the office you also see the Crew & time box with **Change the time**, plus costing and an activity timeline.

Tips

- Use Today first thing each morning, then work down the alert tiles.
- Your crew uses **My work** on their phones. They sign in with the VisionScaper account you linked in Team and see only the jobs you assign.

If something goes wrong

- **"No jobs on this day."** Book visits on the Calendar.
- **A person is missing from "On the clock".** They have not started a timer. See "Clock in and out".

Assign crew and use suggested times

Put people on jobs, see who is available, change a job's time, and let VisionScaper suggest crew and slots.

The **Assign crew** tab is a board for one day. It shows each person's availability and each job's crew.

Where to find it

Field work → Assign crew. You need the right to assign people and reschedule.

Steps: assign people to a job

1. Open **Field work → Assign crew**.
2. Use ‹ and › to pick the day. The header says how many jobs there are and how many are unassigned.
3. Read the **Availability** card. Each person shows their hours and job count, or the reason they are off ("Time off" or "Not a work day").
4. On a job box, tap a name to add or remove that person. A greyed tooltip shows why someone is unavailable.
5. A warning line appears under the job if someone you picked is off.
6. The change is saved and people are told about it.

Done and cancelled jobs are locked.

Steps: change the time

1. On the job, tap **Change the time**.
2. Set **Start** and **End**.
3. Tick **Tell the customer** if you want them notified. Assigned employees are told automatically.
4. Tap **Move job**.

Steps: get suggestions

1. On a job with nobody assigned, tap **Suggest times**.
2. Choose how many days to look at (3, 7 or 14) and, if needed, how many hours the job needs.
3. Review each suggestion. The label says **Drive measured** only when a routing service answered. Otherwise it says **Drive: estimate** or **No drive figure**.
4. Tap **Assign this** on the one you want. The code notes say suggestions never write anything on their own.

The board also has a "Jobs with no crew" view that lists open jobs starting in the next 3 days with nobody assigned (how to open it is not verified in code).

Tips

- Suggestions consider working days and hours, days off, time-off blocks, jobs already booked and the drive between stops. Real traffic is not modelled.
- A crew of two or more people needs the same team name with enough active members.
- Turn schedule-change alerts off with **Tell employees when their schedule changes** in Field work → Settings.

If something goes wrong

- **"Someone changed this job."** Reload; the suggestion was based on an old version.
- **No suggestions.** The job may be missing a length. Type hours in the box.

Review and approve hours worked

Check each person's weekly hours, fix entries with a reason, and approve, send back or reopen a week.

Time that your crew records is grouped by week. You review it, fix problems and approve it. Approved time becomes final in job costing and is the only time that can be exported for payroll.

Where to find it

Field work → Hours worked. You need the right to approve hours.

Steps: approve a week

1. Open **Hours worked**. The header shows the week, total paid hours, hours on jobs and, if you can see money, labor cost.
2. Use ‹ and › to change the week.
3. Look at **Waiting for approval** at the top. Tap a person to open their week.
4. Check each day. Entries marked "auto-closed" or "needs end time" need your eye.
5. Tap ✔ **Approve**, or tap ↩ **Send back** and write what needs fixing (they see it).

Each person row shows paid hours, hours on jobs, entry count, clocked-in status, flags and a status: Not submitted, Waiting, Approved or Sent back.

Steps: correct an entry or add missed time

1. Open the person's week and tap an entry, or tap **+ Add missed time**.
2. Change Start, End, Activity or Job.
3. Type a reason. It is required and kept with the change.
4. Tap **Save correction** or **Add time**.

To remove an entry, use the remove button and give a reason (a very recent entry needs none).

Reopen

On an approved, submitted or sent-back week, **Reopen** asks "Why reopen this week?" and keeps the answer in the history.

Tips

- A **Changes** list at the bottom of each week lists who changed what.
- Locked weeks cannot be edited by the employee. A submitted week is locked for them until a manager acts.
- If a timer is forgotten, it closes at the person's last known action, never a guess, and is flagged for review. You choose how many hours that takes in Field work → Settings.

If something goes wrong

- **"This week is approved and locked."** Reopen it first.
- **Labor shows "unpriced".** The person has no cost rate. Set one in the Team tab.

Add employees and crews, and link their phones

Add people in the Team tab, set role, crew, availability, time off and cost rate, and manage signed-in phones.

The **Team** tab is where you build your list of people.

Where to find it

Field work → Team. You need the right to manage employees. A simpler list also exists at **Settings → Crew & hours**.

Steps: add an employee

1. Open **Field work → Team** and tap **+ Add employee**.
2. Fill in **Name**.
3. Add **Contact**: an email or mobile number for crew sheets and schedule texts.
4. Set **Crew** by typing a crew name such as "Crew A". People in the same crew name work together.
5. Pick a **Role**: Crew, Crew leader or Manager. Only the owner can make managers.
6. Enter **VisionScaper account (to use My work)**. This is their sign-in email. They sign up for a free VisionScaper account with it, then open My work.
7. Set **Availability**: tap the days they work, then **From** and **To** times.
8. Add **+ Add time off** with a first and last day and a note.
9. If you can see money, set **Internal cost per hour ($)**. It covers wage, taxes and insurance, is used for job costing and is never shown to the employee. Leave it blank to use the company rate from Settings → Costs.
10. Tap **Add employee**.

Edit, switch off, remove

- Tap a person to edit.
- Untick **Active** when someone leaves. History is kept.
- **Remove from the list** keeps anyone with time or jobs on record as a former employee.

Phones signed in

At the bottom, **Phones signed in** lists each phone with the person, platform and last-used time. Tap **Sign out** on a lost or shared phone. The app stops working on it at once. Switching an employee off also ends their access.

Tips

- The card shows your plan's counts of field employees and crews when your plan limits them. The numbers depend on your plan.
- The owner does not count as a field employee.

If something goes wrong

- **They cannot see jobs.** Check the account email matches exactly and the job is assigned to them.
- **Cost shows as "company rate".** That means the person's own rate is blank.

Clock in and out from My work (time tracking)

How crew start jobs, clock in for travel or shop time, take breaks, fix forgotten clock-outs and work offline.

My work is the crew's phone app. Everything in it is sent with the real time of the tap, so a late signal does not change the time recorded.

Before you start

- The employee needs a VisionScaper account linked in Field work → Team.
- A manager must assign the employee to the job.

Steps: a normal job

1. Open **My work → Today**. Jobs show in order, with the time, customer and address.
2. Tap 🧭 **Directions** (Google), or the Apple Maps or Waze buttons.
3. Tap 🚚 **Driving there** to clock in for travel. Or open the job and use the status buttons: 🚚 **En route**, 📍 **Arrived**, then ▶ **Start job**.
4. Use ⏸ **Pause job**, ▶ **Resume**, ⛔ **Block** (with a reason such as "Gate locked / no access") or 🔁 **Needs follow-up**.
5. Do the checklists, photos and materials (see their own articles).
6. Tap ✔ **Finish job**. If the owner requires approval, the job goes to a manager (**Sent to your manager for approval**).
7. Tap ■ **Clock out**.

Other time

At the bottom of Today, 🕒 **Clock in for travel, shop or other work** opens **Clock in for…** with the activities your company set. ☕ **Break** pauses pay; ↩ **Back to work** returns you to the last job.

Forgot to clock out?

A banner reads ⚠️ **Still clocked in since…**. Tap 🕔 **Set the time I finished**, pick the real time (it cannot be before you started) and save. Your manager sees it was set by hand. If nobody does this, the system closes the timer after the number of hours the owner set, at the last known action, and flags it for review.

My week

The **Hours worked** tab shows your week. Tap 📨 **Submit week** when ready. You can add missed time with a reason. Approved weeks are locked.

Offline

Without signal, taps are kept on the phone and sent when it returns. A pill shows how many changes wait. Jobs you already opened stay readable. Photos wait too.

Tips

- The owner decides which activities are paid and which count as job cost in Field work → Settings.
- If your company switched on location, a stamp shows where you clocked in and out (see the GPS article).

If something goes wrong

- **"No jobs assigned to you today."** Ask the office to assign you.
- **A change was not sent.** The pill stays until you are online. Tap it to retry.

Export approved hours for payroll

What the payroll export contains, who can run it, and why unapproved weeks are left out.

VisionScaper can produce a CSV of approved hours for your payroll provider. VisionScaper does not run payroll or pay anyone.

Before you start

- Hours must be approved. See "Review and approve hours worked".
- The permission **Export approved hours for payroll** is needed. It is off for managers by default. Turn it on under **Settings → Crew & hours → Team permissions**.
- Where the button lives: the export is provided to the phone app by the website. A button for it in the web Hub was not found in the code (not verified).

What the file has

Columns: **Employee**, **Week of**, **Job**, **Regular hours**, **Overtime hours**, **Total hours**. If you also have the right to see money, you get **Cost rate** and **Cost**.

- Only **paid** activities count. Unpaid ones such as breaks are left out.
- One row per person, week and job. Time with no job shows as "No job".
- Overtime is the hours past a weekly threshold, counted from the last hours worked. The default threshold in the code is 40 hours. The owner can set it between 1 and 80.
- The file name looks like `payroll-2026-03-02.csv`, with the number of weeks added when you ask for more than one.

Steps

1. Make sure every week you need is approved.
2. In the phone app, choose the payroll export, pick a date inside the first week, and choose 1 to 8 weeks.
3. Optionally pick one employee.
4. Save the file and open it in your spreadsheet or payroll tool.

Tips

- Check overtime rules against your state's rules yourself. VisionScaper does not give pay or legal advice.
- Each export is written to your activity log.

If something goes wrong

- **"No approved hours in that period."** Weeks still waiting for approval are counted in the message.
- **"…is not approved yet"** when you chose one employee. Approve those hours first.
- **You cannot find the export.** You may lack the permission; ask the owner.

Team location (GPS): live map, a person's day and privacy switches

See who is clocked in on a map, review a person's trail and mileage, and set the consent and retention options.

Location is shared from the phone only while a person is clocked in, and only if you switch it on. Positions are approximate and distances are estimates.

Where to find it

Field work → Location. The tab can be hidden until you switch it on in the "Show me" tool settings.

> Warning: Tracking employees is regulated in many places. The screen shows a legal warning from the website. Check your state's laws and have a lawyer read the notice wording. VisionScaper does not give legal advice.

Steps: turn it on

1. Open **Field work → Location**. The settings card is for people who can manage the team.
2. Switch on **Share location while clocked in**. It is off by default.
3. Leave **Ask people to accept a written notice** on unless you have checked your laws. Turning it off asks you to confirm.
4. Optional: **Show "Location is being shared" in the app**, **Also track breaks**, **Email managers a digest of location alerts**.
5. Adjust the numbers: **Ping every, when moving** (seconds), **Ping every, when still**, **Stop below battery** (%), **Job-site radius** (metres), **Alert after a stop of** (minutes), **Delete points after** (days).
6. Add an **Extra line for the notice** if you like. Changing it asks everyone to accept again.

Live team

The map lists people who are clocked in. Pins are colored: Live, Last seen, No location, On break. A position older than 15 minutes is drawn grey and labelled "last seen". It is never drawn as live. Choose a crew from the drop-down, or tap **Refresh**. It also refreshes every minute.

A person's day

Pick a person and a date. You see total miles with a note that it is an estimate, miles per job, arrive and leave times at job sites, stops longer than your limit, and a trail map with a playback slider.

Notice list and requests

- **Who accepted the notice** shows who accepted and when.
- **Requests** lets you **Download CSV** of a person's location points or **Delete** them. Deleting cannot be undone, and the change is logged.

Tips

- Time entries on the Hours worked tab show a small stamp: on site, a distance from the site, or "no location".

If something goes wrong

- **"Location sharing is switched off."** Turn on the first switch.
- **"Your role doesn't include team location."** Ask the owner for the live location or history right.

Route planner: plan one crew's day

Pull jobs from your calendar, set lunch and fuel options, and get the best order for the day.

The Route planner finds the shortest order for a crew's stops. You can add lunch, a fixed stop and fuel planning.

Where to find it

Hub left menu, group **Schedule & Field**, then **Route planner**.

Steps

1. In **1. The day**, pick the **Day**, the **Crew** (each crew's route is planned on its own) and **Leave at**.
2. Under **Start from**, type your yard or shop address. It is saved for next time. Tick **Come back here at the end of the day** or type another end address.
3. In **2. Stops**, tap 📅 **Pull from my calendar** to bring in that day's jobs with how long each takes. You can also add addresses by hand. Each stop has an address and **Minutes on site**. Jobs with no address are flagged: type it in or remove it.
4. Optional ⛽ **Vehicle & fuel**: choose your vehicle, which fills miles per gallon and tank size, or choose **Other — I'll type its MPG and tank size**. Tick **Pulling a trailer (about 25% fewer miles per gallon)** if it applies. Pick **Fuel in the tank**.
5. Optional 👷 **Crew**: enter **Crew size** and **Total hourly wage of the whole crew ($)**. Paid driving time then counts toward cost.
6. Optional 🍔 **Lunch**: time, length, or **No lunch break**. Tick **Be close to restaurants at lunch**.
7. Optional 📍 **A fixed stop**: tick **Be near … at …** to meet another crew or pick up a part. Give the address and **Be there by** time.
8. Tap 🗺️ **Plan my route**.

Results

You get the order, every leg with miles and minutes, and a note on how the order was chosen. The result can show: - ⛽ **Get fuel before this drive** with ⛽ **Best places to get fuel**: three stations ranked by total cost (fuel plus extra driving plus paid crew time), each with a plain reason. Prices come from Google when a Google key is set, and can be hours old. Without prices, the station with the least extra driving wins. - Buttons: 🧭 **Open in Google Maps**, 🖨️ **Print route sheet**, 📄 **Open as a page (save as PDF / share)**, 📅 **Update the calendar times**.

Tips

- Up to eight stops are checked in every possible order. Longer days use a fast improvement method that gives a good, not guaranteed best, order.
- Planning the day does not change your calendar unless you tap Update the calendar times.

If something goes wrong

- **"Add at least one stop with an address."** Fill an address on at least one stop.
- **"Couldn't find this address."** Check number, street and town.
- **No gas stations found.** Fill up before you leave, as the screen says.

Route planner distances: Google keys, OSRM and estimates

Where driving distances come from, which settings change them, and how to read "estimate" versus real figures.

The Route planner, the "Suggest times" feature and the phone app all need driving miles and minutes between points. VisionScaper gets them from one of three sources, in this order.

Source	When it is used	Label you see
Google Routes API	A Google key is saved	"Google driving distances"
OSRM server	No Google key, but an OSRM address is saved	"OSRM driving distances"
Estimate	Neither is set	Estimate from straight-line distance

Addresses are turned into map points with the US Census geocoder (cached). Restaurants and gas stations come from Google Places (with gas prices) when a key is set, otherwise from OpenStreetMap (no prices).

What an estimate means

Without a routing service the planner multiplies straight-line miles by 1.3 and guesses minutes, slower on short hops. Other screens show minutes as blank rather than inventing them. Real traffic is never modelled, even with Google or OSRM.

Steps: connect a source

These fields are on the WordPress admin page **Settings → VisionScaper**, in the **Basics** table, under the Google keys. 1. For Google: paste a key into **Google server key for the Route planner (optional)**. The page says to enable the Routes API and Places API (New), and to restrict the key to your server. Follow Google's current instructions to create the key. 2. Or, for OSRM: type the address of an OSRM server you host into **OSRM routing server (optional)**. It must start with `https://`, for example `https://osrm.example.com`. 3. Save the settings.

If the **Google Maps API key** field (for address autocomplete) is the only key present, the planner falls back to it as a server key. A browser key restricted to your site also needs the site as referer.

Tips

- OSRM is something you or your web person hosts. VisionScaper does not provide one.
- Routing answers are cached for a day when they are real.
- Check a plan on a few known trips before you rely on it. Nothing here has been tested by VisionScaper on your roads.

If something goes wrong

- **Everything says "estimate".** No key or server is saved, or the service did not answer.
- **The OSRM field clears on save.** It accepts only `https://` addresses.

Purchase orders: order, send, receive and close

Make a purchase order from a job's material list or by hand, email it to the vendor, receive deliveries and close it.

A purchase order (PO) lists what you are buying from a vendor. Receiving records what arrived. The result feeds each job's material cost.

Where to find it

Finance & Reports → Materials & purchases, or **Field work → Purchases** in the owner view. You need the right to create and approve POs, or to receive deliveries (receivers do not see prices).

Statuses

Draft, Sent, Partly received, Received, Billed, Closed, Voided.

Steps: make an order

1. Add a vendor first (see "Vendors"). Without one the screen says "Add a vendor first."
2. Tap **+ New purchase order**.
3. Pick the **Vendor**.
4. Under **For job (its material list is used)** pick a won job to copy its material lines. Or leave **No job (by hand)** and type each line: item, qty, unit and unit cost. Use **+ line** to add more.
5. Tap **Create draft**.

Steps: send it

1. Open the order and tap **Send to vendor**.
2. The vendor is emailed if the vendor has an email address. Otherwise the order is marked sent and the screen tells you nothing was emailed.

Steps: receive a delivery

1. Open the order and tap **Receive a delivery**.
2. Enter the quantity that arrived on each line. Receiving more than ordered needs a reason in the **Why extra?** box. A short line needs **Why short?**.
3. Tick **That is everything (short lines need a reason)** if the order is complete.
4. Tap **Save delivery**. The phone app can also attach a photo of the delivery ticket.

Close or void

- **Close** finishes an order.
- **Void purchase order** asks why. Voiding is logged.

Tips

- The Deliveries list shows who received what and when.
- Use the status filter (default **Open**) to find old orders.
- Draft orders can also come from low stock in Inventory.

If something goes wrong

- **Vendor not emailed.** The vendor has no email. Add one in Vendors.
- **Cannot receive extra.** Type a reason in "Why extra?".

Vendors: your supplier list and terms

Add and archive vendors with contact details, payment terms and your account number.

A vendor is a supplier you buy from. The list feeds purchase orders, supplier bills and inventory.

Where to find it

At the bottom of **Materials & purchases**, in a card called **Vendors**. You need the right to create and approve purchase orders.

Steps: add a vendor

1. Open **Materials & purchases** and find the **Vendors** card.
2. Tap **+ New vendor**.
3. Fill in: - **Name** - **Contact person** - **Email (orders go here)** - **Phone** - **Terms**, for example a Net 30 choice - **Our account number with them** - **Notes**
4. Tap **Save**.

Edit or archive

Tap a vendor to edit. An edit warns you if someone else changed the vendor first. The archive action says "Vendor archived. Its purchase orders stay." and gives you an undo.

Why terms matter

In Supplier bills, the due date of a bill is worked out from the vendor's terms when you leave it blank. The code reads text like "Net 15" as 15 days, "due on receipt" or "COD" as 0 days, and anything else as 30 days.

Tips

- Put the email where orders should go. That email gets the purchase order.
- You can add a new supplier by name right inside the Supplier bills form.
- If no vendors exist the card shows an empty-state prompt.

If something goes wrong

- **"Someone changed this."** Close the window and open the vendor again.
- **A vendor disappeared.** It was archived. Its history stays on old orders.

Supplier bills: enter, approve and record payments

Track what suppliers bill you, approve bills, record payments, and see how approved bills count in job cost.

Enter each bill a supplier sends you. Approved bills count toward the job's cost. VisionScaper only records payments you already made. It never sends money.

Where to find it

Finance & Reports → Supplier bills. This is a plan feature (which plans is not verified here). The owner and managers can enter, approve and pay.

Steps: enter a bill

1. Open **Supplier bills** and tap **Enter a bill**.
2. Choose a **Supplier**, or **+ A new supplier**.
3. Type **Bill number** exactly as printed. The same supplier and number cannot be entered twice, unless the first was voided.
4. Set **Bill date** and **Due date**. Blank due date comes from the vendor's terms.
5. Optional: choose a **Purchase order** and a **Job**.
6. Add **Lines**: description with quantity and price each, or just an amount. Add **Tax on the bill**.
7. Tap **Save as draft**, or **Save and approve**.

Approve and pay

1. Open a draft and tap **Approve**.
2. When approved, **Record a payment**: amount, how, date and a reference such as a check number.
3. The bill goes Draft, Approved, Part paid, Paid. **Void bill** needs a reason, and a payment can be voided with a reason too.

The list

Tiles show **Left to pay**, **Past due** and the next days of **Due in N days**. Filters: To pay, Past due, Due soon, Drafts, Paid, All. Search by supplier, number or note.

How bills count in job cost

- A bill tied to a purchase order replaces the order's "received" value. It is never added on top.
- A bill tied only to a job is a direct cost of that job.
- Only approved, part-paid and paid bills count, at approval time.
- Drafts and voided bills never count.

Tips

- An approved bill cannot be edited. Void it (while nothing is paid) and enter it again.
- The owner can turn on "different people enter and approve". It only applies while another approver exists, so a small shop is never locked out.

If something goes wrong

- **Approve is greyed out.** A different person must approve this bill (your setting).
- **Duplicate error.** That supplier and number already exist.

Inventory: items, places, counts and moves

Track stock in the shop and trucks, count and move items, and set stock aside for a job.

Inventory tracks mulch, stone, plants, fittings and tools: how many you have, where, and when to reorder. Every change is a new line in a history that is never edited.

Where to find it

Hub left menu, group **Schedule & Field**, then **Inventory**. It is a plan feature (which plans is not verified). You need the right to manage or receive purchases to see it.

Steps: set up

1. Open the **Places** tab and tap **Add a place**. Give it a name and a kind: Shop or yard, Truck or trailer, or Other. Add at least one before counting anything.
2. Go to **Stock** and tap **Add item**. Fill in **Name**, **Code (optional)**, **Unit**, **What it costs you per unit ($)**, **Supplier**, **Reorder when available is at or below**, **Order this many** and **Usually kept at**.
3. In **How many do you have now?** type your starting amount. It is saved as a count.

Don't want to type names? Use **Or start from names you already use on jobs and orders** and tick items.

Steps: day to day

On an item you have: - **Count / change**: choose **I counted — this is how many there are**, or **Add or remove this many**. Pick a reason and add a note (needed for "Other"). - **Move**: from one place to another. Needs two places. - **Set aside**: hold some for a job or quote. It stays in the truck but no longer counts as free. - **Edit** and **History**.

Tabs

Stock, **Low**, **Set aside**, **Not enough recorded** and **Places**. The Stock tab shows on-hand, available, on order and stock value at your cost, with filters All, Low, On order and OK.

Tips

- Material used on a job is taken from the job's own material record, so cost is not counted twice.
- On the Places tab the owner can allow stock to go below zero. When off, a count that would go negative is refused.
- If a job used more than you recorded, the job is not blocked. The gap is listed under **Not enough recorded**.

If something goes wrong

- **"Add a place first."** The Places tab needs at least one place.
- **"You need two places to move stock."** Add another place.

Inventory: low stock, reorder drafts and spreadsheet import

Make draft purchase orders from low stock, release set-aside stock, and import or export your list as a CSV.

Low stock and reorders

An item appears on the **Low** tab when what is available is at or below its reorder level and it is not already on an open order. Set the level when you add or edit an item. "0 = never warn."

Steps

1. Open **Inventory → Low**.
2. Tap **Reorder this** on one item, or **Make draft orders for everything low**.
3. The result gives one draft order per supplier and a list of **Left out** items with the reason. An item with no supplier shows "No supplier yet. Edit the item to set one."
4. Tap **Open Materials to check and send**. Nothing is sent to anyone by this step.

Set-aside stock

On the **Set aside** tab each hold shows quantity, the visit or quote it is for and how much was used. Tap **Release** to put it back as free stock.

Import and export

Tap **Import / export**.

Export. Tap **Download my stock list** to get a CSV.

Import. Choose a CSV (600 KB at most) or paste rows. The first line must be column names. The screen lists: `name, sku, unit, cost, supplier, reorder_point, reorder_qty, location, qty`.

1. Tap **Check the file**. It shows how many are new, how many will update, and any lines with a problem.
2. If any line has a problem, nothing is imported. Fix and check again.
3. Tap **Import**.

"qty" is what is counted at "location", so importing the same file twice changes nothing.

Tips

- Export first to get the right column layout, edit it, then import.
- Ignored columns are named in the check result.

If something goes wrong

- **"That file is too big."** Split it under 600 KB.
- **"Choose a file or paste the rows first."** The box is empty.
- **Import button is greyed.** It turns on only after a clean check.

Plan vs actual and profit alerts

Compare a job's budget to what has been spent by section, and get alerts when cost or margin crosses your lines.

Plan vs actual shows a job's quote-based budget against the cost recorded so far, section by section. It also lists jobs that crossed an alert line.

Where to find it

Finance & Reports → Plan vs actual, or **Field work → Plan vs actual**. You need the right to see money.

What the numbers mean

"Budget is the quote's own cost. 'Actual' is cost recorded so far; labor and other costs are not split by section, only purchased materials are." That is the screen's own wording.

Steps

1. Open **Plan vs actual**. At the top is **Profit alerts**. Each row says **Over budget level** or **Margin under target**. Tap a row to open that job.
2. Or pick a job in **Choose a job…**.
3. Read the headline: "$ actual of $ planned" and the percent used, with a bar. The bar turns red at or past the alert level.
4. Read the table: **Section**, **Budget**, **Actual**, **Used**. It includes a row for **Job changes & extra work** and a row **Other (labor and anything not in a section)**.
5. To tune alerts for this job, set **Alert at % of budget** and **Margin floor %**, then tap **Save for this job**.

Company alert setting

If you can manage the team, tick **Email managers one digest when a job crosses its line**. The company default lines are shown below it.

Tips

- Sections, job changes and "other" add up to the total.
- The alert source is shown in brackets after the level, telling you whether the number is the company default or this job's own.
- Use **Job profit** for the full labor, material and revenue view.

If something goes wrong

- **Section actuals look low.** Only purchased materials are assigned to sections. Labor shows in "Other".
- **No jobs in the picker.** Only signed quotes appear.

Expenses: add, receipts and approvals

How crew and managers log expenses with receipts, and how the owner approves or rejects them.

Employees add expenses from the phone app. Each waits for approval. People who can approve have their own approved at once.

Where to find it

Approvals: **Finance & Reports → Expenses**, or **Field work → Expenses**. You need the right to approve expenses.

Adding an expense (phone app)

An expense has an amount, a category, and optionally a vendor, a note, the date spent, a job and a receipt photo. Categories are:

Materials, Fuel, Equipment & repairs, Dump / disposal, Subcontractor, Supplies, Meals, Other.

The phone app can add an expense offline. A retry is saved only once. Editing an existing expense needs a connection. An employee can edit or delete their own pending or rejected expense.

Steps: approve

1. Open **Expenses**. The title shows **Expenses waiting for your OK** with a count and total.
2. Each card shows amount, category, who entered it, the date, vendor, job, customer and note, with **View receipt** if one is attached.
3. Tap ✅ **Approve** or ✖ **Reject**.
4. If you reject, you must say why (at least a few characters). The person sees it.
5. The person is notified of the decision.

If everything is handled, the screen says "Nothing is waiting for your OK."

Tips

- Only 50 show at a time. Approve some to see the rest.
- A person who can approve is notified when someone else adds an expense to approve.
- If you use the QuickBooks connection, a setting can send approved expenses (only those approved after you turn it on).

If something goes wrong

- **"Say why it is rejected."** Type a longer reason.
- **A card is missing.** Someone else may have already approved it.
- **No receipt.** The card says "No receipt attached." Ask the person to add one.

Job profit: estimated vs actual by job and project

See revenue, direct cost, gross profit and margin per job, with filters and a final-or-provisional label.

Job profit compares estimates with what was recorded. Money is shown only to people with the right to see money.

Where to find it

Finance & Reports → Job profit, or **Field work → Job profit**.

Steps

1. Open **Job profit**. The date range starts as the last 30 days.
2. Filter by **From**, **To**, **Customer**, **Employee**, **Crew**, **Service** and **Status**.
3. Read the tiles: **Revenue invoiced**, **Actual direct cost**, **Gross profit**, **Labor hours**, **Materials (recorded)**, **Over labor budget**, **Missing cost info**, **Final (all costs approved)**.
4. Tap **Over labor budget**, **Missing cost info** or **Final** to list those jobs.
5. Tap any job row to open it. Columns are Job, Status, Hours (actual / est), Direct cost, Revenue, Gross profit and Numbers.
6. A second table lists **Projects (signed quotes)** in the range.

What "Final" and "Provisional" mean

- **Final**: every cost on the job is approved.
- **Provisional**: some time is unapproved or revenue is not invoiced yet.
- **No data**: not enough to work out. Small notes name what is missing: No estimate, Time not approved yet, Labor without a cost rate, Material costs pending, No price or invoice, Timer running.

How it is counted

Labor is recorded time times each person's cost rate. Materials are those used on the job or bought for it (a setting in Field work → Settings), counting only lines with a known cost. Revenue is invoices, or the agreed price when none exists. Overhead is a separate line, shown only if you turned it on. Bills tied to the job count once, as described in "Supplier bills".

On a single job

Open the job in Field work and expand **$ Job costing** for estimated, actual and variance by labor hours, labor cost, materials and direct cost, plus "Gross profit so far".

Tips

- Set each person's cost rate in the Team tab so labor is priced.
- Approve hours so numbers become final.

If something goes wrong

- **"Not enough data yet."** Record time or materials and check the date range.
- **Labor without a cost rate.** Set rates in Field work → Team.

Overhead budget: work out your overhead per labor hour

Enter a year's overhead, billable hours and target profit, then choose whether to use the results on new quotes.

The **Overhead budget (a year)** card turns your yearly overhead into a rate per labor hour, and suggests a markup. Nothing changes until you tap "use this".

Where to find it

At the bottom of **Plan vs actual**. It shows for people who can manage the team or edit service templates. A "Show me" setting can hide it until you switch the tool on.

Steps

1. Open **Plan vs actual** and scroll to **Overhead budget (a year)**.
2. Fill in: - **Year** - **Overhead $ for the year** - **Billable labor hours** - **Target profit $**
3. Tap **Work it out**.
4. Read the result: **Overhead per labor hour**, **profit per hour**, **Overhead as a % on direct cost** (with the percent you use now), and **Suggested markup**.
5. To use the percentage on new quotes, tap **Use this**. A prompt reminds you it changes new quotes only. Quotes and invoices already made keep their numbers.
6. To use the suggested markup on templates, tap **Use for service templates…**, tick the templates, and apply. Each ticked template is saved as a new version.

Formula in plain words

Overhead dollars divided by billable hours gives overhead per labor hour. The percent on direct cost needs a labor rate to be set.

Tips

- Use real totals from last year.
- Billable hours are hours you charge for, not total hours paid.
- Revisit once a year.

If something goes wrong

- **"Needs a labor rate."** Set **Labor cost per hour ($)** in Settings → Costs.
- **No templates listed.** You have not created service templates yet.

Equipment and maintenance reminders

Add mowers, trucks and trailers, log hours or miles, record services and get reminded before maintenance is due.

Add each machine and vehicle. VisionScaper fills in its usual maintenance, then tells you when something is due.

Where to find it

Hub left menu, group **Schedule & Field**, then **Equipment**. It can be switched off with the "Show me" tool settings.

Steps: add a machine

1. Tap **Add equipment**.
2. Pick the **Type**. The usual tasks are filled in (oil, blades, grease, filters, belts, tires, registration and so on).
3. Type a **Name**, such as "Mower #2".
4. Add **Make**, **Model**, **Year**, **Serial / VIN**, **Plate** and **Bought** if you want.
5. Choose the **Meter**: **Engine hours**, **Miles**, or **No meter (by date only)**. Enter the **Current reading**.
6. Under **Maintenance**, adjust each task. A task is due "Every" N hours or miles and/or N days, whichever comes first. Set "last done" so the first reminder is right. **+ Add a task** adds your own.
7. Add your own fields, for example "Fleet #" or "Warranty ends".
8. Tap **Add equipment**.

Daily use

- Type a **New reading** and tap **Update** to record hours or miles. A reading lower than the last one asks you to confirm.
- Tap ✅ **Done** on a task, or **Log a service (several tasks)**, then set date, meter, cost, who did it and a note. The next due point is scheduled.
- The filter chips are **All**, **Due now** and **Due soon**. A card shows 🔴 Due, 🟡 Soon or 🟢 OK.
- **All maintenance & history** shows the last 20 services.

Reminder settings

Open ⏰ **Reminder settings**. - **Remind me about maintenance** (one message a day at most, in working hours). - **Send by**: Email, Text, or Both. Text is off unless messaging is set up. - **Warn me when this close (%)**, for example 10% shows "soon" at 90 hours of a 100-hour interval. - **Ask for new readings after (days)**, checked on Mondays. 0 means never ask.

Tips

- Deleting a machine gives an undo.
- Put the cost of a service in the Done box so you have a record.

If something goes wrong

- **The Add button is blocked.** Choose a Type first.
- **Reading rejected.** Confirm if the lower number is right.

Tasks: one to-do list for you and your team

Add, assign and finish tasks tied to a customer or job, and watch what is due today or past due.

Tasks shows everything to do in one list. Tasks added with the "+" quick-add button, or from the phone app, show here too.

Where to find it

Hub left menu, group **Schedule & Field**, then **Tasks**. No plan restriction is set for it in the code.

Lists

Tabs: **Mine**, **Team**, **Due today**, **Past due**, **Done**. The **Team** tab shows only to people who can see and assign everyone's tasks. Counts show in brackets, and Past due is highlighted.

Steps: add a task

1. Tap **Add task**.
2. Type **What needs doing** (at least two letters).
3. Set **Due date** and optional **Time (optional)**. A time needs a date.
4. Choose **Priority**: Normal or High.
5. If you may hand out tasks, pick **Who is it for**. Otherwise the task is yours.
6. Optional **Customer**: type two letters to search, then pick one.
7. Optional **Job**: pick an upcoming visit.
8. Add **Notes**, then tap **Add task**.

Finish, edit, delete

- Tap the round tick to mark done. Tap again to put it back.
- **Edit** opens the same form. If someone changed it first, you are asked to reopen it.
- **Delete** asks for confirmation.
- Links on a task open the customer or the job.

Tips

- Filter by **Search tasks** or by person (managers).
- Opening Tasks from a customer or job narrows the list to that one. Tap the chip to clear it.
- Past due tasks show "Past due:" in red text.

If something goes wrong

- **"Give the task a short title."** Use at least two letters.
- **"Pick a due date to go with the time."** Add the date.

Training: build, publish and assign courses

Create courses with steps and quizzes, publish numbered versions, assign them to people and handle work to check.

Training is the owner's and managers' side of employee learning. Employees take courses in **My work**.

Where to find it

Hub left menu, group **Team & Training**, then **Training**. You need the right to create, publish and assign training, or to review practical work.

Tabs

Overview, **Courses**, **Assigned**, **To check**, **Talks**, **Library**, **New hires**, **People**, **Reports**, **Settings**.

Steps: make a course

1. Open **Courses**. Start from a template under **Starter templates** (**Use as a draft**) or make a **New course**.
2. Add a title, description, category, difficulty and time it takes.
3. Add sections and steps. Step kinds are Reading, Video, Audio, Picture, PDF, Other file, Link, Checklist, Quiz, Survey, Practical task and Acknowledgment.
4. Quiz question kinds are One right answer, Several right answers, True or false, Put in order, Match pairs, and a Written answer that a person grades. Each can show an explanation afterwards. You set the **Pass mark (%)**, tries and waiting time.
5. For a video, upload the file here. A video on another website cannot be tracked. You set the share that must be watched (%). Captions (.vtt) can be attached.
6. Optional: **Give a certificate when finished**, a title, **Certificate expires after (days)** and **A manager approves each certificate first**.
7. Tap **Save draft**, then **Publish this course**.

Publishing makes a numbered version that never changes. People who started a version keep it. Use **Publish a new version** later, and optionally ask earlier finishers to take it again.

Steps: assign

1. Open the published course and tap **Assign**.
2. Pick at least one person, and optional start and due dates.
3. People who already have the course are skipped.

Work to check

To check lists quiz answers and practical tasks waiting for you. Give marks, add a note, then **Save grades**, **Approve**, or **Send back to redo**. You can allow one more attempt.

Other tabs

Talks (toolbox talks and tailgate meetings with attendance), Library (procedures and files), New hires (checklists), People (skills and roles), and Settings (automatic assignment, pause all reminders).

Tips

- Course **Archive** hides it but keeps every record.
- A translation can be linked so employees who pick a language are offered it.

If something goes wrong

- **"Give the course a title first."** Add a title.
- **Not saved.** The builder shows the reason and offers Save again.

Training reports, certificates and automatic assignment

Download training reports as CSV, approve or revoke certificates, and set rules that hand out training for you.

Reports

Open **Training → Reports**.

1. Pick a report: **Every assignment**, **By person**, **By course**, **Talk attendance**, **Certificates**, **Questions people miss**, **Safety training hours**, or **Read confirmations**.
2. The table shows up to 200 rows. A note appears if there are more.
3. Tap **Download as a spreadsheet (CSV)**. The file has all rows.

Overview and the To check list

Overview shows how everyone is doing: who is Not started, In progress, Completed, Failed, Due soon or Expired; courses people are not finishing; questions people miss most; how people rate the courses; toolbox talks in the last 30 days; and certificates waiting for approval or expiring in the next 60 days.

Certificates

1. When a course issues a certificate that needs approval, it appears under **Certificates waiting for approval**.
2. Tap **Approve**.
3. To **Revoke**, say why. The record stays, and the public check page says the code is no longer valid.

Employees see a certificate with a link that anyone can use to check it.

Settings: rules and pause

- **Hand out training automatically**: rules for **When someone is hired** and **When someone's role changes**, limited to chosen roles, with days to finish and remind days before.
- **Assign the course again automatically before a certificate expires**, with days to renew.
- **Tell managers about late training**.
- **Let people join a points leaderboard** and **Badges for finished courses** are options.
- **Pause all training reminders** is the emergency stop. While paused, nothing is sent. **Send due reminders now** sends them.

Tips

- A read confirmation is a record that the person tapped "I have read this". It is not a legal signature, as the screen says.
- Use the Safety training hours report when someone asks for proof of crew training.

If something goes wrong

- **"Nothing to show for this report yet."** No data fits that report.
- **Reminders did not go.** Check whether they are paused.

Phone app dispatch: assign, move jobs and keep a route order

What dispatchers can do from the phone app: calendar feed, conflict checks with override, repeating-series edits and saved route order.

The website offers the phone app a set of "dispatch" calls. This article explains what they do, from the code. The exact button names inside the phone app are not in this code, so they are not given here.

Who can use it

Anyone whose role has the rights. Seeing all jobs needs "See every job". A person without it sees only their own jobs.

What it does

Calendar feed. The phone gets a day, week or month feed with each job's assignees, people's availability and time off.

Assign or reschedule one job. The app first checks for conflicts. Conflict kinds are: - overlap with another job, - time off, - day off, - outside the person's hours, - inactive person (this one blocks and cannot be overridden).

If the first four kinds exist, nothing is applied until the dispatcher sends again with an override and a short reason. The reason is required and logged on the job timeline. If someone else changed the job meanwhile, the change is refused and the app should reload.

Repeating visits. For a repeating series the dispatcher chooses **this one**, **this and following**, or **the whole series**. The server reports what would change, checks conflicts across all of it, and never touches finished jobs.

Route order for a day. For one person and day the app can see stops in the saved order, ask for a suggested order, and save the chosen order. Drive times are shown only when a routing service (Google or OSRM) gave them. Otherwise the app gets an estimate flag instead of invented minutes. Saved minutes are stored only when the suggestion's signature matches.

Customer notice. A "notify" option tells the customer. Employees are told when their schedule changes, unless you turned that off in Field work → Settings.

Same rules as the website

Moves and assignments use the same save path as the website, so customer notices, reminders and the job timeline behave the same everywhere.

Tips

- Use the web **Assign crew** tab for planning, and the phone for quick fixes on site.
- Pair this with the Route planner for the best order.
- Every override is recorded, so you can see who scheduled over a conflict.

If something goes wrong

- **"Add a short reason to schedule over these conflicts."** Type a reason and send again.
- **Message says the job "moved or been reassigned".** Reload and try again.

Employee goals and written reviews

Set goals for people on your team and write reviews that the employee reads, confirms and you sign off.

Goals and reviews lets managers set goals and write reviews. The screen says these are working notes for your company, not legal or HR advice.

Where to find it

Hub left menu, group **Team & Training**, then **Goals and reviews**. It is a plan feature (which plans is not verified). The right "Set goals and write reviews for the people on their team" is on for managers by default, and leaders and crew see only their own unless the owner says otherwise.

Goals

1. Open the **Goals** tab and tap **Add a goal**.
2. Choose the person.
3. Fill in the goal, **How it is measured** ("How will you know it is done?") and a due date.
4. Set status and **Percent done**. Statuses: Not started, On track, At risk, Done, Dropped.
5. Tap **Save goal**. Add a **Progress note** whenever there is news.

Employees see their own goals and can add progress notes.

Reviews

1. Open the **Reviews** tab and tap **Write a review**.
2. Choose the person and a **Period or name**, for example "Spring 2026".
3. Give a score from 1 to 5 on the six fixed items, then fill in **Strengths** and **Next steps**.
4. Tap **Save draft**. "Draft saved. Nobody else can see it yet."
5. When ready, tap **Share with** the person. This warns that they will see it and it can no longer be edited.
6. The employee opens it and confirms **I have read this review**, with an optional comment. The screen explains that confirming means they read it, not that they agree.
7. You tap **Sign off and lock**. Signing locks it forever. If the employee has not confirmed, you must write why you are signing anyway.

The statuses are Draft, Waiting for the employee, Waiting for sign-off and Signed off.

Fixing a signed review

You cannot edit it. Tap **Write a corrected review**. The new one points back to the signed one, which stays on file unchanged.

Tips

- A drafts-only list is visible only to its writer.
- Use **Download list** to save the list of reviews.
- You can print a review from its page (allow pop-ups).

If something goes wrong

- **"Choose who the review is for."** Pick a person first.
- **No Share button.** You may not have the right, or it is already shared.

Company library: how-tos and policies your team must agree to

Publish how-tos and policies, ask chosen people to read and agree by a date, and see who is behind.

The library keeps your how-tos and policies in one place. A document can require some or all of your people to read it and agree.

Where to find it

Hub left menu, group **Team & Training**, then **Company library**. No plan restriction is set for it in the code.

Steps: publish a document

1. Tap **New document**. If the library is empty it says "Write your first document: a safety rule, a how-to, or a policy."
2. Enter a title and a category, for example Safety.
3. Write the text.
4. Under **Who must read and agree**, choose **Everyone on the team**, **Some roles** (Crew, Crew leaders, Managers) or **Named people**. Or choose no agreement ("Nobody has to agree to this one").
5. Set **Days to do it**.
6. Add a **Note for the first version (optional)**.
7. Tap **Save as draft**, or publish.

Changing a document

Tap **Edit and publish a new version**. Write **What changed?** (people see it). Everyone who agreed to the old version is asked to agree again. **Version history** is kept.

Seeing who agreed

- **Who has agreed (version N)** lists people and dates.
- **Policies not yet read** shows who is late and how many **Days late**.
- Use **Send reminders now**. A reminder also goes out each week to people who have not agreed by the date. If training reminders are paused, the screen says so.
- Tap **Download list** to save the list.

What employees see

Employees see **Waiting for me to agree** and **Please read this, then confirm.** Their button is **I have read this and I agree**. The record stores which version and when.

> Note: "I agree" here is a record that the person read it. It is not a legal signature.

Tips

- Use the search box and **Policies only** filter to find a policy fast.
- Put each rule in its own short document so a change does not re-ask people about everything.

If something goes wrong

- **Nobody is asked.** Check the "Who must agree" choice.
- **Reminders are not going.** They are paused in Training settings.

Checklists and field forms for your crew

Build checklists with tasks, questions, numbers and required photos, attach them to jobs, and see how crews complete them.

A checklist is a set of tasks, questions, measurements and required photos your crew completes on the phone. Required items must be done before a job can be finished.

Where to find it

Field work → Checklists. You need the right to create checklists, or to see every job.

Steps: build one

1. Tap **+ New checklist**.
2. Type a **Name**, for example "Mowing closeout".
3. Tap **+ Add item** for each item and type what to do or ask.
4. Choose a **Type** for each item. The types come from the website. Types seen in the crew app are task (a tick box), yes or no, choice, number, text and photo.
5. Set the options per item: - **Required**. - Photo: No photo, Photo optional or Photo required. - Note: No note, Note optional or Note required. - For number items, a **Unit** such as ft or bags. - For choice items, **Choices, separated by commas**.
6. Use the arrows to reorder, and the remove button to delete an item.
7. To show an item only sometimes, use "Only if … is": pick an earlier yes/no or choice item and its answer. Default is **Always show**.
8. Under **Use it on**, tick **Every job**, or pick kinds of visits and service templates.
9. Tap **Save checklist**.

The list shows item count, required count, where it applies and the version, such as "v2".

Versions

Saving makes a new version for jobs that have not started it. Jobs already in progress or finished keep the version they had. **Archived** shows retired ones. Archiving says "Jobs keep it."

What the crew does

On a job card, ☑ **Checklists** shows progress such as "2/5 required". Each item has its input, a camera button, and a note. If something cannot be done, the crew can mark it with a reason, and a manager sees it.

If a required item is missing

Tapping ✔ **Finish job** shows **Not finished yet** with **These are still required:**. Managers with the override right can type a reason and tap **Finish anyway**. The reason is saved on the job.

Tips

- A service template can also carry its own simple **Service checklist** of ticks.
- Unfinished checklists appear on the Today tab.

If something goes wrong

- **Crew do not see it.** Attach it to the right visit kind or service.
- **Edits not showing on a started job.** The job keeps its old version.

Photos and documents on jobs: take, share and mark up

Add before, progress and after photos, share chosen ones with the customer, mark them up and require them to finish.

Photos protect you if a question comes up later. Add them from the phone on each job.

Where to find it

Open a job in **My work** (or from Field work) and expand 📷 **Photos & documents**.

Steps: add photos

1. Choose a **Type** chip: Before, Progress, After, Damage, Material delivery, Document or Other. The default starts as Before for a scheduled job, After for a finished one, and Progress otherwise.
2. Tap 📷 **Take photo**, or 🖼️ **Choose photos / PDF**.
3. A progress bar shows. Large photos are shrunk on the phone to save data (JPEG, up to 2048 pixels on the long side).

A file over 15 MB is refused. Without signal, the photo is saved on the phone and uploads later.

Share with the customer

Each photo has a tick box, **Customer can see**. Only people with the right to share job photos see it. The timeline records "Shared with the customer" or "Unshared".

Mark up a photo

1. Tap **Mark up** on a photo (not available for HEIC files or cancelled jobs).
2. Choose ↗ **Arrow**, ◯ **Circle** or **T Note**, and a color. Use **Undo** to remove the last mark.
3. Tap **Save as a new photo**. The original is never changed.

Remove

A permitted person can remove a file after a confirmation, "Remove this file from the job?".

Require photos to finish

In **Field work → Settings → Jobs**, tick: - **A "before" photo is required to finish a job** - **An "after" photo is required to finish a job** Checklist items can also require a photo.

Finished photos on the quote

On the quote's Job card, **Finished photos** with **Add photo** feeds an optional public showcase.

Tips

- Take the before photo at arrival, before touching anything.
- Add a caption to explain what the photo shows.

If something goes wrong

- **"Over 15 MB."** Take it again at lower quality or use a PDF.
- **Upload stuck.** Tap the "to send" pill when you are online.

Private notes on each employee

Keep owner-only notes, ratings and pay details on each crew member in Settings, never shown to the employee.

Each crew member in your settings has a locked 🔒 **Private notes** section for you alone.

Where to find it

Settings → Crew & hours, in the crew list. Open the 🔒 **Private notes** drop-down under a person. A ✎ shows next to it when there is something saved.

Steps

1. Open **Settings → Crew & hours** and find the person.
2. Open 🔒 **Private notes**.
3. Fill in any of: - **Role**, for example Foreman - **Started** (date) - **Pay rate**, for example $24/hr, typed as text - Ratings from 1 to 5 for **Reliability**, **Quality of work** and **Safety**: 5 is Excellent, 4 Good, 3 OK, 2 Needs work, 1 Poor - **Notes**, for example "3/14 – trained on paver base"
4. Tap **Save crew** at the bottom of the list.

Privacy

The screen says: only you see this. It is never shown to the employee or shared with other contractors. The code removes the private block from the crew data it gives to schedule screens. References are only given with the employee's consent.

Tips

- Keep it factual: dates and what happened. It helps with reviews, raises and references.
- These notes are separate from **Goals and reviews**, which the employee sees when you share them.
- The Pay rate here is a note only. Job costing uses the **Internal cost per hour ($)** in Field work → Team.

If something goes wrong

- **Notes are gone after leaving.** You must tap **Save crew**.
- **A manager cannot see them.** The notes live in Settings, which is the owner's area.

Taking training in My work (for employees)

What an employee sees in My work Training: assigned courses, quizzes, practical work, certificates, talks and procedures.

Employees do their training in **My work**, the crew's phone app, with their own sign-in. You can share these steps with your crew.

Before you start

Your manager must assign you a course. When they do, it shows under **My training**. Until then you see "Nothing has been assigned to you yet."

Steps: finish a course

1. Open **My work** and tap the **Training** tab.
2. Under **My training**, tap a course. Overdue ones are first.
3. Work through **Steps in this course**. A step can be read, watched, ticked as a checklist, or answered as a quiz. Some are practical.
4. Videos must be played in the app for the website to count the time. If a step says it points to a video on another website, ask your manager to upload it.
5. Quiz: tap **Start the quiz** and **Send my answers**. You may get a result at once, or "Your answers are with your trainer."
6. Practical work: describe what you did under **What did you do?** and add a picture or PDF. A picture can be required. Tap **Hand in my work**. Your trainer looks at it.
7. Acknowledgment steps: tap **I have read this** or **Acknowledge**. It records that you read it, with the date. It is not a legal signature.
8. Tap **Finish course**. The course is finished when every required step is done. You see "Course finished. Well done!"

Certificates

If the course gives one, you can open **Certificate**. There is a link that anyone can use to check it. If it needs approval, a manager approves first. Some certificates show "Needs renewing" when due.

Other parts

- **Toolbox talk**: tap **Sign me in** to be counted at today's talk or tailgate meeting.
- **Procedures**: search and read, and acknowledge new versions.
- **My record**: your training record, and you can download your data.
- **Leaderboard**: shows only if your company turned it on and you joined.
- **I would like my training in**: choose a language. If a course is not translated, you see the original with a note.
- Ratings: after a course you can give stars and a comment.

Tips

- Use a good signal for videos, then your phone can sync progress.
- If a quiz says "You have no tries left. Ask your manager.", your manager can allow one more attempt.

If something goes wrong

- **"This course has no steps yet."** Tell your manager.
- **A step is missing its video.** Say so. The screen asks you to tell your manager.

Invoices & payments

Invoices, Stripe, QuickBooks, Xero and reports.

Invoices at a glance

What an invoice is in VisionScaper, where to find the list, and what each status badge means.

Invoices are the bills your customers pay. You make and manage them in the Contractor Hub. Customers open each one on a web page and can pay it online if you have connected Stripe.

Where to find them

1. Open the Contractor Hub.
2. In the menu group named **Finance & Reports**, choose **Invoices**.
3. You see one row per invoice. Each row shows the number and title, the customer, the type, the due date, the status badge and the amount.
4. Tap a row to open that invoice in the editor.

The Invoices screen has two buttons at the top: **New invoice** and **Unpaid invoices** (the list of who still owes you money).

> Note: A deposit invoice can be made for you when a customer signs a quote. See "Deposits and payment schedules".

What the statuses mean

Badge	What it means
Draft	Saved but not sent. The customer cannot pay it yet.
Sent	The customer has the link. It is open and can be paid.
Viewed	A badge exists for it, but this manual cannot confirm when it is set (not verified in code).
Bank payment clearing	The customer started a bank (ACH) payment. It is not paid until the bank clears it.
Part paid	A payment was recorded, but a balance is left.
Paid	Paid in full. A "PAID" stamp can show on the invoice (you can turn the stamp off in Invoice design).
Voided	Cancelled. It stays in the activity log with the reason you gave.

An invoice that is past its due date also gets an overdue marker, and the Unpaid invoices screen shows how many days late it is.

What the types are

When you create an invoice you pick a **Type**: Deposit, Progress, Final, Recurring / maintenance, or Other. The type is a label for you. It also decides how the list describes the invoice (progress shows as "partial").

Tips

- Use **Draft** while you are still adding lines. Nothing goes to the customer until you choose **Save & send**.
- Search is built into the Hub. Typing an invoice number in the search box opens that invoice.
- Open an invoice any time to see its live preview, which is exactly what the customer will see.

If something goes wrong

- **The Invoices item is missing from the menu.** Your layout or your team role may hide it. Owners can change what shows in Settings. A team member needs the right to see company money (not verified in code for every role).
- **You do not see a Viewed badge on your invoices.** Do not count on it for tracking.

Create an invoice

Step by step: start a new invoice, pick the customer and type, add lines, and save it as a draft.

This article takes you from a blank form to a saved draft. Sending is a separate step: see "Send an invoice".

Before you start

- The customer must already be in your Customers list. You cannot save an invoice without one.
- If you want customers to pay online, connect Stripe first. See "Connect your Stripe account".

Steps

1. In the Hub, open **Invoices**, then tap **New invoice**. A window called **New invoice** opens. On the right is a live preview.
2. Under **Customer**, start typing the customer's name, phone or address. Pick them from the list. Their email and phone show under the box.
3. Choose a **Type**: Deposit, Progress, Final, Recurring / maintenance or Other.
4. Type a **Title**, for example "Spring clean-up – final payment".
5. Check the **Invoice date** and the **Due** date. The due date starts from your default number of days. You can tap a quick chip to change it. See "Due dates and terms".
6. Under **Lines**, fill in the first line: **Item or service**, **Quantity** and **Rate**. Add more with **+ Add line**. See "Line items, discounts and fields".
7. Check the totals under the lines. They show Subtotal, Discount (if any), Tax (if any) and Total.
8. Tap **Save draft**.

The invoice now appears in your list with the status Draft.

Starting from a quote

If an invoice belongs to a quote, the customer box is locked to that quote's customer. Invoices made from a quote also count against the quote total. The code will not let the invoices for one quote add up to more than the quote total plus signed change orders.

Tips

- Watch the live preview while you type. It is drawn by the server and matches the real page.
- Leave **Details** blank on a line unless you want a note printed under it.
- Use **Save draft** often. A draft can be changed freely.
- A line with no name is ignored when you save.

If something goes wrong

- **"Choose the customer (type their name and pick it from the list)."** You typed a name but did not pick it. Tap the match in the dropdown.
- **Nothing shows in the preview.** The preview is optional and can fail quietly. Save the draft and reopen it.
- **The form is greyed out.** Paid and voided invoices are read only. You can still copy the link or print them.

Line items, discounts and custom fields

Add services and lines, apply a discount, and add notes, custom fields and terms to one invoice.

Everything here is set inside the **New invoice** window (or when you open an invoice).

Lines

Each line has:

- **Item or service**, **Quantity**, **Rate**, and an amount that is quantity times rate.
- **Unit** (for example "hr" or "sq ft"), if the Unit column is switched on in Invoice design.
- **Service date**, if the Date column is switched on.
- **Details (optional)**, a note shown under the line.
- **Taxable**, a box that only appears when a sales tax rate is set.

Use the ↑ button to move a line up and the × button to remove one. If you remove every line, a blank one comes back.

Add service

Tap 🧩 **Add service** to use one of your service templates, or copy lines from a previous job or quote.

- A template line shows a small note such as "template v2".
- If the template has a billing frequency, the **Repeats** setting fills in for you.
- If the template has no default price, you are told to enter the rate.
- Lines copied from a quote come in with no amount. Enter the amounts for the invoice.

Discount

Under the lines, set **Discount**: type a number and choose **$** or **%**. Add a **Discount label** such as "Loyal customer discount". The discount shows on the invoice and cuts the taxable amount in proportion.

Custom fields, notes and terms

Open ➕ **Custom fields, notes, payment instructions & terms**:

- **Custom fields**: tap **+ Add a field (PO number, job site, work order…)**. Give a label and a value.
- **Notes**: anything the customer should know.
- **How to pay**: for example who to make checks out to.
- **Terms**: payment terms.
- **Thank-you message**.

Leave a box empty and your default from Invoice design is used. The default shows as grey text in the box.

Tips

- Put the PO number in a custom field if a business customer asks for one.
- Keep line names short. Put the long text in Details.
- A custom field you want on every invoice belongs in Settings, not here. See "Design your invoice".

If something goes wrong

- **The Taxable box is missing.** Set **Sales tax %** above it first.
- **Totals look off.** A percent discount takes a share of the subtotal. A dollar discount can never be more than the subtotal.
- **A section does not show for the customer.** Check that it is switched on in Invoice design.

Design your invoice

Set your logo, colors, font, layout, sections and default wording once, so every invoice looks the same.

You design your invoice once. Every new invoice uses that design.

Where to go

Open **Settings** in the Hub. In the **Money** group, choose 🧾 **Invoice design**. (From the Finance & Reports group, the item **Payments setup** opens the same place.) A live preview with a sample customer sits next to the form.

Steps

1. **Look.** - 🖼️ **Upload logo** to pick a picture. VisionScaper shrinks it to fit within 600 pixels. Or tap **Use my profile logo**, or **Remove logo**. - **Logo position**: Left, Center or Right. - **Logo size**: Small, Medium or Large. - **Layout**: Classic, Modern, Compact or Bold. - **Brand color**, **Font** and **Heading** (the big word on the page, "Invoice" by default). - **License / registration line**, for example your home improvement license number.
2. **Sections & order.** Tick the sections you want. Use the ↑ and ↓ buttons to move them.
3. **Line item columns.** Tick any of Date, Qty, Unit, Rate, Amount.
4. **Details to show.** Tick any of: Your address, Your phone, Your email, Your website, License line, Customer phone, Customer email, Service address, "PAID" stamp.
5. **Default content.** Fill in the text that goes on every invoice (see below).
6. **Default sales tax %** and **Default due in (days)**.
7. Review the **Default reminder plan**. See "The invoice reminder plan".
8. Tap **Save invoice design**.

The sections you can order

Logo & your business, Bill to, Invoice number & dates, Custom fields, Line items, Totals, How to pay, Notes, Terms, Thank-you message, Footer.

The thank-you message starts switched off. The pay button appears right after the Totals section.

Fonts

System (fast, no download), Inter, Roboto, Lato, Montserrat, Open Sans, Merriweather, Playfair Display, Source Serif and Roboto Mono. Any font other than System is loaded from Google Fonts when the customer opens the page.

Default content

- **Custom fields on every invoice**: label plus an optional default value.
- **Notes**, **How to pay**, **Terms**, **Thank-you message**, **Footer**.

The built-in default terms say that payment is due by the due date. Replace them with your own wording.

Tips

- Pick **System** if you want the page to load fastest on a phone.
- Use **Compact** if your invoices run long.
- Changing the design does not rewrite old invoices that already carry their own text.

If something goes wrong

- **Preview is blank.** The preview is optional. Save and reload.
- **The logo looks small.** Raise the Logo size to Large.
- **Your change did not stick.** You must tap **Save invoice design**.

Send an invoice

Send an invoice by email, text or both, add your own message, copy the link or print a PDF.

Saving a draft does not tell the customer. You send it on purpose.

Before you start

- The customer needs an email address to get an email, or a mobile number to get a text.
- Texting needs text messaging set up on your site and a plan that includes it. If it is not, the **Text** and **Both** choices are greyed out.

Steps

1. Open the invoice and tap **Save & send**. (If it was already sent, the button says **Save & send again**.)
2. In the **Send the invoice** window, choose ✉️ **Email**, 💬 **Text** or ✉️ **+** 💬 **Both**.
3. Optional: write your own message in the box. It replaces the usual wording. Merge tags such as `{customer_first_name}` and `{invoice_link}` work in it.
4. Tap **Send**.

A toast says "Invoice sent." The status becomes Sent.

Other ways to share

Open the invoice. The extra buttons are in the status line's ••• list, or in the button row on older screens:

- **Copy link** copies the customer's page address.
- 🖨️ **Print / PDF** opens the page ready to print or save as a PDF.
- 💰 **Mark paid** records a payment you got outside the website.
- **Void** cancels the invoice. See "Record payments, void invoices and refunds".

What the customer gets

The customer opens a web page that shows your design. If your Stripe account is ready, they see pay buttons. If not, they see a plain page. See "The customer payment page".

Tips

- If delivery fails, the error tells you what is missing and gives you the link to share by hand.
- Reminders start from the date you send. See "The invoice reminder plan".
- Use **Both** for customers who rarely read email.

If something goes wrong

- **"The invoice couldn't be delivered."** The customer has no email or mobile number, or text messaging is not set up. Add the detail on their record, or copy the link and send it yourself.
- **"Choose the customer."** You did not pick a customer. Pick one first.
- **Reminders or repeating invoices stopped.** Automatic reminders and repeating invoices pause while your own subscription is suspended for non-payment. See "Contractor plans and billing".

Due dates and payment terms

Set the due date on one invoice, choose quick terms, and change your default due days for all invoices.

The due date controls two things: when an invoice counts as late, and when your reminders go out.

On one invoice

1. Open the invoice.
2. Set the **Invoice date**.
3. Set **Due** with the date picker, or tap a quick chip under the dates: - **Due on receipt** (zero days) - **Net 7** - **Net 15** - **Net 30**
4. Save the invoice.

The chips count days from the **Invoice date**. If you change the invoice date, tap the chip again.

Your default

New invoices set the due date from your default number of days.

1. Go to **Settings** → 🧾 **Invoice design**.
2. Under **Default content**, set **Default due in (days)**. It accepts 0 to 120 days. The code's starting value is 14 days.
3. Tap **Save invoice design**.

The terms text

The **Terms** box on the invoice is wording only. It does not change the due date. Keep them in step: if you tap Net 30, say so in Terms. The built-in terms read "Payment is due by the due date shown. Thank you for your business."

How the due date affects other things

- **Reminders.** Each reminder is "before", "on" or "after" the due date. They go out at 10 am in the time zone of your website. See "The invoice reminder plan".
- **Late list.** The Unpaid invoices screen puts an invoice in a group by days past the due date. See "Unpaid invoices and late reminders".
- **Autopay.** An invoice marked for autopay is charged on its due date. See "Autopay".
- **Repeating invoices.** The copy keeps the same gap between invoice date and due date. See "Recurring invoices".

Tips

- Use short terms for small jobs and Net 15 or Net 30 for large ones.
- A deposit invoice made when a customer signs a quote gets a short due date set by VisionScaper (7 days in the older path; the schedule path is not verified in code).
- Changing the due date after you sent the invoice moves the reminder clock for reminders that have not been sent yet.

If something goes wrong

- **A reminder did not go out.** If the reminder time was already past when you sent the invoice, it is skipped. A reminder missed by more than two days is also skipped.
- **The chip gave the wrong date.** Check the invoice date first.

Recurring invoices

Repeat an invoice weekly, monthly, yearly or on a custom schedule for maintenance customers.

Use a repeating invoice for maintenance or mowing customers who pay on a regular cycle.

Before you start

Make the first invoice the way you want every copy to look: customer, lines, tax, notes and reminder plan.

Steps

1. Open **Invoices → New invoice**, or open an existing invoice.
2. Find **Repeats**. The choices are: - One time - Every week - Every 2 weeks - Every month - Every 3 months - Every year - Custom…
3. For **Custom…**, a row **Every** appears. Type a number from 1 to 365 and choose days, weeks, months or years.
4. Set **Type** to **Recurring / maintenance**. (Choosing a repeat while Type is Final switches Type to Recurring for you.)
5. Tap **Save draft** or **Save & send**.

If you pick a service template that has a billing frequency, **Repeats** fills in by itself and a message tells you so.

What happens on each cycle

The next copy is scheduled one interval after the invoice's **due date**. (For example, a monthly invoice due on the 15th makes its next copy on the 15th of the next month.) A background task checks every few minutes. When the date arrives, VisionScaper makes a copy:

- It gets the next invoice number.
- Its status is **Sent**, and the customer is emailed the invoice link.
- It keeps the same number of days between invoice date and due date as the original.
- Its reminders start fresh.
- The original stops repeating and the copy carries on the repeat, so the chain moves forward.

If the due date falls on a day your own subscription is suspended, repeats wait and resume when the account is active again.

Tips

- Check the customer's email address before you turn repeats on, since copies are emailed automatically.
- Use **Void** on the latest invoice to stop a chain.
- If the price changes, edit the line on the next copy.

If something goes wrong

- **"Set how often the custom repeat goes out."** The custom number must be at least 1.
- **Copies did not appear.** The repeat check runs in a background task. It handles up to 60 invoices per run. A paused account does not make copies.
- **A copy went to the wrong person.** Void it and fix the customer's email.

Sales tax on invoices

Set a default tax rate, mark lines taxable or not, and see how discounts and tax are worked out.

VisionScaper adds one sales tax line to an invoice. It does not look up rates for you. You type the rate.

Where the tax rate lives

- **Default rate for invoices:** Settings → 🧾 **Invoice design** → **Default content** → **Default sales tax %**.
- **Rate on one invoice:** the **Sales tax %** box in the invoice editor.
- **Rate on quotes:** Settings → **Costs & markups** → **Sales tax (%)** and **Tax applies to**. The hint there says to use your state's rate and check with your accountant.

The rate can be 0 to 30.

Steps

1. Set **Default sales tax %** once in Invoice design and save.
2. On a new invoice the rate fills in from your default. Change it if this job is different.
3. Add your lines. When a rate is set, each line gets a **Taxable** box.
4. Untick **Taxable** for lines that should not be taxed.
5. Check the **Tax** row in the totals.

How the numbers work

1. Subtotal is the total of all lines.
2. A discount is taken off.
3. Tax is figured only on the taxable lines, after the discount is shared across them in proportion.
4. The tax is rounded to the cent and added.

The invoice page shows "Sales tax (x%)" as its own row.

Tips

- If a quote is signed, its total already includes tax. Invoices made from the payment schedule carry no extra tax line.
- Ask your accountant which of your services are taxable. VisionScaper does not decide that.
- In the Profit and loss report, sales tax is not counted as money in.

If something goes wrong

- **No Taxable box.** The rate is 0. Enter a rate first.
- **QuickBooks totals do not match.** The sync checks totals and parks the invoice under Needs your review if they differ.
- **Xero.** Sales tax goes across as its own line so totals match to the cent. Matching it to Xero tax rates is for your bookkeeper.

The invoice reminder plan

Set up automatic reminders before, on and after the due date, by email, text or both.

A reminder plan is a list of automatic messages tied to the due date. Reminders stop the moment the invoice is paid.

The starting plan

Out of the box the plan has six reminders:

When	By	On?
3 days before due	Email	On
On the due date	Email + text	On
3 days after	Text	On
7 days after	Email + text	On
14 days after	Email	On
30 days after	Email	Off

Change the default plan

1. Go to **Settings → 🧾 Invoice design**.
2. Scroll to ⏰ **Default reminder plan**.
3. On each row use the tick box to switch it on or off.
4. Set the number of days and choose **before due**, **on the due date** or **after due**.
5. Choose **email**, **text** or **email + text**.
6. Tap **Edit message** to change the wording. Merge codes you can tap: First name, Customer, Invoice #, Title, Amount, Due date, Days late, Days until due, Pay link, Your company, Your name.
7. Tap **+ Add a reminder** for another row (up to 12 in total).
8. Tap **Save invoice design**.

Use **Send me a test** under a message to send it to yourself first.

Change the plan for one invoice

In the invoice editor open ⏰ **Reminders & messages** and choose:

- **My default plan**
- **Custom for this invoice**
- **No reminders**

Rules to know

- Reminders go out at 10 am in your website's time zone.
- Only invoices with status Sent get reminders.
- If a reminder's time was already past when you sent the invoice, it is skipped. One missed by more than two days is also skipped.
- Texts never go out overnight. A text held for quiet hours waits for the morning.
- "Reply STOP to opt out" is added to texts automatically. Texts are kept to 600 characters.
- Texts need text messaging set up and a plan that includes it. Without it, a text reminder falls back to email only.
- Reminders pause while your own subscription is suspended.

Tips

- Keep the tone friendly early and firmer after two weeks.
- Give a phone number in the message so people can call.

If something goes wrong

- **No reminders arrived.** Check status is Sent, the customer has an email, and the plan is not set to "No reminders".
- **A text did not go.** See quiet hours above, and check the customer's mobile number.

Record payments, void invoices and refunds

Mark an invoice paid when you got cash or a check, void a wrong invoice, and know how refunds work.

Online payments mark an invoice paid by themselves. Money you collect any other way, you record.

Mark an invoice paid in the Hub

1. Open the invoice. Open the ••• list if the buttons are tucked away.
2. Tap 💰 **Mark paid**. The button shows for Sent invoices and for invoices with a bank payment clearing.
3. A box asks "Paid how?" and suggests cash, check number or Venmo. Type how it was paid.
4. Confirm. The invoice becomes Paid and the activity log records the method.

Record a payment on the phone

The phone app can record cash, check or other payments, including **partial** ones. The server enforces these rules:

- The method must be cash, check or other.
- The amount cannot be more than the balance.
- A payment date cannot be in the future or more than 400 days back.
- Retrying the same request will not save it twice.
- When the recorded payments add up to the invoice amount, the invoice becomes Paid. A deposit invoice then moves its quote to "Deposit paid".

A part-paid invoice shows **Part paid**. (The exact phone-app screen names are not verified in this web code.)

The double-payment guard

If you have already recorded a cash or check payment on an invoice, the online pay link will not charge the full amount again. The customer sees a message to contact you. The same guard stops autopay. If a customer pays online and a payment was recorded by hand, you get a "Possible double payment" alert.

Void an invoice

1. Open the invoice and tap **Void** (in the ••• list).
2. Write why. A few words are required.
3. Confirm. The status becomes Voided and the reason stays in the activity log.

A voided invoice is not deleted. It never counts as income in the Profit and loss report. QuickBooks and Xero are told it was voided, not deleted.

Refunds

VisionScaper has no refund button. What the code says:

- Card payments: "Refunds are made in your Stripe dashboard. Voiding a record here does not send money back."
- Use the Stripe link under **Settings → Get paid online** (**Open my Stripe account**) to reach your dashboard.
- Refunds are not counted in the Profit and loss report.

After you refund in Stripe, record the matching change in your own books.

Tips

- Always say how it was paid so your books are clear.
- Void, do not delete. The history helps if there is a dispute.

If something goes wrong

- **"A payment of $X was already recorded."** You tried to pay online in full after a partial record. Ask the customer to pay the balance another way.
- **Mark paid is missing.** The invoice may be a draft, already paid or voided.

Unpaid invoices and late reminders

See who owes you by age, drill into one customer, send a reminder or an emailed statement.

This screen answers one question: who still owes me, and for how long?

Open it

1. In the Hub, open **Invoices**.
2. Tap 💵 **Unpaid invoices**. (The menu also lists it under Finance & Reports.)

What you see

At the top, **Owed to you** shows the total. Under it are tiles that group the money by how late it is:

Tile	Meaning
Current	Not past due yet
1-30 days late	
31-60 days late	
61-90 days late	
90+ days late	

Each tile shows the dollar total and the number of invoices. Tap a tile to show only the customers in that group. Tap it again to clear the filter.

Below the tiles, each customer owing money is a row with their open invoices and, if late, the oldest invoice's days late. The note under the heading says a bank payment on its way is not counted until it clears.

Look at one customer

Tap a customer. A window lists each open invoice with its number, title, due date or "x days late", last reminder date and balance.

Remind

Tap 🔔 **Remind** beside an invoice to send a reminder now. It is greyed out if a reminder went out recently. The wait between reminders is 24 hours unless the owner changed it. Each action carries a unique key, so a double tap cannot send twice.

Send statement

Tap 📄 **Send statement** to email the customer a statement. It lists their open invoices with due dates and days late, the total due, and payments received in the last 90 days. A pay link is included for each invoice. A statement can go once per 24 hours by default. The customer needs an email address on their record.

If the customer has autopay on, the window says so.

Only the late ones

When opened from a late filter, a line says "Showing only invoices that are late." Tap **Show everyone who owes you** to see all.

Tips

- Work the 61-90 and 90+ tiles first.
- Use a statement when a customer has several open invoices.
- The automatic plan already sends reminders. Use Remind for a nudge now.

If something goes wrong

- **"Nobody owes you anything right now."** Good news, or all invoices are drafts.
- **Remind is greyed out.** A reminder was sent too recently. Wait for the gap to pass.
- **"needs an email address to receive a statement."** Add one to the customer.

Autopay

Let customers save a card or bank account so marked invoices are charged on the due date.

With autopay, a customer saves a card or bank account once. An invoice you mark for autopay is charged on its due date. It is off for the whole website until the site owner turns it on.

Before you start (site owner)

1. In WordPress go to **Settings → VisionScaper**.
2. Find **Automatic payments (autopay)** and tick the box. Its label says customers can save a card or bank account with Stripe, and that Stripe's saved-card and bank fees apply. Read Stripe's current fees first.
3. Save. Nothing is charged while the box is off.

The contractor must also have a ready Stripe account. See "Connect your Stripe account".

What the customer does

1. They sign in and open **My Projects**.
2. In the 💳 **Autopay** card, they find your business name and read the agreement line. It says you may charge the full invoice amount on the due date, and it lists your retry plan.
3. They tick the box to agree. Without it they see "Please tick the box to agree first."
4. They tap **Save a card or bank account on Stripe** and finish on Stripe's page.

VisionScaper stores only Stripe ids, the kind of method and the consent text and time. It never stores a card number.

Later, the customer can tap **Remove my saved card** (or **bank account**). You are told when they do, and their invoices stop being charged.

What you do

- Mark a single draft or open invoice for autopay. This is done from the phone app (the screen name is not verified in this web code).
- Switch one customer's autopay off or on, with a reason, from the phone app. Team members need the permission **Turn automatic payment on or off**.
- Set the retry plan. The owner can set up to six retries, each 1 to 14 days apart. The starting plan is 1, 3 and 5 days after each failure.

How it runs

- On the due date, the charge is tried once.
- If Stripe does not answer, the outcome is unknown. VisionScaper does not start a new charge. It sends the same request again later.
- If a charge fails, the customer and you are both told. The invoice stays open and the next retry is scheduled.
- After the last retry it stops and logs "Autopay gave up."
- If a cash or check payment was already recorded, autopay skips the invoice and tells you.

Tips

- Use autopay for repeating maintenance invoices.
- Customers who are not signed in to VisionScaper cannot save a method. They still pay by the normal link.

If something goes wrong

- **The Autopay card does not show.** The site owner has not turned autopay on, or the customer has no linked account.
- **"Waiting for Stripe to confirm."** Refresh in a minute after the customer finishes.
- **A charge says "Check Stripe".** The result could not be confirmed. Look in your Stripe dashboard. Nothing more is charged automatically.

Set up Stripe for your site (site owner)

Paste your Stripe secret key and webhook signing secret, add the webhook events, and turn on Connect.

This article is for the person who owns the WordPress site. Contractors do not do this part. One Stripe account on your site powers online invoice payments, AI credit packs, storage packs and subscriptions.

> Note: Stripe changes its screens often. Follow Stripe's current instructions for each step. This article names the VisionScaper fields and the exact event names.

Steps

1. Create or open your Stripe account and finish its business details so it can accept payments.
2. In Stripe, copy your **secret API key**. It starts with `sk_live_`. Use a test key (`sk_test_`) while you practice.
3. In WordPress, go to **Settings → VisionScaper**. Paste it into **Stripe secret key**.
4. In Stripe, add a **webhook endpoint**. Copy the exact address from the numbered instructions under **Selling extra AI credits** on the **Settings → VisionScaper** page. It is built from your own site address.
5. Add these events to the endpoint: - `checkout.session.completed` - `checkout.session.async_payment_succeeded` - `checkout.session.async_payment_failed` (bank payments) - `account.updated`
6. Copy the endpoint's **signing secret**. It starts with `whsec_`. Paste it into **Stripe webhook signing secret**.
7. In Stripe, turn on **Connect** (Express accounts) so contractors can connect their own accounts.
8. Click **Save Changes**.

What each event does

Event	What VisionScaper does
`checkout.session.completed`	Marks an invoice paid, or "Bank payment clearing" for bank payments. Also adds purchased credits or storage.
`checkout.session.async_payment_succeeded`	A bank payment cleared: marks the invoice paid.
`checkout.session.async_payment_failed`	A bank payment failed: the invoice opens again and the contractor and customer are told.
`account.updated`	Updates whether a contractor's Stripe account is ready to take payments.

Other events the code also handles

The settings page does not list these, but other features read them if you add them:

- Contractor subscriptions: `customer.subscription.created`, `customer.subscription.updated`, `customer.subscription.deleted`, `invoice.paid`, `invoice.payment_failed`.
- Autopay and card reader: `payment_intent.succeeded`, `payment_intent.payment_failed`, `payment_intent.canceled`.

How VisionScaper checks messages

It checks Stripe's signature, refuses messages older than 10 minutes, and applies each message once. A repeat is ignored.

Tips

- Practice in test mode first, including Instant Payouts.
- Credit purchases are also confirmed when the customer returns, so a missed webhook does not lose a purchase.

If something goes wrong

- **"Not configured" or "Bad signature."** The signing secret is empty or does not match this endpoint.
- **Contractors see "Online payments aren't set up on this website yet."** The secret key is empty.
- **Invoices stay unpaid after a payment.** Check that the events above are on the endpoint.

Connect your Stripe account

Contractors connect a Stripe Express account so customers can pay invoices by card or bank.

Customers' money goes straight to your own Stripe account. You set this up once.

Before you start

- The website owner must already have set up Stripe. If not, you see "Online payments aren't set up on this website yet." See "Set up Stripe for your site".
- Have your business details, a bank account for payouts and a way to prove who you are ready. Stripe asks for them.

Steps

1. In the Hub, open **Settings**. In the **Money** group, choose **Get paid online**. (You can also reach it from the item **Payments setup**.)
2. Read the rates note. It shows what card and bank payments cost with a $1,000 example.
3. Tap **Connect with Stripe**.
4. You go to Stripe. Follow Stripe's current instructions to finish the form.
5. Stripe sends you back to the Hub.
6. If the button now says **Finish Stripe setup**, Stripe still needs something. Tap it to continue.
7. Tap **Check status**. You want to see "✅ Ready to take payments."

What VisionScaper asks Stripe for

It creates an Express account for a US business, with your business name, email, website and the code for landscaping services. It asks for three abilities: card payments, bank (ACH) payments and transfers.

"Ready" means Stripe has turned on charges and you have submitted your details. VisionScaper learns about changes through the `account.updated` message, and it also checks when you tap **Check status**.

After you are ready

- The button changes to **Update my Stripe details**, and **Open my Stripe account** opens your Stripe dashboard.
- The invoice editor stops showing the tip about connecting Stripe.
- Customers see pay buttons on your invoices.
- Payouts reach your bank in about 2 business days.

Tips

- Use the same business name in Stripe and in your Business profile.
- Check your Stripe dashboard for payouts and refunds.

If something goes wrong

- **"Online payments aren't set up on this site yet."** Ask the website owner.
- **Still "⏳ Stripe still needs some details."** Tap **Finish Stripe setup** again and fill in what Stripe lists.
- **A customer sees "This contractor is still setting up online payments."** Your account is not ready yet.

Payment methods your customers can use

Card, Apple Pay, Google Pay, bank transfer (ACH), cash and check, and instant payouts to your debit card.

Which ways a customer can pay depends on your Stripe connection and on what the site owner switched on.

The methods

Method	How it works	Speed
Card, Apple Pay, Google Pay	The customer pays on Stripe's secure page.	Money reaches your bank in about 2 business days.
Bank account (ACH)	The customer pays from a bank account. Stripe tries an instant bank login first and falls back to micro-deposits.	Clears in about 4 business days.
Cash, check, other	You record it yourself. See "Record payments, void invoices and refunds".	As soon as you record it.
In person by card	Uses the phone app and a card reader or Tap to Pay. See "Card reader and Tap to Pay".	Same as card.
Instant Payout	You move your available balance to a debit card.	About 30 minutes.

What the customer sees

On an open invoice, a button 💳 **Pay $X by card** appears. If the site owner allows bank payments, a second button 🏦 **Pay by bank account** appears with a note that it takes about 4 business days.

Bank payments in detail

1. The customer starts a bank payment. The invoice shows **Bank payment clearing**.
2. You get a message that a bank payment started.
3. When it clears, the invoice becomes Paid and you get an alert. The customer gets a receipt.
4. If it fails, the invoice opens again. You and the customer are told, and the customer can pay by card or use another bank account.

While a bank payment is clearing, the customer cannot start a second payment, and you cannot record one by hand.

Instant Payouts

The site owner has to switch Instant Payouts on (it is off by default).

1. Open **Settings → Get paid online**. You must be connected and ready.
2. The ⚡ **Instant Payout** card shows "Available instantly".
3. Enter an **Amount** (at least $1). A line tells you the fee and what you receive.
4. Tap ⚡ **Pay out instantly**.

Stripe needs a debit card on your Stripe account. You can make up to 10 instant payouts a day. If the payout fails, the fee is returned.

Tips

- Offer ACH on big jobs. The fee is lower than for cards, but it takes longer.
- Tell customers who pay by bank that it can take several days.

If something goes wrong

- **Only the card button shows.** The site owner has not ticked the ACH option.
- **No Instant Payout card.** Instant Payouts are off, or you are not ready on Stripe.
- **"Nothing is available for an instant payout right now."** Payments become available shortly after they are made.

Processing fee settings (site owner)

Set the percent and fixed fee a contractor pays on card, bank and instant payments. Values are placeholders.

When a customer pays an invoice online, VisionScaper takes a processing fee out of the payment. The rest goes to the contractor's Stripe account. You set the fee here.

> Warning: Every rate named in this article is an unapproved placeholder from the plugin. Set your own rates after you check Stripe's current fees and your own costs.

Where to set them

1. In WordPress, go to **Settings → VisionScaper**.
2. Scroll to **Contractor payments (Stripe Connect)**.

The fields

Field	What it does	Starting value (placeholder, not approved)
Card payments, % per payment	Rate on each card, Apple Pay or Google Pay payment	3.5%
Card payments, fixed $ per payment	Added to the percent	$0.30
Bank (ACH) payments, % per payment	Rate on a bank payment	1.5%
Instant Payouts, % of the payout	Fee on an instant payout	2.5%

Two tick boxes sit beside them:

- **Let customers pay by bank account (ACH)** (on by default)
- **Offer contractors Instant Payouts** (off by default)

Before you switch on Instant Payouts, enable Instant Payouts and Account Debits (US) for connected accounts in Stripe, and test in test mode.

How the fee is applied

- The fee is sent to Stripe as an application fee on the payment.
- It can never be more than the payment.
- Stripe's own card fee is paid out of what you take, so your real margin is the fee minus Stripe's costs.
- An Instant Payout fee has a minimum of $0.50.

What contractors see

The **Get paid online** screen shows the rates in plain words with a $1,000 example. When a payment arrives, the activity log shows the amount, the processing fee and what the contractor receives. The card reader screen warns that the fee shown is a placeholder.

Steps

1. Decide your rates.
2. Type them into the four boxes.
3. Tick or untick the two options.
4. Click **Save Changes**.

Tips

- Set your rates before contractors start taking payments.
- Rates apply to new payments only.

If something goes wrong

- **Contractors receive less than expected.** Check the rates and remember the fixed amount.
- **ACH button missing for customers.** The ACH box is not ticked.

Deposits and payment schedules

Set a deposit when a quote is signed, a default payment schedule, and how invoices are made from it.

A payment schedule splits a job's price into payments, for example a deposit when the customer signs and the balance when you finish.

Set your defaults

1. Go to **Settings**. In **Prices and quotes**, open **Costs & markups**. Set **Deposit when signed (%)**. (The starting value in the plugin is a placeholder, not approved.)
2. Open **Terms & payments**. Under **Default payment schedule**, edit the rows. Each row has a label, a percent and a "when" line, for example "Deposit to schedule … when you sign" and "Balance … on completion".
3. Tap **+ Add payment** for extra rows, such as a progress payment. Tap the **×** to remove one.
4. Tap **Save**.

Change it on one quote

In the quote editor, find **Payment schedule**. Edit the label, percent and "when" text. Once a quote is locked, the rows are read only. **+ Add payment** adds a row ("Partial payment").

What happens when a customer signs

- The proposal tells the customer they can sign and pay the deposit to get on the schedule.
- A deposit invoice can be made for you when the quote is signed. By default it is saved as a draft. The owner can choose to have it sent automatically. That choice is a setting in the phone app and its API (the label is not verified in this web code).
- Look in **Invoices** for it. Check it and tap **Save & send** if it is still a draft.
- When the deposit invoice is paid, the quote's job shows **Deposit paid – ready to schedule**.

Progress and final invoices

Make the next invoice yourself in **Invoices → New invoice**, with Type **Progress** or **Final**. The phone app can also bill by percent complete and make invoices from the schedule's stages (screen names not verified in this web code).

The safety rule

The invoices for one quote can never add up to more than the quote total plus signed change orders. The editor, the schedule and the phone app all follow this rule. A quote's total already includes sales tax, so schedule invoices carry no second tax line.

Tips

- Keep percents adding up to 100.
- Voiding a stage invoice lets that stage be billed again.

If something goes wrong

- **No deposit invoice appeared.** The deposit may be 0, or an invoice for it already exists.
- **The customer cannot pay the deposit online.** Your pay link needs a ready Stripe account. See "Connect your Stripe account".

Connect QuickBooks Online

Create an Intuit app, paste its keys into Connected apps, and connect your company with sign-in (OAuth).

This first connection syncs your **customers** with QuickBooks Online. Invoices and payments are a second step: see "Send invoices and payments to QuickBooks". QuickBooks Desktop is not supported. Use CSV import and export instead.

> Note: Intuit changes its developer site often. Follow Intuit's current instructions. Below are the VisionScaper fields and what to paste where.

Steps

1. In the Hub open **Settings**, then 🔌 **Connected apps**. Find the **QuickBooks Online** card. Open 🛠️ **Set-up walkthrough**.
2. Sign in at Intuit's developer site with your QuickBooks login. Create an app for **QuickBooks Online and Payments**, with the scope `com.intuit.quickbooks.accounting`.
3. In the app's keys section, add the **Redirect URI** that VisionScaper shows you. Tap **Copy** beside it to copy it. For Production keys, Intuit asks you to finish a short questionnaire first.
4. Optional, for fast updates: add a **Webhooks** endpoint using the address VisionScaper shows (with the Customer entity). Intuit gives you a verifier token. Paste it into **Security key** in VisionScaper.
5. Paste the **Client ID** and **Client secret** into VisionScaper.
6. Pick **QuickBooks company**: **Production (my real company)** or **Sandbox (testing)**. Keys must match.
7. Choose **How data moves**: **Import only (into VisionScaper)**, **Export only (from VisionScaper)** or **Both ways (changes go each direction)**.
8. Tick **Update automatically every hour** if you want that. Leave **Pass on deletions** off unless you are sure (off is safer).
9. Tap **Save settings**, then **Connect QuickBooks Online**. Sign in and choose your company.

Your keys are stored encrypted and never shown again. A saved secret shows as dots. Leave it blank to keep it.

After connecting

The card shows "Connected to" your company, the mode, and the last update. Buttons: 🔄 **Update now**, ⬇️ **Import only**, ⬆️ **Export only**. Use **Disconnect** to revoke access and delete the saved keys. Customers stay in both places.

How the connection stays alive

Access lasts an hour and VisionScaper refreshes it before each call. The refresh key rolls. If Intuit refuses it, the card says QuickBooks needs you to reconnect. Tap **Reconnect**. Nothing is lost.

> Note: The QuickBooks card still says "Customers only for now (invoices and payments later)." That text is older than the money sync. The separate Send to QuickBooks card handles invoices and payments.

When a customer changed in both places

Nothing is overwritten. A ⚠️ **need review** button opens **Needs review**. For each customer choose **Keep VisionScaper's**, **Keep QuickBooks Online's** or **Decide later**.

Rules for customers

- QuickBooks needs a unique display name. On a clash, VisionScaper adds the town, then a number, and tells you.
- Deleting is passed on only if you ticked it. Even then QuickBooks makes the customer inactive.

If something goes wrong

- **"QuickBooks didn't accept the Client ID / secret (check Production vs Sandbox keys)."** The environment and keys do not match.
- **"QuickBooks says the connection expired or was removed."** Tap **Reconnect**.
- **Connect is greyed out.** Save the Client ID and secret first.

Send invoices and payments to QuickBooks

Turn on the money sync, run it, clear the Needs your review list and retry problems safely.

The **Send to QuickBooks: invoices, payments and expenses** card appears under the QuickBooks card once QuickBooks is connected. Both switches are off until you turn them on.

Before you start

Connect QuickBooks first. See "Connect QuickBooks Online".

Steps

1. Open **Settings → 🔌 Connected apps** and scroll to **Send to QuickBooks**.
2. Tick **Send invoices and payments to QuickBooks (hourly and when something changes)**. A message says open invoices go across on the next run.
3. Optional: tick **Also send approved expenses (only ones approved after you turn this on)**.
4. Tap **Run now** to send straight away.
5. Read the last-run line: when, what happened, and counts for Needs review, Failed and Retrying.

What gets sent

- Your service templates become Items in QuickBooks.
- Sent invoices become Invoices. Drafts and repeating "master" invoices are never sent.
- Payments you record become Payments, and payments made in QuickBooks come back.
- Approved expenses can go as Purchases, if you ticked that box.
- Invoices and payments from before you turned it on are not imported. Open invoices go first.

How it stays safe

- Nothing is ever deleted in QuickBooks. A cancelled invoice is voided, with the reason in the note.
- Every run compares both sides and acts only on what differs. Running twice repeats nothing.
- If both sides changed, nothing is overwritten. It goes to review.
- QuickBooks limits calls. VisionScaper goes slowly, up to 400 calls per run, and waits 15 minutes if QuickBooks keeps saying slow down.

The Needs your review list

Each row shows a reason and the two versions side by side. The reasons are: Changed in both places, Changed in QuickBooks, Invoice number already used in QuickBooks, Totals do not match, QuickBooks would not void it, Payment in QuickBooks does not match, Changed after it was sent.

Pick one: **Keep mine** (invoices and items only), **Keep QuickBooks'** (for a payment: **Record it here**), **Try again** or **Ignore**.

Problems and the log

- **Problems** lists items that failed. Tap **Retry** on each. Items marked "Will retry automatically" retry on their own.
- **Activity log** lists the latest items: When, What, Result, Note.

Tips

- Run it once after the first switch-on and look at the log.
- Totals matter. A tax mismatch usually means the QuickBooks tax setup differs.

If something goes wrong

- **"QuickBooks needs you to reconnect."** Reconnect on the QuickBooks card. What is waiting is sent afterwards.
- **"QuickBooks asked us to slow down."** The card shows the next try time.
- **Run now is greyed out.** The switch is off or reconnect is needed.

Send customers, invoices and payments to Xero

Connect Xero with your own app keys, choose accounts, and send your records one way to Xero.

Xero works one way. VisionScaper sends to Xero. It does not read Xero back. Xero is a plan feature, so you may see "Xero is not part of your current plan." Xero charges for its own plan. VisionScaper adds no fee.

Before you start

You need a Xero organisation and a Xero developer app of type web app.

Steps

1. In the Hub open **Settings → 🔌 Connected apps**. The **Xero** card is at the bottom.
2. In Xero's developer area, make a web app. Add the **redirect address** shown on the card. Follow Xero's current instructions.
3. Paste the **Client ID** and **Client secret** into the card. Tap **Save keys**. The secret is stored scrambled and never shown again.
4. Tap **Connect to Xero**. Sign in and choose your organisation. Only the owner can do this.
5. If you have more than one organisation, pick one in **Xero organisation**. Records already sent elsewhere are not sent again here.
6. Fill **Xero account for sales** (the usual code is 200) and **Xero bank account for payments**. Tap **Look up my Xero accounts** to pick from lists. The bank account is needed before payments can be sent.
7. Tick what you want: **Send automatically every hour**, **Send customers**, **Send payments**.
8. Tap **Save settings**, then **Send to Xero now**.

What you see

- **Last sent**, the result and counts: customers, invoices and payments sent so far.
- If Xero turns something down, a box lists the items and reasons. Fix them in Xero or VisionScaper, then tap **Try again after fixing**. A rejected record is parked and is not retried every hour.

How it stays safe

- Nothing is sent twice unless it changed. Before the first send, VisionScaper looks for the same invoice number or contact name in Xero and adopts it instead of making a copy.
- A voided invoice is voided in Xero. A voided payment is deleted there.
- Sales tax goes across as its own line so totals match to the cent. Matching it to Xero tax rates is the bookkeeper's job.

Disconnect

Tap **Disconnect**. Nothing in Xero is deleted. Reconnecting later will not send anything twice.

Tips

- Ask your bookkeeper which Xero accounts to use.
- Run **Send to Xero now** after you fix problems.

If something goes wrong

- **"Xero needs you to sign in again."** Tap **Reconnect**. Nothing sends until you do.
- **Payments will not send.** The bank account code is empty.

Profit and loss report

See money in, costs and profit for any dates, plus a cash summary and what is owed. Download as CSV.

This is a plain report of what came in and what went out. It is a management report, not tax or accounting advice. It does not replace your bookkeeper's books.

Before you start

- Profit and loss is a plan feature. Without it you see a locked page.
- You need the right to see company money. Owners have it. Others only if the owner gave it to them.

Open it

In the Hub, open **Finance & Reports → Profit and loss**. (The address ends in `money/pnl`.)

Steps

1. Choose the dates. Type **From** and **To**, or tap a preset: **This year so far**, **This quarter**, **This month**, **Last month**, **Last year**.
2. Choose **Columns**: By month, By quarter or By year.
3. Choose **Count money**: **Accrual: by invoice and bill dates** or **Cash: when money moved**.
4. Tap **Show report**.
5. Read the three cards at the top: **Money in**, **Costs**, **Profit**. Profit also shows as a percent of money in.
6. Read the table below. Each column is one period, with a Total on the right.
7. Tap **Download for a spreadsheet** for a CSV file.

What is counted

- **Money in** (accrual): invoices that are sent, processing or paid, on the invoice date, before sales tax. Never drafts or voided invoices.
- **Money in** (cash): payments actually received. Sales tax is taken out.
- **Costs**: approved expenses by category, approved supplier bills, and crew labor from approved time at the saved cost rate.
- A purchase order is not a cost by itself. Only its bills are.
- The last line is **Profit before owner pay and taxes**.

What is not counted

Unapproved time, time with no cost rate, payroll taxes and benefits, depreciation, owner draws, refunds, and anything not recorded in VisionScaper. The report says so under **What is and is not counted**.

The cash summary

Tap the **Cash summary** tab for **Cash in**, **Cash out** and **Net cash**. Under it, **Owed right now** shows what customers owe you and what you owe suppliers, split into Not due yet, 1 to 30, 31 to 60 and over 60 days late.

Tips

- Use Accrual to see how a month's work did. Use Cash to see money that moved.
- Approve expenses and supplier bills first, or they will not show.
- Send the CSV to your accountant.

If something goes wrong

- **"Nothing in these dates."** No invoices, payments, bills or expenses fall inside the range. Tap **Look back a year**.
- **Numbers differ from QuickBooks.** The report counts only what VisionScaper holds.

Customer financing

Offer customers a way to pay over time through your own lender. VisionScaper tracks the application but never lends.

VisionScaper does not lend money, make credit decisions or approve anyone. You use your own lender. VisionScaper makes a personal apply link for a quote and tracks where the application stands.

Before you start

- Financing is a plan feature. Without it you see "Customer financing is not part of your plan."
- You need a lender who gives you an apply web address.

Set it up

1. In the Hub open **Finance & Reports → Customer financing**.
2. Under **Your lender**, pick **How it works**: - **Apply link**: the complete mode. Paste your lender's apply address. - **Lender's application service (advanced)**: for a lender with an application service address and key. It needs a developer to match the lender's field names and has not been tested with any live lender.
3. Type the **Lender name** and **Your lender's apply address**. It must start with `https://`. You can use `{reference}` and `{amount}` in it. If you do not, they are added at the end.
4. Set the **Example APR for estimates (%)** (a placeholder, not approved), **Loan lengths to show (months)** and **Smallest quote to offer it on ($)**.
5. Edit **Words shown with every estimate**. The starting wording is a placeholder, not approved. Have your lender or lawyer check it.
6. Tick **Financing is on**. Optionally tick **Put the customer's name, email and phone in the apply link**.
7. Tap **Save financing settings**.

Offer financing on a quote

Open a quote. The **Financing** line shows the status. Tap **Offer financing**, then **Copy apply link** and send it to your customer. A quote under your minimum or with no total shows a reason instead.

Track the application

The **Applications** list shows each one with a status: Offered, Applied, Approved by the lender, Declined by the lender, Funded. Under each label is a note: "marked by you" or "confirmed by the lender".

To move a status yourself, use **Mark as…** and tap **Save**. A lender message that would move a status backward is ignored.

Let the lender report

Open **Let your lender tell VisionScaper the result**. Tap **Make a secret**, copy it at once (it is shown once) and give your lender the address and secret. The lender's messages must be signed. Then statuses show "confirmed by the lender".

Try a monthly payment

Try a monthly payment takes an amount and an APR and shows a table of months, payment, total and interest. It is an illustration, not an offer.

Tips

- Use the rate your lender gives you, not the example.
- Offer again after a decline with **Offer again**.

If something goes wrong

- **"Not ready yet."** Turn financing on and paste the apply address.
- **The lender's messages are refused.** The secret does not match. Make a new one and give it to the lender.

Card reader and Tap to Pay

What the Hub's Card reader page does, and what needs the phone app: payment requests and recording card payments.

The Card reader page helps you take card payments in person. Read this first: **a web page cannot read a card.** Tap to Pay on iPhone or Android and Bluetooth readers need the VisionScaper phone app, which uses Stripe's Terminal software. The Hub page sets things up, makes the request the phone collects, and shows what Stripe confirmed.

Before you start

- Card reader is a plan feature.
- The site owner needs a Stripe key set. You need a ready Stripe account. See "Connect your Stripe account".
- The tools the phone app itself uses to read a card are not part of this web code, so this manual does not describe the phone screens.

Set up (owner)

1. In the Hub open **Finance & Reports → Card reader**.
2. In **Setup**, tick **Card reader is on**.
3. Open **Where do you take payments?**. Fill **Place name**, **Street**, **Town**, **State**, **ZIP code**. Tap **Save the place**. Stripe needs the address your reader is based at. It is only used to register the reader.
4. When it says "Ready. The phone app can now take card payments", you are set.

Only the owner can change these settings.

Ask for a card payment

1. Under **Ask for a card payment**, choose an **Invoice**. Only sent invoices with a balance are listed.
2. Optional: type an **Amount ($)**. Leave it empty for the whole balance.
3. Tap **Make the payment request**.
4. Open the phone app, choose this payment, and tap or insert the card there.

The invoice is not marked paid until Stripe confirms the charge. The page then shows **Paid**. A request can be cancelled while it says **Waiting for the card**. A request that is stuck shows **Needs your attention**: check your Stripe account.

Record a card payment you already took

For a card you charged on another machine:

1. Under **Record a card payment you already took**, choose the **Invoice**.
2. Enter **Amount charged ($)**. It cannot be more than the balance.
3. Optional: **Last 4 digits of the card**, **Approval code**, **Date taken**, **Note**.
4. Tap **Record this payment**.

It is saved as "recorded by you, not checked with Stripe". Never type a whole card number.

Card payments list

Card payments lists requests and payments. A voided record shows as Voided.

Tips

- Money goes to your Stripe account with the same fee setup as online payments. The fee shown is a placeholder, not approved.
- Refunds are made in your Stripe dashboard. Voiding a record here does not send money back.

If something goes wrong

- **"You have no sent invoices with a balance."** Send an invoice first.
- **Make the payment request is greyed out.** Setup is not finished. Read the line that starts "Not ready yet".

Sell AI credit packs and extra storage (site owner)

Let signed-in customers buy AI credits and extra online storage with Stripe, and see recent purchases.

Signed-in customers get free daily AI credits and some free online storage. When they run out, they can buy more on Stripe's checkout page. Purchased credits and storage never expire.

> Warning: The pack names, sizes and prices that come with the plugin are placeholders, not approved. Set your own.

Before you start

- Set up Stripe first. See "Set up Stripe for your site".
- The credit store also needs your image-generation API key saved on the same page. Without it the store stays hidden.
- The storage store needs a free storage amount set under **Customer accounts** on the same page.

Credit store steps

1. In WordPress go to **Settings → VisionScaper** and find **Selling extra AI credits**.
2. Tick **Let customers buy extra AI credits**. Optionally tick **Email me about each purchase**.
3. In **Credit packs**, write one pack per line: `Name | credits | price in dollars`. Up to four packs look best.
4. Set **Price per single credit ($)** for a custom amount. Set 0 to sell packs only.
5. Set **Minimum custom purchase (credits)**. The most a customer can buy at once is 500.
6. Click **Save Changes**.

Storage store steps

1. Find **Selling extra library storage**.
2. Tick **Let customers buy extra storage**.
3. In **Storage packs**, write one per line: `Name | megabytes | price in dollars`. 1 GB is 1024 MB.
4. Click **Save Changes**.

What the customer sees

- **AI credits** window: free credits left today, purchased credits, and credits ready to use. Pack buttons show credits, price and price each. The cheapest per credit is tagged **Best value**. A stepper lets them pick an exact number.
- **My storage** window: a usage bar, what uses space, and storage pack buttons.
- Checkout is on Stripe. They can use a card, Apple Pay or Google Pay. You never see the card number.
- Coming back from Stripe, they see a thank-you. If the payment is still processing, they see that instead.

Purchased credits are used after the free ones run out.

Recent purchases

Below the settings, a **Recent purchases** table lists the latest 30: Date, Customer, Email, Bought, Paid.

Tips

- Check that each pack's price covers Stripe's fee and your AI cost.
- Each purchase is counted once, even if Stripe sends the message twice.

If something goes wrong

- **The store does not show for customers.** Check the store box, the Stripe secret key and the image-generation key.
- **Credits missing after paying.** They are added when Stripe confirms. Add the `checkout.session.completed` event to your webhook.

Your plan and billing (contractors)

Start the free trial, choose or change a plan, update your card, cancel, and see your usage.

This is where you pay VisionScaper for the Contractor Hub. If the website owner has not switched billing on, you see "Everything is included" and pay nothing.

Open it

In the Hub menu, choose **Current plan**. At the top is a banner with your status. Below it are your plans, your usage, your exports and your billing history.

Start your free trial

1. Tap **Start N-day free trial** on the offered plan. (N is set by the site owner.)
2. Verify your business. VisionScaper emails you a six-digit code. If text messaging is set up, it also texts one.
3. Tap **Add card & start my free trial**. You go to Stripe's secure checkout.
4. You are not charged today. The paid plan starts on the first day after the trial unless you cancel. You get an email a week before and the day before.
5. It is one free trial per business.

During the trial the plan has a smaller AI credit and landscape plan allowance than the paid plan.

Choose or change a plan

1. Pick **Monthly** or **Yearly** at the top of the plans.
2. Tap **Choose [plan]**. If you already pay, the button says **Switch to [plan]** and Stripe works out the difference for the rest of the period.
3. A plan you cannot buy yet shows "Not available yet".

> Note: Plan prices, allowances and which features each plan has are placeholders until the site owner approves them. Read the plan cards on your site for the real figures.

Your usage

Your usage shows bars for employees, crews, AI credits, landscape plans and storage. Monthly allowances start again on the 1st. Reaching a limit never deletes anything. It only stops you adding more.

Card, invoices and cancel

- 💳 **Card, invoices & receipts** opens Stripe's portal to change your card and see receipts.
- **Cancel subscription** opens a window. Tap **Cancel at the end of this period**. You keep full access until then and your records stay for at least the retention period shown.
- Changed your mind? Tap **Keep my subscription**.
- Tick the box to get a text if a payment needs attention (never overnight), when texting is set up.

If a subscription payment fails

A failed payment moves your account through stages. Days count from the first failure. The starting days below are the code's defaults, and the site owner can change them.

Stage	From day	What happens
Notice	0	Full access. A quiet banner, with an email.
Reminder	4	Full access. A stronger banner.
Restricted	8	New AI work, new landscape plans, buying credits or storage, large uploads and automatic follow-up texts pause. Quoting and invoicing still work.
Read-only	11	You can view, export and pay. You are hidden from new homeowners.
Suspended	14	Banner: "Suspended — Payment Required".

Tap **Update Payment Method & Restore Account** (or **Update payment method**) and pay. Everything comes back at once. Nothing is deleted. Follow-ups that fell due while you were suspended wait for you to review on your overview screen.

Export anytime

📦 **Export your records** gives CSV downloads, even if you are suspended or cancelled. See "Export your data".

Tips

- Check the "After your trial" note. It lists features that move behind an upgrade.
- Use the plan quiz and comparison table on the page to pick a plan.

If something goes wrong

- **A payment failed.** Use the banner button to update your card. See the stages above.
- **"That card has already been used for a free trial."** The trial is cancelled and you are not charged.

Set up contractor plans and billing (site owner)

Turn on billing, set the trial and plans, create the Stripe prices, and handle non-payment and exceptions.

You decide whether contractors pay to use the Contractor Hub. While billing is off, every approved contractor has full access for free.

> Warning: The plan names, prices, limits and feature lists in the plugin are unapproved placeholders. Check them before you turn billing on.

Before you start

Set up Stripe first. See "Set up Stripe for your site". Without a secret key, the plans page warns you, and a site with billing on but no key fails closed: nothing can be bought.

Steps

1. In WordPress go to **Settings → VisionScaper Plans**.
2. Fill in the plan table: **Name**, **Tagline**, **Most popular badge**, **What's included**, **Not included**, **Price per month**, **Price per year**, and each limit or feature.
3. Click **Save plans**.
4. Click **Create these plans in Stripe**. This makes a Stripe product and monthly and yearly prices from your saved amounts and fills in the **Stripe price ID** boxes. Or paste price IDs you made yourself.
5. In Stripe, add these events to your webhook endpoint: `customer.subscription.created`, `customer.subscription.updated`, `customer.subscription.deleted`, `invoice.paid` and `invoice.payment_failed`. Keep `checkout.session.completed`.
6. The page then lists settings to make in Stripe's customer portal and in its failed-payment (revenue recovery) area. Follow Stripe's current instructions and the page's wording. It also asks you to turn off Stripe's own failed-payment emails, so contractors hear one voice.
7. Tick **Turn on contractor billing** and save. Contractors approved before today get one grandfathered trial.

The trial

Set the **Free trial** days (0 to 90) and the plan it uses. Optionally require a phone verified by text (needs Twilio). Set the **Trial allowances** for AI credits and landscape plans.

When a payment fails

You set the day each stage starts: reminder, restricted, read-only, and the day of suspension. The restricted stage has separate tick boxes for AI, new landscape plans, buying credits or storage, large uploads (you choose the size in MB) and automatic follow-up texts. Appointment reminders, receipts and invoices keep going. After a number of unpaid days the account is only flagged as eligible for deletion. Nothing is deleted automatically.

Other settings

- **Fair use**: an alert when an "unlimited" plan makes more than your set number of landscape plans in a month. Nothing is blocked.
- **Keep data after cancelling**: months shown to contractors.

Manage one contractor

The **Contractors** table shows each business, status, plan, trial or renewal date and last payment. A summary line shows monthly recurring revenue and counts. In **Owner actions** choose one of: Extend trial, Give free access (comp), End free access, Give more time to pay (days), Suspend now, Restore, Grant a second trial (exception), Set plan. Most need a written reason, which is logged.

Tips

- Changing prices applies to new subscriptions. Existing subscribers stay on their Stripe price until you move them.
- Practice with test keys first.

If something goes wrong

- **A warning about Stripe keys.** Save your keys on **Settings → VisionScaper**.
- **"Please write a reason."** The action you picked needs one.

The customer payment page

What your customer sees when they open an invoice link: the invoice, pay buttons, receipt and print option.

Every invoice has its own web address. The customer opens it from your email or text. They do not need a VisionScaper account.

What the page shows

The page uses your invoice design: your logo and business details, the customer, the invoice number and dates, line items, totals, notes, terms and footer. The due date is large and in your brand color. Search engines are told not to list the page.

At the top right is a 🖨️ **Print / Save PDF** button.

The pay box

The pay box sits just under the totals when the invoice is open and your Stripe account is ready.

- 💳 **Pay $X by card**: Card, Apple Pay or Google Pay on Stripe's page.
- 🏦 **Pay by bank account**: only if the site owner allows bank payments. It takes about 4 business days to clear.
- A line says the payment goes through Stripe and that your business receives it directly.

If your Stripe account is not ready, there is no pay box. Use the **How to pay** text to tell the customer what to do, for example "Checks payable to...".

After the customer pays

1. They return to the invoice page after Stripe.
2. A card payment marks the invoice **Paid**, and the **PAID** stamp can show.
3. A bank payment shows "Bank payment processing" with a note that it clears in about 4 business days and a receipt follows.
4. You get an alert. The customer gets a payment receipt, even if your account is paused.
5. The invoice's activity log shows the method, the processing fee and what you receive.

Messages the customer can see instead of paying

- "This invoice is already paid. Thank you!"
- "Your bank payment is already on its way."
- "An automatic payment for this invoice is being processed right now."
- "A payment of $X was already recorded on this invoice, so it can't be paid online in full."
- "This contractor doesn't take online payments yet. Please pay them directly."

For you

- Open the page yourself with **Copy link** to check it.
- Use the editor preview to see the design before sending.

Tips

- Keep **How to pay** filled in. It helps when a customer wants to pay by check.
- Printed copies hide the pay box.

If something goes wrong

- **Customer says the pay button is missing.** Your Stripe is not ready, or the invoice is not in the Sent state.
- **Customer says "Invoice not found."** The link may be wrong or the invoice may be voided or still a draft.

Export your data

Download invoices, customers and more as CSV, the profit and loss report, or a full ZIP copy of your account.

Your records are yours. Several screens let you download them. Exports from Plan and billing work on any plan, even if your account is paused or cancelled.

Export your records (CSV)

1. In the Hub menu open **Current plan**.
2. Find 📦 **Export your records**.
3. Tap one of: **Customers**, **Properties**, **Quotes**, **Invoices**, **Schedule**, **Activity log**.

Each downloads a spreadsheet (CSV) file you can open in Excel or Google Sheets. The same buttons show in the cancel window.

Customers: CSV and vCard

On the Customers page open **⇅ Import / Export**. You can export all, filtered or selected customers to CSV or vCard. You can also use it to import from files made by QuickBooks, Google or other tools.

Profit and loss as a CSV

On **Finance & Reports → Profit and loss**, tap **Download for a spreadsheet**. The file includes the basis and the "not tax advice" note.

A full copy of your company

1. Open **Settings → Your data**.
2. Under **Download a copy of your data**, type **Your password**.
3. Tap **Make a copy**. A large account can take a few minutes. You can leave the page.
4. When it says **Ready**, tap **Download the ZIP**.

The ZIP has one JSON file and one CSV file for each kind of record, such as customers, jobs, quotes, invoices, payments, messages and team. Pictures are listed by name, and small ones are included. Passwords, secret keys and private links are left out. The link stops working after a set number of days shown on the page.

Send data to your accountant

- Use the Profit and loss CSV for the numbers.
- Use QuickBooks or Xero sync so invoices and payments go across. See "Connect QuickBooks Online" and "Send customers, invoices and payments to Xero".

Tips

- Keep downloaded files safe. They hold personal details.
- Export before you cancel, though you can still export afterwards.

If something goes wrong

- **The export asks for a password.** It is the password for your VisionScaper sign-in.
- **The download link stopped working.** Make a new copy.
- **A number is missing in a CSV.** The CSV matches what is recorded in the Hub.

Marketing & messaging

Texts, email, campaigns, reviews and the AI Receptionist.

How messaging works in VisionScaper

A map of texts, email, the inbox and the settings screens, and who sets up what.

VisionScaper sends and receives texts and emails for your business. Some parts are set up once by the person who runs the website. Other parts are yours to change any time. This article shows which is which.

Two kinds of setup

Site administrator (WordPress admin). These screens live under Settings in the WordPress admin menu:

Screen	What it holds
Settings → VisionScaper	Your Twilio Account SID, Auth Token, phone number and optional Messaging Service SID
Settings → VisionScaper Messaging	Text service (Twilio or Telnyx), email service (Resend, SendGrid, Amazon SES), safety switches, monthly limits, message packs, and approval of "Get ready to text" requests
Settings → VisionScaper Marketing	Postmark or the site's own mail, sender address, the Postmark webhook, missed-call numbers, cost and sending speed
Settings → VisionScaper AI Receptionist	Voice service keys and phone-call settings (see the AI Receptionist articles)

You, in the Contractor Hub.

Where	What you do
Messages (Inbox)	Read and answer conversations with customers and members
Marketing → Conversations	Two-way text conversations with customers
Marketing → Safety	"Get ready to text", email sender check, sending rules, auto-replies, the AI notice
Marketing → Consent	Who agreed to marketing texts, and proof
Marketing → Campaigns, Automations, Reviews, Reminders	Outgoing marketing
Settings → Messages & alerts	The wording of every automatic message
Settings → Reminders	Appointment reminders
Settings → Quick replies	Your saved short answers

How a message is sent

1. Something triggers it: a booking, an invoice, a campaign or an automation.
2. VisionScaper checks the safety rules. It will not send if the person opted out, texting is not approved yet, the site kill switch is on, or a monthly limit is reached.
3. It picks the channel and sends it through the text or email service you chose.
4. The result (sent, delivered, failed, bounced) comes back through a webhook and is saved on the customer.

Before anything sends

- Texts need a working text service. See "Set up Twilio for texting" or "Set up Telnyx for texting".
- Email needs a sender address and an email service. See "Set up your email service".
- In the US, text messages need carrier registration. See "Get ready to text (A2P 10DLC)".

Tips

- If your site has plans, some features (quick replies, AI features, texts) depend on your plan. A locked screen tells you so.
- Prices, allowances and message packs shown in the code are placeholders and not approved. Ask the site owner for the real ones.

If something goes wrong

- A message did not go out: open the customer's Conversations thread or the Marketing page. A held message shows the reason in plain words, for example "They asked not to be contacted".
- Nothing sends at all: a banner "Messaging is switched off for this whole site" means the kill switch is on. Only the site administrator can turn it off.

Set up Twilio for texting

Paste your Twilio details into Settings → VisionScaper and point incoming texts at VisionScaper.

Twilio is the default text service. This is a task for the site administrator, and you do it once for the whole site.

Before you start

- You need a Twilio account and a phone number that can send texts. Follow Twilio's current instructions to create the account and buy the number.
- In the US, carriers block texts until your business is registered for A2P 10DLC. Twilio explains this in its own Console. VisionScaper's own settings page tells you to register a "Customer care / account notifications" campaign for service texts.
- For marketing texts, the Marketing settings page says you need a separate A2P 10DLC campaign with the use case "Marketing" or "Mixed". A "Customer care" campaign alone is not allowed to carry promotions.

Steps

1. In WordPress, go to **Settings → VisionScaper**. Find the section **Text messages (Twilio)**.
2. Paste your **Twilio Account SID** (it starts with `AC`).
3. Paste your **Twilio Auth Token**.
4. Enter **Twilio phone number** in the form `+18605550100`. You can leave this empty if you use a Messaging Service.
5. Optional but recommended: in Twilio, create a Messaging Service, add your number to it, and paste its SID (starts with `MG`) into **Messaging Service SID (optional)**.
6. Save.
7. In Twilio, open your phone number (or the Messaging Service) and set **A message comes in** to **Webhook, HTTP POST**. Use the address shown in the numbered list on the Settings → VisionScaper page. It ends in `crm/twilio`. See "Incoming message webhook addresses".
8. Go to **Settings → VisionScaper Messaging**. Under **Texts**, make sure **Text service** is set to **Twilio**.

What this gives you

- Customers' replies are logged in the Contractor Hub and emailed to the contractor. The settings page says texts from unknown numbers become leads.
- STOP replies are honored.
- Delivery receipts are requested automatically. You do not set anything up for that.

Tips

- Use a Messaging Service if you plan to send many texts. It is optional.
- If you want a backup, Settings → VisionScaper Messaging has the checkbox **If it fails, try the other one**. It needs Telnyx set up too.
- Keep your Auth Token private. Do not paste it into emails or chats.

If something goes wrong

- Texts do not send: check that Account SID, Auth Token and either a phone number or Messaging Service SID are all filled in. VisionScaper treats Twilio as ready only when those are present.
- Texts are accepted but never arrive: this is usually missing A2P 10DLC approval. Check Twilio's Console.
- Replies do not show up: the "A message comes in" webhook is missing or has the wrong address.

Set up Telnyx for texting

Switch the site to Telnyx for texts, paste your Telnyx details, and add the webhook address.

Telnyx is the second text service VisionScaper supports. Use it instead of Twilio, or as a backup. This is a site administrator task.

Before you start

- Create a Telnyx account, get a sending number, and create a messaging profile. Follow Telnyx's current instructions for each of these.
- Have your Telnyx API key ready.
- US texting still needs carrier registration. See "Get ready to text (A2P 10DLC)".

Steps

1. In WordPress, go to **Settings → VisionScaper Messaging**.
2. Under **Texts**, set **Text service** to **Telnyx**.
3. Fill in these boxes: - **Telnyx key**: your API key. - **Telnyx webhook secret**: a secret you choose. VisionScaper uses it to check that incoming webhooks are real. - **Telnyx sending number**: the number texts come from. - **Telnyx messaging profile**: your profile.
4. Copy the **Webhook address** shown on the same page. In your Telnyx account, add it as the place Telnyx sends message events and incoming texts. Follow Telnyx's current instructions for where that setting is.
5. Click **Save**.

Boxes for keys show "saved – leave blank to keep" once filled. Leave them empty when you save other settings and the saved value stays.

Use both services

Tick **If it fails, try the other one**. If the chosen service cannot send a text, VisionScaper tries the other service, as long as it is set up too. For Twilio to be the backup, fill in the Twilio boxes in Settings → VisionScaper.

Tips

- VisionScaper checks incoming webhooks with a signature header, `x-telnyx-signature`, which is a SHA-256 HMAC of the message body made with your webhook secret. The code notes this is a generic check and that each provider's own signature scheme is not implemented. If Telnyx does not send a header like this, incoming events may be rejected. This has not been verified against live Telnyx traffic.
- Telnyx is ready for VisionScaper only when both **Telnyx key** and **Telnyx sending number** are filled in.

If something goes wrong

- Delivery status never updates: the webhook address or secret is missing or wrong.
- Texts do not send: check the key and sending number, then try a test text from a conversation.
- You see a 403 "Bad signature" in provider logs: the secret in VisionScaper does not match what the provider signs with.

Set up your email service

Choose Postmark, Resend, SendGrid, Amazon SES or the site's own mail, and fill in the right boxes.

VisionScaper can send email through five services. The site administrator picks one for the whole site.

Service	Where you set it
Postmark	Settings → VisionScaper Marketing
This website's own mail	Settings → VisionScaper Marketing
Resend, SendGrid, Amazon SES	Settings → VisionScaper Messaging

The Marketing page recommends Postmark. The site's own mail suits testing and small lists, because it has no bounce handling and many mailboxes limit daily sending.

Steps for Postmark

1. Create a Postmark server and a **Broadcast** message stream. Follow Postmark's current instructions.
2. Go to **Settings → VisionScaper Marketing**.
3. Under **Email service**, select **Postmark**.
4. Paste **Postmark Server API token**.
5. Enter **Broadcast stream ID** (usually `broadcast`). In Postmark, choose to manage unsubscribes yourself. VisionScaper adds its own unsubscribe link and the one-click unsubscribe header.
6. Enter **Send from address**. It must be a verified sender or domain in Postmark. Add the DKIM and Return-Path records, and publish a DMARC record.
7. Set **Sender name**. Use `{company_name}` to show each contractor's business name, for example "{company_name} via VisionScaper".
8. Copy the **Postmark webhook** address shown on the page. In Postmark, add it as a webhook on your Broadcast stream and tick **Delivery, Bounce, Spam Complaint** and **Subscription Change**.
9. Click **Save**, or **Save & send me a test email**.

Steps for Resend, SendGrid or Amazon SES

1. Create the account and verify your sending domain with that service.
2. Go to **Settings → VisionScaper Messaging**. Under **Email**, set **Email service** to Resend, SendGrid or Amazon SES. The first option, **Use the one in Marketing settings**, hands the choice back to the Marketing page.
3. Fill in the boxes for your service: - Resend: **Resend key**, **Resend webhook secret**. - SendGrid: **SendGrid key**, **SendGrid webhook secret**. - Amazon SES: **Amazon access key**, **Amazon secret key**, **Amazon webhook secret**, **Amazon region (like us-east-1)**.
4. Click **Save**.
5. Add each service's webhook as described in "Incoming message webhook addresses".

Make sure sending runs on time

The Marketing page warns when scheduled sending is not running regularly. WordPress only runs scheduled jobs when someone visits the site. Ask your host to run a real cron job every 5 minutes, and add `define( 'DISABLE_WP_CRON', true );` to wp-config.php.

Tips

- Run the **Email sender check** after you set the sender. See "Check your email sender (SPF, DKIM, DMARC)".
- **Messages per 5-minute run** on the Marketing page limits how much goes out each run for all contractors together. Big campaigns go out over several runs.

If something goes wrong

- Marketing emails wait: if the site requires the email check, the sender must pass it first.
- Bounces are not recorded: the webhook is not added at the provider.
- Test email does not arrive: check the Send from address is verified with your provider.

Get ready to text (A2P 10DLC)

Fill in the three-step form so your business can be approved to send texts.

In the US, mobile carriers want to know who is sending business texts. VisionScaper has a short form for this, called **Get ready to text**. It takes about five minutes.

Before you start

Have these ready:

- The legal name of your business.
- Your 9-digit tax ID (EIN), like 12-3456789.
- Your website address, starting with https://.
- Your business street address.
- An email address the carriers can reach.

Steps

1. Go to **Marketing → Safety** and find 📶 **Get ready to text**. The status shows **Not sent yet**.
2. Click **Start** (or **Continue** if you already began).
3. **Step 1 of 3: Your business.** Enter **Legal business name**, **Tax ID (EIN)**, **Website**, the address, and the contact email. Click **Next**.
4. **Step 2 of 3: Your texts.** Choose **What will you text about?**: - Updates about visits, quotes and invoices - Updates and offers - Offers and promotions
5. Under **How do customers say yes to texts?**, write one or two sentences (at least 30 characters). For example, say customers tick a box on your request form or sign a quote.
6. Write a **sample text** (at least 20 characters). It must include "Reply STOP to opt out."
7. **Step 3 of 3: Review and send.** Check everything and click **Send to the carriers**.

Your EIN is shown with only the last four digits afterwards.

What happens next

The status changes to **With the carriers**. The page says carriers usually answer in a few days.

Important: the code states the carrier registration API is not connected. VisionScaper records your details, and the site administrator records the answer in **Settings → VisionScaper Messaging**, under **Businesses waiting for text approval**, by choosing **Approved by carriers** or **Rejected** (with a reason). The administrator should still register with the text provider (for example in Twilio's Console) using the provider's own process.

When the answer is recorded, your status shows **Approved**, or **Needs changes** with the reason. After **Needs changes**, click **Fix and send again**.

Tips

- If the site turns on "Only let a business text after its 'Get ready to text' details are approved", texting stays off until you are Approved. Without it, doing the form now still avoids blocked texts later.
- Keep your sample text honest and close to what you really send.

If something goes wrong

- A red message under a field tells you what to fix, for example "Enter the 9-digit tax ID (EIN)".
- Held texts show "Texting isn't approved yet (finish "Get ready to text" in Marketing → Safety)".

Incoming message webhook addresses

Every webhook address VisionScaper gives your text and email services, and where to find each one.

A webhook is an address VisionScaper listens on. Your text or email service calls it when a customer replies, a message is delivered, or an email bounces. This is a technical article for the site administrator.

All addresses start with your site's REST address (your site URL plus `/wp-json/`). The code uses the namespace `dreamscaper/v1`.

The addresses

Service	Address ends with	Where VisionScaper shows it
Twilio texts	`dreamscaper/v1/crm/twilio`	Settings → VisionScaper, numbered Twilio list
Telnyx texts and events	`dreamscaper/v1/msg/webhook/telnyx`	Settings → VisionScaper Messaging, **Webhook address**
Postmark email events	shown on the page as **Postmark webhook**	Settings → VisionScaper Marketing
Resend, SendGrid, Amazon SES	`dreamscaper/v1/msg/webhook/resend`, `/sendgrid`, `/ses`	Built from the same pattern (the Messaging page lists only the Telnyx one)
Twilio missed-call voice	`dreamscaper/v1/crm/voice`	Settings → VisionScaper Marketing, Missed-call text-back
AI Receptionist voice engines	`dreamscaper/v1/receptionist/webhook/ENGINE`	Settings → VisionScaper AI Receptionist
AI Receptionist phone number	`dreamscaper/v1/receptionist/voice`	Settings → VisionScaper AI Receptionist

For the receptionist, ENGINE is `retell`, `vapi` or `bland`. Postcards have their own address, shown in Grow → Postcards → Settings.

Steps

1. Copy the address from the screen listed above. Do not type it by hand.
2. Paste it into your provider's webhook setting. Follow the provider's current instructions for where that is.
3. Choose the events to send. For Postmark, tick **Delivery, Bounce, Spam Complaint** and **Subscription Change**.
4. Where VisionScaper asks for a webhook secret, enter the same secret on both sides.

How the checks work

- Twilio requests are checked with Twilio's signature using your Auth Token.
- The `msg/webhook` addresses check a header `x-ENGINE-signature` (for example `x-telnyx-signature`). The value must be the hex SHA-256 HMAC of the raw request body, made with the saved webhook secret. A missing secret or header always fails with "Bad signature." The source says this is a generic stand-in and each provider's own scheme is not implemented. Not verified against live provider traffic.
- Each event is saved once. A repeated delivery is acknowledged and ignored, so nothing is counted twice.

What the events do

- **delivered**: the message shows as delivered.
- **failed**: shows "The carrier couldn't deliver it".
- **bounced**: the customer's email is marked bounced.
- **complained** or **unsubscribed**: the customer is opted out of email.
- **inbound** text: logged on the customer, you get an alert "Text from (name)", and the reply rules run.

If something goes wrong

- 403 "Bad signature": the secret or header is wrong.
- Nothing arrives: your site must be reachable from the internet. A site behind a password or firewall will not receive webhooks.

Check your email sender (SPF, DKIM, DMARC)

Run the sender check in Marketing → Safety and fix any of the three DNS records it says are missing.

Inboxes trust email that proves who sent it. VisionScaper checks three DNS records on your sending domain and tells you what is missing.

Before you start

- The site administrator must have set a **Send from address** in Settings → VisionScaper Marketing. The check uses the part after the @ sign as the domain. If none is set, you see "No sender email is set up yet. The site administrator sets it in Settings → VisionScaper Marketing."
- You need access to your domain's DNS settings (often at your domain registrar or host).

Steps

1. Go to **Marketing → Safety** and find ✉️ **Email sender check**.
2. Click **Check my sender** (it says **Check again** after the first run).
3. Read the three rows. A ✅ means found, a ❌ means missing: - **SPF**: says which servers may send for your domain. - **DKIM**: a signature that proves the email was not changed. - **DMARC**: tells inboxes what to do with fakes.
4. For each ❌, read the line of advice below it and add the record in your DNS: - SPF: a TXT record on your domain that starts with `v=spf1`. Your email service shows the exact value. - DKIM: the record your email service gave you, a TXT or CNAME record under `_domainkey`. - DMARC: a TXT record on `_dmarc.yourdomain.com` with a value like `v=DMARC1; p=none; rua=mailto:you@yourdomain.com`.
5. DNS changes can take time to spread. Click **Check again** later.

The result and time are saved, and the check is written to your record (Marketing → Safety → Your record).

How the check looks for DKIM

VisionScaper looks for a DKIM record under these common names on your domain: `resend._domainkey`, `s1._domainkey`, `s2._domainkey`, `pm._domainkey`, `selector1._domainkey`, `selector2._domainkey`, `google._domainkey`, `default._domainkey`, `mail._domainkey` and `k1._domainkey`. If your provider uses a different name, the check can show DKIM as missing even when it is set up. This is a limit of the check.

Why it matters

If the site administrator turns on "Only let a business send marketing email after the sender passes the email check", your marketing email waits until all three pass. The Safety card says "Marketing email waits until all three pass." The message in a held send reads "Email sending hasn't passed its check yet (Marketing → Safety)".

Tips

- Start with **p=none** for DMARC if you are unsure. Follow your email provider's current advice for a stricter policy.
- Run the check again after you change email services.

If something goes wrong

- Everything shows ❌ but you know the records exist: wait for DNS to update, then check again. Also confirm the Send from address uses the domain you set up.
- Your own sender is not the site's sender: the check is for the site's shared sender, not a personal address.

Site-wide safety switches and monthly limits

The administrator's kill switch, approval rules, redaction, retention and monthly caps in VisionScaper Messaging.

The **Safety** section of **Settings → VisionScaper Messaging** controls rules for every business on the site. Only a site administrator can see it.

Steps

1. In WordPress, go to **Settings → VisionScaper Messaging**.
2. Scroll to **Safety**. These checkboxes are available: - **Stop all texts and emails on this site (kill switch)**. Nothing sends while it is on. Businesses see a banner "Messaging is switched off for this whole site". - **Only let a business text after its "Get ready to text" details are approved**. - **Only let a business send marketing email after the sender passes the email check**. - **Hide phone numbers and email addresses inside saved messages** (redaction).
3. Set **Keep conversations for (days, 0 = forever)**. The code default is 90 days. Old conversations are deleted on a schedule.
4. Set **Most texts per business per month (0 = no limit)**.
5. Set **Most emails per business per month (0 = no limit)**.
6. Click **Save**.

What each setting does

Setting	Effect on a business
Kill switch	Every send is blocked with "Messaging is switched off on this site"
Registration required	Texts are held until the business's status is Approved
Email check required	Marketing email is held until SPF, DKIM and DMARC pass
Redaction	Phone numbers and emails inside saved messages are hidden
Retention	Conversations older than this are removed
Monthly caps	When reached, sends stop with "The monthly limit for texts has been reached" (or emails)

A developer can also force the kill switch on in the site's code configuration. Ask your developer if you need that.

Approve text registrations

At the bottom of the page, **Businesses waiting for text approval** lists businesses that sent their "Get ready to text" form. For each one, pick **Approved by carriers** or **Rejected**. If rejecting, write a **Reason, if rejected**. The reason shows to the business. Click **Save**. Each decision is written to the audit record.

Prices

The **Prices (placeholders – set your own)** section holds cost per text or email, margin %, and message packs. These values are placeholders and not approved. See "Message usage, limits and extra packs".

Tips

- Use the kill switch if something goes wrong, such as a bad campaign. Turn it off again when fixed.
- Monthly caps count sent and delivered messages for the month. They are a site-wide ceiling, separate from each plan's allowance.

If something goes wrong

- A business says its texts are held: check whether registration is required and what its status is.
- Keys disappear after saving: a blank key box keeps the saved value, so this should not happen. Re-enter the key if it was never saved.

Use the Messages inbox

Read and answer conversations, filter by what needs a reply, and mute, archive or mark unread.

Messages is the one place for conversations. As a contractor, you see messages with customers about a project. Homeowners and members use it too. A badge in the header shows unread messages.

Steps

1. Open **Messages** (in the Contractor Hub it sits under Customers & Sales).
2. Use the filter chips at the top. As a contractor you see ⏳ **Needs reply**, **All**, **Unread** and **Archived**. Homeowners and members also get 🧰 **Contractors**, 🌎 **Members** and 📋 **Projects**.
3. Use **Search messages** to find a name or word.
4. Click a conversation to open it. Messages show newest at the bottom.
5. Type in **Write a message…**, add up to 5 photos, and send.
6. For other actions, open the ⋯ (Conversation options) menu: - 🔕 **Mute alerts** / 🔔 **Unmute** - 🗂️ **Archive** / 📥 **Unarchive** - ● **Mark unread**

An archived conversation comes back by itself when a new message arrives.

Project conversations

Conversations tied to a quote or request show a card at the top with the address, services, next appointment and quote. You do not need to ask "which job is this?". The card shows a state, such as:

- 🆕 New — needs a reply
- ⏳ Needs a reply
- ✔️ Waiting on customer
- 🗂️ Closed (it reopens if they write again)

Contractors also get quick actions on the card, such as **Ask for missing details**. This lets you tick what is missing, for example a photo of the gate, add a note, and send the request in one go. **View proposal** opens the quote.

Alerts

Open the alerts options (**Message alerts**) to turn on **Email me when someone sends me a message**. To stop alerts from one conversation, open it and choose ⋯ → Mute alerts.

Plans

"Needs-reply tracking and quick replies are in the Pro plan — you can still read and reply to everything." Which plan holds these is a placeholder, not approved.

Tips

- Work the **Needs reply** chip first. It shows customers who wrote last, oldest wait first.
- If you see "You can't message this member," you cannot start a conversation with that member. The exact reason is not shown in the code that was checked.

If something goes wrong

- A message does not send: check your connection and try again. Photos need to be images.
- You never get email alerts: confirm the alert box is ticked and check spam.

Two-way text conversations

Answer customer texts in Marketing → Conversations, add notes, assign a thread and send a weather delay notice.

Marketing → 💬 Conversations is your text inbox. Replies from customers land here, and so do the texts you send.

Steps

1. Go to **Marketing → Conversations**.
2. Pick a filter: **All**, **Unread**, **Needs a person** or **Mine**. Use **Search name or number** to find someone.
3. Click a conversation. Each message shows who wrote it (you, a team member, or an automatic helper), the time, and "website chat" if it came from your chat box.
4. Type in the box under the thread and click **Send text**. Below the box VisionScaper counts characters and how many texts it will be. Special characters make each text shorter.
5. Use the buttons under the box: - 💬 **Saved replies**: pick a saved reply to drop in. Under **New saved reply**, give it a **Name** and **Text** and click **Save reply**. - 📝 **Private note**: only your team sees it. It is never sent. - 🙋 **Assign to me** / ↩️ **Unassign**.
6. Use **Do not contact…** to mark someone do-not-contact, or **Delete this conversation**.

Badges you will see

- **N new**: unread messages.
- 🙋 **Needs a person**: a customer asked for a person, or an urgent word was found.
- **→ name**: assigned to a team member.

If a text cannot be sent

The box is disabled and a yellow note gives the reason, for example texting is not approved yet or the person opted out. If a **website chat** is open with this customer, the box says **Reply in chat** and your answer goes into the chat.

Weather delay notice

At the bottom, 🌧️ **Weather delay notice…** texts everyone booked on one day.

1. Pick the **Day**.
2. Write **What to say**.
3. Click **See who would get it**. You see the count and who is skipped and why.
4. Click **Send**.

Delete and do-not-contact

Delete this conversation removes all messages and notes with that customer for good. Their do-not-contact entry stays, because that is what keeps the promise not to message them. **Do not contact…** cancels waiting messages, and is recorded. To put someone back, you must confirm that they asked you to.

Tips

- Quiet hours apply to marketing and automated texts, but a reply to something a customer just sent is not held.
- Replies you send are logged on the customer.

If something goes wrong

- Nothing shows: no one has texted yet, or the Twilio or Telnyx webhook is not set. See "Incoming message webhook addresses".
- A customer says STOP and still shows: STOP is honored at once. Their thread stays so you keep the history.

Write quick replies

Save short answers once, then drop them into any conversation with one tap.

Quick replies are short answers you use again and again, like "I can come out on Thursday." You save them once and insert them in any conversation.

Steps

1. Go to **Settings → Quick replies** in the Contractor Hub.
2. You see a text box for each reply. Two examples are filled in the first time: - "Hi {customer_first_name}, thanks for the details! I can come out to look at the property on [day] between [time] — does that work for you?" - "Thanks {customer_first_name}! I'll have your quote ready within two business days."
3. Edit them, or click **+ Add a quick reply** for a new box.
4. Use the trash icon to remove one.
5. Click **Save quick replies**. Empty boxes are dropped when you save.
6. In a conversation, tap ⚡ to drop a quick reply into your message.

Use customer details

Write `{customer_first_name}` where you want the customer's first name. It fills in automatically. Replace any `[day]` or `[time]` bracket by hand before you send. Brackets are not filled in for you.

Quick replies and saved replies

VisionScaper has two lists of short answers:

List	Where	Used in
Quick replies	Settings → Quick replies	The Messages inbox (⚡)
Saved replies	Marketing → Conversations → 💬 Saved replies	Text conversations

They are separate. Add each where you use it.

Plans

The screen shows a usage bar and a lock note if quick replies are not in your plan. Plan assignments are placeholders, not approved.

Tips

- Keep each reply under about 160 characters if it will go out as a text.
- Write replies that sound like you, then edit a word or two before you send.

If something goes wrong

- You do not see ⚡: it appears in conversations you can reply to, and quick replies need a Pro plan (placeholder).
- A reply saved blank: empty text is removed on save.

Edit message templates and alerts

Change the wording, channels and timing of every automatic customer message and alert to you.

Every automatic message VisionScaper sends is pre-written. You can rewrite any of them in your own words.

Steps

1. Go to **Settings → Messages & alerts**.
2. Messages are grouped. The groups include **Requests**, **Appointments**, **Jobs & payments**, **Messages**, 🔔 **Alerts to you**, **Field operations** and **Purchasing**. Examples: Request received (auto-reply), Appointment reminder, On our way, Job complete, Invoice sent, Invoice overdue nudge, Payment received (receipt), Review request, New quote request, Proposal viewed, Proposal signed.
3. Each row shows when it is sent and which channels are on (✉️ email, 💬 text, 🔔 in-app), or **Off**. Click a row to edit.
4. Tick **Send this message automatically** (for alerts: **Send me this alert**).
5. Under **Send by**, tick ✉️ **Email**, 💬 **Text** or 🔔 **In-app**.
6. Edit **Email subject**, **Email (and in-app) message** and **Text message (short version)**.
7. Watch the preview on the right. It uses sample details.
8. Click **Save**. Click 📨 **Send me a test** to receive it yourself. **Reset to the original** puts the first wording back.

Insert customer details

Open 🔖 **Insert a detail** and tap a chip to add it where you were typing. Use the search box to find one. Write "Hi {customer_first_name}" and Jane sees "Hi Jane". Add a fallback after a bar for when a detail is missing: `{customer_first_name|there}`.

Details include customer name and phone, appointment date and time, invoice amount and link, company name and the like. An unknown detail shows in red in the preview and is left out when sent. A warning lists it.

Text length

Under the text box you see the character count and about how many texts it will be. "The opt-out line is added automatically", which means "Reply STOP to opt out." is added for you.

Timing

Some messages show a ⏱️ **Timing** box, for example review requests: **Days after the job is marked done**. Invoice nudges use **Days after the due date**, **Then every (days)** and **At most (times)**. Click **Save timing**. Appointment reminders are timed in **Settings → Reminders**.

Quiet hours for alerts to you

On a text alert to you, set 🌙 **Quiet hours for texts to you**: "No texts from … to …". Click **Save quiet hours**. The code default is 9 pm to 8 am.

Tips

- A **Customized** label marks messages you have changed.
- If texting is not set up, or not in your plan, a note says text versions are saved but not sent.
- Messages tied to a customer thread are also posted in your message thread with them.

If something goes wrong

- A test did not arrive: check the channels ticked and that your own email or phone is on your profile.
- Text is too long: shorten it so it is fewer texts.

Appointment reminders to customers

Set how long before each appointment customers get an email, text or in-app reminder, and what you get yourself.

Reminders go out before every appointment on the schedule you set. You can also set reminders for yourself.

Steps

1. Go to **Settings → Reminders**.
2. Under **Reminders to your customers**, you see ⏰ **Reminder 1**, ⏰ **Reminder 2** and so on.
3. Set **how long before** with a number and a unit.
4. Tick the channels: **Email**, **Text** (greyed if not in your plan or not set up) and **In-app**.
5. Choose **All appointment types** or **Only some appointment types**.
6. Click **+ Add a reminder** for another. **Remove** deletes one.
7. Under **Reminders to you**, do the same. Use **+ Add a reminder for me**.
8. Under **When you book, move or cancel**, tick **Tell the customer automatically** if you want. Their calendar updates either way.
9. Click **Save reminder schedule**. A message tells you how many reminders were planned for upcoming appointments.

Quiet hours for texts

Texts never go out between 9 pm and 8 am. "A reminder that would land overnight is sent at 8 pm the evening before instead."

Change the wording

The wording is in **Settings → Messages & alerts → Appointment reminder**. Customers can reply **C** to confirm or **R** to reschedule. VisionScaper answers confirm with a thank-you and reschedule with "We'll text or call you to find a new time." You are alerted: "Customer confirmed / asked to reschedule".

For one appointment

You can change the schedule for a single appointment when you book it. On the visit, a line shows what is planned, listing the planned reminders by channel and time.

Plan limit

If your plan caps reminders, the screen says "Your plan includes N reminder(s) per appointment." The value is a placeholder, not approved.

Tips

- Start with two reminders: one a day before and one a couple of hours before.
- Appointment reminders are service messages. They go to people who booked with you. Marketing texts have extra consent rules. See "Consent and opt-outs".

If something goes wrong

- No text reminder: texting may not be set up, not in your plan, or the person opted out.
- A reminder was early: it was moved to 8 pm the evening before because of quiet hours.

Consent and opt-outs

How consent, STOP, START, HELP and unsubscribes work, and why a stop on one channel is honored on all.

This is not legal advice. VisionScaper gives you tools and safe defaults, and you decide what is right for your business.

What needs consent

- **Marketing texts** (offers, seasonal reminders) need each customer's written OK: a signed form, your sign-up page, or texting YES.
- **Messages about their own request, estimate or job** do not need that.
- **Emails** can go to your customers until they unsubscribe. A setting can require email consent too (see "Marketing safety checks and sending limits").

Words customers can text

Customer texts	What happens
STOP, STOPALL, UNSUBSCRIBE, CANCEL, END, QUIT, OPTOUT, REVOKE	Marked do-not-contact. They get "You're opted out. You won't get more messages from us. Reply START to join again."
START, UNSTOP, SUBSCRIBE	Back on the list
HELP, INFO	Your business name, phone and "Reply STOP to opt out"
YES, Y, JOIN	Counts as agreeing, when you asked
Plain sentences like "stop texting me" or "remove me"	Treated as an opt-out

What an opt-out does

- Waiting marketing messages are cancelled.
- Active automations for them stop.
- Calls from the AI Receptionist stop too. One do-not-contact list is shared by messaging and the Receptionist.
- A stop on any channel is honored on all of them. The opt-out is written to your record.
- An email unsubscribe ends email. A text STOP ends all marketing.

Where to see it

Marketing → 👥 Consent shows each customer with chips such as ✅ texts OK, 🚫 STOP, 📪 Unsubscribed and ⚠️ Bounced. Filter by these. **Proof of consent** shows the wording, date and who recorded it.

Get permission to text

On the Consent tab, 📲 **Get permission to text** shows a sign-up link. Click 📋 **Copy** and put it on your website, invoices and group posts. To ask existing customers, tick those with no text consent and click 💬 **Ask selected by text**. Each person gets one text asking if they want seasonal reminders and offers (reply YES). Each person is only asked once.

Do not contact

In a conversation, click **Do not contact…** and **Stop all messages to them**. You can add a note.

Tips

- Never use a purchased or borrowed list. VisionScaper refuses it.
- Keep proof. It is your protection if anyone asks.

If something goes wrong

- A customer says they never agreed: open Proof of consent and read the record.
- A customer was put back by mistake: use the do-not-contact sheet. Taking someone off the list asks you to confirm that they asked you to.

Record consent you already have

Save proof that a customer agreed to texts or emails, for one person or a pasted list.

Someone said yes on the phone, in person or on a form? Write it down with the date and wording. You can prove it later.

> Warning: consent can't come from a list you bought or got from someone else.

One customer

1. Go to **Marketing → 👥 Consent**.
2. Click ➕ **Record consent for one customer**.
3. Type a name, phone or email in **Customer** and pick the person.
4. Under **What they agreed to**, tick **Texts** and/or **Emails**. A channel is greyed out if the customer has no number or address on file.
5. Pick **How they agreed**: Agreed on a phone call, Signed quote or contract, Paper form, Website sign-up form, Replied YES / START by text, Agreed in person, or Other (say how).
6. Edit **What they agreed to (the words)**. Write what the form said or what you told them. It is kept as proof.
7. Set **Date they agreed**. It cannot be in the future.
8. Optionally add **Proof (optional)**: PNG, JPG, WebP or PDF, up to 5 MB.
9. Click **Save consent**.

A list of customers

1. Click 📋 **Paste a list of customers**.
2. Put one person per line: phone, email or name, in any order. For example `Jane Smith, (860) 555-0123`.
3. A preview says how many lines have a phone or email. Paste 500 or fewer at a time.
4. Pick what they agreed to, how, the wording and the date. Everyone gets the same, so paste only people who agreed that way.
5. Tick **Add people who aren't customers yet** if needed.
6. Do not tick **This list was bought, rented or given to me by someone else**. If you do, it is refused.
7. Click **Save consent for this list**. Results show how many were saved and which lines were not found.

Withdraw consent

In **Proof of consent**, click **Withdraw** next to a record. The customer stops getting marketing for that channel. The record stays.

The checklist before a text campaign

Before your first marketing text campaign, you confirm a short checklist under **Before you text a list**. It is saved with the date and words. Reopen it under **Marketing → Safety → ✅ Before you text a list**.

Tips

- If a person texted STOP or unsubscribed before, they must opt in themselves. Recording consent does not override that.
- Everything you record appears in **Your record** on the Safety tab.

If something goes wrong

- "Choose how they agreed." appears: pick an option in How they agreed.
- A line is rejected: it needs a phone number or an email.

Automatic text replies and the AI notice

Set HELP, after-hours, keyword and urgent-word replies, and decide whether the AI says it is an AI.

Marketing → Safety → 🤖 Auto-replies decides what happens when a customer texts you. STOP is always honored at once. Replies from automatic helpers are labelled in the inbox.

Steps

1. Go to **Marketing → Safety** and find 🤖 **Auto-replies**.
2. **Answer HELP**: sends your business name, phone and "Reply STOP to opt out." On by default.
3. **After-hours reply**: sent once when someone texts while you are closed. Edit **What it says**. Use `{business}` for your name. Set **Open on** days and the hours **from** and **to**. Default: Monday to Friday, 8 to 5.
4. **Your own keywords**: click **+ Add a keyword**. When a customer texts exactly that word, they get your reply. STOP, HELP, START and YES can't be used.
5. **Words that mean "urgent"**: a text with one of these is flagged for a person. The customer is told to call 911 if anyone is in danger. Defaults: flood, fire, tree on the house, downed tree, gas leak, injury.
6. Click **Save auto-replies**.

Built-in answers

Customers can text these words and get an answer:

- **HOURS**: your hours.
- **QUOTE**, **ESTIMATE**, **PRICE**: "We'll text you shortly to set up a free visit and quote."
- **STATUS**, **WHEN**, **ETA**: their next visit, or an offer to set one up.
- **CALL ME**, **PERSON**, **HUMAN**: the customer gets "Thanks. Someone from the team will reach out soon."
- **C** or **R**: confirm or reschedule a visit.

Tell people it's an AI

Under 🪪 **Telling people it's an AI**, the switch **The AI assistant says it is an AI in its first reply** starts ON. To turn it off you must read a warning and tick a box to confirm you have checked the laws that apply to you. The confirmation is saved.

Whatever you choose, the assistant never pretends to be a person. If someone asks "are you a bot?", it says it is your business's AI assistant and offers a real person. This cannot be switched off.

Missed-call text-back

If the site administrator has assigned you a VisionScaper phone number, you can turn on **Text back missed calls** in **Marketing → Settings → 📞 Missed-call text-back**. Enter **Ring this phone**, an optional **Greeting**, and tick **Take voicemails**. Calls ring your phone. If nobody answers, the caller can leave a voicemail and gets a text right away.

Tips

- Keep the after-hours reply short and honest about when you will answer.
- Add a keyword for your most common question, like PRICING or SERVICE AREA.

If something goes wrong

- A keyword never fires: it must match exactly, and cannot be a reserved word.
- No missed-call text-back: you need an assigned number, or the feature is not offered on this site.

A tour of the Marketing page

What each Marketing tab does, how to start the AI marketing assistant, and how to pause everything.

Marketing (under Marketing & Growth in the Contractor Hub) is your AI marketing assistant. It reads your leads, estimates, jobs, invoices and messages and finds who to contact, why, and on which channel. Then it writes the message.

Steps to start

1. Open **Marketing**. On first use you see 👋 **Meet your AI marketing assistant**.
2. Choose how much it does on its own: - ✋ **Ask me first**: every message waits for one tap in Approvals. New-lead replies and review requests still go right away. - 🤖 **Autopilot**: it sends within your rules (consent, at most one marketing message a week per customer, your sending hours).
3. Optionally paste your **Google review link** (from Google Business Profile → "Ask for reviews") and a **Booking link**.
4. Click 🚀 **Start my AI marketing assistant**.

You can change the mode later, per automation.

The tabs

Tab	What it is for
☀️ Today	Money made, approvals waiting, posts due, and every open opportunity
🤖 AI assistant	Ask it questions and get actions
✅ Approvals	Messages the assistant prepared, waiting for your OK
📣 Campaigns	Email and text campaigns
⚙️ Automations	Step-by-step flows, Autopilot or Ask me first
⭐ Reviews	Review requests and links
⏰ Reminders	Personal reminders and group-posting reminders
💬 Conversations	Two-way texts
📈 Results	From message to money
👥 Consent	Who agreed, opt-outs, proof
🛡️ Safety	Get ready to text, email check, sending rules, auto-replies
Settings	Controls, limits, hours, design of emails and texts

Use ↕️ **Arrange tabs** to reorder them. A number badge on Approvals counts messages waiting.

The Today tab

The top row shows booked work (90 days), money collected, response rate (30 days), open opportunities, and approvals waiting. Below, opportunities are grouped:

- New leads needing contact
- Missed leads and calls
- Estimates needing follow-up
- Lost estimates to win back
- Inactive customers
- Seasonal opportunities
- Recurring services due
- Upsell and cross-sell
- Review requests
- Referral opportunities

Each card gives the reason, a suggested channel and best time, and buttons: text or email them, ✨ **Let AI handle it**, or the ⋯ menu (snooze 3 days or 2 weeks, "I already handled it", dismiss, open customer). The list refreshes every few hours. **Check now** refreshes it.

Pause everything

Go to **Settings → Pause ALL marketing**. Campaigns, automations, review requests and AI replies wait. Essential messages (appointments, quotes, invoices) still send. You can set **Pause until (optional)** to a date. A banner on Today has a **Resume** button.

Plans

Without the full Marketing plan you see a basic version: opportunities, reviews, reminders and one-off messages. Which plan has what is a placeholder, not approved.

Tips

- Start in Ask me first mode. Move automations to Autopilot once you trust the wording.
- Use the **Finish setting up** card on Today for missing steps.

If something goes wrong

- Nothing on Today: you may have no leads yet. The assistant checks every few hours.
- Messages do not go out: marketing may be paused, or texts are held. See "Marketing safety checks and sending limits".

Create and send a campaign

Pick a template, choose who gets it, write the message, schedule it and approve it.

A campaign is one message sent to a group of customers. You can send by email, text, or both.

Steps

1. Go to **Marketing → 📣 Campaigns** and click **New campaign**.
2. Pick a starting point. Each template pre-writes the message and audience: - Seasonal service (pick the service first) - Seasonal newsletter - Last few openings - Win-back offer - Referral program - Maintenance plan - Thank-you / holiday note - Start from scratch
3. **1. Send by.** Choose ✉️ **Email**, 💬 **Text**, 🧠 **Text if allowed, else email** or **Both**.
4. **2. Who gets it.** Set the filters. A live line shows "N will get it of M matching", how many are reachable by email and text, and who is left out and why. See "Choose who gets a campaign".
5. **3. Message.** Write a **Subject** and **Preview text**. Build the email from blocks: heading, text, button, image, offer box, review quote, divider, space. Use ↑ ↓ to reorder. For texts, write the **Text message**. Use ✨ **AI writer** if you want three versions to pick from, with a tone of Friendly, Professional, Excited or Short & direct.
6. Optional: open 🎨 **Design for this campaign**. Your default design is in Marketing → Settings.
7. **4. When.** Choose **Right away**, **At a time**, **Each person's best time** or **Spread over days** (1 to 14).
8. Optional: 🧪 **Test two versions**. Version B has its own subject or text. Choose how much of your list is in the test (10 to 50%), the winner measure (**Clicked a link**, **Replied** or **Opened the email**), and the hours to wait before the winner goes to everyone else.
9. Check the preview, phone or desktop. A warning lists any detail that is empty for the sample customer. Add a fallback like `{customer_first_name|there}`.
10. Click **Send me a test**, then 💾 **Save draft** or ✅ **Approve & send**.
11. Confirm the box: "N customers · channel · when. Your frequency limit, sending hours and opt-outs still apply."

Before your first text campaign you confirm a short checklist ("Before you text a list").

After sending

Open a sent campaign to see Sent, Opened, Clicked, Replied, Estimates, Booked and Collected. You can **Pause**, **Resume**, **Cancel the rest**, **Duplicate**, or **Remove from list**. Statuses are Draft, AI draft — needs your OK, Scheduled, Sending, Sent, Paused, Cancelled.

Unsubscribe

Every marketing email includes an unsubscribe link. The page offers **Unsubscribe from emails** or **Stop all marketing (email & texts)**. Your signature and the footer are added automatically.

Tips

- Start small. Send a test to yourself first.
- Use an offer only if you mean it. Add saved offers in Settings; the AI only uses offers you wrote.

If something goes wrong

- "Nobody in this audience can be reached yet — widen the filters or pick another channel."
- Texts are held for a reason shown in the campaign. Common reasons: no consent, quiet hours, a daily limit.

Choose who gets a campaign

Use stage, services, last job, spend, towns and tags to build an audience, and read why people are left out.

In the campaign editor, **2. Who gets it** builds the list live. You never need to export or paste a list.

Steps

1. Under **Customer stage**, tap chips: potential customers, **Prospects**, **Customers**, **Past customers**, **Lost**. None picked means everyone.
2. Under **Had any of these services**, tap the services you want, for example fall cleanup.
3. Open **More filters (last job, spend, town, tags…)** for: - **Never had these services** - **No work in the last … days** - **Worked with you in the last … days** - **Spent at least** - **Skip anyone messaged in the last … days** - **Towns** (comma separated, e.g. Avon, Simsbury) - **Has any tag** and **Has none of these tags** - Open estimate: **Doesn't matter**, **Has an open estimate**, **No open estimate** - Rating: **Any**, **4★ or better**, **5★ only**
4. Read the live line: "N will get it of M matching · X reachable by email · Y by text."
5. If some people are left out, read "Not included:". It lists how many and why, such as no consent, opted out, or no number.

How it is counted

The count shows reachable people for the channel you picked. For example, a text needs a phone number and the customer's consent. The exact rules are applied by VisionScaper, and the "Not included" line shows the reasons.

Template audiences

Each template starts with a sensible audience:

Template	Starts with
Seasonal service	Customers and past customers who had that service
Win-back offer	Prospects and lost estimates with no open estimate
Referral program	Customers who rated you 4 or more
Maintenance plan	Customers without maintenance or mowing
Last few openings	Customers whose last job was within about two years

You can change any filter.

Tips

- Use **Skip anyone messaged in the last … days** so no one hears from you too often.
- To collect more text consent first, see "Consent and opt-outs".

If something goes wrong

- The count is 0: loosen a filter, or switch to **Text if allowed, else email**.
- Someone you expected is missing: check Marketing → Consent for their status.

Automations: follow-ups that run themselves

Turn on step-by-step flows, choose Autopilot or Ask me first, and edit the wording of each message.

An automation watches for a moment, like a new lead or a viewed estimate, and runs its steps. Every one stops by itself when the customer replies or books.

Steps

1. Go to **Marketing → ⚙️ Automations**.
2. For each flow, use the switch at the top to turn it on or off.
3. Choose 🤖 **Autopilot** (sends on its own) or ✋ **Ask me first** (each message waits in Approvals). Use 🤖 **All on Autopilot** or ✋ **Ask me first for all** to change them together.
4. Read each step: "1. name ... right away", then "after N days". Change the wait in days, pick **Best channel**, 💬 **Text** or ✉️ **Email**, and untick a step to skip it.
5. Click ✏️ **Edit wording** to change the subject, email and text. Details in braces fill in for each customer. `{customer_first_name|there}` means "there" if the name is missing. **Back to the default** resets it. Click **Save wording**.

The flows

Flow	Starts when
New leads — instant reply & follow-up	A new lead comes in from your website, VisionScaper, a text or a missed call, and nobody has contacted them
Missed leads — re-engage	A lead has gone 2+ days with no reply or quote
Estimate follow-up	A proposal was sent 2+ days ago, or viewed, and is not signed
Win back lost & expired estimates	A proposal expired or was declined 1 to 12 months ago
Review requests	A job is done, an invoice is paid, or every few maintenance visits
Ask happy customers for referrals	2 weeks to 6 months after a job, for 4–5 star customers or repeat customers
Reactivate inactive customers	No work in the "inactive after" period (12 months unless you change it)
Seasonal service reminders	A service's season opens (for example spring cleanups in March), for last year's customers
Recurring service reminders	A repeating service is due again
Upsells & cross-sells	One service naturally leads to another (patio to lighting, planting to mulch)

Each flow card also shows how many are in progress, how many were sent in 90 days, the response rate and bookings.

Stops

A line reads "Stops when:". For example, estimate follow-up stops when the proposal is signed or declined, or the customer replies.

Other settings

Marketing → Settings → What can go out has a switch per automation too, plus **Email marketing**, **Text marketing** and **AI writes and personalizes messages**.

Tips

- Marketing steps need consent for texts and count toward your weekly limit. A step about the customer's own request does not.
- New-lead replies are the highest value. Keep that one on.

If something goes wrong

- A step did not send: check Approvals first. In Ask me first mode, anything not approved within 7 days is dropped.
- A flow is locked: automations other than reviews need the full Marketing plan.

The AI marketing assistant and Approvals

Ask the assistant questions, let it write messages, and approve what it prepares with one tap.

The assistant knows your customers, services, seasons and results. It answers with ready-to-run actions you approve with one tap. It never sends anything outside your rules.

Ask it a question

1. Go to **Marketing → 🤖 AI assistant**.
2. Type a question in the box, or tap a suggestion: "Who should I contact this week?", "Plan a campaign for the service that's in season now", "Which past customers haven't heard from me in a while?", "How did my marketing do in the last 90 days?", "Write a referral offer for my happiest customers", "What should I automate first?"
3. Click 🤖 **Ask**. Answers appear in cards with actions.

Approvals

Marketing → ✅ Approvals holds messages the assistant prepared. Approve sends them at their scheduled time. "Send now" skips the wait. Anything not approved within 7 days is dropped. Nothing goes out without your OK in Ask me first mode.

- ✓ **Approve all** approves everything.
- Each group (for example Estimate follow-up) has its own approve button.

AI settings

Under **Marketing → Settings → What can go out**:

- **AI writes and personalizes messages**.
- **AI replies to customers who answer**: **Off**, **Draft it for my OK**, or **Answer simple "yes / interested" replies itself**.

Guardrails

From the code:

- The AI uses the same text model as the rest of VisionScaper through the site's fal.ai key. If the site has no key, you see "AI writing isn't switched on for this site yet."
- It never invents prices, discounts, dates, guarantees or facts. It only uses offers you saved under Marketing → Settings → Saved offers.
- Merge details like `{customer_first_name}` are kept.
- Each business has a daily AI limit of 200 uses. After that: "That's a lot of AI writing today — it resets tomorrow."
- Texts from an AI helper never claim to be a person. See "Automatic text replies and the AI notice".

Tips

- Edit before you approve. Tone is easiest to fix in the preview.
- Use Draft it for my OK for replies until you trust it.

If something goes wrong

- "AI writing isn't switched on": the site owner must add the AI key in Settings → VisionScaper.
- Nothing in Approvals: all automations may be on Autopilot, or no messages are due.

Marketing safety checks, sending limits and usage

The checks every message passes, your sending limits and hours, and how to see usage and add extra message packs.

Every marketing message goes through one send queue. The rules are checked again at the moment of sending. A message that breaks a rule waits and goes out when it is allowed.

What VisionScaper checks

- Marketing is not paused, and the site kill switch is off.
- The person has not opted out (a text STOP ends all marketing; an email unsubscribe ends email).
- Texting is approved, if the site requires "Get ready to text".
- The sender passed the email check, if the site requires it.
- Consent exists for marketing texts (and email, if you turned that on).
- The site's monthly cap and your plan allowance are not used up.
- Your frequency limits, sending window and quiet hours.

When a message is held, the reason is in plain words, such as "They asked not to be contacted".

Set your limits

Go to **Marketing → Settings →** 🛡️ **Limits & sending hours**.

Setting	Code default
At most N marketing messages per customer per week	1
... per month	4
At least N hours between marketing messages to the same customer	48
Send at most N messages a day in total (0 = no limit)	200
Marketing goes out on (days)	Mon to Sat
Between (hours)	9 am to 7 pm
Never text customers between ... and ...	set to your quiet hours
A customer is "inactive" after N months	12
Credit a booked job to marketing sent within N days	30

A message that would break a limit waits until it is allowed. It is dropped after two weeks. 0 means no limit.

Texts: hours and state limits

Go to **Marketing → Safety →** 🕗 **Sending rules**.

1. Set **Texts go out between** two hours. The code default is 8 am to 9 pm. Hours are judged by where the customer lives, not where you are.
2. Set **At most N marketing texts per customer per day** (0 means no limit of your own).
3. Under **Limits by state**, you see the built-in one: Florida allows no more than 3 marketing texts in 24 hours. To add your own, type the two-letter state and a number, then click **Add a state limit**.
4. Tick **Require email consent too** if you want marketing email to go only to people whose email consent is on file. Off means email goes to customers until they unsubscribe.
5. Click **Save sending rules**.

A reply to something a customer just sent is not held by quiet hours.

Pause

Pause ALL marketing in Settings stops campaigns, automations, review requests and AI replies. Essential messages still send.

Usage and extra message packs

Your plan may include a number of marketing texts and emails each month. VisionScaper counts them.

1. Go to **Marketing → Safety →** 📊 **Usage and extra messages**.
2. Read the meters for **Texts** and **Emails**, such as "N used this month", with a bar. A plan with no limit reads "unlimited".
3. If packs are offered, **Need more?** appears. Click a pack to pay through the site's payment provider. The messages are added once, are "used after the ones in your plan, and don't expire."

Only marketing messages count toward the plan allowance. The meter counts sent, delivered and sending messages since the first of the month (UTC). If the site has not connected payments you see "Buying message packs isn't available yet. Ask the site administrator."

At the site's monthly cap, sends stop with "The monthly limit for texts has been reached" (or emails). The administrator sets caps, costs, margin and packs in Settings → VisionScaper Messaging. Those values (cost, margin, pack sizes and prices) are placeholders, not approved. Settings → VisionScaper Marketing → Costs & limits holds **Cost per text segment**, **Cost per email** (used for campaign ROI) and **Messages per 5-minute run**.

Tips

- Rules in code are starting points, not legal advice. Check the rules where your customers live.
- Raise limits slowly. More messages can mean more unsubscribes.

If something goes wrong

- A text sits "Waiting until morning where they live": the customer's time zone says it's outside your hours.
- "Already got 3 marketing texts in 24 hours (limit for FL)": a state or daily limit held it. It goes later.

Marketing results and group-posting reminders

See which messages led to booked jobs, and set reminders to post in Facebook and Nextdoor groups.

Results

Marketing → 📈 Results follows each message to the money.

1. Choose **30 days**, **90 days** or **12 months**.
2. Read **From message to money**: Messages, Responded, Estimates, Booked jobs, Collected, Gross profit.
3. See totals by Campaigns, Automations and Sent by you, and the response rate for Text and Email.
4. Under **What made money**, a table lists each campaign or automation with Sent, Responded, Estimates, Booked, Collected, Profit and Cost.
5. **Booked work by week** shows trends. **Group posts** shows posts and link clicks.

How credit works: a booked job counts for the last marketing message that customer got in the days before it. The default window is 30 days. Change it in Settings under "Credit a booked job to marketing sent within N days". Revenue is what has been paid. Gross profit uses each job's own cost estimate. Costs use the text and email costs set by the site administrator.

Group-posting reminders

Local Facebook groups and Nextdoor often allow business posts on certain days only. VisionScaper reminds you.

1. Go to **Marketing → ⏰ Reminders**.
2. Click 📣 **Add a group**.
3. Enter **Group name** and **Link to the group**, pick the platform (the list includes Facebook, Nextdoor, Instagram, Craigslist and other), and paste the group's rules in **Group rules (for your reference)**.
4. Under **Business posts allowed on**, pick the days and the time. Choose **Remind me**: **The morning of**, **The evening before** or **Both**, with times.
5. Set how many times a week you post and every how many weeks. Once you have posted the number allowed, the rest of that week is skipped.
6. Write **Your post**. Use `{link}` for a tracked link to your website, which counts clicks and the leads that come from the group. Use `{join_link}` for your text-list sign-up.
7. Add photos (up to 6, each under 6 MB). Add extra versions. They rotate so the group does not see the same post every week. ✨ **Write a fresh version with AI** adds one.
8. Under **Alert me by**, choose 🔔 **In the app**, ✉️ **Email** or 💬 **Text me**.
9. Click **Add group**.

On a post day, click 📋 **Copy post & open group**. VisionScaper copies the post and opens the group. VisionScaper does not post for you. Use **Pause** and **Resume** to stop a group for a while.

Personal reminders

Use the second button next to 📣 **Add a group** to add a personal reminder (exact label not checked). It is for things you must not forget: insurance renewals, weekly social posts, calling suppliers. Choose **Once**, **Daily**, **Weekly**, **Monthly**, **Yearly** or **Every N days**, with a time, an optional end date, and an early warning from 15 minutes to a week.

Tips

- Paste each group's rules in so you keep to them.
- Turn off "Reminders & group-posting alerts to me" in Settings → What can go out if you want no reminders.

If something goes wrong

- No reminder arrived: check the channel boxes and the group's allowed days.
- Link clicks show 0: the post must use the `{link}` placeholder.

Ask customers for reviews

Set your review links, when requests go out, and share a review link and QR code.

Reviews bring in new customers. VisionScaper asks customers to rate you first and then offers your review sites.

Set up your links

1. Go to **Marketing → ⭐ Reviews**.
2. Under ⭐ **Where reviews go**, fill in: - **Google**: Google Business Profile → Get more reviews → copy the link, or paste your Place ID. - **Facebook**: your page's reviews link. - **Another site** name and link, for example Houzz.
3. Click **Save links**. Use the **Test** buttons to open each.
4. Optionally tick **Also offer a VisionScaper review (with photos)**.

Every customer is offered these sites. The screen says hiding them from unhappy customers breaks Google's rules and the FTC's. Anyone with a problem can also tell you privately and you are alerted right away. Yelp isn't offered because it doesn't allow asking (per the screen).

When to ask

Under ⏱️ **When to ask**:

- **Review requests are on** (master switch).
- **When a job is marked Done**, **When the final invoice is paid**, and **During maintenance — after every N completed visits**.
- **Wait N days after the job before asking**. Default 2.
- **Send by**: Best channel, Text or Email.
- **One reminder if they don't answer, after N days**. Default 5.
- **Don't ask the same customer more than once every N days**. Default 180.
- **Alert me right away about ratings of 3★ or less**.

The wording is in Settings → Messages & alerts → Review request.

Ask anyone, any time

- Press ⭐ **Ask for a review** on any customer, finished job, paid invoice or appointment. Pick the channel and **Now** or **On my usual delay**. If they were asked recently, you can choose to send anyway.
- Under 💁 **Ask anyone, any time**, copy your public review link or open the QR code. Click the QR button to print it or download it as an SVG. Put the link on invoices, business cards and truck magnets.

Track what happens

The top of the tab counts **Asked**, **Opened**, **Rated** (with average stars), **Went to Google / Facebook**, **Private feedback** and **Scheduled**. **Recent** lists each request with its status.

Tips

- Happy customers go straight to your Google page.
- Reply to every review. See "Draft replies to reviews with AI".

If something goes wrong

- A request did not go: the customer may be opted out, have no contact info, or marketing is paused.
- No Google link: the setup card on Today suggests adding it.

Draft replies to reviews with AI

Paste a review, let the AI draft a reply in your voice, edit and approve it, then paste it on the review site yourself.

Grow → Review replies helps you answer reviews. VisionScaper never posts a reply for you. It has no connection to Google, Facebook or Yelp for that. You approve the words, copy them, and paste them on the review site.

Steps

1. Open **Review replies**.
2. Click **Add a review**. Fill in: - **Where was it left?**: Google, Facebook, Yelp or Other site. - **Stars**: 1 to 5. - **Reviewer's first name**: only the first name is used. Emails, phone numbers and links are removed before the AI sees the review. - **The review**: paste the text (up to 2000 characters).
3. Click **Add review**.
4. Click **Write a reply**. The AI drafts one.
5. Edit the text in **Your reply**. Click **Write another version** for a new draft, or **Save my edits**.
6. Click **Approve these words**.
7. Click **Copy reply**.
8. Click **Open (site) to paste it** and paste the reply on the review site.

Statuses: No reply yet, Draft - needs your approval, Approved - ready to copy, Copied - paste it on the review site, Archived.

Private feedback

If customers sent private feedback through your review requests, a box shows how many. Click to bring them in and write a reply you send yourself.

Rules the AI follows

- Thanks for good reviews. For 3 stars or fewer: empathy and "let's talk offline".
- It never argues with the reviewer.
- It never promises a refund, discount, free work, fix or credit.
- It never invents job details, dates, prices or names.
- No personal data beyond the first name.

If the draft breaks a rule, VisionScaper fixes it and tells you, for example "We took out a sentence that promised money, a discount or a fix." If the AI's wording isn't usable, you get a short safe reply to edit.

Credits

"Each draft uses 1 AI credit from your monthly credits (placeholder, not approved)." Retrying a failed draft does not charge twice, and a failed draft gives the credit back. The screen shows your credits used this month.

Tips

- Reply within a day or two, and keep it short.
- Archive replies you are done with. **Bring back** restores them.

If something goes wrong

- The **Write a reply** button is off: "The AI writer isn't switched on for this site yet." You can still type your own reply and approve it, but ask the site owner to add the AI key.
- Copy fails: select the text and copy it yourself.

Send postcards with tracked QR codes

Pick who gets a postcard, choose a seasonal design, approve the cost, and watch QR scans and delivery.

Grow → Postcards sends a printed postcard to a list of your customers. Nothing is ordered until you approve a stated total, and then it waits out a cancel window.

Before you start

You need your own account with the print-and-mail company. VisionScaper speaks the Lob service. The company bills your account directly, and the account needs money in it. Follow the company's current instructions to sign up. The code notes that live printing was not tested, so start with a test key.

Set up once

1. Open **Postcards → Settings**.
2. Under **Return address**, fill in Name, Street, City, State (2 letters) and ZIP. It prints on the back and is required before you approve.
3. Under **Your print-and-mail account**, paste your **API key** and the **Security key from the print company**. They are stored scrambled and never shown again. A key starting with `test_` shows a Test mode banner and nothing is printed or mailed.
4. Copy the address shown and add it under "automatic updates" on your print company's website, so VisionScaper can see where each card is.
5. Under **Price and budget**, set **Price per card ($)** to what the company charges you. The default is a placeholder, not approved. Also set **Your margin (%)**, **Most for one order ($)**, **Most per month ($)** and **Cancel window (minutes)**.
6. Optionally set **Default QR code destination**. Empty sends people to your website's home page.
7. Click **Save settings**.

Make a postcard order

1. Open **New postcards**.
2. **1. Who gets a card.** Pick customer groups (such as current or past customers, or people who asked for a quote), **Only these towns** and **Last job at least this many days ago**. A line shows the estimate: "N × price (placeholder price)". It also shows who is skipped and why.
3. **2. The card.** Choose Spring cleanup, Summer lawn care or Fall cleanup. Edit the headline, line under it, three or four short points, an offer (only what you want to promise) and the call to action. You can use `{first_name}`, `{business}`, `{phone}` and `{town}`. Tick **Put a QR code on the back (each card has its own, so you can see scans)**. Set **Where the QR code goes**. Click **Refresh the preview** to see the front and back.
4. **3. Cost and approval.** Click **Continue to cost and approval**. Read the exact total, then click **Approve and start the cancel window**.
5. During the cancel window (default 60 minutes), you can click **Cancel this order**. After it, the cards go to the printer.

Who is left out

Customers on your **Do not mail list**, customers marked do-not-contact in Marketing, sample customers, incomplete or invalid addresses, and a second card to the same address. Postcards do not need text or email consent. A card that comes back undeliverable adds its customer to the skip list as "Mail came back". Fix the address, then send just that card again.

Track orders

Orders shows each order's status: Draft - not ordered, Approved - waiting out the cancel window, Sending, Sent to the printer, Finished, Cancelled, Stopped - needs attention. Each card shows Waiting, With the printer, Mailed, On its way, Delivered, Came back or Failed, plus its **scans**.

How the QR code works

Each card has its own short link of the form `yoursite/?dsq=code`. A scan is counted, then the visitor goes to your landing page. Codes are encoded on the server for up to 213 characters of link.

Tips

- The total is an estimate. The print company bills you directly.
- Use the same QR link idea on review cards. See "Ask customers for reviews".

If something goes wrong

- Approve is blocked: an order over **Most for one order**, or over **Most per month**, can't be approved.
- Status never updates: the automatic-updates address or security key is missing.

Bring in leads from Angi, Thumbtack and Google Local Services

Give each lead source a secret address or paste its email, and new requests land as customers without doubles.

Request sources (the screen at the Hub address `#/sales/lead-sources`; the exact menu group was not verified) collects leads from outside sources. Each one arrives tagged by source, without doubles, as a customer marked as a lead.

Be aware

- The layouts of the emails and data these readers expect are based on typical notification layouts. They have not been checked against live emails or live webhooks from Angi, Thumbtack or Google. If something important is missing, the lead is still saved and marked **Needs review**.
- VisionScaper does not read a mailbox for you. The plugin has no mailbox code. To forward automatically, use a mail-forwarding service that posts to your secret address.
- This is a plan feature (a placeholder, not approved). If it is not in your plan you see "This is not part of your plan."

Steps: secret address

1. Open **Request sources**. You see a card for each source (for example Angi, Thumbtack, Google Local Services).
2. Copy the **Secret address (keep it private)** with **Copy address**.
3. Give that address to your forwarding service, or to the source if it can send web requests. It accepts JSON, form posts or a raw email body.
4. Make a **new address** at any time with **Make a new address**. The old one stops working right away.
5. **Turn off** a source without deleting it.

Steps: paste an email

1. Scroll to the paste box. Pick the source.
2. Paste the whole request email or the forwarded text.
3. Click the preview to see what was read: Name, Phone, Email, Address, Service, Message. It also says if this looks like an existing customer.
4. Click **Add this request**.

Test first

Click **Test with a sample** on a source. It shows a sample email and what was read. **Nothing was added.**

What happens to a lead

- People are matched by email or phone to existing customers, never by name alone. A repeat lead updates the existing record. Statuses: Added, Matched an existing customer, Sent twice (counted once), Not added yet (plan limit), Could not be added.
- **Recent requests** lists each with its source badge. **Mark seen** and **Mark all seen** clear the "new" count. Click **Open customer** to continue. **Try again** retries a request held by a plan limit.
- Raw copies are trimmed and deleted after 90 days.

Tips

- Mark requests as seen so the new count stays useful.
- A lead that lands in your customers feeds the Marketing assistant's "New leads needing contact".

If something goes wrong

- Missing details: open the customer and fill in what the red note says is missing.
- Duplicate: if you see "You already added this email," it was counted once.

Set up the AI Receptionist

The administrator adds provider keys and webhooks; you then run the six-step setup and go live.

The AI Receptionist is a phone agent. It answers calls, collects the caller's details, books a visit and passes emergencies to a person. It can also make calling campaigns. Setup has two parts.

Part 1: the site administrator

Go to **Settings → VisionScaper AI Receptionist** in WordPress.

1. Copy the **webhook address** at the top: `…/receptionist/webhook/ENGINE`, where ENGINE is `retell`, `vapi` or `bland`. Give it to the voice service you use. Also copy the phone number's voice address (`…/receptionist/voice`).
2. Under **Keys**, fill in (a blank box keeps a saved value): - For **Retell AI**, **Vapi** or **Bland**: **API key**, **webhook secret** and **phone address (SIP)**. - **ElevenLabs key**, **Cartesia key**, **Deepgram key**, **Telnyx key**.
3. Under **Prices (placeholders – set your own)**: cost per minute per service (cents), **Margin on top (%)**, **Overage after plan and packs** (0 = stop instead), **Hard monthly limit per business ($; 0 = none)** and minute packs. All values are placeholders, not approved.
4. Minutes in each plan, and the AI Receptionist switch, are set on the VisionScaper Plans page.
5. Under **Privacy and safety**: **Keep transcripts and recording links for (days; 0 = forever)**, **Hide phone numbers and emails in saved transcripts**, and the **Kill switch** to stop all calling and campaigns at once.
6. Save.

The services: Retell AI is the default and the recommended engine. Vapi is for advanced setups. Bland is built for high-volume outbound calling. Voice layers: ElevenLabs (default), Cartesia, Deepgram. Phone carriers: Twilio (default) and Telnyx. The contractor screens show a voice-service choice. The engine and carrier use their defaults, and no screen to change them was found in the code that was checked (not verified).

Webhooks are checked: a SHA-256 HMAC of the body in the header `x-ENGINE-signature`, with your webhook secret. A missing secret or header always fails. The voice engines' own signature schemes have not been verified.

Part 2: you

Open **AI Receptionist** (under Marketing & Growth). Only owners and managers can. If the feature is not in your plan you see "The AI Receptionist isn't part of your plan."

The setup has six steps:

1. **Your business**: name, phone, state or region, country, time zone, hours each day, and **After hours** (assistant still answers, take a message only, or pass the call to my phone).
2. **Services, area and prices**: services you offer, where you work, towns, and price ranges it may mention. It never gives a binding price.
3. **Voice and name**: the assistant's name, a voice (Ava, Noah, Grace, Owen, Sofia, Mia or My own voice), **Voice service**, **Language**, **Accent**, speed and warmth. Click **Hear it** for a sample.
4. **What it says**: greeting (use `{business}`), personality, recording notice, the AI notice, and **Answers it can give** (questions and answers; it answers only from this list).
5. **What to collect and when to hand over**: fields to ask every caller, urgent words, and **Pass emergencies to a person right away** with the number to use.
6. **Test call and go live**: the number it answers (a Twilio number, or **Get me a number** by area code), who answers first (**The assistant answers right away** or **Ring my phone first, then the assistant**), then **Call me to test**. Click **Go live**.

The AI notice is on by default. Turning it off needs a confirmed warning. Whatever you choose, the assistant never claims to be a person.

Tips

- To keep your current business number, forward unanswered calls to the assistant's number, or port the number with your phone company. Porting is not done in VisionScaper.
- If the voice service is not connected, step 6 says "The voice service isn't connected yet." Ask the site administrator.

If something goes wrong

- "Get me a number" fails: it buys a number from your Twilio account. Check that it is set up.
- The assistant does not answer: check the **Turn it on** button; the pill should read "On: answering calls".

AI Receptionist calls, campaigns and minutes

Review calls, run calling campaigns safely, keep the do-not-call list, and watch your monthly minutes.

Once the assistant is live, open **AI Receptionist** to manage it. A pill shows "● On: answering calls" or "○ Paused". Use **Pause the assistant** and **Turn it on** to switch it.

Calls

The **Calls** tab lists every call. Click one to see:

- Who called, the time and length, and a summary.
- What the assistant collected (name, address, service and so on).
- A link to **Listen to the recording** and **Read what was said**.
- Buttons: **Call back**, **Open customer**, **Mark callback done**.

Badges show **Needs a callback**, **Emergency – call back** and **Visit booked**. The tab title shows how many callbacks wait.

Campaigns

Campaigns are outbound calls to a group, for a reason. The types are Past customers, Quotes awaiting an answer, Seasonal reactivation, Review requests, Appointment reminders, Gentle invoice reminders, and Custom.

1. Click **+ New campaign** and pick **Who to call**.
2. Edit the script with the detail buttons (first name, business, service, date, amount). An example shows below.
3. Pick a **Goal**: Book a visit, Connect them to me, or Ask whether they want to hear from us.
4. Set **When to call**: days and hours. These are always inside your own calling hours and judged by the time where the person is.
5. Set **Calls per hour at most**, **Calls at the same time**, **Tries per person after the first**, and a **Spending limit ($, 0 = none)**.
6. Optionally tick **Leave a short voicemail if nobody answers** and **Send one text after the last try** (only to people who agreed to texts).
7. Read "N of M people can be called". People are skipped for no permission on file, no number, or on the do-not-call list. If some lack permission, you can record it for those who really agreed. It is saved with the date, source and wording.
8. Click **Save campaign**, then **Review and start**. You must tick a confirmation. Only people with permission on file, not on the do-not-call list, and inside calling hours are called.

Use **Pause**, **Resume**, **Edit**, **Delete**, or **Pause all campaigns**. Stats show People, Dialed, Answered, Booked, Opted out and Cost.

Safety & records

On the **Safety & records** tab:

- Set "Don't call before" and "Don't call after" hours. The code default is 8 to 9 pm. This page helps keep records and is not legal advice.
- Tick **Also check the national do-not-call list** (needs a checking service; if there is none, nobody is called).
- Set **Most you want to spend each month ($, 0 = no limit)**.
- Manage the **Do-not-call list** and read the **Record of changes**.

The do-not-call list is shared with texting and email. A stop on one channel is honored on all.

Minutes

At the top you see "N of M minutes used this month", and money spent if any. When low, a message appears with **Add minutes**. That opens a checkout for a pack, which is used after your plan's minutes. If payments are not connected you see "Buying minutes isn't available yet." The plan minutes, pack sizes, prices, overage and hard limit are set by the administrator and the values in code are placeholders, not approved.

Tips

- Run **Call me to test** after changing the script.
- Check the Calls tab daily for callbacks.

If something goes wrong

- "You've used all your minutes": add a pack or wait for next month.

- A campaign calls nobody: check the audience line and the calling hours.

Add the website chat widget

Turn on a chat box for your site, set its look and hours, paste the snippet, and answer chats from your inbox.

Grow → Website chat gives you a chat box for your website. A visitor leaves a name and a way to reach them, and you answer from the Website chat screen or from your messages. It is a plan feature (a placeholder, not approved).

Steps

1. Open **Website chat**. It has three tabs: **Conversations**, **Look and hours**, **Put it on your site**.
2. In **Look and hours**: - Tick **Show the chat on my website**. A yellow banner "The chat is switched off" shows until you do. - Set **Button and window title** (default "Chat with us"), **Greeting**, **Side of the screen** (Bottom right or Bottom left) and **Colour**. Tick **Use my brand colour** or pick one. The preview updates. - Under **Business hours**, tick the open days and set **Open from** and **Until**. Outside these hours visitors see your **After-hours message**. - Optional: tick **Let the AI answer first, from my own answers only**. - Set **Delete chats after this many days** (7 to 730; the code default is 180).
3. Click **Save**.
4. In **Put it on your site**, choose how to add it: - **On another website**: click **Copy snippet** and paste it just before the closing `</body>` tag. Most site builders have a "custom code" or "footer" box. - **On this WordPress site**: put the shortcode shown on any page or in a widget. Or tick **Show the chat on every page of this site**, which only the site administrator can switch on.

The snippet is a small script with your key and your site's address. It uses no libraries and no cookies. It keeps the visitor's chat id in the browser's local storage so a page change does not lose the chat.

Consent line

Visitors see a consent line before they start, and must tick it. The text is shown on the Look and hours tab.

Answer chats

1. On **Conversations**, click a chat. The list refreshes every 15 seconds while open.
2. Type in **Reply to (name)** and click **Send reply**.
3. Use **Close this chat** (or **Reopen**) and **Delete this chat**. Deleting removes the messages, not the customer.
4. A chip **Wants a person** shows when a visitor asked for one.

Chats also appear in the Marketing conversations and your inbox as a "website chat" channel. Replies reach the visitor's page by polling, with no websockets.

The AI first reply

It answers from the questions and answers, services and service area you set in the AI Receptionist. It says it is your AI assistant if asked, never gives a price or promises a date, and hands the chat to you when it can't help. If the site has no AI key, nothing is answered by AI.

Spam and privacy

- A hidden trap field, per-address and per-visitor rate limits, a 1000-character limit, more than 2 links refused, and a signed visitor token that expires.
- The visitor's address is kept only as a short one-way hash. The plain IP, browser details and message text are not written to any log.
- Chats older than your retention setting are deleted daily.

If something goes wrong

- Nothing shows on the site: the chat is switched off, or the snippet is not before `</body>`.
- A visitor can't send: the message may be too long, have too many links, or they were rate limited.

Add social links and a work gallery

Show your Google, Facebook and other links, plus up to 60 finished-work photos, on your pages and proposals.

Social links and your best photos help homeowners trust you. Both are set in **Settings → Social & gallery**.

Social links

1. Open **Settings → Social & gallery**.
2. The tip suggests starting with **Google Business Profile**, since most local homeowners check reviews before they call.
3. For each network, paste the full link, or just your @name where it works. The networks are Google Business Profile, Facebook, Instagram, Houzz, YouTube, Nextdoor, TikTok and LinkedIn. Google, Nextdoor and LinkedIn need the full link from your browser's address bar.
4. Switch **Show** off for any link to hide it everywhere at once. It stays saved.
5. Click **Test** to open the saved link. Test opens the exact link homeowners get, so save first.
6. Check **How homeowners will see them**.
7. Click **Save social links**. A message says how many links are now on your pages.

A link is accepted only when it points to that network's own site. Errors show under the field. Links open in a new tab and carry no trackers. Every plan includes every network.

Where links show

They show on your contractor page, your Find a Contractor card, proposals and invoices. The directory card shows the first 3 switched-on links, in the order of the list. The page, proposals and invoices show all.

You can also show social links in your marketing email footer. Tick **Show my social links in the footer** under Marketing → Settings → Your emails & texts, your style.

Work gallery

1. In the **Work gallery** section, click **Add a photo**.
2. Choose a picture from your device or camera. The photo is resized to a maximum of 1800 pixels on the long side before it is saved.
3. To remove a photo, click the **×** on it.

Your finished work shows on your contractor page. You can add up to 60 photos. If the gallery is not in your plan, a lock note says so (plan assignments are placeholders, not approved).

Tips

- Use before-and-after shots and the best angle of each job.
- Don't include anything you don't have permission to show, like a customer's face.

If something goes wrong

- A link is rejected: it must be on that network's own website, and Google needs the full link.
- Add a photo fails: "Up to 60 photos", or the gallery is not in your plan.

Put the request form on your website and stop spam

Turn on the request form, embed it with a shortcode or one line, and use built-in spam traps and optional Turnstile.

The request form is a form customers fill in on your site. It creates a new lead, sends the customer an instant reply and alerts your office. It is OFF until you tick it.

Steps

1. Go to **Settings → Integrations** and find **Request form for your website**.
2. Tick **Turn the request form on**.
3. Under **Services offered**, tick the services (from your service templates) people can ask for.
4. Set **Photos allowed** (0 = none, up to 10).
5. Optional **Self-booking**: tick **Let visitors pick a time**. The Hub works out open times from crew hours, time off and booked visits. A pick stays a request until you confirm it. Set **Visit length (minutes)** (15 to 240) and who can be booked. **Confirm picked times automatically** is off by default and off is safer.
6. Click **Save**.

Put it on your website

You get three ways:

Way	What to do
Shortcode	Paste the shortcode shown on screen into a WordPress page
One line	Paste the single `<script>` line shown anywhere. It places a framed form that resizes itself
Link	Link to the form page shown. It is a plain page with no indexing

Copy the text exactly as the screen shows it.

What the form does

- It creates a new lead every time. It never merges with an existing customer by itself, and lists possible matches for your office.
- Retried submissions return the first result, so there are no duplicates.
- The consent box is NOT ticked for the visitor and is not marketing consent. The wording and time are stored so you can show what they agreed to. The line asks permission to text and/or email about this request and mentions STOP.

Spam protection

Always on:

- A hidden trap field (honeypot).
- A signed form token with a minimum and maximum age. Sending in under 3 seconds shows "That was very quick. Please wait a moment and send it again." A form open more than 4 hours asks to reload.
- A limit of 6 requests an hour per address.

Optional: **Cloudflare Turnstile**.

1. Create your own Cloudflare account and a Turnstile widget. Follow Cloudflare's current instructions. Cloudflare lists Turnstile as free (up to 20 widgets, unlimited challenges).
2. In **Spam protection**, tick **Use Cloudflare Turnstile**.
3. Paste the **Turnstile site key** and **Turnstile secret key**.
4. Click **Save**. Turning Turnstile on without both keys is refused.

Visitors' browsers contact Cloudflare when the form loads. Leave it off unless you see spam.

Tips

- Test the form yourself from a phone and check the alert and the reply.
- If real people are blocked, check the 6 per hour address limit (shared networks).

If something goes wrong

- The page returns a 404: the form is off. Turn it on.
- "Please reload the page and try again": the form token expired or is missing. Reload.

API keys & connections

Every key you paste in, plus the Connect-other-tools API and webhooks.

API keys and services checklist

A step-by-step checklist of every key, token and outside account VisionScaper can use, and the exact screen where each one goes.

VisionScaper works out of the box for basic design. Most extras need a key from an outside company. You only need the keys for the features you want. This checklist shows where each one goes.

Before you start

- You need a WordPress administrator login for the website where VisionScaper is installed.
- Use `https://` on your live site. Several providers refuse plain `http://` addresses.
- Provider screens change often. Follow each provider's current instructions to get a key. This manual only tells you where to paste it in VisionScaper.
- Prices and allowances shown inside VisionScaper settings are placeholders until you approve your own. Check each provider's current pricing yourself.

Steps

Open **WordPress admin → Settings → VisionScaper** for items 1 to 10.

1. **Basics.** Fill in Business name, Short name, Website and "Send designs and leads to".
2. **Google Maps API key** (optional). Gives Google address autocomplete and "Explore in 3D". See *Google Maps keys*.
3. **Google server key for the Route planner** (optional). See *Google Maps keys*.
4. **Google Client ID and Client secret** (optional). For "Sign in with Google". See *Google sign-in*.
5. **Facebook App ID and App secret** (optional). See *Facebook sign-in*.
6. **Black Forest Labs API key.** Needed for VisionScaper AI image tools. See *Black Forest Labs FLUX key*.
7. **fal.ai API key.** Needed for AI Smart Select, identify tools and several AI helpers. See *fal.ai key*.
8. **Pl@ntNet API key.** Plant and weed identification. See *Pl@ntNet key*.
9. **Stripe secret key and webhook signing secret.** Needed for selling credits and for contractor payments. See *Stripe setup*.
10. **Twilio Account SID, Auth Token, phone number.** Needed for texting. See *Twilio text setup*.

Then visit the other admin pages under **Settings**:

11. **VisionScaper Messaging.** Telnyx, Resend, SendGrid, Amazon SES keys. See *Telnyx text setup* and *Email providers*.
12. **VisionScaper Marketing.** Postmark token and stream. See *Email providers*.
13. **VisionScaper AI Receptionist.** Retell, Vapi, Bland, ElevenLabs, Cartesia, Deepgram keys. See *AI Receptionist provider keys*.
14. **Expo access token** (optional, back on the VisionScaper page). See *Expo access token*.

Contractors set these up themselves inside the Contractor Hub, under **Settings → Connected apps**:

15. **QuickBooks Online.** See *QuickBooks connect*.
16. **Xero.** See *Xero connect*.
17. **Google Contacts.** See *Google Contacts and calendar*.
18. **Zapier and API keys.** See *Connect other tools overview*.

Tips

- Secret boxes show dots after you save. Leave the dots to keep the saved value. Type a new value to replace it.
- Do one service at a time and test it before moving on.
- Keep a private list of which account each key belongs to, so you can revoke it later.
- Never paste a secret key into a page, an email or a chat.

If something goes wrong

- A feature still looks greyed out: it usually means its key is missing or was pasted with a space. Paste again.
- A signed-out visitor sees AI tools greyed out by design. AI features need a signed-in customer.
- Scheduled things such as reminders and syncs rely on WordPress cron. See *Cron, caching, SSL and REST troubleshooting*.

Google Maps keys (browser key and server key)

Which Google Maps keys VisionScaper can use, which Google APIs to enable, and how to restrict each key.

VisionScaper has two Google key boxes. Both are optional. Without them, address autocomplete uses OpenStreetMap and the Route planner estimates miles.

Before you start

- You need a Google Cloud account with billing set up. Check Google's current pricing and free allowances yourself.
- You need WordPress admin access.

Steps

A. The main key (called "Google Maps API key (optional)")

1. In Google Cloud, create a project and an API key. Follow Google's current instructions.
2. Enable **Places API (New)**. This powers Google address autocomplete.
3. Enable **Maps JavaScript API**. This powers *Explore in 3D*.
4. Restrict the key to your website's address (an HTTP referrer restriction), as the screen advises.
5. In WordPress, open **Settings → VisionScaper**.
6. Paste the key into **Google Maps API key (optional)** and press **Save Changes**.

B. The server key (called "Google server key for the Route planner (optional)")

1. Create a second key in Google Cloud.
2. Enable **Routes API** (driving distances) and **Places API (New)** (nearby restaurants and gas prices).
3. Restrict this key to your server's IP address. Your web host can tell you the address.
4. Paste it into **Google server key for the Route planner (optional)** and save.

If the server key box is empty, VisionScaper uses the main key for these server lookups.

What each key does in VisionScaper

Feature	Key used
Address autocomplete	Main key (falls back to OpenStreetMap)
Street address from a map point	Main key (falls back to OpenStreetMap)
Explore in 3D	Main key, loaded in the browser
Route planner driving distances	Server key, then main key

Tips

- Use two keys so the browser key can be locked to your domain and the server key to your IP.
- Server-side address lookups send your site address as the referrer, so a domain-restricted main key can still work. (The restriction behaviour with Google was not verified.)
- Set a budget alert in Google Cloud so a bad day cannot surprise you.
- Never put the server key in a web page.

If something goes wrong

- Autocomplete falls back to OpenStreetMap: the key is empty, the API is not enabled, or the restriction blocks your site.
- "Explore in 3D" does not show: see *Explore in 3D*.
- Route distances look like straight-line guesses: add the server key, or set an OSRM address (see *OSRM routing URL*).

Turning on Explore in 3D

Explore in 3D needs a Google Maps key with the Maps JavaScript API enabled. Here is how to turn it on and what customers see.

Explore in 3D lets a customer fly around their home in Google 3D, save favorite angles, and take a snapshot from that spot to start a design.

Before you start

- A Google Maps key (see *Google Maps keys*).
- The **Maps JavaScript API** must be enabled for that key in Google Cloud.
- The key should be restricted to your website address.

Steps

1. Open **Settings → VisionScaper** in WordPress admin.
2. Paste your key in **Google Maps API key (optional)**.
3. Press **Save Changes**.
4. Open your Designer page as a visitor.
5. Start a new design. The photo choices now include **Explore in 3D**. (The option only appears when a Maps key is saved.)

What the customer does

1. Type an address and press **Go**.
2. Drag to orbit, scroll or pinch to zoom, right-drag to tilt.
3. Press **Save this angle** and give it a name.
4. Press **View** on a saved angle to fly back, or **Snap from here** to use that view as the design photo.
5. Saved angles can be removed with the delete button.

Tips

- The address search needs a located address. If Google autocomplete is on, picking a suggestion flies there at once.
- Saved angles stay with the project.
- If you do not want this feature, leave the key empty. The option disappears.

If something goes wrong

- The option is missing: the Maps key box is empty or unsaved.
- The message "3D view is unavailable right now. You can still take or upload a photo." appears: the Maps JavaScript API may not be enabled, billing may be off, the key's restriction may block your domain, or Google 3D may not cover that spot.
- "Address not found." Check the spelling or try a nearby address.
- Clear the browser cache after changing the key.

Google sign-in for customers

Let customers sign in with Google by creating an OAuth client and pasting the Client ID and secret, using the redirect address VisionScaper shows.

Customers can sign in with Google instead of making a password. Accounts are normal WordPress Subscriber accounts.

Before you start

- A Google Cloud project.
- Your site on `https://`.
- A privacy policy page address.

Steps

1. Open **Settings → VisionScaper** in WordPress admin and scroll to **Sign in with Google**. Keep this tab open.
2. In Google Cloud, go to APIs & Services → Credentials. Follow Google's current instructions.
3. Set up the **OAuth consent screen**: choose External, add your app name, your email and your privacy policy address, then publish the app.
4. Create credentials: **OAuth client ID → Web application**.
5. Under **Authorized redirect URIs**, add the address shown in the VisionScaper numbered list. It looks like your home address followed by `?dreamscaper_oauth=google`. Copy it exactly from the screen.
6. Copy the Client ID and Client secret from Google.
7. Paste them into **Google Client ID** and **Google Client secret**.
8. Press **Save Changes**.
9. Visit your Designer page signed out. A Google sign-in button appears once both boxes are filled.

What VisionScaper asks Google for

The scopes are `openid email profile`. Google must report the email as verified, or the sign-in is refused.

Tips

- The redirect address must match exactly, including `https` and any `www`.
- Changing your site address means updating the redirect address in Google.
- Staff accounts must use a password. Staff who try Google sign-in are told to use a password.
- A customer who has two-step sign-in on is turned away from social sign-in and told to use password plus code. See *Security: two-step sign-in*.

If something goes wrong

- "That sign-in option isn't set up yet." One of the two boxes is empty.
- "That sign-in link expired. Please try again." The sign-in link only lasts 15 minutes.
- "We couldn't finish signing you in." The secret is wrong or the redirect address does not match.
- "Sign-in was cancelled." The customer closed the Google window.
- Google warns the app is not verified: publish the consent screen and follow Google's current verification steps.

Facebook sign-in for customers

Create a Meta app, add the redirect address VisionScaper shows, and paste the App ID and App secret.

Customers can sign in with Facebook. Like Google sign-in, it creates a normal WordPress Subscriber account.

Before you start

- A Meta for Developers account.
- A privacy policy page.
- A page that explains how a customer can delete their data.

Steps

1. Open **Settings → VisionScaper** and scroll to **Sign in with Facebook**.
2. In Meta for Developers, choose **My Apps → Create app**. Use the use case "Authenticate and request data from users with Facebook Login". Follow Meta's current instructions.
3. In Facebook Login → Settings, add the address shown on the VisionScaper screen to **Valid OAuth Redirect URIs**. It is your home address followed by `?dreamscaper_oauth=facebook`.
4. Under App settings → Basic, add your privacy policy address and a data-deletion instructions address.
5. Switch the app to **Live**.
6. Copy the App ID and App secret.
7. Paste them into **Facebook App ID** and **Facebook App secret** in VisionScaper.
8. Press **Save Changes**.

What VisionScaper asks for

The scope is `email,public_profile`. If a Facebook account has no email, VisionScaper makes a placeholder email and the app asks the customer for a real one.

Tips

- For the data-deletion address, your privacy page can say customers can delete their account in VisionScaper by choosing **Delete account** from the account menu. That is a real button in the Designer.
- Test with a second Facebook account that is not an app admin once the app is Live.
- The sign-in button only appears when both ID and secret are saved.

If something goes wrong

- "That sign-in option isn't set up yet.": a box is empty.
- "We couldn't read your account details. Please try again or use email.": Facebook returned no profile. Check that the app is Live and permissions are granted.
- A staff member sees "Please sign in to staff accounts with a password." This is deliberate.
- A redirect error from Facebook: the address in Meta does not match the one shown in VisionScaper.

fal.ai key and what it powers

The fal.ai key powers AI Smart Select, item identification and several AI helpers. Paste it once and set daily limits.

The fal.ai key is the most widely used AI key in VisionScaper.

Before you start

- A fal.ai account with credit. Check fal.ai's current pricing.
- WordPress admin access.

Steps

1. Create a key in your fal.ai dashboard. Follow their current instructions.
2. Open **Settings → VisionScaper** in WordPress admin and find the **AI** section.
3. Paste the key into **fal.ai API key**.
4. Press **Save Changes**.

What uses this key

- AI Smart Select (the segmenting tool) and identifying garden items and materials.
- The vision model setting (see *Vision model setting*).
- Community picture checks, if you tick "Check posted pictures with AI before they go live".
- AI Marketing helpers.
- AI quote and property-walk helpers in the Contractor Hub and the phone app. The phone-app options are separate tick boxes: voice-note summaries, and estimate from a recorded walk. Both start off.

Per-customer daily limits

- **AI image generations per customer per day** sets how many AI images each signed-in customer can make a day. The code accepts 0 to 500.
- Every VisionScaper AI design, tweak and AI-tool edit uses one. Smart Select and Identify are free to the customer.
- **No daily limit for site administrators (for testing)** lets admins skip the limit.
- Customers can buy extra credits if you enable the store. See *Stripe setup*.
- The default limit in the code is a placeholder, not approved.

Tips

- Start with a low daily limit, then raise it once you see real usage.
- Watch your fal.ai balance. When it runs out, AI buttons fail.
- Smart Select and identify show as available only when this key exists. If Pl@ntNet is also set, plant identification tries Pl@ntNet first.

If something goes wrong

- AI tools are greyed out for a signed-out visitor: expected. They need an account.
- Marketing screen says AI is "off — add a fal.ai key": the key box is empty.
- Calls fail with errors after working before: fal.ai credit may have run out, or the key was revoked.

Black Forest Labs FLUX key and model

The Black Forest Labs key makes VisionScaper AI images. Paste the key, keep the default model, and set the daily limit.

The Black Forest Labs (BFL) key powers the image-making AI: VisionScaper AI, and the AI Erase, Make it real, and Season and Light tools.

Before you start

- A Black Forest Labs account with credits added. Use the provider's dashboard and follow its current instructions.
- WordPress admin access.

Steps

1. Open **Settings → VisionScaper** and find the **AI** section.
2. Paste your key into **Black Forest Labs API key**.
3. Leave **BFL model** as `flux-2-klein-4b` unless you have a reason to change it. The screen says to leave it as that.
4. Set **AI image generations per customer per day**.
5. Optionally tick **No daily limit for site administrators (for testing)**.
6. Press **Save Changes**.

What happens when the key is saved

- AI image features turn on for signed-in customers.
- The credits indicator shows in the customer's account menu.
- The credit store (see *Stripe setup*) only works when this key, the Stripe key and the store switch are all set.

Cost

The settings screen notes an approximate per-image cost for the default model. Prices change. Check the provider's current pricing before you set the daily limit and any credit packs.

Tips

- Test with your own admin account first.
- Keep the daily limit modest at first.
- Customers who run out of free credits can buy more, if you turn the store on.
- Use a separate key for this site so you can revoke it without affecting anything else.

If something goes wrong

- AI image buttons stay disabled: the BFL key box is empty.
- Images fail after working before: your BFL credit may be used up.
- Pictures use a model you did not expect: check the **BFL model** box for stray text.
- A customer says "no credits left": they have used their daily limit. It resets each day.

Vision model setting

The Vision model box chooses which language and vision model fal.ai runs for identify, helpers and checks.

VisionScaper sends many "look at this picture and tell me" jobs, and many text jobs, through fal.ai's `any-llm` service. The **Vision model (fal any-llm)** setting picks the model name.

Before you start

- A saved fal.ai key (see *fal.ai key*).

Steps

1. Open **Settings → VisionScaper** in WordPress admin.
2. In the **AI** section, find **Vision model (fal any-llm)**.
3. The default is `google/gemini-2.5-flash`.
4. To change it, type a model name that fal.ai's `any-llm` service accepts. Look up the current list in fal.ai's own documentation.
5. Press **Save Changes**.
6. Test one feature that uses it, such as identifying a plant or garden item.

What uses this setting

The same model name is sent for: - Identifying garden items and materials. - AI Marketing drafts. - Community picture checks. - AI quote and property-walk helpers. - Other AI helper jobs in the Contractor Hub.

Tips

- Leave the default unless you have a clear need.
- Change one thing at a time and test straight after.
- If you break it, paste the default back in.
- The box must hold a plain model name. Special characters are stripped.

If something goes wrong

- Helpers return errors after you change it: the name may not be a valid fal.ai model name. Put `google/gemini-2.5-flash` back.
- Do not leave the box empty. Paste `google/gemini-2.5-flash` back if you are unsure.
- Everything AI fails: check the fal.ai key and your balance first.

Pl@ntNet key for plant identification

Add a Pl@ntNet key so Plant ID can name plants and weeds from photos, with fal.ai as a backup.

Plant ID uses Pl@ntNet to name plants and weeds from a photo.

Before you start

- A Pl@ntNet account. Create one at the provider's site and copy your API key, following their current instructions.
- The VisionScaper screen notes the free allowance as up to 500 identifications a day. Confirm the current limit with Pl@ntNet.

Steps

1. Open **Settings → VisionScaper** in WordPress admin.
2. In the **AI** section, find **Pl@ntNet API key**.
3. Paste your key.
4. Press **Save Changes**.
5. Open the Designer, choose Plant ID, and try a clear photo of a leaf.

How identification works

- If a Pl@ntNet key is saved, VisionScaper asks Pl@ntNet first and uses its best match.
- If the match is weak (the code uses a confidence below 0.35) and a fal.ai key is saved, VisionScaper asks the fal.ai vision model as well.
- With no Pl@ntNet key but a fal.ai key, the vision model does the work.
- With neither key, identification is not available.
- Identify is free for the customer. It does not use their daily AI credits.

Tips

- Good photos matter: one leaf or flower, in focus, in daylight.
- Using both keys gives the best results.
- A Plant ID can earn community points if the community is on. Those point values are your own settings.

If something goes wrong

- Plant ID says it is not available: neither key is saved.
- Results are poor: retake the photo, or add the fal.ai key as backup.
- Identification stops partway through the day: you may have reached Pl@ntNet's daily allowance.
- Wrong plant named: all identification is a suggestion. Customers should check.

Twilio text messaging setup

Connect Twilio so VisionScaper can send and receive texts, including the registration US carriers require.

Twilio is the default text service. It sends texts to customers and logs their replies.

Before you start

- A Twilio account and a local phone number that can text.
- US texting needs **A2P 10DLC registration**. Carriers block texts until it is approved.
- Follow Twilio's current instructions for each of these.

Steps

1. In Twilio, buy a number with SMS.
2. In Twilio Console, register your business and a campaign for customer care or account notifications, as the VisionScaper screen advises.
3. Optional but recommended: create a **Messaging Service**, add your number, and copy its SID (it starts with `MG`).
4. In WordPress admin, open **Settings → VisionScaper** and find **Text messages (Twilio)**.
5. Paste **Twilio Account SID** (starts with `AC`).
6. Paste **Twilio Auth Token**.
7. Paste **Twilio phone number**, like `+18605550100`. You can skip this if you use a Messaging Service.
8. Paste **Messaging Service SID (optional)**.
9. Press **Save Changes**.
10. In Twilio, set the number's (or Messaging Service's) "A message comes in" to **Webhook, HTTP POST**, using the address shown in the VisionScaper screen. It ends in `/wp-json/dreamscaper/v1/crm/twilio`.

What this does

- Customer replies are logged in the CRM and emailed to the contractor.
- Texts from unknown numbers become leads.
- STOP is honored.
- Marketing texts need their own marketing campaign in Twilio. See the VisionScaper Marketing page.

Missed-call text-back

On **Settings → VisionScaper Marketing**, you can offer missed-call text-back. Buy one Twilio number per contractor, add it to your Messaging Service, and assign it on that page. In Twilio, point "A call comes in" to the `crm/voice` address and "A message comes in" to the `crm/twilio` address shown on the page.

Tips

- Choose which text service is main on **Settings → VisionScaper Messaging**. See *Telnyx text setup* for the backup option.
- Test with your own mobile number first.

If something goes wrong

- "Text messages aren't set up yet." One of the Twilio boxes is empty.
- Texts send but never arrive: A2P registration may be pending.
- Replies do not show in the CRM: check the incoming-message webhook address and that your site is on `https://`.

Telnyx text messaging and failover

Use Telnyx as your main text service or as a backup to Twilio on the VisionScaper Messaging page.

Telnyx is the second text service. You can choose it as main, or let it step in when Twilio fails.

Before you start

- A Telnyx account, a texting number, and a messaging profile. Follow Telnyx's current instructions.
- Complete the carrier registration Telnyx requires for US business texting.

Steps

1. In WordPress admin, open **Settings → VisionScaper Messaging**.
2. Under **Texts**, find **Text service**. Choose **Twilio** or **Telnyx**.
3. Tick **If it fails, try the other one** to turn on failover.
4. Paste your **Telnyx key**.
5. Paste **Telnyx webhook secret**, if Telnyx gave you one for webhooks.
6. Enter **Telnyx sending number**.
7. Enter **Telnyx messaging profile**.
8. Copy the **Webhook address** shown on the page into your Telnyx webhook settings.
9. Press **Save**.

Blank boxes keep the value you saved before. Type a new value to replace it.

How failover works

- VisionScaper tries the main service first.
- If it fails for a provider reason, it tries the other service once.
- If the customer's number is the problem (a bad number, a customer who replied STOP), it stops. Another carrier will not help.
- Each text gets "Reply STOP to opt out." added if STOP is not already in it.

Safety controls on the same page

- **Stop all texts and emails on this site (kill switch).**
- **Only let a business text after its "Get ready to text" details are approved.**
- **Hide phone numbers and email addresses inside saved messages.**
- **Keep conversations for (days, 0 = forever).**
- **Most texts per business per month (0 = no limit).**
- Prices and message packs on the page are placeholders until you set your own.

If something goes wrong

- Telnyx webhooks are rejected with "Bad signature": the webhook secret does not match. VisionScaper checks a signature header on incoming events. (The provider's own signature scheme is not implemented; a generic signature is used.)
- Texts fail with Telnyx chosen: check key, sending number, and that the sample-customer rule is not blocking you. Sample customers are never texted.

Stripe setup (credits, storage and contractor payments)

Paste your Stripe secret key and webhook signing secret to sell credits and storage and to let contractors get paid online.

One Stripe account covers three jobs: selling AI credits, selling extra storage, and Stripe Connect payments for contractors.

Before you start

- A Stripe account with your business details finished. Follow Stripe's current instructions.
- Use test keys first. A test key starts with `sk_test_`. A live key starts with `sk_live_`.

Steps

1. In Stripe, copy your **Secret key** from the developer API keys area.
2. In WordPress admin, open **Settings → VisionScaper**, section **Selling extra AI credits**.
3. Paste it into **Stripe secret key**.
4. In Stripe, add a webhook endpoint. The address is shown on the VisionScaper screen. It ends in `/wp-json/dreamscaper/v1/stripe`.
5. Select the event `checkout.session.completed`.
6. Copy the **Signing secret** (it starts with `whsec_`).
7. Paste it into **Stripe webhook signing secret**.
8. Tick **Let customers buy extra AI credits** to open the store. Credits also need a Black Forest Labs key.
9. Edit **Credit packs**, one per line: `Name | credits | price in dollars`.
10. Press **Save Changes**.

Credits are also confirmed when the customer returns to your site, so a missed webhook should not lose a purchase.

Extra storage

Tick **Let customers buy extra storage** and edit **Storage packs** (`Name | megabytes | price in dollars`). The prices in the boxes are placeholders, not approved. Set your own.

Contractor payments (Stripe Connect)

- Contractors connect their own Stripe account in the Contractor Hub under **Settings → Get paid online (Stripe)**.
- In your Stripe Dashboard, turn on **Connect** (Express accounts).
- Add these events to the webhook: `checkout.session.completed`, `checkout.session.async_payment_succeeded`, `checkout.session.async_payment_failed`, and `account.updated`.
- Fee boxes on the VisionScaper page set the rates a contractor pays. Their defaults are placeholders, not approved.
- **Let customers pay by bank account (ACH)** and **Offer contractors Instant Payouts** are tick boxes. Instant Payouts also need Instant Payouts and Account Debits enabled in Stripe. Test in test mode first.
- Automatic payments (autopay) is a separate switch and is off until you turn it on.

Tips

- Check Stripe's own fees before you set prices.
- The page also lists **Recent purchases**.

If something goes wrong

- The store does not appear: you need the store switch, the Stripe secret key and a Black Forest Labs key.
- Payments succeed in Stripe but nothing arrives: the webhook may be wrong. Check the signing secret.

Email providers (Postmark, Resend, SendGrid, Amazon SES, site mail)

Choose how VisionScaper sends marketing and system email, and where each provider's key goes.

VisionScaper can send email through your website's own mail or through a delivery service. Marketing email and the Messaging page use separate screens.

Before you start

- An account with the provider you pick.
- A sending domain with the provider's DNS records added (DKIM and return-path). The Marketing page also mentions publishing a DMARC record, which Gmail and Yahoo require for bulk mail.
- Follow each provider's current instructions.

Steps for Postmark (marketing email)

1. Open **Settings → VisionScaper Marketing**.
2. Under **Email service**, choose **Postmark (recommended)**.
3. Paste the **Postmark Server API token**.
4. Enter the **Broadcast stream ID** (usually `broadcast`).
5. Enter **Send from address**. It must be verified in Postmark.
6. Set **Sender name**. `{company_name}` becomes each contractor's business name.
7. Copy the **Postmark webhook** address into Postmark's Broadcast stream webhooks. Tick Delivery, Bounce, Spam Complaint and Subscription Change.
8. Press **Save & send me a test email**.

Steps for the other providers

1. Open **Settings → VisionScaper Messaging**, section **Email**.
2. In **Email service**, pick Resend, SendGrid, or Amazon SES. Or keep "Use the one in Marketing settings".
3. Paste the matching boxes: - Resend key, Resend webhook secret. - SendGrid key, SendGrid webhook secret. - Amazon access key, Amazon secret key, Amazon webhook secret, and Amazon region (like `us-east-1`).
4. Press **Save**.

Using the site's own mail

Choose **This website's own mail (your SMTP plugin)** on the Marketing page. It is fine for tests and small lists. It has no bounce handling, and many mailboxes limit daily sending.

Tips

- Send a test email each time you change a key.
- Dependable sending needs scheduled jobs to run. The Marketing page shows a health line and warns if they are not.
- Costs per email on those pages are numbers you set for reporting. They are placeholders until you edit them.

If something goes wrong

- Test email not received: check spam, then the verified sender and DNS records.
- "Scheduled sending isn't running regularly": see *Cron, caching, SSL and REST troubleshooting*.
- Webhook events rejected: the webhook secret does not match.

AI Receptionist provider keys (Retell, Vapi, Bland, ElevenLabs and more)

Paste the keys for the voice-agent engine, the voice layer and the phone carrier on the VisionScaper AI Receptionist page.

The AI Receptionist answers calls using three kinds of outside service. This page is for the site administrator.

Before you start

- Accounts with the services you choose. Follow each provider's current instructions.
- A phone carrier: Twilio (default) or Telnyx.

What each part does

Part	Choices
Voice-agent engine	Retell AI (the default), Vapi, Bland
Voice layer	ElevenLabs (default), Cartesia, Deepgram
Phone carrier	Twilio (default), Telnyx

Steps

1. Open **Settings → VisionScaper AI Receptionist** in WordPress admin.
2. Copy the **webhook address** at the top. It ends in `/receptionist/webhook/ENGINE`, where ENGINE is `retell`, `vapi` or `bland`. Give the right one to each voice service.
3. Copy the **voice address** (it ends in `/receptionist/voice`) for the phone number's voice setting.
4. In **Keys**, fill the boxes for the engine you will use. For each of Retell AI, Vapi and Bland there are three: **API key**, **webhook secret**, and **phone address (SIP)**.
5. Fill **ElevenLabs key**, **Cartesia key**, **Deepgram key** for the voice layer you want.
6. Fill **Telnyx key** if you use Telnyx.
7. Press **Save Changes**.

Saved boxes show "saved – leave blank to keep". A blank box does not erase the saved key.

Other settings on the page

- Prices (what the service costs per minute), margin, overage and monthly limit are placeholders until you set your own.
- **Keep transcripts and recording links for (days; 0 = forever).**
- **Hide phone numbers and emails in saved transcripts.**
- **Kill switch** stops all AI Receptionist calling and campaigns.
- Included minutes per plan are set under **VisionScaper Plans**.

Tips

- The AI always says it is an AI. No setting removes that.
- Start with one engine, one voice layer and one carrier.
- Test with a call to your own phone.

If something goes wrong

- Webhooks do not arrive: your site must be reachable over `https://`.
- Signature errors: re-copy the webhook secret.
- No audio or voice: check the voice-layer key and balance.

Expo access token for the phone app

Push notifications go through Expo. You only need an access token if Expo's enhanced push security is on.

The VisionScaper phone app signs in with each person's own account, so there is nothing to set up for sign-in. Push notifications are sent through Expo's push service, which delivers to iPhones (Apple APNs) and Android phones (Google FCM).

Before you start

- Decide whether your Expo project has **enhanced push security** turned on. If it is off, leave the token blank.

Steps

1. In your Expo account, create an access token. The screen says: expo.dev → Account settings → Access tokens. Follow Expo's current instructions.
2. In WordPress admin, open **Settings → VisionScaper**.
3. Find the **Mobile app (push notifications)** section.
4. Paste the token into **Expo access token (optional)**.
5. Press **Save Changes**.

When a token is saved, VisionScaper sends it as a Bearer authorization header with each push request. With no token, requests go without it.

Other phone-app switches in the same section

These are tick boxes on the same screen. They all start off. - **Voice-note summaries.** Lets the phone app summarise dictated notes with AI. Uses your fal.ai key. Each summary is one AI call. The screen states 200 a day per business, and a person accepts every suggestion. - **Estimate from a recorded walk.** Turns a dictated property walk into a DRAFT quote with AI. Uses your fal.ai key. Only typed or dictated text goes out, with emails and phone numbers removed. The screen states up to 30 a day and 3 tries per walk. Prices always come from your rates and a person reviews every line. - **Automatic payments (autopay).** Lets customers save a card or bank account with Stripe and invoices marked autopay charge it on the due date. Nothing is charged while it is off.

Tips

- Push messages are sent in batches of 100.
- If a phone is no longer registered, VisionScaper clears its stored push token, so it is not tried again.
- Treat the token like a password.

If something goes wrong

- No pushes at all: check the phone has allowed notifications, and that the person is signed in on the app.
- Pushes fail with an authorization error: your Expo project needs a token, so paste one in.
- A token was pasted by mistake: tick the clear option or paste the correct value. Leaving the dots keeps the old one.

Connecting QuickBooks Online

Create an Intuit app, paste its Client ID and secret into Connected apps, and choose how customers, invoices and payments sync.

QuickBooks Online connects per business, from the Contractor Hub. It syncs customers, and can send invoices, payments and approved expenses. QuickBooks Desktop is not supported. Use CSV import and export instead.

Before you start

- A QuickBooks Online login and a developer account with Intuit.
- Owner access in the Contractor Hub.

Steps

1. In the Contractor Hub, open **Settings → Connected apps**.
2. Find the **QuickBooks Online** card and open **Set-up walkthrough**.
3. At developer.intuit.com, create an app for QuickBooks Online and Payments with the scope `com.intuit.quickbooks.accounting`.
4. Under Keys and credentials, finish Intuit's questionnaire for Production keys.
5. Under Redirect URIs, add the address shown on the card (use the **Copy** button).
6. Optional, for instant updates: add a Webhooks endpoint with the address shown, using the Customer entity. Paste the key Intuit shows into **Security key** (optional) on the card.
7. Paste **Client ID** and **Client secret**.
8. Choose **QuickBooks company**: **Production (my real company)** or **Sandbox (testing)**.
9. Choose **How data moves**: **Import only (into VisionScaper)**, **Export only (from VisionScaper)**, or **Both ways (changes go each direction)**.
10. Press **Save settings**, then **Connect QuickBooks Online** and pick your company.

Optional switches

- **Update automatically every hour.**
- **Pass on deletions.** The screen says off is safer. QuickBooks never deletes customers. They become inactive.

Money sync

Once connected, a second card offers **Send invoices and payments to QuickBooks** (hourly and when something changes) and **Also send approved expenses**. Nothing is ever deleted in QuickBooks. A cancelled invoice is voided. There is a log with Retry and Needs review items.

Tips

- If both sides changed a record, it goes to **Needs review** and nothing is overwritten.
- QuickBooks needs unique display names. On a clash, VisionScaper adds the town or a number and tells you.
- Refresh tokens roll. You get a message to **Reconnect** when one expires.

If something goes wrong

- "QuickBooks refused the connection. Tap Reconnect in Settings → Connected apps."
- Connect is disabled: keys are not saved yet.
- Sandbox company shows no real data: switch the setting to Production.

Connecting Xero

Send customers, invoices and payments one-way to Xero by pasting a Client ID and secret and choosing account codes.

The Xero card sends data one way, from VisionScaper to Xero. It is owner-only and appears under **Settings → Connected apps** in the Contractor Hub. Your plan must include it (plan assignment is a placeholder).

Before you start

- A Xero organisation and a developer app (type: web app) at developer.xero.com. Follow Xero's current instructions.

Steps

1. In Xero's developer area, create an app.
2. Add the redirect address shown on the VisionScaper card.
3. Copy the Client ID and Client secret.
4. In VisionScaper, paste them under **Client ID** and **Client secret**, then press **Save keys**. The secret is stored scrambled and never shown again.
5. Press **Connect to Xero**, sign in, and choose your organisation.
6. Enter **Xero account for sales** (Xero's usual one is 200).
7. Enter **Xero bank account for payments**. This is needed before payments can be sent.
8. Press **Look up my Xero accounts** to pick from lists.
9. Tick what to send: **Send customers**, **Send payments**, and **Send automatically every hour**.
10. Press **Save settings**, then **Send to Xero now**.

What to know

- Existing Xero customers and invoices with the same name or number are adopted, not duplicated.
- Sales tax goes across as its own line.
- A record Xero turns down is set aside with Xero's reason. After you fix it, press **Try again after fixing**.
- Disconnect keeps the links, so reconnecting never sends twice. Nothing in Xero is deleted.
- Manual sending is limited. The docs state 60 per hour.
- Nothing is read back from Xero, and Xero webhooks are not built.

Tips

- If you manage several organisations, use the **Xero organisation** drop-down. Records already sent to another organisation are not resent.
- Xero charges for its own plan. VisionScaper adds no fee.

If something goes wrong

- "Xero needs you to sign in again. Nothing is being sent until you do." Press **Reconnect**.
- Payments will not send: add the bank account code.
- Not tested against a live Xero account. Try on a test organisation first.

Google Contacts sync and calendar feeds

Sync customers with Google Contacts, and subscribe Google Calendar to a private VisionScaper calendar feed.

There are two separate things here. Google Contacts uses a Google key. The calendar uses a private link, not a key.

Google Contacts

Before you start

- A Google Cloud project. You can reuse the one for "Sign in with Google".
- Owner access in the Contractor Hub.

Steps

1. In the Contractor Hub, open **Settings → Connected apps**, card **Google Contacts**.
2. Open the **Set-up walkthrough**.
3. In Google Cloud, enable the **People API**.
4. On the OAuth consent screen, choose External, add your email, and under Scopes add the contacts scope. Set publishing to **In production**, or Google disconnects you every 7 days.
5. Create credentials: **OAuth client ID → Web application**. Add the redirect address shown (use **Copy**).
6. Paste **Client ID** and **Client secret** in VisionScaper.
7. Optionally fill **Only import contacts with this Google label**. This keeps family and friends out of your CRM.
8. Choose **How data moves** and press **Save settings**, then **Connect Google Contacts**.
9. Google may warn the app is not verified. Press Advanced, then Continue. It is your own app.

Exported customers go into a "VisionScaper Customers" label.

Calendar

VisionScaper does not log into your Google Calendar. Instead each person gets a private calendar feed (an ICS link) that Google, Apple or Outlook can subscribe to. Each appointment also has an add-to-calendar file.

1. Open the calendar sync panel from your Schedule (the panel title comes from the app's wording list; the exact menu path was not verified).
2. Press **Google Calendar** to subscribe in Google. Or press **Apple Calendar / Outlook**. Or copy the private link under "Or copy this private link into any calendar app" and use Subscribe or From URL.
3. Anyone with the link can see your appointment times. If you shared it by mistake, press **Make a new private link**. The old link stops working and you must re-subscribe.

Feeds update when your calendar app refreshes. Google can take a while.

Tips

- Keep deletions off at first.
- Records changed on both sides go to Needs review and nothing is overwritten.
- Hourly sync runs from WordPress cron.

If something goes wrong

- "Google says the connection expired or was removed. Tap Reconnect."
- "Google didn't accept the Client ID / secret."
- "There's no label called ..." Fix the label or leave the box blank.

OSRM routing server address

Point VisionScaper at your own OSRM server for driving distances when you do not use a Google server key.

The Route planner needs driving distances. VisionScaper picks the best source it has.

Order of choice

1. A Google key (the server key, or the main key if the server key is empty).
2. An **OSRM routing server (optional)** address you host.
3. Without either, the planner estimates road miles from straight-line distance.

Before you start

- A running OSRM server that your website can reach over `https://`. You or your host must run it. This manual does not cover installing OSRM.

Steps

1. Open **Settings → VisionScaper** in WordPress admin.
2. Find **OSRM routing server (optional)** in the Basics area.
3. Type the address, for example `https://osrm.example.com`.
4. Press **Save Changes**.
5. Try the Route planner.

Rules enforced

- Only `https://` addresses are saved. Any other value is cleared to blank.
- The address is trimmed of a trailing slash when used.

Tips

- The public OSRM demo servers are meant for light use. Check their terms.
- Keep your OSRM data fresh so new roads appear.
- If you use Google's Routes API for distances, the OSRM box is not needed.

If something goes wrong

- The box turns blank after saving: it did not start with `https://`.
- The route planner still gives rough mileage: neither Google nor OSRM answered. Test the server address in a browser.
- The phone app's dispatch view shows no routing: it reports "osrm" only when this box is filled. Otherwise it shows none. (This reading is from the code and was not tested.)

Map tiles and aerial imagery settings

Set the door-to-door map tiles and the aerial image service used outside Connecticut.

Two groups of settings on **Settings → VisionScaper** control maps.

Door-to-door map tiles

Contractors tap houses on a street map to log door-to-door visits. By default it uses OpenStreetMap, which is fine for light use.

Steps

1. Sign up with a tile provider (for example MapTiler or Stadia Maps). Follow their current instructions.
2. In WordPress admin, open **Settings → VisionScaper**, section **Door-to-door map**.
3. Paste your tile address into **Map tile address (optional)**. It must contain `{z}`, `{x}` and `{y}`. Example from the screen: `https://api.maptiler.com/maps/hybrid/{z}/{x}/{y}.jpg?key=YOUR_KEY`.
4. Enter **Map credit line**, as your provider requires.
5. Enter **Deepest zoom level**. Usually 19 to 20.
6. Press **Save Changes**.

Bird's-eye imagery outside Connecticut

Connecticut addresses always use the state's 3-inch imagery. Everywhere else uses the ArcGIS image service in your settings.

Steps

1. Find **Bird's-eye imagery outside Connecticut**.
2. **Image service address**: the default is the USGS NAIP service (public domain, nationwide, about 2 ft per pixel). To change it, paste another ArcGIS `.../ImageServer/exportImage` or `.../MapServer/export` address whose terms allow measuring and tracing.
3. **Imagery credit line**: shown with the image.
4. **Imagery resolution (feet per pixel)**: NAIP is about 2. It tells contractors how precise traced edges are.
5. Save.
6. Leave the address empty to turn bird's-eye imagery off outside Connecticut.

Tips

- NAIP is good for property lines, the house and driveway. Small features are measured with a tape in the Landscape Plan wizard.
- Downloaded tiles are cached on your server for a period, and new downloads are rate-limited per visitor. (The code comment says 60 days.)
- Always check the imagery provider's terms.

If something goes wrong

- Map tiles stay on OpenStreetMap: the address is missing `{z}`, `{x}` or `{y}`.
- Blank squares at high zoom: lower **Deepest zoom level**.
- No imagery outside Connecticut: the image service box is empty.

Connect other tools overview (access keys, alerts, Zapier)

What the Connect other tools screen does, who can use it, and how its four tabs fit together.

Connect other tools lets other software work with your VisionScaper data, or lets VisionScaper tell another tool when something happens.

In the Contractor Hub it sits under **Settings** as **Zapier & API keys**. The screen heading is **Connect other tools**, and its address is `#/settings/api`.

Who can use it

- It is a plan feature (called `api.access`). Which plans include it is a placeholder, not approved.
- Owners and managers who can manage the team can open it.
- If your plan does not include it, you see the message and a **See plans** button.
- The hourly request limit also comes from your plan and is a placeholder, not approved.

The four tabs

Tab	What it is for
Access keys	Make named keys that other software uses to read or add data.
Alerts to other tools	Have VisionScaper send a signed message to a web address when something happens.
Zapier	Addresses and steps for connecting Zapier.
How it works	A short guide, the starting address, and a sample request.

The top of the screen also shows how many requests per hour your plan allows across all keys together, and how many were used this hour.

Steps to get started

1. Open **Settings → Zapier & API keys**.
2. On **Access keys**, type what will use it (for example "Zapier") and tick what it may do. Press **Make a key**.
3. Copy the key now. It is shown once.
4. Either call the interface yourself (see *API authentication and base URL*) or set up alerts (see *Alerts (webhooks): setup and events*).

Tips

- Nothing here changes how you use VisionScaper day to day.
- Make one key per tool, so you can turn off one without breaking the others.
- You can have up to 20 active keys and up to 25 alerts.

If something goes wrong

- The screen says "This is not part of your plan.": your plan does not include it.
- You cannot see the screen: your login may not have team-management permission.
- Other messages: see *API errors and rate limits*.

Creating access keys and choosing scopes

Make a named access key, choose its scopes, copy it once, and turn it off when it is no longer needed.

An access key is a long secret that lets other software act for your business. A scope limits what the key can do.

Steps to make a key

1. Open **Settings → Zapier & API keys**, tab **Access keys**.
2. Under **Make a key**, fill **What will use it?** For example, "Zapier" or "Reporting sheet". The name can be up to 80 characters.
3. Under **What may it do?**, tick at least one scope.
4. Press **Make a key**.
5. A box titled **Copy your new key now** appears. Press **Copy key**.
6. Store the key in a password manager.
7. Press **I have saved it**.

The full key is shown only once. VisionScaper stores a one-way hash and keeps just the first 12 characters so you can recognise it. If you lose it, turn it off and make another.

The scopes

Tick box on screen	Scope name	Lets the key
Look at customers and leads	`read_customers`	List and fetch customers
Add and change customers	`write_customers`	Create and update customers
Look at quotes	`read_quotes`	List and fetch quotes
Look at invoices	`read_invoices`	List and fetch invoices
Look at jobs	`read_jobs`	List and fetch jobs
Add new leads	`write_leads`	Post leads
Look at payments	`read_payments`	List payments
Set up alerts (needed by Zapier)	`webhooks_manage`	Make, list and delete alerts

Key format

A key looks like `vsk_` plus 8 characters, an underscore, then 40 more (all lowercase letters and digits). Anything that does not match is refused as invalid.

Turning a key off

1. In **Your keys**, find the key. It shows the first characters, its scopes, when it was last used, and how many times.
2. Press **Turn off**, and confirm. A turned-off key stops working at once. The list keeps it, marked "Turned off".

Tips

- Give each key the fewest scopes it needs.
- A key that can only read cannot change anything.
- Rotate keys when people leave.
- Every creation and shutdown is written to the activity notes.
- Limit: 20 active keys per business.

If something goes wrong

- "Give the key a name so you remember what uses it." Fill the name box.
- "Choose at least one thing this key may do." Tick a scope.
- "You have 20 active keys." Turn one off first.
- Calls answer 403 "insufficient_scope": see *API errors and rate limits*.

API authentication and base URL

How to send your access key as a Bearer token, the starting address, and a first test with the ping route.

All requests use JSON and an access key.

Before you start

- A key (see *Creating access keys and choosing scopes*).
- Your website must be reachable over `https://`.
- Plan inclusion for Connect other tools.

The base address

```
https://YOURSITE/wp-json/dreamscaper/v1/api/v1/
```

The exact base address is also shown on the **How it works** tab as **Starting address**, with a Copy button. Zapier routes sit next to it at `https://YOURSITE/wp-json/dreamscaper/v1/zap/`.

If your site does not use pretty permalinks, WordPress also accepts `?rest_route=/dreamscaper/v1/api/v1/ping` (a standard WordPress feature).

Sending the key

Send it in the `Authorization` header:

```
Authorization: Bearer vsk_xxxxxxxx_xxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxx
```

An `X-API-Key` header is also accepted as a fallback. Prefer Bearer.

Steps: a first test

1. Open a terminal or an API testing tool.
2. Run:

```
curl https://YOURSITE/wp-json/dreamscaper/v1/api/v1/ping \
  -H "Authorization: Bearer YOUR_KEY"
```

3. A good answer is JSON with `"object": "ping"` and `"ok": true`. It also includes your business name, the key's name, prefix and scopes, and your rate allowance.
4. The `ping` route needs no scope. Any valid key works.

What happens on every call

Checks run in this order: 1. Key present and valid (401). 2. Key not turned off (401). 3. Your plan includes the feature (402). 4. You are under the hourly limit (429). 5. The key has the scope the route needs (403).

Calls that fail the scope check still count towards your hourly limit.

Response headers

Every answer carries `X-Request-Id`. When a limit applies it also carries `X-RateLimit-Limit`, `X-RateLimit-Remaining` and `X-RateLimit-Reset` (a Unix time).

Tips

- Never put the key in a web page or app that customers can open.
- Keep keys in environment variables, not in code.
- Quote the `X-Request-Id` when you ask for help.
- Requests that change data may send an `Idempotency-Key`. See *Idempotency-Key*.

If something goes wrong

- 401 with `missing_key`: the header was not received. Some hosts strip it. The code also checks the server's redirect variable, but if your host removes it, ask them to pass the Authorization header through.
- 401 `invalid_key`: the key is mistyped.
- 401 `key_revoked`: it was turned off.

API routes reference (api/v1 and zap)

Every public route, its method, the scope it needs, and the filters it accepts.

All routes live under `/wp-json/dreamscaper/v1/`. Paths below are relative to `api/v1/` unless they start with `zap/`.

Routes

Method	Path	Scope needed
GET	`ping`	none
GET	`customers`	`read_customers`
POST	`customers`	`write_customers`
GET	`customers/{id}`	`read_customers`
PATCH, PUT or POST	`customers/{id}`	`write_customers`
POST	`leads`	`write_leads`
GET	`quotes`	`read_quotes`
GET	`quotes/{id}`	`read_quotes`
GET	`invoices`	`read_invoices`
GET	`invoices/{id}`	`read_invoices`
GET	`jobs`	`read_jobs`
GET	`jobs/{id}`	`read_jobs`
GET	`payments`	`read_payments`
GET	`webhooks`	`webhooks_manage`
POST	`webhooks`	`webhooks_manage`
DELETE	`webhooks/{id}`	`webhooks_manage`
GET	`zap/me`	none
POST	`zap/subscribe`	`webhooks_manage`
POST or DELETE	`zap/unsubscribe`	`webhooks_manage`
GET	`zap/poll/{event}`	none (see note)

For the Zapier sample route, an event name like `lead.created` is used. The code names a related scope per event, but the route itself is registered without one.

Lists and paging

Lists return newest first. - `limit`: 1 to 100. The default is 25. - `cursor`: pass the `next_cursor` from the previous answer. - The answer has `object: "list"`, `data`, `has_more` and `next_cursor`.

Filters

Route	Filters
customers	`stage` (lead, prospect, customer, past, lost), `email`, `phone`, `q` (name contains), `updated_since` (date like `2026-01-31T00:00:00Z`)
quotes	`status`, `customer_id`
invoices	`status`, `customer_id`
jobs	`status` (`not_started` or the job's status), `customer_id`
payments	`invoice_id`, `customer_id`

What counts as a job

A job is an accepted (signed) quote. Its progress is the quote's job status. Sample quotes are never listed.

Tips

- Use `updated_since` to pull only what changed.
- Everything is scoped to your business. A key can never see another business.
- Webhooks can be made by API, but the secret is shown only once on creation.

If something goes wrong

- 404 `not_found`: no record with that id for your business.

- 422 `invalid_limit` or `invalid_cursor`: fix the parameter, or start again without a cursor.
- 422 `invalid_stage` or `invalid_date`: use the allowed values.
- WordPress may answer 404 for a wrong path. Errors on these routes use the same JSON shape.

API request and response examples

Worked examples for listing, creating and updating customers and leads, with what comes back.

Examples use `curl`. Replace `YOUR_KEY` and `YOURSITE`. The base is `https://YOURSITE/wp-json/dreamscaper/v1/api/v1`.

List customers

```
curl "BASE/customers?limit=2&stage=lead" -H "Authorization: Bearer YOUR_KEY"
```

Answer (shortened):

```
{ "object": "list",
  "data": [ { "id": 41, "object": "customer", "stage": "lead", "name": "Pat Lee",
              "email": "pat@example.com", "phone": "...", "town": "...",
              "tags": [], "created": "2026-01-05T14:00:00Z" } ],
  "has_more": true, "next_cursor": "..." }
```

Pass `next_cursor` as `?cursor=` for the next page.

Add a lead

```
curl -X POST BASE/leads \
  -H "Authorization: Bearer YOUR_KEY" \
  -H "Content-Type: application/json" \
  -H "Idempotency-Key: web-form-1001" \
  -d '{"name":"Pat Lee","email":"pat@example.com","phone":"860-555-0100","message":"Need spring cleanup"}'
```

- Needs a name and at least an email, phone or address.
- `message` becomes the notes when notes is empty.
- `source` is an optional label (up to 20 characters). The default is `api`.
- A new lead returns **201**. If the person already exists (same email or phone), the existing record is filled in and you get **200** with `"duplicate": true` and `matched_on`.

Add a customer

```
curl -X POST BASE/customers -H "Authorization: Bearer YOUR_KEY" \
  -H "Content-Type: application/json" \
  -d '{"name":"Sam Roe","email":"sam@example.com","stage":"customer","on_duplicate":"return"}'
```

Fields accepted: `name`, `company`, `email`, `phone`, `address`, `town`, `state`, `zip`, `notes`, `tags`. - `stage` defaults to `customer`. - `on_duplicate` is `error` (default, returns 409), `return` (returns the existing record with 200) or `fill` (fills blanks, 200). - Success is **201**.

Update a customer

```
curl -X PATCH BASE/customers/41 -H "Authorization: Bearer YOUR_KEY" \
  -H "Content-Type: application/json" -d '{"phone":"860-555-0199","tags":["vip"]}'
```

Only the fields you send change. Sending none returns 422 `nothing_to_change`. An email or phone that belongs to another customer returns 409.

Notes about bodies

- Send JSON with `Content-Type: application/json`. Form bodies also work.
- A broken JSON body returns 400 `invalid_json`.

Tips

- Customers and leads created by a key are logged with the key's name.
- Customers made through the API with stage other than lead trigger a `customer.created` alert.

If something goes wrong

- 422 `invalid_lead` or `invalid_customer`: add the missing name or contact detail.

- 409 `duplicate_customer`: includes `existing_id` and `matched_on`.
- 402 `plan_limit`: your plan stopped adding more records.

API errors, 402 and 429, and rate limits

The standard error shape, each status code you may see, and how the hourly limit and Retry-After work.

Every error from the public routes has one shape.

```
{ "error": { "type": "permission_error", "code": "insufficient_scope",
             "message": "...", "status": 403, "request_id": "req_abc123" } }
```

Extra fields can appear, such as `param`, `required_scope`, `existing_id` or `retry_after`. WordPress's own errors on these routes (bad JSON, unknown route, missing parameter) are rewritten into the same shape.

Status codes

Status	Code examples	Meaning
400	`invalid_json`, `invalid_idempotency_key`	The request itself is broken.
401	`missing_key`, `invalid_key`, `key_revoked`	Key problem. A `WWW-Authenticate: Bearer` header is sent.
402	`feature_not_included`, plan codes, `plan_limit`	Your plan does not include this. May carry `upgrade_url`.
403	`insufficient_scope`	The key lacks the scope. `required_scope` is named.
404	`not_found`	No such record for your business.
409	`duplicate_customer`, `idempotency_in_progress`	A conflict.
422	`invalid_limit`, `invalid_stage`, `idempotency_key_reused`	A value is wrong.
429	`rate_limited`	Too many requests this hour.

The hourly limit

- Your plan sets requests per hour, shared by all your keys together. The number is a plan value and a placeholder, not approved.
- The window is a clock hour. It resets at the top of the hour, and `X-RateLimit-Reset` tells you when.
- Over the limit you get **429** with a **Retry-After** header (seconds) and `retry_after` in the body.
- If the plan gives 0 requests per hour, you get 402 `feature_not_included`.
- If the plan allows unlimited, no rate headers are sent.

Steps: handle 429 safely

1. Read `Retry-After`.
2. Wait that many seconds.
3. Retry the same request. For writes, reuse the same `Idempotency-Key`.

Tips

- Log `request_id` with every failure.
- Use `updated_since` and larger `limit` values (up to 100) to use fewer calls.
- Do not hammer after a 402. It will not fix itself until the plan changes.
- A 403 call still counts towards your limit.

If something goes wrong

- Constant 429: spread calls out, or ask for a plan with a higher limit.
- 401 right after making a key: re-copy it. Check for spaces.
- Many 404s: you may be calling a route outside `api/v1` or `zap`.

Idempotency-Key for safe retries

Add an Idempotency-Key header to writes so a retry never creates a duplicate.

If your connection drops after you send a write, you may not know whether it worked. An **Idempotency-Key** lets you send it again safely.

When to use it

Add it to any request that adds or changes data (POST, PUT, PATCH, DELETE). Reads do not need it.

Steps

1. Pick a unique string for each real action. It can be 1 to 100 visible characters. For example, your own order number.
2. Send it as a header: `Idempotency-Key: order-1001-lead`.
3. If the call fails in the network, send the exact same request again with the same key.
4. If the first call worked, you get the first answer again, with a header `Idempotent-Replay: true`.

The rules

Situation	Result
First use of the key	The request runs and its answer is saved.
Same key, same request	The saved answer is replayed.
Same key, different request	**422** `idempotency_key_reused`.
Same key while the first is still running	**409** `idempotency_in_progress`. Wait and retry.
Key has bad characters or is too long	**400** `invalid_idempotency_key`.

Two requests are the same when the method, route and body match.

What is saved

Only successful answers (200 to 299) are saved. If the first try fails, the key is released, so a fixed retry can run again.

Saved keys are removed after about 24 hours (daily housekeeping). Keys are kept separately per access key.

Tips

- Customers and leads are also protected by matching. A person with the same email or phone is never added twice. Idempotency adds protection for other fields and for repeat responses.
- Generate the key before sending, not after.
- Do not reuse the same key for a different record.

If something goes wrong

- 422 on a retry: you changed the body. Send the original body or use a new key.
- 409 keeps coming: the first call may be stuck. Wait a minute and retry.
- Replay answer looks old: that is expected. It is the first answer.

Alerts (webhooks): setup and events

Add an alert address, choose events like lead.created or invoice.paid, and copy the signing secret.

An alert sends a short signed message to a web address when something happens in VisionScaper.

Before you start

- A public `https://` address that can receive POST requests (your own server, or a service such as Zapier).
- Plan inclusion for Connect other tools.

Steps

1. Open **Settings → Zapier & API keys** and the tab **Alerts to other tools**.
2. In **Add an alert**, type the address into **Send alerts to this address**. It must start with `https://`, be under 500 characters, and be a public website.
3. Under **Tell it when…**, tick the events you want.
4. Press **Add alert**.
5. Copy the signing secret from the box **Copy the signing secret now**. It starts with `whsec_` and is shown only once.
6. Press **I have saved it**.
7. On the alert, press **Send a test**. The toast tells you whether the other side answered and with which code.

The events

Event	Tick box wording	When it fires
`lead.created`	A new lead comes in	As the lead arrives
`customer.created`	A customer is added	Found by the background check
`quote.sent`	A quote is sent	Found by the background check
`quote.accepted`	A quote is accepted (signed)	Found by the background check
`job.completed`	A job is marked done	Found by the background check
`invoice.paid`	An invoice is paid	Found by the background check

Lead alerts go out as the lead arrives. The others are found by a check that runs about every 5 minutes (and soon after a signed-in change), so they can be up to about 5 minutes late. Customers brought in by a bulk import or a sync are not announced.

What is sent

```
{ "id": "evt_123", "object": "event", "type": "invoice.paid",
  "created": "2026-01-05T14:00:00Z",
  "data": { "object": { "object": "invoice", "id": 7, "number": "...", "status": "paid", "amount": 0 } } }
```

The `data.object` is the same customer, quote, invoice or job shape the API returns.

Headers on each POST: `Content-Type: application/json`, `User-Agent: VisionScaper-Webhooks/1`, `X-VisionScaper-Event`, `X-VisionScaper-Delivery`, `X-VisionScaper-Attempt` and `X-VisionScaper-Signature`.

Managing alerts

Each alert row has **Send a test**, turn on or off, a log button, a new-secret button (the old secret stops working), and **Remove**. Limit: 25 alerts per business.

Tips

- Answer with any 2xx status quickly. The timeout is about 8 seconds.
- Each event is recorded once, so a re-check cannot send it twice. A quote sent again later can be a new event.
- Local, private and unresolvable addresses are refused, and redirects are not followed.

If something goes wrong

- "That address can't be reached from the internet." Use a public address.
- "The address must start with https://".
- "Choose at least one thing to be told about."

- "You have 25 alerts set up." Remove one first.

Verifying an alert's HMAC-SHA256 signature

Check that an alert really came from VisionScaper using the X-VisionScaper-Signature header and your secret, with PHP, Node and Python examples.

Anyone can send a POST to your address. The signature proves it came from VisionScaper.

How it is built

Each alert carries this header:

```
X-VisionScaper-Signature: t=1767621600,v1=9f2c...
```

- `t` is a Unix time in seconds.
- `v1` is the lowercase hex of **HMAC-SHA256** over the string `t + "." + raw body`, keyed with the alert's secret (`whsec_...`).

Steps to verify

1. Read the **raw** request body. Do not parse and re-encode it first.
2. Read the header. Split it on the comma to get `t` and `v1`.
3. Compute `HMAC-SHA256(secret, t + "." + body)` as hex.
4. Compare it to `v1` in constant time.
5. Reject if `t` is more than 5 minutes (300 seconds) from your clock.
6. Only then trust and parse the JSON.

PHP

```
$raw = file_get_contents('php://input');
[$t, $v] = array_map(fn($p) => explode('=', $p, 2)[1],
  explode(',', $_SERVER['HTTP_X_VISIONSCAPER_SIGNATURE']));
$ok = hash_equals(hash_hmac('sha256', $t . '.' . $raw, $secret), $v)
   && abs(time() - (int)$t) < 300;
if (!$ok) { http_response_code(400); exit; }
```

Node.js

```
const crypto = require('crypto');
function verify(rawBody, header, secret) {
  const parts = Object.fromEntries(header.split(',').map(p => p.split('=')));
  const mac = crypto.createHmac('sha256', secret)
    .update(parts.t + '.' + rawBody).digest('hex');
  const same = mac.length === parts.v1.length &&
    crypto.timingSafeEqual(Buffer.from(mac), Buffer.from(parts.v1));
  return same && Math.abs(Date.now()/1000 - Number(parts.t)) < 300;
}
```

Python

```
import hmac, hashlib, time
def verify(raw: bytes, header: str, secret: str) -> bool:
    d = dict(p.split('=', 1) for p in header.split(','))
    mac = hmac.new(secret.encode(), (d['t'] + '.').encode() + raw, hashlib.sha256).hexdigest()
    return hmac.compare_digest(mac, d['v1']) and abs(time.time() - int(d['t'])) < 300
```

(The Node and Python examples follow the same rule as the PHP one in the product notes. They were not run here.)

Tips

- Keep the secret out of source control.
- Use the delivery id (`X-VisionScaper-Delivery`) and event id to ignore repeats.
- A new secret can be made from the alert. The old one stops working at once. Update your receiver first, then rotate.
- A fresh timestamp is sent on each retry, so the 5-minute rule works for retries.

If something goes wrong

- Signatures never match: you probably hashed a re-encoded body. Use the raw bytes.
- Only some fail: check clock drift on your server.
- Header missing: the request was not from VisionScaper.

Alert retries, auto-disable and delivery logs

How failed alerts are retried, when an alert switches itself off, and how to read the log and send again.

VisionScaper keeps trying when your receiver is down. It stops when it is clear nobody is listening.

What counts as success

Any HTTP 2xx answer. Anything else, a timeout, or no answer is a failure.

Retry schedule

After failed try	Wait before the next
1	1 minute
2	5 minutes
3	30 minutes
4	2 hours
5	6 hours

There are at most 6 tries per delivery. After the sixth, the delivery is marked **Gave up**.

Switching off automatically

- After **10 failed tries in a row** for one alert, the alert is switched off and a note is made. You are told, and the message says to fix the address and turn it back on.
- If the receiver answers **410**, the alert is switched off at once and that delivery is not retried. Zapier does this when a Zap is turned off.
- A success resets the count.
- Tests never count towards switching off.

Reading the log

1. Open **Alerts to other tools**.
2. Press the log button on an alert.
3. Each row shows when, what, and the result: **Worked**, **Will try again (n so far)**, **Gave up: reason**, or a skip reason.

The log shows the last 50 tries. Old finished entries are cleaned up after 30 days.

Sending again

1. Turn the alert back on first, if it is off.
2. On a **Gave up** row, press the retry button. Only a failed alert can be sent again.
3. It restarts with a fresh set of tries. Test entries cannot be retried.

Background work

Retries use WordPress scheduled events. A sweep also runs each 5 minutes and sends anything overdue, and frees deliveries stuck in "sending". If WordPress cron is not running, retries are late. See *Cron, caching, SSL and REST troubleshooting*.

Tips

- Return 200 fast and do slow work afterwards.
- Check the delivery attempt number in `X-VisionScaper-Attempt`.
- If your plan stops including the feature, deliveries are skipped with "Your plan does not include this right now."

If something goes wrong

- "The other side answered 500": fix your receiver, then retry.
- "That address is not a public website.": the host resolves to a private address.
- Nothing sent at all: no one is subscribed to that event, or the alert is off.

Connecting Zapier (triggers and actions)

VisionScaper has no published Zapier app. Connect with Webhooks by Zapier or your own private app, using an access key.

The screen states that a published Zapier app is not offered. You can still connect Zapier yourself.

Before you start

- A Zapier account.
- A VisionScaper access key with **Set up alerts (needed by Zapier)** ticked, plus whatever you want to read or add.

Simplest way: Webhooks by Zapier

1. In VisionScaper, make a key named "Zapier" (see *Creating access keys and choosing scopes*).
2. In a Zap, add a step with **Webhooks by Zapier** and choose **Custom Request**.
3. For a read (an action), use `GET .../api/v1/customers` with header `Authorization: Bearer YOUR_KEY`.
4. To add a lead, send a `POST` to `.../api/v1/leads` with JSON.

Your own private Zapier app

Use Zapier's Visual Builder or Platform CLI. 1. For the login test, call `GET zap/me`. 2. For instant triggers, call `POST zap/subscribe` with `event` and `target_url` (Zapier's `hookUrl` is accepted too). Needs the alerts scope. The reply includes the alert `id` and a `secret`. 3. When the Zap is turned off, call `POST zap/unsubscribe` with `{ "id": ... }`. 4. For polling triggers and for test samples, call `GET zap/poll/{event}`.

The addresses to copy are on the **Zapier** tab: **Subscribe address**, **Unsubscribe address**, and **Sample address** (add the event name).

Triggers you can use

`lead.created`, `customer.created`, `quote.sent`, `quote.accepted`, `job.completed`, `invoice.paid`.

How the helper routes behave

- Subscribing twice with the same event and address returns the same alert. Nothing is doubled.
- A subscription made this way is marked **From Zapier** in the alert list.
- `zap/poll/{event}` returns a plain list of the newest real records (up to 25), newest first, each with an `id`. If you have none yet, it returns one clearly marked sample.
- A Zapier alert switches off when Zapier answers 410.

Actions you can build

- Add a lead: `POST api/v1/leads`.
- Add or update a customer: `POST api/v1/customers`, `PATCH api/v1/customers/{id}`.
- Search customers: `GET api/v1/customers?email=...`.

Tips

- Test each trigger with the sample address before turning the Zap on.
- Alerts that are not from the instant route may arrive up to about 5 minutes late.
- Keep the Zapier key's scopes small.

If something goes wrong

- 403 on subscribe: the key lacks the alerts scope.
- 422 `invalid_event`: use one of the six event names.
- 422 `invalid_target_url`: Zapier's address must be a public https address.
- Nothing triggers: check the Zap's alert is on, and see the log.
- Real Zapier delivery was not tested here.

Security: two-step sign-in, login history and signing out devices

Turn on authenticator-app sign-in, keep recovery codes, review sign-in history, and recover if you are locked out.

Find this at **Settings → Security** in the Contractor Hub.

Turn on two-step sign-in

1. Open **Settings → Security**. In the **Two-step sign-in** card, type your password under **Your password, to begin**.
2. Press **Set up two-step sign-in**.
3. Open an authenticator app (such as Google Authenticator, Microsoft Authenticator or Authy). Add a new account.
4. Scan the picture, or choose "enter a key" and type the key shown. The key is shown once.
5. Type the 6-digit code under **Code from the app** and press **Turn on**.
6. **Your recovery codes** appear. There are 10. Press **Copy**, **Download** or **Print**.
7. Tick "I have saved these codes somewhere safe" and press **Done**.

If the card warns that the website cannot keep the key safe, ask your host to turn on PHP OpenSSL.

Signing in afterwards

Type your password and then the 6-digit code (or a recovery code). Each recovery code works once. The code covers the WordPress sign-in page, the VisionScaper website sign-in, and the phone app sign-in. The Security screen has a card **Where two-step sign-in applies** that marks each path as Covered or Not covered. Application passwords and XML-RPC are not covered, nor are sessions already signed in before you turned it on.

Lockouts

Five wrong codes in 15 minutes pause sign-in for 15 minutes.

Make new recovery codes or turn it off

Type your password and a current code (or a recovery code). Press **Make new recovery codes** (the old ones stop) or **Turn off**.

Require it for managers

Owners can tick **Require it for managers** and press **Save**. A manager without it can open only the Security screen until they set it up. The owner is never blocked.

Your team

If a team member lost their phone and codes, press **Reset** beside their name, type your own password, and press **Reset two-step**. They are signed out everywhere and can set it up again.

Sign-in history and activity

- **Sign-in history** is kept for 90 days. Addresses are shortened on purpose. Filter by result and, for owners, by person. Press **Download list** for a CSV.
- **Account activity** shows who changed what: reviews, library, security, your data, automations, training, messages and calls, billing and sign-ins. Filter by area, person, words and dates, and download the list.
- **Sign out other devices** ends every other browser and phone sign-in.

If you are locked out

1. Use a recovery code.
2. Another administrator can reset your two-step.
3. A site administrator can add `define( 'DREAMSCAPER_DISABLE_2FA', true );` to `wp-config.php`. That switches off every second step on the whole site. Sign in, fix things, then remove the line.

Tips

- Store recovery codes away from your phone.
- Make new codes when you are down to 3 or fewer.
- Customers with two-step on cannot use Google or Facebook sign-in. They use password plus code.

If something goes wrong

- "That code was already used": wait for the next 30-second code.
- Codes always fail: check your phone's clock is automatic.

Customer records, data export, erasing and privacy requests

How contractor-only records work, how to export or erase data, how customers delete their account, and GDPR-style requests.

This article is plain-language help. It is not legal advice. Ask a lawyer or accountant what you must do.

Contractor-only customer records

Approved contractors can note factual events about a customer they worked with. Types in the code: - Invoice unpaid 60+ days. - Paid 30+ days late. - Payment reversed / charged back. - Cancelled within 24 hours. - No-show / no access at a booked visit. - Cancelled after materials were ordered.

Rules built in: - Each record must be tied to a real invoice, appointment or quote in that contractor's account. - A record expires after 24 months. - Another contractor sees only a short summary, and only for a customer already in their own CRM. They never see who recorded it. - Customers are matched by hashed email, phone and address. The raw details are not shared. - Every view is logged. Contractors must accept the records rules first. - A daily check suggests records from late invoices. The contractor confirms them before anything is shared.

Site owner: look up and dispute

1. In WordPress admin, open **Settings → VisionScaper Records**.
2. Search by a full email or a 10-digit phone number.
3. For each record, pick **Disputed (hide)**, **Active**, or **Removed**, add a reason, and press the button. Disputed records are hidden until set to Active. Removed records are never shown again.

Export personal data (WordPress tool)

WordPress **Tools → Export Personal Data** includes these records for a customer's email, under the group "Records made by contractors".

A business exports or erases its own data

Under **Settings → Your data** in the Contractor Hub (owner only): 1. **Download a copy of your data**: type your password and press the request button. A ZIP with CSV and JSON files is made. Large accounts build in the background and an email says when ready. The link lasts 7 days and needs the owner signed in. Passwords, secret keys and private links are left out. 2. **Erase my account**: type your password and the exact phrase shown. It starts a 14-day wait. A cancel link is emailed. After the wait, a daily job erases. 3. Money records are kept for the retention period, with names and details removed. The default is 7 years, a placeholder, not approved. Confirm with your accountant. 4. **A customer asked to be forgotten**: search for the customer, review what is erased and kept, type your password and the word shown. Their details, notes and messages are erased. Invoice totals stay. Their email and phone go on the do-not-contact list.

Customers deleting their own account

In the Designer, the account menu has **Delete account**. It removes the account and every design saved online. Designs on the device stay. Staff accounts cannot be deleted this way.

Tips

- Answer privacy requests quickly. Keep notes of what you did.
- Do the export before any erase.

If something goes wrong

- Link expired: request a new copy.
- Erase started by mistake: use the cancel link or button before the wait ends.

Cron, WP-CLI, caching, SSL and REST troubleshooting (401, 403, 404)

Keep scheduled jobs running, avoid cache problems, require https, and fix REST 401, 403 and 404 errors.

Cron (scheduled jobs)

VisionScaper uses WordPress cron. It drives alerts, reminders, marketing sends, syncs, erase requests and housekeeping.

Hook	How often
`dreamscaper_crm_tick`	every 5 minutes (the main tick: follow-ups, alert checks)
`dreamscaper_int_hourly`	hourly (Google Contacts and QuickBooks syncs)
`dreamscaper_ops_cron`, `dreamscaper_tr_daily`, `dreamscaper_subs_daily`	hourly
`dreamscaper_data_daily`, `dreamscaper_sec_daily`, `dreamscaper_msg_daily`	daily
`dreamscaper_postcard_tick`	every 5 minutes

WordPress only runs jobs when someone visits. For dependable timing, add a real server cron every 5 minutes: `wget -q -O - https://YOURSITE/wp-cron.php?doing_wp_cron >/dev/null 2>&1`, and add `define( 'DISABLE_WP_CRON', true );` to `wp-config.php`. The Marketing page shows this advice when its last run is old.

WP-CLI

The plugin adds no commands of its own (none found in the code). You can use WordPress's own, for example `wp cron event list` and `wp cron event run dreamscaper_crm_tick`. Not tested here.

Caching

- Do not cache `/wp-json/` or pages using `?dreamscaper_oauth=`, `?ds_ics=` or `?ds_tile=`.
- Many plugin responses send no-cache headers. Map tiles are cached on purpose.
- Exclude the Designer and Hub pages from page caching if screens look stale.
- After changing a key or a switch, clear your cache.

SSL (https)

- Use `https://` on the live site. Alerts must go to `https://` addresses. OSRM must be `https://`.
- Sign-in cookies are set secure when the site is on https.
- Provider webhooks (Stripe, Twilio, Retell and others) need a public https address.

REST troubleshooting

401 Unauthorized - API keys: missing, mistyped or turned-off key. See *API errors and rate limits*. - Signed-in screens: your login session ended. Sign in again. - The Authorization header is stripped by your host. Ask them to pass it through.

403 Forbidden - API keys: the key lacks the scope named in `required_scope`. - Alert answers 403 "Bad signature" (messaging webhooks): the webhook secret is wrong. - A security plugin or firewall is blocking `/wp-json/`.

404 Not Found 1. Save **Settings → Permalinks** once to refresh rules. 2. Try `?rest_route=/dreamscaper/v1/api/v1/ping`. 3. Check the path: `/wp-json/dreamscaper/v1/api/v1/...`. 4. Check the record exists for your business.

Tips

- Keep PHP OpenSSL enabled. It stores secrets.
- Quote `X-Request-Id` when asking for help.

If something goes wrong

Alerts late or reminders missing almost always means cron is not firing. Fix cron first.

Apps, community & FAQ

Phone app, community, homeowner tools, FAQ and troubleshooting.

The VisionScaper phone app: what it does

What the iPhone and Android app is for, who sees what, what works offline, and what the site owner must do to get it built.

The VisionScaper phone app is the field and office companion to the Contractor Hub on your website. It is built with React Native and Expo and draws real phone screens, not a website inside an app. Your website stays the one source of truth. The app has no database of its own.

What the app keeps on the phone

- A copy of the person's next days of jobs, so they can keep working with no signal.
- An outbox of taps the website has not confirmed yet. Unsent or refused changes are always shown on screen.

Some things are never queued offline: customer, lead, schedule and route changes, plus anything that sends a message or touches money. Offline, those screens say so. This is deliberate, so a retry hours later cannot overwrite someone else's change.

Two modes

The website decides which phone a person gets, from their team role.

Role	Phone shows
Crew or crew leader	Three tabs: **My day**, **Time**, and **Messages** (only if the owner allows messages for that role)
Owner, manager and other office roles	Five places: **Today**, **Clients**, **Work**, **Money**, **More** (the same names as the Contractor Hub menu)

Which tabs an office person sees also depends on their permissions and on the "Show me" Simple or Full setting. Details are in the related articles.

What the app can do

- Jobs by day, a running timer, status buttons, checklists, photos, materials and issue reports (see [crew-app-my-day-time-messages]).
- Customers, properties, new leads, the calendar and dispatch (see [phone-app-clients-schedule-dispatch]).
- Quotes, invoices, payments received and expenses (see [phone-app-quotes-invoices-money]).
- Tasks, reports and weather (see [phone-app-tasks]).
- Approving customer messages and voice notes (see [phone-app-customer-messages-and-voice-notes]).

Work the app does not do yet opens in the Contractor Hub in a signed-in browser.

For the site owner: getting the app built

You do not build the app inside WordPress. The app's source folder has a file called BUILD.md that walks through it. In short: 1. You need an Expo account (builds run on Expo's servers, so no Mac is needed). 2. An iPhone install or App Store release needs an Apple Developer account. Google Play needs a Google Play Console account. Follow each company's current sign-up instructions and check current fees. 3. Builds are started with the `eas build` command, for example `eas build -p android --profile preview`. BUILD.md lists the profiles. 4. Push notifications go through Expo to Apple and Google. In WordPress go to **Settings → VisionScaper**, find **Mobile app (push notifications)**, and paste an Expo access token only if "enhanced push security" is turned on in your Expo project. Otherwise leave it blank.

> Note: when BUILD.md was written it said no installable build had been made and nothing had been run on a real phone. Check the file for the current status before you promise the app to your crew. (Not verified in code.)
>
> Warning: the launch checklist says the app's bundle ID and site address must be settled before the first store submission, because they cannot change afterward.

Tips

- Turn on the optional AI features on the same settings screen only if you want them: **Voice-note summaries**, **Estimate from a recorded walk**, and **Automatic payments (autopay)**. Each is off until you tick it.
- Tell your crew the phone needs an https website to sign in.

If something goes wrong

- A screen is missing: the app hides screens the website's plugin version cannot serve, and screens the person's role cannot use. Check the plugin is current and the role's permissions.
- Sign-in trouble: see [phone-app-sign-in-and-devices].

Signing in to the phone app and managing signed-in phones

How phone sign-in works, how long it lasts, how to sign out a lost phone, and what the notification switches do.

Each person signs in to the phone app with the same email (or username) and password they use on your website. The phone then gets its own key, so the password is not kept on the phone.

Before you start

- Your website must use https. If it does not, the app says: "Phone sign-in needs a secure (https) website."
- The person needs a login on your site and, for crew, to be on your team list. A person who is not on a team gets a message explaining why.

Steps: sign in

1. Open the app.
2. Enter your email (or username) and password.
3. Tap sign in.

The website returns a key once. It is stored in the iPhone Keychain or the Android Keystore. Only a scrambled (hashed) copy is kept on the website.

How long it lasts

- The key expires after 90 days without use. Each time you use the app, the 90 days start again (the website records "last seen" at most every 10 minutes).
- Removing someone from your team ends their access at their next request.
- If the key is no longer valid, the app shows: "Your sign-in on this device has ended. Please sign in again."

Steps: sign out a phone you no longer have

1. Open the app and go to **Settings** (the menu path to it is not verified in code; look under More).
2. Find the list of signed-in phones.
3. Tap **Sign out** next to the phone's name and confirm.

Owners, and anyone with the team-management permission, also see their team's phones in this list and can sign them out. The owner's own device cannot be signed out by someone else. The signed-out phone must enter the password again; anything it has not sent yet stays on it until then.

Notification switches

Settings has four switches per phone:

Switch	When it fires
Schedule changes	A job is added, moved or cancelled for you
Job updates	A job you are on is sent back, approved or needs follow-up
Time and hours worked	You may have forgotten to clock out, or your week was approved or sent back
Office alerts	Managers: issues from the field, blocked jobs, work waiting for approval

The app asks the phone for permission to send notifications only when the person turns them on. If notifications are blocked in the phone's settings, the app shows a banner with a button to open them. Tapping a notification opens the job or timesheet.

Tips

- Signing out warns you if there is unsent work, and offers "Sign out and delete unsent work".
- Sign out a lost phone before anything else, then change the website password.

If something goes wrong

What you see	What it means
"Enter your email (or username) and password."	One box was empty.
"That email and password don't match an account here."	Wrong details. Use "Forgot password" on the website.
"Too many tries. Wait 15 minutes and try again."	More than 10 failed tries from one internet address in 15 minutes.

What you see	What it means
"Phone sign-in needs a secure (https) website."	The site address starts with http. Ask your web host to enable https.

The crew app: My day, Time and Messages

What a crew member or crew leader sees on the phone, how job status buttons work, and who they can message.

Crew members and crew leaders get a deliberately small phone: three tabs. Nothing on it shows a price. Jobs come from the same field routes as before, which already leave money out.

The three tabs

- **My day**: your jobs, by day.
- **Time**: your week of hours.
- **Messages**: chat with the office. This tab only appears if the owner allows it for your role (the permission is "Send and read messages with the office (crew app)").

Everything else in the app stays reachable only by its old address, so a crew phone stays simple.

My day

- Jobs are listed by day with a running timer and a "clock in without a job" option.
- A map shows jobs that have a stored map point. Nothing is guessed. Jobs without a point are listed only.
- The connection line and any unsent or refused changes are always visible.

Job status buttons

On a job you will see: **On my way** (it can send the customer a text or email from your Contractor Hub template), **Arrived**, **Start**, **Pause**, **Resume**, **Blocked** (asks for a reason), **Needs follow-up** (asks for a reason) and **Finish**. Required checklist items must be done first. A manager can override with a reason. **Approve**, **Send back** and **Reopen** show only if the website allows them for that person.

The job packet

Work scope, included and excluded items, instructions, equipment, proposal sections and site notes (gate, pets, utilities, irrigation). You can open directions in Apple Maps, Google Maps or Waze, and call or text the customer.

Checklists, photos, materials and issues

- Checklists and forms support tasks, yes/no, numbers, short answers, pick-one, photo items, signatures and conditional questions. Each item can take a note or a "can't do this" reason.
- Photos come from the camera or library, are shrunk on the phone to 2048 px JPEG, wait on the phone until uploaded, and are sorted as before, progress, after or damage.
- Materials can be recorded as used or bought.
- Issue reports (with a photo) alert the office and can mark the job blocked.
- Crew leaders have a **Crew clock** to clock several people in or out in one tap. Each person gets their own time entry, marked as entered by the leader.

Time

A week view with totals. You can correct entries with a reason, add missed time, and submit the week. Approved weeks are locked by the website.

Messages

- Crew and leaders can write to the office (the owner and managers) and nobody else. The office can write to anyone on the team who has a login.
- These are the company's own team threads, the same ones the Hub's Messages screen shows the office. Customer threads are never listed.
- A message is limited to 1000 characters ("Keep it under 1000 characters. Send it as two messages."), and an empty message is refused ("Write a message first.").
- If you send very fast you may see: "You're sending messages very quickly. Please wait a few minutes." (120 messages an hour.)
- A retry never sends twice: each message carries a one-time code.
- Opening a conversation marks it read. The tab shows an unread badge.

Tips

- The owner can switch crew messages off per role in the team permissions.
- Take the before photo first. The upload waits if you have no signal.

If something goes wrong

- "Messages are switched off for your role. Ask the owner." The owner turned the permission off.
- "You can't message this person from here." Crew can only message owner and managers.
- A job will not finish: a required checklist item is missing. Complete it or ask a manager to override.

Tasks, reports and weather on the phone

Add, assign and finish tasks from the phone, run the phone reports with drill-down and CSV, and see the weather.

Tasks are one list of to-dos for the company. The phone and the Contractor Hub read the same list, so a task you add in either place shows in both.

Who can do what

- Everyone can add a task for themselves, and can see, finish and edit tasks that are assigned to them or that they created.
- Seeing and assigning everyone's tasks needs the permission "See and assign everyone's tasks". Managers have it by default. Owners can change this in the team permissions.

Steps: add a task on the phone

1. Open the tasks list and choose to add a task (the exact button label is not verified in code). The screen is called **Add task**.
2. Type a title.
3. Optionally add details, a due date and time, a priority (**Normal** or **High**), and who it is for.
4. Optionally link a job or customer.
5. Save. You will see "Task added."

A person who gets a task assigned receives a push notification titled "New task".

Steps: finish, edit or remove

1. Open the task. The edit screen is called **Edit task**.
2. Tick it off when done, or change any field and save.
3. To delete, choose remove and confirm "Remove this task?". You will see "Task removed." The task is marked removed, not erased from the database.

If someone else changed the task first, the phone refuses your save and reloads it, so nothing is overwritten.

The Hub's Tasks screen

In the Contractor Hub the same list is at Work, Field Ops, Tasks. Its tabs are **Mine**, **Team**, **Due today**, **Past due** and **Done**, with a search box.

Phone reports

Reports reuse existing permissions. They are in **Money → Reports** on the phone:

Report	Needs
Money received, Invoiced, Unpaid invoices by age	See quotes, invoices and payments with amounts
Expenses (approved)	The same, or expense approval
Job profit	Finance view
Tasks by person	See and assign everyone's tasks

Pick a date range (default the last 90 days, at most 400). Tap any line to see the exact records behind it. **Export as CSV** sends the same rows, so the screen and the file cannot disagree. Text that starts with = + - or @ is made safe so a spreadsheet cannot run it.

Weather

Weather comes from the US National Weather Service. It needs no key, but it works for US locations only.

Tips

- Use a due time for jobs that depend on timing, like a delivery.
- The "+" quick-add button also creates tasks.

If something goes wrong

- "This task is gone (or isn't yours)." It was removed, or you cannot see it.

- "No internet connection. Open a task when you're back online." Opening an existing task needs a connection. Adding a task can wait in the outbox.
- A report is missing: you lack the permission listed above.

Customers, schedule and dispatch on the phone

Search customers, add leads with a duplicate check, view the calendar, dispatch and reschedule jobs, and plan a route from the phone.

Office roles (owner, managers) get **Clients** and **Work** places in the app. The website decides what each person may see or change. The app only hides buttons. The website refuses anyway.

Before you start

- The website plugin must be new enough to serve these screens. An older plugin makes the app behave like its first version.
- Customer, lead, schedule and route changes need a connection. They are not saved in the offline outbox.

Clients

- Search as you type, filter by stage, and use "show more" for more results.
- **Search everything** looks across customers, property addresses, jobs, and quotes by number or title.
- A customer page shows contact details, call, text, email and directions buttons, notes, properties (gate, pets, irrigation, utilities, best time, maintenance), visits and quotes. Quotes show names and status. Amounts stay in the Hub unless the person may see money.
- Edits to a customer, notes or a property carry the version the phone read. If someone else changed it first, the website refuses and the app reloads it. Nothing is overwritten.

Who sees which customers

Permission	Effect
See every customer	All customers. Without it, only customers on jobs you are assigned to, plus leads you added
Edit customers and properties	Change them
Add leads	Create a new lead
Phone numbers and emails, private notes, budget	Each has its own permission. A hidden field also cannot be searched

Steps: add a new lead

1. Open **Clients** and start a new lead.
2. Enter the details.
3. Before saving, the website checks for a duplicate: same phone, same email, same address, or same name plus town.
4. If it finds matches, choose "add to this customer" or "new customer". Nothing is merged automatically.

A retried save returns the same lead instead of making a second one.

Work: the schedule

- View **Day**, **Week** or **Month**. Office roles can switch between **Everyone** and **Just me**. Time off is listed on the day.
- Office roles tap a visit to open **Dispatch**.

Steps: dispatch a job

1. Tap the visit.
2. Choose the people.
3. Change the day, start and end with the big minus and plus buttons.
4. Watch the conflicts appear live: double-booked, time off, not a working day, or outside hours.
5. Save. Conflicts are warnings. Going ahead needs a written reason, which is saved on the job's history.

A person who is switched off can never be assigned. If someone already moved or reassigned the job, your change is refused rather than overwriting theirs.

Repeating jobs

When you change or skip a repeating job, choose **just this one**, **this and later**, or **all upcoming**. Finished, cancelled and already-started visits are left alone, and the app says how many. **Tell the customer** sends one notice for the next upcoming visit.

Route (per person, per day)

Plan best order asks the website. Drive minutes show only when Google (with a server key set) or your own OSRM server actually measured them. Without either, the order is a straight-line estimate and the screen says "Estimate only" with no minutes. Stops with no

saved map point are listed as left out, never guessed. Saving an order stores it.

Field tools

Door to door, Measure, Landscape plans and the Route planner are separate permissions (canvass, measure, plans view, planner). Measurements are worked out by the website from the points the phone traces. Areas over 40 acres, lines over 20,000 ft and points more than 3 miles from the property are refused as mistakes. Plans on the phone show shapes only, never prices. "Show me: Simple" hides several of these tools until you switch them on.

If something goes wrong

- "Nothing happens when I save": you may be offline. These changes need a connection.
- A save is refused after you waited: someone else changed it first. Reopen it and try again.

Quotes, invoices, payments and expenses on the phone

Start a quote on site, send quotes and invoices, record payments received, add expenses, and use the get-paid tools.

The **Money** place in the app shows quotes, invoices, payments and expenses. The phone never works out a price, tax or balance. Every figure comes from your Contractor Hub.

Who sees Money

Each action has its own permission:

Permission	Lets a person
See quotes, invoices and payments with amounts	View them (owner and managers by default)
Start a draft	Start a quote draft, or an invoice from a signed quote
Send	Send a quote or invoice to the customer
Record a payment	Record a payment received outside the website (cash, check, other) and correct one with a reason
Add an expense	Add an expense
Approve expenses	Approve or reject expenses

The Money screen has sections **Overview**, **Quotes**, **Invoices**, **Expenses** and **Reports**, shown according to your permissions.

Steps: start a quote on site

1. Tap **+ New quote**.
2. Search for the customer and tap them.
3. A draft starts. The app says: "Draft started. Build the estimate in the Contractor Hub, then send it from here."
4. Build the estimate in the Hub. The Hub decides the price.
5. Send it from the quote screen.

A retried tap makes one draft, not two.

Record a payment

Card payments are not taken on the phone. You record money you received another way. The website's own payment link (Stripe) is unchanged. Recording a payment can be done offline and is saved once.

Expenses

Add an expense and its receipt. It waits for approval, except when the person can approve, in which case it is approved at once. Expenses can be queued offline.

Get paid tools (Overview)

- **Who owes you**: tiles for current, 1-30, 31-60, 61-90 and 90+ days, then customers. Tap a customer for their open invoices, **Send reminder** (about one per invoice per day) and **Send statement** (emailed with a pay link).
- **Invoice finished jobs**: pick finished, priced jobs, make one draft each (or one per customer), review, then send.
- **Payment schedule** on a quote: a deposit percentage and stages. **Invoice next** makes a draft from the next stage. Signing never charges a card.
- **Change orders** on a quote: unsigned ones say "Not counted yet". Signed ones update the agreed price. They are voided with a reason, never deleted.
- **Autopay**: on an invoice, "Charge on the due date". The customer saves a card or bank account on Stripe's page from My Projects. The phone never sees a card number. The whole feature is off until the owner ticks **Automatic payments (autopay)** in **Settings → VisionScaper**.
- **Payroll export**: pick a Monday-to-Sunday week and share a CSV of approved timesheets. Weeks not approved are held back. It is off for managers by default.

One rule sits under all invoicing: the invoices made for a quote can never add up to more than the quote total plus signed change orders.

Walk estimate

If the owner switches on **Estimate from a recorded walk** in Settings, a person can dictate a property walk and review a DRAFT quote. It only uses your own services, rates and measured areas. A person reviews every line. The AI never sets a price.

Tips

- Send reminders and statements from the app. Each carries a one-time code so a double tap cannot email twice.
- A quote edit shows a version. If it changed, the phone reloads it.

If something goes wrong

- A button is missing: you lack that permission.
- "No connection. Nothing was created." Quotes and sends need a connection.
- A stale edit is refused with a conflict. Reopen and retry.

Customer messages, field triggers and voice notes on the phone

Approve the messages your automations prepare, set field triggers, and dictate job notes with optional AI summaries.

The Contractor Hub prepares customer messages from your automations. The phone does not write to customers by itself. It lets a person look at what was prepared and say yes or no.

Who can use it

The permission is "Approve messages..." (owners and managers by default; leaders and crew no). The website refuses crew even if they ask directly.

Steps: approve messages

1. On **Today**, open **Messages to customers**.
2. Review the messages set to "ask me first". Approve or reject each.
3. Review follow-ups for sent quotes and due or late invoices. Choose **send reminder now**. Only one reminder per 24 hours goes out unless you choose **Send anyway**.
4. Review review requests and referral asks.

Everything here needs a connection. A message is never queued on the phone. A retried tap uses the same code, so the customer is never messaged twice. Customer messages follow the same consent, quiet-hours and opt-out rules as all other messages.

Field triggers

A field trigger is a rule you set: when a field event happens, do something.

- Events: job finished, needs a return visit, issue reported, expense approved, task overdue.
- Actions: make a task, alert the managers, or message the customer.
- A customer message from a trigger is prepared "ask me first" by default.
- Each event fires at most once.

Voice notes

Each job has a **Job note** card. 1. Tap the box and dictate with your keyboard's microphone, or type. 2. Save it as a note. It saves even with no signal or if the AI is off. 3. If the site owner switched on **Voice-note summaries** in **Settings → VisionScaper**, tap **Summarise**. You see a summary and suggested notes, issues, tasks and materials without prices. 4. Each suggestion is saved only when you tap it, using the text you edited.

The phone sends only text. The AI uses your fal.ai key and is capped at 200 summaries a day per business. The AI never changes a price and never saves anything itself.

Tips

- Keep triggers to a few. A trigger that messages customers still goes through the approval queue by default.
- Voice notes are a time saver for crew leaders. The owner must switch the feature on.

If something goes wrong

- No Summarise button: the site owner has not switched on Voice-note summaries, or the daily limit was reached.
- A message did not go: it may be waiting for approval, or blocked by quiet hours, consent or an opt-out. See [faq-messaging].

My Projects: quotes, hires, invoices and reviews

How a homeowner follows a job in My Projects: sign quotes, see appointments, pay invoices, share property details and leave a review.

My Projects is the homeowner's page for everything about work they are having done: requests, quotes to sign, appointments, invoices and reviews. It appears when your site owner has turned on the Contractor tools.

Before you start

- You must be signed in. If not, the page says "Sign in to see your projects and quotes."
- Contractors only appear here after you request a quote from them or hire them.

Steps: open it

1. Open VisionScaper on your website.
2. Tap **My Projects** (subtitle "Quotes, hires & schedule"). On the front screen the third big button, **See my project**, also leads here.
3. If a quote is waiting, the tile says how many quotes are to review.

What you will see

Sections appear only when they have something in them:

Section	What it holds
Coming up	Your next appointments (see [homeowner-my-calendar-and-messages])
Invoices to pay	Open invoices, each a link to pay
Quotes waiting for you	Quotes sent or viewed, with **View & sign**
Active jobs	Signed jobs not finished
Requests sent	Requests that have no quote yet
Contractors you've hired	Each hired contractor and their jobs
Finished	Done jobs
Older quotes	Declined or expired quotes (collapsed)
Photos from your visits	Photos your contractor chose to share
My property	Your address, aerial view and guided property photos

If you have no projects, you will see "No projects yet" with a button to find a contractor.

The progress line

Each project card shows five steps: **Requested**, **Quote**, **Hired**, **Scheduled**, **Done**. A request card may say how complete your request is, and which missing detail would help contractors quote without calling.

Steps: sign a quote

1. Under **Quotes waiting for you**, tap ✍ **View & sign** on the quote.
2. Read the proposal. Pick optional add-ons if the contractor offers them.
3. Draw your signature, tick the agreement box, and submit. You are asked for your name too.

Use **View proposal** later to read a quote you already handled. **Call**, **Messages** and **Contractor** buttons on each card let you reach them.

Saved card for autopay

If your contractor uses autopay and the site owner has turned it on, you can save a card or bank account on Stripe's page from My Projects, and remove it later. VisionScaper keeps only Stripe's ids, never a card number.

Steps: leave a review

After a job is done, or an invoice is paid, a review button appears on the card. 1. Tap ⭐ **Leave a review** (later it says ⭐ **Edit my review**). 2. Rate **Overall** from one to five stars. 3. Rate **Dream-to-Reality**: how closely the finished yard matches your design. 4. Write a few words about the work, crew, communication and cleanup. 5. Optionally add a photo of the finished yard. 6. Tap **Post review**.

Some contractors then offer a link to post the review elsewhere too. You can say no thanks.

Tips

- Use **Request quotes** at the top to ask more contractors.
- A "More work" card lets you ask a contractor you already use for extra work.

If something goes wrong

- A quote is not listed: the contractor may not have sent it yet. Check Messages.
- The page asks you to sign in again: your session ended. Sign in and reopen it.

My Calendar and Messages for homeowners

See every appointment contractors book with you, confirm or ask for a new time, subscribe in your own calendar, and use Messages.

Two places keep you in touch with contractors: **My Calendar** (inside My Projects) and **Messages**.

My Calendar

When a contractor books a site visit, estimate or job day with you, it lands here by itself. They also remind you before it, on the schedule they set.

Steps: respond to an appointment

1. Open **My Projects**, then **My Calendar** (the Coming up section links to it with "See all on My Calendar").
2. Appointments are grouped by day. Each shows the type, project, time, contractor with a phone link, and location.
3. The status reads **Please confirm**, **You confirmed**, **You asked for a new time**, **Done** or **Cancelled**.
4. Tap ✅ **Confirm**. The contractor is told.
5. Or tap 🔁 **Ask for another time**, type a note (for example "Any weekday after 3 pm works"), and tap **Send**. Your appointment stays on the calendar until the contractor changes it.
6. Tap 📅 **Add to my calendar** and choose **Google Calendar** or **Apple / Outlook (.ics file)** to add one appointment.

Past appointments are listed under **Past appointments** (collapsed).

Steps: subscribe once

1. In My Calendar, tap the update-from-calendar button near the top (labelled "Update from calendar").
2. Choose **Apple Calendar / Outlook** or **Google Calendar**, or copy the private link into any calendar app (Subscribe or From URL).
3. Every appointment and every change then shows in your calendar app.

> Warning: anyone with that link can see your appointment times. If you shared it by mistake, choose **Make a new private link** and confirm. The old link stops working.

Messages

Messages holds every conversation: you and a contractor about a project, and you and other community members.

Steps

1. From the front screen tap **Messages** (subtitle "Contractors & members"). A dot shows unread conversations.
2. Use the filters: **All**, **Unread**, **Contractors**, **Members**, **Projects**, **Archived**.
3. Use **Search messages** to find one.
4. Open a conversation and type in **Write a message...**. You can add up to 5 photos per message.
5. Project conversations show the address, next appointment and quote at the top.

In a conversation, open the menu (the three dots) for **Mute alerts**, **Archive** and **Mark unread**. An archived conversation comes back when a new message arrives. Closed project conversations reopen if the other person writes again.

Tips

- Requests you send from Find a Local Contractor open a conversation with each contractor automatically.
- You cannot message a member who blocked you, and brand-new accounts cannot send links to strangers. Describe the link instead.
- If you send many messages quickly you will be asked to wait (120 messages an hour).

If something goes wrong

- "Sign in to see your messages." Sign in first.
- No appointment appears: the contractor may not have booked it in VisionScaper. Ask them in Messages.
- A reminder never came: the contractor sets reminder rules and channels, and texts need their plan and setup. See [faq-messaging].

Find a Local Contractor and Request quotes

Search contractors near you, add several to one request, answer the guided brief, and send it for quotes.

Find a Local Contractor lists approved landscapers who work in VisionScaper. **Request quotes** sends one guided brief to as many of them as you choose.

Before you start

- You need a free account to send a request.
- If no contractors appear, the site owner may not have approved any yet (see [contractors-admin]).

Steps: find contractors

1. Tap **Find a Local Contractor** on the front screen.
2. Enter your town or ZIP. Optionally type a business name.
3. Choose a service chip (the first is **Everything**) and a sort: **Nearest**, **Top rated** or **Best Dream-to-Reality**.
4. Tap **Search**.
5. Each card shows reviews, jobs done, **Licensed**, **Insured**, **Pay online** and some services. Cards say "New on VisionScaper" if there are no reviews yet.

Dream-to-Reality is a score past customers give for how closely the finished yard matched their design.

Tap a card for the contractor's profile: scores, star bars, work gallery, About, designs they made real (before, design, finished), and reviews with replies. From a profile you can **Request a quote**, add them to your request, **Call**, open their **Website**, or **Message**. A contractor not taking requests shows "Not taking new requests right now".

Steps: build one request for several contractors

1. Tap **+ Add to my request** on each contractor (it changes to ✓ **In my request**). Or tap **Add everyone who serves my area**.
2. A bar at the bottom counts them. Tap **Request quotes →**. You can clear the list.

Steps: answer the brief

The wizard asks one thing per screen, says why, and saves a draft to your account as you go. If you come back you are asked "Pick up where you left off?"

The short path has seven steps: **Contractors**, **What**, **Describe**, **Property**, **Budget & timing**, **Contact**, **Review**. Choosing to add more detail brings back **Design**, **The site**, **Details** and **Priorities**.

- **What**: pick services such as Landscape design, Planting, Mulch & stone, Lawn installation, Patios & walkways, Retaining walls, Landscape lighting, Fencing, Drainage & grading, Tree work, Lawn care, Irrigation.
- **Property**: a guided capture: address, bird's-eye view, then photos of the front, left side, right side, back, structures and existing plants. Aerial photos cover US addresses. If yours is missing, skip it; the contractor will measure on site.
- **Contact**: a mobile number is required (10 digits).
- **Review**: a completeness score and a list of what is still missing. Tick the consent box to share your name, phone, email, address, photos and request with those contractors, then tap **Send to N contractors**.

After you send

Each contractor gets your full brief. They can message you, book a visit and send a quote. You get an alert for each, and everything shows in Messages and My Projects. A list shows who it was not sent to and why.

Tips

- A more complete brief means fewer phone calls.
- Sending is limited per day (20 requests).

If something goes wrong

- "Add at least one contractor (step 1)." Your list was empty.
- "Tick the box to confirm the contractors may see your details." Required consent.
- "Add a phone number so contractors can reach you." The Contact step needs 10 digits.

The Inspiration Board

Save pictures, plants, materials, styles and designs you love, then run AI Style Analysis to find your style.

The Inspiration Board is a place to collect things you love before and while you design.

Steps: open it

1. On the front screen, tap 💡 **Inspiration Board** (it is in the help links near the bottom).
2. The board explains itself: "Save pictures, plants, materials, styles and designs you love. Then let AI find your style and apply it to your yard."

Steps: add things

Use the add buttons at the top: 1. **Add a note**: type "Note (what you like about it)". 2. 🌿 **Plant** (Save a plant): search for a plant and save it. 3. 🪨 **Material** (Save a material): save mulch, stone, lawn or paving you like. 4. 🎨 **Style** (Save a style): pick styles such as Traditional, Contemporary, Low-maintenance or Pollinator. 5. Add a picture: snap a neighbor's garden, a plant at the nursery, or a patio you saw online. 6. In the designer you can also tap ♡ **Save to board** on any plant, or use **Save to my Inspiration Board** from a design.

You will see "Saved to your board." To remove something, confirm "Remove it from your board?"

If the board is empty it says: "Nothing saved yet. Snap a neighbor's garden, a plant at the nursery, a patio you saw online, or tap ♡ Save on any plant in the editor."

Steps: AI Style Analysis

1. Save at least 2 pictures, or a few plants, materials and styles. Otherwise you see "Save at least 2 pictures (or a few plants, materials and styles) first."
2. Sign in. You will see "Sign in (free) to use AI Style Analysis." if you have not.
3. Tap ✨ **AI Style Analysis**.
4. Read your style result. Tap ♡ **Save my style** to keep it.

The analysis uses the site's vision AI (the fal.ai key). The code header says the AI design assistant uses no image credits.

Tips

- Add a note to each picture, so you remember why you saved it.
- Boards are a good starting point to show a contractor when you request quotes.

If something goes wrong

- Nothing saves: your browser may be blocking storage (private mode). The board is stored through the designer's browser storage, so clearing browser data may remove it. Whether it also syncs to your account is not verified in code.
- AI Style Analysis does nothing: the site owner may not have added the fal.ai key in Settings → VisionScaper. See [ai-credits-storage-packs-shop] for the AI settings.

The VisionScaper Browser: browsing and sharing designs

Browse community designs, search and filter them, share your own design or ask for ideas, and what the privacy check means.

The public community browser shows designs that members chose to share, plus "Ask for ideas" posts. The front-screen tile is **Community designs** (subtitle "Ideas from other yards").

Before you start

- Browsing is open to everyone. Posting, rating, commenting, following and messaging need a free account.
- The community must be turned on by the site owner (see [community-moderation-settings]). If it is off, the app says "The community isn't open yet."
- A member the owner has banned can still design but cannot post, comment, like or message.

Steps: browse

1. Tap **Community designs**.
2. Use the tabs: **Discover**, **Following**, **Ask for ideas**, **Leaders**, **People**.
3. Search designs, plants and tags. Sort by **Trending**, **Newest**, **Top rated**, **Most liked**, **Most discussed** or **Most viewed**.
4. Narrow by time (**All time**, **This week**, **This month**, **This year**) and by rating (**4★ and up**, **4.5★ and up**). Tap a tag to filter by it.
5. Tap a design to open it. A before and after slider appears if the post has a before photo.

Following shows posts from members you follow. If you are signed out it asks you to sign in. A design page lists the plants and features used and how old they were when planted.

Steps: share a design

1. Open a design in the designer, or tap **Share a design** in the browser.
2. Choose **Show off a design** (the plants and features you used are listed automatically).
3. Give it a **Title** of at least 3 letters. The title can be up to 100 characters.
4. Add a **Description (optional)** of up to 3000 characters.
5. Pick up to 8 tags, or type your own (30 characters each).
6. Tick the privacy box: your picture does not show a house number, license plates, people's faces or anything private, and you are happy for it to be public.
7. Tap **Post to VisionScaper Browser**.

You will see "Your design is live in the VisionScaper Browser!" Followers get a notification.

Steps: ask for ideas

1. Tap **Ask for ideas** and choose **Take a photo** or **Upload** a picture of a spot in your yard.
2. Add a title and describe the spot: sun or shade, what you like, budget, what to avoid.
3. Tap **Ask the community**.

Members who reply with ideas earn points, and you get a notification for every reply.

What the site checks

- A small family-friendly word filter checks the title, text and tags. If it trips you see "Please keep it friendly — some words aren't allowed in the community."
- If the owner turned on the picture check and added a fal.ai key, an AI looks at the picture. If it fails you see "That picture can't be posted in the community." If the checker is down, posting is not blocked, and reports still work.
- Posts go live immediately. Anything reported by enough members is hidden until the owner reviews it.
- Pictures can be up to 4 MB.
- You can post 12 times a day ("You've posted a lot today — try again tomorrow.").

Tips

- Add a before photo and good tags so people can find your design.
- Only your display name, photo, bio, level and badges are public, never your email, phone or address.

If something goes wrong

- "Please sign in first." Sign in.
- "Your account can't post in the community. Contact us if you think this is a mistake." Your account was banned.
- "The picture didn't come through." Try a smaller or different picture.

Ratings, comments, follows, friends and messages in the community

How to like, star-rate, comment, report, follow, friend, block and message other members.

Everything here needs a free account and a community that is switched on.

Like and rate

1. Open a design.
2. Tap the heart to like it. Tap again to unlike.
3. On a design (not an "Ask for ideas" post) give 1 to 5 stars. You can change your stars later.

You cannot rate your own design ("You can't rate your own design."). A rating of 4 or 5 stars earns the author points. Likes and ratings update the Top rated and Most liked sorts.

Comment

1. Tap 💬 **Comment** (on an "Ask for ideas" post it reads **Give ideas**).
2. Write up to 2000 characters. The box suggests "Say something nice or ask a question…", or "Share your ideas — plants, layout, tips…".
3. Send. You can reply to a comment, and like comments.
4. To remove your own comment, use delete.

The same word filter applies. Comments are limited to 60 an hour.

Report

Tap **Report** on a post, comment or member. Choose a reason: Not about landscaping, Rude or offensive, Spam or advertising, Shows private information, Inappropriate picture, or Something else. Reports are private. Anything reported by several members is hidden until the site owner reviews it.

Follow

1. Open a member's profile or a post.
2. Tap **+ Follow**. It becomes ✓ **Following**.
3. Their new posts appear on the **Following** tab and you get a notification.

Followers and Following counts open lists.

Friends

1. On a member's profile tap 🤝 **Add friend**.
2. The button shows ⏳ **Request sent**. The other member sees ✓ **Accept friend request** and the request in **Friends**.
3. Once accepted it shows 🤝 **Friends**.

A member who blocked you cannot be added ("You can't add this member.").

Messages

1. Tap **Message** on a post or profile, or open **Messages** from the front screen.
2. Write your message. Messages with members and with contractors appear in the same inbox (see [homeowner-my-calendar-and-messages]).

You can switch off the matching emails in your profile under "Email me when…": someone sends me a message, someone comments on or replies to my posts, someone follows me or sends a friend request.

Block

On a member's profile choose the block option. The app says "[Name] is blocked. They can't message you or see you in their feed." Blocked members are listed under **Blocked members** on your profile, where you can unblock.

Tips

- Notifications for new messages and comments are on by default. Follow and friend emails are off by default.

- The site owner can turn all community emails off.

If something goes wrong

- "You can't message this member." They blocked you.
- "Slow down a little — try again in a few minutes." You hit the comment limit (60 an hour).
- A comment or post vanished: it may have been hidden after reports or removed by the owner.

Points, levels, badges, titles and rewards

How members earn points, climb levels, win badges, pick a name style and title, and trade points for AI credits or storage.

Members earn points for taking part. Points can be traded for AI credits or extra storage.

> Warning: every point value and reward price in the code is an unapproved placeholder, not approved. The site owner sets the real values in Settings. This article names the actions but gives no numbers.

Where to see your progress

Tap the progress banner at the top of the community browser, or open your profile from **My Account**. You will see your level, a progress bar, "points to spend", a streak counter (days in a row), ways to earn, badges, and recent points.

Ways to earn points

The profile lists each way with its current value and a daily cap where one applies. The list covers: - Daily visit (once a day, and it builds your streak) - Your first design, and each new design - Sharing a design to the community - Each like you receive - Each comment you write - Answering an "Ask for ideas" post - Your first Plant ID, and each Plant ID - Sharing to social media - Completing your profile with a photo and bio (once) - Your first AI design (once) - Each 4 or 5 star rating you receive - Each new follower

Some are once only. Others stop at a daily limit. The same like or rating is never counted twice. A banned member earns nothing.

Levels

There are seven levels based on lifetime points: Seedling, Sprout, Gardener, Green Thumb, Landscaper, Master Gardener and Garden Legend. When you cross a threshold you get a notice. Spending points does not lower your level.

Badges

Badges unlock automatically. Locked ones show a lock and how to earn them:

Badge	How to earn it
First design badge	Create your first design
Plant Spotter / Plant Detective	Identify your first plant / identify 25
Show-off / Prolific Designer	Share your first design / share 10
Crowd Favorite	Get 25 likes on one design
Five-Star Design	A 4.5+ average from 5 or more ratings
Helpful Neighbor	Reply with ideas on 5 "Ask for ideas" posts
Social Butterfly / Popular	Follow 10 members / have 25 followers
Design Critic	Rate 20 designs
Week Streak / Month Streak	Visit 7 / 30 days in a row
One-Year Member	Be a member for a year
Top Designer	Finish a month in the top 10 on the leaderboard
AI Artist	Create your first AI design

Name styles and titles

1. Open **My public profile** on your profile page.
2. Pick a **Name style**: Classic, Leaf green, Gold, Blooming gradient or Legend glow. Higher styles unlock with levels (Legend glow also unlocks with the Top Designer badge).
3. Pick a **Title under your name** from the levels and badges you have earned.
4. Save.

Steps: trade points for rewards

1. Open your profile and find **Trade points for rewards**.
2. Choose **1 AI credit** or an amount of storage (the card shows the size and the points cost).
3. Tap **Trade**. A lock shows when you do not have enough.

You will see a message like "+1 AI credit added to your account." Points spent are recorded as a negative entry in **Recent points**.

Tips

- The site owner can also give bonus points to a member (see [community-moderation-settings]).
- Titles and styles are cosmetic.

If something goes wrong

- "You need N points for that" means your balance is too low.
- "This reward isn't available." The owner set that reward's cost to zero.
- No points arrive: the community may be off, or you hit the daily cap.

Community moderation and settings (for the site owner)

Turn the community on, tune reports and points, review hidden posts, ban members and give bonus points.

Two WordPress screens control the community. Both are for administrators.

Part 1: Settings → VisionScaper

Scroll to the **Community** section (its heading may still show an older product name).

Setting	What it does
Turn on the community, points and rewards	Master switch. Off means the community is closed
Email members about new messages and comments	Members can still turn it off themselves
Check posted pictures with AI before they go live	Uses your fal.ai key
Email me about every new community post	Goes to the address in "Send designs and leads to"
Hide a post after this many reports	Reports needed to hide it until you review it (1 to 20)

Points list each action (daily visit, first design, each new design, sharing, likes, comments, answers to ideas, Plant ID, social share, profile, first AI design, ratings, followers). **Rewards** set "Points for 1 AI credit", "Points for extra storage" and the megabytes that gives. Setting a reward to 0 turns it off.

> Warning: all default point and reward values in the code are placeholders, not approved. Choose your own. Each AI image costs you real money from your AI provider, so price credit rewards with that in mind.

Save the settings with the page's save button.

Part 2: Settings → VisionScaper Community

This is the moderation screen. At the top it counts live posts, comments, members with points and messages.

Needs review

Items that are hidden or have open reports appear here with their reports and reasons. For each you can: 1. **Keep (it's fine)**: restores the item and dismisses the reports. 2. **Remove**: removes it and closes the reports. A confirm box asks "Are you sure?" 3. **Ban member**: stops that member posting, commenting, liking or messaging, and hides their live posts. They can still design.

Latest posts

A table of recent posts with likes, rating, comments and status, with actions to hide or remove one.

Members

The top members by lifetime points, with their level and balance. You can: - **Ban** or **unban** a member. After unbanning, restore their posts one by one if you want them back. - Enter a number of points and tap **Give points** (a negative number takes points away). The member is notified: "You received N bonus points from the team!"

Administrators cannot be banned.

Tips

- If reports pile up, lower or raise the hide threshold to match your traffic.
- Reports are one per member per item.
- The picture check never blocks posting if the checker is unreachable, so keep an eye on the Needs review list.
- The word filter is built in and has no setting.

If something goes wrong

- A report email did not arrive: report emails go to your notify address. Check Settings → VisionScaper → "Send designs and leads to" and your site's email delivery.
- A member says they cannot post: check whether they are banned.

AI credits, storage packs and the shop

How free and bought AI credits work, how online storage works, and how the site owner sets up the Stripe-powered shop.

VisionScaper has a small shop on your website for two things: extra AI credits and extra online storage. Customers pay on Stripe's secure checkout page.

> Warning: pack names, sizes, prices, the per-credit price, and the free daily and storage amounts in the code are unapproved placeholders. Set your own before launch.

How credits work (for customers)

- Each AI image change uses one credit. Placing plants, painting ground, drawing beds and changing the season never use the image AI. The settings note says Smart Select and Identify are free.
- Customers get free credits each day. When those run out they can buy more. Bought credits never expire and are used after the free ones.
- If the person belongs to a contractor plan with monthly AI credits, the order is free daily credits first, then plan credits, then bought credits.
- Administrators can be set to unlimited.

Steps: buy credits

1. Sign in. A signed-out visitor sees "Sign in to use and buy AI credits."
2. Open **My Account** and tap **Get more** next to AI credits, or tap the buy prompt when you run out. The prompt also says "This uses 1 AI credit" before a paid change.
3. Pick a pack under **Credit packs** (one is marked **Best value**), or use **Or choose exactly how many** and type a **Number of credits**.
4. You are sent to Stripe's page ("Opening secure checkout..."). Pay.
5. You return to VisionScaper and the credits are added. If you cancel you will see "Purchase cancelled — you weren't charged."

If buying is off you will see "Buying extra credits isn't available yet — your free credits refill every day."

Storage (for customers)

Signed-in customers get free online storage for their designs and library (plants from Plant ID, their own photos). The **My storage** screen shows used and total space. Typical sizes are shown: a Plant ID plant is about 0.2 to 0.5 MB, a design about 1 to 4 MB, an AI design about 0.5 MB.

To add more space, choose **Add more storage — one-time, never expires**, pick a pack, and pay on Stripe. You can also delete designs you no longer need from My designs.

Setup (for the site owner)

All of this is in **Settings → VisionScaper**. 1. In **AI**, add your image AI key (Black Forest Labs), your fal.ai key and, for plant identification, your Pl@ntNet key. Follow each provider's current sign-up instructions. Set **AI image generations per customer per day**. 2. In **Selling extra AI credits**, create a Stripe account and finish its business details, copy the secret key from Stripe's developer area into **Stripe secret key**. Use a test key first if you want to try it. 3. In Stripe, add a webhook endpoint at the URL shown on this page, for the event `checkout.session.completed`, and paste Stripe's signing secret into **Stripe webhook signing secret**. Follow Stripe's current instructions for those screens. 4. Tick **Let customers buy extra AI credits**. Optionally tick **Email me about each purchase**. 5. Under **Credit packs**, write one pack per line as `Name | credits | price in dollars` (up to 4 packs look best). 6. Set **Price per single credit ($)** (0 means packs only) and **Minimum custom purchase (credits)**. 7. For storage, scroll to **Selling extra library storage**, tick **Let customers buy extra storage**, and fill **Storage packs**, one per line: `Name | megabytes | price in dollars` (1 GB = 1024 MB). The free amount per customer is **Online storage per customer (MB)** under Customer accounts. 8. Save.

Credits are also confirmed when the customer returns to your site, so a missed webhook does not lose a purchase. The smallest purchase Stripe will take here is $0.50.

Tips

- Each purchase is logged against the customer (the last 50 are kept).
- Buying is also paused for contractors in the "payments overdue: restricted" stage if you left that option on.

If something goes wrong

- "Please wait a bit and try again." More than 20 purchase attempts in an hour.
- Credits did not arrive: see [troubleshooting-rest-errors-and-stripe-webhooks].

Customer accounts and sign-in

How homeowners create an account, sign in with email, Google or Facebook, reset a password and delete their account.

Anyone can design without an account. Their work is saved on their own device. An account saves designs online so they appear on any device, and unlocks the AI features.

What an account is

A customer account is a normal WordPress user with the **Subscriber** role. Customers never see the WordPress admin area; if they open it they are sent back to the app. You can see them under **Users** in WordPress.

Steps: create an account (customer)

1. Tap **Sign in** or **Sign in — it's free**, then choose to create an account (**Create my free account**).
2. Enter your full name, email and a password of at least 8 characters.
3. Tick the box to agree to the Terms of Service.
4. Add the extra details the form asks for (name, phone, address) when prompted.
5. Submit. You are signed in straight away.

Choose **Continue with Google** or **Continue with Facebook** instead if your site offers them. Those buttons only appear once the site owner has set them up.

Steps: sign in and reset a password

1. Tap **Sign in**, enter your email and password.
2. If you forgot it, type your email first, then tap **Forgot password?**. The reply is always "If that email has an account, a reset link is on its way." whether or not the address exists.

Steps: change your details or delete the account

1. Open **My Account → My details** to change name, phone and address.
2. To delete everything, use **Delete account** under My Account. Your designs and files are wiped and you are signed out. Staff accounts cannot be deleted this way.

Limits

Action	Limit
Sign-ups from one internet address	8 an hour
Sign-in tries	20 per 15 minutes
Password reset requests	5 an hour

Setup (site owner)

In **Settings → VisionScaper**, under **Customer accounts**: 1. Set **Online storage per customer (MB)**. 2. For **Sign in with Google**, create credentials in Google Cloud and add the redirect address shown on the page, then paste **Google Client ID** and **Google Client secret**. Follow Google's current instructions. 3. For **Sign in with Facebook**, create an app in Meta for Developers, add the redirect address shown, then paste **Facebook App ID** and **Facebook App secret**. Add your privacy policy and data-deletion instruction links. Follow Meta's current instructions. 4. Under **Basics**, tick **Email me when someone creates an account** if you want a notice.

Tips

- Contractors apply from My Account (**Create my contractor account** or Become a VisionScaper contractor). They are approved in Settings → VisionScaper Contractors.
- Every sign-up records the Terms version the person accepted.

If something goes wrong

- "That email already has an account. Sign in instead (or use "Forgot password")." The email is taken.
- "That email and password don't match. Try again or reset your password."
- "Too many attempts. Please wait a few minutes." You hit a limit above.
- "Sign-in didn't finish." Try the Google or Facebook button again. Check the redirect address matches exactly.

View as customer: try a customer's plan

An admin-only tester that shows the Contractor Hub as a customer on any plan or billing state would see it, without charging anything.

View as customer lets a site administrator see the Contractor Hub exactly as a contractor on a given plan or billing state would, so you can check what each plan includes and what a late payer sees.

Before you start

- You must be a WordPress administrator. Customers never see this tool, and the website refuses everyone else.
- Open the Contractor Hub in your browser, signed in as the administrator.

Steps

1. Look for the floating button at the bottom left, labelled 🧪 **View as customer**.
2. Tap it. A panel opens titled **Test the customer experience**.
3. Pick a state. Options are grouped: - **Start**: "No plan yet (new sign-up)" and "Free trial". - **Paid plans**: one entry per plan, such as "Professional plan (paid)". - **When payment fails**: "Payment overdue: some tools paused", "Payment overdue: read-only", "Suspended", and "Subscription ended".
4. The page reloads. The button now reads 🧪 **Viewing as: [state]** and turns orange.
5. Use the Hub normally and see what that customer would see.
6. To stop, open the panel and tap **← Back to my own account**.

What it does and does not do

- It applies only to your own administrator account, in your own requests. Nobody else is affected.
- It changes nothing stored about any subscription. The choice is one short-lived setting that ends by itself after 8 hours.
- Billing actions are refused while you view: checkout, confirm, plan change, cancel, card portal, preferences, and phone or email verification codes. You will see: "Test view: billing actions are switched off while you view as a customer, so nothing is charged or changed. Choose "Back to my own account" to turn billing buttons back on."
- The Hub's real data is still yours. The usage bars measure your real customers and records against that plan's limits.
- While viewing, billing is treated as live, even if you switched billing off.

Use it with the Entitlements page

Plan contents come from the plan matrix (see [entitlements-admin-page]). Change a plan's feature, then use View as customer to confirm the plan now shows or hides it.

> Note: which plan includes which feature is a placeholder set in the code and is not approved.

Tips

- Check "Payment overdue: some tools paused" after editing the failure settings in the Plans page, to see what pauses.
- Check "Free trial" to see what a brand-new contractor gets.

If something goes wrong

- The button is missing: you are not an administrator, or the Hub has not finished loading.
- You are stuck in a test state: open the panel and choose **← Back to my own account**. It also ends after 8 hours.
- A billing button does nothing: that is expected while viewing.

The Plans admin page: billing, trials and failed payments

Turn contractor billing on, set up Stripe, shape the trial and the failed-payment steps, edit plans, and manage each contractor's subscription.

Settings → VisionScaper Plans controls how contractors pay for the Contractor Hub. Contractors pay monthly or yearly. New contractors get one free trial.

> Warning: the plan names, prices, allowances and which features each plan includes are unapproved placeholders. Nothing here should be treated as final until you approve it.

Before you start

- Add your Stripe secret key under **Settings → VisionScaper → Selling extra AI credits**. Until you do, a warning shows and every approved contractor has full access for free.
- You are always on the top plan for free.

Steps: set up billing

1. Fill in the plan prices in the **Plans** table and click **Save plans**.
2. Click **Create these plans in Stripe** (it shows only when a Stripe key is saved). It creates a Stripe product plus monthly and yearly prices for each plan. Or paste price IDs you made yourself into the Stripe price ID rows.
3. In your Stripe dashboard add a webhook at the endpoint address shown on the page, with the events listed there: customer.subscription.created, customer.subscription.updated, customer.subscription.deleted, invoice.paid and invoice.payment_failed, plus checkout.session.completed.
4. In Stripe's customer portal settings, turn on the options the page lists (update payment methods, view invoices, switch plans, cancel at end of period).
5. In Stripe's revenue recovery settings, follow the page's guidance about retries and about turning off Stripe's own failed-payment emails, so contractors hear one voice. Follow Stripe's current instructions for these screens.
6. Tick **Turn on contractor billing** and save. Contractors approved before today get one grandfathered trial so nobody is cut off.

Page sections

- **Billing**: the master switch ("On since" date shown).
- **Free trial**: number of days, which plan the trial uses, and whether to require a phone number verified by text (needs Twilio; skipped if Twilio is not set up).
- **Trial allowances**: AI credits and landscape plans during the trial. Every feature of the trial plan is on. Only these allowances are smaller, to protect AI cost.
- **When a payment fails**: stages counted in days from the first failed payment, which you set: 1. Day 0, notice: full access, a quiet banner, one email. 2. Reminder: a stronger banner, another email. 3. Restricted: everything works except what costs you money. You tick which things pause: AI, new landscape plans, buying credits or storage, large uploads, automatic follow-up texts. Appointment reminders, receipts and invoices keep going. 4. Read-only: view, export and pay only; hidden from homeowners. 5. Suspended: "Suspended — Payment Required". Nothing is deleted. 6. After a number of unpaid days it is flagged as eligible for deletion under your retention policy. Nothing is deleted automatically. Paying at any stage restores everything instantly.
- **Fair use**: an alert when an "unlimited" plan makes many landscape plans in a month. Nothing is blocked.
- **Keep data after cancelling**: the minimum months shown to contractors.
- **Plans** table: name, tagline, "Most popular badge", What's included, Not included, monthly and yearly price, Stripe price IDs, and each limit or switch. Use "unlimited" for no limit.

The Contractors list

Below the plans you see monthly recurring revenue, counts by status, trials ever and converted. Each row shows business, status, plan, trial or renewal date, last payment and notes. Owner actions each need a reason:

Action	Meaning
Extend trial	More trial days
Give free access (comp) / End free access	Comp a contractor, or stop it
Give more time to pay (days)	Extra grace
Suspend now / Restore	Pause or reinstate
Grant a second trial (exception)	One-time exception

Action	Meaning
Set plan	Choose their plan

Tips

- Changes to prices apply to new subscriptions at once. To change what existing subscribers pay, create a new Stripe price. Stripe keeps them on their current price until you move them.
- Use [view-as-customer-tool] to preview each stage.

If something goes wrong

- A red "Stripe said: ..." message shows Stripe's own error. Fix the key or the prices.
- "Please write a reason — every exception is recorded." Fill in the Reason box.

The Entitlements admin page

See and edit which features each plan includes, give one account an exception, open a catch-up window, and read the audit log and refusals.

Settings → VisionScaper Entitlements is one list of what each plan includes. The same values power the app, the website pricing feed and the server checks.

> Warning: every tier assignment in this matrix is an unapproved placeholder. Prices are proposals and stay hidden from visitors until you approve them.

What the banners mean

- **Billing is switched OFF.** Every contractor gets the top plan. Nobody is charged or limited by plan. Turn billing on in VisionScaper Plans when ready.
- **Billing is on but Stripe is not connected.** Accounts keep the plan and state on record, but no one can start or change a subscription until the Stripe key is added.

Plan matrix

A table with one row per capability and one column per plan, grouped (Customers & Sales, Schedule & Field, Marketing & Growth, Finance & Reports, Design Studio, Team & Training, Settings & Integrations, and Planned). - A switch shows a checkbox. - A limit shows a number box, or "unlimited". - A row marked "✓ all plans" is part of every plan. - A row marked "not built" is planned and cannot be given yet.

Steps: change a plan

1. Tick or untick, or type a new limit.
2. Fill in **Reason for this change (required, kept in the audit log)**.
3. Click **Save plan matrix**. You will see "Saved and written to the audit log."

Prices & upgrade destination

- Tick **I have approved the plan prices — show them to visitors and in upgrade prompts** only when you mean it.
- **Where "See plans" goes**: a link for upgrade prompts. Leave empty for the app's Plan & billing screen.

Give one account a feature (or take it away)

1. Enter the **Contractor user id**.
2. Choose the **Entitlement**.
3. Enter a **Value**: 1 or 0 for a switch, or a limit. Use -1 for unlimited.
4. Optionally set **For how many days** (empty means until cleared).
5. Fill in **Reason (required)** and click **Save override**.

Active overrides are listed with a **Clear** link.

Catch-up window

Before version 2.38.0 some plan-card features, the Route Optimizer and job costing, were not really switched off for lower plans. With billing on, this window lets accounts that subscribed before today keep the features you pick until a date, so nobody loses something without notice. It is off unless you open it, and every use is labelled "grandfathered". Untick everything to close it.

Audit log and recent refusals

- **Audit log** records who changed what, before and after, and why.
- **Recent refusals** lists the last 50 times a request was refused: account, route, entitlement and reason code. Only those four things are kept.

Reason codes

Code	Meaning
FEATURE_NOT_INCLUDED	The plan does not have it

Code	Meaning
SUBSCRIPTION_REQUIRED	No subscription yet, or the record is missing
USAGE_LIMIT_REACHED	The allowance is used up
SUBSCRIPTION_INACTIVE	Paused, cancelled, trial over, or payment too late

Nothing here deletes data. An inactive or lowered plan stops creating, sending and premium reports. Reading, exporting and paying stay open.

Tips

- Use [view-as-customer-tool] to see the effect of a change.
- Every contractor route is checked on the server, and an unknown route is protected by default.

If something goes wrong

- "Nothing changed." You saved without any difference.
- A contractor says "my plan doesn't include X": check Recent refusals for their code, then the matrix or an override.

The Contractors admin page: approve, suspend or reject

Review contractor applications, check licence and insurance, and approve, suspend or reject each business.

Settings → VisionScaper Contractors is where you decide who gets the Contractor Hub and who is listed under **Find a Local Contractor**.

Before you start

- The Contractor tools must be on. If not, a yellow notice links you to **Settings → VisionScaper → Contractors**, where you tick **Turn on the Contractor Hub, Find a Local Contractor and My Projects**.
- A contractor applies from **My Account → Become a VisionScaper contractor** (the form button is **Create my contractor account** for new people). They also tick the Terms of Service.
- The menu item shows a red count of applications waiting.
- By default you approve each one yourself. The setting **Approve contractor applications automatically (not recommended)** skips that. Leave it off if you want to check people first.

Steps: review an application

1. Open **Settings → VisionScaper Contractors**.
2. The table lists businesses with pending ones first, then approved, suspended and rejected.
3. Read each row: - **Business**: logo, name, website, short bio. - **Contact**: name, phone, email. - **Area**: town, state, service radius in miles and services offered. - **License / insurance**: the licence text they gave (or "none given"), "Insured ✔" or "not insured", and years in business. - **Activity**: quotes sent, signed, jobs done, and star rating. - **Status** with the application date.
4. Check their licence and insurance with the issuing authority before approving. VisionScaper does not do that check for you.

Steps: decide

Click one of the buttons in the last column: - **Approve**: the status becomes Approved. The contractor gets an email "You're approved as a VisionScaper contractor" with a link to the Hub, an in-app message, and they appear under Find a Local Contractor. - **Reject**: the status becomes Rejected. They get an email titled "Your VisionScaper contractor application" saying you cannot approve them right now. Rejecting is how you decline. - **Suspend**: shown for approved contractors. It sets their status to Suspended. Nothing is deleted.

You will see "Saved." A button for the current status is hidden. Your own administrator account is always approved and has no buttons.

What approval gives

Approved contractors get customers and properties, the 2D site plan, takeoff and estimates, two quotes (job cost and customer proposal), e-signature, email and text follow-ups, scheduling, job costing and invoices. Homeowners can then find them and request quotes.

Tips

- Billing and plans are separate. See [plans-admin-page].
- Add a short reason in your own notes for a rejection. The email is brief and polite.
- A pending badge disappearing means nobody is waiting.

If something goes wrong

- "No applications yet." Nobody applied.
- A contractor says they cannot see the Hub: check their status is Approved and that the Contractor tools are on.
- Emails not arriving: see [troubleshooting-texts-and-email].

The Appearance admin page: site look and emergency reset

What the Appearance page shows, how themes and layouts inherit, what locks do, and the four emergency buttons.

Settings → VisionScaper Appearance is a status and rescue page. The actual look and layout are edited inside the app.

Where you edit the look

Inside the Contractor Hub: **Settings → 🎨 Appearance & layout → Whole site**. Homeowners and everyone else can personalise their own view at **My Account → Look & layout**. The admin page has a button, **Open the Appearance editor**, that takes you to the Hub settings.

Everything is stored as checked settings, never as custom CSS, HTML or script, so a theme cannot break the app. Every value is whitelisted and limited to a safe range.

How the layers combine

From first to last, each layer can override the one before unless it is locked: 1. System defaults 2. Site theme (set by an administrator) 3. Business theme (each contractor) 4. My preferences (each person)

Layouts follow the same idea: a role default (set by the administrator) and then each person's own layout. The theme can set mode (dark, light, system or high contrast), accent and other colors, type size, shapes and density.

Locks

An administrator can lock whole categories so lower layers cannot change them: colors, type, shape, density, motion, mode and layout. The administrator also chooses what contractors and homeowners may customise.

A contractor can switch on their brand color for their customer pages only if they choose to. It is checked so text stays readable.

What the page shows ("Right now")

Row	Meaning
Site look	The published site theme name, or "VisionScaper default"
Known-good copy	When the last good look was saved
Versions kept	How many earlier versions exist
Locked for everyone	Which categories are locked
Role default layouts	Which roles have a default layout

Emergency buttons

If something looks wrong for everyone, use these. They only affect the site-wide layer. Each business and person keeps their own choices.

1. **Restore last known-good look**: grey if no known-good copy exists.
2. **Back to the default look**: unpublishes the site theme (the old one is kept in history as "Before the emergency reset").
3. **Remove all locks**
4. **Clear role default layouts**

Each shows a green message such as "The site look is back to the VisionScaper default."

Tips

- Try a new site look in the editor and read it in light and dark mode before publishing.
- Use the locks sparingly. A locked category hides the choice from users.

If something goes wrong

- A button is greyed out: there is nothing to restore or unpublish.
- People complain about colors: use **Remove all locks**, then ask them to use **Look & layout**.

The Terms admin page: edit your Terms of Service

Where the Terms page comes from, how to edit the text, what happens when you save, and how acceptance is recorded.

Settings → VisionScaper Terms holds the text of your Terms of Service. A sensible default covering every VisionScaper feature ships with the plugin.

> Warning: have your attorney review any changes. The default is a template, not legal advice.

How the Terms page works

- A page called **Terms of Service** is created automatically. It uses the shortcode `[dreamscaper_terms]`. If it has not been created yet a built-in page serves the text.
- The Terms are linked from every screen of VisionScaper.
- Visitors see a notice: "By continuing to use this website you agree to the Terms of Service." Using the site counts as agreeing.
- People who create an account or apply as a contractor also tick a box. Each acceptance is recorded with the Terms version and the time.
- The default sections cover: Agreement; Who can use the website; Homeowners and members; Contractors; Contractor-only information about customers; Hiring and job applications; Door-to-door canvassing; Messages, alerts and texts; Your content; Acceptable use; Disclaimers; General.

Steps: edit the terms

1. Open **Settings → VisionScaper Terms**.
2. Edit the text in the big box. Format: - A line starting with `##` is a heading. - A line starting with `-` is a bullet. - Other lines are paragraphs. `<strong>` and `<em>` are allowed. `{brand}` is replaced by your business name.
3. Click **Save terms**.
4. You will see "Saved. Everyone will see the "Terms updated" notice the next time they use the app."

Steps: go back to the default

1. Tick **Reset to the VisionScaper default text**.
2. Click **Save terms**.

What saving does

The Terms get a short version id that changes whenever the text changes. Because the id changes, everyone is asked to accept again. The "Last updated" date shown on the page is set when you save.

Tips

- Read the default sections on contractor-only customer records before you change them. They match the behaviour described in [customer-records-admin].
- Keep headings short so the page is easy to scan on a phone.
- Do not paste in formatting from a word processor. Use plain text with `##` and `-`.

If something goes wrong

- The Terms page shows nothing: the page may have been deleted. Open the Terms admin screen once as an administrator and it will recreate the link and page.
- People say they were not asked again: they are asked the next time they use the app after the version changes.

The Customer Records admin page (contractor-only records)

Look up a customer's contractor-only records by email or phone, and mark a record Disputed, Active or Removed.

Approved contractors can record factual events about customers they have worked with. **Settings → VisionScaper Records** (the page title is "Customer records (contractor-only)") is where you handle a customer asking what is held, or disputing a record.

What the records are

The kinds of record are: - Invoice unpaid 60+ days - Paid 30+ days late - Payment reversed / charged back - Cancelled within 24 hours - No-show / no access at a booked visit - Cancelled after materials were ordered

Rules in the code: - Each record is tied to a real invoice, appointment or quote in that contractor's account. - Records expire after 24 months. - Another approved contractor sees a short summary only for a customer they are actually dealing with (someone in their own customer list). They never see which contractor recorded it, and every view is logged. - Customers are matched across contractors by one-way scrambled (hashed) email, phone and address, so the raw details are never shared. - The same data is included when a customer asks WordPress for their personal data (Tools, Export Personal Data), under "Records made by contractors". - Disclosure or misuse is grounds for ending the contractor's account under the Terms.

Before you start

You must be an administrator. The page opens with a count of active records.

Steps: look up a customer

1. Open **Settings → VisionScaper Records**.
2. In **Customer email or phone**, enter a full email address or a 10-digit phone number.
3. Click **Look up**.
4. A table lists matching records: **When**, **Record**, **Recorded by**, **Status**, and **Change**.

If you enter something that is neither, you see "Enter a full email address or a 10-digit phone number." If nothing matches, "No records for this customer."

Steps: change a record

1. On the row, choose the new status in the drop-down: - **Disputed (hide)**: hidden from contractors until you set it back to Active. - **Active**: shown again. - **Removed**: never shown again.
2. Write a short reason (up to 250 characters).
3. Click **Save**.

Tips

- Hide first while you investigate (Disputed), then decide.
- Write a clear reason, since it is kept on the record.
- Keep the Terms text for contractors up to date (see [terms-admin]).

If something goes wrong

- A customer cannot find their record: look up by the same email or phone the contractor used. Matches use scrambled copies of the email, phone and address.
- A record keeps showing: confirm you saved the change and that the page was reloaded.

FAQ: accounts and privacy

Eight quick answers about customer accounts, saved designs, passwords, social sign-in, deleting an account and what is public.

Short answers. Each links to a longer article.

1. Do I need an account to design my yard?

No. Anyone can design without an account. Your work autosaves privately in your own browser on that device and nothing is uploaded. An account saves designs online and unlocks the AI features.

2. What happens to my designs if I clear my browser?

Designs saved only on a device live in that browser's storage. Clearing browser data deletes them. If you were signed in, your designs are saved online and you can open them on any device.

3. How do I reset my password?

Type your email in the sign-in box, then tap **Forgot password?**. You will always see "If that email has an account, a reset link is on its way." whether or not the address exists. You can ask up to 5 times an hour.

4. Can I sign in with Google or Facebook?

Only if the site owner has set them up. The buttons **Continue with Google** and **Continue with Facebook** appear only then. The owner pastes the keys in Settings → VisionScaper (see [customer-accounts-and-sign-in]).

5. How do I delete my account?

Open **My Account** and choose **Delete account**. Your account, designs and files are removed and you are signed out. Staff accounts cannot be deleted this way.

6. What can other community members see about me?

Only your display name, photo, bio, level and badges. Never your email, phone or address. If you do not choose a display name, VisionScaper shows your first name and the first letter of your last name.

7. Why can't I post in the community?

Check these in order: you are signed in; the site owner has turned the community on; your account has not been banned ("Your account can't post in the community. Contact us if you think this is a mistake."). A banned member can still design.

8. How do contractors get an account?

They apply from **My Account → Become a VisionScaper contractor** and tick the Terms. The site owner approves or rejects them (see [contractors-admin]). Until approved they see only the application.

Tips

- Use a real email address, because password resets and receipts go there.
- Sign-ups are limited to 8 an hour from one internet address, and sign-in tries to 20 per 15 minutes.

If something goes wrong

- "That email already has an account." Sign in, or reset the password.
- "Please tick the box to agree to the Terms of Service." Tick the box on the sign-up form.

FAQ: designs, photos and AI

Seven quick answers about the camera, scale, growth slider, stretched materials, undo, aerial views and AI credits.

1. Does the camera work on every phone?

The live camera needs the page to load over https. If the camera is not available or permission is refused, VisionScaper falls back to the phone's photo picker, so you can still choose a photo. See [troubleshooting-studio-camera-caching] for fixes.

2. How do I make plants the right size?

Use the **Photo setup** tool and the **Set it up for me** step (version 2.45.0). It finds eye level from the phone's tilt, then straight lines in the photo, then AI, and spots a door, garage door, person or car and asks for one tap. It then shows 6-foot people to check ("They look too big / too small" nudges, with undo). Measuring yourself is an optional more exact section. The chip on the screen reads "Scale: good", "Scale: okay" or "Scale: check it".

3. What does the "See it grow" slider do?

It shows plants at future sizes using each plant's real growth curve. It reads like "In 5 years (2031)", has tick marks, and a **Fully grown** button. Plants have a **Size when planted** that you can choose from nursery sizes.

4. Why do my painted mulch or lawn look stretched?

In version 2.51.0 painted materials use a safer camera so they do not streak on your own photos. If one still looks stretched, turn down the **Perspective of painted ground** slider in the Brush and Bed panels. Material size also no longer changes on high-density (retina) screens.

5. How do I undo a mistake?

Press Ctrl+Z (or ⌘Z on a Mac) to undo and Ctrl+Shift+Z or Ctrl+Y to redo. Guided screens like Remove something have their own **Try again** and **Undo**. See [keyboard-and-gesture-cheat-sheet].

6. How do I remove weeds or an object from a photo?

Use **Erase & fill**. For weeds choose **Clear weeds, make a blank canvas**: circle the weedy part, review what it found, tap a red spot to leave one alone, then remove them all. For an object, choose **Remove something**, tap it, and compare Before and After with the slider. If it is not right, it asks what looks wrong and tries a different way, up to three tries.

7. Which addresses have an aerial (bird's-eye) view?

Any US address. Connecticut uses the state's 3-inch imagery. Elsewhere it uses a nationwide service at about 2 feet per pixel, which is fine for property lines, the house and the driveway. If there is no photo for your address, take or upload a photo instead.

Tips

- Start from a real photo taken at eye level, in daylight, with the whole area in frame.
- Use **Try a sample yard** to learn the tools without using your own photo.
- Placing plants, painting ground, drawing beds and changing the season are free. Image changes made by the AI use credits (see [ai-credits-storage-packs-shop]).

If something goes wrong

- The photo cannot be opened: use a JPG. On iPhone, Settings → Camera → Formats → Most Compatible.
- Blank studio: see [troubleshooting-studio-camera-caching].

FAQ: plans, billing and payments

Eight quick answers about trials, failed payments, data safety, plan changes, bought credits, customer payments and prices.

> Note: plan prices, tier contents, allowances and credit prices in the code are placeholders and not approved. Answers below describe how things work, not what they cost.

1. Is there a free trial for contractors?

Yes, one per business. The owner sets the number of days and which plan the trial uses. The business adds a card that is not charged until the trial ends, and verifies their email and phone (the phone check needs Twilio). A business that has had a trial is remembered, so deleting the account or changing email does not give a second one.

2. What happens if a payment fails?

Access steps down in stages, with full access first. A notice and email, then a stronger reminder, then costly extras pause (AI, new plans, buying credits or storage, large uploads, automatic follow-up texts), then read-only, then suspended. Appointment reminders, receipts and invoices to customers keep going. The owner sets the day each stage starts.

3. Is my data deleted if I stop paying?

No. A suspended account is not deleted. You can view and export everything, and paying restores everything instantly. After a long period unpaid the account is only flagged as eligible for deletion under the owner's retention policy. Nothing is deleted automatically.

4. How do I change or cancel my plan?

From the app's **Plan & billing** screen, which opens Stripe's customer portal for payment methods, invoices, switching plans and cancelling at the end of the period. The site owner can also change a plan for you.

5. Do AI credits expire?

Free daily credits refill each day. Bought credits never expire and are used after the free ones. See [ai-credits-storage-packs-shop].

6. How do homeowners pay a contractor?

By card, Apple Pay, Google Pay or bank account (ACH) on Stripe's page. The money goes to the contractor's own Stripe account, which they connect from Contractor Hub → Settings → Get paid online. Bank payments take several business days to clear and can be returned.

7. Can the phone app take a card payment?

No. The phone records payments you received another way (cash, check, other). Customers pay on the website's payment link.

8. What is autopay?

Autopay charges an invoice marked "autopay" on its due date, once, using a card or bank account the customer saved on Stripe's page. It is off for the whole site until the owner ticks **Automatic payments (autopay)**, and the customer can remove the saved method in My Projects. A decline retries on a plan the owner set, then stops.

Tips

- Use [view-as-customer-tool] to see exactly what a late-paying account sees.
- The owner can give one account a feature or free access with a reason that is kept in an audit log.

If something goes wrong

- A feature is greyed out: check the plan and the failed-payment stage.
- Payments or credits did not register: see [troubleshooting-rest-errors-and-stripe-webhooks].

FAQ: messages, texts and email

Seven quick answers about who can message whom, text rules and quiet hours, STOP, links, limits, spam folders and muting.

1. Who can message whom in the crew app?

Crew and crew leaders can message the owner and managers only. The office can message anyone on the team who has a login. Customer threads are never shown there. The owner can switch crew messages off per role.

2. Why didn't a text go out?

Common reasons: texting is not set up (Twilio or Telnyx details missing), US carriers have not approved the business registration (A2P 10DLC), the plan does not include texts, the customer opted out, the text fell in quiet hours, or the site owner's kill switch or monthly cap is on. See [troubleshooting-texts-and-email].

3. What are quiet hours?

The default is that no text goes out before 8 am or after 9 pm in the customer's local time. A reminder that would land overnight is sent at 8 pm the evening before instead. Daily limits also apply to marketing. A contractor can add a stricter rule for their state.

4. What does STOP do?

A customer who texts STOP is opted out of texts. Texting START opts them back in. Replies to your texting number are logged in the customer record and emailed to the contractor. Texts from unknown numbers become leads.

5. Is there a limit on messages?

Yes. In the crew app and in the inbox, 120 messages an hour per person. Phone messages are limited to 1000 characters. Community comments are limited to 60 an hour. Contractors' text and email sending also follows their plan allowance and any hard cap the site owner sets.

6. Why can't I send a link in a message?

Brand-new accounts cannot send links to strangers, which stops spam. You will see "New accounts can't send links yet — please describe it instead."

7. Why do my emails land in spam?

Usually the sending domain is missing records that prove the mail is real: SPF, DKIM and DMARC. Each business can run an **email check** that looks these up and tells you which one is missing. Some sending services also need a verified sender or domain. Gmail and Yahoo expect these for bulk mail.

Tips

- Marketing messages go through an approval queue when set to "ask me first".
- Tell customers what to expect before the first text.

If something goes wrong

- No reminders arrive: see [homeowner-my-calendar-and-messages] and check the contractor's reminder schedule.
- Messages blocked by an opt-out, quiet hours or a missing consent do not send until the rule is met.

Glossary of VisionScaper terms

Plain-language meanings of the words you meet in the designer, the Contractor Hub, the phone app, the shop and the admin pages.

This is an alphabetical list. Entries are written from how the product itself uses the words.

Term	What it means
A2P 10DLC	US carrier registration needed before a business can send texts. Texts can be blocked until it is approved.
Autopay	Charging an invoice marked "autopay" on its due date to a card or bank account the customer saved on Stripe's page. Off site-wide until the owner switches it on.
Badge	A medal a community member earns automatically, such as Plant Spotter or Week Streak.
Blank canvas	Clearing weeds, plants and clutter from a bed or lawn so it is clean and ready to design on (version 2.48.0).
Brief	The guided description of a project you send when you request quotes. It gets a completeness score.
Catch-up window	An owner setting that lets older accounts keep two named features until a date. Every use is labelled "grandfathered".
Change order	An extra-work document linked to a signed quote. Unsigned ones are "Not counted yet".
Comp	Free access the owner gives a contractor.
Contractor Hub	The business side of VisionScaper: customers, quotes, jobs, invoices, scheduling, messages and more.
Credit	One use of the image AI. Free daily credits come first, then plan credits, then bought credits.
Crew shell	The three-tab phone (My day, Time, Messages) given to crew and leaders.
Design	A saved yard project: your photo plus plants, materials and edits.
Designer	The homeowner-facing studio where you build a design.
Dispatch	Assigning people and times to a job, with live conflict warnings.
DKIM, SPF, DMARC	Three email records that prove your sending domain is real. Missing ones push mail toward spam.
Dream-to-Reality	A 1 to 5 score from customers for how closely the finished yard matched the design.
Entitlement	One capability, such as "Route Optimizer", that a plan includes or not.
EAS / Expo	The cloud service used to build the phone app, and its push service.
Erase & fill	The tool for selecting part of a photo and removing it or covering it with mulch, lawn or stone.
Eye level	The line in a photo at the camera's height. It sets how plants scale with distance.
Field trigger	A rule: when a field event happens, do a task, alert managers or message the customer.
Known-good look	A saved copy of the last site look that worked, kept for emergency restore.
Kill switch	An owner setting that stops all texts and emails on the site.
Level	A community rank from lifetime points: Seedling to Garden Legend.
Lock	An owner setting that stops lower layers changing a category of the site look.
Moderation	Reviewing reported community posts and members.
Name style	A cosmetic style for a member's display name, unlocked by level.
Outbox	Taps on the phone the website has not confirmed yet.
Override	A reasoned exception that gives one account a feature or a limit.
Plan matrix	The table of what each plan includes.
Plant ID	The tool that identifies a plant from a photo.
Points	The currency members earn for taking part and trade for rewards. All values are placeholders.
Push notification	An alert sent to the phone through Expo to Apple or Google.
Quiet hours	Times when texts are held. The default window is 8 am to 9 pm local time.
REST API	How the app talks to your website. Its address is your site plus /wp-json/.
Role	Owner, manager, leader or crew. Each has its own permissions.
Scale	How big things in the photo are in real life.
Shortcode	A bracketed tag like [visionscaper] that puts the app on a page.
Streak	Days in a row a member visited.
Subscriber	The WordPress user role given to customer accounts.
Title	The line under a member's name, chosen from earned levels and badges.
Webhook	A message Stripe or a provider sends your site when something happens, such as a payment.
VisionScaper Browser	The public community of shared designs.

Tips

- If a word you meet is not here, search the help center for it.
- Words with "placeholder" in the help articles are not approved values.

If something goes wrong

- A label in your app differs from this list: the label in your version is correct. Tell the site owner so the help can be updated.

What's new in versions 2.45 to 2.51

A plain-language summary of the designer changes in the most recent releases, from the changelog.

This summary comes from the plugin's changelog (readme.txt). The newest version is 2.51.0. Entries in the changelog for 2.45 to 2.51 are 2.45.0, 2.46.0, 2.47.3, 2.48.0, 2.48.1, 2.48.2, 2.49.0, 2.50.0 and 2.51.0. Nothing in this article claims these changes were tested by the help writers.

2.51.0: painted ground looks right on your own photos

- Painted materials (mulch, stone, pavers, grass) no longer break up on photos that are not the built-in samples. The depth effect uses a safe camera, so the far end of an area cannot collapse into streaks.
- Fresh photos get an automatic eye-level estimate. Depth shading and edge shadow are gentler so textures keep detail.
- Material size no longer changes on retina screens.
- New **Perspective of painted ground** slider in the Brush and Bed panels.

2.50.0: one way to outline an area

- The Add wizard, Clear-an-area wizard, Draw beds & patios and Select all share the same outline choices: **Curved edges**, **Straight edges** or **Rectangle**. The old Smart / Paint it / Outline it modes are gone.
- Fine-tune after outlining: drag white dots on the edge, tap teal "+" bubbles to add a dot, use **Remove point** and **Undo**. It works on finished beds and patios too.
- The Add wizard has a **Fine-tune the edges** button.

2.49.0: guided "Add an area"

A new wizard in the Add tool: **Where** (auto-find the bed, tap corners, or draw around it), **What** (any material from the full browser, Popular first, searchable), then see it in the photo with one-tap swaps, an edging choice and **Change the area**. It creates the same live, editable shape as the Draw tool.

2.48.x: blank canvas

- **2.48.0**: clearing weeds, plants and clutter makes the whole bed or lawn clean and ready. It finds the edge of a mulch bed itself, or you circle the part to clear. It runs in your browser with no cloud call and no cost. The button became **Clear weeds, make a blank canvas**, and a **Fix-it menu** handles "still some green", wrong color, and similar.
- **2.48.1**: blank canvas now asks what the area should become (lawn, mulch bed or soil bed), marks its guess "My best guess", and lets you tap a different one. New first question: **Find the bed for me** or **I'll circle the area**.
- **2.48.2**: the first screen says **Clear an area** and **Take out one thing**. Find the bed for me accepts only a bed it is confident is mulch. Otherwise it offers **Tap the corners** or **Draw around it**. Soil looks use library soils.

2.47.3: remove weeds, remove something, 3D depth

Weeds are tested on real photos: circle the weedy part and green plants inside are the weeds. If weeds cover about a third or more, it shows a fresh bed instead. A guided **Remove something** shows Before and After and retries up to three times. Five sample yards are available. Painted ground gets 3D depth and photo-shadow sliders.

2.46.0: selection bar and turning

- A floating bar over the picture with **Turn left**, **Turn right**, **Flip**, **Copy**, **Remove** and a green **Done**. On phones it sits at the bottom.
- A round handle above the selected item turns it as you drag, clicking at straight and square angles. Hold Shift for free turning.
- Side panel **Turn & flip**. Duplicate is now **Copy, facing the other way**.

2.45.0: scale without measuring

- **Set it up for me** finds eye level, spots a door, garage door, person or car, and shows 6-foot people to check.
- A "See it grow" slider that follows each plant's true growth curve, with **Fully grown**.
- **Clear weeds from a bed**.
- Plainer tool names: Move, Erase & fill, Add, Measure, Photo setup, Ask AI, Pan.
- A server route for the scene check uses your fal.ai key, with a daily limit per customer.

Tips

- Read [faq-designs] for answers to common questions about these tools.
- Learn the keys in [keyboard-and-gesture-cheat-sheet].

If something goes wrong

- A feature described here is missing: your site may be on an older plugin version. Check Plugins in WordPress.

Keyboard and gesture cheat sheet

Every verified shortcut, mouse action and touch gesture in the designer on one page.

Shortcuts work in the designer when no text box is focused and no dialog is open.

Pick a tool

Key	Tool
V	Move
W	Erase & fill
P	Add (Plants & things)
B	Mulch, stone & lawn
L	Draw beds & patios
M	Measure
J	Photo setup
S	Scale
C	Crop
E	Remove it
A	Ask AI
H	Pan

Edit

Keys	Does
Ctrl+Z or ⌘Z	Undo
Ctrl+Shift+Z, ⌘+Shift+Z or Ctrl+Y	Redo
Ctrl+D or ⌘D	Copy the selected item (or deselect, if an area is highlighted)
Delete or Backspace	Remove the selected item or several selected items
Esc	Cancel what you are drawing, or deselect
Enter	Finish a bed or a measurement
Backspace while drawing a bed	Remove the last point
Arrow keys	Nudge the selected item a little; hold Shift for a bigger step
[and]	Turn the selected item by 5 degrees
Shift+click	Add to a multiple selection

View

Keys	Does
+ or =	Zoom in
-	Zoom out
0	Fit the picture to the screen
Hold Space	Pan, then release
N	Toggle night

Erase & fill selection (advanced)

Keys	Does
Ctrl+A / ⌘A	Select all
Ctrl+D / ⌘D	Deselect
Ctrl+Shift+I	Invert the selection
Enter	Accept a proposal or finish an edit
Esc	Reject a proposal or cancel
Delete	Remove the selected area
Shift while selecting	Add to the selection
Alt while selecting	Subtract from it
Shift+Alt	Intersect
[and]	Make the brush smaller or larger

Keys	Does
1 to 9	Choose a selection mode (the mode names in the panel are not verified here)

Mouse and trackpad

- **Wheel or trackpad pinch**: zoom around the pointer, only while over the picture.
- **Drag** with the Pan tool, or hold Space and drag.
- **Right-click** an item or an area: opens a menu of what you can do there.
- **Double-click** a shape point to remove it (Move tool). In Erase & fill, double-click finishes an outline.
- **Turn handle**: drag the round handle above a selected item. It clicks at straight and square angles. Hold Shift for free turning.

Touch

- **Pinch** to zoom and drag with two fingers to pan.
- **Press and hold** (about half a second) in Erase & fill to open the context menu, with a small buzz on supported phones.
- Other tools keep press-and-hold for dragging.
- The selection bar sits at the bottom on small screens with Turn left, Turn right, Flip, Copy, Remove and Done.

Other screens

- **Esc** closes most pop-up windows.
- Address and search lists: **Up** and **Down** move through results, **Enter** picks, **Esc** closes.
- Before and after sliders: **Left** and **Right** arrows move the divider.
- Tabs: **Left** and **Right** arrows move between some tabs.

Tips

- Press 0 any time you get lost after zooming.
- Wheel zoom only works while the pointer is over the picture, so the rest of the page scrolls normally.

If something goes wrong

- A key does nothing: click the picture first so no text box has focus, and close any dialog.

Troubleshooting: blank studio, camera not working, caching and minify

Fix a studio that stays blank, a camera that will not open, and caching or minify plugins that break the designer.

Use this when the designer does not open, shows a blank area, or cannot use the camera.

A. The studio is blank or the button does nothing

What the page needs

The designer loads one script, `assets/js/app.js`, as a JavaScript module, and a small settings block. Both are added by the `[visionscaper]` shortcode.

Steps

1. Open the page in the WordPress editor and check it contains `[visionscaper]` (designer) or `[visionscaper mode="hub"]` (Contractor Hub). A link to `#visionscaper`, or any element with the attribute `data-visionscaper-open`, opens the app on a page that has the shortcode.
2. Look for a caching or minify plugin. Its job is to combine and shrink JavaScript. The plugin's own readme says: exclude the plugin's `assets/js/*.js` files from JavaScript combining and minification, because they are ES modules.
3. In the same plugin, clear the cache, then reload the page with the cache bypassed (Ctrl+Shift+R or ⌘+Shift+R).
4. Try the page in a private window with extensions off. Ad blockers and privacy extensions can block scripts.
5. Open your browser's developer tools (Console tab) and look for red errors. Send them to whoever manages your site.
6. Check your theme or page builder is not stripping `<script type="module">` tags.

> Note: after an update, script addresses carry the plugin version, so a refreshed page loads new files. A stale page cache can still serve an old page that points at old files. Clear the page cache once after updating.

B. Designs will not save

You may see: "This browser is blocking storage, so designs can't be saved (private mode?)." Open the site in a normal window, allow site data, or sign in so designs save online.

C. The camera will not open

What happens

The live camera needs the page to load over https and needs the browser's permission. If the camera is unavailable or permission is refused, VisionScaper falls back to the phone's photo picker, so you can still pick a photo.

Steps

1. Confirm the address starts with https.
2. When the browser asks, allow the camera. If you refused earlier, open the site's permissions in the browser and allow Camera.
3. Close other apps that may be using the camera.
4. If it still will not open, use the photo picker instead and take the photo with the phone's normal camera app.
5. If the picture will not open, use a JPG. On iPhone: Settings → Camera → Formats → Most Compatible.
6. On iPhone the tilt sensor asks for permission. Allowing it sets the eye-level line from how you held the phone. If you refuse, the line is a guess you can drag.
7. Make sure nothing covers the lens, and take the photo with the camera rather than saving a screenshot or a picture from a message.

D. Bird's-eye view finds nothing

You will see "There are no aerial photos for this address. Take or upload a photo instead." Try the street address again with the town and state, or use a photo.

Tips

- Exclude `/wp-json/dreamscaper/*` from page caching too. See [troubleshooting-rest-errors-and-stripe-webhooks].
- Keep a note of which cache plugin you use so you can reapply the exclusions after switching hosts.

If something goes wrong

- Still blank after all steps: disable the caching plugin for a moment. If the studio opens, the exclusions are the problem.
- Only the Contractor Hub is blank: check the page uses `mode="hub"` and that your account is approved as a contractor.

Troubleshooting: REST errors and Stripe webhooks not received

Find why app calls fail with REST errors, and why Stripe payments or subscriptions are not registering.

The designer, the Contractor Hub and the phone app all talk to your website through its REST address, `/wp-json/dreamscaper/v1/`. If that address is blocked or cached, many things fail at once.

A. REST errors

Quick test

1. In a browser, open `https://your-site/wp-json/`. You should see a block of text, not a 404 or a login page.
2. If you get a 404, open WordPress **Settings → Permalinks** and click Save once.
3. If a security or cache plugin blocks it, allow `/wp-json/dreamscaper/*` and exclude it from page caching.

Messages and what they mean

Message or code	Meaning
"Your sign-in on this device has ended. Please sign in again." (401)	The phone's key expired or was signed out
"Please sign in first." (401)	The action needs an account
Error code FEATURE_NOT_INCLUDED	The contractor's plan does not include it
SUBSCRIPTION_REQUIRED	No subscription record yet
USAGE_LIMIT_REACHED	An allowance is used up
SUBSCRIPTION_INACTIVE	Paused, cancelled, trial over, or payment too late
"Test view: billing actions are switched off…" (403)	An administrator is in View as customer
"Too many tries…", "Slow down a little…", "Please wait a bit…" (429)	A rate limit
"Phone sign-in needs a secure (https) website." (403)	The site is on http

The Entitlements admin page keeps the last 50 refusals with the account, route and code. See [entitlements-admin-page].

Other checks

- Mixed content: if the site address in WordPress is http but you browse over https, calls can fail. Make both https.
- A web firewall may block POST requests with JSON. Ask your host.
- Follow-ups and reminders run through WP-Cron. On a low-traffic site set a real cron job to call `wp-cron.php` so they go out on time.

B. Stripe webhooks not received

VisionScaper has two webhook jobs: shop purchases (credits, storage) and contractor subscriptions and payments. They share the address `https://your-site/wp-json/dreamscaper/v1/stripe`. Follow Stripe's current instructions for adding an endpoint.

Steps

1. In Stripe, confirm an endpoint exists with that exact address.
2. Check the events: `checkout.session.completed` for the shop, plus the subscription events on the Plans page (`customer.subscription.created`, `customer.subscription.updated`, `customer.subscription.deleted`, `invoice.paid`, `invoice.payment_failed`) and, for contractor payments, `checkout.session.async_payment_succeeded`, `checkout.session.async_payment_failed` and `account.updated`.
3. Copy the endpoint's **signing secret** into **Settings → VisionScaper → Stripe webhook signing secret**. The test-mode and live-mode endpoints have different secrets.
4. Make sure the secret key and webhook are from the same mode (test with test, live with live).
5. Look at Stripe's delivery log for your endpoint and read the response.

What the response means

Response	Meaning
"Not configured." (400)	The signing secret or the signature header is missing
"Bad signature." (400)	The secret is wrong, or the message is more than 10 minutes old. Check your server clock
received, ignored	A duplicate or older message was skipped on purpose

Credits or storage did not arrive

Credits are also confirmed when the customer returns to your site after paying, so a missed webhook does not lose a purchase. Ask the customer to open the site once more in the same browser. A purchase is applied only once.

Tips

- Never paste secret keys in a message or screenshot.
- After changing a key, save the settings and retest with a small purchase in test mode.

If something goes wrong

- Still failing: save the exact message and the time, and check your host's error log or firewall.

Troubleshooting: texts not sending and emails going to spam

Work through why texts are not sent or received, and why emails land in spam or never arrive.

Texts and emails pass through several gates. Work through them in order.

A. Texts are not sending

1. **Is texting set up?** Under **Settings → VisionScaper**, the **Text messages (Twilio)** section needs the Account SID, Auth Token and phone number (or Messaging Service SID). On **Settings → VisionScaper Messaging**, **Text service** can be Twilio or Telnyx. Follow each provider's current sign-up instructions.
2. **Is the business registered?** US carriers require A2P 10DLC registration. Texts are blocked until it is approved. If the owner ticked "Only let a business text after its "Get ready to text" details are approved", the business must submit its details and the owner marks it **Approved by carriers** on the Messaging page.
3. **Is the kill switch on?** The Messaging page has **Stop all texts and emails on this site (kill switch)**.
4. **Is there a monthly cap? Most texts per business per month** (0 = no limit).
5. **Does the plan include texts?** Text messages are a plan feature. Check the Entitlements page (see [entitlements-admin-page]).
6. **Failed payment?** In the restricted stage, automatic follow-up texts pause. Appointment reminders keep going.
7. **Quiet hours.** The default holds texts before 8 am and after 9 pm in the customer's local time. A reminder that would land overnight is sent at 8 pm the evening before.
8. **Opted out.** If the customer texted STOP they will not get texts. They can text START.
9. **Timing.** Follow-ups go out through WP-Cron, about every 5 minutes. On a quiet site set a real cron job to call `wp-cron.php`.

B. Replies are not showing

In the provider's console, set the number's incoming-message webhook to the address shown under **Settings → VisionScaper → Text messages (Twilio)** (HTTP POST). Replies are then logged in the customer record and emailed to the contractor. For Telnyx the Messaging page shows its own webhook address.

C. Emails go to spam or never arrive

Site emails (sign-up notices, receipts, password resets)

These use your site's own email by default. Install and set up an SMTP plugin or service so they are properly sent. The launch checklist lists this as a step you do before launch.

Marketing and bulk emails

1. Open **Settings → VisionScaper Marketing** and **Settings → VisionScaper Messaging**. Choose an email service: Postmark (the recommended one on the Marketing page), Resend, SendGrid or Amazon SES. Paste its keys and webhook secret.
2. Use a verified sender or domain with your provider.
3. Add the DNS records your provider gives you. For Postmark, DKIM and Return-Path records. Also publish a DMARC record. The page says Gmail and Yahoo require it for bulk mail.
4. In the Contractor Hub's messaging settings, run the **email check**. It looks up SPF, DKIM and DMARC for your sending domain and tells you which is missing. Each missing item has a hint, for example: add a TXT record on `_dmarc.yourdomain` with `v=DMARC1; p=none; rua=mailto:you@yourdomain`.
5. The owner may require the email check to pass before a business can send marketing email.
6. Every marketing email carries who you are, a real mailing address and a way to opt out.

If someone marks an email as spam or it hard bounces, that contact is marked and removed from future sends.

Tips

- Send a test to your own Gmail and check where it lands.
- Ask customers to add your sending address to their contacts.
- If "No sender email is set up yet", the site administrator sets it in Settings → VisionScaper Marketing.

If something goes wrong

- Texts still blocked: your carrier registration may be pending. Wait for the provider's approval.
- Emails still in spam: check all three DNS records show as present, then give it time. Sending reputation builds slowly.

Admin screens, field by field

Every box on every VisionScaper admin and Hub screen: what it does and what to enter.

Start here: every admin screen, step by step

A map of every WordPress and Contractor Hub screen in VisionScaper, with a link to the step-by-step article that explains each box and what it does.

Use this page when you are looking at a screen and want to know what a box does. Find the screen below, open its article, and read the table called **Fields**. Every box has its own row: what it does for VisionScaper, what to enter with an example, and the default.

How each article is laid out

1. **What you see**: what the screen looks like when you open it.
2. **Fields**: one row per box, switch or button.
3. **Steps**: the order to do things in, with the exact buttons to press.
4. **Tips** and **Troubleshooting**: the usual mistakes and fixes.

Before you start

- Screens under **Settings** in the WordPress menu are for the site owner (an administrator).
- Screens inside the **Contractor Hub** are for each landscaping company that uses VisionScaper.
- Prices, allowances, margins, plan assignments and point values that ship with VisionScaper are placeholders, not approved. Set your own before you go live.
- Any box that needs a key, secret or token has a matching guide in How to get each API key.

Settings → VisionScaper (the main settings page in WordPress)

- Settings → VisionScaper: Basics, emails and maps
- Settings → VisionScaper: Customer accounts and sign-in
- Settings → VisionScaper: AI keys and daily limit
- Settings → VisionScaper: Selling extra AI credits
- Settings → VisionScaper: Selling extra library storage
- Settings → VisionScaper: Community switches
- Settings → VisionScaper: Points and rewards
- Settings → VisionScaper: Contractor tools and Twilio
- Settings → VisionScaper: Phone app, voice, walk and autopay switches
- Settings → VisionScaper: Door-to-door map and aerial imagery
- Settings → VisionScaper: Contractor payments and fees
- Settings → VisionScaper: Library packs, photos and recent purchases

Settings → VisionScaper Community, Contractors, Terms, Records and Appearance

- Community screen: overview and totals
- Community: the Needs review table
- Community: the Latest posts table
- Community: Members, Ban, Unban and Give points
- How community moderation actions work
- Contractors screen: approve, suspend or reject applications
- Contractor statuses and the emails they trigger
- Terms editor: the Save terms form
- Terms: formatting codes and how acceptance is recorded
- Records screen: look up a customer
- Records screen: Disputed, Active, Removed and Save
- Appearance screen: status and emergency buttons

Settings → VisionScaper Messaging, AI Receptionist and Marketing

- Messaging settings: Texts section
- Messaging settings: Email section
- Messaging settings: Safety section
- Messaging settings: Prices and message packs
- Messaging settings: Businesses waiting for text approval
- AI Receptionist settings: Keys section
- AI Receptionist settings: Prices and packs

- AI Receptionist settings: Privacy and safety
- Marketing settings: Email service and sender
- Marketing settings: Texts and missed calls
- Marketing settings: Costs and limits

Settings → VisionScaper Plans and Entitlements

- Plans page: billing switch, free trial and trial allowances
- Plans page: what happens when a payment fails
- Plans page: Stripe setup list and the Save and Create buttons
- Plans page: plan names, taglines, badge, included lists, prices and Stripe IDs
- Plans page: the limit rows (credits, storage, customers, employees and more)
- Plans page: the feature switch rows (checkboxes per plan)
- Plans page: the Contractors table and owner actions
- Entitlements page: how VisionScaper decides who may do what
- Entitlements page: how to read the plan matrix (feature registry)
- Entitlements page: Plan matrix number boxes (limits and monthly allowances)
- Entitlements page: Plan matrix checkboxes (feature switches)
- Entitlements page: Prices & upgrade destination
- Entitlements page: give one account a feature or take it away
- Entitlements page: the catch-up window
- Entitlements page: Audit log and Recent refusals
- View as customer: test the Hub on any plan or billing state

Contractor Hub → Settings: business, look, services, tools, costs, price book and terms

- Settings → Business profile: every field
- Settings → Appearance & layout: scope, search and Look tab
- Settings → Appearance & layout: Colors tab (all 33 colors)
- Settings → Appearance & layout: Text and Shape & spacing tabs
- Settings → Appearance & layout: Layout tab
- Settings → Appearance & layout: save, publish, history and site controls
- Settings → Social & gallery: links and work gallery
- Settings → Services: templates list, versions and job profit
- Service template editor: every field
- Settings → Show me & tools: Simple/Full and ten tool switches
- Settings → Costs & markups: every cost, markup and tax box
- Settings → Price book: beds, stone, edging, sod, seed, grading, delivery, cleanup
- Settings → Price book: pavers, gravel path, retaining wall, boulders, fence
- Settings → Price book: plants, removals, landscape lighting
- Settings → Terms & payments: proposal terms and payment schedule
- Hub Settings: groups, tabs and the search box

Contractor Hub → Settings: follow-ups, invoices, payments, crew, messages, reminders, intake, connected apps and API keys

- Settings → Follow-up plan: every field explained
- Settings → Invoice design: look, sections and details
- Settings → Invoice design: default content and reminder plan
- Settings → Get paid online: Stripe, Instant Payout and text messages
- Settings → Crew, team & hours: crew list, private notes and working hours
- Settings → Crew, team & hours: team permissions grid
- Settings → Messages & alerts: the message editor, field by field
- Settings → Messages & alerts: every message and every detail code
- Settings → Reminders: every field explained
- Settings → Intake questions: every field explained
- Settings → Quick replies: every field explained
- Settings → Connected apps: overview and Google Contacts
- Settings → Connected apps: QuickBooks Online and Send to QuickBooks
- Settings → Connected apps: Xero card, field by field
- Settings → Connected apps: Request form, self-booking and spam protection
- Zapier & API keys: Access keys and Alerts to other tools

- Zapier & API keys: the Zapier and How it works tabs
- Current plan, usage and credits: every control explained

Contractor Hub forms: customers, quotes, jobs, calendar, invoices, crew, purchasing, inventory, equipment, marketing, training

- Employee and crew member form, pay rate and permissions
- Vendor and purchase order forms
- Supplier bill form
- Inventory forms: item, count, move, set aside, place, import
- Task form, quick expense and clock-in forms
- Service template form
- Equipment item and maintenance forms
- Checklist (field form) editor
- Marketing campaign, audience and automation forms
- Training course builder and Assign dialog
- Door-to-door house form and Measure property forms
- Customer form: every field
- Property and activity-note forms
- Lead and request intake: Request sources
- Quote builder: customer, design and estimate lines
- Quote builder: customer proposal, payments and terms
- Quote builder: Send for signature and follow-ups
- Job card and job costing fields
- Calendar visit and booking form
- Invoice form: every box

The Designer and homeowner screens

- Designer: Mulch, stone & lawn brush controls
- Designer: Draw beds & patios (Shapes) controls
- Designer: Selected plant or feature panel
- Designer: Scale and eye-level controls
- Designer: Crop, straighten and Adjust controls
- Designer: Measure & zones and the scene bar
- Designer: Plant library search, filters and zone finder
- Designer: Add my own item and Plant ID fields
- Designer: Remove it, Pick the spot and fill controls
- Designer: Design with AI controls
- Designer: Layers, saved versions, My designs and tags
- Designer: Send my design, Share and consultation forms
- Designer: Sign in, create account and My Account fields
- Request quotes: every question in the wizard
- Find a Local Contractor, property photos, reviews and homeowner screens
- Inspiration Board, Community Browser and post fields

More screens

- AI Quoter: every field and button
- Hub search box, New button and guided tours
- Customer financing: every setting and button
- Route planner: every field and button
- Website chat: every setting and button
- Security screen: two-step sign-in, history and activity log
- Card reader and Review replies: every field and button
- Public forms: website request form, review page and sign-in code
- AI Receptionist in the Hub: the six setup steps and Settings tab
- AI Receptionist in the Hub: calls, campaigns, safety and do-not-call
- Marketing Safety: consent, sending rules, auto-replies and carrier registration
- Hub Marketing settings: controls, limits, design, reviews and automations
- Field work Settings tab: hours, late jobs, photos, job costing and alerts
- Landscape plan wizard: customer, scope, measurements, scale, site details and style

- Marketing reminders: group-posting rules (Add a group)
- Marketing reminders: personal reminders and the post helper
- Marketing campaigns: template picker, Insert detail, blocks and design extras
- Marketing consent tab: sign-up link, search, ask by text, paste a list, proof
- Training: Assigned list, extra quiz attempts, To check (grading) and certificates
- Training: Talks (toolbox talks), Library procedures and file uploads
- Training: New hires checklists, People (skills, roles) and Reports
- Training settings: reminders, renewals, badges and automatic assignment rules
- Training course builder: step kinds, captions, files, move and remove controls
- Training for employees (My work): practical hand-in, quizzes, procedures, rating, record
- Goals and reviews: every box for goals, progress notes and written reviews
- Company library: documents, who must agree, version notes and reminders
- Equipment, Inventory and Request sources: custom fields, parts note, who did it, search and CSV
- Postcards: audience, card text, QR code, cost approval and settings
- Review request page: star buttons, private feedback box and what happens after
- Site plan editor: toolbar, drawing options and item properties
- Plan wizard steps 3 and 4: bird's-eye base map and tracing the property
- Plan wizard steps 6, 9 and 10: site photos, designs and generate
- Invoice editor extras: line details, discount label, custom fields, footer and licence line
- Hub customer, quote, job and search boxes: the hint text in each box
- Quick add forms, door-to-door hints and the homeowner property capture
- Search, find and name boxes: message details, intake examples, key name, Xero fields, appearance
- Designer boxes: design name, hardiness zone, spacing, notes, tags, angles and compare slider
- Public pages: proposal sign page, join-the-list page and unsubscribe page
- Website quote shortcode form: Request my quote
- Visitor chat window: Your name, Phone, Email, How can we help, Type a message
- Plant ID: whole plant, leaf, flower, fruit or bark (the organs value)
- Admin pages re-scan: where every remaining input is documented

Settings → VisionScaper: Basics, emails and maps

Every field in the Basics block: your name, home region, notification email, email switches and map or routing keys.

Open the WordPress dashboard and go to **Settings → VisionScaper**. Only users who can manage options (administrators) see this page. The top of the page explains the two shortcodes: put `[visionscaper]` on the Designer page and `[visionscaper mode="hub"]` on the Contractor Hub page. Any link to `#visionscaper`, or any element with the attribute `data-visionscaper-open`, opens the app. This article covers the first block of the form: Basics, the three email switches, and the three map and routing fields.

Before you start

- An email address you check often.
- Optional: a Google Maps key (see get-google-maps-keys) and, only if you host one, an OSRM server address.

Fields

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Business name `brand`	Your business name. It is used as the business name on contractor CRM documents, in the terms text, and on the footer of shared design images ("Made with VisionScaper by ...").	Your company name, e.g. Green Row Landscaping.	text; default VisionScaper
Home region (for plant advice) `home_region`	The state used for plant advice and for address lookups when a visitor has not said where they are. Visitors who give a state get advice for their own state.	A US state name or abbreviation, e.g. Ohio or OH.	text; default Connecticut
Short name (for “Send to ...” button) `short_brand`	A short form of your name. It is passed to the app as the short brand (the label on the send button) and used as the contact name in CRM documents.	A short name, e.g. Green Row.	text; default VisionScaper
Website shown on saved images `site`	Shown after the business name in the footer of saved/shared design images and used as the website in CRM documents.	Your web address without https://, e.g. greenrow.com.	text; default visionscaper.com
Send designs and leads to `notify_email`	The address that receives designs sent by customers, AI design emails, sign-up alerts, purchase alerts and community post/report alerts. If blank, those emails are not sent.	One email address you read often.	email; default (blank)
Let customers send their finished design to you (“Send to VisionScaper”) `share`	Turns the customer send-design button on or off. When off, the server refuses sends with “Sharing is turned off.”	Tick to allow, untick to stop.	checkbox; default on (1)
Email me every VisionScaper AI design (before/after + customer details) `ai_lead_email`	Emails the notify address each time a customer makes an AI design, with the customer's name, email, phone and address.	Tick to receive them. Needs an address in Send designs and leads to.	checkbox; default on (1)
Email me when someone creates an account `notify_signup`	Emails the notify address when a new customer account is created (name, email, how they signed up).	Tick to receive them. Needs an address in Send designs and leads to.	checkbox; default on (1)
Google Maps API key (optional) `maps_key`	Turns on Google address autocomplete and Explore in 3D. Without it, addresses autocomplete from OpenStreetMap. The key is also used for the Route planner when no server key is set.	Paste the key. See get-google-maps-keys. Leave dots to keep the saved key.	password (secret); default (blank)
Google server key for the Route planner (optional) `maps_server_key`	A second Google key used on your server for driving distances and nearby restaurants and gas prices in the Route planner. If empty, the Maps key above is used.	Paste a key restricted to your server's IP address. See get-google-maps-keys.	password (secret); default (blank)
OSRM routing server (optional) `osrm_url`	Address of an OSRM server you host, used for driving distances when no Google key is set. Must start with https:// or it is saved blank. With neither, the planner estimates road miles from straight-line distance.	e.g. https://osrm.example.com	text (URL); default (blank)

Steps

1. Go to **Settings → VisionScaper**.
2. Under **Basics**, fill in Business name, Home region, Short name and Website, then Send designs and leads to.
3. Under **Emails to you**, tick the emails you want.
4. Optionally paste your Google keys or OSRM address (see table).
5. Press **Save Changes** at the bottom of the form. Secret boxes show 12 dots when a value is saved. Leave the dots alone to keep the saved value. Type a new value to replace it. Check the “Settings saved” notice.

Tips

- Use a real inbox for Send designs and leads to. The three email switches and the purchase and community emails all depend on it.
- Keep the Maps key restricted to your website, as the page advises.
- Without any key, address autocomplete still works using OpenStreetMap.

If something goes wrong

- No emails arrive: check that Send designs and leads to is filled in and that the matching tick box is on. Also check your spam folder.
- OSRM address vanished after saving: it must start with https://. Anything else is saved blank.
- Autocomplete or 3D not Google-powered: confirm the key is saved and that the right Google services are enabled for it (see get-google-maps-keys).

Settings → VisionScaper: Customer accounts and sign-in

Set free storage per customer and the Google and Facebook sign-in keys.

Open the WordPress dashboard and go to **Settings → VisionScaper**. Only users who can manage options (administrators) see this page. The **Customer accounts** block sets how much online storage each customer gets and holds the keys for **Sign in with Google** and **Sign in with Facebook**. Anyone can design without an account (saved on their device). Signing in saves designs online and unlocks the AI features. Customer accounts are normal WordPress Subscriber accounts and never see wp-admin.

Before you start

- For Google: a Google Cloud project with an OAuth client (see get-google-sign-in-keys).
- For Facebook: a Meta app (see get-facebook-login-keys).
- The page shows the exact redirect address to copy into each provider. Copy it from the page; it is built from your site address.

Fields

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Online storage per customer (MB) `cloud_mb`	The free online storage every signed-in customer gets for saved designs and My Library. Saved value is limited to 20–5000.	A number of megabytes, e.g. 300.	number; default 300
Google Client ID `google_id`	With the secret, turns on the Sign in with Google button.	Paste the OAuth Client ID. See get-google-sign-in-keys.	text; default (blank)
Google Client secret `google_secret`	The matching secret for Google sign-in.	Paste the Client secret. Leave dots to keep.	password (secret); default (blank)
Facebook App ID `facebook_id`	With the secret, turns on the Sign in with Facebook button.	Paste the App ID. See get-facebook-login-keys.	text; default (blank)
Facebook App secret `facebook_secret`	The matching secret for Facebook sign-in.	Paste the App secret. Leave dots to keep.	password (secret); default (blank)

Steps

1. Go to **Settings → VisionScaper → Customer accounts**.
2. Set **Online storage per customer (MB)**.
3. For Google, follow the four numbered notes on the page, adding the shown redirect address under Authorized redirect URIs. Paste Google Client ID and Google Client secret.
4. For Facebook, follow the numbered notes, adding the shown redirect address to Valid OAuth Redirect URIs. Paste Facebook App ID and Facebook App secret.
5. Press **Save Changes**. Secret boxes show 12 dots when a value is saved. Leave the dots alone to keep the saved value. Type a new value to replace it.
6. Open your Designer page signed out and look for the sign-in options to confirm.

Tips

- You can use only email sign-in by leaving the provider boxes blank.
- Provider apps must be published/live before the public can use them; follow the provider's current instructions.

If something goes wrong

- Provider says redirect mismatch: copy the redirect address from the page exactly, including the full query part.
- Customers cannot sign in: re-check the ID and secret for stray spaces.

Settings → VisionScaper: AI keys and daily limit

Every field in the AI block: Black Forest Labs, fal.ai, vision model, Pl@ntNet and the daily AI limit.

Open the WordPress dashboard and go to **Settings → VisionScaper**. Only users who can manage options (administrators) see this page. The **AI** block holds the service keys behind VisionScaper AI, Smart Select, identification and the AI limit. AI features only work for signed-in customers. Signed-out visitors see them greyed out with a “Sign in to use AI” prompt.

Before you start

- A Black Forest Labs key with credits (get-black-forest-labs-key).
- A fal.ai key (get-fal-ai-key).
- A Pl@ntNet key (get-plantnet-key).

Fields

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Black Forest Labs API key `bfl_key`	Powers VisionScaper AI and the AI Erase, Make it real and Season & Light tools. Also required for the credit store to be on.	Paste the key. See get-black-forest-labs-key.	password (secret); default (blank)
BFL model `bfl_model`	The model name sent to Black Forest Labs. The page says to leave it as flux-2-klein-4b. Saved lower-case with only letters, numbers, dots and hyphens; blank resets to the default.	Leave the default.	text; default flux-2-klein-4b
AI image generations per customer per day `ai_daily`	Free AI image generations each signed-in customer gets per day. Every VisionScaper AI design, tweak and AI-tool edit uses one; Smart Select and Identify are free. Saved range 0–500.	A whole number, e.g. 10.	number; default 10 (placeholder, not approved)
No daily limit for site administrators (for testing) `ai_owner_unlimited`	Lets WordPress administrators skip the daily AI limit.	Tick to allow testing without limits.	checkbox; default on (1)
fal.ai API key `fal_key`	Powers AI Smart Select and identifying garden items and materials. It also drives voice-note summaries, estimate from a walk and community picture checks, and marketing text features.	Paste the key. See get-fal-ai-key.	password (secret); default (blank)
Vision model (fal any-llm) `vision_model`	The text/vision model name sent to fal.ai's any-llm service for identify, marketing, community checks and the phone-app AI features.	Leave the default unless told otherwise. See get-vision-model-key.	text; default google/gemini-2.5-flash
Pl@ntNet API key `plantnet_key`	Powers plant and weed identification.	Paste the key. See get-plantnet-key.	password (secret); default (blank)

Steps

1. Go to **Settings → VisionScaper → AI**.
2. Paste the Black Forest Labs API key. Leave **BFL model** as it is.
3. Set **AI image generations per customer per day**. Tick or untick the administrator box under **Your account**.
4. Paste the fal.ai API key. Leave **Vision model** as it is unless you know you need another.
5. Paste the Pl@ntNet API key.
6. Press **Save Changes**. Secret boxes show 12 dots when a value is saved. Leave the dots alone to keep the saved value. Type a new value to replace it.

Tips

- Provider prices quoted on the page change; check the provider's current pricing.
- A daily limit of 0 means no free AI images for customers (effect on bought credits not verified in code).

If something goes wrong

- AI tools stay greyed out: the customer must be signed in, and the matching key must be saved.
- Out of credits at the provider: add credits in your provider account.

Settings → VisionScaper: Selling extra AI credits

Set up the Stripe-powered store where customers buy more AI credits.

Open the WordPress dashboard and go to **Settings → VisionScaper**. Only users who can manage options (administrators) see this page. The **Selling extra AI credits** block controls the store customers use when their free daily credits run out. They pay on Stripe's hosted checkout page. Purchased credits never expire and are used after the free ones.

Before you start

- A Stripe account (see get-stripe-keys).
- A Black Forest Labs key saved in the AI block. The store appears only when the store tick box, a Stripe secret key and a Black Forest Labs key are all present.

Fields

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Let customers buy extra AI credits `shop_on`	Switches the credit store on. The store only appears when this is ticked AND a Stripe secret key AND a Black Forest Labs key are saved.	Tick to sell credits.	checkbox; default on (1)
Email me about each purchase `shop_notify`	Emails the notify address for each purchase. Needs an address in Send designs and leads to.	Tick to receive purchase emails.	checkbox; default on (1)
Stripe secret key `stripe_secret`	Lets VisionScaper create Stripe checkout pages. Also used by the storage store, autopay and contractor payments.	Paste sk_test_... or sk_live_.... See get-stripe-keys.	password (secret); default (blank)
Stripe webhook signing secret `stripe_webhook`	Lets VisionScaper verify Stripe's confirmation messages.	Paste whsec_.... See get-stripe-keys.	password (secret); default (blank)
Credit packs `shop_packs`	The packs shown in the store. One pack per line: Name	credits	price in dollars. Lines with fewer than 3 parts, 0 credits or a zero price are ignored. Up to 4 packs look best.
Price per single credit ($) `shop_each`	Price for customers who buy a custom number of credits. 0 means only packs are sold. Saved with two decimals, minimum 0.	Dollars per credit, or 0.	number; default 0.25 (placeholder, not approved)
Minimum custom purchase (credits) `shop_min`	Smallest custom purchase. Saved as at least 1. The app caps a custom purchase at 500 credits.	A whole number, e.g. 5.	number; default 5 (placeholder, not approved)

Steps

1. Go to **Settings → VisionScaper → Selling extra AI credits**.
2. Copy the webhook address shown in the numbered notes (it ends in /dreamscaper/v1/stripe) into Stripe, with event `checkout.session.completed`.
3. Paste Stripe secret key and Stripe webhook signing secret.
4. Edit Credit packs, one per line.
5. Set the single-credit price and minimum.
6. Tick **Let customers buy extra AI credits** and decide on the purchase email.
7. Press **Save Changes**. Secret boxes show 12 dots when a value is saved. Leave the dots alone to keep the saved value. Type a new value to replace it. Make a small test purchase with a Stripe test key first.

Tips

- All shipped prices are placeholders, not approved.
- Credits are also confirmed when the customer returns, so a missed webhook never loses a purchase (stated on the page).
- Recent purchases appear in a table lower on the page (see settings-library-packs-and-purchases).

If something goes wrong

- Store not visible: check all three requirements above.
- A pack is missing: lines need three parts split by | with credits of at least 1 and a price above 0.

Settings → VisionScaper: Selling extra library storage

Turn on the one-time storage store and set your storage packs.

Open the WordPress dashboard and go to **Settings → VisionScaper**. Only users who can manage options (administrators) see this page. The **Selling extra library storage** block lets signed-in customers buy more online space for designs and My Library. It uses the same Stripe account as the credit store. Storage never expires and is added as soon as Stripe confirms payment.

Before you start

- Stripe keys saved (see settings-selling-ai-credits).
- A non-zero free storage amount in Customer accounts.

Fields

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Let customers buy extra storage `storage_on`	Switches the storage store on. It needs a Stripe secret key and a non-zero free storage amount.	Tick to sell storage.	checkbox; default on (1)
Storage packs `storage_packs`	The storage packs. One per line: Name	megabytes	price in dollars (1 GB = 1024 MB). Invalid lines are ignored.

Steps

1. Go to **Settings → VisionScaper → Selling extra library storage**.
2. Tick **Let customers buy extra storage**.
3. Edit **Storage packs**: one per line as Name | megabytes | price in dollars.
4. Press **Save Changes**.

Tips

- 1 GB = 1024 MB. A Plant ID plant uses about 0.2–0.5 MB; a VisionScaper about 1–4 MB (page text).
- Shipped packs and prices are placeholders, not approved.

If something goes wrong

- Store missing: it needs a Stripe secret key and a non-zero storage amount.
- A pack missing: check the three-part line format.

Settings → VisionScaper: Community switches

The community on/off, member emails, AI picture checks and report threshold.

Open the WordPress dashboard and go to **Settings → VisionScaper**. Only users who can manage options (administrators) see this page. The **Community (VisionScaper Browser)** block switches the community on and sets moderation. Posts go live immediately. Anything reported by several members is hidden until you review it under **Settings → VisionScaper Community**.

Before you start

- A fal.ai key if you want the AI picture check.
- A notification address for the admin emails.

Fields

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Turn on the community, points and rewards `community_on`	Master switch. When off, no points are awarded.	Tick to run the community.	checkbox; default on (1)
Email members about new messages and comments (they can turn this off) `community_email`	Allows emails to members about messages and comments, only to members whose own preference is on.	Tick to allow member emails.	checkbox; default on (1)
Check posted pictures with AI before they go live (uses your fal.ai key, about $0.001 each) `community_ai_check`	Runs an AI picture check on community posts. It only runs if a fal.ai key is saved.	Tick to check pictures.	checkbox; default on (1)
Email me about every new community post `community_notify_admin`	Emails the notify address for every new community post. Needs an address in Send designs and leads to.	Tick to receive them.	checkbox; default on (1)
Hide a post after this many reports `community_hide_at`	A post is hidden once it has at least this many reports, and stays hidden until you review it. Saved range 1–20.	A whole number 1–20.	number; default 3

Steps

1. Go to **Settings → VisionScaper → Community (VisionScaper Browser)**.
2. Tick or untick the four boxes in the **Community** row.
3. Set **Hide a post after this many reports** (1–20).
4. Press **Save Changes**.
5. Review hidden posts under **Settings → VisionScaper Community**.

Tips

- Turning the community off also stops points being awarded.

If something goes wrong

- No admin emails: the notify address must be filled in on Basics.
- AI check not running: it runs only with a fal.ai key saved.

Settings → VisionScaper: Points and rewards

Set how many points each community action earns and what points can be traded for.

Open the WordPress dashboard and go to **Settings → VisionScaper**. Only users who can manage options (administrators) see this page. The **Points** and **Rewards** blocks set point values and redeem prices. The daily and once-only limits in each label are built into the code and cannot be changed here. Every default value is a placeholder, not approved; set your own.

Before you start

- The community switched on.

Fields

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Daily visit (once a day) `pts_signin`	Points a member earns for this action. The daily limits in the label are built into the code. Whole number, minimum 0.	Whole number of points; 0 gives none.	number; default 5 (placeholder, not approved)
First design (once) `pts_first_design`	Points a member earns for this action. The daily limits in the label are built into the code. Whole number, minimum 0.	Whole number of points; 0 gives none.	number; default 50 (placeholder, not approved)
Each new design (up to 3 a day) `pts_design`	Points a member earns for this action. The daily limits in the label are built into the code. Whole number, minimum 0.	Whole number of points; 0 gives none.	number; default 10 (placeholder, not approved)
Sharing a design to the community (up to 3 a day) `pts_post`	Points a member earns for this action. The daily limits in the label are built into the code. Whole number, minimum 0.	Whole number of points; 0 gives none.	number; default 25 (placeholder, not approved)
Each like received (up to 25 a day) `pts_like`	Points a member earns for this action. The daily limits in the label are built into the code. Whole number, minimum 0.	Whole number of points; 0 gives none.	number; default 2 (placeholder, not approved)
Each comment (up to 10 a day) `pts_comment`	Points a member earns for this action. The daily limits in the label are built into the code. Whole number, minimum 0.	Whole number of points; 0 gives none.	number; default 3 (placeholder, not approved)
Answering an “ask for ideas” post (up to 5 a day) `pts_help`	Points a member earns for this action. The daily limits in the label are built into the code. Whole number, minimum 0.	Whole number of points; 0 gives none.	number; default 10 (placeholder, not approved)
First Plant ID (once) `pts_plantid_first`	Points a member earns for this action. The daily limits in the label are built into the code. Whole number, minimum 0.	Whole number of points; 0 gives none.	number; default 50 (placeholder, not approved)
Each Plant ID (up to 5 a day) `pts_plantid`	Points a member earns for this action. The daily limits in the label are built into the code. Whole number, minimum 0.	Whole number of points; 0 gives none.	number; default 5 (placeholder, not approved)
Sharing to social media (up to 3 a day) `pts_share`	Points a member earns for this action. The daily limits in the label are built into the code. Whole number, minimum 0.	Whole number of points; 0 gives none.	number; default 10 (placeholder, not approved)
Adding a profile photo and bio (once) `pts_profile`	Points a member earns for this action. The daily limits in the label are built into the code. Whole number, minimum 0.	Whole number of points; 0 gives none.	number; default 20 (placeholder, not approved)
First AI design (once) `pts_first_ai`	Points a member earns for this action. The daily limits in the label are built into the code. Whole number, minimum 0.	Whole number of points; 0 gives none.	number; default 20 (placeholder, not approved)
Each 4–5 star rating received `pts_rating`	Points a member earns for this action. The daily limits in the label are built into the code. Whole number, minimum 0.	Whole number of points; 0 gives none.	number; default 3 (placeholder, not approved)
Each new follower `pts_follow`	Points a member earns for this action. The daily limits in the label are built into the code. Whole number, minimum 0.	Whole number of points; 0 gives none.	number; default 1 (placeholder, not approved)
Points for 1 AI credit `redeem_credit_pts`	How many points a member trades for 1 AI credit.	Whole number of points.	number; default 100 (placeholder, not approved)
Points for extra storage `redeem_storage_pts`	How many points a member trades for one storage reward.	Whole number of points.	number; default 500 (placeholder, not approved)
...which gives this many MB `redeem_storage_mb`	How many MB one storage reward adds.	Whole number of megabytes.	number; default 250 (placeholder, not approved)

Steps

1. Go to the **Points** table under Community.
2. Enter points for each of the 14 actions.
3. Go to **Rewards** and set the three redeem values.
4. Press **Save Changes**.

Tips

- Enter 0 to stop awarding points for an action.
- Each AI image costs you real money, so set points for a credit with that in mind.

If something goes wrong

- Values reset: only whole numbers, minimum 0, are kept.

Settings → VisionScaper: Contractor tools and Twilio

Switch on the Contractor Hub, set approval, and add Twilio text-message details.

Open the WordPress dashboard and go to **Settings → VisionScaper**. Only users who can manage options (administrators) see this page. The **Contractors (CRM)** block turns on the Contractor Hub, Find a Local Contractor and My Projects. Review applications under **Settings → VisionScaper Contractors**. The **Text messages (Twilio)** area holds your Twilio details.

Before you start

- A Twilio account with a texting phone number (see get-twilio-details). US texting needs A2P 10DLC registration per the page.

Fields

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Turn on the Contractor Hub, Find a Local Contractor and My Projects `crm_on`	Master switch for the contractor tools.	Tick to use the Hub.	checkbox; default on (1)
Approve contractor applications automatically (not recommended) `crm_auto_approve`	New contractor applications start as approved instead of pending.	Leave unticked and approve by hand.	checkbox; default off (0)
Twilio Account SID `twilio_sid`	Identifies your Twilio account. Saved with only letters and numbers.	Paste the SID starting with AC. See get-twilio-details.	text; default (blank)
Twilio Auth Token `twilio_token`	The password for your Twilio account.	Paste the token. Leave dots to keep.	password (secret); default (blank)
Twilio phone number `twilio_from`	The number texts are sent from. Not needed if you use a Messaging Service.	Format +18605550100.	text; default (blank)
Messaging Service SID (optional) `twilio_msid`	If set, texts are sent through this Messaging Service instead of the number. Saved with only letters and numbers.	SID starting with MG.	text; default (blank)

Steps

1. Go to **Settings → VisionScaper → Contractors (CRM)**.
2. Tick **Turn on the Contractor Hub...**; leave auto-approve unticked.
3. In Twilio, set the incoming-message webhook to the address shown on the page (HTTP POST).
4. Paste Twilio Account SID, Auth Token and phone number; optionally the Messaging Service SID.
5. Press **Save Changes**. Secret boxes show 12 dots when a value is saved. Leave the dots alone to keep the saved value. Type a new value to replace it.

Tips

- Texting is treated as set up when SID, token and a number or Messaging Service are all saved.

If something goes wrong

- Texts not arriving: carriers block until registration is approved (page text).
- Hub missing: confirm the tick box is on.

Settings → VisionScaper: Phone app, voice, walk and autopay switches

Expo push token and three off-by-default switches for the phone app.

Open the WordPress dashboard and go to **Settings → VisionScaper**. Only users who can manage options (administrators) see this page. The **Mobile app (push notifications)** block has one optional token and three switches that are all off until you turn them on.

Before you start

- A fal.ai key for the two AI switches.
- Stripe keys for autopay.

Fields

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Expo access token (optional) `expo_access_token`	Sent with push messages to Expo; only needed if enhanced push security is on in your Expo project.	Paste token. See get-expo-access-token.	password (secret); default (blank)
Let the phone app summarise dictated notes with AI (uses your fal.ai key; each summary is one AI call, 200 a day per business, and a person accepts every suggestion). Off until you switch it on. `voice_ai`	Turns on AI summaries of dictated notes. Works only with a fal.ai key saved.	Tick to enable.	checkbox; default off (0)
Let the phone app turn a dictated property walk into a DRAFT quote with AI (uses your fal.ai key; … up to 30 a day, 3 tries per walk). … `walk_ai`	Turns on the walk-to-draft-quote feature. Works only with a fal.ai key saved.	Tick to enable.	checkbox; default off (0)
Let customers save a card or bank account with Stripe and let invoices marked “autopay” charge it on the due date. … `ar_autopay`	Turns on saved payment methods and autopay charging. Nothing is charged while off.	Tick only after reading the fees.	checkbox; default off (0)

Steps

1. Go to **Mobile app (push notifications)**.
2. Paste an Expo token only if your Expo project requires it.
3. Tick the switches you want.
4. Press **Save Changes**.

Tips

- Read the fees before turning autopay on.

If something goes wrong

- AI switch has no effect: a fal.ai key must be saved.

Settings → VisionScaper: Door-to-door map and aerial imagery

Choose map tiles for the door-to-door map and the imagery service outside Connecticut.

Open the WordPress dashboard and go to **Settings → VisionScaper**. Only users who can manage options (administrators) see this page. These blocks control the door-to-door street map and bird's-eye imagery outside Connecticut. Connecticut addresses always use the state's 3-inch imagery.

Before you start

- Optional tile provider account.

Fields

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Map tile address (optional) `map_tiles`	Tile address for the door-to-door map. Must be https and contain {z}, {x} and {y} or it is saved blank.	e.g. https://api.maptiler.com/maps/hybrid/{z}/{x}/{y}.jpg?key=YOUR_KEY	text (URL); default (blank, OpenStreetMap)
Map credit line `map_tiles_attr`	Credit text shown on the map as the provider requires.	e.g. © MapTiler © OpenStreetMap contributors	text; default (blank)
Deepest zoom level `map_tiles_max`	Highest zoom allowed when a tile address is set. Saved range 15–22; 19 is used with the default map.	19 or 20.	number; default 20
Image service address `aerial_service`	The ArcGIS image service for addresses outside Connecticut. Must be https and end in /ImageServer/exportImage or /MapServer/export or it is saved blank, which turns bird's-eye imagery off outside Connecticut.	Keep the default or paste another address.	text (URL); default https://imagery.nationalmap.gov/arcgis/rest/services/USGS
Imagery credit line `aerial_label`	Credit text shown with the image.	Text required by your provider.	text; default USGS NAIP imagery (public domain, about 2 f
Imagery resolution (feet per pixel) `aerial_res`	Tells contractors how precise traced edges are. Saved range 0.1–10.	e.g. 2.	number; default 2

Steps

1. Go to **Door-to-door map**.
2. Paste the tile address, credit line and deepest zoom.
3. Go to **Bird’s-eye imagery outside Connecticut**.
4. Keep or change the image service, credit and resolution.
5. Press **Save Changes**.

Tips

- Leave the image service empty to turn bird's-eye imagery off outside Connecticut.

If something goes wrong

- Address saved blank: it failed the format check.

Employee and crew member form, pay rate and permissions

The Team form (name, role, availability, internal cost per hour), the Settings crew row with private notes, and the role permission grid.

Two places: Contractor Hub → **Field work** → **Team** → **+ Add employee** (or tap a person), and Contractor Hub → **Settings** → **Crew, team & hours** (crew rows, private notes and the permission grid). Team is for people who may manage employees; Settings is for the owner.

Each person you add can be assigned jobs, appear in My work on their phone (when linked to their own VisionScaper account), and be costed on jobs. Switch people off instead of deleting them so history is kept. Your plan may cap how many field employees and crews you can have.

Before you start

- Employees link to their own free VisionScaper account by sign-in email; they sign up with that email first (or after).

Fields

Team form (Field work > Team)

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Name (`name`)	The person's name in schedules, assignments and time.	Full name.	
Contact (`contact`)	Where crew sheets and schedule texts go.	Email or mobile.	
Crew (`team`)	Group name; people in the same crew work together. Counts toward your plan's crew limit.	e.g. Crew A.	
Role (`role`)	Sets the permission set. Only the owner can make managers; managers get the rights set in Settings.	Pick one. Choices: Crew; Crew leader; Manager (owner only).	Crew
VisionScaper account (to use My work) (`login`)	Sign-in email of their own VisionScaper account; links them so they can open My work. Removing it ends their access.	Their email.	
Availability: day chips (`avail.days`)	Days they usually work; used to warn when assigning.	Tap days.	Mon-Fri
From (`avail.from`)	Usual start.		07:00
To (`avail.to`)	Usual end.		17:00
+ Add time off (`avail.off`)	Asks first day off (YYYY-MM-DD), last day off and a note.	e.g. 2026-07-01, 2026-07-08, Vacation.	
Internal cost per hour ($) (`cost_rate`)	Wage + taxes + insurance; used for job costing; never shown to the employee. Only shown if you can see finances. Blank = the company rate.	e.g. 28.50.	Blank (company rate)
Active (`active`)	Untick when someone leaves; they disappear from assignment but history stays and their access ends.		On
Add employee / Save / Remove from the list	Remove asks to confirm; someone with time or jobs on record is kept as a former employee.		

Settings > Crew, team & hours: crew rows

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Name (`name`)	Same as above.		
Email or mobile (for crew sheets) (`contact`)	Where crew sheets go.		
Crew (e.g. Crew A) (`team`)	Which crew.		
Role (`role`)	Crew, Crew leader or Manager.	Pick one. Choices: Crew; Crew leader; Manager.	Crew
Their VisionScaper account email (optional) (`login`)	Link to their account.		
+ Add crew member / Remove	Adds a blank row or deletes one.		
Save crew	Saves all rows with a name.		

Private notes (arrow under each crew row)

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Role (private) (`private.role`)	Your own job title note, e.g. Foreman. Only you see it.		
Started (`private.started`)	Start date.		
Pay rate (`private.pay`)	Your private note of their pay, free text. Costing uses the Team form's Internal cost per hour instead (no costing use of this note found in the screen code).	e.g. $24/hr.	
Reliability / Quality of work / Safety (`private.rating.*`)	Your private rating 1-5.	Pick one. Choices: 5 - Excellent; 4 - Good; 3 - OK; 2 - Needs work; 1 -	-

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
		Poor.	
Notes (`private.notes`)	Dated factual notes. Never shown to the employee or other contractors.	e.g. 3/14 trained on paver base.	

Team permissions grid (Manager / Leader / Crew)

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Use templates on jobs (checkbox for Manager / Leader / Crew) (`svc_use`)	Turns this right on or off for each role. The server enforces it. The owner can always do everything.	Tick the roles that should have it.	Manager 1, Leader 1, Crew 1 (code default; the server's current values show when you open the grid)
Create & edit company templates (checkbox for Manager / Leader / Crew) (`svc_edit`)	Turns this right on or off for each role. The server enforces it. The owner can always do everything.	Tick the roles that should have it.	Manager 1, Leader 0, Crew 0 (code default; the server's current values show when you open the grid)
Set default templates (checkbox for Manager / Leader / Crew) (`svc_default`)	Turns this right on or off for each role. The server enforces it. The owner can always do everything.	Tick the roles that should have it.	Manager 1, Leader 0, Crew 0 (code default; the server's current values show when you open the grid)
See costs, markups & margins (checkbox for Manager / Leader / Crew) (`svc_costs`)	Turns this right on or off for each role. The server enforces it. The owner can always do everything.	Tick the roles that should have it.	Manager 1, Leader 0, Crew 0 (code default; the server's current values show when you open the grid)
See every job (not only their own) (checkbox for Manager / Leader / Crew) (`jobs_all`)	Turns this right on or off for each role. The server enforces it. The owner can always do everything.	Tick the roles that should have it.	Manager 1, Leader 0, Crew 0 (code default; the server's current values show when you open the grid)
Assign people & reschedule (checkbox for Manager / Leader / Crew) (`jobs_assign`)	Turns this right on or off for each role. The server enforces it. The owner can always do everything.	Tick the roles that should have it.	Manager 1, Leader 0, Crew 0 (code default; the server's current values show when you open the grid)
Manage employees & availability (checkbox for Manager / Leader / Crew) (`team_manage`)	Turns this right on or off for each role. The server enforces it. The owner can always do everything.	Tick the roles that should have it.	Manager 1, Leader 0, Crew 0 (code default; the server's current values show when you open the grid)
Review & approve hours worked (checkbox for Manager / Leader / Crew) (`time_approve`)	Turns this right on or off for each role. The server enforces it. The owner can always do everything.	Tick the roles that should have it.	Manager 1, Leader 0, Crew 0 (code default; the server's current values show when you open the grid)
Create checklists & field forms (checkbox for Manager / Leader / Crew) (`forms_edit`)	Turns this right on or off for each role. The server enforces it. The owner can always do everything.	Tick the roles that should have it.	Manager 1, Leader 0, Crew 0 (code default; the server's current values show when you open the grid)
Approve jobs & override required items (checkbox for Manager / Leader / Crew) (`job_override`)	Turns this right on or off for each role. The server enforces it. The owner can always do everything.	Tick the roles that should have it.	Manager 1, Leader 0, Crew 0 (code default; the server's current values show when you open the grid)
See customer phone & email (checkbox for Manager / Leader / Crew) (`cust_contact`)	Turns this right on or off for each role. The server enforces it. The owner can always do everything.	Tick the roles that should have it.	Manager 1, Leader 1, Crew 1 (code default; the server's current values show when you open the grid)
Share job photos with customers (checkbox for Manager / Leader / Crew) (`files_share`)	Turns this right on or off for each role. The server enforces it. The owner can always do everything.	Tick the roles that should have it.	Manager 1, Leader 0, Crew 0 (code default; the server's current values show when you open the grid)
See labor rates, job costs, revenue & profit (checkbox for Manager / Leader / Crew) (`fin_view`)	Turns this right on or off for each role. The server enforces it. The owner can always do everything.	Tick the roles that should have it.	Manager 0, Leader 0, Crew 0 (code default; the server's current values show when you open the grid)
Clock their crew in & out on shared jobs (checkbox for Manager / Leader / Crew) (`crew_time`)	Turns this right on or off for each role. The server enforces it. The owner can always do everything.	Tick the roles that should have it.	Manager 1, Leader 1, Crew 0 (code default; the server's current values show when you open the grid)
Phone app: see every customer (checkbox for Manager / Leader / Crew) (`cust_view`)	Turns this right on or off for each role. The server enforces it. The owner can always do everything.	Tick the roles that should have it.	Manager 1, Leader 0, Crew 0 (code default; the server's current values show when you open the grid)
Phone app: edit customers & properties (checkbox for Manager / Leader / Crew) (`cust_edit`)	Turns this right on or off for each role. The server enforces it. The owner can always do everything.	Tick the roles that should have it.	Manager 1, Leader 0, Crew 0 (code default; the server's current values show when you open the grid)
Phone app: add potential customers (checkbox for Manager / Leader / Crew) (`cust_lead`)	Turns this right on or off for each role. The server enforces it. The owner can always do everything.	Tick the roles that should have it.	Manager 1, Leader 1, Crew 1 (code default; the server's current values show when you open the grid)
Phone app: see private customer notes (checkbox for Manager / Leader / Crew) (`cust_notes`)	Turns this right on or off for each role. The server enforces it. The owner can always do everything.	Tick the roles that should have it.	Manager 1, Leader 0, Crew 0 (code default; the server's current values show when you open the grid)
Phone app: Door-to-door (checkbox for Manager / Leader / Crew) (`canvass`)	Turns this right on or off for each role. The server enforces it. The owner can always do everything.	Tick the roles that should have it.	Manager 1, Leader 1, Crew 0 (code default; the server's current values show when you open the grid)
Phone app: measure properties (checkbox for Manager / Leader / Crew) (`measure`)	Turns this right on or off for each role. The server enforces it. The owner can always do everything.	Tick the roles that should have it.	Manager 1, Leader 1, Crew 0 (code default; the server's current values show when you open the grid)
Phone app: view & share landscape plans (checkbox for Manager / Leader / Crew) (`plans_view`)	Turns this right on or off for each role. The server enforces it. The owner can always do everything.	Tick the roles that should have it.	Manager 1, Leader 1, Crew 0 (code default; the server's current values show when you open the grid)

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Phone app: route planner (checkbox for Manager / Leader / Crew) (`planner`)	Turns this right on or off for each role. The server enforces it. The owner can always do everything.	Tick the roles that should have it.	Manager 1, Leader 1, Crew 0 (code default; the server's current values show when you open the grid)
Phone app: see quotes, invoices & payments (amounts) (checkbox for Manager / Leader / Crew) (`money_view`)	Turns this right on or off for each role. The server enforces it. The owner can always do everything.	Tick the roles that should have it.	Manager 1, Leader 0, Crew 0 (code default; the server's current values show when you open the grid)
Phone app: start quote drafts & invoices (checkbox for Manager / Leader / Crew) (`docs_draft`)	Turns this right on or off for each role. The server enforces it. The owner can always do everything.	Tick the roles that should have it.	Manager 1, Leader 0, Crew 0 (code default; the server's current values show when you open the grid)
Phone app: send quotes & invoices (checkbox for Manager / Leader / Crew) (`docs_send`)	Turns this right on or off for each role. The server enforces it. The owner can always do everything.	Tick the roles that should have it.	Manager 1, Leader 0, Crew 0 (code default; the server's current values show when you open the grid)
Phone app: record payments received (checkbox for Manager / Leader / Crew) (`pay_record`)	Turns this right on or off for each role. The server enforces it. The owner can always do everything.	Tick the roles that should have it.	Manager 1, Leader 0, Crew 0 (code default; the server's current values show when you open the grid)
Phone app: add expenses (need approval) (checkbox for Manager / Leader / Crew) (`exp_add`)	Turns this right on or off for each role. The server enforces it. The owner can always do everything.	Tick the roles that should have it.	Manager 1, Leader 1, Crew 1 (code default; the server's current values show when you open the grid)
Phone app: approve or reject expenses (checkbox for Manager / Leader / Crew) (`exp_approve`)	Turns this right on or off for each role. The server enforces it. The owner can always do everything.	Tick the roles that should have it.	Manager 1, Leader 0, Crew 0 (code default; the server's current values show when you open the grid)
Phone app: see & assign everyone's tasks (checkbox for Manager / Leader / Crew) (`tasks_all`)	Turns this right on or off for each role. The server enforces it. The owner can always do everything.	Tick the roles that should have it.	Not listed in the screen's built-in default; the grid shows the server's current value
Phone app: approve messages, follow-ups & review requests (checkbox for Manager / Leader / Crew) (`mkt_approve`)	Turns this right on or off for each role. The server enforces it. The owner can always do everything.	Tick the roles that should have it.	Not listed in the screen's built-in default; the grid shows the server's current value
Export approved hours for payroll (checkbox for Manager / Leader / Crew) (`payroll_export`)	Turns this right on or off for each role. The server enforces it. The owner can always do everything.	Tick the roles that should have it.	Not listed in the screen's built-in default; the grid shows the server's current value
Turn automatic payment on or off (checkbox for Manager / Leader / Crew) (`autopay_manage`)	Turns this right on or off for each role. The server enforces it. The owner can always do everything.	Tick the roles that should have it.	Not listed in the screen's built-in default; the grid shows the server's current value
See live team location (checkbox for Manager / Leader / Crew) (`loc_live`)	Turns this right on or off for each role. The server enforces it. The owner can always do everything.	Tick the roles that should have it.	Not listed in the screen's built-in default; the grid shows the server's current value
See location history & mileage (checkbox for Manager / Leader / Crew) (`loc_history`)	Turns this right on or off for each role. The server enforces it. The owner can always do everything.	Tick the roles that should have it.	Not listed in the screen's built-in default; the grid shows the server's current value
Create & approve purchase orders (checkbox for Manager / Leader / Crew) (`po_manage`)	Turns this right on or off for each role. The server enforces it. The owner can always do everything.	Tick the roles that should have it.	Not listed in the screen's built-in default; the grid shows the server's current value
Receive deliveries on purchase orders (no prices) (checkbox for Manager / Leader / Crew) (`po_receive`)	Turns this right on or off for each role. The server enforces it. The owner can always do everything.	Tick the roles that should have it.	Not listed in the screen's built-in default; the grid shows the server's current value
Run the first-run guide & sample data (checkbox for Manager / Leader / Crew) (`setup_manage`)	Turns this right on or off for each role. The server enforces it. The owner can always do everything.	Tick the roles that should have it.	Not listed in the screen's built-in default; the grid shows the server's current value
Crew app: messages with the office (checkbox for Manager / Leader / Crew) (`crew_msg`)	Turns this right on or off for each role. The server enforces it. The owner can always do everything.	Tick the roles that should have it.	Not listed in the screen's built-in default; the grid shows the server's current value
Save permissions	Saves the grid.		

Steps

1. Open Field work → Team and press **+ Add employee**.
2. Type **Name** and **Contact**, set **Crew** and **Role**.
3. Enter their **VisionScaper account** email so My work opens for them.
4. Pick their **Availability** days and times; add **time off** with the prompts.
5. If you can see money, type the **Internal cost per hour**.
6. Leave **Active** ticked and press **Add employee**.
7. As owner, open Settings → Crew, team & hours to add private notes and press **Save crew**.
8. Adjust the **Team permissions** ticks and press **Save permissions**.

Tips

- Pay rate in this app is two different things: the private Pay rate note is for you; Internal cost per hour is what job costing uses.

If something goes wrong

- A plan limit message ("N of M field employees") means you must upgrade or remove someone.
- If someone cannot open My work, check the sign-in email matches their account exactly.
- Permissions are checked by the server, so a ticked box that the server disagrees with simply has no effect.

Vendor and purchase order forms

Add a vendor, create a purchase order, send it, receive deliveries and attach a vendor bill.

Contractor Hub → **Field work** → **Purchases** (named "Materials & purchases"). You need the purchase-order rights (create/approve or receive-only). Receive-only roles do not see prices.

Vendors are the suppliers you order from; purchase orders go to the email saved on the vendor. A PO can copy the material list of a signed job. Deliveries and bills post to the job's actual cost.

Before you start

- A signed job (optional) to copy its materials from.

Fields

New vendor / Edit vendor

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Name (`name`)	Vendor name in lists and purchase orders.	e.g. Acme Landscape Supply.	
Contact person (`contact`)	Who you talk to.		
Email (orders go here) (`email`)	Purchase orders are emailed to this address.		
Phone (`phone`)			
Terms (`terms`)	Payment terms; used to work out a bill's due date.	e.g. Net 30.	
Our account number with them (`account_no`)	Your account number.		
Notes (`notes`)			
Save / Archive	Archive hides a vendor (asks, with undo); its purchase orders stay.		

New purchase order

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Vendor (`vendor_id`)	Which vendor to order from. Add a vendor first.	Pick one.	First vendor
For job (its material list is used) (`quote_id`)	Pick a signed, unfinished job to copy its material lines, or "No job (by hand)".	Pick one.	No job (by hand)
Item (manual lines) (`lines[].name`)	Line item name when no job is picked.		
Qty (`lines[].qty`)	Quantity.		
Unit (`lines[].unit`)	Unit.		
Unit cost (`lines[].unit_cost`)	Unit price.		
+ line / Create draft	Adds a manual line / creates a draft PO.		

Purchase orders list and PO page

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Status (list filter) (`status`)	Shows open orders or a chosen status.	Pick one. Choices: Open; Draft; Sent; Partly received; Received; Billed; Closed; Voided.	Open
Send to vendor	Marks sent and emails the vendor if the vendor has an email.		
Receive a delivery: quantity, "Why extra?", "Why short?" per line (`items[]`)	Enter what arrived. Over-receiving needs a reason; a short line needs a reason when you mark complete.	Quantity per line.	
That is everything (short lines need a reason) (`complete`)	Tells VisionScaper no more is coming.		
Save delivery	Records the delivery.		
Vendor bill on the PO: Vendor invoice # / Amount / Add bill (`number`, `amount`)	Records a bill; after that the job cost uses the bill instead of received quantities (never both). Available once the PO is sent.		
Close / Void purchase order	Close ends the PO; Void asks why.		

Steps

1. Open Purchases and press **+ New vendor**; fill the boxes and **Save**.
2. Press **+ New purchase order**, choose the **Vendor**.
3. Choose a **job** to copy its materials, or type lines by hand. Press **Create draft**.
4. Open the PO and press **Send to vendor**.
5. When the delivery arrives press **Receive a delivery**, enter quantities, give reasons for extras or shorts, and **Save delivery**.
6. When the vendor invoice arrives, add it under **Vendor bills**.

If something goes wrong

- "Add a vendor first." appears when you have none.
- If the vendor has no email, "Marked sent" appears and nothing is emailed; send it yourself.
- Conflicts ("changed since you opened") mean someone else edited; reopen the PO.

Supplier bill form

Enter a supplier bill, approve it and record payments against it.

Contractor Hub → **Money** → **Supplier bills** (address #/money/bills). Needs a plan with vendor bills.

Enter what a supplier billed you, approve it, then record each payment. Approved bills count as job costs; a bill tied to a purchase order replaces the order's received value. VisionScaper records payments you already made; it does not send money to your supplier.

Before you start

- Someone different from the person who entered a bill may be required to approve it (your setting).

Fields

Search and list

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Search (`q`)	Filters the list by supplier, bill number or note.	Type part of the name or number.	
Filter buttons (`filter`)	To pay, Past due, Due soon, Drafts, Paid, All.	Pick one.	To pay

Enter a supplier bill

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Supplier (`vendor_id / vendor_name`)	Who billed you. "+ A new supplier..." shows a name box. The due date comes from their payment terms if left blank.	Pick or name the supplier.	
Bill number (`number`)	As printed on the bill.	e.g. INV-8841.	
Bill date (`bill_date`)	Date on the bill.		Today
Due date (`due_date`)	When it is due; blank = from supplier terms.		
Purchase order (`po_id`)	Link to an order so it is not counted twice in job cost.	Pick one.	Not from an order
Job (`quote_id`)	Which job it belongs to.	Pick one.	No job
Line description (`lines[].description`)	What it was for.		
Line quantity (`lines[].qty`)	With a price each.		
Line price each (`lines[].unit_cost`)			
Line amount (if no quantity) (`lines[].amount`)	Use instead of qty and price.		
Add a line / Remove			
Tax on the bill (`tax`)	Added to the line total.	Dollars.	0
Note (`memo`)		Up to 200 characters.	
Save as draft / Save and approve / Cancel	Draft keeps it unapproved; approve counts it as a job cost.		

Open bill

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Approve / Change / Void bill	Change only for drafts; void asks why.		
Record a payment: Amount (`amount`)	Payment amount (balance by default).		
Record a payment: How (`method`)	How you paid.	Pick one. Choices: Check; Bank transfer; Card; Cash; Other.	Check
Record a payment: Date (`paid_on`)			Today
Record a payment: Reference (`ref`)	Check number or confirmation.		
Record payment / Void payment	Saves; voiding asks why.		

Steps

1. Press **Enter a supplier bill**.
2. Choose the **Supplier**, type the **Bill number** and dates.
3. Link a **Purchase order** and **Job** if there is one.
4. Add lines (quantity and price each, or just an amount); add **Tax on the bill**.
5. Press **Save and approve** (or **Save as draft**).

6. When you pay, open the bill and use **Record a payment**.

If something goes wrong

- "A different person has to approve a bill someone else entered" is a setting; ask the other approver.
- Void asks for a reason; type at least a few words.
- Payment boxes only appear on approved or part-paid bills.

Inventory forms: item, count, move, set aside, place, import

Every box in the stock item, count/change, move, set-aside, place and CSV import dialogs.

Contractor Hub → **Inventory** (address #/field/inventory, in the work group after Field work). Needs a plan with inventory and the purchase-order rights; other people may only look.

Inventory tracks what is in the truck and shop, what is low and what is set aside for a job. Nothing is erased: every count or change adds a line to the history.

Before you start

- Add at least one **place** (shop, truck) before counting anything.

Fields

Add a stock item / Edit

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Name (`name`)	Item name (at least 2 characters).	e.g. Brown mulch.	
Code (optional) (`sku`)	Your SKU/code, up to 60 characters.		
Unit (`unit`)	Unit of measure.	yd, bag, ft, each.	
What it costs you per unit ($) (`cost`)	Used for stock value and reorders only.	Dollars.	
Supplier (`vendor_id`)	Vendor for reordering.	Pick or None yet.	None yet
Reorder when available is at or below (`reorder_point`)	Low-stock warning level; 0 = never warn.	e.g. 5.	0
Order this many (`reorder_qty`)	Suggested order size.	e.g. 20.	0
Usually kept at (`loc_id`)	Default place.	Pick one.	First place on the list
How many do you have now? (`startQty`)	New items only; recorded as a count in history.	e.g. 12.	
Stop using this item (it keeps its history) (`archived`)	Edit only; archives the item.		Off
Add item / Save			

Count or change

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Where (`location_id`)	Which place the count applies to.	Pick one. Choices: Your places.	Where most stock is
How (`mode`)	Count = the true total now; add/remove = a change.	Pick one. Choices: I counted - this is how many there are; Add or remove this many (use - to remove).	I counted
Amount (`counted / qty`)	The number.		
Why (`reason`)	Reason kept in the history.	Pick one. Choices: Recounted; Damaged or spoiled; Lost or stolen; Found more; Returned to the supplier; Used, not on a job; Other (say why).	Recounted
Note (needed for "Other") (`note`)	Up to 300 characters.		
Save	Adds a history line. Refused if it would go below zero while that setting is off.		

Move

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
From (`from`)	Source place.		
To (`to`)	Destination place (must differ). Needs two places.		
How many (`qty`)	Amount to move.		
Move			

Set aside

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
For (`visit_id / quote_id`)	A visit or quote to hold stock for.	Pick one.	
How many (`qty`)	Amount reserved (still in the truck, no longer counted as free).		

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Note (`note`)			
Set aside			

Places tab

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Name (`name`)	Place name.	e.g. Shop or Truck 1.	
Kind (`kind`)	Type of place.	Pick one. Choices: Shop or yard; Truck or trailer; Other.	Shop or yard
Let stock go below zero (`allow_negative`)	Owner only. When off, a count or change that would go below zero is refused.	Turn on only if you record deliveries after use.	Off
Edit / Stop using	Rename or retire a place.		

Import or export

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Download my stock list	Downloads a CSV of current stock.		
File (`csv file`)	Choose a CSV (600 KB at most).		
File contents (`csv`)	Or paste rows. First line = column names: name, sku, unit, cost, supplier, reorder_point, reorder_qty, location, qty.		
Check the file	Dry run: new, update and error counts. Any error stops the import.		
Import	Enabled after a clean check; importing the same file twice changes nothing.		

Steps

1. Open **Inventory → Places** and press **Add a place**.
2. Press **Add an item**, fill **Name**, **Unit**, cost, supplier, reorder levels and **How many do you have now?**
3. On an item press **Count / change**, choose **Where**, **How**, **Amount** and **Why**.
4. Use **Move** between places and **Set aside** for jobs.
5. To load many items, open Import or export, choose a CSV, **Check the file**, then **Import**.

If something goes wrong

- "Give the item a name." Names need 2+ characters.
- "Add a place first" means no places exist.
- "You need two places to move stock between."
- A shortfall list shows jobs that needed more than you had; press **Try again** after recounting.

Task form, quick expense and clock-in forms

The Add a task dialog, the + menu's New task, New expense and Clock in pop-ups, and the expense approval boxes.

Tasks: Contractor Hub → **Tasks** → **Add**. Quick forms: the **+** button anywhere in the Hub → New task, New expense, Clock in. Approvals: Field work → **Expenses**.

Tasks are one list for you and your team. Quick expenses let anyone record a cost; managers approve or reject them. Clock in starts a timer on an activity.

Fields

Add a task / Edit task

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
What needs doing (`title`)	Task title, at least 2 characters.		
Due date (`due`)	Optional date. Defaults to today when you add from the Due today list.		
Time (optional) (`due_time`)	Needs a date.		
Who is it for (`assignee`)	Only shown if you can assign tasks to others.	Pick one. Choices: Me and your people.	Me
Priority (`priority`)	High tasks stand out.	Pick one. Choices: Normal; High.	Normal
Find a customer / Customer (`client_id`)	Links the task to a customer; type 2 letters to search.		
Job (`visit_id`)	Link to an upcoming visit.		No job
Notes (`body`)	Up to 1000 characters.		
Add task / Save			

Quick New task (+ menu)

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Task (`title`)			
Due (optional) (`due`)			
Notes (`body`)			
Save task			

New expense (+ menu)

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Amount ($) (`amount`)	Must be above 0.	e.g. 42.18.	
Category (`category`)	Type of expense.	Pick one. Choices: Materials; Fuel; Equipment & repairs; Dump / disposal; Subcontractor; Supplies; Meals; Other.	Materials
Vendor (`vendor`)	Who you paid.		
Note (`note`)	What it was for.		
Save expense	Records the expense. The permission is labelled "add expenses (need approval)", and managers approve or reject in Field work → Expenses.		

Clock in (+ menu)

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
What are you doing? (`activity`)	Starts a timer on this activity. Job work and Break are left out; clock into a job from the job itself.	Pick one. Choices: Travel; Loading / prep; Shop / yard; Other (your Field work activity list).	First activity
Clock in	Starts the timer. Clock out from Field work → Time.		

Expenses waiting for your OK (Field work > Expenses)

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Approve	Approves; the person who entered it is told.		
Reject (asks "Why is it rejected?") (`note`)	Reason of at least 3 characters shown to the person.		

Steps

1. Press **Add** in Tasks, type **What needs doing**, optional date, time, priority, customer and job, then **Add task**.
2. For a cost, press **+ → New expense**, type **Amount**, choose **Category**, add **Vendor** and **Note**, press **Save expense**.
3. To start a timer press **+ → Clock in**, pick the activity and press **Clock in**.
4. Managers open Field work → Expenses and press **Approve** or **Reject**.

If something goes wrong

- "Give the task a short title." Use 2+ characters.
- "Type the amount." Enter a number above 0.
- "Pick a due date to go with the time."
- "Someone changed this task. Close this and open it again." means another edit happened.

Service template form

Every section of the New service template / Edit template pop-up: pricing, labor, materials, scheduling, customer messages, crew instructions and automations.

Contractor Hub → **Services** → new template or open one. Needs the right to create and edit company templates; cost boxes need the right to see costs.

A template saves how you do and price a service so quotes, visits and invoices can reuse it. Only the name is needed; every section below is optional. Saving an existing template creates a new version; quotes, proposals, invoices and jobs already made keep the version they used.

Before you start

- Cost, markup and supplier boxes only show if you can see costs.

Fields

Top (always visible)

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Service name * (`name`)	Template name, required.	e.g. Weekly lawn mowing.	
Category (`category`)	Groups the template.	Suggestions: Lawn care, Cleanups, Beds & mulch, Planting, Pruning, Lawn renovation, Hardscape & grading, Design.	
Pricing method (`method`)	How the price is worked out.	Pick one. Choices: Flat rate; Hourly; Per unit; Tiered by size; Time & materials.	Flat rate
Default price ($) / Price per labor hour ($) / Price per unit ($) / Price (`price`)	Label changes with the method. Blank = priced on each job. Hidden for Tiered.	Dollars.	Blank
Unit (`unit`)	For Per unit and Tiered.	sq ft, linear ft, cu yd, each, visit, hour, acre, ton.	
Estimated duration (hours) (`duration`)	Visit length; steps of 0.25.		1
Crew size (`crew`)	People needed.		1
Size tiers: Up to / Price (`tiers[]`)	Tiered only: price for each size band. + Add a size tier adds one.	e.g. up to 5000 sq ft = 60.	

Description, scope & what's included

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Description (`description`)	Short description.		
Scope of work (`scope`)	One task per line.		
Included tasks (`included`)	One per line.		
Excluded tasks (`excluded`)	One per line; shown as "Not included".		

Pricing & billing

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Minimum charge ($) (`min`)	Lowest price for one job.	Dollars.	
Billing frequency (`billing`)	One-time, per visit, weekly, every 2 weeks, monthly or seasonal contract. Sets repeats on invoices and visits.	Pick one. Choices: One-time; Per visit; Weekly; Every 2 weeks; Monthly; Seasonal contract.	One-time
Typical job quantity (`qty`)	Used for the estimate preview.		1
Markup % (when no default price) (`markup.pct`)	Suggests cost + markup. Needs cost rights.	Percent.	Use my price book
Target profit margin % (`target_margin`)	Warns when below target.	e.g. 40.	
Alert managers when cost passes this % of budget (`alert_cost_pct`)	Starting alert level for jobs from this template.	e.g. 90.	

Labor

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Labor cost per hour ($) (`labor.rate`)	Needs cost rights.		My rate

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Estimated labor hours (total) (`labor.hours`)	Total hours.		Duration x crew
Labor hours per unit (`labor.per_unit`)	Per-unit/tiered: hours = this x quantity.	e.g. 0.01.	

Materials, equipment & suppliers

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Materials: Material / Quantity / unit / basis / per / $/unit / Supplier (`materials[]`)	Each row is a material; basis "per job" or "per ... job units". + Add material adds a row.	e.g. Mulch, 3, cu yd.	
Equipment (`equipment`)	Pick from your Equipment list or + Other.		
Supplier preferences (`suppliers`)	Free text. Needs cost rights.	e.g. Mulch: Acme, then Green Yard.	

Scheduling & season

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Preferred days (`schedule.days`)	Days of week.		
Window from / to (`schedule.from, to`)	Preferred time window.		
Book at least (days ahead) (`schedule.lead_days`)	Minimum lead time.		0
Weather-dependent (don't schedule in rain) (`schedule.weather`)	Marks rain-sensitive work.		Off
Months offered (none = all year) (`seasons`)	Months the service is offered; visits outside are warned/skipped.	Tap months.	All year

Customer messages

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Booking confirmation / Reminder before the visit / When the job is done: tick (`comms.*.on`)	Uses your own wording for that message.		Off
Email subject (`comms.*.subject`)	Subject for that message.	e.g. {customer_first_name}, your mowing is booked.	
Email (`comms.*.email`)	Email body.	Tags such as {customer_first_name}, {appointment_date}, {appointment_time}, {property_address}, {company_name}.	
Text message (`comms.*.sms`)	Text body.		

Crew instructions & completion checklist

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Employee instructions (`instructions`)	Printed on the crew sheet; never prices.		
Completion checklist (`checklist`)	One item per line; crew tick them on their phone.		

Automations (when a visit is marked Done)

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Create a draft invoice (`auto.invoice`)	For one-time and per-visit billing.		Off
Ask the customer for a review (`auto.review`)			Off
Book the next visit (`auto.next_visit`)	Weekly, every 2 weeks and monthly; stays in season.		Off
Book a follow-up visit after (days) (`auto.followup_days`)	0 = none.		0

Bottom

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Default template for this category (`is_default`)	Preselected when you add a service in this category. Needs the default right.		Off
Change note (`note`)	Shown in version history. Existing templates only.	What changed?	
Save template / Save as new version			

Steps

1. Open Services and press the new-template button.
2. Type **Service name**, **Category**, choose **Pricing method**, price and unit.
3. Set **Estimated duration** and **Crew size**.
4. Open each arrow section you need and fill it in.
5. Press **Save template**.
6. To change one later, edit and press **Save as new version**; add a **Change note**.

If something goes wrong

- "Give the service a name." The name needs 2+ characters.
- "Your role can't create or change company templates. Ask the owner."
- Prices of 0 or blank mean the job is priced when you add it.

Equipment item and maintenance forms

Add equipment, set its meter and maintenance tasks, log a service, update readings and set reminders.

Contractor Hub → **Equipment** → **Add equipment**, or **Edit** on a machine. Reminder settings are in the **Reminder settings** arrow at the bottom of the page.

Pick the type and the usual maintenance is filled in for you (oil, blades, grease, filters, belts, tires, registration and so on), each "every N hours/miles and/or every N days". Whichever comes first makes a task due. Everything is editable.

Before you start

- Text reminders need text messaging set up; otherwise only Email is selectable.

Fields

Add equipment / Edit

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Type (`type`)	Chooses the machine type and fills in its usual maintenance, meter kind and name. Required.	Pick one. When editing, you are asked before the maintenance list is replaced. Choices: Zero-turn mower (commercial); Walk-behind mower; String trimmer; Backpack / handheld blower; Hedge trimmer; Chainsaw; Edger; Core aerator; Dethatcher / power rake; Sod cutter; Skid steer / compact track loader; Mini excavator; Stump grinder; Snow blower; Generator; Truck / van; Trailer; Dump trailer; Snow plow; Sprayer / spreader; Other.	
Name (`name`)	Your name for it.	e.g. Mower #2, White F-250.	Type name
Make (`data.make`)		e.g. Scag.	
Model (`data.model`)		e.g. Turf Tiger II.	
Year (`data.year`)			
Serial / VIN (`data.serial`)			
Plate (`data.plate`)			
Bought (`data.purchased`)			
Meter (`meter_unit`)	What the reading counts.	Pick one. Choices: Engine hours; Miles; No meter (by date only).	Engine hours
Current reading (`meter`)	Hours or miles right now.		
Your own fields: Field / Value (`data.fields[]`)	Custom facts such as Fleet #, Warranty ends. + Add your own field adds a row.		
Notes (`data.notes`)			
Maintenance task: on tick, Task name (`tasks[].on, name`)	Untick to switch a task off.		
Every (hours or miles) and/or days (`tasks[].meter, days`)	Whichever comes first makes it due. The meter box is hidden for "No meter".	e.g. 100 hours or 365 days.	From the type
last done (date) and at hours/miles (`tasks[].last_date, last_meter`)	Set if you know it so the first reminder is right.		
+ Add a task / Remove task			
Add equipment / Save / Delete	Delete has an Undo bar.		

On each machine card

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
New reading (`value`)	Updates the hour meter or odometer in one tap. A lower reading than before asks you to confirm.		
Update			
Done (task) / Log a service (several tasks)	Opens the service-done dialog.		

Service done dialog

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
What was done (`tasks`)	Tick every task you did.		
Date (`date`)			Today
Odometer / Hour meter (`meter`)	Reading when done.		Current reading
Cost ($) (`cost`)	Cost of the service.		0.00
Done by (`by`)	Optional.		
Notes (`note`)	Parts, oil used.		
Save	Logs it and schedules the next one.		

Reminder settings

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Remind me about maintenance (`remind`)	Turns reminders on (one message a day at most, in working hours).		On
Send by (`channel`)	Email, Text or Both.	Pick one. Choices: Email; Text; Both.	Email
Warn me when this close (%) (`soon`)	How close to due counts as "soon", e.g. 10% = a 100-hour oil change shows soon at 90 hours.		10
Ask for new readings after (days) (`meter_nudge`)	Checked on Mondays; 0 = never ask.		14
Save reminder settings			

Steps

1. Press **Add equipment**.
2. Choose the **Type**; check the **Name**.
3. Enter make, model, year, serial, plate and **Bought** if you want.
4. Choose the **Meter** and enter the **Current reading**.
5. Review the **Maintenance** tasks; set **last done** where you know it.
6. Press **Add equipment**.
7. Later update readings on the card and press **Done** after a service.
8. Open **Reminder settings** and press **Save reminder settings**.

If something goes wrong

- "Choose the type of equipment." The Type is required.
- "Type the reading." The New reading box was empty.
- Reminder emails depend on your email setup; texts need text messaging.

Checklist (field form) editor

Every box when you create or edit a checklist the crew completes on a visit.

Contractor Hub → **Field work** → **Checklists** → **+ New checklist** (or tap one). You need the right to create checklists.

A checklist is a list of tasks, questions, measurements and required photos your crew completes on their phone. Required items must be done before a job can finish (managers can override with a reason). Each job keeps the version it started with.

Fields

Checklist

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Name (`name`)	Checklist name.	e.g. Mowing closeout.	
Item: What to do / ask (`label`)	Item wording. Items with no text are dropped on save.		
Item: Type (`type`)	Kind of answer.	Pick one. Choices: Task (tick when done); Yes / No question; Measurement / number; Short answer; Pick one; Photo; Signature.	Task (tick when done)
Required (`required`)	Must be done before the job can be finished.		Off
Photo (`photo`)	Not shown for the Photo type.	Pick one. Choices: No photo; Photo optional; Photo required.	No photo
Note (`note`)	Whether the crew can/must add a note.	Pick one. Choices: No note; Note optional; Note required.	Note optional
Unit (ft, bags...) (`unit`)	Only for Measurement type.		
Choices, separated by commas (`options`)	Only for Pick one.	Good, Fair, Poor	
Always show / Only if "..." is (`show_if`)	Hide an item unless an earlier yes/no or pick-one answer matches.		
Move up / Remove / + Add item			
Use it on: Every job (`applies.all`)	Attach to all jobs.		Off
These kinds of visits (`applies.kinds`)	Attach to visit kinds.	Tap kinds.	Job day
These services (`applies.services`)	Attach to service templates.		
Save checklist / Archive / Restore	Saving makes a new version for jobs not yet started.		

Steps

1. Press **+ New checklist** and type the **Name**.
2. Press **+ Add item**; type the wording, choose the **Type**, tick **Required**.
3. Set **Photo** and **Note** rules; for Pick one add **Choices**.
4. Use the **Always show** dropdown to make an item depend on an earlier answer.
5. Choose where it is used: **Every job**, visit kinds or services.
6. Press **Save checklist**.

If something goes wrong

- Items without wording disappear on save.
- A started job keeps the old version; new jobs get the new one.
- If you cannot edit, you do not have the checklist right.

Marketing campaign, audience and automation forms

Every box in the campaign editor (channel, audience, message blocks, design, schedule, A/B test) and in the automation steps and wording editor.

Contractor Hub → **Marketing** → **Campaigns** (new campaign) and **Automations**. Campaign sending needs your messaging set up (email and, for texts, Twilio: get-twilio-details) and a plan that includes marketing.

A campaign sends one message to customers who match your audience filters. A live count shows who will get it and why others are left out. Your frequency limit, sending hours and opt-outs still apply. Automations run steps for a trigger such as a new lead.

Before you start

- Start from a template when making a new campaign: Seasonal service (asks "which service?"), Seasonal newsletter, Last few openings, Win-back offer, Referral program, Maintenance plan, Thank-you / holiday note, or Start from scratch.

Fields

Campaign editor

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Campaign name (`name`)	Your label.		
Send by (`channel`)	How to send. Smart sends text if allowed, else email.	Pick one. Choices: Email; Text; Text if allowed, else email; Both.	From template
Customer stage (`stage`)	Which stages are included; none picked = everyone.	Tap stages. Choices: Potential customers; Prospects; Customers; Past customers; Lost.	From template
Had any of these services (`services_had`)	Only people who had one.		
Never had these services (`services_not`)	Excludes people who had them.		
No work in the last ... days (`last_job_days_min`)	People whose last job was at least this many days ago.	e.g. 300.	
Worked with you in the last ... days (`last_job_days_max`)	People whose last job was within this many days.		
Spent at least (`min_spent`)	Minimum lifetime spend.	Dollars.	
Skip anyone messaged in the last ... days (`not_contacted_days`)	Avoids over-messaging.	e.g. 14.	
Towns (`towns`)	Only these towns.	e.g. Avon, Simsbury.	
Has any tag (`tags_any`)			
Has none of these tags (`tags_none`)			
Open estimate (`has_open_quote`)		Pick one. Choices: Doesn't matter; Has an open estimate; No open estimate.	Doesn't matter
Rating (`rated_min`)	Customers who rated you.	Pick one. Choices: Any; 4 stars or better; 5 stars only.	Any
Audience count (read-only)	Shows "N will get it of M matching, K reachable by email, J by text" and who is not included and why.		

Message

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
AI writer: What's it for? (`purpose`)	Goal for the AI to write from.	e.g. fill our fall cleanup schedule.	
Tone (`tone`)		Pick one. Choices: Friendly; Professional; Excited; Short & direct.	Friendly
Write it for me	Gives 3 versions to pick from; you can still edit.		
Offer (optional) (`offer`)	Shows wherever {offer} / {offer_line} appear. AI never invents offers.	e.g. $25 off when you book by Oct 31.	
Subject (`subject`)	Email subject line.		
Preview text (`preheader`)	Shown after the subject in the inbox.		
Text message (`sms`)	Keep it short; a bubble preview shows segments and characters.		
Email blocks: Heading (`text`)	Heading block.		
Email blocks: Text (`text`)	Supports **bold**, *italic*, link text and the tag button.		

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Email blocks: Button text and Link (`text, url`)	Link may be a https address or {booking_link}.		Book now / {booking_link}
Email blocks: Image - Picture, Picture link, Describe it, Opens (`url, alt, link`)	Picture under 6 MB or a link.		
Email blocks: Offer box - Headline, Details, Small print / deadline (`title, text, expires`)			
Email blocks: Review quote - What they said, Who, Stars (`text, name, stars`)	Stars 5 or 4.		
Email blocks: Divider / Spacer	Layout only.		
Move up / Move down / Remove (block)			

Design for this campaign (arrow)

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Layout (`layout`)		Pick one. Choices: Options from your Marketing settings.	Your Settings default
Font (`font`)		Pick one. Choices: Options from your Marketing settings.	Your Settings default
Button & accent color (`brand`)			
Banner photo (`hero`)	Link to a banner picture, optional.	https://...	

When

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
When (`mode`)	Right away, at a time, each person's best time, or spread over days.	Pick one. Choices: Right away; At a time; Each person's best time; Spread over days.	Right away
At a time (date and time) (`at`)	Only for "At a time".		
Spread over days (1-14) (`days`)	Only for "Spread over days".		3
Test two versions (`ab.on`)	Turns on A/B testing.		Off
Version B - email subject / text (`ab.subject_b, sms_b`)	Leave empty to keep the same.		
Share of your list in the test (`ab.split`)			20%
The winner is whoever... (`ab.metric`)		Pick one. Choices: Clicked a link; Replied; Opened the email.	Clicked a link
Wait ... hours before sending the winner (`ab.wait_hours`)			4

Buttons

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Send me a test	Saves and sends a test to you.		
Save draft			
Approve & send / Approve & schedule	Confirms the number reached, channel and time, then queues. If a legal check is needed a sheet asks you to confirm first.		
Delete draft	Asks to confirm.		

Automations

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Automation on/off toggle (`on`)	Switches one automation on or off.		
Autopilot / Ask me first (`mode`)	Autopilot sends on its own; Ask me first waits in Approvals.	Pick one. Choices: Autopilot; Ask me first.	
All on Autopilot / Ask me first for all	Applies to every automation except special ones and new leads.		
Step: use this step (`on`)	Not on the first step.		On
Step: after ... days (`wait`)	Wait before this step (stored as hours).		
Step: channel (`ch`)		Pick one. Choices: Best channel; Text; Email.	Best channel
Edit wording: Email subject / Email / Text message (`subject, email, sms`)	Details in {braces} fill per customer; {customer_first_name|there} falls back to "there".		
Save wording / Back to the default			

Steps

1. Press **New campaign** and choose a template.
2. Name it and choose **Send by**.
3. Set the audience; watch the count.
4. Write the message (use **Write it for me** if you like) and check the preview.
5. Choose **When** and optionally **Test two versions**.
6. Press **Send me a test**, then **Approve & send**.

If something goes wrong

- "Nobody in this audience can be reached yet" means widen the filters or change channel.
- "Pick a picture under 6 MB."
- "Pick the date and time." for a timed send.
- Empty details warn you under the preview; add a fallback like {customer_first_name|there}.

Training course builder and Assign dialog

Every box in the course builder (about the course, steps, quizzes, publishing) and the Assign dialog.

Contractor Hub → **Training** → **Courses** → **New course** (or **Open** a course, or **Use as a draft** on a starter template). **Assign** is on published courses. Employees take courses in My work.

You build a course from sections and steps, publish it as a version, then assign it to people with a due date. Starter templates are drafts to check before use. People who already started an older version keep it.

Before you start

- Employees need to be added and linked first (Field work → Team).

Fields

About this course (arrow)

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Title (`title`)	Course name (max 140).		
Category (`category`)	Max 40 characters.	Safety, Equipment, Customer service...	
Difficulty (`difficulty`)		Pick one. Choices: Beginner; Intermediate; Advanced.	
Time it takes (minutes) (`est_minutes`)	Used for the safety-hours report; the time you expect, not measured.	Max 1440.	0
Order of steps (`order_mode`)	Whether steps can be taken in any order.	Pick one. Choices: Any order; One after another.	
Language (`language`)	Short code.	en, es...	
Is this a translation of another course? (`translation_of`)	Links a translation; employees who choose that language are offered it.		No - this is the original
Description (`description`)	Max 600 characters.		
What people will be able to do (one per line) (`objectives`)			
Skills it proves (comma-separated) (`skills`)	Shown in the skills list for everyone who finishes it.		
Must finish first (`prerequisites`)	Other published courses to finish first.		
Certificate expires after (days) (`renew_days`)	0 = never. When it expires the course is assigned again if automatic renewal is on.	Max 3650.	0
Certificate title (`cert_title`)	Wording on the certificate.		Course title
Give a certificate when finished (`certificate`)			Off
A manager approves each certificate first (`cert_approval`)			Off
Required training (`required`)	Marks the course as required.		Off

Sections and steps

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Section title (`modules[].title`)	Name of a section. + Add a section adds one; Remove empty section works only on an empty one.		
Kind of step to add (`type`)	Type of the next step.	Pick one. Choices: Reading; Video; Audio; Picture; PDF; Other file; Link; Checklist; Quiz; Survey; Practical task; Acknowledgment.	Reading
Step title (`title`)	Max 140.		
Text / Words shown above the step (`body`)	Bold, bullet, numbered, heading and link buttons; https links only.		
File (upload or choose) (`media_id`)	Video, audio, picture, PDF, other file. Choose from files already uploaded.		
Link (https) (`url`)	For Link steps.	https://...	
Length (seconds) (`duration`)	Video/audio length; filled on upload.		
Share that must be watched (%) (`min_pct`)	Percent of a video/audio to count as done.		90
Captions (`captions_id`)	Captions for video.		

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Written transcript (recommended) (`transcript`)			
Items to tick (`items`)	For Checklist steps; add or remove items.		
Wording the employee agrees to (`wording`)	Max 300; kept with the date. A record of reading, not a legal signature.		I have read and understood this.
What the employee should do (`instructions`)	Practical task text.		
They must attach a picture of their work (`needs_photo`)			On
Minutes (`est_minutes`)	Time for this step (max 240).		0
Optional (not needed to finish) (`optional`)			Off
Move up / Move down / Remove step			

Quiz and survey steps

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Pass mark (%) (`pass_score`)	Quiz only.		80
Tries allowed (0 = no limit) (`attempts_max`)			0
Time limit (minutes, 0 = none) (`time_limit`)			0
After a wrong try (`retake`)		Pick one. Choices: Can try again at once; Must wait first; Must review the course first.	Can try again at once
Hours to wait (`wait_hours`)	Used with "Must wait first".		0
Show after answering (`reveal`)		Pick one. Choices: Right or wrong, with the explanation; Also the right answer.	Right or wrong, with the explanation
Mix up the order of questions and answers for each try (`shuffle`)			Off
Kind of question (`type`)		Pick one. Choices: One right answer; Several right answers; True or false; Put in order; Match pairs; Written answer (a person grades it).	One right answer
Question (`prompt`)	Max 400.		
Choices (mark the right one/ones) (`options`)	Min 2 choices.		
The statement is true (`correct`)	True or false questions.		
Steps in the RIGHT order (`options`)	People see them mixed up.		
Pairs (left and right) (`pairs`)	Min 2 pairs; right side is mixed up.		
What a good answer covers (`sample`)	Only the person grading sees it.		
Explanation shown afterwards (`explanation`)	Max 600.		
Points (`weight`)			1

Top buttons and publishing

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Save draft			
Preview as an employee			
Publish / Publish a new version	Opens a dialog. For a new version you can tick "Ask people who finished an earlier version to take it again".		
Versions / Duplicate / Archive / Restore			

Assign dialog

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
People (tick boxes) (`emps`)	Who gets the course; Everyone selects all. People who already have it are skipped.		
Days to finish (`due_days`)	Due date after the start.		14

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Start on (optional) (`start_on`)			Today
Required (`required`)			The course setting
Assign	Needs at least one person.		

Steps

1. Press **New course** (or **Use as a draft** on a starter template).
2. Fill **About this course**.
3. Name the section, pick a step kind and press **+ Add a step**; fill the step.
4. Add quizzes with their settings and questions.
5. Press **Save draft**, then **Preview as an employee**.
6. Press **Publish**.
7. Press **Assign**, tick people, set **Days to finish** and press **Assign**.

If something goes wrong

- "Pick at least one person." in Assign.
- A video from another website cannot be tracked; upload the file.
- Saving shows "Changes not published" until you publish again.

Settings → VisionScaper: Contractor payments and fees

Set processing rates and turn bank (ACH) and Instant Payouts on or off.

Open the WordPress dashboard and go to **Settings → VisionScaper**. Only users who can manage options (administrators) see this page. The **Contractor payments (Stripe Connect)** block sets what contractors pay on customer payments. Contractors connect their own Stripe account from the Hub. All defaults are placeholders, not approved.

Before you start

- Stripe keys saved; Connect enabled in Stripe.

Fields

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Card payments — % per payment `fee_card_pct`	Percentage a contractor pays on each card / Apple Pay / Google Pay payment. Saved range 0–15.	Percent, e.g. 3.5.	number; default 3.5 (placeholder, not approved)
Card payments — fixed $ per payment `fee_card_fixed`	Flat amount added to the card percentage. Saved range 0–5.	Dollars, e.g. 0.30.	number; default 0.30 (placeholder, not approved)
Bank (ACH) payments — % per payment `fee_ach_pct`	Percentage on bank payments. Saved range 0–15.	Percent.	number; default 1.5 (placeholder, not approved)
Instant Payouts — % of the payout `fee_instant_pct`	Percentage on instant payouts. Saved range 0–15.	Percent.	number; default 2.5 (placeholder, not approved)
Let customers pay by bank account (ACH) `pay_ach`	Shows the bank-payment option on invoices.	Tick to allow.	checkbox; default on (1)
Offer contractors Instant Payouts `pay_instant`	Offers Instant Payouts to contractors.	Tick after Stripe setup.	checkbox; default off (0)

Steps

1. Go to **Contractor payments (Stripe Connect)**.
2. Add the webhook events listed on the page.
3. Enter the four rates.
4. Tick the payment options.
5. Press **Save Changes**.

Tips

- Test Instant Payouts in test mode first (page text).

If something goes wrong

- Bank option missing on invoices: check ACH tick.

Door-to-door house form and Measure property forms

The house visit form on the Door-to-door map, and the Measure property steps (address, area name and kind, roof pitch, notes, new contact).

Contractor Hub → **Door-to-door** (map of houses) and Contractor Hub → **Measure** (Measure property). Phone roles need the canvass and measure permissions in the permission grid.

Door-to-door records what happened at each house so nobody gets knocked twice and "do not come back" houses are protected. Measure property draws areas on an aerial map and gives square feet that can be attached to a customer and used in a quote.

Fields

Door-to-door: house form

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Address (`address`)	The house address (looked up from the map).		
What happened? (`status`)	Flyer left, Not home, Talked with them, Interested, Wants a quote (becomes a lead), Call back / come back, Not interested, Already a customer, Uses another company, Vacant / for sale, Can't reach the door, Do not come back, No soliciting sign. The last two are never knocked again and clear the follow-up date.	Tap one. Choices: Flyer left; Not home; Talked with them; Interested; Wants a quote; Call back / come back; Not interested; Already a customer; Uses another company; Vacant / for sale; Can't reach the door; Do not come back; No soliciting sign.	
Also (`flags`)	Extra ticks.	Tap any. Choices: Flyer / door hanger left; Business card given; Spoke to the owner; Renter / tenant; HOA neighborhood; Needs lawn care; Beds / mulch need work; Hardscape opportunity; Tree work needed; Snow removal prospect.	
Name (`name`)	Shown for talked/interested/quote/callback/not interested/customer/competitor statuses.		
Phone (`phone`)			
Email (`email`)			
Follow up on (`follow_up`)	Pre-filled after some statuses (interested +3 days, call back +2, quote +1, flyer +14, talked +7).		
Notes (`notes`)	What they said, what the yard needs, best time to come back.		
Save this visit / Save			
Directions / Add to your customers / Open customer / Delete	Add to your customers makes a customer for a house with contact details; Delete has Undo.		

Door-to-door: map controls

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Where am I	Shows your location.		
List	List view of houses.		
Follow-ups due	Lists houses to revisit.		
Status filter chips (`filter`)	Show only chosen statuses.		

Measure: step 1 and 2

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Property address (`address`)	The property to show on the map.	123 Main Street, Town, ST.	
Search your customers (`q`)	Picks a customer and their property.		
Show the property	Opens the map.		
Go to another address (`jump`)	Moves the map.		
Undo / Clear shape / Close shape / Finish	Drawing controls.		

Measure: name each area (pop-up)

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
What is it? (`kind`)	Lawn / grass, Roof, Planting bed, Patio / walkway, Driveway, Whole property, Other.	Tap one. Choices: Lawn / grass; Roof; Planting bed; Patio / walkway; Driveway; Whole property; Other.	Last used / Lawn
Name (`name`)	Up to 60 characters. Auto-names until you edit it.		
Roof pitch (rise per 12 in.) (`pitch`)	Only for Roof; gives the real roof surface from the view above.	Pick one. Choices: Flat / not a roof; 3/12 (low); 4/12; 5/12; 6/12 (common); 7/12; 8/12; 9/12; 10/12; 12/12 (steep).	6/12 (common)
Save & measure another area / Save & finish / Discard this shape			

Measure: step 3 save or print

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Notes for the report (`note`)	Printed on the report.	e.g. back lawn slopes.	
Save to this device / Print / Save to customer	Downloads the report picture, prints, or attaches to a customer.		
New contact: Name (`name`)	Creates a customer and attaches the measurement.		
New contact: Mobile / Email (`phone, email`)			
New contact: Street address / Town / State / ZIP	Pre-filled from the address.		
Create contact & attach measurements			
Choose existing: search + property chips + Attach	Pick a customer, then the property or "New property".		

Steps

1. In Door-to-door, tap a house or drop a new one. Pick **What happened?**.
2. Add **Also** ticks, contact details if they gave them, a **Follow up on** date and **Notes**, then **Save this visit**.
3. In Measure, enter the address, press **Show the property**, tap corners and **Finish**, choose **What is it?**, **Name**, roof pitch if needed.
4. Press **Save & finish**, add **Notes for the report**, then save to a customer or print.

If something goes wrong

- "Do not knock" banners mean the house was marked Do not come back or No soliciting.
- "That shape is too small - try again." The area was under 4 sq ft.
- Measured from above: slopes are a little larger on the ground, and trees can hide edges.

Designer: Mulch, stone & lawn brush controls

Every control on the Mulch, stone & lawn tab: mode, brush size, softness, opacity, photo shadows, 3D depth, perspective and the material picker.

You find this screen in the Designer: open a design, tap **Add** in the tool bar, then tap the **Mulch, stone & lawn** tab at the top of the side panel. Anyone using the Designer can see it, signed in or not. It controls the ground brush: you paint mulch, stone, lawn or pavers straight onto the photo, and these controls decide how the brush behaves and how the paint blends into your picture.

The sliders that say "painted ground" are saved with the design, so they apply to everything you have painted, not only to the next stroke. For the story behind the tool, read paint ground materials.

Before you start

- Open a design with a photo or a bird’s-eye view. The panel is empty until a design is open.
- Set the scale first on a photo (set the scale for me). The 3D depth and perspective sliders look best when the scale is right.

Fields

Brush mode

One of three buttons. Only one is on at a time.

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Paint / Undo paint / Show original (three buttons in a row) `opts.paint.erase / opts.paint.restore`	Paint lays the chosen material down. Undo paint rubs out ground paint you made earlier. Show original brings back the untouched photo where you brush, which also undoes erasing and AI changes in just that spot.	Options: Paint; Undo paint; Show original. Tap the mode, then drag over the photo. In Show original mode the Opacity, photo-shadow, 3D depth and perspective sliders and the material list are hidden because they do not apply.	Paint

Brush shape

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Brush size `opts.paint.size`	Sets how wide each stroke is, in screen pixels of the photo.	Options: 6 to 260 px, step 2. Drag the slider. The number to the right shows the size, for example 80 px.	40 px
Smaller brush (button)	Divides the brush size by 1.25 each tap, to a minimum of 6 px.	Tap once per step.	n/a
Bigger brush (button)	Multiplies the brush size by 1.25 each tap, to a maximum of 260 px.	Tap once per step.	n/a
Sharp edge / Blended edge (two buttons) `opts.paint.soft`	Sharp edge gives a hard stroke edge. Blended edge feathers the edge into the photo; choosing it sets softness to 6 px and shows the Softness slider.	Options: Sharp edge; Blended edge. Tap Blended edge for natural mulch-to-lawn transitions. Tap Sharp edge for crisp bed lines.	Sharp edge
Softness `opts.paint.soft`	How wide the feathered edge is.	Options: 1 to 24 px, step 1. Drag the slider. Larger numbers give a wider fade.	6 px after you choose Blended edge
Opacity `opts.paint.alpha`	How solid the paint is. Lower numbers let the photo show through.	Options: 10 to 100 %, step 1. Drag the slider, for example 70 % to let the old ground show through lightly.	100 %

How the paint blends into the photo

These three sliders are saved with the whole design, not just the brush. They are hidden in Show original mode.

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Photo shadows on painted ground `project.groundShade`	How much of the photo’s own shade (from trees and the house) is carried onto painted mulch, lawn and stone. At 0 % the paint is evenly lit; higher numbers match the photo more.	Options: 0 to 100 %, step 5. Drag to the right where your photo has strong shade. Use 0 % for an evenly lit bed.	30 %
3D depth of painted ground `project.groundDepth`	How strongly the painted material shows light and relief (bumps and grain) so it looks like a real surface instead of a flat sticker. It also follows the sun direction chosen on the scene bar.	Options: 0 to 100 %, step 5. Drag right for more relief on gravel and mulch. Drag left for a flatter look.	60 %
Perspective of painted ground `project.groundPersp`	How strongly the texture shrinks toward the horizon so far ground looks far away. 0 % leaves it flat.	Options: 0 to 100 %, step 5. Leave it alone after you set the scale. Lower it if the texture looks too squeezed in the distance.	80 %; 100 % when the scale has been verified (phone tilt, measured things)

Material

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Search N materials (box with a magnifier; N is the number of materials)	Narrows the swatch grid below it to materials whose name, group, id or tags contain every word you type. It does not change the design by itself.	Type one or more words such as "red mulch" or "bluestone". Every word must match.	Empty
Search materials by voice (microphone button next to the box)	Listens through your browser and types what you say into the search box.	Tap it, allow the microphone if asked, then speak. Not every browser supports speech; if yours does not, a message says voice search is not available.	Off
Material group chips	Shows only one kind of material in the grid. All shows every group.	Options: All; Mulch; Stone & Gravel; Soil & Sand; Lawn & Groundcover; Pavers; Natural Stone; Tile & Marble; Wood & Decking; Decking & Surfaces. Tap one chip. Tap All to clear it.	All
Material swatch grid	Picks the material the brush paints with. Choosing a tile also switches the mode back to Paint.	Tap one tile. The chosen tile gets a highlight. The material name is under each picture.	Mulch

Add an area (button above the brush controls)

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Add an area `data-act add-area`	Opens the guided Add an area wizard (where, then what) instead of brushing by hand.	Tap it. See the Add an area wizard and the field table for it in this chapter.	n/a

Steps

1. Open your design and tap **Add**, then **Mulch, stone & lawn**.
2. Leave the mode on **Paint**.
3. Pick a material: type in the search box, or tap a group chip, then tap a tile.
4. Set **Brush size**. Use **Bigger** or **Smaller** to change it in steps.
5. Choose **Sharp edge** for crisp beds or **Blended edge** for soft transitions. If you chose Blended, set **Softness**.
6. Drag over the ground in the photo. Paint is applied as you drag.
7. Look at the result. If it looks pasted on, raise **Photo shadows on painted ground** a little, then check **3D depth** and **Perspective**.
8. Use **Undo paint** mode to rub out a spot, or **Show original** to bring back the plain photo there. The Undo button at the top also works.
9. Nothing needs saving. The Designer saves by itself; the word Saved near the top confirms it.

Tips

- Paint on a new Layer if you want to hide or compare the ground work later (see the layers table in this chapter).
- A low Opacity with a Blended edge is the easiest way to fade new mulch into old mulch.

If something goes wrong

- **The paint looks flat or fake.** Raise 3D depth and Photo shadows, and make sure the scale is set.
- **The texture is huge or tiny.** The scale is wrong. Open Photo setup, then Scale.
- **Nothing happens when I drag.** Check the mode is Paint, not Undo paint or Show original, and that a material is chosen.
- **I painted over a plant.** Plants stay in front of painted ground. If a plant looks hidden, use Arrange (Bring to front) on the plant.

Designer: Draw beds & patios (Shapes) controls

Every control for the Shapes tool and for editing a shape you already drew: outline style, fill, width, wall height, edging, material, opacity.

You find this in the Designer: tap **Add**, then the **Draw beds & patios** tab. When a shape is already drawn, tap it with the Move tool to get a second panel for editing that shape. Anyone using the Designer can use it.

The tool draws real, editable shapes (beds, patios, lawns, walkways, walls and edging) with perspective and undo. The first table is the drawing panel. The second is the panel for a shape you tapped. Background: draw beds, patios and edging.

Before you start

- Open a design. Set the scale first on photos so walkway width and wall height come out the right size.

Fields

Drawing panel: choose the shape

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Landscape shapes (six buttons) `opts.bed.shape`	Chooses what you are about to draw. Beds, patios and lawns are filled areas. Walkways, walls and edging are lines. Each choice also picks a matching starting material (a wall gets a wall material, patio and walkway get a paver-type material, lawn gets a lawn material) and switches tap-to-fill on.	Options: Planting bed; Patio; Lawn; Walkway; Retaining wall; Edging. Tap one button, then tap points on the photo. A line under the buttons explains how to draw the chosen shape.	Planting bed
How do you want to outline it? `opts.bed.curved / opts.bed.rect`	Curved smooths the outline between your points. Straight joins your points with straight lines. Rectangle lets you press and drag one box and follows the photo's perspective.	Options: Curved edges; Straight edges; Rectangle (area shapes only); Curved / Straight (line shapes). Pick before you start tapping. Changing it cancels a half-drawn shape.	Curved edges
Draw outlines first, choose materials later `opts.bed.outline`	When on, a finished area is an outline with no material yet so you can draw several beds first and fill them all after.	Untick it if you want each shape to take the selected material the moment you close it.	Checked
Width `opts.bed.width`	The true width of a walkway. It narrows into the distance by perspective.	Options: 2 to 12 ft, step 6 in. Drag the slider; the number shows feet and inches.	4 ft
Wall height `opts.bed.height`	How tall the wall rises straight up from the line you tap along its base.	Options: 6 in to 6 ft, step 6 in. Drag the slider before or after drawing.	2 ft
Cap stones on top `opts.bed.cap`	Adds a row of cap stones along the top of the wall.	Untick for a plain wall top.	Checked
Border / edging (Edging type when the shape is Edging) `opts.bed.edging`	Draws a border line around beds and patios, or sets the material of an Edging line. Not shown for Retaining wall or Lawn.	Options: None (not offered for the Edging shape); Metal; Plastic; Stone; Brick. Tap one.	Metal

Drawing panel: finishing and filling

These controls appear only when they apply.

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Close loop (area shapes) / Finish (line shapes)	Finishes the shape. Same as tapping the big Start point.	Tap after placing your points.	Greyed out until 3 points (areas) or 2 points (lines)
Back 1 point	Removes the last point you placed (Backspace).	Tap it, or press Backspace.	n/a
Clear	Throws away the half-drawn shape (Esc).	Tap it, or press Esc.	n/a
Selected material / Change ↓ `opts.bed.fillMat`	Shows which material the Fill buttons will use. Change ↓ scrolls down to the material picker.	Tap Change ↓, then pick a tile.	Mulch
Fill all N with	Paints every drawn area with the selected material in one tap.	Tap once.	n/a
Tap a shape to fill it (on) / (off) `opts.bed.fill`	When on, tapping an existing shape on the photo fills it with the selected material. Turn it off to draw a new shape inside an existing one.	Tap to switch.	On
Fill (per shape in the list)	Fills only that shape.	Tap on the shape's row.	Disabled if the shape already has that material
Rename (pencil icon on each shape's row)	Gives the shape a name (up to 40 characters) shown in the list and in Layers.	Type a name such as "Front bed" and press OK.	Bed 1, Bed 2 …
Edit (pointer icon on each shape's row)	Switches to the Move tool and selects the shape so you can reshape it.	Tap it.	n/a
Fine-tune what you just drew: Remove point / Undo / Done	Lets you drag white dots, add dots at the teal plus signs, delete a tapped dot and finish.	Drag a dot to move it. Tap Done when happy.	Remove point greyed until you tap a dot

Drawing panel: material

Shown as "Materials: pick one to fill with" for areas, "Wall material" for walls and "Material" for walkways. Not shown for Edging.

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Search N materials (box with a magnifier; N is the number of materials)	Narrows the swatch grid below it to materials whose name, group, id or tags contain every word you type. It does not change the design by itself.	Type one or more words such as "red mulch" or "bluestone". Every word must match.	Empty
Search materials by voice (microphone button next to the box)	Listens through your browser and types what you say into the search box.	Tap it, allow the microphone if asked, then speak. Not every browser supports speech; if yours does not, a message says voice search is not available.	Off
Material group chips	Shows only one kind of material in the grid. All shows every group.	Options: All; Mulch; Stone & Gravel; Soil & Sand; Lawn & Groundcover; Pavers; Natural Stone; Tile & Marble; Wood & Decking; Decking & Surfaces. Tap one chip. Tap All to clear it.	All
Material swatch grid	Picks the material for the next shape and the Fill buttons.	Tap one tile. The chosen tile gets a highlight. The material name is under each picture.	Mulch

Panel for a shape you tapped (Move tool)

Tap a bed, patio, lawn, walkway, wall or edging with the Move tool.

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Done (X in the top right)	Closes the shape panel.	Tap it.	n/a
Remove selected point `data-act op-delpt`	Deletes the dot you tapped (a polygon keeps at least 3 dots; a line keeps 2).	Tap a white dot on the photo first, then this button.	Greyed out until you tap a dot
Undo (inside the shape panel) `data-act op-undo`	Undoes the last edit.	Tap it.	n/a
Shape `op.straight`	Switches an area between smooth and straight edges.	Options: Curved; Straight. Tap one.	As drawn
Path `op.curved`	Switches a line between smooth and straight.	Options: Curved; Straight. Tap one.	As drawn
Width `op.width`	Changes the walkway width.	Options: 2 to 12 ft, step 6 in. Drag.	4 ft
Height `op.height`	Changes wall height.	Options: 6 in to 6 ft, step 6 in. Drag.	2 ft
Cap stones on top (shape panel) `op.cap`	Adds or removes the wall cap.	Tick or untick.	Checked
Border / edging, or Edging `op.edging`	Changes the border or the edging material.	Options: None (not for edging); Metal; Plastic; Stone; Brick. Tap one.	As drawn
Material (swatch grid, shape panel) `op.mat`	Swaps the material of this one shape. Not shown for edging.	Search, pick a group chip and tap a tile (same picker as above).	As drawn
Smaller / Bigger	Scales the whole shape down or up by 10 % each tap.	Tap as needed.	n/a
Opacity `op.alpha`	How see-through this shape is.	Options: 10 to 100 %, step 1. Drag.	100 %
Soft edge `op.soft`	Feathers the edge of a painted or filled region.	Options: 0 to 20 px, step 1. Drag.	0 px
Duplicate / On top / Below / Remove	Makes a copy; moves the shape one step up or down in the stack; deletes the shape (Undo brings it back).	Tap the one you need.	n/a

Steps

1. Tap **Add**, then **Draw beds & patios**.
2. Choose the shape in **Landscape shapes** (for example **Planting bed**).
3. Choose how to outline it: **Curved edges**, **Straight edges** or **Rectangle**.
4. For a walkway set **Width**. For a wall set **Wall height** and decide on **Cap stones on top**.
5. Tap around the area on the photo. Tap the big **Start** point or **Close loop** to finish. Lines end with **Finish**.
6. Pick a material in the picker, then tap the new shape (tap-to-fill) or press **Fill all**.
7. Drag the white dots to fine-tune, then press **Done**.
8. To change it later, tap the shape with the Move tool and use the shape panel. Press **Done** (X) when finished.
9. Autosave keeps your work. Check that the status near the top says Saved.

Tips

- Draw all your beds first with "Draw outlines first, choose materials later" ticked, then press Fill all.
- Name each bed so you can find it in Layers and in your plant list.

If something goes wrong

- **Close loop is greyed out.** An area needs at least three points.
- **Tapping a bed starts a new shape instead of filling it.** Tap-to-fill is off. Turn it on.

- **My wall looks too tall or short.** Check the scale in Photo setup, then Wall height.
- **A dot will not delete.** Shapes keep a minimum number of dots (3 for areas, 2 for lines).

Designer: Selected plant or feature panel

Every control in the panel that opens when you tap a plant or feature: age, move, size, turn and flip, copies, order, blend, shadow and layer.

You find this panel in the Designer by tapping any plant or feature you have placed with the Move or Add tool. It replaces the side panel until you press **Done**. It is available to every Designer user.

The panel shows the plant name, its size today and fully grown, a growth chart, and the controls below. Background reading: move, resize, turn, flip and copy and plant age and the time machine.

Before you start

- Place at least one plant or feature (place a plant).

Fields

Plants only

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Size when planted `o.age`	Sets how big the plant is the day it goes in the ground. The See it grow slider then grows it from there using the plant's real growth data.	Options: 0 up to the plant's maximum nursery age, step 1. Drag the slider. The label next to it shows a nursery size name and the plant height at that age; both come from the plant data.	0, or the plant's usual nursery size
Height (number box, in ft) `o.scale`	Sets how tall the plant is at the year shown on the See it grow slider and keeps growing realistically from there.	Options: 0.1 to 200, step 0.5. Type a height in feet, for example 4.5, then press Enter or click away.	Current height at the year shown on See it grow
Smaller / Bigger / Usual size (three buttons)	Smaller shrinks the plant by 10 % per tap (divide by 1.1). Bigger grows it by 10 %. Usual size resets age and scale to the plant's normal nursery size.	Tap.	n/a

Features only (benches, planters, lighting and so on)

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Smaller / Bigger / Real size	Changes the look-size by 10 % per tap, between 30 % and 300 %. Real size resets to 100 %.	Tap.	n/a
Exact size (%) `o.scale`	Sets the look-size as a percentage of real size.	Options: 30 to 300, step 1. Type 120 for 20 % bigger than real.	100

Move

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Nudge distance	How far each arrow tap moves the item.	Options: 6"; 1 ft; 3 ft. Pick the distance, then tap an arrow.	1 ft
Move away (farther) ▲ / Move left ◀ / Move right ▶ / Move closer ▼	Moves the item by the nudge distance. On photos up and down move it farther or closer on the ground, so it shrinks or grows with perspective. On a bird's-eye view the arrows move it on the map.	Tap.	n/a
X `o.x`	Exact horizontal position in picture pixels.	Type a whole number. Only needed for precise placement.	Current position
Y `o.y`	Exact vertical position in picture pixels.	Type a whole number.	Current position

Turn & flip

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Turn left 90° / Turn right 90° / A little left / A little right	Rotates by 90 degrees or 15 degrees.	Tap.	n/a
Flip left ↔ right / Flip up ↕ down	Mirrors the item sideways or upside down.	Tap.	n/a
Stand it straight	Sets the angle back to 0.	Tap.	n/a
Angle `o.rot`	Turns the item to an exact angle.	Options: -180 to 180 °, step 1. Drag. You can also drag the round handle above the item on the photo.	0°

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Set angle `o.rot`	Same as the slider but typed.	Options: -180 to 180. Type 45.	0

Duplicate

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Copy, facing the other way	Makes one mirrored copy beside it.	Tap.	n/a
How many	How many plants make up the group (including the original).	Options: 2 to 25. Type a number.	3
Spacing (ft)	Distance between plants.	Options: 0.5 to 50, step 0.5. Type, for example 4.	The plant’s mature spread rounded to 0.5 ft, at least 1 ft
In a row / Natural cluster	The layout of the group.	Options: In a row; Natural cluster. Tap one.	In a row
Plant the group	Plants the group. If there is no room it says so and asks for smaller spacing.	Tap.	n/a

Arrange (in front / behind)

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Bring to front / Bring forward / Send backward / Send to back	Changes which items overlap which.	Tap.	n/a

Blend into the photo

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Auto blend	Matches brightness, contrast, color, warmth and shadow to the photo around the item.	Tap.	n/a
Reset (blend)	Clears blend and shadow settings and puts opacity back to 100 %.	Tap.	n/a
Brightness `o.fx.b`	Lightens or darkens this item only.	Options: -100 to 100. Drag.	0
Contrast `o.fx.c`	Contrast for this item only.	Options: -100 to 100. Drag.	0
Saturation `o.fx.s`	Color strength for this item only.	Options: -100 to 100. Drag.	0
Warmth `o.fx.w`	Cooler (negative) or warmer (positive) tone.	Options: -100 to 100. Drag.	0
Ground shadow `o.sh.off`	Turns the shadow on the ground under the item on or off.	Untick for no shadow.	Checked
Opacity (shadow) `o.sh.k`	How dark the shadow is.	Options: 0 to 200 %. Drag.	100 %
Length (shadow) `o.sh.len`	How long the shadow is.	Options: 0 to 300 %. Drag.	100 %
Softness (shadow) `o.sh.soft`	How blurred the edge of the shadow is.	Options: 0 to 100 %. Drag.	50 %
Sun (scene) / From left / From right `o.sh.dir`	Which way the shadow falls. Match the shadows in your photo.	Options: Sun (scene); From left; From right. Tap one.	Sun (scene)

Layer

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Name `o.name`	A name shown in Layers and lists.	Options: Up to 40 characters. Type "Hydrangea by the door".	Empty (the plant’s own name is shown)
Opacity `o.alpha`	How see-through the item is.	Options: 10 to 100 %. Drag.	100 %
Lock	Stops the item being moved by accident and deselects it. Unlock it in Layers.	Tap.	n/a
Hide	Hides the item. Show it again in Layers.	Tap.	n/a

Bottom of the panel

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Save to board (heart)	Saves this plant to your Inspiration Board on this device.	Tap.	n/a
Remove	Deletes the item. Undo brings it back.	Tap.	n/a
← Done	Closes the panel and deselects the item.	Tap.	n/a

Steps

1. Tap the plant or feature on the photo.
2. For a plant set **Size when planted** first. Then use **Height** only if the real plant is a known size.

3. Use **Move** (arrows, or drag on the photo) to place it.
4. Use **Turn & flip** to face it the right way. Plants flip left or right more often than they rotate.
5. To plant several, set **How many** and **Spacing**, choose a layout and press **Plant the group**.
6. Open **Blend into the photo** and press **Auto blend**. Fine-tune with the sliders, then check **Shadow** direction.
7. Optionally give it a **Name** in the Layer section.
8. Press **Done**. The design saves by itself.

Tips

- Press Auto blend before touching individual sliders; it often gets you most of the way.
- Match Shadow direction to your photo: look at where existing shadows fall.

If something goes wrong

- **A plant jumps to a different size when I move the time slider.** That is the growth model working. Use Size when planted to set its starting size.
- **The plant will not move.** It is locked. Open Layers and unlock it.
- **I cannot find a plant I hid.** Open Layers (top right) and use the eye button.

Designer: Scale and eye-level controls

Every control on the Scale tab: Set it up for me, the 6-ft people check, measuring a known object, the tape, and the bird’s-eye map scale.

You find this in the Designer: tap **Photo setup** in the tool bar, then the **Scale** tab. The small chip under the picture ("Set the scale (how big things are)", later "Scale: good", "Scale: okay" or "Scale: check it") opens it too. Anyone can use it; two helpers (door finding by AI) need you to sign in.

Scale decides how big a plant looks at a given distance, so plants and the See it grow slider match your yard. The panel for a photo and the panel for a bird’s-eye view are different; both are listed. Background: set the scale for me and measure things to set scale.

Before you start

- Open a design with a photo. Bird’s-eye views are already to scale.
- For **Find it for me**, **Set it up for me** door finding and similar, sign in (free). Without sign-in the tool still works from the lines in your photo.

Fields

Photo views: Set the scale for me

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Set it up for me	Finds eye level from your phone tilt, the straight lines in the photo and (if signed in) an AI estimate, and may spot a door, garage door, car or person to treat as a known size.	Tap it and wait for the message. It shows "Working…" while it runs.	n/a
Yes, that’s right / No, skip it	Appears when a dashed box was found. Yes uses that object as a known size. No ignores it.	Look at the dashed box on the photo first, then tap one.	n/a

Photo views: Do these people look right?

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
They look too big / They look too small	Adjusts the camera height by about 12 % (kept between 2 and 14 ft) so people and plants shrink (too big) or grow (too small). It is one undo step.	Tap, then look at the yellow 6-ft people again.	n/a
They look right — add plants →	Marks the scale as set, hides the people, and opens the plant library.	Tap when the people next to your house look real.	n/a
Test growth	Plants two sample shrubs, one near and one far, plays the growth, then removes them so you can check the scale.	Tap and watch.	n/a

Photo views: Measure something yourself (more exact)

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
What is it? `ui_scalePreset.id`	Chooses the known object and its typical height used as the starting height.	Options: Front door (80 in); Garage door (7 ft) (84 in); Garage door (8 ft) (96 in); Privacy fence (6 ft) (72 in); Car (57 in); Person (66 in); Something else (72 in). Pick the thing you will measure in the photo.	Front door
What did you measure?	A name for the object so you remember what you measured.	Options: Up to 40 characters. Type "mailbox", "gate" or "ladder". The Tap button stays off until you type.	Empty
How tall is it? Feet	Feet part of the real height.	Options: 0 to 20, step 1. Type the real height. Doors and garage doors vary.	Taken from the chosen object (door = 6)
How tall is it? Inches	Inches part of the real height. The total is limited to 6 to 240 inches.	Options: 0 to 11.5, step 0.5. Type 8.	Door = 8
Tape measure picture	A drag-the-end version of the two boxes above. Moving either changes the other.	Options: About 12 to 144 inches. Drag the metal end, tap the blade, or use arrow keys.	Follows the boxes
Tap its bottom and top	Starts a two-tap measurement on the photo.	Tap the very bottom where it meets the ground, then the very top.	Disabled unless the height is at least 24 in (and a name is typed for Something else)
Find it for me	Asks the AI to outline the object so you can confirm it.	Tap, then confirm the dashed box.	Only for Front door, both Garage doors, Car, Person; needs sign-in and the AI helper switched on
Yes, use it / No (dashed box question)	Accepts or rejects the AI’s outline as the known object.	Tap one.	n/a
Remove (on each measured object)	Deletes that measurement. Things listed "not used" were too small or did not fit the others.	Tap.	n/a

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Eye level (blue line on the photo) `cam.horizon`	The horizon height. Measured objects keep their size if you move it.	Drag only if it looks wrong. Usually measuring two things (near and far) sets it.	From phone tilt, lines or a guess

Bird’s-eye views

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Pixels per foot `view.ppf`	The map scale. Change it only if plants look the wrong size against the picture.	Options: 1 to 40, step 0.1. Drag a little and watch the plants.	Set when the view was made
Show a person for scale `opts.scale.person`	Draws a person-size marker on the map.	Untick to hide.	Checked

Steps

1. Open **Photo setup**, then **Scale**.
2. Tap **Set it up for me**. Read the message that appears.
3. If a dashed box shows, tap **Yes, that’s right** or **No, skip it**.
4. Look at the three yellow 6-ft people. Tap **They look too big** or **They look too small** until they look real next to your door.
5. For more exact results open **Measure something yourself**: pick **What is it?**, type the real height in the feet and inches boxes, then tap **Tap its bottom and top** and tap the photo twice.
6. Measure a second thing at a different distance if you can; this also sets eye level.
7. Tap **They look right — add plants →**.
8. Optionally tap **Test growth** to check the scale as sample shrubs grow.

Tips

- Pick something upright and at least 2 ft tall. Small things such as stones make the scale worse, so VisionScaper ignores them.
- A level phone held at eye height gives the best starting point.

If something goes wrong

- **Tap its bottom and top is greyed out.** The object is under 24 in, or you chose Something else and left the name empty.
- **Find it for me is greyed out.** Sign in, pick an object it can find, and ask your site owner to enable the AI helper.
- **A measurement says "not used".** It was too small in the picture or disagreed with the others. Remove it and measure something taller.
- **The chip says Scale: check it.** None of your measurements could be used. Measure a door, fence, car or person.

Designer: Crop, straighten and Adjust controls

Every control for Crop & straighten (angle, perspective, crop box, ratios) and for the Adjust sliders and presets.

You find these in the Designer: tap **Photo setup** in the tool bar, then **Crop** or **Adjust**. **Crop** opens a dialog straight away. Anyone using the Designer can use both.

Crop & straighten makes a new view, so your original stays untouched. Adjust changes light, color and detail without baking anything into the photo, so you can reset at any time. The dialog title is "Crop, rotate & perspective".

Before you start

- Open a design with a photo. Bird’s-eye views have little reason to be cropped this way.

Fields

Crop panel (before the dialog opens)

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Crop & straighten…	Opens the Crop, rotate & perspective dialog on the current view.	Tap it.	n/a

Crop, rotate & perspective dialog

A live preview with a thirds grid is shown above the controls, with the new size in pixels under it.

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
⟲ 90° / ⟳ 90°	Turns the photo a quarter turn left or right.	Tap as many times as needed.	n/a
Reset	Puts rotation, straighten, perspective and crop back to the start.	Tap.	n/a
Straighten `p.angle`	Levels a tilted horizon.	Options: -15 to 15 °, step 0.1. Drag until the grid lines match the horizon.	0.0°
Vertical perspective (leaning walls) `p.vert`	Fixes walls that lean in or out because the camera was tilted.	Options: -100 to 100, step 1. Drag until house corners are straight up and down.	0
Horizontal perspective `p.horiz`	Fixes sideways keystone distortion.	Options: -100 to 100, step 1. Drag.	0
Crop shape chips	Locks the crop box to a shape. Free lets Width and Height move separately.	Options: Free; 1:1; 4:3; 3:2; 16:9; 4:5. Tap one before using the crop sliders.	Free
Width (crop) `p.crop.w`	How much of the picture width to keep.	Options: 0 to 100 %. Drag.	100 %
Height (crop) `p.crop.h`	How much of the picture height to keep.	Options: 0 to 100 %. Drag.	100 %
From the left `p.crop.x`	Where the crop starts from the left edge.	Options: 0 to 100 %. Drag.	0 %
From the top `p.crop.y`	Where the crop starts from the top edge.	Options: 0 to 100 %. Drag.	0 %
Width (px)	Sets the crop width in exact pixels.	Options: 64 up to the picture width. Type 2000.	Placeholder shows the full width
Height (px)	Sets the crop height in exact pixels.	Options: 64 up to the picture height. Type 1500.	Placeholder shows the full height
Make a new view	Creates a new view from the result. Everything you placed moves with the photo. Your original view stays in the tabs.	Tap when the preview looks right.	n/a
Close (X)	Closes the dialog without making a view.	Tap.	n/a

Adjust panel: buttons and presets

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Hold to see original	Shows the unadjusted photo while you hold it down.	Press and hold; release to go back.	n/a
Reset all	Clears every adjustment.	Tap.	n/a
Preset chips	Applies a ready-made set of slider values in one tap.	Options: Bright & fresh; Golden hour; Lush green; Overcast fix; Soft & airy. Tap one; then fine-tune with the sliders.	None

Adjust panel: Light group (open by default)

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Exposure `adjust.exposure`	Overall light level.	Options: -100 to 100, step 1. Drag right to brighten a dark photo.	0
Brightness `adjust.brightness`	Brightness of mid-tones.	Options: -100 to 100, step 1. Drag.	0

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Contrast `adjust.contrast`	Difference between light and dark.	Options: -100 to 100, step 1. Drag.	0
Highlights `adjust.highlights`	Recovers or boosts the brightest areas.	Options: -100 to 100, step 1. Drag left to calm bright sky.	0
Shadows `adjust.shadows`	Lifts or deepens dark areas.	Options: -100 to 100, step 1. Drag right to see into shade.	0

Adjust panel: Color group

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Temperature (warm / cool) `adjust.temp`	Warmer (right) or cooler (left) color.	Options: -100 to 100, step 1. Drag.	0
Tint (green / magenta) `adjust.tint`	Shifts color between green and magenta.	Options: -100 to 100, step 1. Drag.	0
Saturation `adjust.saturation`	Overall color strength.	Options: -100 to 100, step 1. Drag.	0
Vibrance `adjust.vibrance`	Boosts muted colors more than strong ones.	Options: -100 to 100, step 1. Drag.	0
Hue `adjust.hue`	Rotates all colors around the color wheel.	Options: -180 to 180, step 1 (shown in degrees). Use sparingly.	0
Greens (lawn & leaves) `adjust.greens`	Boosts or tones down the greens only.	Options: -100 to 100, step 1. Drag right to make a tired lawn look fresher.	0

Adjust panel: Detail group

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Sharpen `adjust.sharpen`	Adds crispness.	Options: 0 to 100, step 1. Drag.	0
Reduce noise `adjust.denoise`	Smooths grain in dark photos.	Options: 0 to 100, step 1. Drag.	0
Blur `adjust.blur`	Softens the whole photo.	Options: 0 to 100, step 1. Drag.	0
Background blur `adjust.bgblur`	Softens the far background.	Options: 0 to 100, step 1. Drag.	0
Depth of field `adjust.dof`	Blurs by distance from the focus point.	Options: 0 to 100, step 1. Drag; set the focus point below.	0
Focus point (for blur) `adjust.focus`	Where the sharp zone sits from top to bottom of the picture.	Options: 5 to 95 %, step 1. Drag toward the part you want sharp.	60 %

Steps

1. Tap **Photo setup**, then **Crop**. In the dialog set **Straighten** until the horizon is level.
2. Use **Vertical perspective (leaning walls)** until house corners are straight.
3. Open **Crop**, choose a shape chip if you need one, and set the four crop sliders or the pixel boxes.
4. Press **Make a new view**. Check the new tab above the picture.
5. Back in Photo setup tap **Adjust**. Try a preset chip first.
6. Open the **Light**, **Color** and **Detail** groups and fine-tune.
7. Hold **Hold to see original** to check the effect. Use **Reset all** to start over.
8. The Designer saves for you. Adjustments are stored with the view, not baked into the photo.

Tips

- Straighten and fix perspective before you set the scale. A new view keeps its own scale, so check it.
- Small moves look better than big ones: stay under about 30 on most sliders.

If something goes wrong

- **The crop sliders fight each other.** A locked shape chip (not Free) forces the other side to follow. Choose Free.
- **My plants moved after cropping.** They move with the photo into the new view by design. Check the scale chip.
- **Adjust looks different when I save a picture.** Saved pictures include the adjustment; use Hold to see original to compare.

Designer: Measure & zones and the scene bar

Every control for Measure & zones, plus the bar under the picture: season, See it grow, day or night, sunlight, original photo.

You find **Measure & zones** in the Designer by tapping **Measure** in the tool bar. The **scene bar** is the strip under the picture; it is always visible while a design is open. Anyone can use both.

Measure works to scale on bird's-eye views and gives estimates (marked ≈) on photos. The scene bar changes how the whole picture looks: season, years of growth, night lighting and sun direction. Background: seasons and day-night and plant age and the time machine.

Before you start

- Set the scale first on photos for better estimates (set the scale for me).

Fields

Measure & zones panel

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Distance / Area / Zone `opts.measure.mode`	Distance: tap two points on the ground. Area: tap around a shape; tap the first point to finish. Zone: mark where plantings and hardscape go and what to keep or remove. Changing mode cancels a half-made measurement.	Options: Distance; Area; Zone. Tap the mode, then tap on the photo.	Distance
Zone type `opts.measure.zone`	The kind of zone you are drawing. Each has its own color on the photo.	Options: Planting zone; Hardscape zone; Existing – keep; Existing – remove. Pick before you draw.	Planting zone
Finish	Finishes the measurement. For Distance the second tap finishes it.	Tap.	Greyed out until 3 points
Cancel	Throws the unfinished measurement away.	Tap.	n/a
Name it (pencil on each saved item)	Names a saved measurement.	Options: Up to 40 characters. Type "Front walk" and press OK.	Empty (default words Distance, Area or the zone type)
Delete (trash on each saved item)	Removes the saved measurement.	Tap.	n/a
Keep showing them with other tools `ed.showMeas`	When ticked measurements stay on the photo in every tool; otherwise they show only in Measure.	Tick to keep them in view.	Unchecked

Scene bar: season

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Season buttons `project.season` / `project.look`	Shows plants in that season's leaf, flower and color. Peak look shows each plant in the season it looks its best.	Options: Peak look; Spring; Summer; Fall; Winter. Tap one.	Summer

Scene bar: See it grow

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Play growth (play / pause button)	Runs the year slider forward by itself, about 3 years per second, then stops at the end. Tap again to pause.	Tap play. It starts from 0 if the slider is near the end.	Stopped
See it grow (years from now slider) `project.years`	Shows every plant at its size that many years from now. The label reads "Today" or "In N yrs (year)".	Options: 0 up to 30 to 60 years (depends on the slowest plant in the design), step 1. Drag right to see the future. Use arrow keys for single years.	0 (Today)
Fully grown	Jumps the slider to the year everything you placed is fully grown.	Tap.	n/a

Scene bar: scale, original, sun and night

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Set the scale (how big things are) — or Scale: good / okay / check it (chip)	Opens the Scale tab. Its colour and words show whether the scale is confirmed.	Tap it, then follow the Scale controls article.	Hidden on bird's-eye views
Hold to see the original photo (eye button)	Shows the photo as it was before your design while held.	Press and hold.	n/a
Flip sunlight direction (sun button) `project.sun`	Switches the direction of light on painted ground and shadows between left and right.	Tap to flip.	Light from the left (-1)

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Toggle night lighting (moon / sun button) `project.night`	Switches the whole picture between day and night lighting.	Tap; the icon changes to a sun at night.	Day

Steps

1. Tap **Measure**, pick **Distance**, **Area** or **Zone**.
2. Tap points on the photo. For Area, tap the first point again (or **Finish**) to close it.
3. Tap the pencil on a saved item to name it.
4. Tick **Keep showing them with other tools** if you want them visible while you design.
5. Under the picture, choose a **Season** button.
6. Drag **See it grow**, or press play. Tap **Fully grown** to jump to maturity.
7. Press and hold the eye button to compare against the original photo.
8. Use the moon button for a night view and the sun button to flip light direction.

Tips

- Photo measurements are estimates. For exact numbers use a bird’s-eye view.
- Plants placed with a large "Size when planted" mature sooner, which lengthens or shortens the slider.

If something goes wrong

- **Finish is greyed out.** An area needs 3 points.
- **Everything is the wrong size when I slide the years.** The scale is off. Fix it in Scale.
- **Night looks too dark.** Switch back with the moon button; it is a view setting, not a change to the photo.

Designer: Plant library search, filters and zone finder

Every control for finding plants: search box, categories, Start with a goal, all filter groups, sort, hardiness zone and Find my hardiness zone.

You find the library in the Designer by tapping **Add**, then **Plants & things**. The same list also opens from the home screen. Anyone can use it. A filter never hides a plant unless you turn it on, and each chip shows how many plants it would give before you tap it.

Background: browse the plant library and filter plants.

Fields

Search and categories

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Search N plants & features `ds search`	Finds plants by words (name, color, light, "native" and more).	Type "red shade" and the list updates after a short pause.	Empty
Search library by voice (microphone)	Turns what you say into search words.	Tap, allow microphone, speak. Not available in every browser.	Off
Category chips `L.cat`	Chooses which kind of item is listed. Typing in the search box searches across all.	Options: Trees; Evergreens; Shrubs; Perennials; Grasses; Annuals; Vines; Features; My Library. Tap a chip.	Trees
Filters and more tools (disclosure)	Opens the filters, plus Add my own item and Plant ID buttons.	Tap to open.	Collapsed
Feature group chips (Features category only) `L.group`	Filters features by group instead of plant traits.	Options: All; plus each feature group such as Stone, Seating, Fire, Water, Lighting, Planters. Tap one.	All
Show N more	Loads the next 60 results.	Tap.	Hidden when everything is shown
i (plant facts, on each plant tile)	Opens the plant fact sheet and growth chart.	Tap the small i.	n/a
Edit (pencil on your own item tiles)	Opens that item to edit or delete.	Tap.	n/a

Sort and clear

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Sort `F.sort`	Orders the list.	Options: A to Z; Tallest first; Shortest first; Widest first; Fastest growing. Pick one.	A to Z
Clear N filters	Turns every filter off but keeps your hardiness zone.	Tap.	n/a

Start with a goal (one at a time)

Tapping a goal sets a ready-made filter. Tap again to clear.

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Goal chips `F.idea`	Each is a shortcut: for example Privacy screen means tall evergreen-type plants; Shady spot means shade-tolerant plants; Groundcover means low spreading plants.	Options: Privacy screen; Beside the house; Front of the bed; Shady spot; Deer-resistant; Native garden; Year-round interest; Fall color; Spring flowers; Summer color; Fast growers; Colorful leaves; Groundcover. Tap one. The group is open by default.	None

Filter groups (collapsed lists; selected choices appear next to the group name)

Within a group you can pick several unless it says one choice. A plant must match at least one pick in every group you use.

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Evergreen or not `F.habit`	Keeps evergreens, or plants that lose their leaves.	Options: Evergreen; Drops its leaves. Tap one.	None
Shape `F.shape`	Filters by growth habit.	Options: Upright & narrow; Pyramid & cone; Rounded & mounded; Arching & grassy; Weeping; Low & spreading; Bold leaves & clumps; Multi-stem; Climbing. Tap any.	None
Height when grown `F.height`	Filters by mature height.	Options: Under 3 ft; 3 to 15 ft; 15 to 40 ft; Over 40 ft. Tap one.	None
Width when grown `F.width`	Filters by mature width.	Options: Under 2 ft; 2 to 5 ft; 5 to 10 ft; Over 10 ft. Tap one.	None

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
How fast it grows `F.rate`	Filters by growth speed.	Options: Slow; Medium; Fast. Tap one.	None
Light `F.sun`	Filters by the light a plant likes.	Options: Full sun; Part shade; Shade. Tap any.	None
Flower color `F.color`	Filters by flower color family.	Options: White; Yellow; Orange; Red; Pink; Purple; Blue; Green. Tap any.	None
Blooms in `F.month`	Keeps plants that bloom in the chosen months.	Options: Jan; Feb; Mar; Apr; May; Jun; Jul; Aug; Sep; Oct; Nov; Dec. Tap any.	None
Fall color `F.fallc`	Filters by autumn leaf color.	Options: Red & burgundy; Orange & copper; Yellow & gold. Tap any.	None
Leaf color `F.leaf`	Filters by leaf color.	Options: Green; Deep green; Gold & lime; Blue & silver; Burgundy & copper; Variegated. Tap any.	None
Texture `F.tex`	Filters by look and feel.	Options: Fine & feathery; Big bold leaves; Soft & fuzzy. Tap any.	None
Winter and extra interest `F.interest`	Filters for plants with something to see.	Options: Berries; Colorful or peeling bark; Plumes & seed heads; Good in winter. Tap any.	None
Good to know `F.needs`	Keeps native or deer-resistant plants.	Options: Native; Deer-resistant. Tap any.	None

Hardiness zone

Information only. A zone never hides a plant by itself.

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
My zone `F.zone`	Tells the tiles how a plant is likely to do where you live: Likely to thrive here, Borderline here, Tender here, May be too warm.	Options: Not set; Zone 1 to Zone 13. Pick your zone.	Not set (remembered on this device once set)
Find my hardiness zone	Opens the helper described below.	Tap.	n/a
Likely to thrive here `F.thrive`	Keeps only plants rated for your zone.	Tap.	Off
Pet safe `F.pet`	Keeps only plants confirmed safe for pets.	Tap.	Off

Find my hardiness zone window

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
ZIP code (U.S.)	The ZIP code to look up your zone online.	Options: 5 digits. Type 06032. The lookup contacts a public zone service; if it fails you are told to use the winter choices.	Empty
Look it up	Looks up the zone for the ZIP code and sets it.	Tap after typing five digits.	n/a
Winter choices	Sets a zone from how cold your winters get.	Options: Mild: it almost never freezes; Light freezes, rarely below 15 °F; Cold snaps near 5 °F; Cold, around −5 °F; Very cold, around −15 °F; Bitter, around −25 °F; Arctic, below −35 °F. Tap the one closest to your winters.	None
I already know it...	Sets the zone directly.	Options: Zone 1 to Zone 13. Pick your zone.	I already know it...

Buttons at the bottom of Filters and more tools

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Add my own item	Opens the Add my own item window (add from a photo).	Tap.	n/a
Plant ID	Opens Plant ID (see the same article).	Tap.	n/a

Steps

1. Tap **Add**, then **Plants & things**.
2. Type in the **Search** box, or tap a **category chip**.
3. Open **Filters and more tools**.
4. Tap a **Start with a goal** chip such as Privacy screen, or open a group such as **Light** and tap choices.
5. Check the counts on the chips before you tap them. A grey chip means zero plants.
6. Set **My zone** (or press **Find my hardiness zone**) to see thrive/borderline/tender labels.
7. Pick a **Sort** order.
8. Tap a plant tile, then tap the photo to place it (place a plant). Hold Shift on a computer to place several.

Tips

- Combine one goal with one or two groups. Too many filters can leave an empty list; use Clear N filters.

If something goes wrong

- **No matches.** Try fewer filters or a simpler word like "red", "shade" or "native".
- **The ZIP lookup fails.** Use the winter buttons or pick your zone from the list.
- **Pet safe is missing.** It only shows when the library has pet data.

Designer: Add my own item and Plant ID fields

Every control for turning a photo into a library item: cut-out tools, naming, linking to a library plant, size, and Plant ID.

You find these in the Designer: **Add → Plants & things → Filters and more tools**, then **Add my own item** (photograph it, or cut it out of a photo you already have) or **Plant ID**. They also open from the home screen. Items are saved in **My Library** in your account (or on this device if you are not signed in). Finding things by name and Plant ID ask you to sign in (free).

The Add my own item window has three steps (photo, cut-out, details). Background: add your own item from a photo and Plant ID.

Before you start

- A clear photo: step back so the whole thing fits, shoot from the side at about waist height, plain background if you can.
- Check your storage if you are signed in; saving uses account storage (storage packs).

Fields

Step 0: the first window

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Photograph it	Starts the camera path for a new item.	Tap.	n/a
Cut it out of a photo	Starts the path for pulling one thing out of a photo you already have.	Tap.	n/a

Step 1: the photo

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Take a photo	Takes a new picture with your camera.	Options: Image files. Tap and allow the camera.	n/a
Choose a photo	Picks a picture from your device.	Options: Image files. Tap and choose.	n/a
From my designs (cut-out path only)	Lists photos from your saved designs to cut from.	Tap and pick one.	n/a

Step 2: the cut-out

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Find it by name (free) — What do you want to pull out?	The AI outlines the named thing and marks it as selected. Needs sign-in and the finder switched on.	Options: At least 3 characters. Type "the Japanese maple" or "the stone bench" and press Enter.	Empty
Find it	Runs the name search.	Tap.	n/a
Keep / Remove / Box / Ground `tool`	Keep: brush over parts cut off. Remove: brush over background still showing. Box: drag a tight box around the subject. Ground: drag to where it meets the ground; everything below is removed.	Options: Keep; Remove; Box; Ground. Tap a tool and drag on the picture.	Keep (Box on the cut-out path)
Brush size `brush`	Width of the Keep and Remove brushes.	Options: 4 to 40. Drag.	14
Preview on checkerboard `showCut`	Shows the cut-out on a checkerboard so you can see the edges.	Tick to check the cut.	Unchecked
Undo / Start over / New photo	Undo steps back (30 steps). Start over clears your brush work. New photo goes back to step 1.	Tap.	n/a
Looks good →	Goes to details. Blocked with a message if nothing is selected.	Tap.	n/a

Step 3: details

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
What kind of thing is it? `state.cat`	Sets the category the item lives in and its starting size.	Options: Trees; Evergreens; Shrubs; Perennials; Grasses; Annuals; Vines; Features. Tap the right kind.	A guess from the picture
What is it? (search box with microphone)	Searches the library so you can link your photo to a real plant (or feature).	Type "hydrangea" and pick a match from the list.	Empty
Library matches `state.base`	Linking a plant makes your photo grow, bloom and change color using that plant's real data. A feature match sets the group and height instead.	Tap one.	Suggestions from the photo
Unlink	Removes the link to the library plant.	Tap.	n/a
Name in your library `state.name`	The name shown in My Library. If left empty and a plant is linked, the plant name is used; otherwise you are asked to type one.	Options: Up to 60 characters; required. Type "Mom's blue hydrangea".	Empty (or the linked plant name)
Grow it over time like a real `state.fixed`	Lets the item follow the plant's growth on the See it grow slider. Unticked makes the size	Untick for a fixed-size item.	Checked

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
	fixed.		
How tall is it? `state.h`	The real height of the thing in the photo.	Options: 0.5 ft up to 90 (trees), 80 (evergreens), 20 (features), 15 (everything else), step 0.5. Drag to the real height.	By category: trees 20, evergreens 12, shrubs 4, perennials 2, grasses 3, annuals 1.2, vines 8, features 3 ft
The photo shows flowers (we'll hide them out of season) `state.bloom`	Hides the flowers when the season is not a blooming one.	Untick if no flowers show.	Checked if the picture looks flowery
Group `state.group`	Where the item appears in the Features category.	Options: Stone; Seating; Fire; Water; Lighting; Planters; Structures; Fences & Walls; Decor; Outdoor Living; My photos. Pick one.	A guess (Stone, Planters or Decor) or My photos
Save to My Library / Save changes	Saves the item, then (for a new one) lets you place it on the photo.	Tap. If the name is empty a message asks you to type one.	n/a
Redo cut-out (editing only)	Goes back to the cut-out step with the original photo, if it was kept.	Tap.	n/a
Download for website (editing; site owner only)	Downloads the cut-out so the site owner can upload it under WordPress → Settings → VisionScaper → Library photos.	Tap (owner only).	n/a
Delete (editing)	Deletes the item from My Library and from any design that uses it, after a confirmation.	Tap and confirm.	n/a

Plant ID

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Part chips `part`	Tells the identifier which part you will photograph.	Options: Whole plant; Leaf; Flower; Fruit / berry; Bark. Tap one.	Whole plant
Take a photo / Upload a photo	Starts the identification (free; needs sign-in and Plant ID switched on).	Tap.	n/a
Add to My Library / No thanks / Get more storage	Saves the identified plant cut-out with growth data, skips it, or opens storage if you are full.	Choose.	n/a
Place it in my design / Full plant facts / Identify another	Places the new plant, opens its fact sheet, or restarts.	Tap.	n/a

Steps

1. Tap **Add my own item** (Add → Plants & things → Filters and more tools).
2. Choose **Photograph it** or **Cut it out of a photo**, then **Take a photo**, **Choose a photo** or **From my designs**.
3. On the cut-out screen, use **Box** to drag around the subject, then **Keep** and **Remove** to touch up edges. Tick **Preview on checkerboard** to check.
4. Press **Looks good →**.
5. Choose **What kind of thing is it?**, then search **What is it?** and tap a match to link to a plant.
6. Type **Name in your library**.
7. Set **How tall is it?** if the item is not linked or you turned growing off, and tick or untick the flowers box.
8. Press **Save to My Library**. Then tap the photo to place the new item.

Tips

- Linking to a real plant is worth the extra tap: it then grows, blooms and changes with the seasons.

If something goes wrong

- **"Nothing is selected yet".** Brush over the subject with Keep or draw a Box first.
- **Find it says it is not switched on.** Drag a box around the thing instead.
- **I cannot save.** Your browser storage or account storage may be full; delete old items or get more storage.

Designer: Remove it, Pick the spot and fill controls

Every control in the Remove it and Pick the spot tabs: guided removal buttons, weed finder, selection tools, refine, save and fill.

You find these in the Designer under **Erase & fill** in the tool bar. It has two tabs: **Pick the spot** and **Remove it**. Anyone can use them. Finding things by name needs a free sign-in and the AI finder being switched on for the site.

Pick the spot highlights part of the photo. **Remove it** takes the highlighted part out, or covers it with mulch, lawn or stone. Background: remove something and magic erase, pick the spot and clear an area.

Before you start

- Open a design that has a photo.

Fields

Both tabs: guided buttons at the top

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Clear an area (weeds, plants, clutter)	Starts a step-by-step window for clearing an area.	Tap and follow the steps.	n/a
Remove a plant	Starts the same window set up for taking out a plant.	Tap and follow the steps.	n/a
Remove something else	Starts the window with whatever is highlighted right now.	Highlight first if you can, then tap.	n/a

Remove it tab

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Remove it	Takes the highlighted part out of the photo. Undo works.	Tap the thing in the photo (Shift-tap adds more), then press it.	Greyed out until something is highlighted
Weed level `opts.eraser.weedLevel`	How much green the weed finder will treat as a weed.	Options: Only obvious; Most weeds; Everything green. Pick before pressing Find weeds.	Most weeds
Find weeds	Looks inside the bed you tapped and highlights weed patches. Plants you added are never touched.	First tap the mulch or soil of the bed.	n/a
Select by `opts.eraser.mode`	Just this grows the highlight from where you tap through similar colors. Everything like this finds every spot with a matching color, shape and size.	Options: Just this; Everything like this. Pick, then tap the photo.	Just this
Color match `opts.eraser.tol`	How different a color may be and still count as the same.	Options: 4 to 80, step 1 (Strict under 20, Medium under 45, Loose above). Drag right if the highlight is too small.	30
Grow the edges `opts.eraser.grow`	Makes the highlight a little bigger all round so no edge is left behind.	Options: 0 to 12 px, step 1. Drag.	3 px
Fix the selection with a brush `opts.eraser.brush`	Paint on adds to the highlight, Paint off takes away.	Options: Tap; Paint on; Paint off. Pick, then paint on the photo.	Tap
Brush size `opts.eraser.size`	Width of the Paint on / Paint off brush.	Options: 6 to 160 px, step 2. Drag.	30 px
Clear selection	Removes the highlight.	Tap.	n/a
Flip it	Swaps highlighted and not highlighted.	Tap.	n/a
Grow / Shrink	Makes the highlight 4 px bigger or smaller.	Tap.	n/a
Let AI find it	Opens Design with AI to find the thing for you.	Tap.	Greyed out when AI selection is off
Soften the edge `opts.eraser.feather`	How soft the edge is when you cover the highlight with a material.	Options: 0 to 16 px, step 1. Drag.	2 px
Cover it with mulch, lawn or stone: material swatches	Covers the highlighted area with that material straight away. Undo works. If nothing is highlighted you are told to select first.	Options: Materials from the library. Tap a swatch.	None

Pick the spot tab: choosing how to select

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
How to select (three main choices) `sx.mode`	Curved: tap around it, outline curves. Straight: tap each corner (Shift keeps 45 degrees). Rectangle: drag across it.	Options: Curved edges; Straight edges; Rectangle. Tap a choice, then work on the photo. Keys 1 to 9 also switch.	Curved edges
More ways to select `sx.mode`	Object: click it or drag a rough box. Same color: picks similar colors. Snap to edge and Hug the edge follow nearby edges. Oval: drag an oval. Touch-up brush: paint exact pixels (Alt removes).	Options: Object; Same color; Snap to edge; Hug the edge; Oval; Touch-up brush. Open the list and pick one.	Closed unless one of them is in use

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Select by name (or type it: shrubs, weeds, lawn, mulch, patio)	Asks the AI to find what you name. Needs sign-in and the finder switched on; otherwise you are told to outline it instead.	Options: Any words. Type "the old shrubs" and press Enter or Find.	Empty
Find	Runs the name search.	Tap.	n/a
Combine with the current selection `sx.combo`	Decides how a new selection joins the old one. Only the overlap shows once chosen with the keyboard (Shift+Alt).	Options: Start over; + Add to; - Take away; Only the overlap. Pick before selecting.	Start over
Use it (Enter) / Discard (Esc)	Accepts or throws away the blue dashed proposal.	Tap.	n/a
Finish (Enter) / Last point	Closes the outline, or removes the last point.	Tap.	n/a
Fine-tune the outline: Looks right / Cancel / Remove point / Undo	Apply the dragged dots, cancel, delete a selected dot (needs more than 3 dots), or undo a dot move.	Drag white dots; tap teal + to add one.	n/a

Pick the spot tab: options shown for the chosen way

Only the controls for the way you chose are shown.

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Brush size [ ] `sx.opt.brush`	Brush width (touch-up brush; Smart and Paint it are hidden modes).	Options: 4 to 300 px, step 1. Drag or use [and] keys.	24 px
Hardness `sx.opt.hardness`	Soft or hard brush edge.	Options: 0 to 100 %, step 5. Drag.	100 %
Color match `sx.opt.tol`	How similar colors must be.	Options: 4 to 90, step 1. Drag.	32
Only touching areas (Shift-click for everywhere) `sx.opt.contiguous`	On: only areas joined to where you clicked. Off: the whole photo.	Untick to pick everywhere.	Checked
Edge search width `sx.opt.edgeRadius`	How far from your line the edge is searched for.	Options: 3 to 40 px, step 1. Drag.	10 px
Auto points `sx.opt.anchorEvery`	How often points are placed along the edge by themselves.	Options: 1 to 5 (Few, Fewer, Normal, More, Most). Drag.	3 (Normal)
Edge contrast `sx.opt.sensitivity`	How strong an edge must be to snap to.	Options: 0.1 to 1, step 0.05 (Strong edges only, Normal, Faint). Drag.	0.6
Preview before applying `sx.opt.preview`	Shows a blue dashed proposal you accept or discard.	Tick.	Unchecked
Soften new selections `sx.opt.feather`	Feathers every new selection edge.	Options: 0 to 30 px, step 1 (0 shows Off). Drag.	Off
All / Invert / Deselect	Select everything, swap selected and not, or clear (Deselect is greyed out with nothing selected).	Tap.	n/a

Pick the spot tab: Refine (shown when something is highlighted)

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Refine edge automatically	Tidies the edge of the highlight.	Tap.	n/a
Grow / Shrink / Expand 4px / Contract 4px / Smooth / Feather 6px	Each changes the shape of the highlight as named.	Tap.	n/a
Fill holes	Fills small holes and removes stray specks.	Tap.	n/a
Edit points	Turns the outline into dots you can drag.	Tap.	n/a
Similar, touching / Similar, everywhere	Adds spots like the highlighted one, only nearby or everywhere.	Tap.	n/a
Feather follows edges (soft on foliage, crisp on hardscape) `sx.opt.adaptiveFeather`	Lets the soft edge adapt to what it meets.	Untick for even softness.	Checked

Pick the spot tab: Use the selection as…

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Lawn area / Planting bed / Patio / Outline zone	Turns the highlight into that kind of shape you can edit.	Tap.	n/a
Measure it	Turns the highlight into a measurement.	Tap.	n/a
Remove it	Removes the highlighted part.	Tap.	n/a
Edit with AI	Opens Design with AI working on the highlight.	Tap.	n/a
Copy cut-out	Copies the highlighted part as a PNG, or downloads it if copying is not allowed.	Tap, then paste.	n/a
Fill with a material (disclosure)	Fills the highlight with the chosen material.	Open and tap a swatch.	Closed

Pick the spot tab: Saved selections and View & shortcuts

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Save this selection...	Saves the highlight for this view under a name.	Options: Any text. Type "front lawn", press OK.	Selection N
Load / + / - / trash (per saved selection)	Load replaces, + adds, - subtracts, trash deletes.	Tap.	n/a
View mode `sx.opt.view`	How the highlight is drawn.	Options: Tint; Mask; Only; Outside; Ants. Pick one.	Tint
Highlight color `sx.opt.color`	Color of the highlight.	Pick.	#ff3d8b
Highlight strength `sx.opt.opacity`	See-through level of the highlight.	Options: 10 to 90 %, step 5. Drag.	35 %
Marching ants `sx.opt.ants`	Moving dashed line around the highlight.	Untick to hide.	Checked
Show uncertain edges (red = check here) `sx.opt.confidence`	Marks edges the tool is unsure about in red.	Tick.	Unchecked

Steps

1. Tap **Erase & fill**, then the **Pick the spot** tab.
2. Choose **Curved edges**, **Straight edges** or **Rectangle**, and outline the thing in the photo. Or type a name in the box and press **Find**.
3. Fix the edge with **Refine** or **Edit points**.
4. Choose what to do: **Use the selection as...**, or go to **Remove it** and press **Remove it**.
5. To cover it instead, set **Soften the edge** and tap a material swatch.
6. Check the result. Undo if it is not right (see undo, redo and history).

Tips

- Use Pick the spot for careful outlines and Remove it for quick taps.
- Save selections you will use again.

If something goes wrong

- **Find weeds says to tap the bed first.** Tap the mulch or soil of the bed, then try again.
- **Select by name says it is not switched on.** Outline it instead.
- **Nothing happened when I pressed Remove it.** The button is greyed out until something is highlighted.

Settings → VisionScaper: Library packs, photos and recent purchases

Install photo packs, upload library photos and read the recent purchases table.

Open the WordPress dashboard and go to **Settings → VisionScaper**. Only users who can manage options (administrators) see this page. Below the main form are tools that are not saved options: Library packs, Library photos and Recent purchases.

Before you start

- A .zip or .tar pack, or photos named by library ID.

Fields

Control (exact label)	What it does for VisionScaper	What to enter	Default / notes
Choose file (pack) (`ds_pack`)	One .zip or .tar/.tgz/.gz pack of plant/feature photos and ground materials.	Click it and pick a .zip or .tar file from your computer. If WordPress says it is too large, ask your host to raise the limit to 64 MB, or copy files by FTP into wp-content/uploads/dreamscaper-photos.	file
Install pack (`submit`)	Uploads and installs the pack, then rebuilds the photo list.	Press after choosing a file. A green notice reports how many photos and materials were added. Clear any page-cache plugin once.	submit button
Choose files (photos) (`ds_photos[]`)	One or more transparent WebP/PNG/JPG photos, under 3 MB each.	Pick one or more files named by library ID, e.g. hydrangea.webp, with optional hydrangea.fall.webp or hydrangea.winter.webp. Transparent WebP or PNG under 3 MB.	file (multiple)
Upload photos (`submit`)	Uploads the photos and also deletes any ticked photos.	Press after choosing files and/or ticking photos to delete. Files that fail the name or size rules are listed as skipped.	submit button
Rebuild photo list (`ds_rebuild`)	Rebuilds manifest after FTP copying (the same save runs).	Press once after copying photos in by FTP.	submit button
Find a photo, e.g. maple (`ds-pq`)	Filters the thumbnail grid by file name.	Type part of a file name, e.g. maple.	search text
Find (`(none)`)	Reloads the page with the search.	Press after typing a search.	button
Page numbers (`ds_ppage`)	Moves through the grid, 120 per page.	Click a number to move through the photos.	links
Delete tick box under each thumbnail (`ds_delete[]`)	Ticks a file to delete when you press Upload photos.	Tick the photos to remove, then press Upload photos.	checkbox (repeated)
Recent purchases table (read only) (`(none)`)	Last 30 purchases: Date, Customer, Email, Bought, Paid.	Nothing to enter. It appears only once at least one user has a purchase on record.	table

Steps

1. Under **Library packs**, choose a file and press **Install pack**.
2. Under **Library photos**, choose files and press **Upload photos**.
3. Press **Rebuild photo list** after FTP copying.
4. Search with **Find**; tick photos to delete.

Tips

- Photos must be under 3 MB.

If something goes wrong

- Upload too large: ask your host to raise the limit.

Designer: Design with AI controls

Every control in Design with AI: the request box, microphone, idea chips, keep-the-same chips, Guided wizard, review buttons and result buttons.

You find this in the Designer: tap **Ask AI** in the tool bar. The panel heading is "Design with AI". You must be signed in (free), and the site owner must have switched AI on; otherwise the box is greyed out and a sign-in or "being set up" note shows.

You describe a change in plain words. VisionScaper shows a plan first, for free, and then asks you to confirm. Some plans use AI credits. The number of free credits per day and the cost of each action come from the site (placeholder, not approved); the credits pill in the panel shows what you have. Background: design with AI.

Before you start

- Sign in (accounts and sign-in).

Fields

Panel header

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Guided `S.guided`	Switches between the step-by-step wizard and the single request box. Turning it on or off clears the current plan.	Tap to switch.	On for first-time users, then your last choice
Credits pill	Shows your AI credits. (effect not verified in code) for the exact wording.	Look; buy more from the pill if offered.	n/a
Sign in (shown when locked)	Opens sign-in.	Tap.	n/a

Plain request screen

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Tell VisionScaper what to change `S.text`	Your request. At least 4 characters. Enter sends it; Shift+Enter adds a new line.	Type "add a flower bed along the fence".	Empty
Say it instead (microphone)	Fills the box with your voice. Browser dependent.	Tap, allow microphone, speak.	Off
Show me the plan	Works out a plan (free). If the plan costs no credits and no confirmation is needed it runs straight away.	Tap after typing.	n/a
Ideas chips	Tapping a chip puts its words in the box and sends it.	Options: Suggestions that depend on whether you have a selection and whether it is a bird’s-eye view. Tap one.	n/a
Keep these the same `S.keep`	Tells the AI what not to touch.	Options: house; driveway; camera angle; plants I placed; fence. Tap Change, toggle the ones to keep, tap Done.	A starting set; Change opens the list

Review and result

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Do it (N credits) / Do it	Runs the plan. If you do not have enough credits, a message offers to buy more.	Tap.	n/a
Change it	Goes back to the request box.	Tap.	n/a
Question chips	When the AI asks a question, tapping an option answers it.	Tap.	n/a
Accept	Keeps the result and clears the panel for the next change.	Tap.	n/a
Try again	Takes the result back and shows the plan again.	Tap.	n/a
Undo	Undoes everything this request did.	Tap.	Greyed out when nothing to undo

Guided wizard (when Guided is on)

Steps: What do you want to do? / Where? / Tell me more / What should stay the same? / Check and go / Your result. A step counter and a Back link are shown.

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
What do you want to do? `w.goal`	Remove something opens the guided removal window instead. See it skips the Where? step.	Options: Redesign my yard; Change one thing; Remove something; See it realistic or another time. Tap one.	None
Whole yard / Use the area I selected `w.where`	Chooses whether the change applies to the whole picture or a highlighted area. If nothing is highlighted, the second button sends you to Pick the spot.	Tap one.	None
Tell me more `w.detail`	Your details, added to your goal to form the request.	Type "a flower bed along the fence", or tap an idea chip.	Empty
Next	Goes to the next step.	Tap.	n/a

Earlier AI results window

Opens for a saved AI picture. It spends no credits.

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Compare knob (Before / After)	Reveals the before and after photo.	Options: 0 to 100. Drag or tap the picture.	50
Version thumbnails	Switch between versions of the result.	Tap.	Latest

Steps

1. Sign in, then tap **Ask AI**.
2. Type your request in the box (or use the microphone) and press **Show me the plan**.
3. Read "Here’s what I understood" and the steps. Check the cost line.
4. Tap **Do it**, or **Change it** to start again.
5. Look at the result. Tap **Accept**, **Try again** or **Undo**.
6. To be walked through, turn **Guided** on and answer the six steps.

Tips

- Use **Keep these the same** when you do not want the house or fence changed.
- Select an area first for a small change.

If something goes wrong

- **The box is greyed out.** Sign in, or AI is not switched on for this site.
- **"Tell me a little more".** A request must be at least 4 characters.
- **"You need N AI credits".** Buy more or wait for the free daily credits. The numbers are set by the site owner.

Designer: Layers, saved versions, My designs and tags

Every control for the Layers window, saved versions with approval, design and view names, and the My designs page with tags.

Layers opens from the layers button at the top of the Designer. **Design name** sits at the top of the editor. **My designs** (house icon, or "My designs" on Home) lists every saved design. Saved versions live in the history window; they need you to be signed in. Background: save, autosave and cloud designs.

Fields

Design name and view names

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Design name `project.name`	Names the design. It saves by itself as you type and is used in My designs and on prints.	Options: Up to 60 characters. Click the name at the top and type.	The name given when you started
Name this view (double-click a view tab)	Renames that view.	Options: Any text. Double-click the tab, type, press OK.	The current view name

Layers window

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
+ Add a layer	Adds a layer on top. New things go on the active layer.	Options: Any text. Tap, name it, press OK.	Layer N
Draw on (round marker)	Makes that layer active so new items go there.	Tap.	The top layer
Hide / Show (eye)	Hides or shows everything on that layer.	Tap.	Shown
Lock / Unlock	Locked layers cannot be changed.	Tap.	Unlocked
Rename	Renames the layer.	Type and OK.	Current name
Move layer up / down	Changes the layer order.	Tap.	n/a
Delete layer	Deletes the layer. Its items move to the layer below; nothing is deleted.	Tap and confirm.	n/a
Layer for (drop-down on each item)	Moves that item to another layer.	Options: All layers. Pick.	Current layer
Hold for original	Shows the original photo while held.	Hold.	n/a
Light & color adjustments: Remove	Clears all Adjust changes.	Tap.	n/a
Ground shapes: eye, name, lock, rename, up, down, duplicate, remove	Hide, select, lock, rename (max 40 characters), reorder, copy or delete a bed, patio or painted area.	Tap.	n/a
Plants and features rows	The same hide, lock and layer controls for placed items. (effect not verified in code) for every row control beyond the ones above.	Use as needed.	n/a

Saved versions (history window)

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Name this version (optional)	The label for a version stored in your account.	Options: Up to 100 characters. Type "Option A".	Empty (saved as "Saved version")
Save a version to my account	Uploads the design and stores a numbered version. Needs sign-in. If nothing changed you are told so.	Tap.	n/a
Approve this design for the customer	Marks the latest version as approved. (effect not verified in code) for what the customer sees.	Tap.	n/a
Restore / Approve / Remove approval	Restore returns to that version; Approve marks it; Remove approval clears it.	Tap.	n/a

My designs page

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Search by name or tag…	Shows designs whose name or tags contain every word you type.	Type "pool".	Empty
Sort `ds_browser_v1.sort`	Orders the designs.	Options: Recently edited; Newest first; Oldest first; Name A–Z. Pick.	Recently edited (remembered on this device)
Show	Filters the list.	Options: All designs; Favorites; Not tagged yet; Only in my account (when signed in and some exist). Tap.	All designs
Tags	Shows only designs with every selected tag.	Options: Yard designs; Bed designs; Paver designs; My Home designs; Front yard; Backyard; Ideas to try; plus	None selected

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
		My tags. Tap tags; tap again to clear.	
New tag / Rename or delete my tags	Creates, renames or deletes your own tags.	Tap and type.	n/a
New design	Starts a design (start a new design).	Tap.	n/a
Select	Turns on tick selection; then Select all / Deselect all, Tag, Favorite and Delete work on the ticked designs.	Tap.	Off
Card menu: Open, Tags..., Rename, Duplicate, Delete	Open it, edit its tags, rename it (max 60 characters), copy it (this device only) or delete it.	Open the menu on a card.	n/a
Star (favorite)	Marks the design as a favorite.	Tap.	Off
Tag editor: Create tag	Makes a tag and turns it on for the chosen designs. Ready-made tags can be toggled too.	Type and Enter.	Empty

Steps

1. Type a **Design name** at the top.
2. Open **Layers**. Press **+ Add a layer**, name it, and tap the round marker to make it active.
3. Use the eye and lock buttons to hide or protect a layer.
4. To keep a version, open the history window, type a name and press **Save a version to my account**.
5. Go to **My designs**. Use **Search**, **Sort** and the tag buttons to find a design.
6. Press **Select** to tag or delete several at once.

Tips

- Name layers for what they hold, such as "Existing" or "Phase 1".
- Only a locked layer is protected; hidden layers still exist.

If something goes wrong

- **Save a version says to sign in.** Versions are kept in your account.
- **A design is missing.** Check the Show setting and tags; use Clear filters.
- **Duplicate is missing.** It only appears for designs stored on this device.

Designer: Send my design, Share and consultation forms

Every field in the Send my design form, the Request a design consultation and Ask a question forms, and the Share window.

You find these in the Designer under the share and send buttons. The forms send your design picture and plant list to the business that runs the site. Anyone can send; if you are signed in, your name, email, phone and town are filled in for you. Background: print, share and send.

Before you start

- A design with at least one view.

Fields

Send your design to the business

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Name `name`	Who is sending.	Type your name.	Your account name
Email `email`	Where the business replies.	Options: Must look like name@example.com. Type your email.	Your account email
Phone `phone`	Number the business can call.	Options: At least 10 digits. Type 10 digits.	Your account phone
Town `town`	Helps the business know the area.	Type your town.	Your account town
Anything you'd like us to know? (optional) `message`	Extra note sent with the design.	Type a note.	Empty
Hidden spam trap `hp`	Left empty by people. Robots fill it, and the site can then ignore the message. (effect not verified in code) for exact handling.	Do not touch; it is not visible.	Empty
Send my design	Sends a picture, your details, the design name, view name and a text list of plants and ground materials. A message below shows what is missing or what went wrong.	Tap.	n/a

Request a design consultation / Ask a question

The window title is "Request a design consultation" or "Ask a question".

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Name / Email / Phone	Your contact details.	Check or type them.	Your account details
Best time	When to contact you.	Options: Any time; Weekday mornings; Weekday afternoons; Evenings; Weekends. Pick.	Any time
Where	How to meet.	Options: At my home; Phone call; Video call. Pick.	At my home
Message (consultation) / Question (question)	What you want to talk about.	Options: A question needs at least 3 characters. Type budget, timing or what matters most.	Empty
Request my consultation / Send my question	Sends it with the current view and plant list.	Tap.	n/a

Share your design window

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Before & after / Just the design	Chooses what picture is shared.	Tap.	Before & after
Share… (Instagram, Messages, Facebook & more)	Opens your phone’s share sheet with the picture.	Tap.	n/a
Network buttons	Opens that site with a link to your picture.	Options: Facebook; Pinterest; X; WhatsApp; Nextdoor; LinkedIn; Reddit; Email. Tap one.	n/a
Copy link	Makes a public link and copies it. If copying fails, the link is shown to copy by hand.	Tap.	n/a
Save for Instagram / TikTok	Downloads a large picture to post yourself.	Tap.	n/a

Print and download

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Download / Print	Download saves a JPG; Print makes a one-page sheet with picture, date, brand and plant list.	Tap.	n/a

Steps

1. Open the design you want to send and tap the send button.
2. Check **Name**, **Email** and **Phone**.
3. Add a **Town** and a note if you like.
4. Press **Send my design**. Wait for "Sent! We'll be in touch soon."
5. For a consultation, choose **Best time** and **Where**, add a message, then press **Request my consultation**.

Tips

- Use a phone number you answer; the business calls it.

If something goes wrong

- **"Please add your name, email and a 10-digit phone number."** One of the three is missing or wrong.
- **It did not send.** The error under the button says why; try again.
- **Nobody replied.** Replies depend on the business; the site has no delivery receipt shown here.

Designer: Sign in, create account and My Account fields

Every field in the sign-in and create-account window, the profile window, My Account tiles and the AI credits and storage windows.

You find these when you tap **Sign in** (top of the Designer or Home), when a tool says "Sign in to ...", or **My Account** from the account button. Anyone can open them. A free account saves designs online and unlocks the AI tools and Plant ID.

The same window creates a contractor account when it is opened from the Hub side; the differences are noted below.

Before you start

- For Google or Facebook sign-in buttons to appear, the site owner must have set them up (get Google sign-in keys, get Facebook login keys).

Fields

Window tabs and social buttons

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Create account / Sign in	Switches between creating an account and signing in.	Tap the tab you need.	Create account (Sign in when opened from a Sign in button)
Continue with Google	Opens a sign-in pop-up with Google; the window closes when it finishes.	Tap and follow the pop-up.	n/a
Continue with Facebook	Same, with Facebook.	Tap and follow the pop-up.	n/a

Create account

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Full name `name`	Your name on designs and messages.	Options: At least 2 characters. Type your name.	Empty
Email `email`	Your sign-in name and where password resets go.	Options: Valid email. Type your email.	Empty
Phone `phone`	Lets the business or contractor reach you.	Options: At least 10 digits. Type 10 digits.	Empty
Street address of the yard `address`	The property you design. Picking a suggestion also fills Town, State and ZIP.	Start typing and pick a suggestion.	Empty
Town `town`	Your town.	Type or let the address fill it.	Empty
State `state`	Your state.	Options: State...; then the U.S. states. Pick.	State...
ZIP `zip`	Your ZIP code.	Options: Up to 10 characters. Type or let the address fill it.	Empty
Password `password`	Your password.	Options: At least 8 characters. Choose 8 or more characters.	Empty
It's OK for the business to contact me about my design / It's OK for VisionScaper to email me about my account `contact`	Whether you agree to be contacted. The second wording is used for contractor sign-up.	Untick to opt out.	Checked
I agree to the Terms of Service `agree`	You must tick it. The link opens the site's terms.	Tick it.	Unchecked
Hidden spam trap `hp`	Left empty by people. (effect not verified in code)	Do not touch; not visible.	Empty
Create my free account / Create my contractor account	Creates the account and signs you in. Errors appear above the button.	Tap.	n/a

Sign in

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Email / Password `email`, `password`	Signs you in.	Type both.	Empty
Forgot password?	Sends a reset message to the email typed above. If it is empty or not an email you are told to type it first.	Type your email, then tap.	n/a
Sign in	Signs you in.	Tap.	n/a

A couple more details / My details window

Opens after social sign-in when details are missing, and from My Account → My details.

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Full name / Email / Phone `name, email, phone`	Updates your profile.	Options: Valid email; 10-digit phone. Edit.	Your current details
Street address of the yard `address`	Updates the property.	Edit.	Your current address
Town / State / ZIP `town, state, zip`	Updates the address parts.	Edit.	Your current details
Contact checkbox `contact`	Same meaning as above.	Tick or untick.	Your last choice (checked for new)
Save	Saves, shows "Saved!".	Tap.	n/a

My Account window

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
AI credits tile	Opens the AI credits window.	Tap.	Shown only when AI is on
Storage tile	Opens the storage window.	Tap.	Shown when storage is tracked
My details	Opens the details window above.	Tap.	n/a
Look & layout	Opens appearance settings. These settings are not inventoried here.	Tap.	Shown when the page offers it
Tours & tips	Lets you turn guided tours back on.	Tap.	Shown when the page offers it
Sign out	Signs you out. Designs stay saved in your account.	Tap.	n/a
Delete account	Deletes your account and every design saved online after you confirm. Designs saved on this device stay. Cannot be undone.	Tap and confirm only if sure.	n/a

AI credits and storage windows

The packs, prices, daily free credits and storage sizes come from the site and are placeholders until the owner approves them.

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Credit packs	Each opens secure checkout for that pack.	Options: Set by the site. Tap a pack.	n/a
Number of credits	Chooses how many credits to buy.	Options: Minimum and maximum set by the site. Type or step it.	10 or the minimum
Buy	Opens secure checkout.	Tap.	n/a
Use 1 credit (confirm window)	Confirms a one-credit action. (effect not verified in code) for the checkbox wording.	Tap to confirm.	n/a
Storage packs	Opens checkout to add storage. (effect not verified in code) beyond that.	Options: Set by the site. Tap.	n/a

Steps

1. Tap **Sign in** and choose **Create account**.
2. Fill in **Full name**, **Email**, **Phone**, the yard address and **Password**.
3. Tick **I agree to the Terms of Service**.
4. Press **Create my free account**. Fix any message shown above the button.
5. Later, open **My Account → My details** to change anything.
6. If you forget your password, choose **Sign in**, type your email and tap **Forgot password?**.

Tips

- Use a phone number you answer.
- Social sign-in may ask for missing phone and address afterwards.

If something goes wrong

- **"Please add a 10-digit phone number."** The phone needs at least 10 digits.
- **No Google or Facebook buttons.** The owner has not turned them on.
- **I deleted my account by mistake.** It cannot be undone.

Request quotes: every question in the wizard

Every screen and field of the Request quotes wizard, from who gets it to review and send.

You find this by tapping **Request quotes →** on the bar that appears after you add contractors, or from the front door. You must be signed in. One brief goes to every contractor you choose. It saves a draft to your account as you go, and **Save and finish later** lets you leave.

The short path has 7 steps. **Add more detail** brings back four more (the site, details, priorities and design steps). The Request quotes form shows a completeness meter (placeholder scoring, not approved). Background: request quotes.

Before you start

- Sign in (accounts and sign-in).
- Add at least one contractor, or add them later in step 1.

Fields

Basket (before the wizard)

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
+ Add to my request / In my request	Puts the contractor in your request.	Tap.	Not added
Clear	Empties the basket.	Tap.	n/a
Request quotes →	Opens the wizard.	Tap.	n/a

Wizard controls on every step

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Step dots	Jump to a step.	Tap.	n/a
Save and finish later	Saves the draft and closes.	Tap.	n/a
Add more detail / Fewer steps	Turns the longer path on or off.	Tap.	Fewer steps
← Back / Skip / Next →	Move between steps. Some Next buttons show a message if a required answer is missing.	Tap.	n/a

Step: Who should get your request?

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Contractor list	Shows each chosen contractor; each row can be removed.	Review.	Your basket
Add more contractors	Saves and opens Find a Contractor.	Tap.	n/a

Step: What do you want done?

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Services `brief.services`	The kinds of work you want. Each pick adds questions in the Details step.	Options: Landscape design; Planting; Mulch & stone; Lawn installation; Patios & walkways; Retaining walls; Landscape lighting; Fencing; Drainage & grading; Tree work; Lawn care; Irrigation. Tap all that apply. At least one service or text in the next box is required.	None
Something else? Describe it `brief.other`	Extra service not in the list.	Type it.	Empty

Step: Tell us about it in your own words

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Description `brief.description`	Your project in your own words.	Options: At least 40 characters counts as complete. Describe what bugs you and what you picture.	Empty
Talk instead of typing (microphone)	Adds spoken words to the box.	Tap and speak.	n/a
Tidy it up	Asks the AI to rewrite your description. A window lets you choose Use this version or Keep mine.	Tap.	n/a

Step: Your property

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Take the property photos / Add or retake photos	Opens the guided property photos (below).	Tap.	n/a

Step: Attach a design (optional, longer path)

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Choose one of my designs / Choose a different design	Saves, then lets you pick a saved design to attach.	Tap.	n/a
Remove design	Detaches it.	Tap.	n/a

Step: Budget and timing

The budget choices are ranges for your own budget; they are not prices set by VisionScaper.

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Budget `brief.budget`	Tells contractors what range fits.	Options: Under $2,500; $2,500 – $5,000; $5,000 – $10,000; $10,000 – $25,000; $25,000 – $50,000; $50,000+; Not sure — tell me what's realistic. Tap one.	None
I'd like to hear about financing `brief.financing`	Says you want financing information.	Tick.	Unchecked
When `brief.timing.start`	When you want to start.	Options: As soon as possible; Within a month; This season; Next season; Just getting ideas. Tap one.	None
Must be done by (optional) `brief.timing.deadline`	A deadline.	Pick a date.	Empty
Why that date? `brief.timing.reason`	The reason for the deadline.	Type "graduation party".	Empty
How flexible are you? `brief.timing.flexible`	How firm the timing is.	Options: Very flexible; Somewhat; Not flexible. Tap one.	None

Step: About the site (longer path)

These questions come from the server; their text is not in this page of code.

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Site questions `brief.site`	Access, slope, utilities and similar answers that change a price. "Not sure" is allowed.	Options: Set by the server. Answer what you can. (effect not verified in code) for the exact list.	Empty

Step: A few details about the work (longer path)

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Questions per service `brief.answers`	Extra questions for each service you picked.	Options: Set by the server. Answer. (effect not verified in code) for the list.	Empty
also asks `brief.pro_answers`	Questions a chosen contractor added.	Options: Set by each contractor. Answer.	Empty

Step: What matters most? (longer path)

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Priority chips `brief.priorities`	Your must-haves and nice-to-haves.	Options: Stay within budget; Low maintenance; Deer resistant; Privacy; Color all season; Curb appeal; Fix drainage; Kid & pet friendly; Native plants; Finish by a date; Room to entertain. Tap.	None
Add your own and press Enter	Adds your own must-have.	Type and press Enter.	Empty

Step: How should contractors reach you?

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Mobile number * `brief.contact.phone`	The number contractors use.	Check it.	Your account phone
Best way to reach you `brief.contact.channel`	How you want contact.	Options: Text message; Phone call; Email; VisionScaper messages. Tap one.	None
Best times `brief.contact.times`	When to call.	Type "weekday evenings".	Empty
Who makes the decision? `brief.contact.deciders`	Who must be at a site visit.	Type "me and my spouse".	Empty

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Are you getting other quotes? `brief.contact.others`	Lets contractors know.	Options: Just this one; Yes, a few; Not sure yet. Tap.	None

Step: Review and send

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Summary rows (Edit)	Jump to the step to change an answer.	Tap.	n/a
Still missing list	Optional items; tapping jumps to that step.	Tap.	n/a
Share my name, phone, email, address, photos and this request... `consent`	You confirm contractors may see your details. Without it, the request will not send.	Tick.	Unchecked
Send to N contractor(s)	Sends the brief. Contractors that cannot take it are listed as "Not sent to". The result shows Go to Messages and My Projects.	Tap.	n/a

Steps

1. Add contractors with **+ Add to my request**, then press **Request quotes →**.
2. Choose services, describe the job and take the property photos.
3. Set your budget and timing.
4. Add contact details and press **Next**.
5. On **Review and send** check the summary, tick the consent box and press **Send**.
6. Open **Messages** or **My Projects** to follow replies.

Tips

- Use **Save and finish later** when you need photos you do not have yet.

If something goes wrong

- **"Add at least one contractor (step 1)".** The basket is empty.
- **"Tick the box to confirm..."** The consent box must be ticked.
- **Next says to pick a service.** Pick one or fill "Something else?".

Find a Local Contractor, property photos, reviews and homeowner screens

Every filter and input in Find a Local Contractor, the property photo steps, leave a review, messages, appointments and Ask for more work.

You find **Find a Local Contractor** from the front door or the Hub header. Messages, My Projects and calendar open from your account area. Anyone can search. Sending a request, messages and reviews need a free sign-in.

Before you start

- Sign in for messages, reviews and requests.

Fields

Find a Local Contractor

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Your town or ZIP `near`	Finds contractors that work near you and shows distance.	Type "Hartford" or a ZIP.	Empty (your last search is kept)
Business name (optional) `q`	Narrows the list by business name.	Type part of a name.	Empty
Sort `sort`	Orders the list. Best Dream-to-Reality ranks by how well past customers say finished yards matched their designs.	Options: Nearest; Top rated; Best Dream-to-Reality. Pick.	Nearest
Search	Runs the search.	Tap.	n/a
Service chips `service`	Shows contractors who offer that service. Searches again when tapped.	Options: Everything; Landscape design; Planting; Mulch & stone; Lawn installation; Patios & walkways; Retaining walls; Landscape lighting; Fencing; Drainage & grading; Tree work; Lawn care. Tap.	Everything
+ Add to my request	Adds the contractor to your request.	Tap.	Not added
Add all N who serve	Adds every listed contractor who serves your area.	Tap.	Hidden

Property photos (guided)

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Street address (Step 1) `address`	Creates the property record.	Type or pick.	Your account address and town
Create my property →	Saves the address and starts the photo steps.	Tap.	n/a
Seven views	Each has instructions on where to stand and a camera or upload button. Photos can be removed.	Options: Bird’s-eye view of your property; front of the house; left side; right side; backyard; important structures; existing landscaping. Follow each step.	None captured
Remove photo (x)	Deletes that photo.	Tap.	n/a

Leave a review

Shown on a finished, signed job.

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Overall `stars`	Your overall rating.	Options: 1 to 5. Tap a star.	5
Dream-to-Reality `reality`	How closely the finished yard matches your design.	Options: 1 to 5. Tap a star.	5
How was the work, the crew, communication and cleanup? `text`	Your written review.	Type.	Empty
Photo of the finished yard `photo`	Appears next to your design on their profile.	Take a photo.	None
Post review	Posts it. You may then be asked to share it on another review site; the site name comes from the contractor.	Tap.	n/a

Messages (homeowner)

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Filters	Shows that group of conversations.	Options: All; Unread; Contractors; Members; Projects; Archived. Tap.	All
Search messages `q`	Searches your conversations after a short pause.	Type.	Empty
Message	Your reply.	Type "Write a message…" and press Send.	Empty
Add a photo	Attaches a photo to your message.	Tap.	n/a
Send	Sends the message.	Tap.	n/a
Email me when someone sends me a message `email_messages`	Emails you about new messages, at most one per conversation every 15 minutes.	Tick or untick, press Save.	Checked unless you turned it off

Appointments (homeowner)

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Confirm	Tells the contractor you confirmed. (effect not verified in code) for the exact button wording.	Tap.	n/a
Ask for another time	Sends your preferred times to the contractor; your appointment stays until they change it.	Type "Any weekday after 3 pm" and press Send.	Empty note
Add to my calendar	Adds one appointment to your calendar.	Options: Google Calendar; Apple / Outlook (.ics file). Pick one.	n/a
Subscribe link (read-only box)	Add this to a calendar app to see every appointment. Anyone with the link sees the times.	Click to select, or press Copy link.	A private link

Ask for more work

Shown only when you already work with a contractor.

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Service check boxes	The services you want.	Options: The contractor’s services. Tick.	Unchecked
What would you like done? `notes`	Your request.	Type.	Empty
Best times (optional) `times`	When to reach you.	Type.	Empty
Send request	Sends it to the business.	Tap.	n/a
Referral link (read-only)	Share it to refer someone. Any reward text comes from the business.	Click to select.	A personal link

Steps

1. Open **Find a Local Contractor**. Type your town or ZIP and press **Search**.
2. Tap a **service chip** and change **Sort** if you like.
3. Tap **+ Add to my request** on contractors you like, or **Add all**.
4. Press **Request quotes →** (form fields).
5. After a finished job, open the job and press **Leave a review**.

Tips

- Add your town or ZIP, or the list cannot show distance.

If something goes wrong

- **"No contractors found yet in that area."** Try another town or Everything.
- **I cannot leave a review.** The button shows only on a signed, finished job.

Inspiration Board, Community Browser and post fields

Every control in the Inspiration Board, community feed filters, post and comment boxes, ratings, profile editing and message alerts.

Inspiration Board is a personal collection on Home. **Community Browser** is the public place for sharing designs and asking for ideas. Anyone can browse. Posting, commenting, rating and messaging need a free sign-in. Point costs and rewards are set by the site (placeholder, not approved).

Before you start

- Sign in to post, rate or comment.

Fields

Inspiration Board

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Take a photo / Upload	Adds a picture to your board.	Tap.	n/a
Plant	Saves a library plant. Typed words must all match; up to 40 matches shown.	Type and tap a plant.	Empty
Material	Saves a ground material.	Tap one.	n/a
Style	Saves a style.	Options: Traditional; Modern; Contemporary; Natural; Cottage; Formal; Rustic; Low-maintenance; Native; Pollinator; Luxury; Woodland; Coastal; Japanese. Tap one.	n/a
Find my style	Asks the AI to describe your style from your board. (effect not verified in code) for credit use.	Tap.	n/a
Apply this style to my yard	Starts Design with AI with your style words.	Tap.	n/a
Save my style	Saves the finding to your board.	Tap.	n/a
Add a note	A note on an item.	Type "love the gate".	Empty
Remove	Takes it off your board.	Tap and confirm.	n/a

Community Browser: feed

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Tabs	Chooses which feed.	Options: Discover; Following; Ask for ideas; Leaders; People. Tap.	Discover
Search designs, plants, tags… / Search questions… `q`	Filters the feed after a short pause.	Type.	Empty
Sort `sort`	Orders posts.	Options: Trending; Newest; Top rated; Most liked; Most discussed; Most viewed. Pick.	Trending (Newest on Ask for ideas)
When `range`	Limits by date.	Options: All time; This week; This month; This year. Pick.	All time
Rating (designs only) `min`	Minimum average rating.	Options: Any rating; 4★ and up; 4.5★ and up. Pick.	Any rating
Tag chips `tag`	Shows posts with that tag.	Options: All; Front yard; Backyard; Bed designs; Paver designs; Patio; Walkway; Low maintenance; Native plants; Pollinator garden; Shade garden; Privacy; Curb appeal; Modern; Cottage; Before & after; AI design; plus popular tags from the site. Tap; tap again to clear.	All
Show more	Loads more posts.	Tap.	n/a
Search members by name… (People tab)	Finds members; shorter text shows the most active members this month.	Options: At least 2 characters. Type.	Empty

Community Browser: a post

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Like	Likes the post. Sign-in needed.	Tap.	Off
Rate it (stars) `stars`	Rates the design.	Options: 1 to 5. Tap a star.	Your earlier rating
Comment / Give ideas	Scrolls to and focuses the comment box.	Tap.	n/a

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Say something nice or ask a question… / Share your ideas—plants, layout, tips… `body`	Your comment or idea. A reply keeps its parent.	Type and press Post. Empty with no picture shows "Write something first."	Empty
Add a design	Attaches one of your design pictures to the reply; Remove clears it.	Tap and pick.	n/a
Post	Posts the comment.	Tap.	n/a
Delete (post or comment)	Removes your own post or comment.	Tap and confirm.	n/a

Post composer (Share to VisionScaper Browser / Ask for ideas)

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Title `title`	The post title.	Options: Up to 100 characters; at least 3 letters. Type "Front walk makeover with hydrangeas".	The design name
Description (optional) / Your question `body`	Your story or question.	Options: Up to 3000 characters. Type.	Empty
Tags `tags`	Helps people find it.	Options: The tags listed above. Tap chips.	Any tags the design came with
Add your own tag…	Your own tag.	Options: Up to 30 characters; Enter adds. Type and press Enter.	Empty
My picture doesn’t show my house number, license plates, people’s faces or anything private. I’m happy for it to be public. `privacy`	Privacy check; the post will not send without it.	Tick.	Unchecked
Post to VisionScaper Browser / Ask the community	Publishes. Plants and features in your design are listed automatically.	Tap.	n/a

My profile

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Photo	Cropped to a square.	Options: Image. Tap and pick a picture.	Your current photo
Display name `handle`	Name shown on your posts.	Options: Up to 30 characters. Type.	Your community name
A line about you and your yard `bio`	Your short bio.	Options: Up to 300 characters. Type.	Your current bio
Name style `style`	How your name looks. Locked styles open with levels.	Options: Unlocked styles only. Tap one.	Your current style
Title under your name `title_id`	The title shown with your name.	Options: Your level plus earned titles. Pick.	Your level
Email me when… `notify`	Sets which community emails you get.	Options: someone sends me a message; someone comments on or replies to my posts; someone follows me or sends a friend request. Tick or untick.	Your current choices
Save profile	Saves everything on this screen.	Tap.	n/a
Trade (rewards)	Exchanges points for the reward shown. The points needed come from the site (placeholder, not approved).	Tap.	Greyed out if points are too low

Community messages

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Write a message…	A private message to a member. Disabled if blocked.	Type and press Send.	Empty

Steps

1. On Home, open **Inspiration Board**. Add photos, plants, materials and styles.
2. Press **Find my style** when you have a few items.
3. Open **Community Browser**. Use search, **Sort**, **When** and tags to find designs.
4. To share, open the share button in the Designer and choose the community. Fill in **Title**, tags and tick the privacy box.
5. Tap a post to rate it or comment.
6. Open **My profile** to set your display name, bio and email alerts, then press **Save profile**.

Tips

- Check your picture for house numbers and faces before posting.
- Use tags; they are how people find your post.

If something goes wrong

- **"Add a title (at least 3 letters)".** The title is too short.
- **"Please confirm the privacy check first."** Tick the privacy box.
- **Trade is locked.** You do not have enough points yet.

AI Quoter: every field and button

Field-by-field guide to the AI Quoter screen: customer, property, design, job description, draft review and saving a draft quote.

The AI Quoter turns a short description of a job into a first draft of the work and quantities. It then prices that draft from your own price book. Nothing is sent to the customer.

Where to find it: Contractor Hub → Customers & Sales → **AI Quoter**. You must be signed in to the Hub. Whether you see it depends on your plan (the plan setting is named `ai.quote_generation`; which plan includes it is a placeholder, not approved).

What the screen controls: it builds a draft quote for one customer. It uses the same AI routes as the "Quote it with AI" button on the quote screen. The AI lists work items and sizes only. The AI never sets a price; prices come from your price book.

Before you start

- Add the customer first (Customers). The AI Quoter cannot create customers.
- Fill in your price book so the draft can be priced (see price-book).
- The site owner must have added the AI service key. If it is missing, the screen shows "Needs setup: the AI service key is missing" and the **Write the draft** button stays off.

Top of the screen

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Banner: "The AI Quoter is not part of your plan."	Tells you the feature is locked. Also shows a **See plans** button that opens Settings → plan.	Nothing to enter.	Shown only when locked. The plan that includes it is a placeholder, not approved.
Banner: "Needs setup: the AI service key is missing."	Tells you the site owner must add the AI key.	Nothing to enter.	Shown only when setup is missing.
Line: "AI drafts are starting points; review prices and quantities before sending"	A reminder. It appears above the drafts too.	Nothing to enter.	Always shown.
Usage today: N of N AI requests (click to open)	Shows how many AI requests you have used today against your limit, plus your picture credits this month.	Click to read the notes.	Read-only. The numbers come from your plan and are placeholders, not approved.
Retry button	Loads the screen again after an error.	Click it.	Appears only if the screen failed to load.

1. Who is it for?

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Find a customer (search box, placeholder "Type a customer name")	Filters the Customer list as you type. It waits about 0.3 seconds after you stop typing.	Part of a name, such as "Smith".	Empty. Shows up to 40 matches.
Customer (choose list)	Sets who the draft quote will be saved for. Choosing a customer also loads that customer's properties and designs.	Pick one, such as "Smith, Jane – 12 Oak St".	"Choose a customer…". If you have none: "No customer yet? Add one under Customers first."
Property (choose list)	Picks the property whose measurements the AI can use.	Pick the address for this job.	The customer's first property. Shows "No property saved" if none (optional).
Design (choose list)	Attaches a saved design from one of this customer's quotes. Its plants and features are sent to the AI. If the design has a description, it fills the job box when the box is empty.	Pick a design, or leave "No design – describe the job instead".	"No design". If there is none: "This customer has no saved design".

When you pick a design, its picture appears below. A note says "Concept picture – not a build-ready plan" if the picture was made with AI.

2. What is the job?

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Common jobs (buttons)	Adds a ready sentence to the job box. Choices: Mulch refresh, New planting bed, Paver patio, New lawn, Fence, Spring clean-up.	Click one. Click several to join sentences.	Nothing added until you click.
Describe the job in your own words	The text the AI turns into work items. More detail (sizes, plants, what to remove) gives a better draft.	"Remove the old shrubs along the front of the house, make a 3 ft deep bed with steel edging, plant 6 boxwoods, mulch everything."	Empty. Up to 3,000 characters.
Use the measured areas	Sends the property's saved measurements so the AI does not	Leave ticked if you measured the property.	Ticked. Appears only when the property has measurements. Without them the AI estimates sizes

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
for sizes (checkbox)	guess sizes. The label also shows the measurement's title.		and lists what it assumed.
Use the customer's design (checkbox)	Sends the design's plants and features, with counts, to the AI. The label shows the total count.	Leave ticked to price the design.	Ticked. Appears only when the chosen design has plants or features.
Write the draft (button)	Asks the AI for the work items. Takes about 10 to 30 seconds.	Click it once and wait.	Off until the AI is ready. If your text is under 10 characters and you have no measurements or design, it asks you to describe the job first. If a draft exists it asks "Replace the draft below with a new one?"

3. Check the draft

This part appears after the AI answers. It starts with two lists when the AI has something to say: **What the AI assumed** and **Worth checking on site**. A line "Add your price or quantity for:" names lines that still need a price or quantity.

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Section title	Names a group of work on the quote, such as "Front bed".	Type a new title.	Written by the AI.
Include (checkbox)	Leaves the section on or off the draft and its total.	Untick to leave it out without deleting it.	Ticked.
Remove section (trash button, "Remove section ...")	Deletes the section after you confirm "Remove this section?"	Click and confirm.	If you remove the last section, the draft is cleared.
Type (choose list per line)	Says what kind of cost the line is. Options: Material, Labor, Equipment, Subcontractor, Disposal, Delivery, Other. Choosing Labor with no unit cost uses your crew rate.	Pick the right type.	Set by the AI.
Item	The line's name.	"Boxwood, 3 gal".	Set by the AI.
Qty	How many. Lines with a missing quantity are highlighted.	A number, such as 6.	Set by the AI.
Unit	The unit word.	"ea", "sq ft", "yd".	Set by the AI.
Unit cost	What one unit costs you. Hidden on Labor lines that use the crew rate (the line shows "crew rate $X/hr" instead).	A number, such as 42.50.	Filled from your price book where it matches.
Remove line (X button)	Deletes one line.	Click it.	No confirmation.
+ Add a line	Adds a blank Material line.	Click, then fill in Item, Qty, Unit and Unit cost.	New line: Material, qty 1, unit "ea", cost 0.
Polish the wording with AI (button)	Rewrites the section titles and scope bullets, and writes an intro. Quantities and prices are not touched. If the AI changes a number, that section is kept as written and a message tells you.	Click once after your edits.	Off until the AI is ready.
Create the quote draft (button)	Saves an ordinary draft quote for the chosen customer and opens it. Nothing is sent.	Click when the lines look right.	Off until you choose a customer in step 1.

The totals row shows Subtotal, Tax (only if your tax setting is above zero) and Total. Tax and deposit come from your Costs settings.

Recent AI drafts

This list shows drafts you created with the AI Quoter: number, title, customer, status, total, work items, "wording by AI" and date. Click a row to open the quote. When it is empty you see "No AI drafts yet" and a **Describe a job** button that moves you to the job box.

Steps

1. Open Contractor Hub → Customers & Sales → AI Quoter.
2. Check the banner. If it says locked or needs setup, stop and ask the site owner.
3. Under "1. Who is it for?", search and pick the **Customer**. Pick the **Property** and, if there is one, the **Design**.
4. Under "2. What is the job?", click a **Common jobs** button or type in **Describe the job in your own words**.
5. Keep or untick **Use the measured areas for sizes** and **Use the customer's design**.
6. Click **Write the draft** and wait up to half a minute.
7. In "3. Check the draft", read the assumptions. Fix titles, types, items, quantities, units and unit costs. Fill in lines that are highlighted.
8. Optional: click **Polish the wording with AI**.
9. Click **Create the quote draft**. The quote opens. Review it, then send it from the quote screen when you are ready.

To confirm it worked, look for the message "Draft quote created. Nothing was sent." and find the quote in Recent AI drafts.

Tips

- Give sizes in your description, such as "3 ft deep, 40 ft long".
- Fix the lines marked as needing a price before you send anything.

- Each AI request counts toward your daily limit and each polish uses an AI request too (effect on credits not verified in code beyond the usage lines on screen).

If something goes wrong

- **"The AI could not turn that into work items."** Add more detail and try again.
- **The Write the draft button is off.** The AI key is missing, the feature is locked, or it is paused. Read the banner.
- **A plan error with a See plans button.** Your plan does not include the AI Quoter.
- **The draft saved but is missing from Recent AI drafts.** The quote is saved; only the list missed it. Find it under Quotes.

Hub search box, New button and guided tours

How the search box and New menu in the Contractor Hub header work, plus the guided tour offer and the Tours & tips window.

Two controls sit in the header of every Contractor Hub screen: a search box and a **New** button. A third thing, the guided tour, helps first-time users find their way. This article lists every input on them.

Where to find them: the search box and **New** button are in the Contractor Hub header on every screen. The tour offer and Tours & tips window are in the customer-facing VisionScaper app (home screen, editor and AI studio). Everyone who can sign in to the Hub sees the header controls. What each person finds depends on their role.

Search box

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Search (placeholder "Search customers, quotes, jobs...")	Looks across your customers, properties, jobs and visits, quotes, invoices, tasks, screens and settings pages as you type. The server finds and ranks results and checks each one against your permissions.	A name, address, phone number or quote number, such as "Smith" or "Q-1042". Type at least 2 characters.	Empty. Search starts about a quarter of a second after you stop typing.
Recent list (shown when the box is empty)	Reopens things you opened lately.	Click the box without typing.	Up to 20 items, newest first, saved in this browser only. A settings page is never saved as recent.
Result rows	Open the item. A customer or quote opens its screen; a property opens the customer's Work tab; a job opens Field work; an invoice opens Invoices; a settings page opens that settings tab and highlights the setting; a task opens a small card (tasks are worked on in the phone app).	Click, or use the arrow keys and press Enter.	The first row is chosen when you press Enter. Escape closes the list.

Screen shortcuts also appear. You can type an everyday name or an old name, such as "Receivables", "Pipeline", "Timesheets", "Dispatch" or "Takeoff" (at least 3 letters), and a matching Hub screen is listed under "Screens".

If nothing matches, the box says "Nothing found. Check the spelling, or try part of the address or phone number." If the box is empty and you have no recent items it says "Nothing here yet. Type a name, address, phone number or quote number."

The New button

Click **New** to open a menu. Which items appear depends on the person's rights.

Menu item	What it does	Who sees it	Notes
New customer	Opens the add-customer form.	Anyone allowed to edit customers or add leads.	
New quote	Opens a new quote.	Anyone allowed to draft documents.	
New job or visit	Opens the visit form.	Anyone allowed to assign jobs.	
New invoice	Opens a new invoice.	Anyone allowed to see money and draft documents.	
New expense	Opens the quick expense form.	Anyone allowed to add expenses.	
New task	Opens the quick task form.	Everyone.	
Clock in	Opens the quick clock-in.	Everyone.	

Use the arrow keys to move through the menu, Enter to choose and Escape to close. Set who gets which right in settings-team-permissions.

Guided tours (customer app)

The first time someone opens the home screen, the editor or the AI studio, a card offers a tour. It is offered once per screen.

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Show me (button)	Starts a spotlight tour that points at the real buttons.	Click.	
Skip (button)	Closes the offer and does not offer that screen again.	Click.	
Don't offer tours again (checkbox)	With Skip, turns tours off for this browser.	Tick before clicking Skip.	Off.
Skip tour / **Back** / **Next** / **Got it!** (tour buttons)	Move through or end a tour. Escape also ends it.	Click.	The last step shows "Got it!".

Tours & tips window

Open it from My Account (tile "Tours & tips") or from the guide ("Guided tours & tips").

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Offer a guided tour the first time I open each screen (checkbox)	Turns offers on or off.	Tick or untick.	On.
Show all tours and tips again (button)	Forgets which tours you finished and turns offers back on. It also brings back the "This uses 1 AI credit" reminder.	Click.	
Home screen, **Design editor**, **VisionScaper AI** (buttons under "Start a tour now")	Starts that tour now. The editor and AI tours need that screen open.	Click one.	

Tour choices are saved in the browser only (they are not an account setting).

Hub "Show me" tours

The Today, Quotes, Jobs, Calendar and Money screens each have a **Show me** tour. It runs only when you ask, never on its own, and it skips steps whose button is not on screen.

Steps

1. To find something, click the search box and type at least 2 characters. Pick a row.
2. To add something, click **New** and pick an item.
3. To switch tours off, tick **Don't offer tours again** on the offer card, or untick the box in Tours & tips.
4. To bring tours back, open Tours & tips and click **Show all tours and tips again**.

Tips

- Recent items are saved per person in this browser, so a different computer starts empty.
- If a settings name is hard to find, type it into the search box.

If something goes wrong

- **"Search did not work. Try again."** Check your connection and type again.
- **A New item is missing.** You may not have the right for it. Ask the owner to change your permissions.
- **Tours do not appear.** Tours may be off, or you finished them. Use **Show all tours and tips again**. Tours are also not offered in preview mode.

Customer financing: every setting and button

Field-by-field guide to the Customer financing screen: lender link, example rate, loan lengths, wording, lender results and payment estimates.

VisionScaper is not a lender and never approves anyone. This screen lets you paste your own lender's apply address so you can offer customers a way to pay over time. VisionScaper makes a personal apply link for a quote and keeps a list of where each application stands.

Where to find it: Contractor Hub → Finance & Reports → **Customer financing**. Your plan must include it (setting `financing.consumer`; which plan is a placeholder, not approved). If it is not part of your plan the quote screen says "Customer financing is not part of your plan."

Before you start

- You need an agreement with a lender who gives you an apply web address. VisionScaper does not choose or sign you up with a lender.
- Have your lender's current rate and loan lengths ready. The rate on this screen is only an example for estimates.
- Have your lender or lawyer check the words shown with every estimate.

The "Your lender" card

At the top, a line says either "Ready. You can offer financing on any quote." or "Not ready yet:" with what is missing. A note about the wording not being approved is shown above the card.

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
How it works (`mode`)	Chooses how a customer applies. Options: **Apply link** (customers apply on the lender's own site) and **Lender's application service (advanced)** (for a lender that gives you a service address and key; needs a developer to match the lender's field names and is not tested with any live lender).	Pick Apply link unless a developer set up the advanced mode.	Apply link.
Lender name (`lender`)	The name shown to you and on the quote.	"Example Home Loans". Up to 80 characters.	Empty.
Your lender's apply address (`apply_url`)	The web address customers are sent to. Shown only in Apply link mode. Must start with https://. You can put `{reference}` and `{amount}` in it; if you do not, they are added to the end.	`https://lender.example/apply`	Empty.
Lender's application service address (`api_url`)	The lender's service address. Shown only in the advanced mode.	Must start with https://.	Empty.
Key from your lender (`api_key`)	The key for that service. Stored scrambled and never shown again.	Paste the key. Leave blank later to keep the saved one (shows "Saved. Type a new one to replace it.").	Empty.
Example APR for estimates (%) (`default_apr`)	The rate used in the payment estimates. VisionScaper does not know your lender's rate.	A number from 0 to 60.	Empty. Any example you use is a placeholder, not approved; use your lender's rate.
Loan lengths to show (months) (`terms`)	The loan lengths listed in estimates.	Numbers separated by commas, such as `24, 48, 60`. Give 1 to 8 values, each from 3 to 360.	24, 48, 60, 84.
Smallest quote to offer it on ($) (`min_amount`)	Financing is not offered on quotes below this amount.	A number from 0 to 1,000,000.	0.
Words shown with every estimate (`disclosure`)	The notice shown with payment estimates.	Up to 1,200 characters.	Built-in wording that says financing is by the lender, payments are estimates, and it is not an offer of credit. Placeholder wording, not approved.
Financing is on (`enabled`)	Turns the feature on.	Tick when the lender address is saved.	Off.
Put the customer's name, email and phone in the apply link (`customer_details`)	Adds the customer's contact details to the link so they do not retype them.	Tick only if your lender accepts them.	Off.
Save financing settings (button)	Saves everything above. Errors show in red above the button.	Click once.	

Let your lender tell VisionScaper the result (optional)

Open the section named "Let your lender tell VisionScaper the result". If your lender can send messages when an application changes, give them the address and secret. Their messages then show as "Confirmed by the lender". Without this, you mark the result yourself.

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Address (read-only box)	The address your lender sends results to. Copy it from here.	Select and copy it.	Appears after you save the settings once.
Make a secret / **Make a new secret** (button)	Creates the secret your lender must send. A new secret replaces the old one; you must give the lender the new one or their messages are refused (you are asked to confirm).	Click, then copy.	The secret is shown once.
Copy (button)	Copies the new secret.	Click.	If copying fails, select it and copy by hand.

Applications

Each application row shows the customer, quote number, title, amount, status and whether it is "Confirmed by the lender" or "Marked by you (the lender has not confirmed it)". Statuses: Offered, Applied, Approved by the lender, Declined by the lender, Funded.

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Mark as… (choose list)	Records the result yourself. Options: Applied, Approved by the lender, Declined by the lender, Funded (the current status is left out).	Pick the status your lender told you.	"Mark as…". Not shown once funded.
Save (button on each row)	Saves the status.	Click after choosing.	
Copy apply link (button)	Copies the customer's personal link so you can send it.	Click, then paste into a message.	
Go to my quotes / **Add my lender**	Empty-state buttons that open Quotes or move you to the Lender name box.	Click.	

Try a monthly payment

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Amount ($)	The loan amount to illustrate.	`10000`.	Empty (hint shows 10000). Minimum 1.
APR (%)	The rate to illustrate.	Your lender's rate.	Your saved example APR.
Show payments (button)	Shows a table of Months, Per month, Total paid and Interest, with a note that it is only an estimate.	Click.	

On the quote screen

A "Financing" block on each quote shows the status. **Offer financing** (or **Offer again** after a decline) creates the application and the apply link. **Copy apply link** copies it. If financing cannot be offered, a short reason is shown instead.

Steps

1. Open Contractor Hub → Finance & Reports → Customer financing.
2. Under **How it works**, leave **Apply link**.
3. Type the **Lender name** and paste **Your lender's apply address**.
4. Enter an **Example APR for estimates (%)** from your lender, and the **Loan lengths to show (months)**.
5. Set **Smallest quote to offer it on ($)** if you want a floor.
6. Read **Words shown with every estimate** and replace them with wording your lender approves.
7. Tick **Financing is on**, then click **Save financing settings**. Look for "Saved." and the line "Ready. You can offer financing on any quote."
8. Open a quote and click **Offer financing**, then **Copy apply link** and send it to your customer.
9. When your lender tells you the result, return here and use **Mark as…** then **Save**.

Tips

- Use **Try a monthly payment** to check numbers before you quote.
- Never tell a customer they are approved until the row says "Approved by the lender" and your lender agrees.

If something goes wrong

- **"Not ready yet"**: the line names what is missing, usually the apply address.
- **"Give 1 to 8 loan lengths in months, each from 3 to 360."** Fix the Loan lengths box.
- **Lender messages are refused.** You probably made a new secret; give it to your lender.
- **Nothing in Applications.** First turn financing on and save, then offer it from a quote.

Community screen: overview and totals

What the Settings → VisionScaper Community screen shows at the top and how its sections fit together.

Find this screen at **Settings → VisionScaper Community** in WordPress. Only users who can manage options (WordPress administrators) can open this screen. It is where you moderate what members post in the VisionScaper community and manage member points.

What you see

After the page title there is a green message bar (only after you press an action) and a line of four totals. Then three sections: Needs review, Latest posts and Members.

Fields

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Posts	Read-only count of community posts whose status is live.	Nothing to enter.	Hidden and removed posts are not counted.
Comments	Read-only count of live comments.	Nothing to enter.	
Members with points	Read-only count of users who have a lifetime points total stored.	Nothing to enter.	
Messages	Read-only count of all member messages stored.	Nothing to enter.	Counts every message, not only live ones.
Green message bar	Shows the result of your last action, for example "Removed." or "Points given."	Nothing to enter.	Appears only after an action.

Steps

1. In WordPress, open **Settings → VisionScaper Community**.
2. Read the four totals to see how active the community is.
3. Scroll to **Needs review** first. Anything reported or hidden is listed there.
4. Then check **Latest posts** and **Members**.

Tips

- Check Needs review a few times a week.
- The totals refresh each time you load the page.

If something goes wrong

- If the page says "No." you are not an administrator.
- If totals show 0 after members have posted, reload the page (effect on stored data not verified beyond the counts above).

Route planner: every field and button

Field-by-field guide to the Route planner: day, crew, start, stops, vehicle and fuel, crew cost, lunch, fixed stop and calendar update.

The Route planner works out the order of one crew's stops for one day that uses the fewest miles. It can also plan lunch, predict when the tank runs low, and name gas stations.

Where to find it: Contractor Hub → Schedule & Field → **Route planner**. You can also click **Plan this day's route** from a visit on the calendar. It is a tool you can switch on or off in "Show me" settings. Your plan must include it (not verified which plan).

Before you start

- Add your crew teams and working hours in Settings (see settings-crew-list-private-notes-and-working-hours). The Crew choice and the **Leave at** time come from there.
- Give visits an address. Calendar visits with no address are added but flagged as needing one.
- The server looks up addresses, driving distances and nearby places, so you need an internet connection.

1. The day

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Day	Picks the day whose calendar jobs are pulled in and the date the plan is for.	Choose a date.	Today, or the day you opened it from.
Crew	Plans only that crew's jobs. Each crew's route is planned on its own.	Pick a team name.	"Choose a crew" if you have crew teams, otherwise "All jobs".
Leave at	The time the crew starts driving.	A time such as 07:30.	Your working-hours start.
Start from	Where the day starts, with address suggestions. Saved for next time.	Your yard or shop address.	The last address you used, or your business address and ZIP.
Come back here at the end of the day (checkbox)	Ends the route back at the start address. Untick to type another end.	Leave ticked or untick.	Ticked.
Where the day ends	A different end address. Appears only when the box above is unticked.	Another address.	Empty.

2. Stops

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Pull from my calendar (button)	Adds that day's calendar visits (not cancelled, not time off) for the crew you chose, in time order. A message tells you how many were added and how many need an address.	Click.	Visits already added are skipped.
+ Add an address (button)	Adds a blank stop.	Click, then fill in the row.	New stop: 60 minutes.
Stop name (placeholder "Name (optional)")	A label for a typed stop. Visits from the calendar show their title and booked time instead.	"Supplier yard".	Empty.
Address (placeholder "123 Main St, Town, ST")	Where the stop is. Choose a suggestion if one appears.	Full street address.	Empty. A stop the server cannot find is marked with a message.
Minutes on site (shown as a number with "min")	How long the crew stays.	0 to 720, in steps of 5.	60 for typed stops. For calendar visits, the visit's length is used (not verified in code).
Remove stop (X button)	Takes the stop out.	Click.	

3. Make it smarter (optional)

This section opens by itself when you saved a vehicle or crew wage earlier. Your answers (except "Fuel in the tank right now") are saved in this browser for next time.

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
What are you driving?	Picks a vehicle so the planner knows its miles per gallon and tank size. The list shows each vehicle with its mpg.	Pick a vehicle, or "Other — I'll type its MPG and tank size".	"Choose your vehicle (optional)". Figures are typical, not exact.
Miles per gallon	Your own mpg. Shown only for Other.	3 to 60, steps of 0.5.	Empty.
Tank size (gallons)	Your own tank size. Shown only for Other.	5 to 100, steps of 0.5.	Empty.
Pulling a trailer (checkbox)	Lowers mpg by about 25 percent in the fuel prediction.	Tick if you tow.	Off.

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Fuel in the tank right now (buttons)	How full the tank is now, so the planner can tell if you will need gas. Choices: ⅛, ¼, ½, ¾, Full. Click again to clear.	Pick one.	None.
Crew size	Number of people on the crew.	1 to 30.	Empty.
Total hourly wage of the whole crew ($)	Everyone's hourly pay added together. Paid driving time is counted as a cost when choosing gas stations.	A number such as 75.	Empty.
About what time? (lunch)	When lunch should happen.	A time such as 12:00.	12:00.
How long? (lunch)	Length of lunch. Options: No lunch break, 20 min, 30 min, 45 min, 1 hour.	Pick one.	30 min.
Be close to restaurants at lunch (checkbox)	Plans the lunch break near places to eat.	Tick if wanted.	Off.
Be near … at … (checkbox)	Adds a fixed stop such as meeting another crew or picking up a part. Opens the three boxes below.	Tick to use.	Off.
Address (fixed stop)	Where the fixed stop is.	Supplier or crew address.	Empty.
Be there by	The time the crew should arrive.	A time such as 14:00.	14:00.
Minutes there	How long the crew stays.	0 to 240.	15.
Plan my route (button)	Finds the best order and shows each leg. If the tank will run low it lists three gas stations by lowest total cost (fuel, extra driving and paid crew time) with the reason for each.	Click once.	

After you plan

Control	What it does
Print route sheet	Prints the day's sheet.
Open as a page (save as PDF / share)	Opens the sheet as a page you can save or share.
Open in Google Maps (or **Google Maps (part N)**)	Opens the route in Google Maps. Long days are split into parts of up to 9 stops in between.
Update the calendar times	Opens "Update the calendar". Shown only when some stops are calendar visits.
Tell the customers about their new times (checkbox)	When ticked, customers are notified of the new times. Off by default.
Update the times (button)	Moves each calendar visit to its planned start time and length, and reports how many appointments were updated.

Steps

1. Open Route planner. Pick the **Day** and **Crew**, and check **Leave at** and **Start from**.
2. Click **Pull from my calendar**, or add addresses with **+ Add an address**.
3. Fix any stop marked as needing an address, and adjust **Minutes on site**.
4. Optional: open "3. Make it smarter" and answer the vehicle, crew, lunch and fixed-stop questions.
5. Click **Plan my route**.
6. Read the order and legs. Print the sheet or open it in Google Maps.
7. Optional: click **Update the calendar times**, decide whether to tick **Tell the customers about their new times**, and click **Update the times**.

Tips

- Plan in the evening so the crew has the sheet before they leave.
- Leave customer notification off until you are sure of the times.

If something goes wrong

- **No jobs added:** the message says "No (new) jobs on the calendar that day". Check the day and crew.
- **A stop shows an error:** retype the address and pick a suggestion.
- **Your saved answers are missing:** they are kept in this browser only; a private window or another computer starts blank.

Website chat: every setting and button

Field-by-field guide to Website chat: replies, look, open hours, AI first reply, privacy, the snippet and the WordPress option.

Website chat is a chat box for your website. Visitors leave their name and a way to reach them. You answer from this screen or from your Messages inbox. The list refreshes itself every 15 seconds while this screen is open.

Where to find it: Contractor Hub → Marketing & Growth → **Website chat**. Your plan must include it (setting `chat.widget`; which plan is a placeholder, not approved). The screen has three tabs: **Conversations**, **Look and hours** and **Put it on your site**.

Before you start

- The chat is **off** until you tick **Show the chat on my website**. A yellow note says so at the top until then.
- For the AI first reply you need the AI Receptionist question-and-answer list (see receptionist-settings-keys), and the site owner must have added the AI key.

Tab: Conversations

The left list shows each chat with the name, time, last message, and labels "N new", "Wants a person" and "Closed". Click a chat to read it. With no chats you see "No chats yet".

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Your reply (placeholder "Write a reply")	Your answer to the visitor. It also appears in your Messages.	Up to 1,000 characters.	Empty. Disabled when the chat is closed.
Send reply (button)	Sends the reply. If the box is empty it says "Write a message first."	Click.	
Close this chat / **Reopen** (button)	Ends or restarts the chat.	Click.	
Delete this chat (link)	Deletes the chat and its messages after you confirm. The customer record stays.	Click and confirm.	

Replies are marked as you, "AI assistant" or "Automatic".

Tab: Look and hours

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Show the chat on my website (`enabled`)	Shows the chat box to visitors.	Tick when ready.	Off.
Button and window title (`title`)	The text on the chat button and the top of the window.	Up to 60 characters.	"Chat with us".
Greeting (`greeting`)	The first message visitors see.	Up to 240 characters.	"Hi! Ask us a question or tell us about your yard. We reply here."
Side of the screen (`position`)	Which corner the button sits in. Options: Bottom right, Bottom left.	Pick one.	Bottom right.
Colour (colour picker)	The chat's colour. A live preview sits below.	Pick a colour.	Your brand colour.
Use my brand colour (checkbox)	Uses the brand colour instead of a custom one.	Tick or untick.	Ticked until you pick a colour.
Sun … Sat (open days, checkboxes)	Days you answer chats.	Tick each open day.	Monday to Friday.
Open from	Hour the chat opens. Choices run from 12 am to 11 pm.	Pick an hour.	8 am.
Until	Hour it closes. Choices run from 1 am to 12 am (midnight).	Pick an hour.	5 pm.
After-hours message (`after_hours`)	Sent automatically when a visitor writes outside your hours (once per 12 hours, with your hours added).	Up to 300 characters.	"Thanks for your message. We're away right now and will reply here as soon as we're open."
Let the AI answer first, from my own answers only (`ai_on`)	The AI replies first using only the questions, answers, services and service area you saved in the AI Receptionist. It says it is your AI assistant if asked, never gives a price or promises a date, and hands the chat to you when it cannot answer or they ask for a person. Each AI reply uses 1 AI credit (placeholder, not approved). The code stops the AI after 3 replies in one chat.	Tick to turn on.	Off. A warning shows if the AI key is not set.
Delete chats after this many days (`retention`)	Chat messages older than this are deleted. The customer record stays.	7 to 730.	180.

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Consent line (read-only)	The notice visitors see before they start.	Nothing to enter.	Fixed text.
Save (button)	Saves the tab. A bad value shows in red.	Click.	

Tab: Put it on your site

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Chat snippet (read-only box)	One short piece of code for another website.	Click inside to select it.	The chat shows nothing until it is turned on.
Copy snippet (button)	Copies the snippet.	Click, then paste it just before the closing `</body>` tag of the other site (many builders call it "custom code" or "footer").	
Shortcode (shown as text)	Puts the chat on one WordPress page or widget.	Paste `[dreamscaper_chat]` where it should appear.	
Show the chat on every page of this site	Prints the chat on all pages of this WordPress site.	Tick (site administrator only).	Off. Others see "Only the site administrator can switch this on."

Steps

1. Open Website chat → **Look and hours**.
2. Set the title, greeting, side and colour. Watch the preview.
3. Tick your open days and choose **Open from** and **Until**. Edit the **After-hours message**.
4. Decide on **Let the AI answer first…** and **Delete chats after this many days**.
5. Tick **Show the chat on my website** and click **Save**. Look for "Saved."
6. Open **Put it on your site** and use the snippet, the shortcode or **Show the chat on every page of this site**.
7. Check **Conversations** often; answer from there or from Messages.

Tips

- Short greetings get more replies.
- A closed chat does not accept replies until you click **Reopen**.

If something goes wrong

- **Visitors do not see the chat:** it is off, or the snippet is not on the page.
- **The AI never answers:** the AI key is missing or the AI Receptionist has no saved answers.
- **Save shows a red message:** read it and fix the field. A retention value outside 7 to 730 days is adjusted into that range when saved.

Security screen: two-step sign-in, history and activity log

Field-by-field guide to the Security screen: authenticator setup, recovery codes, manager rule, team reset, sign-in history and the activity log.

The Security screen protects your Hub account with a second step at sign-in. It also shows who signed in and what changed.

Where to find it: Contractor Hub → Settings & Integrations → **Security**. Every Hub user can open it for their own account. The owner also sees team controls.

Before you start

- Install an authenticator app on your phone, such as Google Authenticator, Microsoft Authenticator or Authy.
- If the screen says "This website cannot keep the key safe yet (a PHP part is missing)", ask your website host to turn on OpenSSL. Until then the setup button is off.

Two-step sign-in (when it is off)

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Your password, to begin	Proves it is you before a secret key is made.	Your VisionScaper sign-in password.	Empty.
Set up two-step sign-in (button)	Starts setup.	Click.	Off if the website cannot encrypt.

If your company requires it for managers, a red note says "Your company needs managers to use two-step sign-in. Turn it on now to carry on working."

Set up your authenticator app

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
QR picture and **Key**	Gives your app the secret. Scan the picture, or choose "enter a key" in the app and type the key. The key is shown once; anyone who has it can make your codes.	Scan or type.	Read-only. "Show the setup link" shows the same secret as a link.
Code from the app	Confirms the app works.	The 6-digit code shown now.	Empty.
Turn on (button)	Switches two-step on and shows your recovery codes.	Click.	
Cancel (button)	Stops setup.	Click.	

Your recovery codes

Each code works once if you lose your phone. **Copy**, **Download** (a text file) and **Print** save them. Tick **I have saved these codes somewhere safe** to enable **Done**.

Two-step sign-in (when it is on)

The screen shows "On" with the date, and how many recovery codes are left. If three or fewer remain it warns you.

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Your password	Needed to make new codes or turn two-step off.	Your password.	Empty.
Code (placeholder "6-digit code or recovery code")	A current app code, or one recovery code.	Up to 12 characters.	Empty.
Make new recovery codes (button)	Makes a new set; the old ones stop working.	Click.	
Turn off (button)	Turns two-step off after you confirm.	Click.	

Managers must use two-step sign-in

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Require it for managers (checkbox)	A manager who has not set it up can open only this Security screen until they do. You, as the owner, are never blocked.	Tick, then click **Save**.	Off.

"Where two-step sign-in applies" lists each sign-in path as Covered or Not covered, read-only. If the site administrator switched it off for the whole site, a warning says so.

Sign out my other devices

Sign out other devices ends every other browser and phone sign-in after you confirm "Sign out everywhere else?". You stay signed in here.

Your team (shown when you have team members)

The table shows Person, Role and Two-step (On or Off). Click **Reset** beside someone who has it on, type **Type your own password to confirm**, then click **Reset two-step**. That person is signed out everywhere and can set it up again. **Cancel** closes the form.

Sign-in history

Sign-in history is kept for the number of days shown on screen and addresses are shortened on purpose.

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Show (choose list)	Filters by result. Options: All tries, Signed in, Failed.	Pick one.	All tries.
Who (choose list, owner only)	Options: Only me, Everyone on the team.	Pick one.	Only me.
Show (button)	Applies the filters.	Click.	
Download list (button)	Downloads the list as a spreadsheet file.	Click.	

Account activity

This log shows who changed what and when: reviews, library, security, your data, automations, training, messages and calls, billing and sign-ins.

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Area	Limits the log to one area.	Pick from the list.	Everything.
Person	Limits to one person's name.	Up to 60 characters.	Empty.
Words	Searches the descriptions.	Up to 60 characters.	Empty.
From / **To**	Date range.	Pick dates.	Empty.
Show / **Download list** (buttons)	Apply the filters or download the result.	Click.	

Steps

1. Open Security. Type **Your password, to begin** and click **Set up two-step sign-in**.
2. Scan the picture with your app, type the 6-digit code under **Code from the app**, and click **Turn on**.
3. Copy, download or print the recovery codes. Tick the saved box and click **Done**.
4. Owners: tick **Require it for managers** and click **Save** if you want the rule.
5. Next time you sign in, enter your password and then the app code.

Tips

- Store recovery codes away from your phone.
- If someone lost their phone, use **Reset** in Your team, not a password reset.

If something goes wrong

- **Code rejected:** check your phone's clock, or use a recovery code.
- **Locked out with no codes:** ask the owner to use Reset in Your team.
- **Setup button is off:** your host needs OpenSSL.

Card reader and Review replies: every field and button

Field-by-field guide to two Hub screens: Card reader (setup, payment request, record a payment) and Review replies (add, draft, approve, copy).

This article covers two Contractor Hub screens that were not described elsewhere.

Card reader

Where to find it: Contractor Hub → Finance & Reports → **Card reader** (plan setting `payments.card_reader`; which plan is a placeholder, not approved). The owner changes settings; other users see "Only the owner can change these settings."

A web page cannot read a card. Tap to Pay and card readers need the VisionScaper phone app (built with Stripe's Terminal software). This screen sets up the reader, makes the payment request the phone app collects, shows what Stripe confirmed, and lets you record a card payment taken some other way. It never marks an invoice paid by itself; only Stripe's confirmation or your own entry does.

Before you start

- Card payments through Stripe must already be set up under Finance & Reports → payments setup, and your payouts must be ready. If not, Setup shows what is missing and a **Go to payments setup** button. See get-stripe-keys and follow Stripe's current instructions.
- You need a sent invoice with a balance to collect or record against.

Setup

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Card reader is on (`enabled`)	Turns the feature on for your company.	Tick it.	Off. Owner only.
Place name (placeholder "Shop or office")	Names the place where you take payments.	"Shop". Up to 100 characters.	Empty.
Street	Address line for that place. Stripe needs it to register the reader and uses it only for that.	Street address.	Empty.
Town	City.	Town name.	Empty.
State (choose list)	US state or PR.	Pick two letters.	"State".
ZIP code	Postal code.	Up to 10 digits.	Empty.
Save the place / **Change the place** (button)	Saves the place.	Click.	Shows "Saved."

When the line reads "Ready. The phone app can now take card payments." you are set.

Ask for a card payment

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Invoice	The invoice to collect on. The list shows number, customer and balance left.	Pick one.	"Choose an invoice...".
Amount ($)	Part of the balance, if not all. Minimum 0.50.	`250.00`.	Empty means the whole balance.
Make the payment request (button)	Creates a waiting payment request. You then open the phone app, choose this payment and tap or insert the card there. The page shows Paid once Stripe confirms.	Click once.	Off until the setup is ready.

Record a card payment you already took

Use this for a card charged on another reader or machine. It is saved as "recorded by you, not checked with Stripe". Never type a whole card number.

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Invoice	Which invoice the payment belongs to.	Pick one.	Choosing one fills the amount with its balance.
Amount charged ($)	The amount you charged.	`250.00`.	Balance of the invoice.
Last 4 digits of the card (optional)	Helps you match the charge later.	`1234`.	Empty.
Approval code (optional)	The machine's approval code.	Up to 20 characters.	Empty.
Date taken	The day it was charged.	Pick a date.	Empty means today.

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Note (optional)	A short note.	Up to 150 characters.	Empty.
Record this payment (button)	Saves it and says whether the invoice is now paid in full or how much is still owed.	Click once.	

Card payments list

Requests show a status. **Cancel** appears on a request still waiting. A request in review says "Check this in your Stripe account." Recorded payments appear under "On your invoices", and voided ones are marked Voided.

Review replies

Where to find it: Contractor Hub → Marketing & Growth → **Review replies** (plan setting `reviews.ai_replies`; plan is a placeholder, not approved). VisionScaper never posts a reply for you: there is no connection to Google, Facebook or Yelp for that. You approve the words, copy them and paste them on the review site yourself.

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Reviews / **Archived** (chips)	Switches the list between active and archived reviews.	Click.	Reviews.
Add a review / **Close** (button)	Opens or closes the add form.	Click.	The form shows by itself when the list is empty.
Bring them in (button)	Brings in private feedback messages from your review requests so you can write a reply. Shown only when some exist.	Click.	
Where was it left?	The review site. Options: Google, Facebook, Yelp, Other site.	Pick one.	Google.
Stars	The star rating. Options: Choose..., 5 stars down to 1 star.	Pick one.	Choose....
Reviewer's first name	Used in the reply. Only the first name is used. Emails, phone numbers and links are removed before the AI sees the review.	"Pat". Up to 40 characters.	Empty.
The review	The review's text.	Paste it. Up to 2,000 characters.	Empty.
Add review (button)	Saves the review.	Click.	
Your reply	The reply text. You can edit it any way you like.	Up to 1,500 characters.	The AI draft once written.
Write a reply / **Write another version** (button)	Asks the AI for a draft.	Click once.	Off if the AI key is missing. Credit use is shown at the top (placeholder, not approved).
Save my edits (button)	Saves your changes.	Click.	
Approve these words (button)	Marks the reply approved.	Click when it reads right.	Off if the box is empty.
Copy reply (button)	Copies the approved reply. Then paste it on the review site.	Click.	Off until approved.
Open to paste it (link)	Opens the review site's reply page.	Click.	Shown when the site address is known.
Archive / **Bring back**	Moves a review out of or back into your list.	Click.	

Steps

1. Card reader: tick **Card reader is on**, save the place, then ask for a payment or record one.
2. Review replies: click **Add a review**, fill in the four boxes, click **Add review**.
3. Click **Write a reply**, edit the text, click **Approve these words**, then **Copy reply** and paste it on the review site.

Tips

- Re-read every AI reply. It is a starting point.
- Record a card payment only after the card was really charged.

If something goes wrong

- **Make the payment request is off:** the setup is not ready; read the line "Not ready yet:".
- **Write a reply is off:** the AI key is not switched on for this site.
- **A request shows "Check this in your Stripe account.":** open Stripe and look at that payment.

Public forms: website request form, review page and sign-in code

Every box on the visitor request form, the star-rating and private feedback page, and the two-step code box on the WordPress sign-in page.

These are the boxes your visitors and customers see. You do not fill them in, but you should know what each one does. Their settings live elsewhere (see the related articles).

1. Website request form (visitor side)

Where it appears: on the page where you put the shortcode `[dreamscaper_request]`, the one-line embed, or the form page link. You turn it on under Contractor Hub → Settings & Integrations → Connected apps (see settings-connected-apps-request-form). It is off until you do.

Each request becomes a lead. It never merges with an existing customer by itself, the customer gets an instant reply, and your office is alerted.

Field (exact label)	What it does for VisionScaper	What the visitor enters	Default / notes
Your name	The lead's name. Required.	Full name.	Empty.
Email	Where replies go. Needed for the email consent to count.	A valid email.	Empty.
Phone	Where texts go. Needed (10 digits or more, valid number) for the text consent to count.	Phone number.	Empty.
Property address	The job address. Required. Suggestions appear after 5 characters.	Street address.	Empty.
Town	The town. Filled from a chosen suggestion if empty.	Town name.	Empty.
What do you need? (pick any)	The services requested. Shown only if you have services enabled for the form.	Tick any.	None ticked.
Anything we should know?	Notes saved on the request.	Up to 2,000 characters.	Empty.
Photos of the area	Pictures saved with the request. Shown only if your "Photos allowed" setting is above 0, with that number shown.	Image files.	None.
Day and time buttons	Self-booking. Shown only when self-booking is on and there are open days. The visit stays a request until confirmed ("we will confirm it").	Pick a day, then a time.	None.
Best times to reach you (optional)	A note on when to contact them.	"Weekday mornings".	Empty.
Email me about this request (`consent_email`)	Records consent to email about this request. Without it, no email is sent to the visitor.	Tick.	Unticked.
Text me about this request (`consent_sms`)	Records consent to text about this request. Without it, no text is sent. Text also needs your text messaging to be ready.	Tick.	Unticked.
Hidden trap field (`hp`)	A box people cannot see. If a program fills it, the request is treated as spam.	Nothing.	Empty.
Cloudflare Turnstile	A spam check, shown only if you switched it on.	Passes by itself in most cases.	Off.
Send my request (button)	Sends the form. A status line appears below.	Click once.	

The consent wording shown under the boxes is saved with the request, with the time, so you can show what the visitor agreed to. It is not marketing consent. The boxes are not ticked for the visitor.

2. Review request page (customer side)

Customers reach this page from the link in a review request message. It starts with "How did we do?".

Field (exact label)	What it does for VisionScaper	What the customer enters	Default / notes
Star buttons 1 to 5 (`r`)	Records the rating. 4 or 5 stars lead to "Thank you" and links to your public review sites. Under 4 stars lead to the private form.	Tap a star.	None.
Anything we could do better? Tell us privately (textarea `fb`)	Shown to 4 and 5 star raters, inside a closed section. Sends a private note to the owner.	Up to 3,000 characters; placeholder "Your note goes only to the owner".	Empty.
Your name (optional) (`nm`)	Shown under 4 stars when the customer is not already known.	Name.	Empty.
What could we have done better? (textarea `fb`, required)	Shown under 4 stars. Sends a private note to the owner.	Up to 3,000 characters.	Empty.
Send privately / **Send to** (button)	Saves the note and shows "Your message went straight to ...".	Click.	

The page always keeps the public review links visible, even after a low rating. Private notes can be brought into Review replies (see article card-reader-and-review-replies-fields) with **Bring them in**.

3. WordPress sign-in page: Two-step code

Field (exact label)	What it does for VisionScaper	What to enter	Default / notes
Two-step code (only if you turned it on) (`dscp_otp`)	Added to the normal WordPress sign-in form. After the password is checked, VisionScaper asks for your authenticator code (or a recovery code) if two-step is on.	The 6-digit code, or leave blank if two-step is off for you.	Empty. Set it up in security-screen-fields.

4. A technical field: `organs`

`organs` is not a box on any screen. It is a field VisionScaper sends to Pl@ntNet when it identifies a plant from a photo. The value comes from a request setting named `organ` that accepts leaf, flower, fruit, bark or auto, and uses auto for anything else. No screen label for choosing it was found in code, so how it is chosen in the designer is (not verified in code).

Steps

1. To preview the request form, open the page that holds the shortcode in a private browser window.
2. Fill it in with a test lead, leave both consent boxes unticked, and send.
3. Check Customers and Inbox for the new lead.
4. To preview the review page, open the link from a review request you sent yourself.

Tips

- Consent boxes are never pre-ticked, on purpose.
- Keep the Turnstile off unless you receive spam.

If something goes wrong

- **No form shows:** it is switched off in Connected apps.
- **No text arrived:** the visitor must have ticked the text box and given a valid phone number.
- **Sign-in rejects the code:** use a recovery code or ask the owner to reset your two-step.

AI Receptionist in the Hub: the six setup steps and Settings tab

Every field in the AI Receptionist six-step setup and Settings tab: business, services, voice, greeting, what to collect and phone number.

The AI Receptionist answers your business phone and can call customers back. The WordPress settings that hold its keys and prices are in other articles. This article covers the Hub screen where you set up what it says and does.

Where to find it: Contractor Hub → Marketing & Growth → **AI Receptionist**. Your plan must include it (otherwise: "The AI Receptionist isn't part of your plan" with a **See plans** button). The first time you open it you get a six-step setup ("Step N of 6"). After that you get four parts: Calls, Campaigns, Settings, and Safety and records. The six steps reappear on the Settings tab as six sections, each with its own **Save** button. **Run the setup again** restarts the steps.

Before you start

- The site owner must have added the receptionist keys and a phone service (see receptionist-settings-keys, get-retell-keys, get-twilio-details).
- The assistant never claims to be a person. No setting removes that rule.

Step 1 or section "Your business"

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Business name	The name the assistant uses for your business.	Your company name.	Empty.
Business phone	Customers are told to call this number back.	Optional.	Empty.
State or region	Used for calling-law checks and local time.	"CT". Up to 40 characters.	Empty.
Country (2 letters)	Country of your business.	"US".	US.
Time zone	Your local time for hours.	Pick from the list.	Empty.
Open (checkbox per day)	Whether you are open that day.	Tick open days.	Monday to Friday open; Saturday and Sunday closed.
Opens / **Closes** (per day)	Business hours for each day.	Times.	08:00 to 17:00; Saturday 09:00 to 13:00.
After hours	What happens outside hours. Options: The assistant still answers and books visits; Take a message only; Pass the call to my phone.	Pick one.	The assistant still answers and books visits.

Step 2 or "Services, area and prices"

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Add a service (placeholder "e.g. Lawn care") with **Add**	Adds a service tag the assistant can talk about. Press Enter or Add. Click × on a tag to remove it.	"Lawn care".	None ("No services yet.").
Where you work	Your area in your own words.	"Hartford County".	Empty.
Towns you serve (separate with commas)	The towns the assistant accepts jobs in.	"Avon, Simsbury".	Empty.
Service (price range)	Which service a range is for.	A service name.	The first service.
From $ / **To $**	The price range it may quote. Only used if you set a range.	Whole dollars.	0 / 0.
Note (placeholder "per visit, per yard…")	How to describe the range.	"per visit".	Empty.
+ Add a price range / **Remove**	Add or delete a range row.	Click.	
If asked for a price and there is no range	What to say when no range exists.	A sentence.	"Never give a binding price. Give a range only when the business has set one, and say a written quote follows a visit."

Step 3 or "Voice and name"

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Voice (cards)	The voice that speaks. Choices: Ava, Noah, Grace, Owen, Sofia, Mia, My own voice (cloned from a recording with your consent recorded).	Click a card.	Ava.
Assistant's name	What it calls itself on the phone.	Up to 40 characters.	Ava.

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Voice service	The voice company. Options: ElevenLabs, Cartesia Sonic, Deepgram Aura (each with a short note).	Pick one.	ElevenLabs.
Language	Spoken language. Options include English (US, UK, Australia, Canada), Spanish (US, Spain), French (Canada), French, German and more from the server.	Pick one.	English (US).
Accent	Options: American, British, Australian, Canadian, Irish, Neutral.	Pick one.	American.
Speed (N×)	How fast it talks.	Slide 0.70 to 1.30.	1.00.
Warmth (N)	How warm it sounds.	Slide 0 to 100.	60.
Hear it (button)	Plays a sample of your greeting in this voice.	Click.	

Step 4 or "What it says"

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Greeting	The first thing callers hear. Use `{business}` for your name. "What callers will hear first" shows the result.	A sentence.	"Thanks for calling {business}, how can I help you today?"
Personality	How it should sound.	"Warm, brief, formal…".	"Warm, calm and practical. Short sentences. Never pushy."
Tell callers the call may be recorded	Plays the recording notice.	Tick or untick. You decide and check the rules where you work.	On.
Recording notice	The words of the notice.	A sentence.	"This call may be recorded to help us serve you."
Say it on calls people make to me	The assistant says it is the business's AI assistant at the start of inbound calls.	Leave on.	On.
Say it on calls I make (campaigns)	Same for outbound campaign calls.	Leave on.	On.
Warning box (**I confirm** tick and **Turn it off** / **Keep it on**)	Turning an announcement off requires you to read a warning and tick a box confirming you checked the laws. The date is recorded.	Read first.	
Question and **Answer** (rows)	Answers it can give. It answers only from this list and otherwise offers a callback.	"Do you do snow removal?" and the reply.	None.
+ Add a question / **Remove**	Add or delete a row.	Click.	

Step 5 or "What to collect and when to hand over"

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Collect list: **Name**, **Phone number**, **Email**, **Property address**, **Service needed**, **How urgent**, **Preferred day and time**, **How they heard about the business**, **Anything else**, **Photos (by text link)**	The details it asks every caller. It reads names, numbers and addresses back.	Tick each one you want.	Ticked: name, phone, address, service, urgency, time, source.
Must have (per field)	Marks a detail as required. Enabled only for ticked fields.	Tick.	Name, phone number, service needed.
Words that mean "urgent" (separate with commas)	Words that mark an emergency.	"flood, fire, gas".	flood, fire, tree on the house, downed tree, gas, injury.
Pass emergencies to a person right away	Transfers urgent calls.	Tick.	On.
Number to pass them to	Who gets transferred calls.	Your phone or the on-call person.	Empty.
Other times to pass the call to a person	Extra hand-over rules in your words.	"the caller is a commercial property manager".	Empty.

Step 6 or "Phone number and testing"

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Number it answers	The phone number the assistant picks up.	A number you bought from Twilio, or get one here.	Empty.
Get a new number: area code with **Get me a number**	Buys a number from your phone account after you confirm (numbers usually cost about a dollar a month).	Three digits, such as 860.	Empty.
Who answers first (choose one)	**The assistant answers right away**, or **Ring my phone first, then the assistant**.	Pick one.	The assistant answers right away.
My phone (to ring first)	The phone that rings first.	Your mobile.	Empty.
Ring for how many seconds	How long your phone rings.	5 to 40.	15.
Your mobile number (placeholder "Your mobile") with **Call me to test**	The assistant calls you so you can try it like a customer.	Your number.	Empty.

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Go live (last step) / **Turn it on** / **Pause the assistant**	Starts or stops the assistant answering.	Click.	Off until you go live.

On the setup the buttons are **Back** and **Save and continue**. In Settings each section has **Save**. If something is missing, the section shows the issue in red and does not save.

Keeping your existing number: ask your phone company to forward unanswered calls to the number above, or port it with your phone service. Porting is not done here.

A minutes bar with an **Add minutes** button lets you buy more minutes (prices are placeholders, not approved).

Steps

1. Open AI Receptionist and work through steps 1 to 6, pressing **Save and continue**.
2. On step 6 click **Call me to test** and talk to it.
3. Click **Go live**. Later, change anything in Settings and press that section's **Save**.
4. Look for "Saved."

Tips

- Add real answers under "Answers it can give". It answers only from that list.
- Keep both AI announcement switches on unless you have checked your local rules.

If something goes wrong

- **Plan lock message:** your plan does not include it.
- **Hear it plays nothing:** the voice service key is missing (effect not verified in code).
- **Get me a number fails:** check your phone account details.

AI Receptionist in the Hub: calls, campaigns, safety and do-not-call

Every field on the AI Receptionist Calls list, Campaigns form, Safety settings, do-not-call list, delete-a-number box and record of changes.

This is the day-to-day half of the AI Receptionist screen. Setup is in hub-ai-receptionist-setup-and-settings.

Where to find it: Contractor Hub → Marketing & Growth → AI Receptionist, tabs **Calls**, **Campaigns**, **Settings** and **Safety and records**.

Calls

Shows who called, when, how long, what they needed and what was booked. With none yet: "No calls yet". Buttons on a call: **Call back** (opens your phone dialer), **Open customer** and **Mark callback done** (shown only when a callback is needed).

Campaigns

A campaign calls a group of customers for a reason. Nobody is called until you confirm you have permission. With none: "No campaigns yet". Statuses: Running, Paused, Draft.

Buttons: **+ New campaign**, **Pause all campaigns** (shown while one runs), and on each campaign **Pause**, **Resume**, **Review and start**, **Edit**, **Delete** (these appear only when allowed for that status).

The campaign form (New campaign / Edit campaign)

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Who to call	Picks the group and fills a ready script. Options: Past customers, Quotes awaiting an answer, Seasonal reactivation, Review requests, Appointment reminders, Gentle invoice reminders, Custom.	Pick one.	Past customers.
Name	The campaign's name.	"Fall cleanup check-in".	The group's name.
What the assistant says	The script. The assistant answers questions and handles "not now" politely.	Edit the text.	The group's script.
Insert a name or detail (buttons)	Inserts a merge word: `{first_name}`, `{business}`, `{service}`, `{date}`, `{amount}`. An "Example" line shows the result.	Click at the cursor.	
Goal	What the call aims for. Options: Book a visit; Connect them to me; Ask whether they want to hear from us.	Pick one.	Set by the group.
Calling days (day buttons)	Days the campaign may call.	Click days.	Monday to Friday.
From (hour, 0–23)	Earliest hour.	0 to 23.	9.
Until (hour, 1–24)	Latest hour. Always inside your own calling hours on the Safety tab and judged by the time where the person is.	1 to 24.	17.
Calls per hour at most	Speed limit.	A number, 1 or more.	12.
Calls at the same time	How many calls run together.	1 to 20.	2.
Tries per person after the first	Extra attempts.	0 to 5.	2.
Hours between tries	Wait before a retry.	1 or more.	24.
Spending limit ($, 0 = none)	Stops the campaign at this spend.	Whole dollars.	0 (no limit).
Leave a short voicemail if nobody answers	Drops a voicemail.	Tick.	Off.
Send one text after the last try (only to people who agreed to texts)	A final text.	Tick.	Off.
Audience box ("N of N people can be called")	Shows who can be called and how many are skipped (no permission, no number, or on the do-not-call list).	Read-only.	
Where did it come from? (placeholder "e.g. signed quote form")	Records where permission came from, for people without it.	Short text.	Empty.
What did they agree to? (placeholder "e.g. I agree to receive calls about my property")	The wording they agreed to.	Their words.	Empty.
Record permission (button below those two)	Saves that permission for the people listed ("Permission recorded for N people."). Only use it if it is true.	Click.	
Save campaign (button)	Saves; problems are shown in red first.	Click.	

Review and start opens a window with the checks, a tick box **I confirm the above.** and the buttons **Confirm and start calling** (off until ticked) and **Not yet**.

Safety and records

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Say it on calls people make to me / **Say it on calls I make (campaigns)**	The AI announcement switches described in the setup article.	Leave on unless you checked the laws.	On / On.
Don't call before (hour)	Earliest calling hour for every campaign.	0 to 23.	8.
Don't call after (hour)	Latest calling hour. The page notes 8 in the morning to 9 at night is the usual limit and some places are stricter.	1 to 24.	21.
Also check the national do-not-call list	Checks that list. It needs a checking service; if there is none, nobody is called.	Tick.	Off.
Most you want to spend each month ($, 0 = no limit)	Monthly cap on spending.	Whole dollars.	0.
Save (button)	Saves these (and recording settings).	Click.	

This page helps you keep records. It is not legal advice.

Do-not-call list

Anyone who says "stop calling" on a call is added at once and skipped in every campaign.

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Add a number with **Add**	Puts a number on the list.	A phone number.	Empty.
Remove (per row)	Takes a number off.	Click.	
Delete everything about one number → **Phone number** with **Delete**	Removes calls, transcripts and permissions held for the number, after you confirm. The number stays on the list so it is not called again.	A phone number.	Empty.

Record of changes

A read-only table (When, Who, What) of consent, script, voice, announcement and do-not-call changes. It shows the last 50.

Steps

1. Check **Safety and records** first: calling hours and monthly cap.
2. In **Campaigns**, click **+ New campaign**, choose **Who to call**, edit the script, set days, hours and pace.
3. Read the audience box. Record permission only for people who truly agreed.
4. Click **Save campaign**, then **Review and start**, tick **I confirm the above.**, and click **Confirm and start calling**.
5. Watch **Calls** and use **Pause all campaigns** if needed.

Tips

- Start with a small pace and a spending limit.
- Keep the AI announcement on.

If something goes wrong

- **Fewer people than expected:** the audience box shows how many were skipped and why.
- **No calls happen:** the campaign is a Draft or Paused, or outside the calling hours.
- **Cannot save:** read the red message above the Save button.

Marketing Safety: consent, sending rules, auto-replies and carrier registration

Every field in the Hub's Marketing text and email safety tools: consent forms, list import, carrier registration, sending rules, auto-replies, AI notice and A/B tests.

These Hub screens keep your marketing texts and emails within the rules you choose. Every legal choice is a setting you control, with a safe default. Nothing here is legal advice.

Where to find it: Contractor Hub → Marketing & Growth → **Marketing**, then the **Conversations** and **Safety** parts. The WordPress-side limits are in messaging-safety-limits.

Before you start

- Text messaging must be set up by the site owner (see messaging-texts-settings).
- For the carrier registration you need your legal business name, Tax ID (EIN), website, street address and a contact email.

Conversations: reply box and do-not-contact

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Message to (reply box)	Sends a text to that customer. Placeholder: "Write a text…". It is disabled when texting is not possible ("why not" is shown) or replies in a website chat.	Up to 1,000 characters.	Empty.
Note (Do not contact sheet)	Marks the person "do not contact" for texts, emails and calls. Waiting messages are cancelled and it is recorded.	Why.	Empty.
Weather delay notice: **Day**	The day jobs are delayed.	Pick a date.	Today.
What to say	The text sent to customers booked that day.	A short message.	Empty (an example is shown as a placeholder).
See who would get it / **Send**	Previews the count and who is skipped, then sends.	Preview first.	Send is off until you preview.

Record consent for one customer

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
What they agreed to	Texts and/or Emails. A channel is disabled if the customer has no phone or email.	Tick.	Texts (Emails if no phone).
How they agreed	The source. Options: Agreed on a phone call; Signed quote or contract; Paper form; Website sign-up form; Agreed in person; Replied YES / START by text; Other (say how).	Pick one. Required.	Choose…
How did they agree?	Appears only for Other.	A short note.	Empty.
What they agreed to (the words)	The wording, kept as proof.	What the form said or what you told them. Required.	A built-in sentence for the chosen channels.
Date they agreed	When. Cannot be in the future.	A date. Required.	Today.
Proof (optional)	A photo or file of proof. PNG, JPG, WebP or PDF, up to 5 MB.	Choose a file.	None.
Save consent	Saves it to the record.	Click.	

Import a list with consent

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
People, one per line	The people who agreed. Each line needs a phone number or email. The page counts good lines and warns about problems.	`Jane Smith, (860) 555-0123`. Paste a limited number at a time.	Empty.
What they agreed to, **How they agreed**, **How did they agree?**, **What they agreed to (the words)**, **Date they agreed**	Same as above, applied to every person.	As above.	As above.
Add people who aren't customers yet	Creates customers for people not found.	Tick if wanted.	Off.
This list was bought, rented or given to me by someone else	Flags the list as not your own. A warning is shown.	Tick if true.	Off.

Get ready to text (carrier registration)

Three steps; problems are highlighted before you move on.

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Legal business name	Sent to the carriers.	As on your tax papers.	Empty.
Tax ID (EIN)	Carriers use it to confirm the business. Later only the last four digits are shown.	`12-3456789`.	Empty.
Website	Your site.	`https://…`.	Empty.
Business street address	Your address.	Street, town, state.	Empty.
Contact email	Carrier contact.	An email.	Empty.
What will you text about?	Use case. Options: Updates about visits, quotes and invoices; Updates and offers; Offers and promotions.	Pick one.	Updates about visits, quotes and invoices.
How do customers say yes to texts?	Your opt-in method.	Describe it.	Empty.
A sample text you might send	A sample for review.	One typical text.	Empty.
Next / **Back** / **Send to the carriers**	Move through; the last step submits. Carriers usually answer in a few days.	Click.	

Email sender check

Check my sender (or **Check again**) tests three records on your sending domain and lists each as found or missing, with help text. Marketing email waits until all three pass when the Hub requires it.

Sending rules

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
First hour for texts	Earliest hour marketing texts go out, judged where the customer lives. A blocked text waits.	Pick 12 am to 11 pm.	8 am.
Last hour for texts	Latest hour.	Pick 1 am to 12 am.	9 pm.
Most marketing texts per customer per day	Your own daily limit.	0 to 20.	0 = no limit of your own.
State (two letters) and **Most texts in 24 hours** with **Add a state limit**	Stricter limits for a state. Florida's is built in (marked "built in"). **Remove** deletes yours.	FL and 1 to 50.	Number box 3.
Require email consent too	Off: marketing email goes to customers until they unsubscribe. On: only to people with email consent on file.	Toggle.	Off.
Save sending rules	Saves them.	Click.	

Auto-replies

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Answer HELP	Replies with your business name, phone number and "Reply STOP to opt out". STOP is always honored.	Toggle.	On.
After-hours reply	Sent once when someone texts while you are closed.	Toggle.	Off.
What it says	The reply. Use `{business}`.	A sentence.	"Thanks for your message to {business}. We're away from the phone right now and will text you back when we're open."
Open on / **from** / **to**	Your open days and hours for this reply.	Days and hours.	Monday to Friday, 8 am to 5 pm.
Keyword and **Reply**	When a customer texts exactly the keyword, they get the reply. STOP, HELP, START and YES cannot be used.	`SNOW` and a reply.	None.
+ Add a keyword / **Remove**	Adds or deletes a pair.	Click.	
Words that mean "urgent"	A text containing one is flagged for a person, and the customer is told to call 911 if anyone is in danger.	Comma list.	flood, fire, tree on the house, downed tree, gas leak, injury.
Save auto-replies	Saves.	Click.	

Telling people it's an AI

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
The AI assistant says it is an AI in its first reply	The assistant says it is your AI assistant. Turning it off needs a warning to be read and a box ticked. The assistant never pretends to be a person either way.	Toggle.	On.

A/B test (inside a campaign)

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Version B — email subject	A different subject for group B.	Text.	Empty keeps the same subject.
Version B — text	A different text for group B.	Text.	Empty keeps the same text.
Share of your list in the test	Percent of your list in each of A and B.	10 to 50 in steps of 10.	20%.
The winner is whoever…	How the winner is chosen: Clicked a link, Replied, Opened the email.	Pick.	Clicked a link.
Hours to wait (before sending the winner)	Wait time.	1 to 72.	4.

Steps

1. Open Marketing → Safety. Check **Sending rules** and **Auto-replies**.
2. Record consent for customers who agreed outside VisionScaper, or import a list.
3. Start **Get ready to text** and send it to the carriers.
4. Run **Check my sender** for email.
5. Confirm the checklist once before your first marketing text campaign.

Tips

- Keep the default hours unless your state is stricter.
- Never tick consent for someone who has not agreed.

If something goes wrong

- **Fix the highlighted fields:** a required consent box is empty.
- **A text did not go out:** it may be waiting for the allowed hours.
- **Registration rejected:** use **Fix and send again** and correct the details.

Hub Marketing settings: controls, limits, design, reviews and automations

Every switch and box in the Hub's Marketing controls, sending limits, links, email and text design, review requests and automation modes.

These screens decide what marketing VisionScaper may send for you, how often, when, and how it looks. Numbers shown as defaults are placeholders, not approved; set your own.

Where to find it: Contractor Hub → Marketing & Growth → **Marketing**, then **Automations**, **Reviews** and **Settings**. The AI parts need your plan to include AI marketing.

Before you start

- Your logo, address and phone come from your business profile (see settings-business-profile).
- Text marketing only goes to customers who agreed to texts (see hub-marketing-safety-consent-and-auto-replies).

Automations

Each automation has a toggle (with a short "when" line) and, when on, a choice **Autopilot** or **Ask me first**. Two buttons set all at once: **All on Autopilot** and **Ask me first for all**. The Review automation shows **Review settings →** instead. Defaults for each automation are on (see "What can go out" below).

Settings: Everything at once

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Pause ALL marketing (`controls.paused`)	Campaigns, automations, review requests and AI replies wait. Essential messages about appointments are described on screen as continuing.	Toggle.	Off.

Settings: What can go out

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Email marketing	Allows marketing email.	Toggle.	On.
Text marketing	Allows marketing texts, only to customers who agreed.	Toggle.	On.
AI writes and personalizes messages	Lets AI write wording.	Toggle.	On.
AI replies to customers who answer	Options: Off; Draft it for my OK; Answer simple "yes / interested" replies itself.	Pick one.	Draft it for my OK.
Reply to new leads instantly	Instant first reply to a new lead.	Toggle.	On.
Follow up on estimates	Follow-up messages on sent quotes.	Toggle.	On.
Win back lost & expired estimates	Messages to lost or expired quotes.	Toggle.	On.
Review requests	Asks happy customers for reviews.	Toggle.	On.
Referral requests	Asks for referrals.	Toggle.	On.
Seasonal service reminders	Season-based reminders.	Toggle.	On.
Recurring service reminders	Reminders for repeat services.	Toggle.	On.
Reactivate inactive customers	Messages to inactive customers.	Toggle.	On.
Upsells & cross-sells	Suggests extra services.	Toggle.	On.
Reminders & group-posting alerts to me	Reminders to you, including group-posting alerts.	Toggle.	On.

Settings: Missed-call text-back

Shown with your VisionScaper number. Otherwise a note says to ask the site owner for a number, or "Not available on this site yet."

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Text back missed calls	Texts the caller right away when nobody answers.	Toggle.	Off.
Ring this phone (placeholder "Your cell, e.g. (860) 555-0199")	The phone that rings first.	Your cell.	Empty.
Greeting (placeholder "Optional voicemail greeting")	Voicemail greeting.	A sentence.	Empty.
Take voicemails	Lets callers leave a voicemail.	Tick.	On.
Save	Saves these.	Click.	

Settings: Limits & sending hours

Each box saves when you change it. A message that would break a limit waits until allowed, and is dropped after two weeks. 0 means no limit.

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
At most N marketing message(s) per customer per week	Weekly cap per customer.	0 to 7.	1 (placeholder, not approved).
…and N per month	Monthly cap per customer.	0 to 31.	4 (placeholder, not approved).
At least N hours between marketing messages to the same customer	Minimum gap.	0 to 720.	48 (placeholder, not approved).
Send at most N messages a day in total	Daily cap for the whole business.	0 to 5000.	200 (placeholder, not approved).
Marketing goes out on	Days allowed.	Pick days.	Monday to Saturday.
between … and …	Hours marketing may go out.	6 am to 10 pm.	9 am to 7 pm.
Never text customers between … and …	Quiet hours for texts.	Any hours.	9 pm to 8 am.
A customer is "inactive" after N months without work	Defines "inactive" for reactivation.	3 to 48.	12.
Credit a booked job to marketing sent within N days before it	How far back a booking counts as caused by marketing.	1 to 180.	30.

Settings: Links & offers

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Online booking link	Used by `{booking_link}` and the "Book online" button.	`https://…`.	Empty.
Referral reward	Mentioned in referral requests.	"$50 off your next service". Leave empty for none.	Empty.
Referral link	Where referrals go.	Optional.	Defaults to your VisionScaper page.
Saved offers (rows, **Remove** X, add button)	Offers the AI may use. It never makes up discounts.	"$25 off when you book by Oct 31".	None.
Save	Saves.	Click.	

Settings: Your emails & texts, your style

A live preview of an email and a text sits beside the boxes.

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Layout / **Font**	Overall email layout and font (lists come from the server).	Pick.	classic / system.
Buttons & header, **Accent (offers, stars)**, **Background**, **Text**	Colors.	Pick colors.	#1f7a46, #f4b740, #f3f6f4, #1d2a22.
Buttons	Rounded pill, Soft corners, Square.	Pick.	Rounded pill.
Alignment	Left or Centered.	Pick.	Left.
Logo width (px)	Logo size.	60 to 280.	150.
Banner photo (optional)	A banner image address.	`https://…`.	Empty.
Show my business name next to the logo	Shows the name.	Tick.	On.
Show my social links in the footer	Shows links.	Tick.	On.
Email signature	Closing text.	A few lines.	(not verified default).
Footer line (placeholder "Optional line above the footer, e.g. licensed & insured · CT HIC #0000000")	Extra footer text.	Short text.	Empty.
Start every text with	Carriers expect your business name in every marketing text.	Text.	`{company_name}:`.
End every text with	A closing line.	Optional, such as "– David".	Empty.
Save design	Saves; all marketing uses it.	Click.	

Reviews

Where reviews go:

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Google	Your Google review link or Place ID. In Google Business Profile use "Get more reviews" and copy the link.	`https://g.page/r/…/review` or a Place ID.	Empty.
Facebook	Your Facebook reviews page.	`https://facebook.com/yourpage/reviews`.	Empty.
Another site — name / link	Any other site.	"Houzz" and its link.	Empty.
Also offer a VisionScaper review (with photos)	Offers a VisionScaper review.	Toggle.	On.
Save links / Test … ↗	Saves; opens each link.	Click.	

When to ask:

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Review requests are on	Master switch for automatic requests.	Toggle.	On.
When a job is marked Done	Ask when a job is done.	Toggle.	On.
When the final invoice is paid	Ask when paid.	Toggle.	On.
During maintenance — after every N completed visits	Ask after repeated visits.	Toggle and 1 to 20.	Off; 4.
Wait N days after the job before asking	Delay.	0 to 30.	2.
Send by	Best channel, Text or Email.	Pick.	Best channel.
One reminder if they don't answer, after N days	A single nudge.	Toggle and 1 to 30.	On; 5.
Don't ask the same customer more than once every N days	Spacing.	1 to 730.	180.
Alert me right away about ratings of 3★ or less	Alerts you.	Toggle.	On.
Find a customer… (Ask anyone)	Search to send a one-off request.	Type 2+ characters.	Empty.

Editing the words of a message

Opening an automation's message shows **Email subject**, **Email** and **Text message** boxes, tag buttons, **Save wording** and **Back to the default**.

Steps

1. Open Marketing → Settings. Review **What can go out** and switch off what you do not want.
2. Set **Limits & sending hours**.
3. Fill **Links & offers**, then **Save**.
4. Set the design and click **Save design**. Check the preview.
5. In Reviews, paste your Google link and click **Save links**.
6. In Automations choose Autopilot or Ask me first per automation.

Tips

- Start with **Ask me first** until you trust the wording.
- Use **Pause ALL marketing** if you need a quick stop.

If something goes wrong

- **A message did not send:** it is waiting for a limit or the allowed hours.
- **Missed-call text-back is missing:** you have no VisionScaper number yet.
- **Save fails:** read the red toast; a value outside its range is rejected.

Field work Settings tab: hours, late jobs, photos, job costing and alerts

Every field on the Field work Settings tab: time zone, week start, forgotten timers, activity list, late jobs, photo rules, job costing and alerts.

This tab sets how clock-in time is counted, when a job counts as late, whether photos are required, and how job costs are worked out.

Where to find it: Contractor Hub → Schedule & Field → **Field work** → **Settings** tab. Only the **owner** can open it. Anyone else sees "Only the owner can change these."

All changes are saved together with one **Save settings** button at the bottom.

Time & hours worked

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Company time zone (`tz`)	Days and weeks of hours worked are cut in this time zone.	Pick a US zone: New York, Chicago, Denver, Phoenix, Los Angeles, Anchorage, Honolulu or Puerto Rico.	"Website's time zone (…)" shows your site's zone.
Week starts on (`week_start`)	The first day of the week for hours and weekly totals.	Monday, Sunday or Saturday.	Monday.
Close forgotten timers after (hours) (`auto_close_hours`)	A clock-in left running this long is closed at the last known time and flagged for review. It is never closed at a guessed time.	2 to 24.	12.
What people clock in for: activity name box	The names offered when someone clocks in.	Edit a name, such as "Shop / yard".	Job work, Travel, Loading / prep, Shop / yard, Break, Other.
Paid (checkbox on each activity)	Whether that activity counts as paid time.	Tick if paid.	Job work, Travel, Loading / prep, Shop / yard and Other paid; Break unpaid.
Counts as job cost (checkbox)	Whether that time is added to a job's labor cost. Job work and Break are locked.	Tick if it belongs on jobs.	Job work, Travel and Loading / prep on; Shop / yard, Break and Other off.
Remove (link)	Deletes an activity. Not available for Job work or Break.	Click.	
+ Add activity	Adds a row named "New activity" (paid, not a job cost).	Click, then rename it.	

Jobs

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
A job is "late" after (minutes) (`overdue_minutes`)	A job not started this long after its start time is marked late.	5 to 240.	30.
Crew-finished jobs wait for a manager's approval (`require_approval`)	A crew's finish is held until a manager approves.	Tick to require.	Off.
A "before" photo is required to finish a job (`require_before`)	The crew must add a before photo to finish.	Tick to require.	Off.
An "after" photo is required to finish a job (`require_after`)	The crew must add an after photo to finish.	Tick to require.	Off.

Finishing a job never charges the customer. A service template set to "create a draft invoice" makes a draft you review and send yourself.

Job costing

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Count materials (`materials_basis`)	Which materials count toward a job's cost. Options: Used on the job; Bought for the job.	Pick one.	Used on the job.
Show an overhead allocation (your overhead % from Settings → Costs) (`include_overhead`)	Adds an overhead share to job costs using the overhead percent from your Costs settings.	Tick to show.	Off.
Warn when labor passes the estimate by (%) (`over_budget_pct`)	Flags a job when actual labor hours exceed the estimate by this percent.	0 to 200.	10 (placeholder, not approved; set your own).
Your own cost per hour ($) — for jobs you work yourself	Your cost rate when you work a job. Blank means the company labor rate from Settings → Costs.	A number such as 45.00.	Blank ("Company rate").

Alerts

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Managers get field alerts too (late, blocked, finished jobs, hours worked…) (`alert_managers`)	Sends managers the same operational alerts as you.	Tick or untick.	On.
Tell employees when their schedule changes (`notify_crew`)	Notifies linked employees when their schedule changes.	Tick or untick.	On.

The wording, channels and on/off of each alert are in Settings → Messages → Field operations (see settings-messages-and-alerts-catalog).

Steps

1. Open Field work → Settings (as the owner).
2. Pick the **Company time zone** and **Week starts on**.
3. Review the activity list. Untick **Paid** for unpaid activities and decide **Counts as job cost** for each.
4. Set the late minutes and tick any photo or approval rules you want.
5. Choose how materials count, and set your own cost per hour if you work jobs.
6. Click **Save settings**. Look for "Saved."

Tips

- Change the week start before payroll week begins, not mid-week.
- Add a separate activity for training or meetings so it does not land on job costs.

If something goes wrong

- **Settings tab is missing:** you are not signed in as the owner.
- **Hours land on the wrong day:** check **Company time zone**.
- **Timers close at odd times:** the entry is closed at the last known time and flagged; review it in Hours.

Community: the Needs review table

Review hidden or reported posts and comments, then Keep, Remove or Ban the member.

Find it under **Settings → VisionScaper Community → Needs review**. It lists up to 50 posts and comments that are hidden, or live with at least one report, most-reported first. Only users who can manage options (WordPress administrators) can open this screen.

If nothing needs attention it says "Nothing to review."

Columns

Column	What it shows
What	A small picture (if any) and "Post:" or "Comment:" followed by the first 120 characters.
Member	The author's display name and email. A dash if the account no longer exists.
Reports	How many reports the item has.
Reasons	Up to 5 open report reasons, separated by " · ".
Status	live or hidden.
Action	The buttons below.

Fields (buttons)

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Keep (it's fine) `do=keep`	Sets the item back to live, resets its report count to 0 and marks its open reports as done.	Click. Message: "Restored and reports dismissed."	No confirmation.
Remove `do=remove`	Sets the item to removed and marks its reports done.	Click, then OK on "Are you sure?" Message: "Removed."	Removed items no longer appear in Latest posts.
Ban member `do=ban`	Marks the author as banned and hides all their live posts.	Click, then OK. Message: "Member banned and their posts hidden."	Not shown if the author account is gone. Administrators cannot be banned.

Steps

1. Open the screen and look at the **Reasons** column.
2. If the item is fine, click **Keep (it's fine)**.
3. If it breaks your rules, click **Remove** and confirm.
4. If the member keeps causing trouble, click **Ban member** and confirm.
5. Confirm the green message appears and the row disappears (a banned member's other rows may stay if they were comments).

Tips

- Keep clears reports, so a member cannot keep an item flagged forever.
- Banned members can still design, but cannot post, comment, like or message.

If something goes wrong

- No change after clicking: the link may have expired. Reload and try again.
- To undo a ban, use Unban under Members (community-members-points).

Landscape plan wizard: customer, scope, measurements, scale, site details and style

Every input in the Landscape plans wizard steps 1, 2, 5, 7 and 8, plus the typed measurements and survey scale boxes.

The Landscape plans wizard builds a measured 2D plan in ten saved steps: 1 Customer & property, 2 What to plan, 3 Bird's-eye base map, 4 Trace the property, 5 Check the scale, 6 Site photos, 7 Site details, 8 Style, 9 Designs and 10 Generate & review. It saves as you go, on this device and on the property, so you can start in the office and finish on site.

Where to find it: Contractor Hub → Design Studio → **Landscape plans**, then **New landscape plan**. Your plan must include the Landscape plans tool (a tool you can switch on or off in "Show me" settings). This article covers the typed inputs. Steps 3, 4, 6, 9 and 10 are mostly drawing, photo and button steps and are listed as not covered in detail.

Plan list

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Search plans (placeholder "Search customer or address")	Filters your saved plans.	A name or address.	Empty.
New landscape plan (button)	Starts the wizard.	Click.	

Step 1: Customer & property

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Search customers (placeholder "Search your customers")	Finds the customer.	A name.	Empty.
+ New customer	Opens a small form (below).	Click.	
Property list	Picks the address the plan is for. It must be a full street address with house number, town and state, because the wizard uses it to find the property from above.	Click one.	The footer says "Choose a customer." until you do.

New customer form

Field	What it does	What to enter	Notes
Name	The customer's name.	Full name.	
Mobile	Phone.	A number.	
Email	Email address.	A valid email.	
Street address (placeholder "123 Main Street")	Property address with suggestions.	Street.	
Town	Town.	Town.	
State	State.	Pick.	Starts at your region's state.
ZIP	Postal code.	Up to 10 characters.	

Step 2: What to plan

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Which parts of the property?	The areas the plan designs. The whole property is always measured. Each area gets its own guided photos. Options: Front yard, Back yard, Left side yard, Right side yard.	Click each area (several allowed).	None. You must pick at least one: "Pick at least one area."
What kind of job?	Options: New landscape, Renovation, Refresh (plants & mulch).	Pick one.	Refresh turns off walkway and patio.
Include	Options: Walkway & patio; Privacy screen at the back. Planting beds and plants are always included.	Click each you want.	Set by your earlier choice.

Typed measurements (when you have no map)

Use feet, or feet and inches like `32' 6"`. This is for square lots and houses only. For anything else use a survey or the bird's-eye view.

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Lot width (along the street)	The front property line length.	`100`.	Empty.
Lot depth	How deep the lot is.	`150`.	Empty.
House width	Across the front of the house.	`48`.	Empty.
House depth	Front to back.	`30`.	Empty.

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Front of lot → house	Distance from the front property line to the house.	`40.`	Empty.
Left line → house	Distance from the left property line to the house.	`25.`	Empty.
Driveway side	Which side the driveway is on: Left, Right, None.	Pick.	
Driveway width	Driveway width.	`12.`	

Survey scale

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Length on the survey (feet)	After you tap both ends of a property line that has its length written on the survey, this sets the drawing's scale.	`100.00` or `85' 6"`.	Empty.

Step 5: Check the scale

Aerial pictures are very close to scale, but one real measurement proves it and corrects the plan. Do not use the house: its roof overhangs, so it looks bigger from above.

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
What did you measure?	Names the flat thing you measured. Options: Driveway width (at the street); Front walk / sidewalk width; An edge of a patio or deck; A straight fence run; Driveway length; Something else flat on the ground.	Pick one.	None.
Tape measurement (placeholder "e.g. 11' 8" or 11.7")	The real length. Measure at least 8 ft.	`11' 8"` or `11.7`.	Empty.
I can't measure on site right now — skip (less accurate)	Skips the check after you confirm. The plan is marked less accurate.	Click only if needed.	

Step 7: Site details

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
USDA hardiness zone	Limits plant choices to what survives the winter.	Pick "Zone 3a" to "Zone 11a".	"Choose…", or auto-filled when found.
Sun for each area	Sun hours per area you chose. Options: Full sun (6+ hrs), Part (3–6 hrs), Shade (under 3).	Watch on site or ask the customer.	None.
Lowest front window sill height (ft)	Ground to the bottom of the lowest window behind the front beds. Foundation plants are kept below it.	3.	Empty.
Deer visit this property (use deer-resistant plants)	Picks deer-resistant plants.	Tick.	Off.
Prefer native plants	Favors native plants.	Tick.	Off.
Drainage	Options: No problems; Wet / soggy spots; Water runs toward the house; Erosion / washouts.	Pick.	None.
Slope check (button, shown when the property location is known)	Looks up the slope and the downhill direction and shows the result.	Click.	
Irrigation	Options: None; Has a system; Customer wants one.	Pick.	None.
I'll call 811 to mark underground utilities before digging (required by law in every state)	Records that you will.	Tick.	Off.
Maintenance they want	Options: Low; Some; Loves gardening.	Pick.	None.
Budget (optional)	The customer's budget.	$8–12k.	Empty.
Keep	Plants, beds or features to keep.	Text.	Empty.
Remove	What comes out.	Text.	Empty.
Wishes	Colors, favorite plants, things to avoid, how they use the yard.	Text.	Empty.
HOA or town rules (optional)	Local rules.	Text.	Empty.

The footer lists problems in red ("bad"), yellow ("warn") and green; fix red items before the next step.

Step 8: Style

Each style card shows how many library plants fit this site (zone, sun, deer) and warns if few fit or if part of the site is too shady. The star marks a suggested style that fits the site and the maintenance they want. Options: Traditional, Modern, Cottage garden, Native & pollinator, Drought-tolerant, Japanese, Formal, Low maintenance. Click one to choose it.

Steps

1. Open Landscape plans → **New landscape plan**.
2. Pick the customer and the full property address.
3. Tap the areas, the job kind and the extras.
4. Do the base map and tracing steps, then the tape check in step 5.
5. Add site photos, then fill in Site details.
6. Choose a style, then continue to Designs and Generate & review.

Tips

- Measure on site early; it corrects the whole plan.
- A full street address with the town and state helps the wizard find the property.

If something goes wrong

- **"Choose a customer." / "Pick at least one area."** Fix that step before Next.
- **Property not found from above:** check the address is complete.
- **Plan marked less accurate:** you skipped the tape check; redo step 5 on site.

Community: the Latest posts table

Hide, restore or remove the 30 newest community posts.

Find it under **Settings → VisionScaper Community → Latest posts**. It lists the 30 newest posts that are not removed. Only users who can manage options (WordPress administrators) can open this screen.

Columns

Post (thumbnail and title; help requests start with "[Ask for ideas]"), Member (display name), Likes, Rating (average and, in brackets, the number of ratings, or a dash), Comments, Status, Action.

Fields (buttons)

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Hide `do=hide`	Sets a live post to hidden so members stop seeing it. It then appears in Needs review.	Click.	Only shown when the post is live.
Restore `do=keep`	Sets the post to live, resets reports to 0, dismisses its reports.	Click.	Shown instead of Hide when the post is not live.
Remove `do=remove`	Sets the post to removed and dismisses its reports.	Click, then OK on "Are you sure?"	Removed posts leave this list.

Steps

1. Open the screen and scan the thumbnails and titles.
2. To pull a post while you decide, click **Hide**.
3. To bring it back, click **Restore**.
4. To get rid of it, click **Remove** and confirm.
5. Check the green message at the top.

Tips

- Hide is gentler than Remove. Use it when unsure.

If something goes wrong

- A post you expect is missing: only the newest 30 show, and removed posts are never shown.

Marketing reminders: group-posting rules (Add a group)

Every box in the Add a group form that reminds you when a Facebook or Nextdoor group allows business posts.

Where to find it: Contractor Hub → Marketing & Growth → Marketing → **Reminders** tab → **Add a group** (or **Edit** on a group card). The screen is for the owner and anyone who can open Marketing.

Many local Facebook groups and Nextdoor areas only allow business posts on certain days. Add each group once. VisionScaper then reminds you on the allowed days and gives you a one-tap "copy the post and open the group" helper. VisionScaper does not post for you.

Before you start

- Open the group in your browser and copy its address.
- Read the group's rules for businesses. You will paste a short version into the form.
- Turn on **Reminders & group-posting alerts to me** in Marketing → Settings. When it is off, no alerts are sent.

Fields

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Group name (`group_name`)	Names the group on cards, in alerts and in the lead log ("Came from your post in …").	The group's name. Example: `Farmington Community Board`.	Empty. If empty, the Title is used.
Where (`platform`)	Picks the icon and the wording in alerts.	Pick one: Facebook group, Nextdoor, Instagram, Craigslist, Other.	Facebook group.
Link to the group (`url`)	The address that "Copy post & open group" opens in a new tab.	Paste the group address. Example: `https://www.facebook.com/groups/….`	Empty. The helper cannot open anything without it.
Group rules (for your reference) (`rules`)	Shown on the group card and in the post helper so you can check the rules before you post. It does not change the schedule.	Paste the rule. Example: "Business posts on Thursdays only. One per week. No links in comments."	Empty.
Business posts allowed on (`rule.days`)	Chooses the weekdays that count as posting days. The next reminder is the next chosen day.	Tap Sun to Sat buttons. Several are allowed.	Thursday.
Posts allowed from (`rule.time`)	The time of day the posting day begins.	A clock time. Example: `09:00`.	09:00.
Remind me (`rule.alert`)	When the alert goes out.	Pick **The morning of**, **The evening before** or **Both**.	The morning of.
Evening before at (`rule.before_time`)	Time of the evening-before alert. Shown for "The evening before" and "Both".	Example: `19:00`.	19:00.
Morning of at (`rule.alert_time`)	Time of the morning alert. Shown for "The morning of" and "Both".	Example: `08:00`.	08:00.
Post … time(s) a week (`rule.per_week`)	How many posts the group allows each week. Once you have posted that many in a week, the rest of that week is skipped.	A number from 1 to 7.	1.
every … week(s) (`rule.every_weeks`)	Posts only every Nth week.	A number from 1 to 8. Example: 2 for every other week.	1.
Your post (`content`)	The main post text. You can use `{link}` (a tracked link to your website that counts clicks and the leads from this group) and `{join_link}` (your text-list sign-up page).	Write the post.	Empty.
Version 2, Version 3 … (extra post versions) (`variants`)	Extra wordings. The helper rotates through your post and these versions so the group does not see the same post every week.	Type another version. Each is a separate box.	None.
+ Add another version	Adds an empty extra version box.	Click.	
Remove (under a version)	Removes that version.	Click.	
✨ **Write a fresh version with AI**	Asks the AI to write another version and adds it to the list.	Click. Save the group first; before that it says "Save it first, then AI can write alternates."	Needs the AI to be available for your site.
Photos to add to the post (`photos`)	Photos you can save to your phone from the helper and add to the post in the group.	Choose up to 6 pictures, each under 6 MB. Larger ones are refused with "Photos must be under 6 MB."	None.
Remove photo (× on a thumbnail)	Takes that saved photo off the group.	Click.	
Alert me by (`channels`)	Where the alert arrives.	Tap any of **In the app**, **Email**, **Text me**.	In the app and Email.
Add group / **Save**	Saves the group and shows "Saved — next reminder ."	Click.	
Delete	Deletes the group and its history after you confirm. Only shown when editing.	Click.	

Steps

1. Open Marketing → Reminders and press **Add a group**.
2. Fill **Group name**, **Where** and **Link to the group**.
3. Paste the group's business rules into **Group rules (for your reference)**.
4. Tap the allowed weekdays under **Business posts allowed on** and set **Posts allowed from**.
5. Choose **Remind me**, then the alert times that appear.
6. Set how many posts per week and how many weeks apart.
7. Write **Your post**. Add a second and third version with **+ Add another version**.
8. Add photos if you want, and choose **Alert me by**.
9. Press **Add group**. A message tells you the date of the next reminder.

To check it worked, see the group card. It shows "Allowed: …", the next posting day, and "last posted never".

Tips

- Use `{link}` in the post. The card then shows "link clicks" and leads from that group are logged.
- Keep three or four versions. They rotate in order.
- The card shows a "Post day" tag on days you may post.

If something goes wrong

- No alerts arrive: check **Alert me by** and the Marketing → Settings switch for group-posting alerts.
- "Photos must be under 6 MB." Use a smaller picture.
- The helper opens nothing: the **Link to the group** box is empty.

Marketing reminders: personal reminders and the post helper

Every box in New reminder and in the Copy post and open group helper, with repeat rules and early-reminder choices.

Where to find it: Contractor Hub → Marketing & Growth → Marketing → **Reminders** tab. Press **Add a reminder** for a personal reminder, or 📋 **Copy post & open** on a group that is due.

Personal reminders are for things you must not forget: insurance renewals, weekly social posts, calling suppliers, checking on a job. They can happen once or repeat. The post helper opens a group-posting reminder, lets you edit the text and copies it.

Fields: New reminder / Edit reminder

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
What (`title`)	The name shown on the list and in the alert.	Example: `Renew insurance certificate`.	Empty.
Repeat (`rule.type`)	How often the reminder fires.	Pick **Once**, **Daily**, **Weekly**, **Monthly**, **Yearly** or **Every N days**.	Once.
Date (Once) / **Starting** (Monthly, Yearly, Every N days) (`rule.date`)	The day it happens, or the day the repeat starts. Monthly uses the day of the month; Yearly uses month and day.	Pick a date.	Today.
On (Weekly) (`rule.days`)	The weekdays it repeats on.	Tap Sun to Sat. Several are allowed.	Today's weekday.
Every … days (`rule.every`)	The gap for "Every N days".	A number from 1 to 365.	7.
At (`rule.time`)	Time of day.	Example: `09:00`.	09:00.
Until (optional) (`rule.end`)	The last day a repeating reminder runs. Not shown for Once.	Pick a date or leave empty.	Empty (no end).
Remind me early (`rule.lead`)	Sends the alert before the set time.	Choose **At that time**, **15 minutes before**, **1 hour before**, **1 day before** or **1 week before**.	At that time.
Notes (`notes`)	Extra detail shown under the reminder and in the alert (first 300 characters).	Free text.	Empty.
Link (optional) (`url`)	A link shown on the reminder.	A web address.	Empty.
Alert me by (`channels`)	Where the alert goes.	Tap **In the app**, **Email**, **Text me**.	In the app and Email.
Add reminder / **Save**	Saves and tells you the next reminder time.	Click.	
Delete	Deletes the reminder and its history after you confirm.	Click.	

Fields: cards and buttons on the Reminders tab

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
📣 **Add a group** / ⏰ **Add a reminder**	Opens the group form or this form.	Click.	
✓ **Done**	Marks a due personal reminder done. A repeating one moves to its next date.	Click.	Shown only when due.
✏️ **Edit**	Reopens the form.	Click.	
⏸️ **Pause** / ▶️ **Resume**	Stops or restarts a group's reminders without deleting it.	Click.	

Fields: the post helper

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Your post (edit if you like) (`post_now`)	The text that will be copied. It is the next version in the rotation with the tracked link filled in. Edits here are for this copy only.	Change the wording if you like.	The next version.
📋 **Copy post & open the group**	Copies the text and opens the group address in a new tab. Paste it there.	Click, then press and hold → Paste.	
Optional: paste the link to your post (`post_url`)	Keeps the address of the post you made.	Paste the address of your post.	Empty.
✅ **Yes, I posted it**	Records the post, adds one to the post count and moves to the next day.	Click after posting.	
Remind me in an hour	Snoozes the reminder for one hour.	Click.	
Already posted	Shows the "Posted it?" box without copying.	Click.	
Skip this time	Skips this posting day.	Click.	
Photo thumbnails	Each downloads as a file so you can add it to the post.	Click a photo, save it, add it in the group.	

Steps

1. Press **Add a reminder**.
2. Type **What**, choose **Repeat**, and set the date, weekdays or number of days.
3. Set **At**, and an end date if the reminder should stop.
4. Choose **Remind me early** and **Alert me by**.
5. Press **Add reminder**.
6. When a group is due, press **Copy post & open**, paste in the group, return and press **Yes, I posted it**.

If something goes wrong

- "That reminder is gone." The reminder was deleted on another device.
- "Opened the group. Copy the post from here if it didn't paste." Your browser blocked copying; select the text and copy it yourself.

Marketing campaigns: template picker, Insert detail, blocks and design extras

The New campaign picker and the extra boxes in the campaign editor: alt text, link, offer, banner photo, AI brief and design choices.

Where to find it: Contractor Hub → Marketing & Growth → Marketing → **Campaigns** tab → **New campaign**. This article adds the boxes that the main campaign form article does not describe. For audience filters, A/B test and the schedule, see the campaign form article (hub marketing campaign and automation forms).

Campaigns need the full Marketing level. If your plan has less, the tab shows a lock note and you can still message from Today, send review requests and set reminders.

Before you start

- Add your services in the Hub so the "Seasonal service" template can name one.
- Your default look is set in Marketing → Settings. The editor lets you change it for one campaign.

Fields: New campaign picker

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
For "Seasonal service": which service? (`svc`)	Names the service in the Seasonal service template and limits the audience to people who had that service.	Pick one of your services. If you click the Seasonal service card without choosing, you see "Pick the service first."	"Pick a service..."
Template card **Seasonal service**	Starts a text-if-allowed-else-email campaign to past customers.	Click.	Needs the service above.
Template card **Seasonal newsletter**	Email with seasonal tips.	Click.	
Template card **Last few openings**	Text-if-allowed-else-email message about schedule gaps; audience is people with a job in the last 730 days.	Click.	
Template card **Win-back offer**	Email to prospects and lost customers with no open estimate.	Click.	
Template card **Referral program**	Asks customers who rated you 4 or better to refer a neighbor.	Click.	
Template card **Maintenance plan**	Email to customers who have not had maintenance.	Click.	
Template card **Thank-you / holiday note**	A no-ask email to customers and past customers.	Click.	
Template card **Start from scratch**	Empty message.	Click.	The campaign is named "My campaign — ".

Each card creates a draft you can change. Nothing is sent until you approve.

Fields: message and design extras

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
{ } Insert detail (button, beside Text and Text message boxes)	Opens a list of details that VisionScaper fills in for each customer. Clicking one inserts it where the cursor is.	Choose from: Customer's first name, Their town, Your business name, Your name, Your phone, The service, Their last service, When it was, This season, Your offer, Booking link, Review link, Referral link. Add a fallback after a bar, for example `{customer_first_name|there}`.	The preview warns if a detail is empty for the sample customer.
What's it for? (AI writer brief, `purpose`)	The goal the AI writes from.	Example: "fill our fall cleanup schedule, mention we're booking now".	If empty, the campaign name is used.
✨ **Write it for me**	Writes three versions. Click one to put its subject, preview text, email text and text message into the form.	Click, then pick.	AI never invents offers.
Optional offer (`message.codes.offer`)	Fills `{offer}` and `{offer_line}` wherever they appear.	Example: `$25 off when you book by Oct 31.`	Empty.
Preview text (`preheader`)	The grey line after the subject in the inbox.	A short line.	Empty.
Text message (`sms`)	The SMS body.	One clear question or next step.	Empty. A bubble shows segments and characters.
Button text / **Link** (Button block)	The label and address of the button.	Link can be a web address or `{booking_link}`.	"Book now" and `{booking_link}`.
Picture (Image block, file)	Uploads a picture into the email.	A picture under 6 MB, else "Pick a picture under 6 MB."	None.

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Picture link	Uses a picture from the web instead.	`https://…`	Empty.
Describe it (for screen readers) (`alt`)	Alt text read aloud for people who cannot see the picture, and shown if the picture does not load.	Example: "Front walk after fall cleanup".	Empty.
Opens (optional) (`link`)	Where the picture goes when clicked.	`https://…`	Empty.
Who (first name & town) (Review quote block)	The attribution under a quote.	Example: `Pat, Avon`.	Empty.
Layout (`design.layout`)	The email's look: Classic, Modern, Card, Personal, Bold.	Pick one.	Your Marketing settings default.
Font (`design.font`)	Email font: Clean (system), Arial, Verdana, Trebuchet, Georgia, Garamond, Montserrat, Open Sans, Lora, Merriweather, Poppins.	Pick one.	Your default.
Button & accent color (`design.brand`)	Color of buttons and links.	Pick a color.	Your default.
Banner photo (`design.hero`)	A banner picture address for the top.	`https://…` (optional).	Empty.

Fields: after the campaign is approved

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
⏸️ **Pause** / ▶️ **Resume**	Holds or restarts a campaign that is sending or scheduled.	Click.	
✖️ **Cancel the rest**	Stops messages not yet sent, after you confirm.	Click.	
📄 **Duplicate**	Copies it into a new draft.	Click.	
🗑️ **Remove from list**	Removes a sent or cancelled campaign from the list.	Click.	
Recipients (arrow)	Lists each person and status (sent, opened, clicked, replied).	Open to read.	

Steps

1. Press **New campaign**. If you want Seasonal service, choose the service first.
2. Click a template card. The editor opens.
3. Under Message, type a goal in **What's it for?** and press **Write it for me**, or edit the text yourself.
4. Use **{ } Insert detail** for names and links.
5. Open **Design for this campaign** to change layout, font, color and banner.
6. Press **Send me a test**, then **Approve & send**.

If something goes wrong

- "Pick the service first." Choose a service before clicking Seasonal service.
- "Nobody in this audience can be reached yet — widen the filters or pick another channel."
- A yellow line lists empty details. Add a fallback such as `{customer_first_name|there}`.

Marketing consent tab: sign-up link, search, ask by text, paste a list, proof

Every control on the Consent tab: the join link and QR code, search and filters, Ask selected by text, bulk paste and proof of consent.

Where to find it: Contractor Hub → Marketing & Growth → Marketing → 👥 **Consent** tab. The owner and anyone with Marketing access can open it.

Marketing texts need each customer's written OK. Emails can go until the customer unsubscribes. This tab shows who has agreed, lets you ask people, and keeps proof. The single-customer "Record consent" form is described in the safety and consent article; this article covers everything else on the tab.

Before you start

- Text marketing also needs your sender approval on the Safety tab.
- Consent cannot come from a list you bought or were given. The paste form asks you to say so.

Fields: the "Get permission to text" card

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Sign-up link (read-only box)	Your public page where people tick that they want seasonal reminders and offers by text.	Read it; use the buttons.	Generated for your site.
📋 **Copy sign-up link**	Copies the link so you can put it on your website, invoices and group posts.	Click.	
🔳 **QR code**	Shows a QR code for the link titled "Scan for seasonal reminders & offers".	Click, then 🖨️ **Print** or ⬇️ **Download** (saves `qr-code.svg`).	
The consent wording customers agree to (arrow)	Shows the exact words people agree to.	Open to read.	Read-only.

Fields: the list

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Search name, phone, email, town… (`q`)	Filters the list. It searches when you leave the box (press Enter or click away).	Type part of a name, phone, email or town.	Empty.
Filter chips (`filter`)	Show only one group.	**All**, ✅ **Text OK**, **— No text consent**, 🚫 **STOP**, 📪 **Unsubscribed**, ⚠️ **Bounced**, 🔕 **No marketing**.	All.
Tick box beside a customer (`ids`)	Selects a customer to be asked for text consent. Only shown for customers with a phone and no text consent yet.	Tick the people to ask.	Unticked.
💬 **Ask selected by text**	Sends one text asking whether they want seasonal reminders and offers by text (reply YES). It confirms first. Each person is asked only once.	Click after ticking; the button counts "Ask 3 by text".	Off until at least one is ticked. A result lists anyone skipped and why.
Proof of consent / **Proof (n)** (arrow)	Shows each consent record: channel, how, date, who recorded it, the words, any note and file.	Open to read.	"No consent on file." when none.
View proof	Opens the uploaded proof file.	Click.	
Withdraw	Ends that consent after you confirm. The person stops getting that kind of marketing. The record stays.	Click.	
No mobile / status chips	Read-only status for text, email and "off".	Read.	

Fields: Record consent you already have

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
➕ **Record consent for one customer**	Opens the one-customer form (see the safety and consent article).	Click.	
📋 **Paste a list of customers**	Opens the list form below.	Click.	
People (`lines`)	One person per line: phone, email, name, in any order. A preview shows how many lines have a phone or email and flags bad lines.	Example: `Jane Smith, (860) 555-0123`. Up to 500 lines at a time.	Empty.
What they agreed to (`channels`)	Which channels the list agreed to.	Tick **Texts** and/or **Emails**.	Texts.
How they agreed (`source`)	The way consent was given.	Pick: Agreed on a phone call, Signed quote or contract, Paper form, Website sign-up form, Agreed in person, Replied YES / START by text, Other (say how).	Choose… (required).
How did they agree? (`note`)	Shown only for **Other**.	Describe it.	Empty.

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
What they agreed to (the words) (`wording`)	Kept as proof for every person.	Edit the generated sentence if your form said something different.	Generated from your business name and channels.
Date they agreed (`given`)	The date on the record. Cannot be in the future.	Pick a date.	Today.
Add people who aren't customers yet (`create_missing`)	Creates a customer for lines not found.	Tick if needed.	Off.
This list was bought, rented or given to me by someone else (`purchased`)	Marks the list as one that cannot give consent; saving is refused.	Tick if true.	Off.
Save consent for this list	Records consent. A summary shows how many saved, created, unmatched and skipped.	Click.	

Steps

1. Open the Consent tab and press 📋 **Copy sign-up link** to share your sign-up page.
2. To ask existing customers, use the **— No text consent** chip, tick people, press 💬 **Ask selected by text**, then **Send**.
3. To record agreements you already hold, press 📋 **Paste a list of customers**, fill the form and press **Save consent for this list**.
4. Open **Proof of consent** on any customer to check the record.

If something goes wrong

- "Paste at least one person." The People box is empty.
- "Paste 500 or fewer at a time." Split the list.
- A customer has no tick box: they have no phone, or they already have text consent.

Training: Assigned list, extra quiz attempts, To check (grading) and certificates

Every control on the Assigned and To check tabs: the filter, More, extra attempt, grading, practical tasks, approve and revoke certificates.

Where to find it: Contractor Hub → Team & Training → **Training** → **Assigned** and **To check** tabs. Owners and people with training review or manage rights see them. Employees do their courses in My work → Training.

Assigned lists who has which course and how far they are. **To check** holds the work a person must look at: written quiz answers, practical tasks, and certificates that need approval. Building and assigning courses is in the training course and assignment forms article.

Fields: Assigned tab

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Show (`state`)	Filters the list by state.	Pick **Everyone**, **Late**, **In progress**, **Not started**, **Awaiting review**, **Completed**, **Expired** or **Failed**.	Everyone.
More (on each row)	Opens a window for that assignment.	Click.	
Allow one more attempt on (`lesson_id`)	Picks which quiz in the course gets an extra try. Shown only when the course has a quiz.	Choose the quiz. The **Which quiz** label is the same list.	The first quiz.
Allow one more attempt	Grants one extra attempt on that quiz, with the reason you typed.	Click. Message: "One more attempt allowed."	
Reason (optional) (`note`)	A note kept with the change (max 120 characters).	Example: "Missed the first try, sick."	Empty.
Remove this assignment	Takes the course off that person. Their history is kept.	Click.	

People who are no longer in your crew list show as "Former employee".

Fields: To check tab, written quiz answers

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Correct / **Partly** / **Not correct** (one set per question)	Your mark: 1, 0.5 or 0. Every answer needs a mark.	Pick one per answer. The "Good answer looks like" text comes from the course.	None.
Note to the employee (optional) (`feedback`)	A message the employee sees with the grade (max 400).	Example: "Remember to lock out the mower first."	Empty.
Save grades	Saves marks. If any answer has no mark: "Give every answer a mark."	Click.	

Fields: To check tab, practical tasks

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Result (`result`)	Your verdict on the work.	**Competent** or **Needs more practice**.	Competent.
Feedback (`feedback`)	What they did well or should fix (max 400). Required when you send the work back.	Example: "Edge is uneven on the left."	Empty.
Approve	Passes the task.	Click.	
Send back to redo	Returns it for another try. If Feedback is empty: "Say what to fix, so they know what to redo."	Click.	

Fields: Certificates

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Approve (under "Certificates waiting for approval")	Issues a certificate that was waiting because the course needs a manager's approval.	Click.	
Revoke (on a valid certificate)	Opens a window to cancel the certificate.	Click.	
Reason (`reason`)	Why it is revoked, kept in the record (max 200, required).	Example: "Issued in error."	Empty.
Revoke (in the window)	Revokes it. Anyone checking the code sees it is no longer valid. The record stays.	Click.	

Steps

1. Open Training → **To check**. Read each answer or practical task.
2. For written answers, mark every answer and press **Save grades**.

3. For practical tasks, choose **Result**, type **Feedback**, then **Approve** or **Send back to redo**.
4. Approve waiting certificates.
5. To give someone another quiz try, open **Assigned**, press **More**, pick the quiz and press **Allow one more attempt**.

If something goes wrong

- "Give every answer a mark." Mark each question first.
- "Say why, so the record makes sense later." Fill Reason before revoking.
- The extra-attempt box is missing: the course has no quiz step.

Training: Talks (toolbox talks), Library procedures and file uploads

Every box for toolbox talks and attendance, procedures with read confirmations, crew how-to approvals and uploaded course files.

Where to find it: Contractor Hub → Team & Training → **Training** → **Talks** tab and **Library** tab.

Talks records safety talks and who was there. **Library** holds your written procedures and the files used in courses. Hours shown for talks are the minutes you enter. They are not timed, and nothing is added to the time clock.

Fields: New talk or meeting

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Type (`kind`)	Labels the session.	**Toolbox talk**, **Tailgate meeting** or **Class**.	Toolbox talk.
Title (`title`)	Name of the talk (max 140). Required.	Example: "Ladder safety".	Empty.
Starts (`starts`)	Date and time. Required. Employees see today's talks to sign in.	Pick date and time.	Empty.
Led by (`leader`)	Who runs it.	Pick a person from your crew list.	First crew member.
Minutes (`minutes`)	Time counted for reports.	0 to 480.	15.
Course to link (optional) (`course_id`)	Links a published course to the talk.	Pick a course or **None**.	None.
Topic or notes (`topic`)	What it covers (max 500). Employees see it.	Free text.	Empty.
Who is expected (`roster`)	The people who should attend. Used for the attendance rate.	Tick crew members.	None ticked.
Anyone can sign in (not only the people above) (`open`)	Lets people not on the list sign in.	Tick if open.	Off.
Create / **Save**	Saves the talk. If Title or Starts is empty: "Give it a title and a start time."	Click.	

Fields: Attendance

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Attendance (on a talk)	Opens the roll.	Click.	
Present / **Absent** (per person)	Records that person. Employees can also sign in themselves.	Click.	Not recorded.
Close the talk	Locks the roll and lists no-shows.	Click.	

Fields: Library tab

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Upload a file for courses (file)	Adds a video, audio, picture, PDF or document, or a captions file (.vtt). Files are checked by content and shown only to signed-in people from your company.	Choose a file. A progress bar shows.	None.
Approve / **Decline** (crew how-to videos)	Publishes or rejects a how-to video a crew member made.	Click.	
New procedure / **Edit**	Opens the procedure form.	Click.	
Title (`title`)	Procedure name (max 140).	Example: "Mower pre-start check".	Empty.
Category (`category`)	Groups procedures (max 40). Employees filter by it.	Example: "Equipment".	Empty.
Tags (comma separated) (`tags`)	Search words (max 200).	Example: `mower, safety`.	Empty.
Status (`status`)	Whether employees see it.	**Draft**, **Published**, **Archived**. Publishing saves a new numbered version; older ones are kept.	Draft.
Text (Procedure text, `body`)	The procedure itself. Simple HTML (paragraphs, lists, bold) is fine.	Write the steps.	Empty.
Who sees it (`roles`)	Which roles can read it.	Tick **crew**, **leader**, **manager**. All three ticked means everyone.	All ticked.
People must confirm they read it (`ack_required`)	Employees must tap "I have read and understood version N".	Tick for safety rules.	Off.
Keep a read receipt (`read_receipt`)	Keeps a record of reads.	Tick if wanted.	Off.
Save	Saves the procedure.	Click.	
Who has read it	Lists who confirmed (version and date) and who is still to read. A confirmation is a record, not a legal signature.	Click.	

Steps

1. Talks → **New talk or meeting**. Fill Type, Title, Starts, Led by, Minutes, and tick who is expected. Press **Create**.
2. On the day, press **Attendance**, mark **Present** or **Absent**, then **Close the talk**.
3. Library → **New procedure**. Fill the boxes, set **Status** to **Published**, and press **Save**.

If something goes wrong

- A procedure does not show for employees: it is still Draft, or their role is not ticked.
- An upload fails: the message under the file box says why (size or type).

Training: New hires checklists, People (skills, roles) and Reports

Every box on the New hires, People and Reports tabs: checklist items, who ticks, giving a checklist, recording a skill you watched, report types.

Where to find it: Contractor Hub → Team & Training → **Training** → **New hires**, **People** and **Reports** tabs.

New hires holds checklists you give to new staff. People shows who is qualified in which skill and what each role must do. Reports shows tables you can download.

Fields: New hires tab

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Start from "" buttons	Saves a starter checklist as a draft you can change. Read it and edit it to match how you work.	Click.	
New checklist	Opens the checklist form.	Click.	
Name (`name`)	Checklist name (max 100).	Example: "First week".	Empty.
Item 1, Item 2 … (`items[].label`)	One line per task (max 160). Blank lines are dropped.	Example: "Watch the mower safety course".	One empty item.
They tick / **Manager ticks** (`items[].who`)	Who marks this item done.	Pick per item.	They tick.
+ Add an item / ×	Adds or removes an item.	Click.	
Save	Saves the checklist.	Click.	
Give to a new hire	Opens the give window.	Click.	
Who	The person who gets it.	Pick from your crew list.	First crew member.
Start date (optional) (`start_on`)	When it begins.	Pick a date.	Empty.
Give checklist	Assigns it. "They already have this checklist." appears if they do.	Click.	
Tick items (on an In progress row)	Opens the items only a manager can tick.	Click.	
Manager item check boxes	Ticks or unticks an item.	Tick.	
Done	Closes the window.	Click.	

Fields: People tab

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Record a skill I watched	Opens the observation form.	Click.	
Who (`emp`)	The person you watched.	Pick from your crew list.	First crew member.
Skill (`skill`)	Skill name (max 40). Suggestions come from skills your courses prove.	Example: "Edging". Required: "Name the skill."	Empty.
How it went (`result`)	Your verdict.	**Did it well**, **Needs more practice**, **Needs retraining**.	Did it well.
Note (`note`)	A short comment (max 300).	Free text.	Empty.
Save	Records it.	Click.	

The skills table (Qualified, Expired, In progress, Not yet) and the "What each role must do" lists are read-only.

Fields: Reports tab

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Report (`kind`)	Chooses the table.	**Every assignment**, **By person**, **By course**, **Talk attendance**, **Certificates**, **Questions people miss**, **Safety training hours**, **Read confirmations**.	Every assignment.
Download as a spreadsheet (CSV)	Downloads every row of the chosen report. The screen shows the first 200.	Click.	

Steps

1. New hires: press **New checklist** (or a starter), add items, set who ticks each, press **Save**.
2. Press **Give to a new hire**, choose the person and press **Give checklist**.

3. People: press **Record a skill I watched** after you watch someone work.
4. Reports: choose a report and press **Download as a spreadsheet (CSV)**.

If something goes wrong

- "Name the skill." Type a skill before saving.
- "Nothing to show for this report yet." No records exist for that report.

Training settings: reminders, renewals, badges and automatic assignment rules

Every switch and box on the Training Settings tab, including the pause switch, reminder days, renewals and the rule form.

Where to find it: Contractor Hub → Team & Training → **Training** → **Settings** tab. Owner or training manager.

These settings control training reminders, automatic re-assignment before a certificate expires, optional badges and automatic hand-out rules. Most switches save the moment you change them.

Fields: Reminders

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Pause all training reminders (`pause`)	An emergency switch. While on, nothing is sent and nothing is lost. A banner says "Reminders are paused."	Tick to pause.	Off.
Tell managers about late training (`manager_alerts`)	Sends managers a note when training is late.	Tick or untick.	On.
Remind this many days before due (0 = on the day) (`remind_days`)	Employees are reminded on each listed day before the due date.	Numbers separated by commas. Example: `3, 1, 0`. Press **Save days**.	3, 1, 0 (starting values, not approved; set your own).
Save days	Saves the list.	Click.	
Send due reminders now	Sends due reminders immediately. Says "Paused – nothing sent." if paused, else "Sent N reminders."	Click.	

Fields: Renewals

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Assign the course again automatically before a certificate expires (`renew_auto`)	Re-assigns the course when a certificate is about to expire.	Tick or untick.	On.
Give them this many days to renew (`renew_due_days`)	Due date for the new assignment.	0 to 365, then **Save**.	14 (starting value, not approved).

Fields: Optional extras

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Badges for finished courses (`badges`)	Turns on badges and points on employees' My record page.	Tick.	Off.
Let people join a points leaderboard (`leaderboard`)	Shows a leaderboard employees can join. Each person chooses whether to appear.	Tick.	Off.

Fields: Hand out training automatically

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
New rule / **Edit**	Opens the rule form.	Click.	
Name (`name`)	Rule name (max 100).	Example: "New crew hire".	Empty.
When (`trigger`)	The event that fires it.	**When someone is hired** or **When someone's role changes**.	When someone is hired.
Days to finish (`due_days`)	Due date after assignment.	0 to 730.	14.
Only for these roles (`filter.roles`)	Limits the rule.	Tick **crew**, **leader**, **manager**. None ticked means everyone.	None.
Courses to give (`courses`)	Published, unarchived courses to assign.	Tick any.	None.
Checklists to give (`onboarding`)	New-hire checklists to give.	Tick any.	None.
Rule is on (`active`)	Turns the rule on or off.	Tick.	On.
Save rule	Saves it.	Click.	
Try it	Shows who the rule would change, without changing anything.	Click.	

A **Recent changes** list below shows the last 15 settings changes.

Steps

1. Check **Pause all training reminders** is off.
2. Type your reminder days and press **Save days**.

3. Decide on renewals and set the days to renew.
4. Press **New rule**, fill it in, press **Try it**, then turn it on.

If something goes wrong

- Reminders do not arrive: look for the "Reminders are paused" banner.
- A rule changes nobody: **Try it** says "It would not change anything today."

Training course builder: step kinds, captions, files, move and remove controls

The builder controls the main training form article leaves out: step kinds, section and step movers, text toolbar, captions, uploads, language, question kinds.

Where to find it: Contractor Hub → Team & Training → **Training** → **Courses** → open a course (or **New course**). This article adds controls not covered by the training course and assignment forms article. Fields such as Title, Pass mark and Days to finish are described there.

A course is a draft until you publish it. Publishing makes a numbered version. People who started a version keep it.

Fields

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Kind of step to add	Chooses the type of the next step.	**Reading**, **Video**, **Audio**, **Picture**, **PDF**, **Other file**, **Link**, **Checklist**, **Quiz**, **Survey**, **Practical task**, **Acknowledgment**. Then press **+ Add a step**.	Reading.
Section title	Names the section (max 140).	Example: "Safety basics".	"Lessons".
Move section up / **Move section down** (↑ ↓)	Reorders sections.	Click.	
Remove empty section	Deletes a section with no steps.	Click.	Only shown when empty and more than one section.
+ Add a section	Adds a section called "New section".	Click.	
↑ Up / **↓ Down** (on a step)	Reorders steps inside a section.	Click.	
Remove step	Removes a step from the draft after you confirm. Published versions keep it.	Click.	
Text formatting buttons (**B**, •, **1.**, **H**, 🔗)	Bold, bulleted list, numbered list, heading and link in Text, transcript and instruction boxes. Pasted text arrives as plain text. Links must start with https://.	Select text and click.	
Upload a file (file input)	Uploads a video, audio, picture, PDF or other file for the step. For video and audio the length is read for you and a title is suggested.	Choose a file.	A video on another website cannot be tracked, so upload the file.
Choose from files already uploaded	Reuses a file from the Library.	Click, then **Use**.	
Use a different file	Detaches the current file.	Click.	
Upload a captions file (.vtt)	Adds captions to a video.	Choose a .vtt file.	None.
Remove captions	Removes captions from that step.	Click.	
Language (`language`)	Short language code of the course (max 10). Used so employees who pick another language are offered a translation.	Example: `en`, `es`.	en.
Kind of question to add	Chooses the next question type.	**One right answer**, **Several right answers**, **True or false**, **Put in order**, **Match pairs**, **Written answer (a person grades it)**. Then **+ Add a question**.	One right answer.
Kind of question (on a question)	Changes the type and keeps the question text and explanation.	Pick another.	
Move up / **Move down** (option or question)	Reorders options in an order question and questions in a quiz.	Click.	
Remove option (×)	Removes a choice; at least two stay.	Click.	
Remove pair (×)	Removes a match pair; at least two stay.	Click.	
+ Add a pair	Adds a left/right pair.	Click.	
What a good answer covers (`sample`)	Notes only the person grading sees (max 600).	Example: "Mentions lock-out and gloves."	Empty.
Skills this course proves (`skills`)	Skill names given to everyone who finishes it.	Comma-separated. Example: `Mowing, Edging`.	Empty.
Remove question	Deletes a question; at least one stays.	Click.	

Steps

1. Open or create a course and fill **About this course**.
2. Choose a step kind and press **+ Add a step**.

3. Format text with the toolbar and upload any file.
4. Add captions to videos.
5. Press **Save draft**, then **Preview as an employee**, then **Publish**.

If something goes wrong

- "Give the course a title first." Fill the title.
- Captions say "No captions file yet." Upload a .vtt file.

Training for employees (My work): practical hand-in, quizzes, procedures, rating, record

Every box an employee sees in My work → Training: hand in work with a photo, answer quizzes, acknowledge, search procedures, rate, language and record.

Where to find it: My work → **Training** (employees sign in with their normal My work sign-in). Owners can open it to see what employees see.

Employees see their assigned courses (late ones first), today's talks, procedures to acknowledge and their own record. The website grades quizzes, counts the video that was really played and decides when a course is finished.

Fields

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Sign in (button on today's talk)	Records that the employee attended.	Click.	
Checklist boxes (new-hire checklist)	Ticks the items assigned to the employee. Manager-only items are locked.	Tick.	
I have read this / **I have seen this**	Marks a reading, picture, PDF, file or link step done.	Click.	
Checklist item boxes (checklist step)	Each tick is saved at once. The step finishes when all are ticked. "N of M ticked" shows.	Tick.	
Acknowledge checkbox and **Acknowledge** (acknowledgment step)	Records that the employee read the wording, with the date. Not a legal signature.	Tick the box, then click.	Button is off until ticked.
What did you do? (`notes`)	Describes the work for a practical task (max 1000).	Example: "Edged the front bed, 40 ft."	Empty.
Add a picture or PDF of your work (file; label "Picture of your work (required)" or " (optional)")	Attaches a photo or PDF. Required when the course says so: "Add a picture of your work first."	Choose an image or PDF.	
Hand in my work	Sends the task to the trainer.	Click.	
Quiz answers	One right answer: pick one. Several: tick all. True/False: pick. Put in order: use ↑ ↓. Match pairs: choose from each "Choose..." list. Written answer: type (max 2000).	Answer every question.	
Your rating (1 to 5 stars, `stars`)	Rates the course after finishing. "Pick the number of stars." if none.	Click a star.	None.
Comment (`comment`)	What was useful or confusing (max 600). Optional.	Free text.	Empty.
Send / **Not now**	Sends or skips the rating.	Click.	
Search procedures (`q`)	Finds procedures in the Procedures list as you type.	Type a word.	Empty.
Topic chips (**All** and each category)	Filters procedures by category.	Click.	All.
I have read and understood version N	Acknowledges a procedure that requires it.	Click.	Shown only if required.
I would like my training in (`language`)	Chooses a translated version when one exists.	**The course language**, **English**, **Español**, **Português**, **Français**.	The course language.
Show me on the leaderboard	Lets others in the company see the employee's name and points. Only appears if the owner turned on badges and the leaderboard.	Tick.	Off.
Print my record	Prints courses, talks and skills.	Click.	
Download all my training data	Saves `my-training-data.json`.	Click.	

Steps

1. Open My work → Training.
2. Open a course and work through the steps in order (or any order if the owner chose that).
3. For a practical task, type what you did, add a picture and press **Hand in my work**.
4. After the last step, rate the course.
5. Open **My record** to print or download your data.

If something goes wrong

- "Add a picture of your work first." The task requires a photo.
- A step stays "not done": for videos, play enough of it to reach the share set by the owner.

Community: Members, Ban, Unban and Give points

Ban or unban members and give or take away bonus points from the Members table.

Find it under **Settings → VisionScaper Community → Members**. It shows the top 40 members by lifetime points. Only users who can manage options (WordPress administrators) can open this screen.

The screen's own note: banned members can still design, but cannot post, comment, like or message.

Columns

Member (name, display name and email), Level (emoji and level name), Points (balance / lifetime), Status (OK or Banned), Action.

Fields

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Ban / **Unban** `do=ban` / `do=unban`	Ban sets a banned flag on the member and hides their live posts. Unban removes the flag; their posts stay hidden until you restore them one by one.	Click. Ban asks "Are you sure?".	Cannot be used on administrators.
Number box next to the button `points`	The amount of points to give. Negative numbers take points away.	Whole number such as 25 or -10.	Default 50 (placeholder, not approved; set your own).
Give points `do=bonus`	Records an "admin" points entry, adds the amount to the member's balance and sends them a notification.	Click. Message: "Points given."	A value of 0 does nothing.

Steps

1. Find the member in the table.
2. To give a reward, type the number in the box and click **Give points**.
3. To ban, click **Ban** and confirm. To reverse, click **Unban**.
4. Read the green message.

Tips

- The member sees "You received N bonus points from the team!" for positive values, or "Points adjusted by the team: N" otherwise.
- Point values are your own choice; none are approved.

If something goes wrong

- Member not listed: only the top 40 by lifetime points appear.
- Unban did not bring posts back: restore them in Latest posts.

Goals and reviews: every box for goals, progress notes and written reviews

Fields for goals, progress notes and the review life cycle: draft, share, employee confirms, sign off; scores on six fixed items.

Where to find it: Contractor Hub → Team & Training → **Goals and reviews** (address #/team/performance). Owners and people with review rights write goals and reviews. Employees see only their own goals and the reviews shared with them. These are working notes, not legal or HR advice.

A review stays a draft until you share it. The employee then confirms they read it, you sign it off, and it locks.

Fields: Reviews tab filter bar

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Person (`emp`)	Shows one person's reviews. Managers only.	Pick a person.	Everyone.
Status (`status`)	Filters by stage.	**Any status**, **Draft**, **Waiting for the employee**, **Waiting for sign-off**, **Signed off**.	Any status.
Search (placeholder "Period or name", max 60)	Finds reviews by period or name.	Type, press Enter or **Show**.	Empty.
Show / **Write a review** / **Download list**	Applies filters, opens the form, or downloads a CSV.	Click.	

Fields: Write a review / Edit draft review

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Person (`emp`)	Who the review is about (not yourself). Fixed after the first save. Required.	Pick one.	Choose a person.
Period (`period`, max 60)	The label for the review. Required.	Example: `Spring 2026`.	Empty.
From / **To**	Dates the review covers.	Pick dates.	Empty.
Score for **Quality of work**, **Reliability and attendance**, **Safety**, **Teamwork**, **Customer care**, **Initiative and learning** (`ratings.<item>.score`)	A 1 to 5 score for each of the six fixed items. The overall score is worked out from those you rate.	**Not rated**, **1 - Needs improvement**, **2 - Developing**, **3 - Meets expectations**, **4 - Exceeds expectations**, **5 - Outstanding**.	Not rated.
: comment (max 400)	A comment for that item.	Free text.	Empty.
Strengths (max 2000)	What the person does well.	Free text.	Empty.
Next steps (max 2000)	What to work on.	Free text.	Empty.
Save draft / **Cancel**	Saves ("Nobody else can see it yet.") or leaves.	Click.	

Fields: working with a review

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Edit / **Delete draft**	Change or remove a draft.	Click.	Drafts only.
Share with	Shows it to the employee and stops editing, after you confirm.	Click.	
Anything you want to add (optional) (employee, max 600)	The employee's comment with their confirmation.	Free text.	Empty.
I have read this review	Employee confirms they read it. It does not mean they agree.	Click.	
Note (optional) / **Why sign without their confirmation** (max 600)	A note with your sign-off. The second wording is required if the employee has not confirmed.	Free text.	Empty.
Sign off and lock	Locks the review for good, with a fingerprint that changes if text is altered.	Click, confirm.	
Write a corrected review	Starts a new review that points back to the locked one, titled " (corrected)".	Click.	
Print	Prints the review.	Click.	

Fields: Goals tab

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Add a goal	Opens the goal form. Managers only.	Click.	
Person	Who the goal is for. Fixed after saving. Required.	Pick one.	Choose a person.
Goal (`title`, max 160)	What to achieve. Required.	Example: "Finish pruning course".	Empty.

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
How it is measured (`measure`, max 300)	How you will know it is done.	Example: "Pass the quiz at 90%".	Empty.
Due date	Goal deadline. Past due goals are flagged.	Pick a date.	Empty.
Status	Where it stands.	**Not started**, **On track**, **At risk**, **Done**, **Dropped**.	Not started.
Percent done (0 to 100)	Fills the progress bar.	A number.	0.
Save goal	Saves.	Click.	
Add a progress note (`text`, max 500)	A dated note on a goal card. Anyone who can see the goal can add one.	Free text.	Empty.
Save progress	Saves the note with the Status and Percent done on the card.	Click.	
Edit goal / **Remove**	Change or delete a goal. Managers only.	Click.	

Steps

1. Open Goals and reviews → Goals → **Add a goal**, fill it in and **Save goal**.
2. Open Reviews → **Write a review**. Choose person and period, score the six items, write Strengths and Next steps, press **Save draft**.
3. Open the review and press **Share with** .
4. After the employee confirms, press **Sign off and lock**.

If something goes wrong

- "Choose who the review is for." Pick a person.
- A locked review cannot be edited. Use **Write a corrected review**.

Company library: documents, who must agree, version notes and reminders

Every box in the Company library: search, new document, What changed note, who must read and agree, status and reminders.

Where to find it: Contractor Hub → Team & Training → **Company library** (address #/team/library). Staff can read published documents (which roles can open it was not checked in code). Owners and managers can write them.

The library holds how-tos and policies. A document can ask some or all of your people to read it and agree. "I agree" records that the person read that version on that date. It is not a legal signature.

Fields: finding documents

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Search (placeholder "Search the library", max 80)	Finds documents.	Type; press Enter or **Show**.	Empty.
Category	Filters by category.	Pick one.	All categories.
Show	Narrows the list.	**Everything**, **Waiting for me to agree**, **Policies only**.	Everything.
New document	Opens the document form. Managers only.	Click.	
Not read yet (n) tab	Lists people behind on policies. Managers only.	Click.	

Fields: New document / Edit

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Title (max 120)	Name of the document. Required.	Example: "Safety rules".	Empty.
Category (max 40)	Groups it.	Example: `Safety`.	Empty.
Text (max 20,000)	The document itself.	Write or paste.	Empty.
What changed? People see this. (`note`, max 300)	Shown in Version history. Everyone who agreed to the old version is asked to agree again. Shown when you edit a published document.	Example: "Added ladder rule."	Empty.
Note for the first version (optional)	Same box for a new document.	Free text.	Empty.
Publish / **Publish new version**	Makes the document visible. A new version asks past agreers again.	Click.	
Save as draft	Keeps it private. New documents only.	Click.	
Cancel	Leaves the form.	Click.	

Fields: Who must read and agree

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
People must read this and agree to it (`requires_ack`)	Makes agreement required.	Tick.	Off.
Who (`scope`)	Who must agree.	**Everyone on the team**, **Some roles**, **Named people**.	Everyone on the team.
Which roles	Shown for "Some roles".	Tick **Crew**, **Crew leaders**, **Managers**.	None.
Which people	Shown for "Named people".	Tick people.	None.
Days to do it (`due_days`, 1 to 90)	Time allowed before it counts as late.	A number.	14 (starting value, not approved; set your own).
Save	Saves the policy.	Click.	

Fields: other buttons

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
I have read this and I agree	Employee records agreement. Shown on published documents they must agree to.	Click.	
Edit / **Edit and publish a new version**	Changes the document.	Click.	
Who must agree	Opens the policy form.	Click.	
Who has agreed	Shows Person, Status (Agreed, Waiting, Not read yet) and Date.	Click.	
Version history	Shows each version, date, author and note.	Click.	

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Send reminders now	Sends reminders to people behind. A reminder also goes out each week. Paused if training reminders are paused.	Click.	
Download list	Saves the behind-list as a CSV.	Click.	

Steps

1. Press **New document**, fill Title, Category and Text, press **Publish**.
2. Open it and press **Who must agree**. Tick the requirement, choose who, set days, press **Save**.
3. Watch **Not read yet** and press **Send reminders now** if needed.

If something goes wrong

- Nobody sees the document: it is still a draft.
- Reminders show "Reminders are paused in Training settings." Turn off the pause switch.

Equipment, Inventory and Request sources: custom fields, parts note, who did it, search and CSV

Plain-language detail for the equipment custom fields, parts and oil note, who did it, stock search, Other note, CSV import and pasted request email.

Where to find them: Equipment is under Schedule & Field → **Equipment**. Inventory is under Schedule & Field → **Inventory** (address #/work/field/inventory). Request sources is under Customers & Sales → **Request sources**. The main field tables are in the equipment, inventory and request-source articles. This article explains the boxes that those tables list only briefly, and adds the boxes they leave out.

Fields: Equipment

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Field (e.g. Fleet #, Warranty ends) (`data.fields[].label`)	The name of your own fact about a machine. It is shown under "All maintenance & history" so your crew can see it (any other effect was not verified in code).	Example: `Fleet #`, `Warranty ends`, `Assigned crew`.	Empty.
Value (`data.fields[].value`)	The fact itself.	Example: `12`, `2027-05-01`, `Crew B`.	Empty.
+ Add your own field	Adds another label and value row. The × removes one.	Click.	
New reading (`value`)	Updates the hour meter or odometer so "due" is worked out from the true number. A lower number than before asks you to confirm.	Type hours or miles. "Type the reading." appears if empty.	Empty.
Update	Saves the reading ("Reading saved.").	Click.	
Filter chips (`All`, 🔴 `Due now`, 🟡 `Due soon`)	Show every machine or only those with tasks due or soon.	Click.	All.
What was done (task ticks)	The tasks you finished. Each completed task gets its next due date.	Tick at least one: "Tick what was done."	The task you clicked.
Date	The day the work was done.	Pick a date.	Today.
Hour meter / **Odometer**	Reading when the work was done. Shown only for machines with a meter.	Number.	Current reading.
Cost ($)	What the service cost. Kept in the history.	Example: `42.50`.	Empty (0.00).
Done by (placeholder "Who did it (optional)", `by`)	Names who did the work. Shown in the history line.	Example: "Mike".	Empty.
Notes (placeholder "Parts, oil used, anything worth remembering", `note`)	A free note kept with the history line.	Example: "Changed oil, 10W-30, new filter".	Empty.
Save	Logs the service and schedules the next one: "Logged. The next one is scheduled."	Click.	
✅ **Log a service (several tasks)**	Opens the same window with no task pre-ticked.	Click.	

Fields: Inventory

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Search stock (placeholder "Search by name or code")	Filters the Stock tab by name or code after a short pause.	Type part of a name.	Empty.
Filter chips (`All`, `Low`, `On order`, `OK`)	Show items by status. Low means available stock is at or under the reorder level and nothing is on an open order.	Click.	All.
Note (needed for "Other")	Required when the reason is **Other (say why)**; up to 300 characters; kept in the history.	Example: "Gave 2 bags to a neighbor".	Empty.
Choose a spreadsheet file (CSV)	Loads a CSV of up to 600 KB into the File contents box.	Choose a file.	
File contents	You may also paste rows. First line must be column names: `name, sku, unit, cost, supplier, reorder_point, reorder_qty, location, qty`.	Paste.	Empty.
Check the file	Dry run. Shows new, to update and problem counts. Any problem stops the import.	Click.	
Import	Applies the file. Importing the same file twice changes nothing. Enabled only after a clean check.	Click.	
Download my stock list	Downloads a CSV of current stock.	Click.	
Make draft orders for everything low / **Reorder this**	Makes one draft purchase order per supplier. Nothing is sent.	Click on the Low tab.	
Release (Set aside tab)	Frees stock held for a job or quote.	Click.	
Try again (Not enough recorded tab)	Re-checks a job record after you add stock or fix a count.	Click.	

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Or start from names you already use on jobs and orders	Opens a list of names from your jobs and orders.	Click.	Shown when there are no items.
Tick boxes and **Add the ticked items**	Creates items with nothing in stock. "Tick at least one."	Tick, then click.	

Fields: Request sources

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
The email (placeholder "Paste the whole request email here, or the forwarded text.")	Where you paste a lead email you received another way. Nothing is added until you press **Add this request**.	Paste the whole message.	Empty.
Which service sent it?	Chooses the reading rules.	Pick a source.	First source.
Check it / **Add this request**	Previews what was read, then adds it.	Click.	

Review replies boxes are in the card reader and review replies article.

Steps

1. Equipment: open a machine card, enter **New reading**, press **Update**.
2. After a service press ✅ **Done**, tick tasks, fill **Cost**, **Done by** and **Notes**, press **Save**.
3. Inventory: use **Search stock**, then the chips to narrow the list.
4. For a bulk load press **Import / export**, choose a CSV, **Check the file**, then **Import**.

If something goes wrong

- "Type the reading." Fill New reading first.
- "That file is too big (600 KB at most)." Split the CSV.
- "Choose a file or paste the rows first." The import box is empty.

Postcards: audience, card text, QR code, cost approval and settings

Every box on the Postcards screen: who gets a card, the town list, headline and offer, QR landing page, approval, budget caps, return address and print account keys.

Where to find it: Contractor Hub → Marketing & Growth → **Postcards** (address #/grow/postcards). Needs a plan that includes postcards. Owner.

You choose who gets a printed postcard, edit the card, see the cost, and approve. Nothing is ordered until you approve a stated total. Then there is a cancel window. Printing and mailing are done by your own print-and-mail account (VisionScaper speaks the Lob service). Live printing has not been tested. The per-card price is a placeholder, not approved.

Before you start

- You need your own print-and-mail account with money in it. Follow the provider's current instructions to get an API key and a security key.
- Fill the **Return address** in Settings before you approve.
- A key that starts with `test_` runs in test mode: nothing is printed or mailed.

Fields: 1. Who gets a card

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
People who asked for a quote	Includes people at that stage.	Tick or untick.	Off.
Prospects	Includes prospects.	Tick or untick.	Off.
Current customers	Includes current customers.	Tick or untick.	On.
Past customers	Includes past customers.	Tick or untick.	On.
Only these towns (`audience.towns`, max 200; placeholder "e.g. Avon, Simsbury (leave empty for everyone)")	Limits the mailing to customers whose town is in the list. Empty means every town.	Towns separated by commas. Example: `Avon, Simsbury`.	Empty (everyone).
Last job at least this many days ago (`last_job_days_min`, 0 to 3650)	Only people whose last job was at least that long ago. Good for win-back.	Example: `365`.	Empty (any).

The count line shows "N can get a card · M skipped · K on the list" and an estimate. Skipped automatically: anyone marked "do not mail" or do-not-contact, incomplete addresses, mail that came back before, and a second card to the same address. Postcards need no text or email consent.

Fields: 2. The card

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Template cards	Start from a design.	**Spring cleanup**, **Summer lawn care**, **Fall cleanup**. Picking another clears your edits (the QR choice stays).	Spring cleanup.
Headline (max 70)	Big line on the front.	Example: `Ready for spring, {first_name}?`	The template's headline.
Line under it (max 120)	Sub-line.	Example: `Let {business} get your yard ready.`	The template's line.
Call to action (max 90)	The ask.	Example: `Call today to book.`	The template's.
Offer (optional - only what you want to promise) (max 100)	Printed only if you type it. VisionScaper never invents an offer.	Example: `10% off if you book by March 31.`	Empty.
Three or four short points (one per line) (max 4 lines)	Bullet list on the card.	One point per line.	The template's points.
Put a QR code on the back	Adds a QR code that is unique per card, so you can count scans.	Tick.	Off.
Where the QR code goes (`landing`)	The page people reach when they scan. Shown when the QR box is ticked.	Example: `https://your-website.com/spring`. Empty sends them to your home page.	Your default destination from Settings.
Refresh the preview	Redraws front and back for a sample customer.	Click.	

You can use `{first_name}`, `{business}`, `{phone}` and `{town}` in the text.

Fields: 3. Cost and approval

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Continue to cost and approval	Saves a draft order and opens it. Nothing is ordered.	Click.	
I approve N postcards for about $X.	Your confirmation. Required: "Tick the box to confirm you approve this order."	Tick.	Off.
Approve and start the cancel window	Approves the exact count and total. Cards go to the printer after the cancel window.	Click.	Off if blockers are listed (for example an over-budget order or no return address).
Change the list or card	Returns to the edit screens with this order's choices.	Click.	
Discard this draft	Deletes the draft after you confirm.	Click.	
Cancel this order	Stops it during the cancel window.	Click.	
Send now (skip the wait)	Sends immediately after you confirm. Cannot be undone.	Click.	
Send again	Retries a stopped order or one failed card.	Click.	
Do not mail this person	Leaves one person off the draft and stops future postcards to them.	Click.	

Fields: Settings tab

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Price per card ($) (`unit_cents`, 0 to 50 dollars)	The per-card cost used for estimates.	What your print company charges you.	1.25 (placeholder, not approved; set your own).
Your margin (%) (`margin_pct`, 0 to 500)	Added on top of the price in the estimate.	`0` for none.	0.
Most for one order ($) (`cap_order`)	An order over this cannot be approved.	Example: `250`.	250.00 (placeholder, not approved).
Most per month ($) (`cap_month`)	The most you may approve in a calendar month, counting every approved order.	Example: `1000`.	1000.00 (placeholder, not approved).
Cancel window (minutes) (`cancel_minutes`, 0 to 1440)	How long you can cancel before cards go to the printer.	Example: `60`.	60.
Name, **Street**, **City**, **State (2 letters)**, **ZIP** (`return_to`)	Printed on the back and used as sender. Required before approval.	Your business address.	Empty.
API key (password)	Lets VisionScaper send orders to your print account. Stored scrambled and never shown again; the saved hint shows.	Paste a `live_…` or `test_…` key. Leave empty to keep the saved one.	Empty.
Security key from the print company (password)	Lets VisionScaper trust automatic delivery updates.	Paste it. Leave empty to keep the saved one.	Empty.
Update address (read-only) and **Copy**	The address to enter under "automatic updates" on your print company's website so each card's progress appears.	Click **Copy** and paste it there.	Generated.
Default QR code destination (`landing`)	Used when an order has no QR address.	`https://…`	Empty.
Save settings	Saves the above.	Click.	
Allow postcards again (Do not mail list)	Removes a person from the skip list.	Click.	

Steps

1. Open Settings, fill the return address, set your price and caps, paste the keys, and press **Save settings**.
2. Open **New postcards**. Tick who gets a card, add towns if you want.
3. Pick a template, edit the text, add a QR code if you want, and press **Refresh the preview**.
4. Press **Continue to cost and approval**, read the total, tick the box and press **Approve and start the cancel window**.
5. Watch the Orders tab for status.

If something goes wrong

- Approve is off: read the list of reasons above it (return address, budget caps, account not connected).
- "Your print-and-mail account isn't connected yet." You can build and preview, but not approve.
- A card shows "Needs a new address": fix the customer's address, then press **Send again**.

Review request page: star buttons, private feedback box and what happens after

What a customer sees on the review page, the private feedback box (fb) and name box (nm), and what VisionScaper does with each answer.

Where to find it: this is a customer page, not a Hub screen. Customers reach it from the link in a review request message, a QR code or your general review link. You set the delay, alerts and review sites in Marketing → Reviews and Settings.

The page asks "How did we do?" The answer decides what the customer sees next. This article adds what happens behind each box. The box list itself is also in the public request form and review page article.

Fields

Field (exact label)	What it does for VisionScaper	What the customer enters	Default / notes
Star buttons 1 to 5 (`r`)	Saves the rating. A message-linked page updates that request. A general link makes a new rating row so it still appears in your numbers. A note "Rated you N/5 on the review page" is added to the customer's history.	Tap one.	None.
Anything we could do better? Tell us privately (`fb`, shown to 4 and 5 stars, inside a closed section)	Saves a private note. Placeholder: "Your note goes only to the owner".	Up to 3,000 characters.	Empty.
Your name (optional) (`nm`, 3 stars or less, only when the customer is not already known)	Added in front of the note ("Name: note").	Up to 80 characters.	Empty.
What could we have done better? (`fb`, required under 4 stars)	Saves a private note.	Up to 3,000 characters.	Empty.
Send privately / **Send to**	Sends the note. The page then says "Your message went straight to ".	Click.	
Review site links (for example ⭐ **Review us on Google**, Facebook, Yelp)	Open your public review pages. They stay visible even after a low rating.	Click.	Shown when the sites are set up.
Review the project with photos on VisionScaper	Link for people with a VisionScaper account, shown to 4 and 5 stars when the request came from a quote and that option is on.	Click.	

What VisionScaper does after the customer sends

- The rating is saved, and a history note is added to the customer.
- With 3 stars or less, and the **alert on low ratings** setting on, you get an alert with the customer's name and phone. (The setting name on screen is in your Reviews settings.)
- A private note is added to the customer's history ("Private feedback: ...") and you are alerted.
- The page limits each visitor to 30 tries an hour: "Too many tries — please try again later."
- Private notes can be brought into Review replies with **Bring them in**.

Steps (for you)

1. Open Marketing → Reviews and copy your review link or QR code.
2. Open it in a private browser window to see what customers see.
3. Rate it yourself (this makes a real rating row) and read the page for each path.

If something goes wrong

- No review site links: add your review pages in Marketing → Reviews.
- No alert on a low rating: check the low-rating alert setting.

How community moderation actions work

A plain list of every Community action, what changes behind it and what members see.

This article explains the three post and comment states and what each Community button does. Screen: **Settings → VisionScaper Community**.

The three states

State	Meaning
live	Visible to members.
hidden	Pulled from view, shown in Needs review.
removed	Pulled and its reports closed. Not listed in Latest posts.

Buttons and their effect

Button	Result
Keep (it’s fine) / Restore	Status live, reports 0, reports marked done.
Hide	Status hidden.
Remove	Status removed, reports marked done.
Ban / Ban member	Member flagged banned; their live posts become hidden.
Unban	Flag removed; posts stay hidden.
Give points	Adds points and notifies the member.

Steps

1. Decide whether the item is fine, doubtful or against your rules.
2. Fine: Keep. Doubtful: Hide. Against the rules: Remove.
3. Repeat offenders: Ban.

Tips

- Remove and Ban ask for confirmation; Keep, Hide and Restore do not.
- Administrators cannot be banned.

If something goes wrong

- Whether a removed item can be brought back through the screen is not available: Latest posts hides removed items (not verified further in code).

Site plan editor: toolbar, drawing options and item properties

Every box in the site plan drawing editor: view options, backdrop, the item panel and the properties for each kind of item.

The site plan editor is the drawing screen where you shape, measure and price a landscape plan. Everything is stored in feet. The aerial photo, a survey or a blank grid is only a backdrop behind your shapes.

Where to find it: Contractor Hub → Design Studio → Landscape plans, finish or open a plan and press **Open the plan** (the plan wizard does this after it generates your plan). Other entry points were not verified in code. It needs your plan to include Landscape plans.

Proposed items are priced automatically from your price book. Anything marked Existing is only for reference.

Before you start

- Set your price book first (Settings → Price book tabs) so the quantities become real prices. See the price book articles.

Fields

View options and top bar

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Snap 6" (`snap`)	Pulls every point you tap to the nearest half foot so lengths come out round.	Tick for tidy measurements; untick for free drawing.	On.
Square corners (`square`)	While you draw, a side that is within a few degrees of 45 or 90 degrees locks to that angle, so rectangles stay square.	Tick when drawing patios and buildings.	On.
Backdrop (checkbox) (`layers.bg`)	Shows or hides the backdrop picture (aerial, survey or grid). The shapes are not affected.	Untick to see only your shapes.	On.
Existing (checkbox) (`layers.existing`)	Shows or hides shapes marked Existing (house, driveway, old plants).	Untick to see only the new work.	On.
Proposed (checkbox) (`layers.proposed`)	Shows or hides the new work.	Untick to compare against what is there now.	On.
Notes (checkbox) (`layers.notes`)	Shows or hides Note and Measure items.	Untick before you print a clean view.	On.
Fit	Zooms and centers the view on everything you have drawn.	Click.	
Undo / Redo	Steps back or forward through your last changes (up to 80 are kept while the editor is open).	Click.	
Backdrop (button)	Opens a menu to choose the picture under the plan. The picture is only a guide; the plan is measured in real feet from your shapes.	Pick one. A survey or photo needs its scale set next (the Set scale tool opens for you). Choices: Aerial photo (to scale); Survey / plot plan / photo; Blank grid; Remove backdrop.	The first time you open an empty plan this menu opens by itself and is titled Start your plan.
AI Measure	Traces lawn, beds, patios and similar shapes from the aerial for you. The traced outlines are ordinary shapes you can edit.	Click, then review each outline.	Shown only when AI is available in your plan (availability not verified here).
Save plan	Closes the editor and saves the plan.	Click when done.	Closing with the X asks "Close without saving your plan changes?" if you changed anything.

Drawing tools (left bar)

Tools are buttons, not fields; they decide what the next taps draw.

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Select & edit (`tool=select`)	Tap a shape to edit it, drag corners to reshape, tap a blue dimension to type an exact length.	Click, then tap a shape.	Default: Selected
Planting bed / Lawn / Patio / Walkway / Stone area (`tool`)	Draws an area (bed, lawn, patio, stone area) or a line (walkway). Tap each corner; tap the first point or Done to close; hold and drag to draw a rectangle.	Click the tool, then tap on the plan.	
Retaining wall / Edging / Fence / Grading (`tool`)	Wall, edging and fence are lines you tap along then finish with Done; Grading is an area.	Click the tool, tap points, press Done.	
Plant / Light / Boulder / Feature / Light wire (`tool`)	Plant, Light, Boulder and Feature are single points. Choosing Plant first asks you to pick a plant from the library. Light wire is a line.	Click the tool, tap where it goes.	
House / Structure / Driveway / Property line (`tool`)	Existing things you trace for reference. They are marked Existing automatically and are not priced.	Click the tool, trace the outline.	

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Measure / Note / Set scale (`tool`)	Measure draws a distance line. Note drops a text note (asks "Note", up to 300 characters). Set scale: draw a line over something you know the length of, then type its real length.	Set scale prompt: "How long is that line in real life? (e.g. 16' or 9' 6")".	
Done / Remove last point / Cancel	Shown while drawing: Done finishes the shape, Remove last point takes back one tap, Cancel throws the shape away.	Click.	

Panel for any selected item

Select an item to see its panel on the right. These boxes appear for every kind.

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Existing (`existing`)	Marks the item as already there. Existing items are drawn for reference and are not priced.	Tick for things that stay.	Default: Off (on for house, structure, driveway, property line)
Remove it (`remove`)	Shown only when Existing is ticked. Prices the removal of an existing item instead of leaving it.	Tick for an old bed or fence you will take out.	Default: Off
Curved (`smooth`)	Shown for closed shapes. Rounds the corners into a smooth curve and prices curved patio paving with the curved-cut waste figure.	Tick for a curved bed or patio.	Default: Off
Label (`props.label`)	A name shown on the plan and in the quote line title ("Mulch installation - Front foundation bed").	Up to 120 characters, e.g. Front foundation bed.	Default: Empty
Size (width x depth)	Shown only for a four-sided square-cornered shape. Changing it resizes the rectangle from its first corner. Two small boxes (Width, Depth) and a Set button.	Type sizes like 16' or 12' 6", then Set.	A bad size shows: Type sizes like 16' or 12' 6".
Duplicate / + Corner / - Corner / Delete	Duplicate makes a copy offset by 3 ft. + Corner splits the longest side. - Corner removes the last point (needs more than 3 points for an area, more than 2 for a line). Delete removes the item.	Click.	Undo brings a deleted item back.
Plan notes (`plan.notes`)	Shown in the right-hand panel when nothing is selected. Free notes saved with the plan.	Anything the crew or customer should know.	Default: Empty
Tap a blue dimension (prompt)	Opens "Exact length of this side (e.g. 32' 6")". The side moves to that length; a rectangle keeps its shape.	Type feet and inches.	Nothing happens if the answer is not a length.

Planting bed (Cover, Material, Depth, New bed, Edging)

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Cover (`props.cover`)	Decides which material section is priced: mulch (cubic yards plus delivery plus spreading), crushed stone (tons plus fabric), or none.	Pick one. Choices: Mulch; Decorative stone; Plants only.	Default: Mulch
Material (bed, stone area) (`props.material`)	Names the mulch or stone on the quote line and scope text.	Up to 120 characters.	Default: double-ground hardwood (bed); 3/4" crushed stone (stone area)
Depth (inches) (`props.depth`)	Thickness of the cover. Cubic yards = area x depth / 12 / 27, plus the waste percentage from your price book.	e.g. 3 for mulch, 2 for stone.	Step 1, minimum 0.
New bed - remove turf & amend soil (`props.isNew`)	Adds a new-bed preparation section (turf removal and soil work).	Untick for an existing bed that only needs fresh mulch.	Default: On
Edging (`props.edging`)	Adds an edging section priced per linear foot from your price book.	Pick the edge type. Choices: None; Steel; Aluminum; Plastic; Stone/paver; Brick; Natural spade edge.	Default: Steel
Edging along (% of edge) (`props.edgeFrac`)	Share of the bed outline that gets edging (0 to 100, steps of 5). Lets you leave the house side without edging.	e.g. 60.	Stored as a fraction; blank counts as 0.

Other items: lawn, patio, walkway, wall, edging, fence, plant, light, boulder, feature, note

Each kind shows only the boxes that apply. Where the same label is used for two kinds, the kind is given in brackets.

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Method (lawn) (`props.method`)	New sod prices sod, topsoil, starter fertilizer and labor. Seed prices a seeding section. Keep existing lawn prices nothing.	Pick one. Choices: New sod; Seed; Keep existing lawn.	Default: New sod
Material (patio) (`props.material`)	Paver type on the quote line.	Pick one. Choices: Concrete pavers; Clay brick; Bluestone (thermal); Natural flagstone; Porcelain pavers; Tumbled stone.	Default: Concrete pavers
Border course (patio) (`props.border`)	Anything but None adds a border course to the patio section.	Pick one. Choices: None; Soldier course; Contrasting color.	Option values: none, soldier, contrast.
Steps (patio, walkway) (`props.steps`)	Number of steps added to the paving section (whole number, minimum 0).	e.g. 2.	Default: 0

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Width (ft) (walkway) (`props.width`)	Walkway width. Area = length x width, which drives paver or gravel quantities.	e.g. 4 or 3.5.	Step 0.5, minimum 0.5.
Material (walkway) (`props.material`)	Gravel path uses a gravel-path section; the rest use the paver section.	Pick one. Choices: Concrete pavers; Bluestone (thermal); Natural flagstone (shown as Flagstone); Clay brick (shown as Brick); Gravel path.	Default: Concrete pavers
Exposed height (ft) (wall) (`props.height`)	Height of wall you can see. Face area = length x height. Over 3 ft adds geogrid reinforcement lines.	e.g. 2.5.	Step 0.5.
Material (wall) (`props.material`)	Block name used in the scope text.	Up to 120 characters.	Default: Segmental wall block
Caps (`props.cap`)	Adds cap stones on top of the wall.	Untick for no caps.	Default: On
Planting area behind (`props.planting`)	Flags a planting area behind the wall (effect on the quote not verified in code).	Tick if plants go behind the wall.	Default: Off
Type (edging) (`props.type`)	Edge type for a stand-alone edging line, priced per linear foot.	Pick one. Choices: Steel; Aluminum; Plastic; Stone/paver; Brick; Natural spade edge.	Default: Steel
Type (fence) (`props.type`)	Selects the fence cost and install-hour figures from your price book.	Pick one. Choices: Vinyl; Wood; Aluminum; Split rail; Chain link.	Default: Vinyl
Height (ft) (fence) (`props.height`)	Fence height in the quote line and scope text.	e.g. 4.	Step 0.5.
Gates (`props.gates`)	Number of gates, each priced as a material line (the code uses a fixed per-gate figure; placeholder, not approved; set your own in the price book if it is exposed there).	e.g. 1.	Default: 0
Plant (Change) (`props.id / name`)	Swaps the plant for another from the library; name, type and spread update.	Click Change, pick a plant.	Shown only when the plant picker is available.
Type (plant) (`props.cat`)	Sets which planting price-book row (cost, labor and soil amendment) the plant uses.	Pick one. Choices: Tree; Evergreen tree; Shrub; Perennial; Ornamental grass; Annual; Vine.	Default: Shrub
Size (plant, boulder) (`props.size`)	Container or boulder size shown on the quote line. Plants with different sizes are priced as separate lines.	e.g. #3 container.	Up to 120 characters.
How many here (`props.count`)	Number of this plant at this spot. Plants with the same name and size are grouped into one quote line.	e.g. 3.	Default: 1
Spread on plan (ft) (`props.w`)	Width of the circle drawn for the plant on the plan, and the size you can tap to select it. Does not change the price.	e.g. 4.	Step 0.5.
Your price each ($, optional) (`props.cost`)	Your own per-plant cost. When above 0 it replaces the price-book figure for that plant line. If it is 0 and the price book has no figure, the line is flagged as needing a price.	e.g. 45.	Label says price, the code stores it as the unit cost (markup handling not verified).
Fixture (light) (`props.type`)	Lights are counted by fixture type and priced together in one lighting section with the wire.	Pick one. Choices: Path light; Spotlight / uplight; Well light; Wall / step light; Accent light.	Default: Path light
How many (light, boulder, feature) (`props.count`)	Quantity at this spot.	e.g. 6.	Default: 1
What (feature) (`props.name`)	Name of the one-off item shown on the quote.	e.g. Fire pit.	Default: Garden feature (placeholder "Fire pit, fountain...")
Your cost each ($) (feature) (`props.cost`)	Your cost per item. At 0 the quote line is flagged as needing a price.	e.g. 850.	Default: 0
Install hours each (feature) (`props.hrs`)	Labor hours per item, multiplied by the count.	e.g. 6.	Step 0.5.
Note (note item) (`props.text`)	Text of the note placed on the plan.	Up to 300 characters.	Default: Empty
Size (boulder) (`props.size`)	Boulder size in the quote line. Three or more boulders add a skid steer day.	e.g. 2-3 ft.	Default: 2-3 ft

Steps

1. Open the plan and, if it is empty, pick a backdrop in the Start your plan menu (Aerial photo, Survey / plot plan / photo or Blank grid).
2. If you used a survey or photo, pick the **Set scale** tool, draw over something with a known length, and type the real length.
3. Pick a tool, tap the corners, then press **Done** (or tap the first point).
4. Type exact sides: tap a blue number on a side and enter feet and inches, or use **Size (width x depth)** and press **Set**.
5. In the right-hand panel fill **Label** and the properties for the item (cover, depth, material, edging, counts, your costs).
6. Tick **Existing** for things that stay, and **Remove it** for things you will take out.
7. Press **Save plan**. Build the quote from the plan to see the priced lines.

If something goes wrong

- A line shows "needs price": a plant, feature or price-book row has no cost. Fill **Your price each ($, optional)** or **Your cost each ($)**, or add the price in Settings.
- Nothing is drawn after you tap: you are still in Select & edit. Pick a drawing tool first.
- Corners will not stay where you tap: untick **Snap 6"** or **Square corners**.
- You closed by mistake: the editor asks before it discards changes. Choose Cancel to stay.

Plan wizard steps 3 and 4: bird's-eye base map and tracing the property

Every control in Landscape plan wizard step 3 (Bird's-eye base map) and step 4 (Trace the property), including survey scale and the zoom buttons.

Steps 3 and 4 of the Landscape plans wizard give the plan its picture and its outlines. Step 3 gets a picture from above (or a survey, or nothing for a tape-only plan). Step 4 is where you tap the street, the property line, the house and the other parts.

Where to find it: Contractor Hub → Design Studio → Landscape plans → New landscape plan (or open an unfinished plan). Steps 1, 2, 5, 7 and 8 are in the article landscape-plan-wizard-fields.

Before you start

- Finish step 1 first. The map needs a full street address (house number, town, state), or a saved location.
- Aerial pictures cover US addresses. Connecticut has 3-inch state imagery; elsewhere the pictures are coarser (about 2 ft per pixel is quoted on screen for the coarser source).

Fields

Step 3: Bird's-eye base map

The title is "Get the property from above". A map opens on the property with a yellow crosshair on the home.

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Map (drag, pinch, scroll, + / -)	Frames what the picture will show. Drag so the house is in the middle and zoom until every edge of the property is on screen.	Drag and zoom. A guide card "Step 3 - Frame the property" repeats this.	You cannot choose a view while the status line warns that no aerial photos exist.
Use this view	Saves the view as the plan's picture and stores it on the property. The saved picture keeps extra margin (35 percent each side) around what you see so the tracing never runs off the edge. If you already traced on an older picture of the same place, the tracing is carried over.	Click once everything is in view.	Button text changes to "Saving the view...". If the pictures do not finish loading it says to check the connection and try again.
Keep it and continue	Shown when an aerial is already chosen: keeps it and moves on. A new view is only needed if part of the property was cut off.	Click.	
Upload a survey / plot plan	Opens the file/photo chooser. The picture is kept at up to 2,400 px and saved on the property. Then the scale box opens.	Pick a picture of the survey from the closing papers or the town hall.	Gives the most accurate property lines.
I'll measure everything with a tape	Starts the plan on a blank grid. You type the lot and house sizes instead of tracing.	Click.	
Length on the survey (feet)	Sets the survey scale. You tap both ends of a property line that has its length written on the survey, then type that length. It must be over 5 feet and the line must be long enough on the picture or you are asked to pick a longer one.	Feet, or feet and inches.	Messages: "Tap both ends of the line first." and "Type the length in feet, as written on the survey."
Set the scale / Set the scale / Continue	Saves the survey scale and moves to step 4 (shows a "Scaled from the survey" note on the scale check).	Click.	
Back	Goes to the previous step. Your work is saved as you go.	Click.	Default: Hidden on step 1
Next (the label changes: Next, Generate again, Generate my plan)	Goes on to the next step. It is switched off while a red problem is listed ("blocking"). For yellow warnings it asks "Before you go on... Continue anyway?".	Click when the footer says Ready.	The footer line shows Ready, "n things to check" or the first blocking problem.

Step 4: Trace the property

Tracing happens on the picture. Each part has a title and a one-line instruction. Parts marked required must be done to go on.

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Tap the street (required) (`trace.street`)	One tap on the street or sidewalk in front of the house. Tells the wizard which side is the front.	Tap the street.	
Trace the property line (required) (`trace.boundary`)	Tap each corner in order and tap the first corner again to close. Everything else is checked against this outline. No AI button for this part.	Tap corners.	
Trace the house (required) (`trace.house`)	Tap the corners of the house roof, including attached garages and porches with roofs.	Tap corners, close the shape.	Has a Find it with AI button.

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Tap the front door (optional) (`trace.door`)	One tap where the front door or steps meet the house. The front walk starts here.	Tap once.	
Trace the driveway (optional) (`trace.driveway`)	Corners of the paved driveway out to the street.	Tap corners, close.	Has Find it with AI.
No driveway (`trace.noDriveway`)	Shown on the driveway part. Marks that there is none and clears any outline.	Tick if the property has no driveway.	Default: Off
Other structures (optional) (`trace.structures`)	Trace sheds, detached garages, pools and decks one at a time. Skip if none.	Tap corners for each.	Has Find it with AI (shed or detached garage roof).
Trees to keep (optional) (`trace.trees`)	Tap the trunk of every tree that stays. New plants are kept clear of them.	Tap trunks.	
Undo	Takes back the last tap in this part.	Click.	
Clear	Asks "Clear this part and trace it again?" and wipes the part.	Click, then confirm.	
Find it with AI	Asks the AI to find the outline for the current part (house roof, driveway pavement, shed or detached garage roof). It then shows the result for you to correct.	Click, then fix the outline.	Shown only for parts with an AI option, and only when AI is available.
Next part	Moves to the next part of the trace. Looks filled when the current part is done.	Click.	On the last part it presses the footer Next button instead.
Zoom in (+) / Zoom out (-) / Fit	The three buttons on the trace picture. Fit (shown as a four-corner arrow) resets the view. The mouse wheel and a two-finger pinch also zoom; the wheel zooms the picture only, not the page.	Click, scroll or pinch.	Maximum zoom is 40 times.
Back	Goes to the previous step. Your work is saved as you go.	Click.	Default: Hidden on step 1
Next (the label changes: Next, Generate again, Generate my plan)	Goes on to the next step. It is switched off while a red problem is listed ("blocking"). For yellow warnings it asks "Before you go on... Continue anyway?".	Click when the footer says Ready.	The footer line shows Ready, "n things to check" or the first blocking problem.

Steps

1. In step 3, drag and zoom the map until the whole property is on screen, then press **Use this view**. For a survey, press **Upload a survey / plot plan**, tap both ends of a line with a written length, type that length and press **Set the scale**. For tape only, press **I'll measure everything with a tape**.
2. In step 4, follow the title on each part. Do the green required parts first: street, property line, house.
3. Use **Find it with AI** where it appears, then drag points to fix the outline. Use **Undo** or **Clear** to redo a part.
4. Press **Next part** until all parts are done, then **Next**.
5. Read the footer. If it shows a red message, fix that part. A yellow count means check, then continue if you accept it.

If something goes wrong

- "No aerial photos for this spot": use a survey or the tape option. Check the address in step 1 if the map is in the wrong place.
- "The aerial pictures didn't finish loading": check the connection and press **Use this view** again.
- Next stays grey: a required part (street, property line or house) is not finished.
- The survey scale is off: repeat the scale with a longer line; short lines give a poor scale.

Plan wizard steps 6, 9 and 10: site photos, designs and generate

Every button and prompt in Landscape plan wizard step 6 (Site photos), step 9 (Designs) and step 10 (Generate and review).

These are the steps after the tracing. Step 6 collects one photo per spot around the property. Step 9 lets you give any area a design of your own. Step 10 shows a summary, runs the generator and opens the finished plan.

Where to find it: Contractor Hub → Design Studio → Landscape plans, in the wizard. The steps are numbered the way the screen counts them.

Before you start

- The street, property line and house must be traced before photos can start (the wizard sends you back to step 4 otherwise).

Fields

Step 6: Take the site photos

The screen shows one card per photo spot. The number of cards depends on the areas you chose in step 2.

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Take photo / Retake	Opens the camera. The photo is checked right away; the card says to retake it if the check fails. If AI is available it also checks that the picture is an outdoor photo of the yard.	Stand where the small map shows the camera icon, face the arrow, take the picture.	JPG works best. Photos that cannot be opened say how to switch an iPhone to Most Compatible.
Choose a photo	Uses a picture from your gallery instead of the camera.	Pick a file.	
Can't get this one	Skips the spot. Prompt: "Why can't you take this one? (e.g. locked gate, dog, neighbor's yard, not safe)". The reason (first 120 characters) is saved and the plan notes the angle was skipped.	Type a short reason.	Shown only while the card has no photo.
Add a close-up	Optional close-up. After the photo you are asked "What does this show? (e.g. water pools here after rain; gas meter; slope toward the house)". The note is saved with the photo on the property.	Take a photo, type a note.	A photo that fails the check asks "Keep it anyway?".
Footer messages	Red: photos still to go. Yellow: photos kept despite a problem, or angles skipped.	Read and fix.	
Back	Goes to the previous step. Your work is saved as you go.	Click.	Default: Hidden on step 1
Next (the label changes: Next, Generate again, Generate my plan)	Goes on to the next step. It is switched off while a red problem is listed ("blocking"). For yellow warnings it asks "Before you go on... Continue anyway?".	Click when the footer says Ready.	The footer line shows Ready, "n things to check" or the first blocking problem.

Step 9: Designs for each area (optional)

Each area card offers these buttons. Leave an area alone and the wizard designs it in the style chosen in step 8.

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Load one of my designs	Picks a design you already made for this area.	Click, choose.	
Design on the bird's-eye view	Starts a new design on the aerial (exact sizes). Shown only when the base is an aerial.	Click.	
Design on the photo	Starts a new design on that area's photo (realistic look, estimated sizes). Shown only when the area has a photo.	Click.	The finished plan is marked as estimated if any area uses a photo design.
Use the quote's design	Shown when the wizard was opened from a quote that has a design.	Click.	
Use the style instead	Drops the design for that area and goes back to the style.	Click.	
Back	Goes to the previous step. Your work is saved as you go.	Click.	Default: Hidden on step 1
Next (the label changes: Next, Generate again, Generate my plan)	Goes on to the next step. It is switched off while a red problem is listed ("blocking"). For yellow warnings it asks "Before you go on... Continue anyway?".	Click when the footer says Ready.	The footer line shows Ready, "n things to check" or the first blocking problem.

Step 10: Generate and review

There are no typing boxes here. The page shows a Summary and a "Before generating" list of problems; each problem is a link that jumps to the step to fix.

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Generate my plan / Generate again	Builds the plan. On a second run it asks "Generate again? Changes you made to this plan in the editor will be replaced." Adds drainage, irrigation and call-811 notes plus your wishes, keep and remove lists from step 7.	Click once all problems are cleared.	The plan is saved to the property and the editor opens.
Open the plan	Opens the site plan editor.	Click.	
Build a quote from it / Back to the quote	Starts a quote seeded with this customer and property, or returns to the quote you came from.	Click.	
All plans	Goes to the list of plans.	Click.	

Steps

1. In step 6, work down the cards. For each, stand at the camera icon on the small map, face the arrow and press **Take photo**.
2. If a spot is not reachable, press **Can't get this one** and give a reason. Add **close-ups** of wet areas, slopes and utilities with a note.
3. In step 9, leave areas on the style or press **Load one of my designs** / **Design on the bird's-eye view** for areas you want to control.
4. In step 10, check the Summary and fix any listed problem by clicking it.
5. Press **Generate my plan**, review the plan in the editor, then press **Build a quote from it**.

If something goes wrong

- "n photos to go": you cannot pass step 6 until each spot has a photo or a reason.
- A design cannot be used: the card shows the issue; load a different design or press **Use the style instead**.
- You regenerated and lost edits: regenerating replaces editor changes. Use Undo in the editor before closing, or keep edits in a copy.

Invoice editor extras: line details, discount label, custom fields, footer and licence line

The small invoice boxes that are easy to miss: line Details, Discount label, custom field rows, and the footer and licence lines.

These boxes sit inside the invoice editor (Contractor Hub → Invoices → New invoice) and the invoice design settings (Settings → Invoice design). The full invoice form is in the article invoice-form-fields; the design boxes are in the two invoice design articles. This article gives the exact on-screen wording of the extras and what each does.

Before you start

- Business address, phone, email and website come from Settings → Business profile, not from these boxes.

Fields

In the invoice editor

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Details (optional) - shown under the line (`line.desc`)	Extra words printed under that one line item on the invoice and the live preview.	What was done, e.g. "Spring cleanup, front and back beds".	One box per line. Switched off on a locked (read-only) invoice.
Discount amount (`discount.value`)	A discount taken off the subtotal.	Number, minimum 0.	Used with the $ / % list next to it.
Discount type ($ or %) (`discount.type`)	Says whether the number is dollars or a percent.	Pick one. Choices: $ (amt); % (pct).	Default: $
Label (e.g. Loyal customer discount) (`discount.label`)	The words printed on the discount line of the invoice.	e.g. Loyal customer discount.	Default: Empty
Custom fields: Label (e.g. PO number) (`fields[].label`)	Name of an extra line printed on this invoice.	e.g. PO number.	Starts with your defaults from the design settings.
Custom fields: Value (`fields[].value`)	The value printed beside the label.	e.g. 4417.	Default: Empty
Remove field (X)	Deletes that row.	Click.	
+ Add a field (PO number, job site, work order...)	Adds a new empty Label/Value row.	Click.	
Notes (`o.notes`)	Free notes for this invoice; the placeholder shows your default text if you set one.	"Anything the customer should know".	Default: Empty (shows the default if you set one)

In Settings → Invoice design

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
License / registration line (`design.license`)	One line with your licence number, printed on invoices when the License line detail is on.	Your real registration text, up to 80 characters.	The Details to show switch "License line" must be on.
Footer (`design.footer`)	Small line at the bottom of every invoice.	One short line.	Default: Empty (placeholder "e.g. Green Acres LLC · 1 Yard Rd · Licensed & insured")

Steps

1. Open Contractor Hub → Invoices → New invoice and pick the customer.
2. For each line, type the item, then use **Details (optional)** for the extra wording.
3. To give a discount, type the amount, choose **$** or **%**, and type the **Label** customers will see.
4. Use **+ Add a field** for a PO number or job site. Fill Label and Value.
5. Check the live preview on the right. It shows exactly what the customer gets.
6. Set the licence and footer lines once in Settings → Invoice design and press Save there.

If something goes wrong

- The licence line does not print: turn on the License line switch under Details to show.
- A custom field is blank on the invoice: a row with an empty Value may be skipped (not verified in code); fill both boxes.

Hub customer, quote, job and search boxes: the hint text in each box

The grey example text inside Hub customer, quote, visit and profile boxes, and what each box does.

These boxes are covered field by field in other articles. This one lists the exact grey example text, so you can match what you see on screen to what the box is for.

Fields

Customer form (Add a customer / Edit customer)

Customers → Add. The last group is inside "More details (access, pets, utilities, billing)".

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Best time to reach (`data.best_time`)	Notes when to call or text.	e.g. weekdays after 5	Default: Empty
Budget (`data.budget`)	The customer's rough budget, for you only.	e.g. $5–10k	Default: Empty
Timeline (`data.timeline`)	When they want it done.	e.g. this spring	Default: Empty
Interested in (`data.interests`)	What they asked about.	patio, plantings, lighting…	Default: Empty
Lot size (`data.lot_size`)	Size of the property.	e.g. 0.5 acre	Default: Empty
Gate / access (`data.gate`)	Gate code or how to get in; shown to you when scheduling.	gate code / access	Default: Empty
Pets (`data.pets`)	Warns the crew about animals.	dog in yard?	Default: Empty
Hidden utilities (`data.utilities`)	Things to avoid when digging.	invisible fence, propane, septic…	Default: Empty
HOA (`data.hoa`)	Name of the homeowners association or its rules.	HOA name / rules	Default: Empty
Tags (`tags`)	Labels for searching; separate with commas.	VIP, corner lot…	Default: Empty
State (`state`)	Two letters.	ST (limit 2 characters)	Default: Empty

Quote, plant picker and search boxes

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Project name (`q.title`)	Title of the quote at the top.	Project name, e.g. Front Yard Renovation	Default: Empty
Customer picker (Choose a customer)	Type to find a customer.	Type a customer's name, phone or address	Default: Empty
Search plants	Plant picker in the quote builder.	Search 2,600+ plants (name, color, native…)	Default: Empty
Search quotes	Filters the quotes list.	Search title or number	Default: Empty
Search customers	Filters the customers list.	Search name, phone, email, address, tag…	Default: Empty
Describe the job (Create the quote with AI) (`brief.description`)	Text the AI turns into quote lines.	e.g. Remove the old shrubs along the front of the house, make a 3 ft deep bed with steel edging…	Default: Empty

Visits, notes and profile

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Customer (visit form) (`client`)	Optional customer on the visit.	Type a customer's name, phone or address (optional)	Default: Empty
Type of appointment (`kind`)	Kind of calendar entry.	Pick one. Choices: Site visit; Consultation; Estimate walk-through; Job day; Maintenance visit; Follow-up visit; Meeting; Door-to-door; Time off / blocked; Other.	Default: Site visit
What (visit title) (`title`)	Name of the visit.	e.g. Patio install – day 1, or start typing a service	Default: Empty
Notes for the crew (`notes`)	Shown on the crew sheet, not to the customer.	Materials to load, gate code, where to park…	Default: Empty
Details (Log activity) (`text`)	History entry text.	What happened? Next step?	Default: Empty
Private notes (employee) (`private.notes`)	Your own factual notes about a person.	e.g. 3/14 – trained on paver base; 5/2 – late twice this week (traffic)	Default: Empty
License # (business profile) (`license`)	Licence shown to customers.	e.g. HIC.0123456 or your state license number	Default: Empty
About your business (`bio`)	Public blurb.	What you do best, how long you've been doing it, what customers love about you.	Default: Empty

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Ask for another time (customer side) (`note`)	The customer tells you what times suit.	e.g. Any weekday after 3 pm works, or Saturday morning.	Default: Empty

Steps

1. Open the screen named above.
2. Read the grey hint, type your own value over it, and save with the button at the bottom.
3. Hints are examples only; nothing is filled in unless you type it.

If something goes wrong

- A search finds nothing: try fewer words; the customer search matches name, phone, email, address and tag.

Quick add forms, door-to-door hints and the homeowner property capture

The + menu forms (expense, task, clock in), the door-to-door house hints, and the homeowner property capture steps.

These are small forms with short labels. They send exactly what the phone app sends, and the server checks your rights again; a refusal is shown in the form and nothing is saved.

Where to find them: the **+** menu in the Hub (New expense, New task, Clock in); Contractor Hub → Door-to-door; and, for homeowners, the property steps in Find a contractor.

Fields

+ menu: New expense

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Amount ($) (`amount`)	Money spent. Must be above 0 ("Type the amount.").	e.g. 42.50.	Default: Empty
Category (`category`)	Files the expense.	Pick one. Choices: Materials; Fuel; Equipment & repairs; Dump / disposal; Subcontractor; Supplies; Meals; Other.	Default: Other if the list cannot load
Vendor (`vendor`)	Who got the money. Up to 80 characters.	e.g. Home Depot.	Default: Empty (placeholder "Who you paid")
Note (`note`)	Up to 300 characters.	e.g. Mulch for the Smith job.	Default: Empty (placeholder "What it was for")

+ menu: New task and Clock in

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Task (`title`)	Task title, 160 characters. At least 2 characters.	e.g. Order pavers.	Default: Empty (placeholder "What needs doing?")
Due (optional) (`due`)	Date picker.	Pick a date.	Default: Empty
Notes (`body`)	Up to 1,000 characters.		Default: Empty (placeholder "Notes (optional)")
What are you doing? (`activity`)	Starts a time clock for that activity. To clock into a job open the job.	Pick one. Choices: Your clock-in activities (the job and break choices are left out).	If none exist it says clock in is not set up (Field work → Settings → activities).

Door-to-door house sheet hints

Other boxes of this sheet are in door-to-door-and-measure-forms.

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Address (`address`)	House address, looked up when you tap the map.	Fix if wrong.	Default: Empty (placeholder "Address (looked up from the map)")
Name / Phone / Email	Contact details; shown for talked, interested, quote, call back, not interested, customer and competitor statuses.	Type what they told you.	A "Wants a quote" visit needs a name and a phone or email to become a lead.
Notes (`notes`)	Visit notes.		Default: Empty (placeholder "What did they say? What does the yard need? Best time to come back?")
What happened at this door? (status group) (`status`)	Radio group of result buttons. Choosing one may set a follow-up date.	Tap one.	Do not come back and No soliciting clear the follow-up date.

Homeowner property capture

Opened from "Let's build your property plan".

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Step 1 - Your address (`address`)	Creates a property record. Needs at least 6 characters.	Street, town, state.	Press Create my property.
Take photo / Upload / Load my aerial view	One per step: bird's-eye view, front, left side, right side, backyard, important structures, existing landscape.	Click.	Aerial covers US addresses; skip if not found.
Back / Next / Skip	Move between steps; Skip appears when the step has no picture.	Click.	

Steps

1. Tap **+**, choose the form, fill the boxes and press the save button.
2. For door-to-door, tap a house on the map, tap what happened, add notes and press Save.
3. Homeowners: open the property steps, enter the address and add photos for each step.

If something goes wrong

- "Type the amount." means the amount is empty or 0.
- "Give the task a short title." means fewer than 2 characters.

Search, find and name boxes: message details, intake examples, key name, Xero fields, appearance

Small boxes in message editing, intake questions, API keys, Xero and Appearance that are easy to overlook.

Each of these boxes is described in its own settings article. This page names the exact on-screen text and the effect, and records that they were checked.

Fields

Messages and intake

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Find a detail (name, date, total…)	Filters the tap-to-insert detail chips (customer name, date, total and so on) in the message editor. Tapping a chip types {tag} where your cursor was. A fallback after a bar works: {customer_first_name|there}.	Type part of a detail name.	Matches the chip label or the tag text.
Question (intake), e.g. Is there a dog in the yard during work hours? (`intake[].q`)	The question homeowners answer before sending you a request for that service.	Your question.	Default: Empty
Question type (`intake[].type`)	Controls the answer style. Choice and multi-choice show a Choices box.	Pick one. Choices: Types come from the code list (not listed here).	Exact option names are in settings-intake-questions.
Choices, separated by commas (`intake[].options`)	The answer buttons.	Yes, No, Not sure.	Only for choice types.
Why you ask (optional) (`intake[].why`)	Shown to homeowners; they answer more when they know why.	e.g. Dogs need to be put away.	Default: Empty

API keys, Xero and Appearance

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Key name (placeholder "For example: Zapier, or Reporting sheet") (`name`)	Label for a new access key so you can recognise it later. Then tick the permissions and press Make a key; the key is shown once.	Zapier.	Verified in article zapier-and-api-keys-access-keys-and-alerts.
Client ID (xr-cid) (`xr-cid`)	Xero app Client ID, up to 80 characters.	Paste from developer.xero.com.	Verified in settings-connected-apps-xero.
Client secret (xr-sec) (`xr-sec`)	Xero app secret; stored scrambled and never shown again.	Paste.	Default: Saved. Type a new one to replace it.
Xero organisation (xr-ten) (`xr-ten`)	Which Xero organisation receives your records.	Pick one. Choices: Your Xero organisations.	Default: Saved choice
Xero account for sales (xr-sales) (`xr-sales`)	Account code for sales lines, 20 characters.	200.	Default: Xero's usual one is 200
Xero bank account for payments (xr-pay) (`xr-pay`)	Account code payments are put into. Required before payments are sent.	Your bank account code.	Default: Empty
Search appearance settings (placeholder: Search settings - "font size", "dark mode", "menu order"…)	Searches Appearance settings and jumps to the matching one.	font size.	Default: Empty
Theme name (placeholder: Name, e.g. "Fall look")	Names a saved look so you can switch back.	Fall look.	Default: Empty
Describe a change (layout)	Plain-language change to the menu order.	put quotes first.	Covered in settings-appearance-layout-tab.

Steps

1. Open the screen, type in the box, and use the save button on that screen.

If something goes wrong

- Nothing found in a search box: use fewer or different words.

Designer boxes: design name, hardiness zone, spacing, notes, tags, angles and compare slider

Name, zone, repeat spacing, notes, tag, angle, address and before/after slider boxes in the customer-side designer.

These are controls of the design app that homeowners and contractors use. Most are described in the designer articles; these are the ones that were missing.

Fields

Naming

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Name your design / Name (optional) (`project.name`)	Title of the new design (also edited later in the top bar as Design name).	Spring front yard.	Blank becomes My design.
Name this view / Name this angle / Rename (prompts)	Rename a view tab, a 3D angle, a layer, a shape (40 chars), a version (50) or a design.	Type a name.	Cancel leaves it unchanged.
New tag name (`tag`)	Creates a tag you can put on designs. Enter adds it.	Pool area.	Rename or delete tags under My tags; this changes it on every design.
Name (selected item) (`name`)	Custom label of the selected plant, 40 chars.		Default: Plant name

Plants and zone

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
ZIP code (U.S.) (`zip`)	5-digit ZIP; Look it up fetches your hardiness zone.	06001.	Message: Type the 5-digit ZIP code.
I already know it... (I know my zone)	Sets your hardiness zone directly.	Zone 6. Choices: Zone 1 to Zone 13.	Plants show likely success; no plant is hidden.
Winter buttons	Pick your zone from winter cold.	Click one. Choices: Mild: it almost never freezes; Light freezes, rarely below 15 °F; Cold snaps near 5 °F; Cold, around −5 °F; Very cold, around −15 °F; Bitter, around −25 °F; Arctic, below −35 °F.	
How many / Spacing in feet	Plants a group: How many 2 to 25, spacing 0.5 to 50 ft; with In a row or Natural cluster.	5 and 4.	Default: 3 / plant width
Years from now (slider) (`years`)	Shows plants grown by that many years.	Slide.	Default: 0 (0 to 30)
Height (ft)	Height at the year on the slider.		Default: Current height

Notes and finish

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Notes about this design (`notes`)	Notes for you or your landscaper, 4,000 chars, in the Versions window.		Default: Empty
Street address, town, state (`address`)	Address for the 3D explore and aerial find; press Go or Find.	12 Elm St, Hartford, CT.	Default: Empty
Slide to compare before and after	Slides the before/after picture; Looks good - keep it saves.	Slide.	Default: 50
Preview on checkerboard	Shows the cut-out on a checkerboard in the asset maker.		Default: Off
Name (asset maker) (`state.name`)	Name of your own plant or item.		Default: Empty, 60 (placeholder "e.g. Mom's blue hydrangea")
Search the library or type a name (What is it?)	Matches your item to a plant.		Default: Empty

Steps

1. Open the control, type or slide, and the change applies to the design at once; it saves by itself.

If something goes wrong

- Lookup fails: pick your winter coldness instead.

Public pages: proposal sign page, join-the-list page and unsubscribe page

The boxes customers see when they sign a proposal, join your list, or unsubscribe.

Customers open these pages from links you send. You do not fill them in, but you should know what each box records.

Fields

Proposal page: Approve & sign

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Your full name (`nm`)	Printed name that goes with the signature.	Full name.	Default: Customer name if known
Draw your signature (Clear) (`pad`)	Signature box; Clear wipes it.	Draw.	Default: Empty
I agree to the scope, price and terms in this proposal and to sign it electronically... (`ag`)	Required consent; wording says the signature is legally binding like paper.	Tick.	Shown only while the proposal is open.
Optional: add-on checkbox (`addon`)	Each optional section has a box that adds its price.	Tick to add.	Default: Unticked
Approve & sign / Decline	Sign or decline.	Click.	An expired or declined proposal shows a message and your phone to ask for an update.

Join page (sign-up link)

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Your name (`n`)	Creates a lead for you.		Default: Empty, required
Mobile number (`p`)	Needed for texts.		Default: Empty
Email (optional) (`e`)	For email.		Default: Empty
Consent checkbox (wording from your business) (`c`)	Text consent; the exact wording, time and address are saved. Marketing texts up to 4 a month wording is shown.	Tick to get texts.	With a phone and no tick you need an email: "Tick the box to get texts, or add an email address."
Sign me up	Limit 8 tries an hour.	Click.	

Unsubscribe page

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Unsubscribe from emails (`what=email`)	Stops marketing emails; appointments, quotes and invoices still arrive.	Click.	
Stop all marketing (email & texts) (`what=all`)	Stops both channels.	Click.	
Oops - keep me subscribed (`what=resub`)	Undoes it.	Click.	

Steps

1. Send the proposal or join link. The customer fills the page; you see the result in the customer record.

If something goes wrong

- "Link expired": ask the customer to reply to the email so you can remove them by hand.

Website quote shortcode form: Request my quote

The boxes of the [dreamscaper_quote] design-and-quote form for your website.

Paste the shortcode `[dreamscaper_quote pro="USER_ID" title="Get a free quote"]` into a page. Default title: Get a free design & quote. Without pro, the first approved administrator contractor is used.

Fields

Form

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Property address (`address`)	Job address.		Default: Required
Town (`town`)			
Your name (`name`)			Default: Required
Email (`email`)			
Phone (`phone`)			
What would you like done? (`message`)	Request text.		
Request my quote	Sends the request as a lead.	Click.	
Design it with VisionScaper first	Opens the design app for that contractor.	Click.	

Steps

1. Add the shortcode to a page and publish. Test it once.

If something goes wrong

- Nothing shows: customer accounts or the CRM may be off, or no approved contractor.

Contractors screen: approve, suspend or reject applications

Review contractor applications and press Approve, Suspend or Reject.

Find it under **Settings → VisionScaper Contractors**. A small number badge appears on the menu when applications are pending. Only users who can manage options (WordPress administrators) can open this screen.

Contractors apply in VisionScaper under My Account → Become a VisionScaper contractor. Approved contractors appear under Find a Local Contractor and get the Contractor Hub. The screen reminds you to check license and insurance before approving. You, the site owner, are always approved.

Before you start

The contractor tools must be on. If not, a yellow notice links to **Settings → VisionScaper → Contractors**.

Table columns

Column	Shows
Business	Logo, name, website link, first 25 words of the bio.
Contact	Contact name, phone, email.
Area	Town, state, radius in miles, services.
License / insurance	License text or "none given", Insured ✔ or "not insured", years in business.
Activity	Quotes sent, quotes signed, jobs done, average star rating or "no reviews".
Status	Pending, Approved, Suspended or Rejected, plus the application date.

Fields (buttons)

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Approve `do=approve`	Sets status to approved, emails the contractor, notifies them in the app.	Click.	Hidden if already approved.
Suspend `do=suspend`	Sets status to suspended and notifies them in the app.	Click.	Shown only for approved contractors.
Reject `do=reject`	Sets status to rejected, emails the contractor, notifies them in the app.	Click.	Hidden if already rejected.

No buttons show for administrator accounts.

Steps

1. Open the screen; pending applications are listed first.
2. Read License / insurance and the website.
3. Click **Approve**, or **Reject** if you decline.
4. Look for the green "Saved." message.
5. To pause a contractor later, click **Suspend**.

If something goes wrong

- "No applications yet." means nobody has applied.
- The list shows at most 300 contractors.

Visitor chat window: Your name, Phone, Email, How can we help, Type a message

What website visitors see in the chat window and what each box does.

Settings for the chat are in website-chat-fields. This is the visitor side.

Fields

Start form

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Your name (`name`)	Names the visitor.		Default: Required, 60
Phone (or email below) (`phone`)	Contact.		Default: 30 chars
Email (`email`)	Contact.		Default: 120
How can we help? (`message`)	First message.		Default: up to 1000
Consent checkbox (`ok`)	Required: "Please tick the box to agree before starting the chat."		Default: Unticked
Start chat	Opens the chat.		

Chat

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Type a message	Enter sends, Shift+Enter new line.		Default: Max 1000
Send / Close chat			

Steps

1. Visitor opens the chat button, fills the form, ticks the box and starts.

If something goes wrong

- If the team closed the chat the visitor is told to start a new one.

Plant ID: whole plant, leaf, flower, fruit or bark (the organs value)

The part-of-plant buttons in Plant ID and how they become the organs value.

Plant ID asks which part is in the photo. The choice is sent as the organ value; anything else becomes auto.

Before you start

- A Pl@ntNet key (get-plantnet-key) in Settings, and a vision key as fallback.

Fields

Plant ID

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Whole plant / **Leaf** / **Flower** / **Fruit** / **berry** / **Bark** (`organ`)	Hint to Pl@ntNet. If its score is under 0.35 and a vision key exists, the vision model is also asked.	Click one. Choices: auto; leaf; flower; fruit; bark.	Limited to 60 identifications a day per visitor.

Steps

1. Open Plant ID, pick the part, take a close photo.

If something goes wrong

- Not a plant: try a close photo of a leaf or flower.

Admin pages re-scan: where every remaining input is documented

Map of the WordPress admin screens and the article that covers each input.

A re-scan of every includes/*.php file with inputs found no admin field without an article.

Fields

Coverage

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Security two-step (dscp_otp, setup, recovery codes, history) (`dscp_otp`)			Article 132.
Public lead form incl. consent_email, consent_sms			Article 134.
Entitlements, plans, messaging, receptionist, terms, records			Articles 41-55, 20, 22, 25-32.

Steps

1. Use the table to find the right article.

If something goes wrong

- Tell the owner of the manual if a screen is missing.

Contractor statuses and the emails they trigger

What Pending, Approved, Suspended and Rejected mean and which emails are sent.

Screen: **Settings → VisionScaper Contractors**.

Statuses

Status	How it gets set	Email sent
Pending	Shown for new applications (sorted first).	None from this screen.
Approved	You click Approve.	Subject "You're approved as a VisionScaper contractor", telling them to open the Contractor Hub.
Suspended	You click Suspend.	No email; in-app note "Your contractor account status changed: suspended."
Rejected	You click Reject.	Subject "Your VisionScaper contractor application", saying you cannot approve the business now and inviting a reply.

The email goes to the application email if valid, otherwise to the contractor's WordPress account email.

Steps

1. Click the status button you want.
2. Confirm "Saved." appears.
3. If you rejected someone, be ready for a reply to your site's sending address.

Tips

- Emails are sent with WordPress mail; make sure your site can send email.
- The email text is fixed in code; there is no field to edit it.

If something goes wrong

- No email arrived: check spam and your site's email setup.

Terms editor: the Save terms form

Edit your Terms of Service text, save it, or reset to the VisionScaper default.

Find it under **Settings → VisionScaper Terms**. Only users who can manage options (WordPress administrators) can open this screen. The screen controls the text on your Terms of Service page, which VisionScaper creates automatically and links from every screen.

> Warning: The screen itself tells you to have your attorney review any changes.

Fields

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Text box (`terms`)	The full Terms text shown to the public.	Edit the text. Example line: `## 5. Refunds.`	Prefilled with the VisionScaper default text (12 numbered sections).
Reset to the VisionScaper default text (`reset`)	If ticked when you save, clears your text so the default is used again.	Tick the box.	Unticked.
Save terms	Saves the text and sets the "Last updated" date to now.	Click.	
your Terms of Service page (link)	Opens the live page.	Click.	Opens in a new tab.

Steps

1. Open **Settings → VisionScaper Terms**.
2. Edit the text in the box.
3. Click **Save terms**.
4. Read: "Saved. Everyone will see the “Terms updated” notice the next time they use the app."
5. Click the page link to check how it looks.

Tips

- Because the version id comes from the text, any change makes people see the updated notice again.
- Saving unchanged text still resets the Last updated date.

If something goes wrong

- Odd characters or lost markup: the box is saved as plain text; HTML tags are stripped.

Terms: formatting codes and how acceptance is recorded

The simple formatting codes, the {brand} placeholder and what VisionScaper records when people accept.

Screen: **Settings → VisionScaper Terms**.

Formatting codes

Type this	Result
`## Heading`	A heading.
`- text`	A bullet.
Blank line	Starts a new paragraph.
`{brand}`	Replaced by your business name from your VisionScaper settings.
`<strong>` and `<em>`	Allowed inside lines for bold and italic; other tags are removed on the page.

How acceptance works

- Visitors see the notice "By continuing to use this website you agree to the Terms of Service" until they acknowledge it, and again when the terms change.
- People creating an account or applying as a contractor also tick a box.
- Each acceptance is stored with the version, method (notice, signup or contractor), time and the IP address. Only the last 20 entries per person are kept.
- The page shows "Last updated" with the date you last saved.

Steps

1. Write headings with `##`, bullets with `-`.
2. Use `{brand}` instead of typing your business name.
3. Save, then open the Terms page to review.

Tips

- The default text has 12 sections including contractor, hiring and canvassing rules.

If something goes wrong

- Headings not showing: the `##` must be at the start of the line followed by a space.

Records screen: look up a customer

Search contractor-only customer records by email or phone.

Find it under **Settings → VisionScaper Records**. Only users who can manage options (WordPress administrators) can open this screen. Page title: "Customer records (contractor-only)". Use it when a customer asks what is held about them or disputes a record.

The screen explains: Disputed records are hidden from contractors until you set them back to Active; Removed records are never shown again. Everything is factual and tied to a real invoice, appointment or quote.

Fields

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Customer email or phone (q)	Finds records for that customer.	A full email like `sam@example.com` or a 10-digit phone.	Empty shows only the active record count.
Look up	Runs the search.	Click.	

Steps

1. Open the screen. With the box empty you see "N active records."
2. Type the customer's full email or 10-digit phone.
3. Click **Look up**.
4. Read the table: When, Record, Recorded by, Status, Change.
5. To act on a row, see records-change-status.

Record types

Invoice unpaid 60+ days; Paid 30+ days late; Payment reversed / charged back; Cancelled within 24 hours; No-show / no access at a booked visit; Cancelled after materials were ordered. Records expire after 24 months per the default terms.

If something goes wrong

- "Enter a full email address or a 10-digit phone number." means the search text was not usable.
- "No records for this customer." means no match.
- Customers can also get these records through Tools → Export Personal Data.

Records screen: Disputed, Active, Removed and Save

Change a customer record's status and add a reason.

Screen: **Settings → VisionScaper Records**, after a successful lookup. Each row has a small form.

Fields

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Status dropdown (`set`)	Chooses the new status. Options: **Disputed (hide)**, **Active**, **Removed**.	Pick one.	First option, Disputed (hide), is preselected.
Reason (`why`)	A short note stored with the record and shown under the status.	e.g. "Customer paid, receipt seen".	Empty; only the first 250 characters are kept.
Save	Applies status, reason and update time.	Click.	

What each status does

- Disputed (hide): hidden from contractors while you review.
- Active: shown to contractors again.
- Removed: never shown again.

Steps

1. Look up the customer.
2. In the row, choose a status.
3. Type a reason.
4. Click **Save**; the page reloads and the Status column shows the change.

Tips

- Use Disputed while you investigate, then Active or Removed.

If something goes wrong

- Page returns without change: check the reason was typed and the dropdown set; reload and repeat.

Appearance screen: status and emergency buttons

The WordPress Appearance screen shows the site look status and four emergency reset buttons.

Find it under **Settings → VisionScaper Appearance**. Only users who can manage options (WordPress administrators) can open this screen. The look and layout are edited inside the app, not here: **Contractor Hub → Settings → 🎨 Appearance & layout → Whole site**, or My Account → Look & layout. This WordPress screen has no colour or font fields. It shows the current state and gives four emergency resets that affect only the site-wide layer; each business and person keeps their own choices.

Fields

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Open the Appearance editor	Opens the in-app editor (Hub settings).	Click.	
Site look	Shows the published site theme name, or "VisionScaper default".	Read only.	
Known-good copy	Date and time of the saved known-good look, or a dash.	Read only.	
Versions kept	Count of saved history versions.	Read only.	
Locked for everyone	Which categories are locked: colors, type, shape, density, motion, mode, layout; or "Nothing".	Read only.	
Role default layouts	Roles with a default layout, or "None (built-in order)".	Read only.	
Restore last known-good look	Publishes the saved known-good theme as the site look. Message: "Restored the last known-good site look."	Click.	Greyed out when none exists.
Back to the default look	Un-publishes the site theme (saving it to history as "Before the emergency reset"). Message: "The site look is back to the VisionScaper default."	Click.	Greyed out when nothing is published.
Remove all locks	Clears every lock. Message: "All locks removed."	Click.	
Clear role default layouts	Deletes all role default layouts. Message: "Role default layouts cleared."	Click.	

Steps

1. If the app looks wrong for everyone, open this screen.
2. Try **Restore last known-good look** first.
3. If still wrong, **Back to the default look**.
4. Use **Remove all locks** or **Clear role default layouts** only if people cannot change settings or menus are in the wrong order.
5. Confirm the green message.

If something goes wrong

- Buttons are greyed out: there is nothing to restore or reset.
- These buttons do not ask for confirmation.
- The in-app editor options (colors, fonts, shapes) are not on this screen (not covered here).

Messaging settings: Texts section

Every field in the Texts section of Settings → VisionScaper Messaging: Twilio or Telnyx, failover and Telnyx keys.

Find it in WordPress under **Settings → VisionScaper Messaging**. Only WordPress users who can manage site options (administrators) see it. This section picks which company sends customer texts and holds the Telnyx details. Twilio's own details live on the main Settings → VisionScaper page, not here.

Before you start

- To use Telnyx you need a Telnyx account, an API key, a sending number and (optionally) a messaging profile. See `get-telnyx-details`.
- To keep Twilio, finish the Twilio setup on the main VisionScaper settings first. See `get-twilio-details`.
- Follow each provider's current instructions to get these values.

Fields

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Text service `sms_provider`	Chooses which company sends every text on the site. Anything other than Telnyx is treated as Twilio.	Pick **Twilio** or **Telnyx** from the list.	Twilio
If it fails, try the other one `failover`	When the first company reports an error, VisionScaper tries the other company once. It does not retry when the problem is the customer's number (bad number, customer replied STOP), because another carrier would not help. The other company must be fully set up.	Tick to turn on.	Off
Telnyx key `telnyx_key`	The Telnyx API key VisionScaper sends with each text. Telnyx counts as ready only when this and the sending number are both saved.	Paste the key from Telnyx.	Empty. Hidden password box
Telnyx webhook secret `telnyx_whsec`	The shared secret used to check that a message arriving at the Telnyx webhook address is genuine. With no secret saved, every webhook is refused.	Paste a secret you also give to the sender of the webhook.	Empty. Hidden password box
Telnyx sending number `telnyx_from`	The "from" number used for Telnyx texts when none is chosen for a specific message.	Full number, for example +18605550123.	Empty. Shows the saved number as grey hint text
Telnyx messaging profile `telnyx_profile`	If filled in, sent to Telnyx with every text as the messaging profile ID.	The profile ID from Telnyx.	Empty (optional)
Webhook address	Read-only. The address Telnyx should call with delivery reports and incoming replies.	Select and copy it. Paste it into Telnyx where webhooks are set.	Shows your site's address ending in `/msg/webhook/telnyx`

Steps

1. Open **Settings → VisionScaper Messaging**.
2. Under **Texts**, choose a **Text service**.
3. If you chose Telnyx, paste **Telnyx key**, **Telnyx sending number** and, if you use one, **Telnyx messaging profile**.
4. Copy the **Webhook address** into your Telnyx account's webhook setting. Use the provider's current instructions.
5. In Telnyx, set a webhook secret. Paste the same value into **Telnyx webhook secret**.
6. Tick **If it fails, try the other one** only if both companies are set up.
7. Press **Save** (see the save steps in the next article).

What happens to a text

- VisionScaper adds "Reply STOP to opt out." to a Telnyx text if the words are missing.
- Telnyx texts are cut at 1,500 characters.
- A customer who replied STOP is never texted.

> Warning: VisionScaper checks webhooks with a generic signature (HMAC-SHA256 of the message body, sent in a header named `x-telnyx-signature`). The code says each provider's own signature method is not built in. Check with your provider that it can send this header (not verified in code).

If something goes wrong

- "Text messages aren’t set up yet." means the chosen service is missing its key or number.
- "That is a sample customer. Nothing was sent." means the number is a demo customer.
- Replies or delivery reports never show up: check the secret matches on both sides.

Steps to save and confirm

1. Fill in only the boxes you need. Secret boxes always show empty after saving.
2. Scroll to the bottom and press **Save**.
3. A green notice that says "Saved." appears at the top. That is the only confirmation the page gives.
4. Boxes for keys show "saved – leave blank to keep" in grey once a value is stored.

> Note: a blank key box means "keep what is saved". You cannot erase a saved key by emptying the box (not verified in code that any other way exists). To replace a key, type the new one.

Messaging settings: Email section

Every field in the Email section of Settings → VisionScaper Messaging: Resend, SendGrid and Amazon SES keys, secrets and region.

Find it in WordPress under **Settings → VisionScaper Messaging**. Only WordPress users who can manage site options (administrators) see it. This section lets you send marketing email through Resend, SendGrid or Amazon SES instead of the service chosen on the Marketing page. Postmark and the website's own mail are set on the Marketing page.

Before you start

- An account and API key at the service you pick: `get-resend-key`, `get-sendgrid-key` or `get-amazon-ses-keys`.
- A "send from" address set on **Settings → VisionScaper Marketing** (see `marketing-settings-email`). Email is refused until one is set.

Fields

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Email service `email_provider`	Picks the service that sends email. Options: **Use the one in Marketing settings**, **Resend**, **SendGrid**, **Amazon SES**.	Choose one.	"Use the one in Marketing settings" (blank)
Resend key `resend_key`	API key sent to Resend with each email.	Paste key.	Empty. Hidden
Resend webhook secret `resend_whsec`	Secret for checking delivery reports from Resend.	Paste secret.	Empty. Hidden
SendGrid key `sendgrid_key`	API key for SendGrid. Link and open tracking are turned off on these emails.	Paste key.	Empty. Hidden
SendGrid webhook secret `sendgrid_whsec`	Secret for SendGrid delivery reports.	Paste secret.	Empty. Hidden
Amazon access key `ses_key`	The access key half of your Amazon login for SES.	Paste key.	Empty. Hidden
Amazon secret key `ses_secret`	The secret half. Both halves must be saved or sending says the service is not connected.	Paste secret.	Empty. Hidden
Amazon webhook secret `ses_whsec`	Secret for Amazon delivery reports.	Paste secret.	Empty. Hidden
Amazon region (like us-east-1) `ses_region`	The Amazon region used to build the SES address.	`us-east-1`	If blank, `us-east-1` is used

Webhook addresses

The page only prints the Telnyx address. The code accepts reports at the same pattern for each service: your site address ending in `/dreamscaper/v1/msg/webhook/resend`, `/sendgrid` or `/ses`. They are used for delivered, bounced, spam-complaint and unsubscribe reports. A bounce marks that customer's email as bounced. A complaint or unsubscribe stops email to that customer.

Steps

1. Open **Settings → VisionScaper Messaging** and scroll to **Email**.
2. Choose an **Email service**.
3. Paste the key (or both Amazon keys) for that service. Fill the webhook secret and region if you use them.
4. Press **Save**. Then go to **Settings → VisionScaper Marketing** and use **Save & send me a test email**.

If something goes wrong

- "The email service isn’t connected yet." means a key is missing.
- "Set a sender email address first" means the Marketing page has no **Send from address**.
- "Email not sent:" followed by a message comes from the provider. Read it, fix it at the provider, try again.

Steps to save and confirm

1. Fill in only the boxes you need. Secret boxes always show empty after saving.
2. Scroll to the bottom and press **Save**.
3. A green notice that says "Saved." appears at the top. That is the only confirmation the page gives.
4. Boxes for keys show "saved – leave blank to keep" in grey once a value is stored.

> Note: a blank key box means "keep what is saved". You cannot erase a saved key by emptying the box (not verified in code that any other way exists). To replace a key, type the new one.

Messaging settings: Safety section

Every field in the Safety section: kill switch, approval requirements, message hiding, retention and monthly caps.

Find it in WordPress under **Settings → VisionScaper Messaging**. Only WordPress users who can manage site options (administrators) see it. This section holds the site-wide brakes on texting and emailing.

Fields

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Stop all texts and emails on this site (kill switch) `kill`	When ticked, every message is blocked with the reason "Messaging is switched off on this site". A setting in the site's code file can also force this on.	Tick to stop everything. Untick to resume.	Off
Only let a business text after its “Get ready to text” details are approved `require_registration`	Texts from a business are blocked ("Texting isn’t approved yet") until its status is approved.	Tick if carriers require registration.	Off
Only let a business send marketing email after the sender passes the email check `require_email_check`	Marketing email from a business is blocked until it has run the email check and passed. The check looks for SPF, DKIM and DMARC records on the sending domain.	Tick to require it.	Off
Hide phone numbers and email addresses inside saved messages `redact`	New messages are saved with emails shown as [email] and phone numbers as [phone]. It does not change old messages.	Tick to turn on.	Off
Keep conversations for (days, 0 = forever) `retention_days`	A daily job deletes saved messages and notes older than this. Delivery-event records are cleared after 30 days regardless.	Whole number, for example 90.	90. 0 keeps forever
Most texts per business per month (0 = no limit) `hard_cap_sms`	Once a business has sent this many texts in the current month (UTC), more are blocked: "The monthly limit for texts has been reached".	Whole number.	0 (no cap)
Most emails per business per month (0 = no limit) `hard_cap_email`	Same for email.	Whole number.	0 (no cap)

Steps

1. Decide whether you want approvals required. Turn on **Only let a business text after...** only after you are ready to approve businesses (see `messaging-text-approvals`), or nobody can text.
2. Set retention to match what you tell customers.
3. Enter caps only if you want a hard ceiling.
4. Press **Save** and wait for "Saved."

Tips

- The kill switch is the fastest way to stop a mistake.
- A business also has its own do-not-contact list. A customer who asked to stop is blocked whatever you set here.

If something goes wrong

- Businesses report "Texting isn’t approved yet": untick the requirement or approve them.
- Messages stopped suddenly: check the kill switch and the caps first.

Steps to save and confirm

1. Fill in only the boxes you need. Secret boxes always show empty after saving.
2. Scroll to the bottom and press **Save**.
3. A green notice that says "Saved." appears at the top. That is the only confirmation the page gives.
4. Boxes for keys show "saved – leave blank to keep" in grey once a value is stored.

> Note: a blank key box means "keep what is saved". You cannot erase a saved key by emptying the box (not verified in code that any other way exists). To replace a key, type the new one.

Messaging settings: Prices and message packs

Every field in the Prices section: cost per message, margin and the four message packs. All values are placeholders.

Find it in WordPress under **Settings → VisionScaper Messaging**. Only WordPress users who can manage site options (administrators) see it. This section holds your cost, margin and the extra message packs a business can buy. Every number shipped here is a placeholder, not approved. Set your own.

Before you start

- Packs are bought through Stripe. Without a Stripe secret key on the main settings page, buying says "Buying message packs isn’t available yet." See `get-stripe-keys`.

Fields

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Our cost per text / email (cents): first box `cost_sms`	Stored as your cost per text, in cents. (Effect not verified in code beyond saving.)	Number with decimals.	1.0 (placeholder, not approved; set your own)
Our cost per text / email (cents): second box `cost_email`	Stored as your cost per email, in cents. (Effect not verified in code beyond saving.)	Number with decimals.	0.1 (placeholder, not approved; set your own)
Margin % `margin_pct`	Stored margin, kept between 0 and 1000. (Effect not verified in code beyond saving.)	Number.	40 (placeholder, not approved; set your own)
Text pack s500: messages `pack_units_s500` and price `pack_price_s500`	A pack of texts a business can buy. Messages are used after the plan's allowance runs out.	Count of messages, and price in dollars.	500 messages, $10 (placeholder, not approved)
Text pack s2500: `pack_units_s2500`, `pack_price_s2500`	A larger text pack.	Same.	2,500 messages, $45 (placeholder, not approved)
Email pack e5000: `pack_units_e5000`, `pack_price_e5000`	An email pack.	Same.	5,000 emails, $15 (placeholder, not approved)
Email pack e25000: `pack_units_e25000`, `pack_price_e25000`	A larger email pack.	Same.	25,000 emails, $59 (placeholder, not approved)

Steps

1. Enter your own cost and margin.
2. Change pack sizes and prices to ones you approve. Prices are entered in dollars, for example 10.00.
3. To remove a pack from sale, set its messages or price to 0 and save.
4. Press **Save**.

> Warning: a pack saved with 0 messages or a 0 price is dropped. The page only draws boxes for packs that are saved, so a removed pack's boxes disappear and may not come back from this screen (not verified how to restore).

If something goes wrong

- A business cannot buy: check the Stripe key.
- A pack is missing: it was saved with a zero.

Steps to save and confirm

1. Fill in only the boxes you need. Secret boxes always show empty after saving.
2. Scroll to the bottom and press **Save**.
3. A green notice that says "Saved." appears at the top. That is the only confirmation the page gives.
4. Boxes for keys show "saved – leave blank to keep" in grey once a value is stored.

> Note: a blank key box means "keep what is saved". You cannot erase a saved key by emptying the box (not verified in code that any other way exists). To replace a key, type the new one.

Messaging settings: Businesses waiting for text approval

How to record carrier answers for each business that submitted its Get ready to text form (A2P 10DLC details).

Find it in WordPress under **Settings → VisionScaper Messaging**. Only WordPress users who can manage site options (administrators) see it. This section lists businesses that have sent in their "Get ready to text" details. You record what the carriers answered. VisionScaper does not send the registration to carriers itself: the code states the carrier API is not connected, so you register with your text provider yourself and then mark the result here. This is not legal advice.

The form each business fills in

The business fills this in its own Marketing area under Safety. You see the legal name and website here. The fields are:

Field	What it asks	Rule in the code
Legal business name `legal_name`	The registered name	At least 2 characters
Tax ID (EIN) `ein`	9-digit number	Like 12-3456789. Shown masked except the last 4
Website `website`	Business website	Must start with http:// or https://
Address `address`	Street address	At least 8 characters
Contact email `contact_email`	Where carriers can reach them	Must be a valid email
What will you text about? `use_case`	Updates about visits, quotes and invoices; Updates and offers; Offers and promotions	One of three
How do customers say yes to texts? `opt_in`	Explain consent	At least 30 characters
Sample text `sample`	Example message	At least 20 characters and must say "Reply STOP to opt out."

Fields on this screen

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Approval decision (unlabelled list next to each business) `decide[ID]`	Options: **Waiting**, **Approved by carriers**, **Rejected**. Approved lets that business text (when the approval requirement is on). Rejected sends it back so the business can fix and send again.	Pick the carrier's answer.	Waiting. Only works for businesses whose status is submitted
Reason, if rejected `reason[ID]`	Note saved with the decision, cut at 300 characters.	Plain words, for example "EIN did not match".	Empty

If no business is waiting, the page says "None."

Steps

1. Open **Settings → VisionScaper Messaging** and scroll to **Businesses waiting for text approval**.
2. Register the business with your text provider following its current instructions.
3. When the carrier answers, choose **Approved by carriers** or **Rejected** and add a reason.
4. Press **Save**.

If something goes wrong

- Nothing listed: the business has not submitted yet, or it already has an answer.
- Business still blocked: confirm **Only let a business text after...** and its status.

Steps to save and confirm

1. Fill in only the boxes you need. Secret boxes always show empty after saving.
2. Scroll to the bottom and press **Save**.
3. A green notice that says "Saved." appears at the top. That is the only confirmation the page gives.
4. Boxes for keys show "saved – leave blank to keep" in grey once a value is stored.

> Note: a blank key box means "keep what is saved". You cannot erase a saved key by emptying the box (not verified in code that any other way exists). To replace a key, type the new one.

AI Receptionist settings: Keys section

Every key and webhook box on Settings → VisionScaper AI Receptionist: Retell, Vapi, Bland, voice and phone keys.

Find it in WordPress under **Settings → VisionScaper AI Receptionist**. Only administrators see it. The top of the page shows two copyable addresses and the Keys section stores the provider keys for the AI phone assistant.

Before you start

Create accounts and keys with the services you use: `get-retell-keys`, `get-vapi-keys`, `get-bland-keys`, `get-elevenlabs-key`, `get-cartesia-key`, `get-deepgram-key`, `get-telnyx-details`. Follow each provider's current instructions.

Read-only addresses (top of page)

- **Webhook address**: your site address ending in `/receptionist/webhook/ENGINE`. Replace ENGINE with `retell`, `vapi` or `bland`. Give it to the voice service so it can send call reports.
- **The phone number’s voice address**: your site address ending in `/receptionist/voice`. Set it as the voice address on the phone number.

Fields

All are hidden password boxes. A blank box keeps the saved key; saved ones show "•••••• saved – leave blank to keep".

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Retell AI API key `retell_key`	Lets VisionScaper create agents and place calls through Retell. Retell is ready when this is saved.	Paste key.	Empty
Retell AI webhook secret `retell_secret`	Checks call reports are genuine (HMAC-SHA256 of the body in header `x-retell-signature`). With no secret, reports are refused.	Paste secret.	Empty
Retell AI phone address (SIP) `retell_sip`	Where an answered call is connected when the AI answers.	Paste the SIP address from Retell.	Empty
Vapi API key `vapi_key`	Same as Retell, for Vapi.	Paste key.	Empty
Vapi webhook secret `vapi_secret`	Same check, header `x-vapi-signature`.	Paste secret.	Empty
Vapi phone address (SIP) `vapi_sip`	Same, for Vapi.	Paste address.	Empty
Bland API key `bland_key`	Same, for Bland.	Paste key.	Empty
Bland webhook secret `bland_secret`	Same check, header `x-bland-signature`.	Paste secret.	Empty
Bland phone address (SIP) `bland_sip`	Same, for Bland.	Paste address.	Empty
ElevenLabs key `elevenlabs_key`	Saved for the ElevenLabs voice layer. (Effect not verified in code; no use found other than saving.)	Paste key.	Empty
Cartesia key `cartesia_key`	Saved for Cartesia voices. (Effect not verified in code.)	Paste key.	Empty
Deepgram key `deepgram_key`	Saved for Deepgram voices. (Effect not verified in code.)	Paste key.	Empty
Telnyx key `telnyx_key`	Saved for Telnyx phone numbers. (Effect not verified in code.)	Paste key.	Empty

Phone numbers themselves use the Twilio account saved on the main VisionScaper settings page.

Steps

1. Open the page. Copy the webhook address and replace ENGINE for each service you use.
2. Paste the keys you have. Leave the others empty.
3. Add each service's webhook secret and SIP address.
4. Scroll down and press **Save Changes**. "Saved." appears at the top.

If something goes wrong

- "The voice service isn’t connected yet." means the API key for the chosen engine is empty.
- Call reports do not arrive: the secret is missing or different from the provider's.
- Keys cannot be erased by leaving them blank.

AI Receptionist settings: Prices and packs

Every price field: provider cost per minute, margin, overage, monthly limit and minute packs. All values are placeholders.

On **Settings → VisionScaper AI Receptionist**, the section **Prices (placeholders – set your own)** controls what calls cost and what a business is charged. Minutes included in each plan are set elsewhere, under Settings → VisionScaper Plans (the "AI Receptionist minutes per month" setting and the "AI Receptionist" switch).

Before you start

Packs are bought through Stripe. See `get-stripe-keys`. Without it, buying says "Buying minutes isn’t available yet."

Fields

Every default is a placeholder, not approved; set your own.

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Retell AI – what the service costs you (cents per minute) `cost_retell`	Your cost per started minute for Retell. The business is charged this plus the margin, rounded up.	Whole number of cents.	12
Vapi – what the service costs you (cents per minute) `cost_vapi`	Same for Vapi.	Whole cents.	14
Bland – what the service costs you (cents per minute) `cost_bland`	Same for Bland.	Whole cents.	11
Margin on top (%) `margin_pct`	Added to the cost to get the charge. Example: cost 12 at 40 percent is charged as 17 cents (rounded up).	0 to 1000.	40
Overage after plan and packs (cents per minute; 0 = stop instead) `overage_cents`	What a business pays per minute after plan minutes and packs are used. At 0, calls stop when minutes run out.	Whole cents.	0
Hard monthly limit per business ($; 0 = none) `hard_cap`	Once a business has spent this much in a month, calls are blocked.	Whole dollars.	0
Minute pack p100: minutes `pack_min_p100` and price `pack_price_p100`	A prepaid pack. Minutes are used after the plan's minutes.	Minutes; price in dollars with cents.	100 minutes, $25
Minute pack p500: `pack_min_p500`, `pack_price_p500`	Larger pack.	Same.	500 minutes, $100
Minute pack p2000: `pack_min_p2000`, `pack_price_p2000`	Largest pack.	Same.	2,000 minutes, $320

Steps

1. Enter what each service really costs you per minute.
2. Choose a margin and overage.
3. Edit the pack minutes and prices.
4. Press **Save Changes**.

> Warning: a pack with 0 minutes or a 0 price is dropped when you save, and its boxes disappear from the page.

If something goes wrong

- Calls stopped: "The minutes in the plan are used up. Add a minute pack to keep going." means no overage is set. Add a pack or raise overage.
- "The site’s monthly limit for this business has been reached." is your hard monthly limit.

AI Receptionist settings: Privacy and safety

The retention, number-hiding and kill switch fields on the AI Receptionist settings page.

On **Settings → VisionScaper AI Receptionist**, the **Privacy and safety** section controls how long call records are kept and lets you stop all calling. Only administrators see it.

Fields

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Keep transcripts and recording links for (days; 0 = forever) `retention_days`	A daily job blanks the transcript, recording link and intake details of calls older than this. The call record itself stays.	Whole number of days.	90. 0 keeps forever
Hide phone numbers and emails in saved transcripts `redact`	When on, phone numbers and emails are hidden in newly saved transcripts. (Exact masking text not verified.)	Tick **On**.	Off
Kill switch `kill`	"Stop all AI Receptionist calling and campaigns on this site now". Nothing is dialled, campaigns do not run, and calls are refused with "The AI Receptionist is switched off site-wide." A setting in the site's code can also force this.	Tick to stop. Untick to resume.	Off

Steps

1. Set the retention you tell customers.
2. Tick **On** to hide numbers and emails if you want it.
3. Tick the kill switch only in an emergency.
4. Press **Save Changes** and wait for "Saved."

Tips

- The assistant always tells callers it is an AI. No setting removes that rule.

If something goes wrong

- Calls will not start: untick the kill switch, then check keys and limits.
- Old transcripts are still there: the purge runs daily, not at once.

Marketing settings: Email service and sender

Every field in Health and Email service on Settings → VisionScaper Marketing: Postmark, stream, from address, sender name, webhook.

Find it in WordPress under **Settings → VisionScaper Marketing**. Only administrators see it. Contractors run their own marketing from Contractor Hub; this page is the setup they share.

Health box

Read-only line showing last run time, messages due now, messages sent in 24 hours, which email service is in use, whether Twilio is ready and whether AI is on. If sending has not run in 20 minutes, a red warning tells you to add a real server cron job every 5 minutes and add `DISABLE_WP_CRON` to the site's configuration file.

Before you start

- A Postmark account, a Server API token and a Broadcast message stream: `get-postmark-key`.
- A sender address verified in Postmark, with DKIM and Return-Path records, plus a DMARC record. Follow Postmark's current instructions.

Fields

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Send marketing email with `m[email_provider]`	Two radio buttons. **Postmark** (recommended): separate Broadcast stream, bounce and spam handling. **This website's own mail**: uses your SMTP plugin, no bounce handling, daily limits at many mailboxes.	Choose one.	This website's own mail
Postmark Server API token `m[postmark_token]`	The token VisionScaper uses to send through Postmark. Saved tokens show as dots. Typing dots or leaving it keeps the old one.	Paste token from Postmark's server API tokens.	Empty
clear `m[postmark_token_clear]`	Appears only when a token is saved. Tick it and save with the box empty to erase the token.	Tick to remove.	Unticked
Broadcast stream ID `m[postmark_stream]`	The Postmark stream used for marketing. Other mail uses the "outbound" stream. Lowercase letters, numbers, - and _ only.	`broadcast`	broadcast
Send from address `m[from_email]`	The address emails come from. Replies go to each contractor's own email. Postmark is used only when this is a valid email.	`hello@mail.yoursite.com`	Empty
Sender name `m[from_format]`	The name shown as sender, up to 80 characters. `{company_name}` becomes the contractor's business name.	`{company_name} via VisionScaper`	`{company_name}`
Postmark webhook	Read-only address containing a private key. Add it in Postmark on your Broadcast stream with Delivery, Bounce, Spam Complaint and Subscription Change ticked.	Select, copy, paste into Postmark.	Generated automatically

Steps

1. Choose **Postmark**.
2. Paste the token, stream and from address, and set the sender name.
3. Copy the webhook into Postmark.
4. Press **Save & send me a test email**. The notice says "Saved — test email sent to" your address, or "Saved, but the test failed:" and why.

If something goes wrong

- Test fails: check the token, stream name and that the from address is verified.
- Mail goes to spam: add DKIM and DMARC records.
- Postmark is silently not used: the from address is empty or invalid.

Marketing settings: Texts and missed calls

The marketing-text notes, missed-call text-back switch and contractor number boxes on the Marketing settings page.

On **Settings → VisionScaper Marketing**, the section **Texts & missed calls (Twilio)** switches on missed-call text-back and assigns a phone number to each contractor.

What the notes say

- Marketing texts use the Twilio account saved in Settings → VisionScaper. They need their own A2P 10DLC campaign in Twilio (use case Marketing or Mixed); a Customer care campaign alone does not allow promotions.
- Marketing texts go only to customers who gave written consent, name the business and honor STOP.
- Delivery receipts are requested automatically.

Before you start

- Twilio account connected. Buy one Twilio number per contractor and add it to your Messaging Service. Follow Twilio's current instructions (`get-twilio-details`).
- The page quotes about $1.15 per month per number as an example only.

Fields

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Offer missed-call text-back to contractors `m[voice]`	Makes missed-call text-back available. Calls ring the contractor's phone; if unanswered the caller can leave a voicemail and gets a text right away.	Tick to offer.	Off
Contractor numbers: one box per approved contractor (header "Their VisionScaper (Twilio) number") `m[numbers][user id]`	Ties a Twilio number to that contractor so incoming calls and replies go to the right business. Numbers are converted to full international form. Blank or invalid boxes are dropped.	`+18605550123`	Empty. Lists up to 500 approved contractors; "No approved contractors yet." if none
Voice address (read-only)	In Twilio, set the number's "A call comes in" to this address (ends `/crm/voice`).	Copy and paste.	Shown only text
Message address (read-only)	Set "A message comes in" to this address (ends `/crm/twilio`).	Copy and paste.	Shown only text

Steps

1. Tick **Offer missed-call text-back to contractors**.
2. Type each contractor's Twilio number in their row.
3. In Twilio, paste both addresses on each number.
4. Press **Save**.
5. Contractors choose which phone rings in Marketing → Controls.

If something goes wrong

- Texts are blocked: finish the A2P campaign and the business's text approval.
- Calls do not arrive: re-check the addresses in Twilio.

Marketing settings: Costs and limits

The cost per text, cost per email and messages-per-run fields, plus the Save buttons on the Marketing page.

On **Settings → VisionScaper Marketing**, **Costs & limits** sets the numbers used for campaign ROI and how fast mail goes out. A note below the form says marketing allowances (campaigns, automations, emails and texts per month) are edited under Settings → VisionScaper Plans & billing.

Fields

Defaults are placeholders, not approved; set your own.

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Cost per text segment `m[sms_cost]`	Used for each campaign's ROI. Kept between 0 and 1 dollar.	Dollars, for example 0.0123.	0.0123
Cost per email `m[email_cost]`	Used for each campaign's ROI. Between 0 and 1 dollar.	0.0015	0.0015
Messages per 5-minute run `m[tick_max]`	Most messages sent each run, all contractors together. Between 10 and 1000. Big campaigns go out over several runs.	80	80

Buttons

- **Save**: stores every field on the page.
- **Save & send me a test email**: saves, then emails the logged-in administrator a test. The message says which service sent it.

Steps

1. Enter your real per-message costs.
2. Set messages per run. Lower is gentler on sending reputation.
3. Press **Save**. A blue notice shows the result.

If something goes wrong

- Values reset to limits: numbers outside the ranges are pulled back in.
- Campaigns go slowly: raise **Messages per 5-minute run**, and make sure scheduled sending runs regularly (see the Health box).

Plans page: billing switch, free trial and trial allowances

Turn contractor billing on, set the free trial length, trial plan, phone check and the smaller trial allowances.

Where: WordPress admin → **Settings → VisionScaper Plans**. Only a user who can manage options (an Administrator) sees it. This first block of the page controls whether contractors are billed at all, and how their one free trial works. Everything below the "Stripe setup" list on the page is a form that you save with **Save plans**.

Before you start

- To charge anyone you need Stripe keys. Add them under Settings → VisionScaper → Selling extra AI credits first (see [get-stripe-keys]). Without a Stripe secret key the page shows a yellow notice, and every approved contractor keeps full access for free.
- The phone check needs Twilio ([get-twilio-details]).

Fields

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Turn on contractor billing (`ds[on]`)	The master switch. Off: every approved contractor has full access and nobody is limited by plan. On: each contractor gets one free trial, then must pay. Turning it on records the date and shows "On since ..." under the box.	Tick it only after the Stripe setup list is done.	Off. Contractors approved before you switch it on get one grandfathered trial, so nobody is cut off.
Free trial days (`ds[trial_days]`)	Length of the free trial for a new contractor.	A whole number from 0 to 90. Example: 30.	30.
plan drop-down after "days on the" (`ds[trial_plan]`)	Which plan's features the trial shows. The options are the four plans by their current names (Starter, Professional, Business, Pro+ unless you renamed them).	Pick the plan you want trial users to experience.	Professional.
Require a phone number verified by text (needs Twilio) (`ds[otp]`)	Makes a new contractor confirm their phone with a text code before the trial starts. If Twilio is not set up the page adds a note and the check is skipped; email verification and the card still apply.	Tick to require it.	On.
AI credits (under **Trial allowances**, `ds[trial_ai_credits]`)	How many AI credits a trial account gets. It is a cap: the trial plan's own amount is used if it is smaller.	Whole number 0 to 100000.	100 (placeholder, not approved; set your own).
landscape plans (under **Trial allowances**, `ds[trial_plans]`)	How many new landscape plans a trial account can make.	Whole number 0 to 1000.	2 (placeholder, not approved; set your own).

Every other feature of the trial plan is fully on during the trial. Only these two allowances are smaller, to protect AI costs. They rise to the paid plan's full amounts when the paid plan starts.

Steps

1. Open Settings → VisionScaper Plans.
2. Make sure the Stripe warning notice is not showing. If it is, add your Stripe keys first.
3. Set **Free trial** days and pick the trial plan.
4. Tick or untick the phone verification box.
5. Set the two trial allowances.
6. Leave **Turn on contractor billing** unticked until you finish [plans-stripe-setup-and-save-buttons].
7. Scroll to the bottom of the plan table and press **Save plans**. A green "Saved." message confirms it.

Tips

- Each business gets only one free trial. VisionScaper remembers email, phone, card, Stripe customer, business name and town, address, license and account, so deleting an account or reinstalling does not reset it.
- Use **Grant a second trial (exception)** in the contractors list for a rare second trial ([plans-contractor-subscriptions-and-owner-actions]).

If something goes wrong

- Nothing seems to change: you must press **Save plans**; each field is only stored when the form is saved.
- Trial users lack a feature: check the trial plan's column in the plan table.
- Texts never arrive: the phone check is skipped when Twilio is not ready.

Plans page: what happens when a payment fails

Set the day each stage starts, what pauses, the suspension day, fair-use alert and data-retention period.

Where: Settings → VisionScaper Plans, rows **When a payment fails**, **Fair use** and **Keep data after cancelling**. Administrators only. These settings step a contractor down gradually after a failed payment instead of cutting them off. Days are counted from the first failed payment, and paying at any stage restores everything instantly.

The stages in order

1. **Day 0 notice:** full access, a quiet banner, one email (and a text if the contractor opted in to billing texts).
2. **Reminder:** full access, a stronger banner, another email.
3. **Restricted:** everything works except what costs you money (the five boxes below).
4. **Read-only:** view, export and pay only; hidden from homeowners; a final warning with the suspension date.
5. **Suspended:** "Suspended - Payment Required". Nothing is deleted. Reminders go out after 7, 30 and 60 days.
6. **Eligible for deletion flag:** after the days you set, the contractor is flagged on this page. Nothing is deleted automatically.

Fields

Field (exact label)	What it does	What to enter	Default / notes
From day N - reminder (`ds[stages][reminder]`)	Day the stronger reminder starts.	Whole number 1 to 60.	4 (placeholder, not approved; set your own).
From day N - restricted (`ds[stages][restricted]`)	Day the costly extras pause. Saved value is never lower than the reminder day.	1 to 60.	8 (placeholder).
AI (pictures, AI Quoter) (`ds[restrict_ai]`)	When ticked, AI pictures and the AI Quoter pause in the restricted stage.	Tick to pause.	On.
new landscape plans (`ds[restrict_plans]`)	Pauses creating new landscape plans in the restricted stage.	Tick to pause.	On.
buying credits / storage (`ds[restrict_buy]`)	Pauses buying extra credits or storage packs.	Tick to pause.	On.
uploads over (`ds[restrict_uploads]`)	Pauses uploads bigger than the size on its right.	Tick to pause.	On.
uploads over ... MB (`ds[big_upload_mb]`)	The size above which an upload counts as "large".	1 to 500.	10.
automatic follow-up texts (emails still go) (`ds[restrict_auto_sms]`)	Pauses automatic texts in the restricted stage. Appointment reminders, receipts and invoices keep going to their customers.	Tick to pause.	On.
From day N - read-only (`ds[stages][readonly]`)	Day the account becomes view, export and pay only. Never lower than the restricted day.	1 to 60.	11 (placeholder).
Day N - suspended (`ds[grace_days]`)	The day the account is suspended. Saved as at least one day after the read-only day.	2 to 90.	14 (placeholder).
After N days unpaid (`ds[deletion_days]`)	After this many unpaid days the contractor is flagged here as eligible for deletion under your retention policy.	30 to 3650.	90 (placeholder).
Fair use - "Alert me when an unlimited plan creates N landscape plans in a month" (`ds[fair_plans]`)	Adds a note to the contractor's row when someone on an unlimited plan reaches that number in a month. Nothing is blocked.	0 to 100000; 0 means never.	100 (placeholder).
Keep data after cancelling - "at least N months" (`ds[retention_months]`)	The retention period shown to contractors. Nothing is ever deleted automatically.	1 to 120.	12 (placeholder).

Steps

1. Decide the day numbers. Keep them rising: reminder, restricted, read-only, suspended.
2. Type each number in the matching box inside the numbered list on the page.
3. Tick the pause boxes you want in the restricted stage.
4. Set the fair-use number and the retention months.
5. Press **Save plans** at the bottom of the plan table. The page saves the stages in order for you.

Tips

- If you type days out of order, the code raises the later one so the order always holds.
- To give one contractor more time, use **Give more time to pay (days)** ([plans-contractor-subscriptions-and-owner-actions]).

If something goes wrong

- A contractor says a tool is paused: check which stage their row shows (for example "past_due - restricted (day 9)").
- The day numbers you typed changed after saving: they were out of order and were corrected.

Plans page: Stripe setup list and the Save and Create buttons

Follow the Stripe setup list, copy the webhook address, and use Save plans and Create these plans in Stripe.

Where: Settings → VisionScaper Plans, the numbered **Stripe setup** list and the buttons **Save plans** and **Create these plans in Stripe**. Administrators only.

Before you start

Get your Stripe keys ([get-stripe-keys]) and paste them under Settings → VisionScaper → Selling extra AI credits. The **Create these plans in Stripe** button only appears when a Stripe secret key is saved. For all Stripe screens, follow Stripe's current instructions; the page names the settings to look for.

What each item does

Item	What it does	What to do
Webhook address (read-only code box, ends in `/wp-json/dreamscaper/v1/stripe`)	The address Stripe sends payment messages to. You copy FROM it; you cannot type in it.	In Stripe's webhook settings add an endpoint with this address and the events `customer.subscription.created`, `customer.subscription.updated`, `customer.subscription.deleted`, `invoice.paid`, `invoice.payment_failed` (keep `checkout.session.completed`).
Customer portal step	Lets contractors manage their own card and plan.	In Stripe turn on "Update payment methods", "View invoices", "Switch plans" and "Cancel subscriptions (at end of period)".
Revenue recovery step	Matches the stages in [plans-payment-failure-stages].	Page recommends Smart Retries for 2 weeks, mark the subscription as unpaid when all retries fail, and turn off Stripe's own failed-payment emails (VisionScaper sends the reminders).
Save plans	Stores everything on the page (billing switch, trial, stages, plan table). Changed prices and limits are written to the audit log ([entitlements-audit-log-and-recent-refusals]).	Press it after any change.
Create these plans in Stripe	Asks for confirmation ("Create a Stripe product and monthly + yearly prices for each plan, using the saved amounts?"), then creates a product named "VisionScaper" plus the plan name for each plan, with a monthly and a yearly price in US dollars, and fills in the Stripe price ID boxes. A plan with a price of 0 gets no price for that period.	Save your amounts first, then press it once.

Steps

1. Fill in names and prices in the plan table ([plans-table-names-prices-and-stripe-ids]) and press **Save plans**.
2. Press **Create these plans in Stripe** and confirm. Or paste price IDs you made yourself.
3. Add the webhook address and events in Stripe.
4. Set up the customer portal and revenue recovery settings in Stripe.
5. Tick **Turn on contractor billing** and press **Save plans** again.

Tips

- Pressing **Create these plans in Stripe** again makes new Stripe products, so press it only when you need them.
- Changes apply to new subscriptions straight away. To change what existing subscribers pay, create a new Stripe price; Stripe keeps them on the old price until you move them.

If something goes wrong

- A red notice "Stripe said: ..." shows Stripe's own error text. Fix the cause (usually the key) and try again.
- The Create button is missing: no Stripe secret key is saved.

Plans page: plan names, taglines, badge, included lists, prices and Stripe IDs

Every identity and price row in the plan table, one column per plan.

Where: Settings → VisionScaper Plans → **Plans** table. There is one column per plan (shipped as Starter, Professional, Business and Pro+). The first nine rows of the table are described here. Administrators only.

The plan keys behind the columns are `starter`, `pro`, `business` and `proplus`. Prices below are shipped as placeholders, not approved; set your own. Shipped monthly/yearly placeholders are 59/590, 129/1290, 249/2490 and 499/4990 dollars.

Fields (the same rows repeat in each plan column)

Field (exact label)	What it does	What to enter and example	Default / notes
Name (`ds[plans][KEY][name]`)	The plan's name on pricing cards, in drop-downs and in Stripe. If left blank the shipped name is used.	Short name, e.g. "Growth".	Starter, Professional, Business, Pro+.
Tagline (`...[tag]`)	One short line under the name. Also used as the Stripe product description.	e.g. "A growing company".	Shipped taglines (e.g. "Owner + one crew leader").
Most popular badge (radio `ds[popular]`)	Marks one plan with the "most popular" badge. Only one plan can hold it; choosing one clears the others.	Click the circle in the column you want.	Professional.
What's included (`...[includes]`)	The plain-English list on the pricing card and in the public pricing feed.	One benefit per line. Start with "Everything in Starter, plus:" for upper plans.	Shipped lists. It is text only; it does not switch any feature.
Not included (`...[not]`)	Optional list of what the plan leaves out.	One item per line. Can be empty.	Starter lists four items; others empty.
Price per month ($) (`...[month]`)	Monthly price in US dollars, used for Create-in-Stripe and the monthly-revenue figure.	A number, e.g. 99. Rounded to cents; never below 0.	Placeholder, not approved; set your own.
Price per year ($) (`...[year]`)	Yearly price in dollars.	Number, e.g. 990.	Placeholder, not approved.
Stripe price ID - monthly (`...[price_month]`)	The Stripe price a contractor is charged monthly. Only letters, numbers and underscores are kept.	Starts with `price_`; filled by **Create these plans in Stripe** or paste your own.	Empty.
Stripe price ID - yearly (`...[price_year]`)	Same, for yearly billing.	Paste or let the button fill it.	Empty.

Steps

1. Edit the nine rows in each of the four columns.
2. Keep "What's included" honest with the switches and limits further down the table ([plans-table-limits], [plans-table-feature-switches]).
3. Press **Save plans**. Confirm with the green "Saved." message.
4. Check the pricing: public prices stay hidden until you tick the approval box in [entitlements-prices-approval-and-upgrade-link].

Tips

- A price change is written to the audit log with the old and new value.
- Editing a price here does not change Stripe by itself; see [plans-stripe-setup-and-save-buttons].

If something goes wrong

- The badge is on two plans: it cannot be; save again after clicking one circle.
- A price ID will not save as typed: other characters (dashes, spaces) are removed.

Plans page: the limit rows (credits, storage, customers, employees and more)

Every numeric limit row in the plan table, what it counts, and how to set unlimited.

Where: Settings → VisionScaper Plans → **Plans** table, rows that hold a number. Each row has one text box per plan column (named `ds[plans][KEY][f][LIMIT_KEY]`). Administrators only.

How a limit works

- Type a whole number to set the amount that plan gets.
- Type **unlimited** (or leave the box empty) to mean no limit. This is stored as -1.
- Type **0** to give the plan none of it.
- Monthly limits reset on the 1st of each month (UTC).
- Every row prints its help text under the label, followed by "Use "unlimited" for no limit."

Fields

All values below are shipped defaults and are placeholders, not approved; set your own. The same limits also appear in the Entitlements plan matrix ([entitlements-plan-matrix-limits]); both screens edit the same stored value.

Field (exact label)	What it controls	Key	Starter	Professional	Business	Pro+
Field employees	Crew members you can schedule and send jobs to. You, the owner, aren’t counted.	`employees`	1	5	15	50
Crews	Named crews your employees belong to, for scheduling and dispatch.	`crews`	1	2	5	unlimited
AI credits per month	VisionScaper AI pictures (AI Erase, Make it real, Season & light…) — 1 credit each. Your free daily credits are used first, bought credits last.	`ai_credits`	50	200	750	2500
Landscape plans per month	New measured 2D landscape plans (with automatic quantities) you create on a property. Editing an existing plan is always free.	`plans_month`	0	3	15	unlimited
Storage (GB)	Designs, property photos, job photos and documents you keep online.	`storage_gb`	5	25	100	500
Active customers	Customers in your CRM (past and lost customers don’t count).	`clients`	unlimited	unlimited	unlimited	unlimited
Quotes & proposals per month	New quotes you create each calendar month.	`quotes_month`	unlimited	unlimited	unlimited	unlimited
New VisionScaper requests per month	Homeowners who request a quote from you through Find a Contractor. When you reach it, you’re hidden from new homeowners until next month.	`leads_month`	unlimited	unlimited	unlimited	unlimited
Automatic reminder rules	How many reminders you can schedule before each appointment.	`reminder_rules`	2	6	unlimited	unlimited
Saved quick replies	One-tap answers you reuse in the Inbox.	`snippets`	5	50	unlimited	unlimited
Marketing emails per month	Campaign and automation emails to your customers. Messages about appointments, quotes and invoices don’t count.	`mkt_emails_month`	500	5000	20000	100000
AI Receptionist minutes per month	Call minutes included each month (extra minutes come from prepaid packs or overage). Placeholder value – set your own.	`rcp_minutes_month`	0	100	400	1500
API requests per hour	How many API calls your keys can make each hour. Placeholder value – set your own.	`api_per_hour`	0	0	1000	10000
Marketing texts per month	Campaign and automation texts (needs Text messages). Appointment, quote and invoice texts don’t count.	`mkt_sms_month`	0	500	2000	10000

Steps

1. Find the row in the table; read the grey help line.
2. In each plan column type a number, `unlimited`, or 0.
3. Press **Save plans** at the end of the table. Each changed value is written to the audit log with before and after.
4. Check it: reload the page; the box shows your value (or "unlimited").

Tips

- Two rows have an extra warning in their help: **AI Receptionist minutes per month** and **API requests per hour** say "Placeholder value - set your own."

- The free trial replaces **AI credits per month** and **Landscape plans per month** with the smaller trial allowances ([plans-billing-switch-and-free-trial]).
- **New VisionScaper requests per month**: when a contractor reaches it they are hidden from new homeowners until next month.

If something goes wrong

- A negative number other than -1 becomes -1 (unlimited). Use 0 for none.
- Letters other than "unlimited" are read as 0.

Plans page: the feature switch rows (checkboxes per plan)

Every on/off feature row in the plan table, what each switch turns on, and how to set it.

Where: Settings → VisionScaper Plans → **Plans** table, rows with a checkbox in every plan column. Administrators only. A ticked box gives that plan the feature; an empty box withholds it. The box is named `ds[plans][KEY][f][FEATURE_KEY]`.

Fields

Shipped ticks below are placeholders, not approved plan assignments; set your own. "Costly" features are the ones that cost you money to run.

Field (exact label)	What it controls	Key	Starter	Professional	Business	Pro+
Route Optimizer	Plans the best order and drive time for each crew's day.	`route_optimizer`	off	on	on	on
Job costing & profitability	Budgets, overhead and profit per job, and the profitability reports.	`job_costing`	off	off	on	on
QuickBooks sync	Sends invoices and payments to QuickBooks Online.	`qbo`	on	on	on	on
AI Quoter	AI writes your scope of work and builds elevation views from a design.	`ai`	off	on	on	on
Text messages	Follow-ups, appointment reminders and alerts by text.	`sms`	off	on	on	on
Custom intake questions	Your own questions in the homeowner's request form, per service.	`intake`	on	on	on	on
Inbox tools	Needs-reply tracking, reply timer and quick replies.	`inbox_pro`	off	on	on	on
Calendar sync	Your schedule in Google, Apple or Outlook calendar.	`calendar_feed`	on	on	on	on
Work gallery on your profile	A curated gallery of your best finished jobs.	`gallery`	off	off	on	on
Featured placement	Shown first (labelled "Featured") to homeowners in your service area.	`featured`	off	off	off	on
AI marketing (campaigns & automations)	Email & text campaigns, automated follow-ups, win-backs, seasonal and upsell automations, and the AI marketing assistant. Every plan finds opportunities and sends review requests and reminders.	`marketing`	off	on	on	on
AI Receptionist	A phone agent that answers calls, collects the customer's details, books visits and makes calling campaigns.	`receptionist`	off	on	on	on
Vendor bills	Enter, approve and pay supplier bills against purchase orders.	`vendor_bills`	off	off	on	on
Profit-and-loss & cash summary	Company profit and loss and a cash-in, cash-out summary.	`pnl`	off	off	on	on
Xero sync	Sends invoices and payments to Xero.	`xero`	off	off	on	on
Employee goals & reviews	Set goals and write reviews for your people.	`reviews`	off	on	on	on
Customer financing	Offer customers a financing option on an estimate.	`financing`	off	off	on	on
Card reader & Tap to Pay	Take card payments in person and record them on the invoice.	`card_reader`	off	on	on	on
API & Zapier	API keys, webhooks and Zapier for your own tools.	`api`	off	off	on	on
Outside lead sources	Leads from Angi, Thumbtack and Google Local Services land in your inbox, tagged.	`lead_sources`	off	on	on	on
AI review replies	Draft replies to your online reviews for you to approve.	`review_ai`	off	off	on	on
Website chat	A chat box for your website that turns visitors into leads.	`chat_widget`	off	on	on	on
Inventory	Stock counts, reorder points and materials reserved for jobs.	`inventory`	off	off	on	on
Postcards	Send printed postcards to a list of customers.	`postcards`	off	off	on	on

Steps

1. Read the help line under the row label.
2. Tick or untick the box in each plan column.
3. Press **Save plans**. A green "Saved." appears; each changed switch is written to the audit log.
4. To preview the result as a customer, use the tester in [view-as-customer-tester].

Tips

- The same switches appear in the Entitlements plan matrix; editing either place changes one stored value ([entitlements-plan-matrix-switches]).
- Some features also need a service set up elsewhere: **Text messages** needs Twilio; **QuickBooks sync** and **Xero sync** need those connections; **AI Receptionist** uses paid voice and phone services.

- Features that are not built yet are not on this table; they are listed as "not built" on the Entitlements page.

If something goes wrong

- A contractor still cannot see a feature: confirm the box in their plan's column and check for an account override ([entitlements-account-override]).
- Existing subscribers lose a feature after you untick it: yes, changes take effect straight away for the plan.

Plans page: the Contractors table and owner actions

Read the revenue line and per-contractor rows, and use Extend trial, Comp, Suspend, Restore and the other owner actions.

Where: Settings → VisionScaper Plans, at the bottom under **Contractors**. Administrators only. It lists every approved contractor (first 500), starting with past-due ones. Your own owner account shows "owner (free)" and has no action form: you are always on the top plan for free.

Reading the table

- **Monthly recurring revenue** adds, for active and past-due contractors, the plan's monthly price, or one twelfth of the yearly price. Because prices are placeholders until approved, treat the figure as an estimate.
- The counts line shows how many contractors are in each status, plus "Trials ever" and "converted to paid".
- Columns: **Business**, **Status** (with failed-payment count and stage/day when past due), **Plan**, **Trial / renews**, **Last payment**, **Notes** (recent trial, fair-use or deletion flags).

The action form (last column)

Control (label)	What it does	What to enter	Default
Action drop-down (`do`)	Picks the action below.	Choose one.	Extend trial.
Plan drop-down (`plan`)	The plan used by "Give free access (comp)" and "Set plan". Other actions ignore it.	Choose a plan.	First plan in list.
days box (`days`)	Number of days for "Extend trial", "Give more time to pay", "Restore" (new trial length when there is no Stripe subscription) and "Grant a second trial".	1 to 90.	14.
Reason (`why`)	Why you are doing it; saved in the contractor's history. **Required** for Extend trial, comp, grace, pause and second trial.	Short sentence.	Empty.
Apply	Runs the action.	Press once.	

Options in the drop-down and their effect:

- **Extend trial:** adds the days to a running trial (and updates Stripe if a subscription exists).
- **Give free access (comp):** status becomes "comped" on the chosen plan (Pro+ if none valid).
- **End free access:** removes comped status.
- **Give more time to pay (days):** pushes the non-payment clock back for a past-due contractor.
- **Suspend now:** status "paused", shown as suspended.
- **Restore:** back to active (with a Stripe subscription) or a new trial.
- **Grant a second trial (exception):** a new trial on the trial plan.
- **Set plan:** changes the plan only.

Steps

1. Find the contractor's row.
2. Choose the action, plan and days; type a reason.
3. Press **Apply**. The page returns to that row with "Saved."
4. If you see "Please write a reason - every exception is recorded", add a reason and try again.

If something goes wrong

- "Contractor not found." means the account is not an approved contractor.
- **Extend trial** or **Give more time to pay** appear to do nothing when the contractor is not trialing or not past due.

Entitlements page: how VisionScaper decides who may do what

The order of checks behind every yes or no, the error codes, billing banners and the monthly usage counters.

Where: Settings → VisionScaper Entitlements. Administrators only. The page is the one place that lists every feature and limit, per plan, and holds your audited exceptions. It also shows two warning bars at the top, described here. This article explains the rules behind it so the later articles make sense.

The banners at the top

- **Billing is switched OFF.** Every contractor is treated as on the top plan ("comped: billing off"). Nobody is charged or limited by plan. The link takes you to VisionScaper Plans ([plans-billing-switch-and-free-trial]).
- **Billing is on but Stripe is not connected.** Accounts keep the plan and state on record, nothing is opened up, and nobody can start or change a subscription until the Stripe key is added.
- After saving, a green "Saved and written to the audit log.", "Nothing changed." or a red error message appears.

How a decision is made

For each request from a contractor or team member, the server answers in this order, using trusted data only:

1. Which company is the person acting for (their own approved business, or the company that lists them and has not switched them off)?
2. Is the company the site owner, or is billing off? Then it is allowed ("comped").
3. What is the subscription state? No subscription, a missing plan, paused, cancelled, an expired trial, or a past-due account in the read-only or suspended stage means changes are refused. Reading records you already have stays open ("read only"). Paying and exporting stay open.
4. Past due and in the restricted stage: costly features whose "restrict" box you ticked on the Plans page are refused ([plans-payment-failure-stages]).
5. The plan's value for that feature, or an audited account override ([entitlements-account-override]), or the catch-up window ([entitlements-catch-up-window]).
6. For a limit: used so far against the limit.

Error codes

Code	Meaning
`FEATURE_NOT_INCLUDED`	The plan does not have it. The message names the plan that does.
`SUBSCRIPTION_REQUIRED`	No subscription yet, or the record is missing or inconsistent.
`USAGE_LIMIT_REACHED`	The allowance is used up. Nothing is lost.
`SUBSCRIPTION_INACTIVE`	Paused, cancelled, trial over, or payment too late.

Two kinds of feature

- **records:** reading what you already have stays open when the plan is lowered or paused; only creating stops.
- **premium:** the feature itself stops, even to look.

Usage counters

Monthly allowances (AI credits, new landscape plans, marketing emails and texts) use one counter per company, per feature and per month (UTC), with a ledger of every use. A request that would pass the limit is refused. Retries are harmless, a failed operation gives its credit back, and a use is recorded as reserved, committed, released, refused or adjusted. Contractors see used/limit/left in their app. There is no input for the counters on this page; limits are set in the matrix ([entitlements-plan-matrix-limits]).

Tips

- If a customer says "I'm blocked", look at **Recent refusals** ([entitlements-audit-log-and-recent-refusals]).
- A route not yet classified in code is protected by default: it needs an active subscription to change anything.

If something goes wrong

- Everyone has access though you set limits: billing is probably off (check the top banner).
- Nobody can subscribe: Stripe key missing ([get-stripe-keys]).

Entitlements page: how to read the plan matrix (feature registry)

What each column, group heading, kind, cost and cell in the Plan matrix means, with the full list of 52 entries.

Where: Settings → VisionScaper Entitlements → **Plan matrix**. Administrators only. The matrix is the registry of every product capability, one row each, with one column per plan. The same values power the app, the website pricing feed and the server checks. There is no second copy: it reads and writes the settings on VisionScaper Plans.

Reading a row

- **Group heading rows** (shaded) split the list: Customers & Sales, Finance & Reports, Marketing & Growth, Schedule & Field, Team & Training, Design Studio, Settings & Integrations, and Planned (not available yet).
- **First column, Entitlement:** the bold name, then a grey sentence saying what it covers, then sometimes an extra note (for example that paid voice services are used and billed per minute).
- **Second column, Id:** a stable code like `scheduling.route_optimization` (group.name), then a small line "kind - status - cost X".
- **Plan columns:** one per plan, headed with the plan's current name. The cell shows one of four things:
- a **checkbox** for a switch (kind flag);
- a **text box with a small unit** (credits, minutes, GB...) for a number (kind limit or metered);
- "✓ **all plans**" for built-in features (kind base) that every subscriber has;
- "*not built*" for planned features that do not exist yet.

The kinds

Kind	Meaning
`base`	Included for every subscriber. Cannot be changed.
`flag`	On or off per plan.
`limit`	A number per plan; unlimited = -1.
`metered`	A limit that is a monthly allowance counted in the ledger.
`planned`	Marketed or intended, not built; shows "not built" and is never sold as included.

Status is "implemented" or "planned". **Cost** (low, medium, high) is a hint of how much the feature costs you to run (paid image calls and voice services are high). It does not change any behaviour.

Full registry

Plan keys connect a row to the matching row on the Plans page.

Id	On-screen name	Group	Kind	Plan key	Access	Cost
`crm.customers`	Customers	Customers & Sales	limit	`clients`	records	low
`crm.leads`	Requests from homeowners	Customers & Sales	limit	`leads_month`	records	low
`estimates.create`	Quotes & proposals	Customers & Sales	limit	`quotes_month`	records	low
`ai.quote_generation`	AI Quoter	Customers & Sales	flag	`ai`	premium	high
`invoices.manage`	Invoices & payments	Finance & Reports	base	`-`	records	low
`intake.custom_questions`	Custom intake questions	Customers & Sales	flag	`intake`	records	low
`profile.gallery`	Work gallery	Marketing & Growth	flag	`gallery`	records	low
`profile.featured`	Featured placement	Marketing & Growth	flag	`featured`	premium	low
`scheduling.calendar`	Calendar & scheduling	Schedule & Field	base	`-`	records	low
`scheduling.calendar_sync`	Calendar sync	Schedule & Field	flag	`calendar_feed`	records	low
`scheduling.route_optimization`	Route Optimizer	Schedule & Field	flag	`route_optimizer`	premium	medium
`receptionist.agent`	AI Receptionist	Marketing & Growth	flag	`receptionist`	premium	high
`receptionist.minutes`	AI Receptionist minutes	Marketing & Growth	limit	`rcp_minutes_month`	premium	low
`employees.manage`	Field employees	Schedule & Field	limit	`employees`	records	low
`crews.manage`	Crews	Schedule & Field	limit	`crews`	records	low
`time_tracking.basic`	Time tracking & timesheets	Schedule & Field	base	`-`	records	low
`training.lms`	Training & certifications	Team & Training	base	`-`	records	low
`reports.profitability`	Job costing & profitability	Finance & Reports	flag	`job_costing`	premium	low
`reports.operations`	Operations reports	Finance & Reports	base	`-`	records	low
`messaging.sms`	Text messages	Marketing & Growth	flag	`sms`	records	medium
`messaging.inbox_tools`	Inbox tools	Customers & Sales	flag	`inbox_pro`	records	low

Id	On-screen name	Group	Kind	Plan key	Access	Cost
messaging.reminder_rules	Automatic reminder rules	Marketing & Growth	limit	reminder_rules	records	low
messaging.quick_replies	Saved quick replies	Marketing & Growth	limit	snippets	records	low
marketing.opportunities	Marketing opportunities, review requests & reminders	Marketing & Growth	base	-	records	low
automation.marketing	Marketing campaigns & automations	Marketing & Growth	flag	marketing	records	medium
automation.marketing_emails	Marketing emails per month	Marketing & Growth	metered	mkt_emails_month	records	low
automation.marketing_sms	Marketing texts per month	Marketing & Growth	metered	mkt_sms_month	records	medium
ai.landscape_visualization	AI pictures (credits)	Design Studio	metered	ai_credits	premium	high
design.plan_generator	Landscape plans	Design Studio	metered	plans_month	records	medium
storage.extended	Online storage	Settings & Integrations	limit	storage_gb	records	medium
integrations.quickbooks	QuickBooks sync	Finance & Reports	flag	qbo	records	low
finance.vendor_bills	Vendor bills	Finance & Reports	flag	vendor_bills	records	low
reports.pnl	Profit-and-loss & cash summary	Finance & Reports	flag	pnl	records	low
integrations.xero	Xero sync	Finance & Reports	flag	xero	premium	low
team.reviews	Employee goals & reviews	Team & Training	flag	reviews	records	low
financing.consumer	Customer financing	Finance & Reports	flag	financing	premium	low
payments.card_reader	Card reader & Tap to Pay	Finance & Reports	flag	card_reader	premium	low
api.access	API & Zapier	Settings & Integrations	flag	api	premium	low
leads.sources	Outside lead sources	Customers & Sales	flag	lead_sources	records	low
reviews.ai_replies	AI review replies	Marketing & Growth	flag	review_ai	premium	low
chat.widget	Website chat	Marketing & Growth	flag	chat_widget	premium	low
inventory.manage	Inventory	Schedule & Field	flag	inventory	records	low
marketing.postcards	Postcards	Marketing & Growth	flag	postcards	premium	low
design.versions	Design version history	Design Studio	base	-	records	low
team.library	Company library	Team & Training	base	-	records	low
security.account	Security	Settings & Integrations	base	-	records	low
data.account_export	Account data export & erase	Settings & Integrations	base	-	records	low
automation.history	Automation run history	Settings & Integrations	base	-	records	low
api.rate	API requests per hour	Settings & Integrations	limit	api_per_hour	records	low
portal.white_label	White-label customer portal	Planned (not available yet)	planned	-	premium	low
org.multi_location	Multi-location	Planned (not available yet)	planned	-	premium	low
workflows.custom	Custom workflows	Planned (not available yet)	planned	-	premium	low

Steps

1. Scroll to the group you care about.
2. Read the grey description and the Id line.
3. Find the plan column. Edit as described in [entitlements-plan-matrix-switches] or [entitlements-plan-matrix-limits].

Tips

- Rows with access "premium" stop entirely when a plan lacks them; "records" rows only stop creating.
- Only flag, limit and metered rows can be edited.

If something goes wrong

- A row says "not built": it cannot be turned on; the feature does not exist yet.
- A plan column heading looks different from before: you renamed the plan on the Plans page.

Entitlements page: Plan matrix number boxes (limits and monthly allowances)

Each numeric row of the Plan matrix, how to type a value or unlimited, and how to save with a reason.

Where: Settings → VisionScaper Entitlements → **Plan matrix**. Administrators only. Each number row has one text box per plan (named `ent[m][PLAN][ID]`), with the unit printed beside it.

The rows (14 rows x 4 plans = 56 boxes)

Every plan column gets the same kind of box, so the pattern is set once here. Shipped values are placeholders, not approved; set your own (see [plans-table-limits] for the shipped numbers per plan).

Row (exact on-screen name)	Id	Kind	Unit	Plan key
Customers	`crm.customers`	limit	customers	`clients`
Requests from homeowners	`crm.leads`	limit	requests	`leads_month`
Quotes & proposals	`estimates.create`	limit	quotes	`quotes_month`
AI Receptionist minutes	`receptionist.minutes`	limit	minutes	`rcp_minutes_month`
Field employees	`employees.manage`	limit	employees	`employees`
Crews	`crews.manage`	limit	crews	`crews`
Automatic reminder rules	`messaging.reminder_rules`	limit	rules	`reminder_rules`
Saved quick replies	`messaging.quick_replies`	limit	replies	`snippets`
Marketing emails per month	`automation.marketing_emails`	metered	emails	`mkt_emails_month`
Marketing texts per month	`automation.marketing_sms`	metered	texts	`mkt_sms_month`
AI pictures (credits)	`ai.landscape_visualization`	metered	credits	`ai_credits`
Landscape plans	`design.plan_generator`	metered	plans	`plans_month`
Online storage	`storage.extended`	limit	GB	`storage_gb`
API requests per hour	`api.rate`	limit	requests	`api_per_hour`

How to type a value

- A whole number sets the amount (for example 200 credits).
- Type `unlimited` or leave the box empty for no limit (stored as -1).
- 0 means the plan has none of it.

Reason (required)

Below the table is **Reason for this change (required, kept in the audit log)** (`ent[reason]`). The field is marked required and the server also refuses a changed cell without a reason.

Steps

1. Change the boxes you want in any plan column.
2. Type a reason, for example "Raised Business credits after cost review".
3. Press **Save plan matrix**.
4. Look for "Saved and written to the audit log." The audit log at the bottom shows a "plan_value" line for each changed cell, with before and after.

Tips

- Only boxes whose value differs are saved. If nothing changed you see "Nothing changed."
- If one cell is refused, saving stops at that cell; cells before it were already saved.
- The result is the same as editing on VisionScaper Plans; the Plans page save also writes audit lines ("Plans page").

If something goes wrong

- "Give a reason for the change." Add text in the Reason box.
- "That entitlement can't be switched here (it is built in, or not built yet)." The row is base or planned.

Entitlements page: Plan matrix checkboxes (feature switches)

Each on/off row of the Plan matrix, how to tick it for a plan, and what the built-in and not-built rows mean.

Where: Settings → VisionScaper Entitlements → **Plan matrix**. Administrators only. Switch rows hold one checkbox per plan, named `ent[m][PLAN][ID]` and labelled for screen readers "NAME on PLAN".

The rows (24 rows x 4 plans = 96 checkboxes)

Same pattern in every plan column: tick = the plan has the feature. Shipped ticks are placeholders, not approved plan assignments; set your own.

Row (exact on-screen name)	Id	Access	Cost	Plan key
AI Quoter	`ai.quote_generation`	premium	high	`ai`
Custom intake questions	`intake.custom_questions`	records	low	`intake`
Work gallery	`profile.gallery`	records	low	`gallery`
Featured placement	`profile.featured`	premium	low	`featured`
Calendar sync	`scheduling.calendar_sync`	records	low	`calendar_feed`
Route Optimizer	`scheduling.route_optimization`	premium	medium	`route_optimizer`
AI Receptionist	`receptionist.agent`	premium	high	`receptionist`
Job costing & profitability	`reports.profitability`	premium	low	`job_costing`
Text messages	`messaging.sms`	records	medium	`sms`
Inbox tools	`messaging.inbox_tools`	records	low	`inbox_pro`
Marketing campaigns & automations	`automation.marketing`	records	medium	`marketing`
QuickBooks sync	`integrations.quickbooks`	records	low	`qbo`
Vendor bills	`finance.vendor_bills`	records	low	`vendor_bills`
Profit-and-loss & cash summary	`reports.pnl`	records	low	`pnl`
Xero sync	`integrations.xero`	premium	low	`xero`
Employee goals & reviews	`team.reviews`	records	low	`reviews`
Customer financing	`financing.consumer`	premium	low	`financing`
Card reader & Tap to Pay	`payments.card_reader`	premium	low	`card_reader`
API & Zapier	`api.access`	premium	low	`api`
Outside lead sources	`leads.sources`	records	low	`lead_sources`
AI review replies	`reviews.ai_replies`	premium	low	`review_ai`
Website chat	`chat.widget`	premium	low	`chat_widget`
Inventory	`inventory.manage`	records	low	`inventory`
Postcards	`marketing.postcards`	premium	low	`postcards`

Rows you cannot change

- Built-in (base) rows show "✓ all plans". Examples: Invoices & payments, Calendar & scheduling, Time tracking & timesheets.
- Planned rows show "not built": White-label customer portal, Multi-location, Custom workflows.

Steps

1. Tick or untick the boxes you want.
2. Fill **Reason for this change** (required).
3. Press **Save plan matrix**.
4. Confirm the green "Saved and written to the audit log." and a "plan_value" line in the audit log ([entitlements-audit-log-and-recent-refusals]).

Tips

- A feature that costs money (cost high) should usually stay off lower plans.
- Marketing "campaigns" and the two marketing allowances are separate rows: the switch plus a monthly emails box and a monthly texts box.
- To give one customer a feature without changing the plan, use an override ([entitlements-account-override]).

If something goes wrong

- Your tick did not stick: the Reason was empty (the browser blocks the form) or another cell was refused. Read the red message.

Entitlements page: Prices & upgrade destination

Approve plan prices so visitors can see them, and set where the See plans button leads.

Where: Settings → VisionScaper Entitlements → **Prices & upgrade destination**. Administrators only. This small form decides whether prices are visible to the public, and where upgrade buttons send people.

Shipped prices are proposals until you approve them. On a brand-new install the approval box is empty, so prices stay hidden. A site that had already saved its plans before this feature counts as approved.

Fields

Field (exact label)	What it does	What to enter	Default / notes
I have approved the plan prices - show them to visitors and in upgrade prompts (`ent[prices_approved]`)	Off: the public pricing feed (`/wp-json/dreamscaper/v1/plans/public`) returns the plans with no prices. On: it includes monthly and yearly prices. The feed never includes Stripe IDs or keys.	Tick only once the numbers on VisionScaper Plans are your final, approved prices.	Off for a new install.
Where "See plans" goes (leave empty for the app's Plan & billing screen) (`ent[upgrade_url]`)	The web address of upgrade prompts and error messages. Empty means the app's own Plan & billing screen.	A full URL such as https://example.com/pricing, or empty.	Empty.
Reason (`ent[reason]`)	Written to the audit log next to the approval change. Optional here; if blank the log says "(no reason given)".	Short sentence.	Empty.
Save	Stores the three fields and writes a "prices_approved" audit line with the old and new value.	Press once.	

Steps

1. Finish prices on VisionScaper Plans first ([plans-table-names-prices-and-stripe-ids]).
2. Open this form. Tick the approval box only when you are sure.
3. Enter an upgrade URL if you want a pricing page of your own.
4. Type a reason and press **Save**.
5. Check the audit log for a "prices_approved" line.

Tips

- Unticking the box hides prices again straight away.
- Approving prices does not change what Stripe charges.

If something goes wrong

- Visitors still see no prices: the box was not saved ticked, or a cache holds an old copy of the feed.
- The upgrade link goes to the wrong page: check the URL; anything that is not a valid URL is cleared.

Entitlements page: give one account a feature or take it away

Set a single contractor account override for a switch or limit, with an end date and a required reason, and clear it.

Where: Settings → VisionScaper Entitlements → **Give one account a feature (or take it away)**, and the overrides table beneath it. Administrators only. An override replaces the plan's value for one contractor and one feature. It does not change the plan. Use it for goodwill, a trial of a feature, or to remove one.

Before you start

You need the contractor's WordPress user id (the number in the user's edit link). Overrides do not apply to the site-owner account or when billing is off, because those are already unlimited.

Fields

Field (exact label)	What it does	What to enter and example	Default / notes
Contractor user id (`ent[org]`)	The account the override applies to. Must be an existing contractor.	Number, e.g. 42.	Required.
Entitlement (`ent[key]`)	The feature or limit. The list holds every switch, limit and metered row, shown as "Name (id)". Built-in and planned rows are not listed.	Pick one.	First in list.
Value (1/0 for a switch, or a limit; -1 = unlimited) (`ent[value]`)	1 turns a switch on, 0 off. For a limit, a number, or -1 for unlimited. 0 on a limit removes it.	e.g. 1, 0, 500, -1.	1.
For how many days (empty = until cleared) (`ent[days]`)	Makes the override expire after that many days. Empty keeps it until you clear it.	Whole number from 1, or empty.	Empty.
Reason (required) (`ent[reason]`)	Stored with the override and in the audit log.	e.g. "Goodwill after outage".	Required.
Save override	Saves it (replacing an earlier override for the same account and feature).	Press once.	
Clear (button at the end of each row in the table)	Deletes that override immediately and writes an "override_clear" audit line.	Press on the row.	

The overrides table (latest 50) shows **Account**, **Entitlement**, **Value**, **Ends** ("until cleared" or a date), **Reason**.

Steps

1. Enter the user id and choose the entitlement.
2. Set the value and, if wanted, the days.
3. Type the reason and press **Save override**.
4. Check the table for the new row and the audit log for "override_set".
5. To undo, press **Clear** on the row.

If something goes wrong

- "Choose a contractor account and give a reason." The id is not a contractor or the reason is empty.
- "That entitlement can't be overridden." Built-in and planned rows cannot be.
- The customer still sees the old limit: the override may have expired, or the account is the owner.

Entitlements page: the catch-up window

Let accounts that subscribed before today keep Route Optimizer and job costing until a date you choose.

Where: Settings → VisionScaper Entitlements → **Catch-up window**. Administrators only.

Before version 2.38.0 some features on the plan cards (Route Optimizer, job costing) were not actually switched off for lower plans. With billing on, this window lets accounts that subscribed before you open it keep the features you pick until a date, so nobody loses something without notice. It is off unless you open it. Every use is labelled "grandfathered" in the decision. When open, the page shows "Open now:" with the features, the end date and the reason.

Fields

Field (exact label)	What it does	What to enter	Default / notes
Route Optimizer (checkbox `ent[keys][]`)	Includes Route Optimizer in the window.	Tick to include.	Ticked only if already open.
Job costing & profitability (checkbox `ent[keys][]`)	Includes job costing in the window.	Tick to include.	Same.
Until (date) (`ent[until]`)	The last day (to 23:59:59 UTC) the window works.	Pick a date.	60 days from today (or the current end date).
Reason (`ent[reason]`)	Stored with the window and in the audit log. Required when any box is ticked.	e.g. "Notice period for lower plans".	The current reason, if open.
Open / update (untick everything to close)	Saves the window. With no boxes ticked it closes the window.	Press once.	

Only accounts whose subscription was created before the moment you open the window qualify, and only for a feature their plan lacks. They then get it as on (or unlimited).

Steps

1. Tick the features to keep open.
2. Choose the end date.
3. Type a reason.
4. Press **Open / update**.
5. Confirm "Open now: ..." appears and a "grandfather_set" audit line exists.
6. To close it, untick both boxes and press the same button.

If something goes wrong

- "Choose the features and give a reason." Tick at least one feature and add a reason.
- Leaving the date empty gives a window that has already ended (not guarded in code); always pick a date.

Entitlements page: Audit log and Recent refusals

Read the two tables at the bottom: every plan, price, override and window change, and why a request was refused.

Where: the bottom of Settings → VisionScaper Entitlements. Administrators only. These two tables are read-only: they have no inputs. Nothing can be edited or deleted here.

Audit log

Shows the latest 100 changes. Columns: **When (UTC)**, **Who** (WordPress login, or #id), **Action**, **Subject**, **Entitlement**, **Before**, **After**, **Reason**.

Action value	When it is written
`plan_value`	A plan's switch or limit changed, from this page or from VisionScaper Plans (reason "Plans page").
`price_change`	A monthly or yearly price changed on the Plans page.
`override_set` / `override_clear`	An account override was saved or cleared.
`grandfather_set`	The catch-up window was opened, updated or closed.
`prices_approved`	The approval box was saved.

Recent refusals

Heading shows "Recent refusals (last N)". Up to 50 rows from the last 200 refusals are stored. Columns: **When**, **Account** (#id), **Route** (method and path), **Entitlement** (id) and **Code** (one of the four error codes in [entitlements-how-a-decision-is-made]). Only the account, route and reason code are kept.

Steps

1. Ask the customer roughly when the error happened.
2. Find their account number (#id) in **Recent refusals**.
3. Read the code. `FEATURE_NOT_INCLUDED`: change the plan or add an override ([entitlements-account-override]). `USAGE_LIMIT_REACHED`: raise the limit. `SUBSCRIPTION_INACTIVE` or `SUBSCRIPTION_REQUIRED`: look at their row on VisionScaper Plans ([plans-contractor-subscriptions-and-owner-actions]).

If something goes wrong

- A refusal is missing: only requests from signed-in contractors and team members to protected routes are logged.
- The log looks empty: nothing has changed or been refused yet.

View as customer: test the Hub on any plan or billing state

Use the View as customer button on the Contractor Hub to see what a customer on any plan or payment state would see.

Where: the Contractor Hub (the front-end app), not a WordPress settings page. A small floating button appears at the bottom left: **View as customer** (it reads "Viewing as: ..." while a test is on). Only administrators see it; the server sends the list to administrators only.

I could not find a tool called "Try a customer's plan" in the code. The View as tester is the tool that does that job. (not verified in code: any other tool by that name)

What it does

You see the real Hub as a customer in the chosen state would, with nothing charged or changed. It applies only to your own account and expires by itself after 8 hours. Billing actions (checkout, plan change, cancel, card portal, verification codes) are refused with a "Test view" message. Your real records still count, so usage bars compare your real data with that plan's limits.

Controls

Control (exact label)	What it does
View as customer button	Opens or closes the panel titled "Test the customer experience".
← Back to my own account (shown only during a test)	Ends the test and reloads.
No plan yet (new sign-up) (group Start)	Shows the Hub with no subscription.
Free trial (Start)	Trial on your trial plan; trial length shown is shorter than the full trial by 12 days.
Starter plan (paid), **Professional plan (paid)**, **Business plan (paid)**, **Pro+ plan (paid)** (group Paid plans; names follow your plan names)	An active paid subscription on that plan.
Payment overdue: some tools paused (group When payment fails)	Past due, at the restricted-stage day from your Plans settings, on the Professional plan.
Payment overdue: read-only	Past due at the read-only day.
Suspended	Account paused.
Subscription ended	Cancelled.

Steps

1. Open the Contractor Hub while signed in as an administrator.
2. Click **View as customer** at the bottom left.
3. Click a state. The page reloads and the button turns orange: "Viewing as: ...".
4. Look around. Check what is locked and what the upgrade prompts say.
5. Click **View as customer** again and choose **← Back to my own account**.

If something goes wrong

- No button: you are not an administrator or you are not on the Hub.
- A billing button says "Test view": that is deliberate; end the test first.
- It ended on its own: tests last 8 hours.

Settings → Business profile: every field

Every box on the Business profile tab of Hub Settings: name, contact, licence, address, service radius, services and logo.

Open the Contractor Hub, choose **Settings** in the Hub menu, then pick the **Business** group and the **Business profile** tab. Only approved contractor accounts (the business owner) use this screen. It holds the details homeowners and your documents show about your business: name, contact details, licence, service area, services and logo.

> Note: The same form is used when a business first applies. On the application, two extra tick boxes (Terms of Service and confidentiality) appear. They do not appear once you have a saved profile.

Before you start

- Your business phone (at least 10 digits), a working business email and your town. The save fails without them.
- Your state contractor or HIC licence number, if you have one.
- A logo image if you want one shown (the picture is shrunk to 600 pixels on its longest side and must be 2 MB or less after saving).

Fields

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Logo (button, shows a tag icon until you add one)	Lets you upload your logo. It is saved with the profile and used wherever VisionScaper shows your business.	Tap **Logo**, choose a PNG or JPG from your device. The preview updates at once; the logo is stored only when you press Save.	Optional. Picture is shrunk to 600 px on the longest side. Server limit 2 MB.
Business name * `business`	Your company name. Shown on your contractor page, proposals and messages.	e.g. Green Row Landscaping. At least 2 characters.	Required. Up to 120 characters.
Your name `contact`	The contact person name used when VisionScaper addresses or signs as you.	e.g. Dana Ruiz.	Optional. Up to 80 characters. Filled from your account name if empty on first use.
Business phone * `phone`	The phone number customers and documents show.	e.g. 860-555-0100.	Required, at least 10 digits. Up to 30 characters.
Business email * `email`	The email address for your business. Must be a valid address.	e.g. office@greenrow.example.	Required.
Website `website`	Your own website address, shown with your profile.	Start with https://, e.g. https://greenrow.example.	Optional. Anything that is not a valid web address is dropped when saved.
Years in business `years`	Shown as your experience.	A whole number such as 12.	Optional. Kept between 0 and 100.
License # (state contractor / HIC registration) `license`	Your licence or registration number, shown to build trust.	The example in the box is HIC.0123456 (a sample, not yours). Type your own number.	Optional. Up to 80 characters.
We carry general liability insurance `insured`	Tells homeowners you are insured.	Tick only if it is true.	Checkbox, off by default. Administrators check licence and insurance before approving applications.
Street `address`	First line of your business address. Suggests addresses as you type; picking one fills Town, State and ZIP for you.	Start typing and pick your address.	Optional. Up to 200 characters.
Town * `town`	Your town. Together with the street, state and ZIP it is looked up on the map to place you for the Find a Contractor search.	e.g. Hartford.	Required. Up to 80 characters.
State `state`	Two-letter state.	e.g. CT.	Up to 2 letters in the box; the server turns full names into abbreviations.
ZIP `zip`	Postal code.	e.g. 06103.	Optional. Up to 12 characters.
Service radius (miles) `radius`	How far from your address you work.	A whole number of miles, e.g. 30.	Default 25. Kept between 5 and 200.
Services (15 choice chips) `services`	Chips for the kinds of work you offer. Tap to switch each on or off (a tick shows it is on).	Tap each service you sell: Landscape design, Planting, Mulch & stone, Lawn installation, Patios & walkways, Retaining walls, Landscape lighting, Fencing, Drainage & grading, Tree work, Lawn care, Irrigation, Snow removal, Outdoor kitchens, Water features.	None selected by default. Up to 30 services are kept.

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
About your business `bio`	A short description shown on your profile.	What you do best, how long you have done it and what customers like. Placeholder text in the box shows this idea.	Optional. Up to 2000 characters.
Save business profile (button)	Saves every field above, re-finds your map position from the address and refreshes your session.	Press once after editing.	Shows Saved. If the profile is new the button reads Apply to be a VisionScaper contractor.
Open the Get started guide (button, in the Get started guide card)	Opens the six-step guide from an empty account to your first quote. It also has a button that fills the Hub with clearly labelled sample data and one button that removes it.	Press when you want the guided tour.	Card appears under the profile when the guide is available.

Steps

1. Open **Settings** in the Hub menu. The **Business** group is selected first and **Business profile** is the first tab.
2. Tap **Logo** if you want to add or change your picture.
3. Fill the six boxes at the top: Business name, Your name, Business phone, Business email, Website and Years in business. The ones marked with * are required.
4. Enter your **License #** and tick **We carry general liability insurance** only if it is true.
5. Under **Where you work**, type your Street and pick the suggestion. Check Town, State and ZIP, then set **Service radius (miles)**.
6. Under **Services**, tap every chip that matches work you do.
7. Write **About your business**.
8. Press **Save business profile**. A small Saved message confirms it.

Tips

- Pick the address from the suggestion list instead of typing every box. It fills Town, State and ZIP in one go.
- Your map position is worked out from the address you save. If the address is wrong, homeowners near you may not find you.
- Edit and Save again any time. Nothing else is deleted when you change the profile.

If something goes wrong

- **Please add your business name, phone, email and town.** One of the required values is missing or too short. Phone needs 10 digits and email must be valid.
- **Nothing seems to save.** The message appears in red under the form. Read it, fix the box and press Save again.
- **Logo missing after saving.** The picture must be 2 MB or less once saved. Try a smaller image.

Settings → Appearance & layout: scope, search and Look tab

Every control at the top of Appearance & layout and on its Look tab: scope, mode, 13 ready-made looks, brand colors, tint and AI theme.

Open the Contractor Hub, choose **Settings**, pick the **Business** group, then the **Appearance & layout** tab. This tab changes how VisionScaper looks and how its screens are arranged. It has up to seven inner tabs: Look, Colors, Text, Shape & spacing, Layout, History and (site owner only) Site controls. This article covers the top of the screen and the **Look** tab. The others have their own articles.

Everything you change previews live on the whole app. Changes are checked for readability. Nothing is kept until you save or publish.

Before you start

- Decide who the change is for. The first control, **Change the look for**, picks the scope.
- Contractors see **Just me** and **My business**. The site owner also sees **Whole site**. A homeowner sees only **Just me**.
- If the site owner has locked a group of settings, you see a note such as "The site owner has locked these settings" and the matching controls are switched off.

Fields

Top of the screen

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Change the look for	Chooses whose screens your changes apply to. Just me: only you, on every device you sign in on. My business: your Hub and, if you switch it on, the proposals, invoices and pages your customers see. Whole site: everyone (site owner only).	Tap one of the buttons: Just me, My business, Whole site.	Only the scopes you may use appear. Contractors start on My business.
Search settings (search box)	Finds a setting by name (examples shown: “font size”, “dark mode”, “menu order”) and jumps to the inner tab that has it.	Type at least 2 letters, then tap a result.	Search covers the Look, Colors, Text, Shape & spacing, Layout, History and Site controls tabs.
Undo and Redo buttons	Step back or forward through the changes you made in this session (up to 60 steps).	Tap Undo after a change you do not want.	Greyed out when there is nothing to undo or redo.
Readability line with a Details button	Shows whether your colors pass the contrast checks (for example “Passes readability checks”, or how many colors VisionScaper adjusted).	Tap Details to see each check.	Information only.
Inner tabs: Look, Colors, Text, Shape & spacing, Layout, History, Site controls	Switch between groups of settings.	Tap a tab.	History is shown to signed-in people. Site controls shows only for the Whole site scope.

Look tab

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Light, dark or high contrast `mode`	Sets the base brightness of every screen.	Tap one: Dark, Light, Match my device, High contrast. “Match my device” follows each phone or computer’s own light/dark setting.	Default Light. Locked by the site owner if “Light / dark mode” is locked.
Ready-made looks: VisionScaper (light, default)	Goes back to the look you inherit (the site or business look, or the VisionScaper default) and replaces your changes.	Tap the tile. Preview appears at once.	Every preset can be undone with Undo or Reset.
Ready-made looks: Dark	Sets mode to dark.	Tap the tile.	Changes only the mode.
Ready-made looks: Match my device	Sets mode to follow the device.	Tap the tile.	Changes only the mode.
Ready-made looks: High contrast	High-contrast mode, text size 110%, heading weight 900, border 2 px.	Tap the tile.	Built for easy reading.
Ready-made looks: Earth tones	Dark mode with green primary, amber secondary and the Earth background tint.	Tap the tile.	Colour look.
Ready-made looks: Premium slate	Dark mode, blue primary, gold secondary, Slate tint, plain backgrounds, Inter font, heading weight 700 and slightly smaller card corners.	Tap the tile.	Colour look.
Ready-made looks: Ocean	Dark mode with teal primary, yellow secondary and the Ocean tint.	Tap the tile.	Colour look.
Ready-made looks: Sunrise (light)	Light mode, green primary, orange secondary, Warm stone tint, Nunito font.	Tap the tile.	Colour look.
Ready-made looks: Clean & classic (light)	Light mode, green primary, gold secondary, Neutral gray tint, plain backgrounds, Source Serif font, heading weight 700.	Tap the tile.	Colour look.

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Ready-made looks: Compact	Compact spacing and text size 95%.	Tap the tile.	Changes only spacing and text size.
Ready-made looks: Comfortable	Comfortable spacing.	Tap the tile.	Changes only spacing.
Ready-made looks: Spacious	Spacious spacing and text size 105%.	Tap the tile.	Changes only spacing and text size.
Ready-made looks: Large text	Text size 120%, Atkinson Hyperlegible font and icons at 115%.	Tap the tile.	Changes only text and icons.
Brand / primary `base.accent`	Your main brand color: main buttons, selected tabs, links and highlights.	Tap the color swatch and choose a color (it is stored as a hex code).	Default #0f7378. Locked if the site owner locked Colors and branding.
Secondary `base.secondary`	Warnings and “new” highlights.	Tap the swatch and choose.	Default #f6c445.
Main call to action `base.cta`	The big start button color.	Tap the swatch and choose.	Default #f6c445.
Background tint `base.neutral`	Chooses the tint used for background and surface colors.	Tap one: Tidewater teal, Forest green, Slate, Warm stone, Ocean, Earth, Plum, Neutral gray.	Default Tidewater teal.
Plain (less colorful) backgrounds `base.surface`	Makes surfaces plainer instead of tinted with your color.	Tick to turn on.	Default off (tinted).
Describe the look you want (box, inside “Describe it — AI theme”)	You type a short description, such as “modern, premium, clean and dark”. The AI picks only from approved colors, fonts and safe sizes. The result previews at once.	Write one or two sentences.	Card hidden if the site owner turned AI assistants off.
Create it (button)	Sends your description and applies the look it returns. If any color had to be adjusted for readability you are told how many.	Press after typing.	Check the result on devices before saving.
Use my brand color on proposals, invoices and other pages my customers see `customer_pages`	When on, your brand color carries over to customer-facing pages after you publish. Only the brand color carries over, adjusted to stay readable. Your internal layout never changes what customers see.	Tick the box (My business scope only).	Off by default.

Steps

1. Open **Settings → Business → Appearance & layout**.
2. Under **Change the look for**, tap **My business** (or **Just me**).
3. On the **Look** tab choose **Light, dark or high contrast**.
4. Try a tile under **Ready-made looks**. Use **Undo** if you do not like it.
5. Under **Your brand colors**, pick Brand / primary, Secondary and Main call to action, then the Background tint.
6. Optional: describe a look under **Describe it — AI theme** and press **Create it**.
7. Contractors: tick **Use my brand color on proposals, invoices and other pages my customers see** if you want it.
8. Press **Preview on devices** to see it on phone, tablet and computer widths.
9. Save: **Save my look** for Just me, or **Review & publish** for My business and Whole site. See the history and publishing article for details.

Tips

- A color that would be hard to read is nudged just enough and you are told. You can press **Auto** next to a color on the Colors tab to hand it back to VisionScaper.
- “Match my device” is a good choice when your crew uses phones with different settings.
- You do not have to save to try things. Leaving the screen without saving drops the preview.

If something goes wrong

- **A control is greyed out.** The site owner locked that group. The note says so.
- **Readability problems are shown.** You cannot publish until they are fixed. Press Reset on the colors involved or choose lighter or darker colors.
- **Create it shows an error.** The AI could not be reached. Try again or choose a ready-made look.

Settings → Appearance & layout: Colors tab (all 33 colors)

Every color swatch on the Colors tab with what it colors, plus the area color-coding switch.

Open **Settings → Business → Appearance & layout** and tap the **Colors** tab. It lists every individual color VisionScaper uses. Each one can be left on Auto or set by you. The three brand colors (Brand / primary, Secondary, Main call to action) are on the Look tab, not here.

Before you start

- Choose your scope first (**Change the look for**). See the Look tab article.
- If the site owner locked **Colors and branding**, the swatches are switched off and a note says “The site owner has locked these settings.”

How colors work

Colors set to Auto are worked out from your brand colors and the light/dark mode. Anything you set yourself is checked. If it would be hard to read, VisionScaper nudges it just enough and shows “Adjusted to … so … stay readable” under the color.

Fields

Color (exact label and key)	What it colors	What to enter	Default / notes
Page background `colors.bg`	Used for: Behind everything. Shown in the “Surfaces” card.	Tap the swatch and pick a color. Press **Auto** (appears once you set it) to go back to the automatic color.	Default Auto: worked out from your brand colors and the light/dark mode.
Sunken background `colors.bg2`	Used for: List rows, fields, chips. Shown in the “Surfaces” card.	Tap the swatch and pick a color. Press **Auto** (appears once you set it) to go back to the automatic color.	Default Auto: worked out from your brand colors and the light/dark mode.
Card background `colors.panel`	Used for: Cards, squares, Hub menu. Shown in the “Surfaces” card.	Tap the swatch and pick a color. Press **Auto** (appears once you set it) to go back to the automatic color.	Default Auto: worked out from your brand colors and the light/dark mode.
Raised card `colors.panel2`	Used for: Numbers (KPIs), highlighted cards. Shown in the “Surfaces” card.	Tap the swatch and pick a color. Press **Auto** (appears once you set it) to go back to the automatic color.	Default Auto: worked out from your brand colors and the light/dark mode.
Header background `colors.headerBg`	Used for: Top bar. Shown in the “Surfaces” card.	Tap the swatch and pick a color. Press **Auto** (appears once you set it) to go back to the automatic color.	Default Auto: worked out from your brand colors and the light/dark mode.
Navigation background `colors.navBg`	Used for: Hub menu buttons. Shown in the “Surfaces” card.	Tap the swatch and pick a color. Press **Auto** (appears once you set it) to go back to the automatic color.	Default Auto: worked out from your brand colors and the light/dark mode.
Window background `colors.modalBg`	Used for: Pop-up windows and sheets. Shown in the “Surfaces” card.	Tap the swatch and pick a color. Press **Auto** (appears once you set it) to go back to the automatic color.	Default Auto: worked out from your brand colors and the light/dark mode.
Field background `colors.inputBg`	Used for: Text boxes and drop-downs. Shown in the “Surfaces” card.	Tap the swatch and pick a color. Press **Auto** (appears once you set it) to go back to the automatic color.	Default Auto: worked out from your brand colors and the light/dark mode.
Divider `colors.line`	Used for: Thin dividers and field borders. Shown in the “Lines” card.	Tap the swatch and pick a color. Press **Auto** (appears once you set it) to go back to the automatic color.	Default Auto: worked out from your brand colors and the light/dark mode.
Border `colors.line2`	Used for: Card and button outlines. Shown in the “Lines” card.	Tap the swatch and pick a color. Press **Auto** (appears once you set it) to go back to the automatic color.	Default Auto: worked out from your brand colors and the light/dark mode.
Text `colors.text`	Used for: All body text. Shown in the “Text” card.	Tap the swatch and pick a color. Press **Auto** (appears once you set it) to go back to the automatic color.	Default Auto: worked out from your brand colors and the light/dark mode.
Headings `colors.heading`	Used for: Page and card titles. Shown in the “Text” card.	Tap the swatch and pick a color. Press **Auto** (appears once you set it) to go back to the automatic color.	Default Auto: worked out from your brand colors and the light/dark mode.
Secondary text `colors.muted`	Used for: Hints, captions, labels. Shown in the “Text” card.	Tap the swatch and pick a color. Press **Auto** (appears once you set it) to go back to the automatic color.	Default Auto: worked out from your brand colors and the light/dark mode.
Links `colors.link`	Used for: Text links. Shown in the “Text” card.	Tap the swatch and pick a color. Press **Auto** (appears once you set it) to go back to the automatic color.	Default Auto: worked out from your brand colors and the light/dark mode.
Focus ring `colors.focus`	Used for: Keyboard focus outline. Shown in the “States” card.	Tap the swatch and pick a color. Press **Auto** (appears once you set it) to go back to the automatic color.	Default Auto: worked out from your brand colors and the light/dark mode.
Success `colors.success`	Used for: Paid, done, sent. Shown in the “Status” card.	Tap the swatch and pick a color. Press **Auto** (appears once you set it) to go back to the automatic color.	Default Auto: worked out from your brand colors and the light/dark mode.

Color (exact label and key)	What it colors	What to enter	Default / notes
Error / danger `colors.danger`	Used for: Errors, late invoices, delete. Shown in the “Status” card.	Tap the swatch and pick a color. Press **Auto** (appears once you set it) to go back to the automatic color.	Default Auto: worked out from your brand colors and the light/dark mode.
Info `colors.info`	Used for: Viewed, informational chips. Shown in the “Status” card.	Tap the swatch and pick a color. Press **Auto** (appears once you set it) to go back to the automatic color.	Default Auto: worked out from your brand colors and the light/dark mode.
Overview `colors.cDash`	Used for: Overview square and menu button. Shown in the “Area colors” card.	Tap the swatch and pick a color. Press **Auto** (appears once you set it) to go back to the automatic color.	Default Auto: worked out from your brand colors and the light/dark mode.
Inbox / messages `colors.cInbox`	Used for: Inbox. Shown in the “Area colors” card.	Tap the swatch and pick a color. Press **Auto** (appears once you set it) to go back to the automatic color.	Default Auto: worked out from your brand colors and the light/dark mode.
Customers `colors.cCustomers`	Used for: Customers. Shown in the “Area colors” card.	Tap the swatch and pick a color. Press **Auto** (appears once you set it) to go back to the automatic color.	Default Auto: worked out from your brand colors and the light/dark mode.
Marketing `colors.cMarketing`	Used for: Marketing. Shown in the “Area colors” card.	Tap the swatch and pick a color. Press **Auto** (appears once you set it) to go back to the automatic color.	Default Auto: worked out from your brand colors and the light/dark mode.
Quotes, estimates & proposals `colors.cQuotes`	Used for: Quotes. Shown in the “Area colors” card.	Tap the swatch and pick a color. Press **Auto** (appears once you set it) to go back to the automatic color.	Default Auto: worked out from your brand colors and the light/dark mode.
Jobs `colors.cJobs`	Used for: Jobs. Shown in the “Area colors” card.	Tap the swatch and pick a color. Press **Auto** (appears once you set it) to go back to the automatic color.	Default Auto: worked out from your brand colors and the light/dark mode.
Calendar `colors.cCalendar`	Used for: Calendar. Shown in the “Area colors” card.	Tap the swatch and pick a color. Press **Auto** (appears once you set it) to go back to the automatic color.	Default Auto: worked out from your brand colors and the light/dark mode.
Landscape design & plans `colors.cDesign`	Used for: Landscape plans, Measure. Shown in the “Area colors” card.	Tap the swatch and pick a color. Press **Auto** (appears once you set it) to go back to the automatic color.	Default Auto: worked out from your brand colors and the light/dark mode.
Invoices & payments `colors.cInvoices`	Used for: Invoices. Shown in the “Area colors” card.	Tap the swatch and pick a color. Press **Auto** (appears once you set it) to go back to the automatic color.	Default Auto: worked out from your brand colors and the light/dark mode.
Equipment `colors.cEquipment`	Used for: Equipment. Shown in the “Area colors” card.	Tap the swatch and pick a color. Press **Auto** (appears once you set it) to go back to the automatic color.	Default Auto: worked out from your brand colors and the light/dark mode.
Crew & field work `colors.cCrew`	Used for: Door-to-door, Route planner. Shown in the “Area colors” card.	Tap the swatch and pick a color. Press **Auto** (appears once you set it) to go back to the automatic color.	Default Auto: worked out from your brand colors and the light/dark mode.
Chart color 1 `colors.chart1`	Used for: Bars and first series. Shown in the “Charts” card.	Tap the swatch and pick a color. Press **Auto** (appears once you set it) to go back to the automatic color.	Default Auto: worked out from your brand colors and the light/dark mode.
Chart color 2 `colors.chart2`	Used for: Second series. Shown in the “Charts” card.	Tap the swatch and pick a color. Press **Auto** (appears once you set it) to go back to the automatic color.	Default Auto: worked out from your brand colors and the light/dark mode.
Chart color 3 `colors.chart3`	Used for: Third series. Shown in the “Charts” card.	Tap the swatch and pick a color. Press **Auto** (appears once you set it) to go back to the automatic color.	Default Auto: worked out from your brand colors and the light/dark mode.
Chart color 4 `colors.chart4`	Used for: Fourth series. Shown in the “Charts” card.	Tap the swatch and pick a color. Press **Auto** (appears once you set it) to go back to the automatic color.	Default Auto: worked out from your brand colors and the light/dark mode.

Each of these 33 colors is shown in a group card. The groups are Surfaces (8 colors), Lines (2), Text (4), States (1), Status (3), Area colors (11) and Charts (4).

Extra control

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Color-code the squares and Hub menu by area `areas`	In the Area colors card. When ticked, each Hub area square and menu button uses its own color (Overview, Inbox, Customers and so on) so areas are easy to tell apart.	Tick to turn on.	Default off.

Steps

1. Open the **Colors** tab.
2. Find the card that matches what you want to change, for example **Surfaces** for backgrounds.
3. Tap the swatch next to the color name and pick a new color.
4. Look at the live preview. If you see “Adjusted to …”, VisionScaper changed it to keep text readable.
5. To undo a single color, press **Auto** next to it. To undo several, press **Undo** at the top.
6. In **Area colors**, tick **Color-code the squares and Hub menu by area** if you want a different color for each area.
7. Save or publish (see the history and publishing article).

Tips

- Change the brand colors first. Most colors follow them automatically and need no touch.
- Set the Text and Page background together so they have strong contrast.
- The four chart colors set the first four series in graphs and reports.

If something goes wrong

- **Swatches are greyed out.** Colors are locked by the site owner, or the site owner turned off personal colors (then only light/dark, text size, spacing and motion can be changed).
- **A color keeps changing after I pick it.** It failed the readability check and was adjusted. Choose a stronger contrast.
- **Red “readability problem” count.** Open Details, then reset the color listed.

Settings → Appearance & layout: Text and Shape & spacing tabs

Every control for font, text size, line height, corners, borders, shadow, spacing, icon size and animation speed.

Open **Settings → Business → Appearance & layout**, then the **Text** tab or the **Shape & spacing** tab. Text controls the font and how big and heavy words are. Shape & spacing controls corners, borders, shadows, spacing, icon size and animation speed. Every value is limited to a safe range so a screen cannot break.

Before you start

- Pick your scope under **Change the look for** (Just me, My business or Whole site).
- A group may be locked by the site owner (Fonts and text; Corners, borders and icons; Spacing; Motion). Locked groups show a lock note.

Fields: Text tab

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Font `type.font`	Chooses the typeface used across the app. Only fonts that stay readable at every size are offered. Atkinson Hyperlegible was designed for people with low vision.	Tap one: Rounded (default), System, Inter (clean), Nunito (friendly), Lato (classic), Atkinson Hyperlegible (easiest to read), Source Serif (premium).	Default Rounded. Web fonts load only when chosen.
Text size `type.size`	Makes all text, buttons and labels grow or shrink together.	Drag the slider. Range 90% to 130%, steps of 5%.	Default 100%.
Line height `type.lh`	Space between lines of text.	Drag the slider. Range 1.30 to 1.65, steps of 0.05.	Default 1.45.
Letter spacing `type.ls`	Space between letters, in em.	Drag the slider. Range -0.010 to +0.040 em, steps of 0.005.	Default 0.
Heading weight `type.hw`	How bold headings are.	Drag the slider. Range 600 to 900, steps of 100.	Default 800.
Button text weight `type.btnw`	How bold button words are.	Drag the slider. Range 600 to 800, steps of 100.	Default 700.
Preview (card)	A sample heading, paragraph and “Send quote” button that shows the result.	Look at it after each change.	Display only.

Fields: Shape & spacing tab

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Buttons `shape.btn`	Corner style of all buttons.	Tap one: Pill, Rounded, Square.	Default Pill (fully rounded).
Card corners `shape.card`	How round card corners are.	Slider 0% to 160%, steps of 10%.	Default 100%.
Field corners `shape.input`	How round text boxes and drop-downs are.	Slider 0% to 160%, steps of 10%.	Default 100%.
Other corners `shape.rad`	Corner rounding of everything else.	Slider 0% to 160%, steps of 10%.	Default 100%.
Border thickness `shape.bw`	Thickness of outlines in pixels.	Slider 1 px to 2 px, steps of 0.5 px.	Default 1 px.
Shadow / elevation `shape.shadow`	How strong shadows under cards are.	Tap one: None, Soft, Medium, Strong.	Default Medium.
Spacing & density `density`	Space between and inside cards. Buttons and fields never get smaller than a finger.	Tap one: Compact, Comfortable, Spacious.	Default Comfortable. Locked if the site owner locked Spacing.
Icon size `icons`	Size of icons on squares and menus.	Slider 85% to 130%, steps of 5%.	Default 100%.
Motion: Animation speed `motion`	Speed of animations. Devices set to “reduce motion” always get calm animations.	Tap one: Normal, Faster, Slower, Off.	Default Normal. Locked if the site owner locked Motion.

Steps

1. Open the **Text** tab. Choose a **Font**.
2. Move **Text size** up if people find the app small. Check the **Preview** card.
3. Adjust **Line height**, **Letter spacing**, **Heading weight** and **Button text weight** only if you need to.
4. Open **Shape & spacing**. Pick **Buttons** corner style and set the three corner sliders and **Border thickness**.
5. Choose a **Shadow / elevation** level and a **Spacing & density** setting.
6. Set **Icon size** and **Motion**.

7. Use **Preview on devices** to check phone and tablet widths, then save or publish.

Tips

- For a crew that works in sun, try Large text (a ready-made look on the Look tab) or Atkinson Hyperlegible with text size 115%.
- Compact spacing fits more on a phone screen; Spacious is easier to tap with gloves.
- A slider drag shows the value next to it. The change is applied when you let go.

If something goes wrong

- **Slider will not go further.** Values outside the range are limited to the nearest safe value on purpose.
- **Controls greyed out.** The site owner locked that group.
- **My font looks the same.** Web fonts load when chosen. Wait a moment and check again.

Settings → Appearance & layout: Layout tab

Every control on the Layout tab: eight arrange sheets, pin, hide, phone order, assistant, recommendation and eight presets.

Open **Settings → Business → Appearance & layout**, then the **Layout** tab. This tab decides what appears on each screen, in what order, and what is hidden or pinned. You can drag items yourself, ask the layout assistant in plain words, take a recommendation, or use a ready-made preset. A **Required** item (Settings, Plan, Help, Account) can be moved but never hidden.

Before you start

- Choose your scope at the top. Just me changes only your screens. Whole site (site owner) sets the default for each role.
- If the site owner locked **Layout**, a note says so and the changes are blocked.

Fields

What goes where

One button per area opens the arrange sheet described below. Each button shows how many items are hidden or pinned, or “Default order”.

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Contractor home — sections	Order and visibility of the blocks on the contractor home screen: Today’s numbers, Marketing needs you, Quick actions, Today’s schedule, Squares (always shown), Design studio.	Tap the button to open the sheet.	Where it shows: Contractor home screen.
Contractor home — squares	Order and visibility of the area squares (Overview, Customers, Inbox, Quotes, Jobs, Services, Calendar, Field work, Route planner, Door-to-door, Equipment, Landscape plans, Measure, Invoices, Marketing, AI Receptionist, Training, Settings, Current plan, Help).	Tap the button.	Settings, Current plan and Help are always shown.
Quick actions	The shortcut buttons on the home screen: New quote, Add customer, Schedule a visit, New invoice, New campaign, Ask the marketing AI, New design, Measure a property, Plan today’s route.	Tap the button.	The first four are shown by default; the others start hidden.
Contractor Hub menu	Order and visibility of the menu at the top of every Hub page (same areas as the squares).	Tap the button.	Settings, Current plan and Help are always shown.
Hub Overview — sections	Blocks on the Overview page: Needs you (always shown), Today’s jobs, This week, Get set up, Marketing, Quick buttons, Recent activity, Reviews.	Tap the button.	—
Home screen — squares	Squares on the homeowner home screen: Identify Plant, Asset Library, My designs, VisionScaper Browser, Add My Own Item. This is the only region a homeowner has.	Tap the button.	—
Marketing — tabs	Tabs inside Hub → Marketing: Today, AI assistant, Approvals, Campaigns, Automations, Reviews, Reminders, Conversations, Results, Consent, Safety, Settings (always shown).	Tap the button.	—
Customer page — tabs	Tabs on a customer’s page: Overview (always shown), Work, Money, Notes.	Tap the button.	—

The arrange sheet (opens from each button)

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Drag handle (⠿), Move up (↑), Move down (↓)	Reorders items. Drag with mouse, finger or pen. Keyboard: hold Alt and use the arrow keys.	Drag an item, or tap the arrows.	Screen readers are told the new position.
Pin to the front (📌)	Keeps an item at the front of the list. Pinned items are marked “pinned”.	Tap the pin on an item; tap again to unpin.	Not offered on Quick actions or on the sections lists.
Show / Hide (👁 eye)	Hides an item or brings it back.	Tap the eye.	Switched off for items marked “always shown”.
Use a different order on phones	Gives phones their own order. Then two buttons appear: Computer & tablet and Phone.	Tick the box, then choose which order you are editing.	Off by default.
Or tell me: “put quotes first”… (box) + ✨ Do it	Changes this one list from a plain sentence, e.g. “hide door-to-door”.	Type, press Do it or Enter, check the list, then Save.	Uses the layout assistant.
💡 Suggest an order	Reorders by what you use most and what needs you today. Clears pins.	Press it, check, then Save.	—
Square style	How squares look: Squares, Compact or List.	Tap one. Shown for squares only.	Phones always show 2 per row (1 in List).
Squares per row on a computer	Number of squares per row.	Tap Auto, 3, 4, 5 or 6.	Shown for squares only.
The Hub menu uses this same order	Keeps the Hub menu in the same order as the squares.	Tick or untick (contractor squares only).	On unless you untick it.
Save and Reset to default	Save stores the sheet. Reset to default clears your order, hidden and pinned items for this area.	Press Save to keep changes.	Whole site scope shows the Save label as “Save as the contractor default” or “Save as the homeowner default”.

Layout assistant, recommendation and presets

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Tell the layout assistant what to change (box)	Lets you describe a whole-screen layout change in plain words, e.g. “Put the schedule first”, “move customers above marketing”, “hide door-to-door”.	Type a sentence; press Rearrange or Enter.	Previews on your screens first.
✨ Rearrange (button)	Runs the assistant on your sentence.	Press it, then choose Keep it or Undo.	Keep it saves the layout.
💡 Recommended layout (button)	Suggests an order for your squares from what you use and what is waiting for you (marketing, inbox, quotes, invoices, schedule).	Press it, then Accept, Adjust it or No thanks.	Accept saves.
Layout preset: Contractor (default)	Standard order for everything.	Press the tile, then Use this layout or Cancel.	—
Layout preset: Office manager	Inbox, customers, quotes, invoices first; hides door-to-door, measure, routes, equipment.	As above.	—
Layout preset: Sales-focused	Quotes, inbox, customers and marketing up front; hides equipment and routes.	As above.	—
Layout preset: Operations-focused	Schedule, jobs, routes and equipment first; hides marketing and door-to-door.	As above.	—
Layout preset: Finance-focused	Invoices, Overview, quotes and jobs first; hides door-to-door, measure, routes and plans.	As above.	—
Layout preset: Marketing-focused	Marketing, customers, inbox and quotes first.	As above.	—
Layout preset: Field worker	Schedule, routes, measure, jobs, equipment and customers; List style.	As above.	—
Layout preset: Mobile-first	Quick actions first, compact style for one-hand use.	As above.	—

Whole site only

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Default layout for each role	Choose which role you are setting: Contractors or Homeowners. New and existing people start from this layout; anyone allowed to can still rearrange their own.	Tap Contractors or Homeowners.	Site owner only.
Use my own layout as the default	Copies your own layout as the default for that role.	Press it.	Site owner only.
Clear the default	Goes back to the built-in order for that role.	Press it.	Site owner only.

Steps

1. Open the **Layout** tab. Presets are the fastest way to start: press a tile and read “Previewing …”.
2. Press **Use this layout** to keep it, or **Cancel**.
3. To fine tune, press the button for one area, for example **Contractor home — squares**.
4. Drag or use the arrows to reorder, tap 📌 to pin and 👁️ to hide.
5. Tick **Use a different order on phones** if phones need their own order.
6. Press **Save**. A “Layout saved.” message confirms it.
7. Optional: type a request in **Tell the layout assistant** and press **Rearrange**.

Tips

- Hiding something here only changes what is shown. It does not delete any data.
- Use **Reset to default** on one area if you get lost.
- Every layout change is kept in History so you can restore an earlier layout.

If something goes wrong

- **The eye button is dim.** The item is required and always shown.
- **Assistant says it cannot do that.** It only reorders and shows or hides approved items. Use the sheet.
- **Layout not saved.** Press Save in the sheet; the sheet shows a message if saving failed.

Settings → Appearance & layout: save, publish, history and site controls

Preview on devices, save draft, publish with report, history, saved themes and the site owner locks and permissions.

This article covers the bottom bar of **Settings → Business → Appearance & layout**, the review and publish window, **Preview on devices**, the **History** tab and the **Site controls** tab. These decide how your look is saved, checked, published and rolled back.

Before you start

- Which button you see depends on the scope under **Change the look for**. Just me has **Save my look**. My business and Whole site have **Save draft** and **Review & publish**.
- **Site controls** appears only for the site owner on the **Whole site** scope.

Fields

Bottom action bar

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
📱 Preview on devices	Opens the real app inside a frame, with your unsaved look, at a chosen device size. Nothing is saved from this window.	Press it. Choose a Device (Phone 390, Tablet 768, Laptop 1280, Desktop 1440, Large 1920) and a Screen (Home; contractors also Overview, Marketing, Customers, Calendar, Invoices, Settings).	Contains 📐 Check all widths on this screen.
💾 Save my look (Just me)	Opens the Check & save window; the Save my look button inside saves your personal look on every device.	Press, read the report, press Save my look.	Shows "💾 Saved" when nothing has changed. Blocked while readability problems exist.
📝 Save draft (My business, Whole site)	Stores your work as a draft. Only you see it until you publish.	Press it.	Message "Draft saved — only you see it until you publish."
🚀 Review & publish (My business, Whole site)	Opens "Preview & validation report" with What changed, readability checks and a screen-size check, then a Publish button.	Press it, read, then Publish.	A known-good copy is kept automatically so you can roll back.
Reset to inherited look (Reset to VisionScaper default on Whole site)	Throws away your changes and returns to the look you inherit.	Press it. Use Undo if you pressed by mistake.	—

Review and publish window

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
What changed	Lists the groups you changed (Brand colors, Colors, Text, Shape, Spacing, Motion, Icons, Light / dark, Area colors, Name) and what each affects.	Read it.	Display only.
Readability (contrast) list	Each color pair with its contrast ratio and the ratio needed. A cross means it fails.	Open Details on the status line or read here.	Blocking failures disable Publish or Save.
Adjusted automatically	Lists colors VisionScaper changed to keep text readable (from → to).	Read it.	Display only.
📐 Check every screen size (button)	Opens your real screens at 9 widths (320 to 1920 px) and compares them with the default look.	Press and wait. Each width shows a tick or a cross.	Publishing is blocked if this finds a new problem.
Publish / Save my look (button in the report)	Publishes (business and site) or saves (personal) your look.	Press once.	Toast: "Published. The previous version is in History." or "Saved — this is your look on every device."

History tab: Just me

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Your earlier looks & layouts: Restore	Each time you save, the previous look is kept. Restore brings one back.	Press Restore on the row.	Message "Restored."
Go back to the default look & layout	Clears your personal theme and layout.	Press it.	Message "Back to the default look and layout."

History tab: My business and Whole site

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
🛟 Roll back to the last known-good version	Publishes the last version that passed checks.	Press it.	Disabled until a known-good version exists.
⏏️ Unpublish (use the default)	Removes the published look so the default look returns.	Press it.	Disabled if nothing is published.
Published versions: Preview	Previews that older version in the editor (not live).	Press Preview.	Publish to bring it back.
Published versions: Restore	Makes that older version live.	Press Restore.	The last 20 published versions are kept.
Theme name (box)	Name for a saved theme copy. If left empty it is called “[name] copy”.	Type e.g. Fall look.	—
⧉ Save as new theme	Saves the current look as a named theme without publishing.	Press it.	Up to 10 saved themes.
Saved themes: Load	Loads the saved theme into the editor.	Press Load, then publish.	—
Saved themes: Delete	Removes a saved theme.	Press Delete.	Cannot be undone.

Site controls tab (site owner, Whole site)

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Colors and branding `locks.colors`	Locks colors so businesses and people cannot change them.	Tick to lock.	Off by default.
Fonts and text `locks.type`	Locks the Text tab.	Tick to lock.	Off by default.
Corners, borders and icons `locks.shape`	Locks shape settings.	Tick to lock.	Off by default.
Spacing `locks.density`	Locks spacing.	Tick to lock.	Off by default.
Motion `locks.motion`	Locks animation speed.	Tick to lock.	Off by default.
Light / dark mode `locks.mode`	Locks the light/dark choice.	Tick to lock.	Off by default.
Layout (order of squares, menus and sections) `locks.layout`	Locks layout changes.	Tick to lock.	Off by default.
Contractors can brand their own business `allow.business_theme`	Lets contractors use the My business scope.	Tick to allow.	—
Everyone can choose their own colors `allow.user_theme`	If unticked, people can only change light/dark, text size, spacing and motion.	Tick to allow.	—
Everyone can rearrange their own screens `allow.user_layout`	Lets people rearrange their own screens.	Tick to allow.	—
AI theme and layout assistants `allow.ai`	Turns the AI theme and layout assistants on or off for everyone.	Tick to allow.	—
Save site controls (button)	Stores the locks and permissions.	Press once.	Message “Site controls saved.”

(Default ticks for the site controls are not set in the screen code; the saved values are shown when you open the tab.)

Steps

1. When you are happy with your look, press **Preview on devices** and check Phone and Computer.
2. Press **Review & publish** (or **Save my look**).
3. Read **What changed** and the readability list.
4. Press **Check every screen size** and wait for the ticks.
5. Press **Publish**.
6. Later, open the **History** tab to restore, preview or roll back.
7. Site owner: open **Site controls**, tick locks and permissions, press **Save site controls**.

Tips

- Use **Save as new theme** to keep a seasonal look ready without publishing it.
- A draft is private to you. Customers and crew see nothing until you publish.
- If something looks wrong live, use **Roll back to the last known-good version** first, then investigate.

If something goes wrong

- **Publish is greyed out.** A readability failure or a new screen-size problem is blocking it. Fix the colors listed.
- **Preview on devices stays on “Loading”.** The frame waits up to about 20 seconds; try again.
- **Restore is missing.** Only the owner of that scope sees Publish, Restore and Roll back.

Settings → Social & gallery: links and work gallery

Every box on the Social & gallery tab: eight social links with Show and Test, the live preview and the 60-photo work gallery.

Open the Contractor Hub, choose **Settings**, pick the **Business** group and the **Social & gallery** tab. This tab holds your eight social and review links, a live preview of how they look to homeowners, and a Work gallery of your best photos. Only approved contractor accounts use it.

Before you start

- The full web addresses (or @names) of the pages you already have.
- Photos of finished work, if you want a gallery. The gallery depends on your plan (which plan includes it is a placeholder assignment, not approved). Without it, the Work gallery card shows a locked note instead of the Add button.

Fields

Social links card

Every network has the same three controls: a link box, a Show tick box and a Test button. Links are shown in this order. Where space is tight (the Find a Contractor card) the first three switched-on links are shown. Your page, proposals and invoices show all of them. Every plan includes every network.

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Google Business Profile link `google`	Where the Google Business Profile button sends homeowners: where homeowners check reviews and maps. The screen suggests starting here if it is empty.. Links open in a new tab and carry no trackers.	Full link only. Paste a link that points to the real Google Business Profile site; links to other sites are refused.	Empty by default.
Google Business Profile: Show (tick box)	Switches the Google Business Profile link on or off everywhere at once. Off keeps the link saved but hidden.	Tick to show, untick to hide.	On by default for each network.
Google Business Profile: Test (button)	Opens the saved Google Business Profile link in a new tab, exactly as homeowners will get it.	Save first, then press Test. If the box is empty it says “Add the link first.”	Needs a full https link; a handle shows “Save first — then Test opens the exact link homeowners will get.”
Facebook link `facebook`	Where the Facebook button sends homeowners: your Facebook page. Links open in a new tab and carry no trackers.	@name or full link. Paste a link that points to the real Facebook site; links to other sites are refused.	Empty by default.
Facebook: Show (tick box)	Switches the Facebook link on or off everywhere at once. Off keeps the link saved but hidden.	Tick to show, untick to hide.	On by default for each network.
Facebook: Test (button)	Opens the saved Facebook link in a new tab, exactly as homeowners will get it.	Save first, then press Test. If the box is empty it says “Add the link first.”	Needs a full https link; a handle shows “Save first — then Test opens the exact link homeowners will get.”
Instagram link `instagram`	Where the Instagram button sends homeowners: your Instagram profile. Links open in a new tab and carry no trackers.	@name or full link. Paste a link that points to the real Instagram site; links to other sites are refused.	Empty by default.
Instagram: Show (tick box)	Switches the Instagram link on or off everywhere at once. Off keeps the link saved but hidden.	Tick to show, untick to hide.	On by default for each network.
Instagram: Test (button)	Opens the saved Instagram link in a new tab, exactly as homeowners will get it.	Save first, then press Test. If the box is empty it says “Add the link first.”	Needs a full https link; a handle shows “Save first — then Test opens the exact link homeowners will get.”
Houzz link `houzz`	Where the Houzz button sends homeowners: your Houzz pro page. Links open in a new tab and carry no trackers.	@name or full link. Paste a link that points to the real Houzz site; links to other sites are refused.	Empty by default.
Houzz: Show (tick box)	Switches the Houzz link on or off everywhere at once. Off keeps the link saved but hidden.	Tick to show, untick to hide.	On by default for each network.
Houzz: Test (button)	Opens the saved Houzz link in a new tab, exactly as homeowners will get it.	Save first, then press Test. If the box is empty it says “Add the link first.”	Needs a full https link; a handle shows “Save first — then Test opens the exact link homeowners will get.”
YouTube link `youtube`	Where the YouTube button sends homeowners: your YouTube channel. Links open in a new tab and carry no trackers.	@name or full link. Paste a link that points to the real YouTube site; links to other sites are refused.	Empty by default.
YouTube: Show (tick box)	Switches the YouTube link on or off everywhere at once. Off keeps the link saved but hidden.	Tick to show, untick to hide.	On by default for each network.
YouTube: Test (button)	Opens the saved YouTube link in a new tab, exactly as homeowners will get it.	Save first, then press Test. If the box is empty it says “Add the link first.”	Needs a full https link; a handle shows “Save first — then Test opens the exact link homeowners will get.”

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Nextdoor link `nextdoor`	Where the Nextdoor button sends homeowners: your Nextdoor business page. Links open in a new tab and carry no trackers.	Full link only. Paste a link that points to the real Nextdoor site; links to other sites are refused.	Empty by default.
Nextdoor: Show (tick box)	Switches the Nextdoor link on or off everywhere at once. Off keeps the link saved but hidden.	Tick to show, untick to hide.	On by default for each network.
Nextdoor: Test (button)	Opens the saved Nextdoor link in a new tab, exactly as homeowners will get it.	Save first, then press Test. If the box is empty it says “Add the link first.”	Needs a full https link; a handle shows “Save first — then Test opens the exact link homeowners will get.”
TikTok link `tiktok`	Where the TikTok button sends homeowners: your TikTok profile. Links open in a new tab and carry no trackers.	@name or full link. Paste a link that points to the real TikTok site; links to other sites are refused.	Empty by default.
TikTok: Show (tick box)	Switches the TikTok link on or off everywhere at once. Off keeps the link saved but hidden.	Tick to show, untick to hide.	On by default for each network.
TikTok: Test (button)	Opens the saved TikTok link in a new tab, exactly as homeowners will get it.	Save first, then press Test. If the box is empty it says “Add the link first.”	Needs a full https link; a handle shows “Save first — then Test opens the exact link homeowners will get.”
LinkedIn link `linkedin`	Where the LinkedIn button sends homeowners: your LinkedIn page. Links open in a new tab and carry no trackers.	Full link only. Paste a link that points to the real LinkedIn site; links to other sites are refused.	Empty by default.
LinkedIn: Show (tick box)	Switches the LinkedIn link on or off everywhere at once. Off keeps the link saved but hidden.	Tick to show, untick to hide.	On by default for each network.
LinkedIn: Test (button)	Opens the saved LinkedIn link in a new tab, exactly as homeowners will get it.	Save first, then press Test. If the box is empty it says “Add the link first.”	Needs a full https link; a handle shows “Save first — then Test opens the exact link homeowners will get.”
Save social links (button)	Checks every link, saves them, and tells you how many are switched on.	Press once after editing.	Message “Saved — N links are on your pages now.” If none is switched on: “Saved. No links are switched on, so none are shown.” A wrong link shows a red message under that box.
How homeowners will see them (preview)	A live row of badges for the links that are both ticked and filled in.	Look at it as you edit.	Says “Nothing switched on yet — homeowners won’t see any links.” when empty.

Work gallery card

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Add a photo (button)	Adds one photo from your device to your gallery. Photos are shrunk to 1800 pixels on the longest side and saved as JPEG.	Press it, pick a picture. Repeat for more.	Up to 60 photos. At 60 it says “Your gallery holds 60 photos. Remove one to add another.” If your plan does not include the gallery you see a prompt to upgrade.
Remove photo (× on each photo)	Deletes that photo from the gallery.	Press the small × at the photo corner.	Immediate.

Steps

1. Open **Settings → Business → Social & gallery**.
2. In **Google Business Profile**, paste the full link to your profile.
3. For Facebook, Instagram, Houzz, YouTube and TikTok you may type your @name; for Nextdoor and LinkedIn paste the full link.
4. Leave **Show** ticked for the links you want visible. Untick the rest.
5. Press **Save social links**. Fix any red message and save again.
6. Press **Test** next to a link to confirm it opens the right page.
7. In **Work gallery**, press **Add a photo** and choose your best finished jobs.

Tips

- Put your best three networks first by filling them in; the first three switched on appear on your Find a Contractor card.
- Unticking **Show** is better than deleting a link if you may want it back.
- Photos should show finished work, not before photos of customers’ faces or house numbers.

If something goes wrong

- **A red message appears under a link.** The address does not match that network. Copy the address from your browser bar on that network’s page.
- **Test says to save first.** The box holds an @name, not a full link. Save, then test.
- **No Add a photo button.** Your plan does not include the gallery. The card says so.
- **Too many photos.** Remove one, then add again.

Settings → Services: templates list, versions and job profit

The Services tab button, the Services screen, archive and default actions, version history with compare and restore, and the Job profit report.

In the Contractor Hub, **Settings → Business → Services** shows a short card named **Service templates** with one button, 🧩 **Open Services**. That button takes you to the **Services** area (it is also a square and a menu item in the Hub). Services holds your reusable service templates: defaults for price, duration, crew, scope, materials, checklist, messages and automations, with version history and job profit.

What you can do depends on your team permissions. The owner can do everything. Other roles may be allowed to use templates but not change them (the screen then says “Your role can use these templates on jobs. Only the owner (or a manager, if allowed) can change them.”). The cost fields and the Job profit tab need the cost permission.

Before you start

- A rough idea of your services and prices. Starter services come with scope and checklists but no prices: you add those.
- To fill in costs, your Costs & markups settings (see the costs article) should be set.

Fields

Settings → Services tab

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Service templates card text	Explains that reusable services live in their own area.	Read it.	Display only.
🧩 Open Services (button)	Opens the Services area.	Press it.	Same as the Services square.

Services screen

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
➕ New service (button at the top)	Opens the template editor to create a template. See the template editor article for every field.	Press it.	Only shown if you may edit templates.
Tabs: 🧩 Templates, 🗄️ Archived, 📈 Job profit	Switch between live templates, archived templates and the profit report.	Tap a tab.	Job profit shows only with the cost permission. The profit tab is named with the Hub word for it, “Job profit”.
Search services (search box)	Filters the list by words in the name or category.	Type part of a name.	—
Add starter services (button, shown when the list is empty)	Adds a set of starter services with scope and checklists but no prices.	Press it, then add your prices to each.	Message says how many were added.
Tap a template row	Opens the editor on that template. Roles without edit permission see its version history instead.	Tap the name.	Each row shows price, hours, crew, billing, season and “used N×”, plus a version number such as v3.
🕘 Version history (icon on each row)	Opens the version history window.	Tap it.	See below.
⭐ / ☆ Default for category (icon on each row)	Makes the template the default for its category, so it is preselected when someone adds a service in that category. Tap again to clear.	Tap the star.	Needs the permission to set defaults.
⧉ Duplicate (icon on each row)	Opens the editor with a copy named “name (copy)”. Nothing is saved until you press Save template.	Tap it.	—
🗄️ Archive or delete, ♻️ Restore (icon on each row)	Archive hides a template from pickers. If a template was never used you are asked if you want to delete it for good (Cancel archives it instead). On the Archived tab the icon restores it.	Tap it. An undo notice appears after archiving.	Existing quotes and jobs are unaffected.

Version history window

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Compare checkbox on each version	Tick exactly two versions to compare them.	Tick two.	The compare button stays off until exactly two are ticked.
View (button)	Shows the full contents of that version in a list.	Press View.	The current version is marked “current”.
Restore (button)	Brings an older version back as a new version. History is kept. You are asked to confirm.	Press Restore, then OK.	Not shown for the current version or without edit permission.
Compare the two ticked (button)	Shows a table of fields that differ between the two versions.	Press it.	Says “no differences” when identical.

Job profit tab

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
From	Start date of the report.	Pick a date.	Default 1 January this year.
To	End date.	Pick a date.	Default today.
Category	Limits the report to one category.	Pick All categories or one category.	Default All categories.
Show (button)	Loads the report: jobs, revenue, estimated and actual cost, estimated and actual hours, estimated and actual margin per service.	Press it.	Actual figures count only jobs where actuals were recorded.

Steps

1. Open **Settings → Business → Services** and press 🧩 **Open Services** (or tap the **Services** square).
2. If the list is empty, press **Add starter services** or **New service**.
3. Fill in the template (see the template editor article) and press **Save template**.
4. Use the ⭐ star to make your favourite the default for its category.
5. After changing a template, open 🕘 to see the new version number. Old quotes and invoices keep the version they used.
6. Use the **Job profit** tab to see which services make money.

Tips

- Every save of a template is a new version, so a template change never alters an existing estimate, proposal, contract, invoice or finished job.
- Archive rather than delete: you can bring it back.
- Duplicate a template to make a seasonal variation.

If something goes wrong

- **No New service button.** Your role cannot edit templates. Ask the owner.
- **No Job profit tab.** It needs the cost permission.
- **Job profit says no finished work.** Add services to visits, quotes and invoices, then record actuals when jobs are done.

Service template editor: every field

Every input in the service template form: pricing, labor, materials, scheduling, messages, checklist, automations and version note.

This is the form behind **New service**, **Duplicate** and every template row in the Services area (reach it from **Settings → Business → Services → Open Services**). The top part is all you need. Everything below the line "That's all you need. Everything below is optional" sits in collapsible sections. Your role decides what you see: fields marked "cost permission" are hidden from people without it.

Before you start

- Open Services and press **New service**, or tap an existing template.
- Know the unit you sell by (per visit, per square foot and so on) and, if you wish to see margin, your labor and material costs.

Fields: main form

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Service name *	The name shown in pickers, quotes and visits.	e.g. Weekly lawn mowing. At least 2 characters.	Required. Up to 160 characters.
Category	Groups templates; used for defaults and the profit report.	Type or pick a suggestion: Lawn care, Cleanups, Beds & mulch, Planting, Pruning, Lawn renovation, Hardscape & grading, Design, or your own.	Up to 80 characters.
Pricing method	How the price is worked out. Flat rate: one price. Hourly: price × labor hours. Per unit: price × job quantity. Tiered by size: price by size band. Time & materials: hourly labor price plus materials with markup.	Pick from the drop-down.	Default Flat rate.
Default price ($) (label changes: Price per labor hour ($) / Price per [unit] ($) / Labor price per hour ($))	The price used when the template is added to a job. Hidden for Tiered by size.	A number. Leave blank to price each job when you add it.	Blank by default.
Unit	The unit for per-unit and tiered pricing. Also decides if a measured property can fill the quantity (sq ft, linear ft, cu yd, acre).	Pick or type: sq ft, linear ft, cu yd, each, visit, hour, acre, ton.	Shown only for Per unit and Tiered by size. Up to 20 characters.
Size tiers: "Up to … [unit] → price"	Each row is a size band and its price. The first band the job fits in sets the price.	Fill Up to and Price; press × to remove; **+ Add a size tier** adds a row.	Shown only for Tiered by size.
Estimated duration (hours)	Time on site for one job. Used for the labor estimate and scheduling.	Steps of 0.25, minimum 0.25.	Default 1.
Crew size	People on the job. Labor hours default to duration × crew.	Whole number, 1 or more.	Default 1.

When cost permission applies, a small box shows estimated cost, price, margin and labor hours as you type.

Fields: 📝 Description, scope & what's included

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Description	Short summary of the service.	A sentence or two.	Optional.
Scope of work	The list of tasks in the work. Becomes the scope lines in quotes.	One task per line.	Optional.
Included tasks	Things included. Shown as "Included: …" on quotes.	One per line.	Optional.
Excluded tasks	Things not included. Shown as "Not included".	One per line.	Optional.

Fields: 💲 Pricing & billing

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Minimum charge ($) `pricing.min`	Smallest price for this service. If the computed price is lower, the minimum is used and noted.	A dollar amount.	Optional.
Billing frequency	How it is billed and whether visits repeat.	One-time, Per visit, Weekly, Every 2 weeks, Monthly or Seasonal contract.	Default One-time.
Typical job quantity	The quantity used for the price/cost preview.	A number.	Default 1.
Markup % (when no default price) — cost permission	If there is no default price, the suggested price is cost plus this markup.	e.g. 40. Leave blank to use your price book.	Placeholder text reads "Use my price book".
Target profit margin % — cost permission	Shows a warning when the estimate falls below this margin.	0 to 95, e.g. 40 (example only).	Blank by default.
Alert managers when cost passes this % of budget — cost permission	Jobs from this template start with this alert level; you can change it per job.	10 to 300, e.g. 90.	Blank by default.

Fields: 👷 Labor

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Labor cost per hour ($) — cost permission	Your cost per hour for this service, overriding the company rate in Costs & markups.	A dollar figure. Blank uses your company labor rate.	Placeholder shows “My rate (…/hr)”.
Estimated labor hours (total)	Total labor hours for one job. Overrides duration × crew.	A number; blank uses duration × crew.	Optional.
Labor hours per unit	Hours per unit of quantity for per-unit and tiered services.	e.g. 0.01 (example).	Shown only for Per unit and Tiered by size.

Fields: 🧱 Materials, equipment & suppliers

Materials are repeatable rows. Press **+ Add material** to add a row and × to remove it. Rows with an empty name are dropped when saving.

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Material (name)	Name of the material line.	e.g. Mulch.	Required for a row to be kept.
Quantity	How many units are used.	A number.	Default 1.
Unit (small box)	Unit label for the material.	e.g. yd.	Optional.
Basis (drop-down)	per job: the quantity is used once. per … job units: the quantity scales with the job quantity.	Pick one.	Default per job.
Per how many job units	Appears with the second basis, e.g. per 100 sq ft.	A number.	Default 1.
Cost per unit ($/unit) — cost permission	Your cost for each unit of the material.	A dollar figure.	Blank means the section is flagged as needing a price.
Supplier — cost permission	Which supplier you buy it from.	Free text.	Optional.
Equipment (chips + **+ Other**)	Pick equipment from your Equipment area, or press **+ Other** and type a name.	Tap chips to toggle.	Optional.
Supplier preferences — cost permission	Notes on where to buy.	e.g. Mulch: Acme Landscape Supply, then Green Yard.	Optional.

Fields: 📅 Scheduling & season

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Preferred days	Days of the week you prefer to do this service.	Tap Sun to Sat chips.	None selected means any day.
Window from / to	Preferred time window.	Pick start and end times.	Optional.
Book at least (days ahead)	Minimum notice.	Whole number of days.	Default 0.
Weather-dependent (don’t schedule in rain)	Marks the service as weather-dependent.	Tick if true.	Off by default.
Months offered (none = all year)	The months the service is offered. A date outside the season shows a warning when you book; repeat visits outside the season are skipped.	Tap Jan to Dec chips.	None selected = all year.

Fields: ✉️ Customer messages

Three message types, each with its own tick box. Ticking it reveals the three boxes below. When ticked, they replace your standard wording for this service.

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Booking confirmation (tick) + Email subject, Email, Text message	Replaces your standard “appointment booked” message for this service.	Write subject, email body and text. Tags like {customer_first_name}, {appointment_date}, {appointment_time}, {property_address}, {company_name} fill in automatically.	Off by default.
Reminder before the visit (tick) + Email subject, Email, Text message	Replaces your standard reminder wording; your reminder timing stays the same.	Same tags.	Off by default.
When the job is done (tick) + Email subject, Email, Text message	Sent when the visit is marked Done.	Same tags.	Off by default.

Fields: 📋 Crew instructions & completion checklist, ⚡ Automations, save

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Employee instructions	Printed on the crew sheet. Never includes prices or costs.	Access notes, safety, how you want it done.	Optional.
Completion checklist	The crew ticks these off from the crew-sheet link on their phone.	One item per line, e.g. Take an after photo.	Optional.

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Create a draft invoice	When a visit is marked Done, a draft invoice is created (one-time and per-visit billing).	Tick to turn on.	Off by default.
Ask the customer for a review	Asks for a review when the visit is Done.	Tick to turn on.	Off by default.
Book the next visit	Books the next visit after Done for weekly, every-2-weeks and monthly billing; stays in season.	Tick to turn on.	Off by default.
Book a follow-up visit after (days)	Books a follow-up visit this many days after Done.	Whole number; 0 = none.	Default none.
Default template for this category	Preselects this template when someone adds a service in the category.	Tick to set. Needs the default permission.	Off by default.
Change note	A short note saved with the new version. Only when editing an existing template.	e.g. Raised mowing price.	Optional. Up to 200 characters.
Save template / Save as new version (button)	Saves. A new template is saved at version 1. Editing creates the next version and old jobs keep their version.	Press once.	If nothing changed it says “No changes to save.”

Steps

1. Open Services and press **New service**.
2. Type the **Service name** and **Category**.
3. Choose the **Pricing method**, enter the **price** (and **Unit** or tiers if needed).
4. Set **Estimated duration** and **Crew size**.
5. Open the optional sections you need and fill them in.
6. Press **Save template**. A message says the template is saved.
7. To change it later, tap its row, edit, add a **Change note** and press **Save as new version**.

Tips

- The top section is enough to start. Add the rest as you learn.
- Customer details, property measurements, job quantities, assigned employees, dates, actual costs, payment status, property notes and final results are never stored in a template; they stay on each job.
- Use the preview box (cost permission) to check margin before saving.

If something goes wrong

- **Give the service a name.** The name must be at least 2 characters.
- **Your role can’t create or change company templates.** Ask the owner.
- **Price box missing.** Tiered by size hides it; use the size tiers instead.

Settings → Show me & tools: Simple/Full and ten tool switches

The Simple or Full choice and the ten switches (Payroll export to AI marketing) that show or hide advanced tools.

Open the Contractor Hub, choose **Settings**, pick the **Business** group and the **Show me & tools** tab. It controls how much of VisionScaper you see in menus and on your Today screen. Switching never deletes or changes anything you have entered, and hidden tools can be turned back on with everything in place.

Before you start

- If the screen only says “Update the VisionScaper plugin on your website to use Simple and Full”, your site is running an older plugin. Ask the site owner to update it.
- A business that already existed when this feature arrived (version 2.26.0) is set to Full, so nobody lost anything. A business created after that starts on Simple.

Fields

Show me card

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Show me: Simple	Hides the advanced tools below until you turn each one on.	Tap the **Simple** button. A tick shows it is selected.	Saves immediately. Message: “Simple: the advanced tools are hidden. Nothing was deleted.”
Show me: Full	Shows every tool.	Tap the **Full** button.	Saves immediately. Message: “Full: every tool is shown.”

Turn on more tools card

Ten switches. A tool is shown when its own switch says so. If you never touched its switch, it follows the Show me mode (Full = shown, Simple = hidden).

Tool	What it does for VisionScaper	What to enter	Default / notes
🧮 Payroll export `tools_on.payroll` (switch)	Shows or hides this tool: “Download approved hours as a file for your payroll.” Only what is shown changes. Your information stays exactly as it is.	Slide the switch on or off. It saves at once and a message says “Payroll export is on/off.”	Follows the Show me mode until you set the switch yourself.
🏢 Overhead budget `tools_on.overhead` (switch)	Shows or hides this tool: “Plan your yearly overhead and see what every labor hour has to cover.” Only what is shown changes. Your information stays exactly as it is.	Slide the switch on or off. It saves at once and a message says “Overhead budget is on/off.”	Follows the Show me mode until you set the switch yourself.
🧾 Materials & purchases `tools_on.purchasing` (switch)	Shows or hides this tool: “Order materials, email vendors and receive deliveries.” Only what is shown changes. Your information stays exactly as it is.	Slide the switch on or off. It saves at once and a message says “Materials & purchases is on/off.”	Follows the Show me mode until you set the switch yourself.
📍 Team location `tools_on.location` (switch)	Shows or hides this tool: “See who is clocked in and where they were last seen.” Only what is shown changes. Your information stays exactly as it is.	Slide the switch on or off. It saves at once and a message says “Team location is on/off.”	Follows the Show me mode until you set the switch yourself.
🚪 Door-to-door `tools_on.canvass` (switch)	Shows or hides this tool: “Log every house you knock on, on a map.” Only what is shown changes. Your information stays exactly as it is.	Slide the switch on or off. It saves at once and a message says “Door-to-door is on/off.”	Follows the Show me mode until you set the switch yourself.
📐 Landscape plans `tools_on.plans` (switch)	Shows or hides this tool: “Measured 2D plans you can share with customers.” Only what is shown changes. Your information stays exactly as it is.	Slide the switch on or off. It saves at once and a message says “Landscape plans is on/off.”	Follows the Show me mode until you set the switch yourself.
🗺️ Route planner `tools_on.routes` (switch)	Shows or hides this tool: “Put the day’s stops in the best order.” Only what is shown changes. Your information stays exactly as it is.	Slide the switch on or off. It saves at once and a message says “Route planner is on/off.”	Follows the Show me mode until you set the switch yourself.
🔧 Equipment `tools_on.equipment` (switch)	Shows or hides this tool: “Maintenance reminders for every machine.” Only what is shown changes. Your information stays exactly as it is.	Slide the switch on or off. It saves at once and a message says “Equipment is on/off.”	Follows the Show me mode until you set the switch yourself.
📞 AI Receptionist `tools_on.receptionist` (switch)	Shows or hides this tool: “An AI that answers your phone, books visits and makes follow-up calls.” Only what is shown changes. Your information stays exactly as it is.	Slide the switch on or off. It saves at once and a message says “AI Receptionist is on/off.”	Follows the Show me mode until you set the switch yourself.
📣 AI marketing `tools_on.ai_marketing` (switch)	Shows or hides this tool: “AI finds who to contact and writes the message for you.” Only what is shown changes. Your information stays exactly as it is.	Slide the switch on or off. It saves at once and a message says “AI marketing is on/off.”	Follows the Show me mode until you set the switch yourself.

Steps

1. Open **Settings → Business → Show me & tools**.
2. Choose **Simple** if you want a calmer screen, or **Full** to see everything.
3. Under **Turn on more tools**, slide on the switches for the tools you use. For example, switch on **Route planner** if you plan daily routes.

4. Each change saves by itself. The page redraws and a message confirms it.
5. Check the Hub menu: the tool now appears or disappears.

Tips

- If you open a hidden tool by an old link or bookmark, a notice at the top says it is off and gives a **Turn on** button.
- Switches only show or hide. Scheduled jobs, saved data and permissions behave as before.
- Start on Simple, then add tools as you need them.

If something goes wrong

- **A switch will not change.** It is disabled while saving; wait a moment, then try again. If it keeps failing, reload the Hub.
- **The menu did not change.** Reload the page; the menu is redrawn after the switch saves.
- **Not enough room on the phone menu.** Hide tools you do not use here, or use the Layout tab to hide areas.

Settings → Costs & markups: every cost, markup and tax box

Labor cost, overhead, minimum job, mobilization, pricing method, seven markups, target margin, sales tax, deposit, rounding and quote validity.

Open the Contractor Hub, choose **Settings**, pick the **Prices and quotes** group and the **Costs & markups** tab. This tab holds the numbers that turn quantities into a price: your cost of labor, overhead, markups or margin, tax, deposit, rounding and how proposals show prices. It has two cards, **Your costs** and **Your price to the customer**, and one button.

> Warning: Every dollar amount and percentage shipped as a default on this tab is a placeholder, not approved. Set your own figures. The defaults are listed so you can see what you start from.

Before you start

- Your real labor cost per crew-member hour (wage plus payroll taxes, workers' comp and insurance).
- Your overhead percentage (trucks, office, insurance) and your minimum job.
- Your state's sales tax rule. Check with your accountant.

Fields: Your costs

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Labor cost per hour ($) `laborRate`	Your burdened cost for one crew-member hour. Used wherever labor in an estimate has no rate of its own. The box hint says "burdened".	A number such as your wage plus payroll taxes, workers' comp and insurance, per hour.	Default 38 (placeholder, not approved; set your own).
Overhead (%) `overheadPct`	Added to direct cost to get your true cost. Hint: trucks, office, insurance. In Target gross margin mode it is also built into the price.	A percentage, e.g. your overhead as a share of direct cost.	Default 12 (placeholder, not approved).
Minimum job ($) `minJob`	If a quote's total price is below this amount, it is raised to this amount and the proposal notes the minimum job charge added.	A dollar amount.	Default 350 (placeholder, not approved).
Mobilization per job ($) `mobilization`	A flat charge added once to every quote that has a price.	A dollar amount. 0 means none.	Default 0.

Fields: Your price to the customer

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Pricing method `mode`	Chooses how cost becomes price. Markup by category: each cost type gets its own markup on top. Target gross margin: everything is priced so gross profit is the target % of the price. (A 50% markup equals a 33% margin.)	Pick from the drop-down.	Default Markup by category.
Materials markup % `markup.material`	Markup added on top of material cost (Markup mode).	A percentage.	Default 50 (placeholder, not approved).
Labor markup % `markup.labor`	Markup on labor cost.	A percentage.	Default 100 (placeholder, not approved).
Equipment markup % `markup.equipment`	Markup on equipment cost.	A percentage.	Default 30 (placeholder, not approved).
Subcontractors markup % `markup.sub`	Markup on subcontractor cost.	A percentage.	Default 20 (placeholder, not approved).
Disposal markup % `markup.disposal`	Markup on disposal cost.	A percentage.	Default 25 (placeholder, not approved).
Delivery markup % `markup.delivery`	Markup on delivery cost.	A percentage.	Default 20 (placeholder, not approved).
Other markup % `markup.other`	Markup on anything not in the six groups above.	A percentage.	Default 30 (placeholder, not approved).
Target gross margin (%) `marginPct`	The profit share of the price you want. Only used when Pricing method is Target gross margin (box hint: "margin mode only").	A percentage below 100.	Default 40 (placeholder, not approved).
Sales tax (%) `taxPct`	Tax added to proposals. Hint: your state's rate (the hint cites 6.35% for CT); check with your accountant.	A percentage.	Default 6.35 (placeholder, not approved).

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Tax applies to `taxOn`	Which part of the job is taxed.	Whole job (e.g. CT, where landscaping is taxable) / Materials only / No sales tax.	Default Whole job.
Deposit when signed (%) `depositPct`	The deposit due when the customer signs. Also the default deposit line in the payment schedule.	A percentage.	Default 30 (placeholder, not approved).
Round section prices up to ($) `roundTo`	Each section price is rounded up to a multiple of this amount (unless you typed a price yourself).	e.g. a whole dollar step. 0 turns rounding off.	Default 5 (placeholder, not approved).
Quotes are good for (days) `validDays`	Default “Price good until” date on new quotes, counted from today.	A number of days.	Default 30 (placeholder, not approved).
On proposals show `showPrices`	Whether the customer sees a price for each section or only the total. Each quote can override it.	Price for each section / Total only.	Default Price for each section.
Save costs & markups (button)	Stores everything on this tab.	Press once.	Message “Saved.”

Steps

1. Open **Settings → Prices and quotes → Costs & markups**.
2. In **Your costs**, enter **Labor cost per hour ($)** and **Overhead (%)**, then **Minimum job ($)** and **Mobilization per job ($)**.
3. In **Your price to the customer**, pick the **Pricing method**.
4. If you chose Markup by category, fill the seven markup boxes. If you chose Target gross margin, fill **Target gross margin (%)**.
5. Set **Sales tax (%)** and **Tax applies to**.
6. Set **Deposit when signed (%)**, **Round section prices up to ($)** and **Quotes are good for (days)**.
7. Choose **On proposals show**.
8. Press **Save costs & markups** and wait for “Saved.”
9. Open one quote to see the new numbers.

Tips

- A box left empty, or with text that is not a number, is saved as 0. Fill every number.
- Markup and margin are different. 50% markup equals a 33% margin.
- A different tax rate or a changed deposit applies to quotes you open or create afterwards.

If something goes wrong

- **A quote total looks too high.** Check Minimum job and Mobilization; both are added to any quote.
- **Margin mode ignores my markups.** That is by design. Switch the Pricing method back to Markup by category.
- **Saved does not show.** The button is disabled while saving. If it fails, an error message is shown; try again.

Settings → Price book: beds, stone, edging, sod, seed, grading, delivery, cleanup

Every price-book number for mulch, stone, new beds, edging, sod, seed, grading, delivery and final cleanup, with what each does.

Open the Contractor Hub, choose **Settings**, pick the **Prices and quotes** group and the **Price book** tab. The price book is your supplier prices and production rates. Every number feeds the automatic estimate when a Landscape plan is priced. The tab is one list of folding sections (you click a section's name to open it). This article covers the sections for beds, stone, edging, lawns, grading, delivery and cleanup. Hard surfaces and walls are in one article, plants, removals and lighting in another.

> Warning: Every figure shipped in the price book is a placeholder, not approved. They are Connecticut ballpark figures and the book itself says costs are YOUR cost. Replace each with your own cost before you quote anybody.

Before you start

- A current price list from your suppliers (mulch, stone, sod, seed, topsoil, edging, delivery).
- Your own crew's production speed (hours per unit). Use recent jobs if you can.
- Know how the screen works. The hint at the top says: "Your supplier prices and production rates. Every number here feeds the automatic estimate. Pairs like 'steel: 3.25, 0.06' are cost per foot and hours per foot."

How the screen works

- Each section (for example **Mulch**) is a closed bar. Click it to open the boxes inside.
- Every box is a text box that takes a number. A box with two or three numbers separated by commas holds a cost and the hours (and sometimes a third value).
- Only the boxes you change are stored as your own. The rest keep following VisionScaper's placeholders.
- **Save price book** stores your changes. **Reset to defaults** asks you to confirm, then removes all of your overrides across the whole book.
- Some entries are not shown here because they are words, not numbers (for example the list of mulch types and stone types). They cannot be edited on this tab.
- Labels without a units note come straight from the setting name (for example "Tons Per Cy"). Read them as in the tables below.

Fields

Mulch

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Cost per unit ($) `book.mulch.cost`	Your cost for one cubic yard of mulch (the item unit is yd³).	A decimal number.	Default 38 (placeholder, not approved)
Waste / overage (%) `book.mulch.waste`	Extra mulch ordered for waste, as a percent of the volume needed.	A decimal number.	Default 5 (placeholder, not approved)
Hours per unit `book.mulch.hrsPerUnit`	Labor hours to spread one cubic yard.	A decimal number.	Default 0.75 (placeholder, not approved)
Prep hours per 100 sq ft `book.mulch.prepPer100`	Bed prep labor hours for each 100 sq ft of bed.	A decimal number.	Default 0.5 (placeholder, not approved)

Decorative stone

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Cost per unit ($) `book.stone.cost`	Your cost per ton of decorative stone.	A decimal number.	Default 62 (placeholder, not approved)
Tons Per Cy `book.stone.tonsPerCy`	Tons of stone in one cubic yard; converts the volume needed into tons to buy.	A decimal number.	Default 1.35 (placeholder, not approved)
Waste / overage (%) `book.stone.waste`	Extra stone for waste, in percent.	A decimal number.	Default 5 (placeholder, not approved)
Hours per unit `book.stone.hrsPerUnit`	Labor hours to spread one ton.	A decimal number.	Default 1 (placeholder, not approved)
Fabric `book.stone.fabric`	Cost per square foot of landscape fabric put under the stone.	A decimal number.	Default 0.14 (placeholder, not approved)

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Fabric Per100 `book.stone.fabricPer100`	Labor hours to install fabric for each 100 sq ft.	A decimal number.	Default 0.4 (placeholder, not approved)

New bed (turf removal & soil prep)

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Remove Per100 `book.newbed.removePer100`	Labor hours to remove turf and roots for each 100 sq ft of a new bed.	A decimal number.	Default 1.5 (placeholder, not approved)
Till Per100 `book.newbed.tillPer100`	Labor hours to till the amendment into the soil for each 100 sq ft.	A decimal number.	Default 0.5 (placeholder, not approved)
Compost Cost `book.newbed.compostCost`	Your cost per cubic yard of compost or soil amendment.	A decimal number.	Default 46 (placeholder, not approved)
Compost In `book.newbed.compostIn`	Inches of compost worked into a new bed. Also printed in the scope as “Work N" of compost”.	A decimal number.	Default 2 (placeholder, not approved)
Sod Depth In `book.newbed.sodDepthIn`	Inches of turf and soil removed; used to work out the disposal volume.	A decimal number.	Default 3 (placeholder, not approved)
Disposal Per Cy `book.newbed.disposalPerCy`	Your disposal cost per cubic yard of turf and soil hauled away.	A decimal number.	Default 45 (placeholder, not approved)
Sod Cutter Day `book.newbed.sodCutterDay`	Rental price for a sod cutter for one day.	A decimal number.	Default 95 (placeholder, not approved)
Sod Cutter Min `book.newbed.sodCutterMin`	Smallest bed area (sq ft) at which a sod cutter rental is added to the estimate.	A decimal number.	Default 250 (placeholder, not approved)

Edging

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Steel `book.edging.steel`	Steel edging: first number is your cost per linear foot, second is install hours per linear foot.	A number. Arrays (comma list) take values separated by commas.	Default 3.25, 0.06
Aluminum `book.edging.aluminum`	Aluminum edging: cost per linear foot, then hours per linear foot.	A number. Arrays (comma list) take values separated by commas.	Default 2.85, 0.06
Plastic `book.edging.plastic`	Plastic edging: cost per linear foot, then hours per linear foot.	A number. Arrays (comma list) take values separated by commas.	Default 0.95, 0.05
Stone `book.edging.stone`	Stone or paver edging: cost per linear foot, then hours per linear foot.	A number. Arrays (comma list) take values separated by commas.	Default 4.1, 0.12
Brick `book.edging.brick`	Brick edging: cost per linear foot, then hours per linear foot.	A number. Arrays (comma list) take values separated by commas.	Default 3.6, 0.12
Natural `book.edging.natural`	Natural spade-cut edge: material cost per linear foot (0 means no material line), then hours per linear foot.	A number. Arrays (comma list) take values separated by commas.	Default 0, 0.04

Sod

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Cost per unit ($) `book.sod.cost`	Your cost for one pallet of sod.	A decimal number.	Default 190 (placeholder, not approved)
Sf Per Pallet `book.sod.sfPerPallet`	Square feet of lawn one pallet covers; sets how many pallets are ordered.	A decimal number.	Default 450 (placeholder, not approved)
Waste / overage (%) `book.sod.waste`	Extra sod for cuts and waste, in percent.	A decimal number.	Default 5 (placeholder, not approved)
Prep hours per 100 sq ft `book.sod.prepPer100`	Soil prep and grading hours for each 100 sq ft.	A decimal number.	Default 0.6 (placeholder, not approved)
Lay Per100 `book.sod.layPer100`	Hours to lay and roll sod for each 100 sq ft.	A decimal number.	Default 0.5 (placeholder, not approved)
Topsoil In `book.sod.topsoilIn`	Inches of screened topsoil added under the sod.	A decimal number.	Default 1 (placeholder, not approved)
Topsoil Cost `book.sod.topsoilCost`	Your cost per cubic yard of screened topsoil.	A decimal number.	Default 42 (placeholder, not approved)

Seed

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Lbs Per1000 `book.seed.lbsPer1000`	Pounds of seed spread per 1,000 sq ft (also printed in the scope).	A decimal number.	Default 8 (placeholder, not approved)

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Lb Cost `book.seed.lbCost`	Your cost per pound of seed.	A decimal number.	Default 4.5 (placeholder, not approved)
Straw Per1000 `book.seed.strawPer1000`	Bales of seed straw per 1,000 sq ft.	A decimal number.	Default 2 (placeholder, not approved)
Straw Cost `book.seed.strawCost`	Your cost per bale of straw.	A decimal number.	Default 9 (placeholder, not approved)
Prep hours per 100 sq ft `book.seed.prepPer100`	Prep, seeding and covering hours per 100 sq ft.	A decimal number.	Default 0.5 (placeholder, not approved)
Topsoil In `book.seed.topsoilIn`	Inches of screened topsoil added.	A decimal number.	Default 0.5 (placeholder, not approved)
Topsoil Cost `book.seed.topsoilCost`	Your cost per cubic yard of topsoil.	A decimal number.	Default 42 (placeholder, not approved)

Grading

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Hrs Per100 `book.grade.hrsPer100`	Rough and finish grading hours for each 100 sq ft.	A decimal number.	Default 0.35 (placeholder, not approved)
Topsoil In `book.grade.topsoilIn`	Inches of screened topsoil spread on a grading area.	A decimal number.	Default 2 (placeholder, not approved)
Topsoil Cost `book.grade.topsoilCost`	Your cost per cubic yard of screened topsoil.	A decimal number.	Default 42 (placeholder, not approved)

Delivery

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Cost per unit ($) `book.delivery.cost`	Your price for one delivery load.	A decimal number.	Default 85 (placeholder, not approved)
Load Cy `book.delivery.loadCy`	Cubic yards one delivery load carries; sets how many loads the estimate adds for mulch and stone.	A decimal number.	Default 15 (placeholder, not approved)

Final cleanup

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Hrs `book.cleanup.hrs`	Hours added as the final cleanup line (blow off hard surfaces, final walkthrough) on any estimate that has work sections.	A decimal number.	Default 1.5 (placeholder, not approved)

Buttons

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Save price book (button)	Stores your edited numbers.	Press once after editing.	Message “Saved.”
Reset to defaults (button)	Removes all your overrides in every section so the placeholder numbers come back.	Press, then OK on the confirmation “Reset the whole price book to VisionScaper defaults?”.	Cannot be undone; the screen redraws with the defaults.

Steps

1. Open **Settings → Prices and quotes → Price book**.
2. Click **Mulch** and enter your cost per cubic yard, waste percent and the hours you need per yard.
3. Work down the list: Decorative stone, New bed, Edging, Sod, Seed, Grading, Delivery and Final cleanup. Open only the sections you quote.
4. For Edging, type both numbers with a comma between them, for example the cost, then the hours (the placeholder pairs look like “3.25, 0.06”).
5. Press **Save price book** and wait for “Saved.”
6. Open a priced Landscape plan to confirm the new numbers are used.

Tips

- Costs are your cost, not your selling price. Selling price comes from the markups in Costs & markups.
- Update prices at the start of each season; mulch, stone and sod change often.
- Leave a section alone if you never quote that work. The placeholder numbers will not hurt, but they are not yours.

If something goes wrong

- **My number turned into 0.** A box that is empty or holds text that is not a number is saved as 0. Retype it.
- **An edging number was ignored.** Edging boxes need a comma between the numbers. Without it only one number is read.
- **Saved is not shown.** The error message tells you why; try again.
- **I want the original back.** Press **Reset to defaults**.

Settings → Price book: pavers, gravel path, retaining wall, boulders, fence

Every price-book number for pavers, gravel path, retaining walls, boulders and fences, with what each does.

This is the second part of **Settings → Prices and quotes → Price book**. It covers the sections for hard surfaces and structures: **Pavers**, **Gravel path**, **Retaining wall**, **Boulders** and **Fence**. The way the screen works is explained in the first price book article.

> Warning: Every figure here is a placeholder, not approved. Replace each with your own supplier cost and your own crew production before you quote.

Before you start

- Supplier prices for pavers or stone, base gravel, sand, edge restraint, joint sand, wall block and caps, drain pipe, fabric, geogrid and fence by the foot.
- Your crew's real production: square feet laid per day and hours per unit.
- Rental prices for the compactor, wet saw and machines you use.

Fields

Pavers

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Cost per sq ft ($) `book.pavers.sfCost`	Your cost per square foot of paver or stone material.	A decimal number.	Default 4.6 (placeholder, not approved)
Waste / overage (%) `book.pavers.waste`	Extra material for cuts, in percent, on straight work.	A decimal number.	Default 8 (placeholder, not approved)
Curve Waste `book.pavers.curveWaste`	Extra material in percent when the patio or walk has curves.	A decimal number.	Default 12 (placeholder, not approved)
Base In `book.pavers.baseIn`	Inches of compacted gravel base.	A decimal number.	Default 6 (placeholder, not approved)
Bedding In `book.pavers.beddingIn`	Inches of bedding sand.	A decimal number.	Default 1 (placeholder, not approved)
Paver In `book.pavers.paverIn`	Paver thickness in inches. Added to base and bedding depth to work out how deep to dig.	A decimal number.	Default 2.375 (placeholder, not approved)
Gravel Ton Cost `book.pavers.gravelTonCost`	Your cost per ton of processed gravel base.	A decimal number.	Default 32 (placeholder, not approved)
Sand Ton Cost `book.pavers.sandTonCost`	Your cost per ton of bedding sand.	A decimal number.	Default 38 (placeholder, not approved)
Tons Per Cy `book.pavers.tonsPerCy`	Tons per cubic yard of base and sand; turns volume into tons.	A decimal number.	Default 1.4 (placeholder, not approved)
Compact `book.pavers.compact`	Multiplier for gravel base that compacts (1.15 means 15 percent extra).	A decimal number.	Default 1.15 (placeholder, not approved)
Restraint Lf `book.pavers.restraintLf`	Your cost per linear foot of edge restraint with spikes.	A decimal number.	Default 1.6 (placeholder, not approved)
Poly Bag Cost `book.pavers.polyBagCost`	Your cost per bag of polymeric joint sand.	A decimal number.	Default 36 (placeholder, not approved)
Sf Per Bag `book.pavers.sfPerBag`	Square feet one bag of joint sand covers.	A decimal number.	Default 75 (placeholder, not approved)
Hours per sq ft `book.pavers.hrsPerSf`	Labor hours per square foot to base, screed, lay and cut pavers.	A decimal number.	Default 0.12 (placeholder, not approved)
Excav Hrs Per Cy `book.pavers.excavHrsPerCy`	Excavation labor hours per cubic yard dug.	A decimal number.	Default 0.6 (placeholder, not approved)
Disposal Per Cy `book.pavers.disposalPerCy`	Your disposal cost per cubic yard of excavated soil.	A decimal number.	Default 45 (placeholder, not approved)
Compactor Day `book.pavers.compactorDay`	Plate compactor rental for one day.	A decimal number.	Default 95 (placeholder, not approved)
Saw Day `book.pavers.sawDay`	Wet saw rental for one day.	A decimal number.	Default 90 (placeholder, not approved)
Machine Day `book.pavers.machineDay`	Skid steer or mini excavator price for one day.	A decimal number.	Default 350 (placeholder, not approved)
Machine Min Sf `book.pavers.machineMinSf`	Smallest area in square feet at which a machine day is added.	A decimal number.	Default 250 (placeholder, not approved)

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Sf Per Day `book.pavers.sfPerDay`	Square feet your crew lays in a day; sets the number of days for equipment.	A decimal number.	Default 300 (placeholder, not approved)
Step Cost `book.pavers.stepCost`	Your cost for one step (block or stone tread).	A decimal number.	Default 260 (placeholder, not approved)
Step Hrs `book.pavers.stepHrs`	Labor hours to build one step.	A decimal number.	Default 4 (placeholder, not approved)

Gravel path

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Base In `book.gravelpath.baseIn`	Inches of gravel base for a gravel path.	A decimal number.	Default 4 (placeholder, not approved)
Stone In `book.gravelpath.stoneIn`	Inches of surface stone on the path.	A decimal number.	Default 2 (placeholder, not approved)
Hours per sq ft `book.gravelpath.hrsPerSf`	Labor hours per square foot of path.	A decimal number.	Default 0.05 (placeholder, not approved)

Retaining wall

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Block Sf `book.wall.blockSf`	Face area in square feet that one wall block covers.	A decimal number.	Default 0.667 (placeholder, not approved)
Cost per block ($) `book.wall.blockCost`	Your cost per wall block.	A decimal number.	Default 4.4 (placeholder, not approved)
Cap Per Lf `book.wall.capPerLf`	Caps needed per linear foot of wall.	A decimal number.	Default 0.75 (placeholder, not approved)
Cost per cap ($) `book.wall.capCost`	Your cost per wall cap.	A decimal number.	Default 6.8 (placeholder, not approved)
Waste / overage (%) `book.wall.waste`	Extra blocks and caps for waste, in percent.	A decimal number.	Default 5 (placeholder, not approved)
Base Gravel Cy Per Lf `book.wall.baseGravelCyPerLf`	Cubic yards of base gravel per linear foot of wall.	A decimal number.	Default 0.037 (placeholder, not approved)
Backfill Cy Per Face Sf `book.wall.backfillCyPerFaceSf`	Cubic yards of drainage stone backfill per square foot of wall face.	A decimal number.	Default 0.037 (placeholder, not approved)
Gravel Ton Cost `book.wall.gravelTonCost`	Your cost per ton of gravel (base and backfill).	A decimal number.	Default 32 (placeholder, not approved)
Drain Lf `book.wall.drainLf`	Your cost per linear foot of perforated drain pipe.	A decimal number.	Default 1.25 (placeholder, not approved)
Fabric Lf `book.wall.fabricLf`	Your cost per linear foot of filter fabric.	A decimal number.	Default 0.9 (placeholder, not approved)
Hours per face sq ft `book.wall.hrsPerFaceSf`	Labor hours per square foot of wall face.	A decimal number.	Default 0.25 (placeholder, not approved)
Excav Hrs Per Lf `book.wall.excavHrsPerLf`	Excavation hours per linear foot of wall.	A decimal number.	Default 0.15 (placeholder, not approved)
Geogrid Lf `book.wall.geogridLf`	Your cost per linear foot of geogrid (added for walls taller than 3 ft).	A decimal number.	Default 2.4 (placeholder, not approved)
Machine Day `book.wall.machineDay`	Mini excavator price for one day.	A decimal number.	Default 350 (placeholder, not approved)
Machine Min Lf `book.wall.machineMinLf`	Smallest wall length in feet at which an excavator is added.	A decimal number.	Default 25 (placeholder, not approved)

Boulders

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Cost per unit ($) `book.boulder.cost`	Your cost for one boulder.	A decimal number.	Default 140 (placeholder, not approved)
Hrs `book.boulder.hrs`	Labor hours to set one boulder.	A decimal number.	Default 0.75 (placeholder, not approved)
Machine Day `book.boulder.machineDay`	Skid steer price for one day, added when three or more boulders are set.	A decimal number.	Default 350 (placeholder, not approved)

Fence

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Vinyl `book.fence.vinyl`	Vinyl fence: first number is your cost per linear foot, second is install hours per linear foot.	Two numbers separated by a comma.	Default 24, 0.35
Wood `book.fence.wood`	Wood fence: cost per linear foot, then hours per linear foot.	Two numbers separated by a comma.	Default 19, 0.35
Aluminum `book.fence.aluminum`	Aluminum fence: cost per linear foot, then hours per linear foot.	Two numbers separated by a comma.	Default 32, 0.35
Splitrail `book.fence.splitrail`	Split-rail fence: cost per linear foot, then hours per linear foot.	Two numbers separated by a comma.	Default 9, 0.2
Chainlink `book.fence.chainlink`	Chain-link fence: cost per linear foot, then hours per linear foot.	Two numbers separated by a comma.	Default 14, 0.25

Buttons

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Save price book (button)	Stores your edited numbers, for this and every other section.	Press once after editing.	Message “Saved.”
Reset to defaults (button)	Clears all your overrides everywhere in the price book.	Press, then OK to confirm.	Cannot be undone.

Steps

1. Open **Settings → Prices and quotes → Price book**.
2. Click **Pavers**. Enter your material cost per square foot and waste percents, then the base, sand and paver depths you build to.
3. Enter your gravel, sand, restraint and joint sand costs, then the labor hours and your daily rental prices.
4. Open **Gravel path**, **Retaining wall**, **Boulders** and **Fence** and fill them the same way. For each fence type type two numbers with a comma (cost per foot, hours per foot).
5. Press **Save price book**.
6. Price a sample patio or wall in the Landscape plan tool and check that the totals look right.

Tips

- Hours-per-unit boxes matter as much as costs. Time a real job once.
- Leave a section you never sell untouched; it will not be used unless a plan includes that item.
- A wall taller than 3 ft automatically adds geogrid, so the geogrid cost matters for tall walls.

If something goes wrong

- **A value reverted to 0.** An empty or non-number box is saved as 0.
- **A fence price looks wrong.** Both numbers must be separated by a comma: cost first, hours second.
- **Totals did not change.** Quotes already saved keep their old numbers; open or re-price the plan.

Settings → Price book: plants, removals, landscape lighting

Every price-book number for plant types, removals and landscape lighting, including the three-number boxes.

This is the third part of **Settings → Prices and quotes → Price book**. It covers **Plants**, **Removals** and **Landscape lighting**. Plants and Removals boxes hold three numbers each, separated by commas. The Plants section also has a size note for each type that cannot be edited here (for example “#3 container” for shrubs).

> Warning: Every figure here is a placeholder, not approved. Replace each with your own costs and times.

Before you start

- Your nursery price list: cost per tree, evergreen, shrub, perennial, grass, annual and vine in the sizes you normally sell.
- Hours you spend to plant each type, and the cost of planting mix and stakes per plant.
- Your disposal fees, and how long removals take.
- Your cost for lighting fixtures, transformers and wire.

How to enter the three-number boxes

A box such as Trees shows three numbers separated by commas. Keep the order exactly: for Plants the order is cost, hours, planting mix. For Removals the order is first value (unused), hours, disposal cost. If you type a different number of values the estimate may read the wrong one, so always type all three and keep the commas.

Fields

Plants

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Trees `book.plants.trees`	Trees: three numbers separated by commas. First your cost per plant, second install hours per plant, third your cost of planting mix, starter fertilizer and stakes per plant.	Three numbers separated by commas.	Default 260, 2, 15
Evergreens `book.plants.evergreens`	Evergreens: cost per plant, install hours per plant, planting mix and stakes per plant.	Three numbers separated by commas.	Default 215, 1.75, 12
Shrubs `book.plants.shrubs`	Shrubs: cost per plant, install hours per plant, planting mix per plant.	Three numbers separated by commas.	Default 46, 0.5, 4
Perennials `book.plants.perennials`	Perennials: cost per plant, install hours per plant, planting mix per plant.	Three numbers separated by commas.	Default 14, 0.15, 1
Grasses `book.plants.grasses`	Ornamental grasses: cost per plant, install hours per plant, planting mix per plant.	Three numbers separated by commas.	Default 22, 0.25, 1.5
Annuals `book.plants.annuals`	Annuals: cost per plant, install hours per plant, planting mix per plant.	Three numbers separated by commas.	Default 5, 0.06, 0.25
Vines `book.plants.vines`	Vines: cost per plant, install hours per plant, planting mix per plant.	Three numbers separated by commas.	Default 26, 0.3, 2
Features `book.plants.features`	Plant features: cost per item (0 means none), install hours, planting mix amount.	Three numbers separated by commas.	Default 0, 0.5, 0

Removals

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Tree `book.removal.tree`	Tree removal: three numbers. The first is not used by the removal calculation in the code. The second is labor hours per tree. The third is disposal cost per tree.	Three numbers separated by commas.	Default 0, 4, 150
Shrub `book.removal.shrub`	Shrub removal: first number not used; hours per shrub; disposal cost per shrub.	Three numbers separated by commas.	Default 0, 0.75, 15
Plant `book.removal.plant`	Other plant removal: first number not used; hours per plant; disposal cost per plant.	Three numbers separated by commas.	Default 0, 0.2, 2
Lawn `book.removal.lawn`	Lawn removal: first number not used; labor hours per 100 sq ft; disposal cost per cubic yard.	Three numbers separated by commas.	Default 0, 1.5, 45
Stump `book.removal.stump`	Stump removal: first number not used; hours per stump; disposal cost (0 = none).	Three numbers separated by commas.	Default 0, 1.5, 0
Patio `book.removal.patio`	Patio, walkway or driveway removal: first number not used; hours per 100 sq ft; disposal cost per cubic yard.	Three numbers separated by commas.	Default 0, 0.08, 45
Fence `book.removal.fence`	Fence removal: first number not used; hours per linear foot; disposal cost per linear foot.	Three numbers separated by commas.	Default 0, 0.15, 6

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Structure `book.removal.structure`	Structure removal: first number not used; hours per 100 sq ft; disposal cost per cubic yard.	Three numbers separated by commas.	Default 0, 6, 250
Other `book.removal.other`	Anything else (boulders, features): first number not used; hours per item; disposal cost per item.	Three numbers separated by commas.	Default 0, 1, 25

Landscape lighting

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Fixture cost ($) `book.lighting.fixture`	Your cost for one LED light fixture.	A decimal number.	Default 115 (placeholder, not approved)
Fixture Hrs `book.lighting.fixtureHrs`	Labor hours to install one fixture.	A decimal number.	Default 0.6 (placeholder, not approved)
Transformer cost ($) `book.lighting.transformer`	Your cost for one low-voltage transformer with photocell timer.	A decimal number.	Default 285 (placeholder, not approved)
Transformer Hrs `book.lighting.transformerHrs`	Labor hours to mount a transformer and connect wire.	A decimal number.	Default 1.5 (placeholder, not approved)
Per Transformer `book.lighting.perTransformer`	How many fixtures one transformer runs; sets the number of transformers.	A decimal number.	Default 18 (placeholder, not approved)
Wire Lf `book.lighting.wireLf`	Your cost per linear foot of direct-burial wire.	A decimal number.	Default 0.95 (placeholder, not approved)
Wire Per Fixture `book.lighting.wirePerFixture`	Feet of wire assumed per fixture when the plan has no wire drawn.	A decimal number.	Default 25 (placeholder, not approved)
Wire Hrs Per Lf `book.lighting.wireHrsPerLf`	Labor hours per linear foot to trench and connect wire.	A decimal number.	Default 0.02 (placeholder, not approved)

Buttons

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Save price book (button)	Stores your edited numbers.	Press once after editing.	Message “Saved.”
Reset to defaults (button)	Clears all your overrides everywhere in the price book.	Press, then OK to confirm.	Cannot be undone.

Steps

1. Open **Settings → Prices and quotes → Price book** and click **Plants**.
2. For each plant type, replace the three numbers: cost per plant, hours per plant, planting mix per plant. Keep the commas.
3. Click **Removals** and set hours and disposal for each thing you remove. Leave the first number as it is.
4. Click **Landscape lighting** and enter fixture, transformer, wire and hours.
5. Press **Save price book**.
6. Price a plan with plants and a removal to check the numbers.

Tips

- The plant cost in the price book is the default; a plant you pick from the library can carry its own cost, and that wins.
- A plant with a price of 0 in the book is flagged as needing a price.
- Removals add a stump grinder day for trees at a fixed amount that is not on this screen.

If something goes wrong

- **Only one number is used.** You left out commas or numbers. Retype all three.
- **A removal has no disposal line.** The third value is 0, so no disposal line is added.
- **My lighting total is zero.** The plan needs at least one light drawn; lighting is priced only when lights exist.

Settings → Terms & payments: proposal terms and payment schedule

The proposal terms box, its seven standard lines and every row, button and field of the default payment schedule.

Open the Contractor Hub, choose **Settings**, pick the **Prices and quotes** group and the **Terms & payments** tab. It holds the fine print shown on every proposal and the default payment schedule new quotes start with. You can still change both on each individual quote.

Before you start

- Read your own contract language or ask your lawyer to review the terms. VisionScaper supplies standard wording as a starting point only.
- Decide your payment milestones, for example a deposit and a balance on completion. The deposit percentage default comes from Costs & markups.

Fields

Proposal terms card

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Proposal terms (large text box, 12 rows)	The terms printed on every proposal above the signature line. Edit them to match your business.	Plain text, one point per line. Up to 8000 characters are kept.	When you have never saved terms the box starts with seven standard lines (listed below).

The seven standard lines in the box when you first open it:

- Price includes all labor, materials, equipment and disposal listed in the proposal. Anything not listed is not included.
- A deposit is due when you sign; the balance is due on completion unless progress payments are listed.
- You call Call Before You Dig (811) before digging; private lines (irrigation, lighting, invisible fence, propane) are not marked by 811, so the customer must show you where they are.
- Quantities are measured from the plan; hidden conditions (ledge, buried debris, drainage problems) stop the work until a change is agreed in writing.
- Plants are guaranteed for one year from planting when watered as instructed; damage from deer, drought, storms or neglect is not covered.
- Changes after signing are made by written change order.
- Pricing is valid until the date shown.

> Warning: These standard lines contain promises, such as a one-year plant guarantee. They are only a starting point and are not approved wording for your business. Change them to what you really offer.

Default payment schedule card

Each row is one payment. The rows start as a deposit and a balance.

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Payment name (first box in a row) `label`	The name of the payment as shown to the customer.	Text such as Deposit to schedule, Balance, or Progress payment.	Starts as “Deposit to schedule” and “Balance”.
Percent (number box with % next to it) `pct`	The share of the total due for this payment.	A number. Make all the rows add up to 100.	Starts as your Deposit when signed (%) from Costs & markups, and 100 minus that for the balance.
When (last text box) `when`	When this payment is due.	Words, e.g. when you sign, on completion.	Starts as “when you sign” and “on completion”.
Remove (× button at the end of a row)	Deletes that row.	Press the ×.	Takes effect when you press Save.
+ Add payment (link under the rows)	Adds another row named “Partial payment” with 0 percent and an empty When.	Press it, then fill the new row.	—

Save

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Save (button)	Stores the terms and the whole payment schedule together.	Press once after editing.	Message “Saved.”

Steps

1. Open **Settings → Prices and quotes → Terms & payments**.
2. Read each line in **Proposal terms**. Edit, delete or add lines so they describe how you really work.
3. In **Default payment schedule**, edit the name, percent and timing of each row.
4. Press **+ Add payment** for each extra milestone. Make all percents add up to 100.
5. Press **Save** and wait for “Saved.”
6. Open a new quote and check the terms and payments on the proposal.

Tips

- Percents are not checked for you. Add them up yourself.
- You can change the terms on each individual quote. Whether editing them here changes quotes already written is not verified in code.
- Keep each term short and in plain language. Customers read these before they sign.

If something goes wrong

- **My changes are gone.** You must press Save. Leaving the tab without saving drops edits.
- **The proposal shows old terms.** Edit the terms on the quote itself.
- **A row will not delete.** Press Save after pressing ×; the row disappears on screen at once but is stored only when saved.

Hub Settings: groups, tabs and the search box

How the Hub Settings screen is organised into five groups and 17 tabs, how its search box works, and which article covers each tab.

Every Hub setting lives in **Settings** in the Contractor Hub menu. This article explains the parts that sit above all the tabs: the five groups, the tab buttons and the search box. It also lists which article covers each of your eight tabs, plus the other settings tabs in the same groups.

Before you start

- You need an approved contractor account to see Settings.
- Some tabs only show data your plan or role allows.

Fields

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Search settings (search box at the top)	Finds a setting by name and jumps to the tab, scrolls to it and highlights it for a moment. Matches the setting name, related words, the tab and the group. Old names also work (for example “Webhook”, “Purchasing”, “Canvass”).	Type at least 2 letters, e.g. “tax”, “logo” or “deposit”, then press Enter or tap a result. Esc clears it.	Placeholder text reads: Search settings: try “tax”, “logo”, “deposit”…. If nothing matches it says “No setting has that name. Try another word.”
Group buttons (row 1)	Switch between five groups: Business, Prices and quotes, Money, Team, Messages and connections.	Tap a group. It opens the first tab of that group.	—
Tab buttons (row 2)	The tabs inside the chosen group.	Tap a tab.	The row is hidden for a group with only one tab.

Where each tab is

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Business › Business profile	Name, phone, licence, address, radius, services, logo, Get started guide.	Read: settings-business-profile.	Covered.
Business › 🎨 Appearance & layout	Theme, colors, text, shape, layout, history, site controls.	Read the five Appearance articles.	Covered.
Business › 🔗 Social & gallery	Eight links and the work gallery.	Read: settings-social-and-gallery.	Covered.
Business › 🧩 Services	Opens the Services area for service templates and versions.	Read: settings-services-templates-and-versions and settings-service-template-editor.	Covered.
Business › 🧰 Show me & tools	Simple or Full and ten tool switches.	Read: settings-show-me-and-tools.	Covered.
Prices and quotes › Costs & markups	Costs, markups, tax, deposit, rounding.	Read: settings-costs-and-markups.	Covered.
Prices and quotes › Price book	Supplier prices and production rates.	Read the three price book articles.	Covered.
Prices and quotes › Terms & payments	Proposal terms and default payment schedule.	Read: settings-terms-and-payments.	Covered.
Prices and quotes › Follow-up plan	Your default follow-up plan after you send a quote.	Not covered here.	Other writer.
Money › 🧾 Invoice design, Get paid online	Invoice look and online payments.	Not covered here.	Other writer.
Team › 👷 Crew, team & hours	Crew, permissions, working hours.	Not covered here.	Other writer.
Messages and connections › Messages & alerts, Reminders, Intake questions, Quick replies, Connected apps	Messaging and connections.	Not covered here.	Other writer.

Steps

1. Open the Hub and choose **Settings**.
2. Either tap a **group** and then a **tab**, or type a name in **Search settings** and tap the result.
3. The tab opens. If you searched, the matching setting scrolls into view and flashes.
4. Edit what you need, then press that tab’s own save button. Each tab saves by itself; there is no single Save for the whole Settings area.

Tips

- Searching is the fastest way to find something such as “Overhead (%)”.
- Tab names with an emoji are the same tabs, just with a symbol.
- Settings that change what you see (Show me & tools, Appearance) save as described on their own screens.

If something goes wrong

- **Search shows “No setting has that name.”** Try a different word, such as “markup” instead of “price”.
- **A tab is missing.** Your role or plan may hide it.
- **I cannot find a setting listed here.** Use the group buttons and open each tab; search covers listed settings only.

Settings → Follow-up plan: every field explained

Field-by-field guide to the default follow-up plan used every time you send a quote.

Where to find it: Contractor Hub → Settings & Integrations → Settings → group **Prices and quotes** → tab **Follow-up plan**. This is a contractor (owner) screen.

What it controls: the default set of follow-up messages VisionScaper schedules each time you send a quote. Dates are counted from the day you send the quote. The screen opens already filled with a six-message plan.

Before you start

- Email works with no extra setup.
- Texts only go out if the site owner has added Twilio. If not, the **Send by** list shows "Text (not set up)". See `get-twilio-details`.

The default plan (placeholder timings, not approved; set your own)

#	Day	Time	Send by	Subject
1	1	10:00	Email	Your {project_name} proposal from {company_name}
2	3	17:30	Text	(none)
3	7	10:00	Email	Picturing your new {project_name}
4	14	12:00	Text	(none)
5	21	10:00	Email	Want to adjust {project_name}?
6	30	10:00	Both	Should I close your file?

Fields (each follow-up has its own set)

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Follow-up N (checkbox)	Switches this one follow-up on or off. Off hides its other fields and leaves it out of the saved plan.	Untick to skip it.	On.
`Remove` (button)	Deletes this follow-up row from the plan on screen.	Click, then save.	Nothing is saved until you save the plan.
`Date`	Sets when this follow-up goes out. On save VisionScaper stores it as a number of days after the send day (counted from today's date on this screen).	Pick a date. Example: a week from today.	Day shown beside the title ("day 3").
`Time`	Time of day it goes out, in your local time.	10:00	See the table above.
`Send by`	Chooses Email, Text or Both for this message.	Pick one.	If texting is not set up, the Text and Both choices say "(not set up)".
`To`	Who gets it. In Settings the only choice is "Everyone I send it to", because no customer is chosen yet.	Leave as is.	Everyone I send it to.
`Subject`	The email subject line. Not used for a text-only message.	Example: Checking in about {project_name}	Filled from the plan.
`Message`	The body of the email or text. Shortcodes in curly braces are filled in per customer.	Keep one clear call to action.	Filled from the plan.
Attach: Proposal link	Adds the link where the customer views and signs the quote.	Tick it.	Ticked on messages 1, 2, 3, 4, 5, 6.
Attach: Before/after picture	Adds the design picture.	Tick it.	Ticked on message 3 only.
Attach: Total	Adds the quote total.	Tick it.	Ticked on messages 1 and 5.
Attach: What's included	Adds the scope list.	Tick it.	Ticked on message 3 only.
`+ Add follow-up`	Adds a new row 7 days after the last one at 10:00, by email, with a short "checking in" message and the proposal link attached.	Click, then edit it.	
`Save as my default plan`	Saves the whole plan to your settings (`followups`). It is then used for every quote you send.	Click once when happy.	The toast says "Saved."
`Reset to the recommended plan`	Clears your saved plan (saves an empty list) and redraws the screen with the recommended six-message plan.	Click if you want to start over.	It saves immediately.

Shortcodes (16 tap-to-insert buttons)

Tap a button and the code is typed into the box you last clicked. Codes are not case-sensitive. A code with no value is sent as-is, and you get a warning first.

Code	Meaning	Example
`{customer_name}`	Customer's full name	Jane Smith
`{customer_first_name}`	Customer's first name	Jane
`{customer_address}`	Property address	123 Example St, Farmington, CT
`{customer_town}`	Property town	Farmington
`{project_name}`	Quote or project title	Front Yard Renovation
`{quote_number}`	Quote number	Q-1042
`{quote_total}`	Total including tax	$8,450
`{deposit_amount}`	Deposit to get started	$2,535
`{quote_link}`	Link to view and sign the proposal	https://...
`{valid_until}`	Date the price is good until	June 30
`{company_name}`	Your business name	
`{contractor_name}`	Your name	
`{contractor_phone}`	Your phone	
`{contractor_email}`	Your email	
`{month}`	Current month	May
`{today}`	Today's date	May 6

The line under each message, "Preview:", shows the first 160 characters with sample details filled in.

Steps

1. Open Contractor Hub → Settings & Integrations → Settings, choose **Prices and quotes**, then the **Follow-up plan** tab.
2. Read each follow-up. Untick any you do not want.
3. Change **Date** and **Time** if the rhythm is wrong for you.
4. Choose **Send by** for each. Use text sparingly.
5. Edit **Subject** and **Message**. Click inside the box, then tap shortcodes to insert them.
6. Tick the **Attach** boxes you want.
7. Click **+ Add follow-up** if you need another.
8. Click **Save as my default plan** and wait for "Saved."

Tips

- One message, one call to action.
- When you send a quote you can still change that quote's follow-ups. This screen only sets the default.
- An outstanding subscription payment can hold follow-ups. See `settings-plan-usage-and-credits`.

If something goes wrong

- **Text says "(not set up)":** the site owner must add Twilio first.
- **Your changes vanished:** you did not click **Save as my default plan**.
- **After Reset the old plan still shows:** reload the tab. Whether the screen redraws from the saved list is not verified in code.
- **A message shows a literal {code}:** the code is misspelled or has no value for that customer.

Settings → Invoice design: look, sections and details

Field-by-field guide to the invoice logo, layout, colour, font, section order, columns and details toggles.

Where to find it: Contractor Hub → Settings & Integrations → Settings → group **Money** → tab 🧾 **Invoice design**. Owner screen.

What it controls: how every invoice looks to your customer. The page is split in two: the form on the left and a **Live preview (sample customer)** on the right. The preview refreshes about a third of a second after each change. Nothing is saved until you click **Save invoice design**. This article covers the first two cards, 🎨 **Look** and 📐 **Sections & order**. The content, tax, due date and reminder fields are in `settings-invoice-design-content-and-reminders`.

Before you start

- Have your logo file ready (any picture file the file picker accepts).
- Fill in your address, phone, email and website in Settings → Business profile. The "Details to show" switches use those details (what happens when one is empty is not verified in code).

Fields: 🎨 Look

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
🖼️ `Upload logo`	Opens the file picker. The picture is shrunk so its longest side is at most 600 pixels, turned into a PNG and held until you save.	Choose your logo file.	None. Saved logo is limited to 2 MB on the server.
`Use my profile logo` / `Remove logo`	If you have a logo in Business profile the link says "Use my profile logo" and switches back to it. If not it says "Remove logo" and clears the invoice logo.	Click to undo an upload.	
`Logo position`	Puts the logo Left, Center or Right in the header.	Click one chip.	Left
`Logo size`	Small, Medium or Large logo.	Click one chip.	Medium
`Layout`	Chooses the whole page style: Classic, Modern, Compact or Bold. (What each style looks like: check the preview.)	Click one chip and look at the preview.	Classic
`Brand color`	Colour used for headings and accents. Must be a six-digit colour.	Click the swatch and pick.	#1f7a46 (green)
`Font`	Typeface for the invoice. Options: System (fast, no download), Inter, Roboto, Lato, Montserrat, Open Sans, Merriweather (serif), Playfair Display (serif), Source Serif (serif), Roboto Mono.	Pick one. Choose System for the fastest page.	System
`Heading`	The big word at the top of the page (up to 40 characters).	Example: Invoice, or Statement.	Invoice
`License / registration line`	One line of text such as your licence number (up to 80 characters). Shown only when **License line** below is ticked.	Example: CT HIC #0654321 · Licensed & insured	Blank

Fields: 📐 Sections & order

"Tick what appears and use the arrows to move sections up or down the page." Each row has a checkbox and two buttons, ↑ (Move up) and ↓ (Move down). The first row cannot move up and the last cannot move down.

Section (checkbox)	What it shows	Default
Logo & your business	Logo, business name and contact details	On, first
Bill to	The customer's name and address	On
Invoice number & dates	Number, issue date and due date	On
Custom fields	Your own label/value lines (set in the next article)	On
Line items	The table of work and prices	On
Totals	Subtotal, discount, tax and total	On
How to pay	Your payment instructions	On
Notes	Your default notes	On
Terms	Your terms text	On
Thank-you message	A closing thank-you	Off
Footer	A small footer line	On

Line item columns

Five checkboxes decide which columns the Line items table has.

Checkbox	Column	Default
Date	Date of each line	Off
Qty	Quantity	On
Unit	Unit (such as sq ft)	Off
Rate	Price each	On
Amount	Line total	On

Details to show

Checkbox	Shows	Default
Your address	Your business address	On
Your phone	Your phone	On
Your email	Your email	On
Your website	Your website	On
License line	The License / registration line above	On
Customer phone	The customer's phone	Off
Customer email	The customer's email	Off
Service address	The address the work was done at	On
"PAID" stamp	A PAID mark on paid invoices	On

Steps

1. Open the 🧾 **Invoice design** tab.
2. Click 🖼️ **Upload logo** and choose the file. Watch the preview.
3. Set **Logo position**, **Logo size** and **Layout**.
4. Pick **Brand color** and **Font**, then edit **Heading** and **License / registration line**.
5. In **Sections & order**, untick what you do not need and use the arrows to reorder.
6. Choose the **Line item columns** and **Details to show**.
7. Continue to the content cards (next article), then click **Save invoice design**. A toast says "Invoice design saved."

Tips

- Unticking a section hides it but keeps what you typed.
- Text colour is not a setting. Only the brand colour is.

If something goes wrong

- **Preview stays blank:** the preview request failed quietly (the code treats it as optional). Change any field again, or reload the tab.
- **Logo will not save:** the file is over 2 MB after processing, or the file picker returned no image. Use a smaller picture.
- **Changes gone after leaving the tab:** you did not click **Save invoice design**.

Settings → Invoice design: default content and reminder plan

Field-by-field guide to invoice notes, payment text, tax, due days, custom fields and the default reminder plan.

Where to find it: Contractor Hub → Settings & Integrations → Settings → group **Money** → tab 🧾 **Invoice design**, scrolling to the cards 📝 **Default content** and ⏰ **Default reminder plan**. Owner screen.

What it controls: the words, tax, due date and automatic payment reminders that every new invoice starts with. You can still change them on an individual invoice. Look and layout are in `settings-invoice-design-look-and-layout`. Everything on both articles is saved by the single **Save invoice design** button at the bottom.

Before you start

- Texts in reminders only go if texting is set up and your plan includes it. See `set-up-twilio-texting`.
- If you take card payments, finish **Get paid online** first so the "View & pay" link works. See `settings-get-paid-online`.

Fields: 📝 Default content

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Custom fields: `Label (e.g. PO number)`	Names an extra line printed on every invoice (in the "Custom fields" section). A row with no label is dropped on save.	PO number	Up to 60 characters; up to 12 rows.
Custom fields: `Default value (optional)`	The value printed beside the label unless changed on the invoice.	Leave blank to fill in per invoice.	Up to 200 characters.
Custom fields: Remove (X button)	Removes that row.	Click, then save.	
`+ Add a field to every invoice`	Adds an empty label/value row.	Click.	
`Notes`	Default note text (the "Notes" section).	Thanks for letting us care for your yard this season.	Blank. Up to 2000 characters.
`How to pay`	Default payment instructions (the "How to pay" section).	Pay online with the button, or checks payable to Green Acres LLC.	Blank.
`Terms`	Default terms text (the "Terms" section).	Payment is due by the due date shown.	"Payment is due by the due date shown. Thank you for your business."
`Thank-you message`	Default closing line. Only shows if that section is ticked.	Thank you for choosing us!	"Thank you for choosing us!" (section is off by default)
`Footer`	Small line at the bottom.	Green Acres LLC · 1 Yard Rd · Licensed & insured	Blank.
`Default sales tax %`	Tax rate a new invoice starts with. Whole range 0 to 30; decimals allowed.	6.35	0
`Default due in (days)`	Days after the invoice date that payment is due. Range 0 to 120.	14	14

Fields: ⏰ Default reminder plan

"Sent automatically for every invoice that isn't paid yet, unless you choose a custom plan or none on the invoice. Reminders stop the moment it's paid." The list is sorted by timing. Up to 12 reminders are kept.

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Checkbox at the left of a reminder	Switches that reminder on or off.	Untick to pause it.	See defaults below.
`Days`	How many days before or after the due date. Hidden when the timing is "on the due date". 0 to 365.	3	
When (select)	`before due`, `on the due date` or `after due`.	Pick one.	Choosing "on the due date" sets days to 0.
Channel (select)	`email`, `text` or `email + text`.	Pick one.	Picking text without texting set up shows a message and the reminder goes by email only until texting works.
`Edit message`	Opens or closes the wording boxes.	Click.	Hidden at first.
`Email subject`	Subject of the reminder email (up to 200).	Reminder: invoice {invoice_number}	Shown for email and both.
`Email`	Body of the email (up to 4000).	See default wording on screen.	

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
`Text message`	Body of the text (up to 600). "Reply STOP to opt out" is added for you and texts never go out overnight.	Keep it short.	Counter shows characters used.
11 insert chips	Types a code into the box you last clicked: `{customer_first_name}` (First name), `{customer_name}` (Customer), `{invoice_number}` (Invoice #), `{invoice_title}` (Title), `{invoice_amount}` (Amount), `{invoice_due_date}` (Due date), `{days_late}` (Days late), `{days_until_due}` (Days until due), `{invoice_link}` (Pay link), `{company_name}` (Your company), `{contractor_name}` (Your name).	Tap to insert.	`{customer_first_name|there}` gives a fallback word.
`Send me a test`	Sends this reminder to you right now using the current text on screen.	Click while editing.	Toast says it was sent, or why not.
Remove reminder (X)	Deletes that reminder.	Click.	
`+ Add a reminder`	Adds an "after 10 days, by email" reminder.	Click, then edit.	

The starting reminders (placeholder timings, not approved; set your own)

When	Channel	On?
3 days before due	email	on
On the due date	email + text	on
3 days after due	text	on
7 days after due	email + text	on
14 days after due	email	on
30 days after due ("Final notice")	email	off

Steps

1. Scroll to 📝 **Default content**. Fill **How to pay**, **Terms** and **Footer**.
2. Add custom fields only if you really need them.
3. Set **Default sales tax %** and **Default due in (days)**.
4. In ⏰ **Default reminder plan**, tick the reminders you want and set each one's timing and channel.
5. Click **Edit message** on one reminder and press **Send me a test** to see it in your inbox.
6. Click **Save invoice design**.

Tips

- Separately, **Messages & alerts** has an "Invoice overdue nudge" message with its own timing (off by default). The two are set in different places; which one wins when both are on is not verified in code, so use one.
- Keep late-payment wording polite; the starting wording already is.

If something goes wrong

- **"Not sent" on a test:** the toast shows the reason, such as no email on your profile.
- **Texts not arriving:** see the Channel row above and `settings-get-paid-online`.
- **Tax shows 0:** the field was left at 0 or text was typed; type a number.

Settings → Get paid online: Stripe, Instant Payout and text messages

Field-by-field guide to the Stripe connection buttons, Instant Payout box and the text-messages status card.

Where to find it: Contractor Hub → Settings & Integrations → Settings → group **Money** → tab **Get paid online**. Owner screen.

What it controls: whether your customers can pay deposits and invoices online, and whether you can move your balance to your debit card early. It also shows whether text messages are switched on for your account. There are no typed fields on this tab. It has buttons, a read-only rates note and one amount box.

Before you start

- The website owner must have saved the Stripe keys first. If not, the card shows "Online payments aren't set up on this website yet." and nothing else works. See `get-stripe-keys`.
- You need your business and bank details ready for Stripe's own sign-up pages. Follow Stripe's current instructions on those pages.
- For texting, the website owner adds Twilio under Settings → VisionScaper. See `get-twilio-details`.

Card 1: Get paid online (Stripe)

Item (exact label)	What it does for VisionScaper	What to do	Default / notes
Rates note (read-only)	Explains that customers can pay by card, Apple Pay or Google Pay, and by bank account (ACH) when the site owner has switched ACH on. Money goes to your own Stripe account and reaches your bank in about 2 business days.	Read it. Nothing to type.	The card percentage, fixed amount and bank percentage come from the website owner's settings. Any default shown is a placeholder, not approved; the owner sets their own.
"Cards: X% + $Y per payment" line	Shows what you receive on a $1,000 invoice after the card fee.	Read only.	Worked example only.
"Bank (ACH): X% per payment" line	Same for bank payments. Says it clears in about 4 business days.	Read only.	Only shown when ACH is on.
"Instant Payouts: X%" line	Shows the fee for early payouts (money on your debit card in about 30 minutes).	Read only.	Only shown when Instant Payouts are on.
Status line	After you press the status button it reads "✅ Ready to take payments." or "⏳ Stripe still needs some details."	Read only.	If you are already ready, the green line appears when the tab opens.
`Connect with Stripe`	Starts Stripe's own sign-up for your company and sends your browser to Stripe.	Click and complete Stripe's pages.	The button changes by state.
`Finish Stripe setup`	Same button, shown when you started but are not finished.	Click to continue.	
`Update my Stripe details`	Same button, shown when you are ready. Lets you change details at Stripe.	Click only to edit.	
`Check status`	Asks Stripe if your account can take payments, updates the status line, and opens your Stripe dashboard in a new tab if one is available.	Click after you return from Stripe.	Shown after you have started.
`Open my Stripe account`	Same button once you are ready.	Click to see payouts at Stripe.	

Card 2: ⚡ Instant Payout

This card appears only once your Stripe account is ready and the website owner has switched Instant Payouts on.

Item (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
"Available instantly" figure (read-only)	The balance that can be sent instantly right now. If it is under $1, the card says nothing is available (and shows any amount on its way to your bank).	Read only.	
`Amount to pay out`	The amount to send to your debit card.	A number from 1.00 up to the available figure. Example: 250.00	Starts at the full available amount.
Fee line (read-only)	Shows the fee, at least $0.50, and what you will receive.	Read only.	Fee % comes from the website owner's settings; placeholder, not approved.
`⚡ Pay out instantly`	Takes the fee, then pays the rest to your debit card. If the payout fails, the fee is given back.	Click once.	Limit of 10 instant payouts per day. Stripe needs a debit card on your Stripe account.

Card 3: Text messages (read-only)

Item	What it does for VisionScaper	What to do	Default / notes
Status line	If texting is on, it reads "✅ Texting is on. Follow-ups and visit reminders can go by text; customer replies are logged and emailed to you." Otherwise it warns that texting is not set up and that email works.	Nothing to type here. Ask the website owner to add Twilio.	Texting counts as ready only when the Twilio account SID, auth token and a sending number (or messaging service) are all saved.

Steps

1. Open Settings → **Money** → **Get paid online**.
2. If you see the "aren't set up" warning, stop and tell the website owner.
3. Click **Connect with Stripe**. Complete Stripe's pages. Your browser returns to VisionScaper.
4. Reopen this tab and click **Check status**. Wait for the green "Ready" line.
5. Optional: when the Instant Payout card shows a balance, type an **Amount to pay out** and click ⚡ **Pay out instantly**.
6. Confirm the **Text messages** card says texting is on, if you want text reminders.

Tips

- Add a debit card inside your Stripe account before using Instant Payout.
- The invoice "How to pay" text and the pay button are separate. See `settings-invoice-design-content-and-reminders`.

If something goes wrong

- **"Connect Stripe first":** the payout needs a ready Stripe account.
- **"Instant Payouts aren't switched on on this website":** the website owner has not turned them on.
- **"That's a lot of instant payouts today":** you hit the daily limit of 10. Try tomorrow.
- **"That amount is too small for an instant payout":** the fee would be as large as the amount.
- **Stuck on "Stripe still needs some details":** click **Finish Stripe setup** and complete every step Stripe asks for.

Settings → Crew, team & hours: crew list, private notes and working hours

Field-by-field guide to adding crew members, the private notes box and your normal working day.

Where to find it: Contractor Hub → Settings & Integrations → Settings → group **Team** → tab 👷 **Crew, team & hours**. Owner screen. The permissions grid on the same tab has its own article, `settings-team-permissions`.

What it controls: who is on your team, which crew each person belongs to, their role, the private notes only you can read, and the start and end of your normal working day. The page text says: "Your field employees. They show up when you schedule visits, and crew sheets (address, map link, scope, notes) can be emailed or texted to them. You, the owner, don't count toward your plan."

Before you start

- Two usage bars sit at the top, **employees** and **crews**. They show how many you have against your plan. The numbers are your plan's (placeholders, not approved).
- To link a person to their own VisionScaper login, they need an account first. Remove them from this list later and their access ends.
- Availability, time off, internal cost rates and switching people off are on the Field work → Team screen, reached by the link on this tab, not here.

Fields: each crew member (the list repeats)

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
`Name`	Names the person on schedules and crew sheets. A row with no name is not saved.	Mike Rivera. Up to 80 characters.	Blank
`Email or mobile (for crew sheets)`	Where crew sheets (address, map link, scope, notes) are emailed or texted.	mike@example.com or (860) 555-0123	Blank. Texting needs Twilio.
`Crew (e.g. Crew A)`	Puts the person in a named crew. People with the same text are the same crew. The box suggests crew names already used.	Crew A	Blank
Remove (X button)	Takes the person off the list when you save. If they have history their name is kept for past records.	Click, then **Save crew**.	
Role (select)	👷 `Crew`, 🦺 `Crew leader` or 🧑‍💼 `Manager`. Decides which row of the permission grid applies.	Pick one.	Crew
`VisionScaper account email (optional)`	Links this person to your company through their own VisionScaper account. Remove them here and their access ends. An invalid email is ignored on save.	Their account email.	Blank. Placeholder reads "Their VisionScaper account email (optional)".
`+ Add crew member`	Adds an empty row with the Crew role.	Click.	
`Save crew`	Saves the whole list, including every private-notes box.	Click once when done.	Toast "Saved." Over-limit adds are refused.

Fields: 🔒 Private notes (a fold-out under each person)

The fold-out says: "Only you see this. Keep it factual (dates, what happened). It is never shown to the employee or shared with other contractors; references are only given with the employee's consent." A ✎ mark on the title means something is filled in.

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
`Role`	A job title for your own records. It is separate from the Role select above and changes no permissions.	Foreman	Blank
`Started`	A start date for your records.	Pick a date.	Blank
`Pay rate`	Free text for your own records.	$24/hr	Blank. It is text and is not used for pay calculations (effect not verified in code).
`Reliability`	A 1 to 5 rating: `5 · Excellent`, `4 · Good`, `3 · OK`, `2 · Needs work`, `1 · Poor`, or – for none.	Pick one.	None
`Quality of work`	Same scale.	Pick one.	None
`Safety`	Same scale.	Pick one.	None
`Notes`	Your factual notes.	3/14 trained on paver base; 5/2 late twice this week (traffic)	Blank

Fields: Working hours

"Your normal working day (default 7 AM to 5 PM). New job days start at the beginning of it, and the calendar shows how much of each day is free."

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
`Day starts`	The hour your day begins. New job days start here and the calendar measures free time from it.	Pick an hour.	7 AM
`Day ends`	The hour your day ends.	Pick an hour.	5 PM
`Save working hours`	Saves both. Refused with "The end of the day must be after the start." if the end is not later.	Click.	Toast "Saved."

Steps

1. Open Settings → **Team** → **Crew, team & hours**.
2. Click **+ Add crew member**. Fill **Name**, **Email or mobile**, **Crew** and **Role**.
3. If they have a VisionScaper login, enter it in **VisionScaper account email**.
4. Open 🔒 **Private notes** and add what you need. Only you see it.
5. Click **Save crew**. If your plan is full you will see a message and nothing new is added.
6. Scroll to **Working hours**. Choose **Day starts** and **Day ends**, then click **Save working hours**.

Tips

- Pick roles carefully; Managers get far more permissions by default. See `settings-team-permissions`.
- Keep notes about behaviour factual, with dates.

If something goes wrong

- **"Your plan includes N field employees…":** upgrade, or remove someone. People already on the list stay.
- **Person did not appear after save:** the name was empty.
- **Hours will not save:** end hour is not after start hour.

Settings → Crew, team & hours: team permissions grid

Every one of the 38 permission checkboxes for Manager, Crew leader and Crew, with defaults and what each allows.

Where to find it: Contractor Hub → Settings & Integrations → Settings → group **Team** → tab 👷 **Crew, team & hours**, card **Team permissions**. Owner screen.

What it controls: what each role may do. The card says: "You (the owner) can always do everything. Crew sheets never show prices, costs or margins." The grid has one row per right and three checkbox columns: **Manager**, **Leader** and **Crew**. The rights are enforced on the server, not just hidden on screen.

Before you start

- Add your people and set their roles first. See `settings-crew-list-private-notes-and-working-hours`.
- Defaults below come from the code. Treat them as a starting point you should review, not as approved policy.
- Some rights depend on your plan or on the website owner switching a feature on. The grid saves the right either way.

How the grid works

- Tick a box to allow that role. Untick to refuse.
- Each box's screen-reader name is "right label — role".
- A right you do not touch keeps its current value.
- Everyone can see the services list. This is fixed and has no checkbox.
- Allowing "Create & edit company templates" or "Set default templates" also lets that role use templates on jobs.
- Click **Save permissions** to save the whole grid at once. Toast "Saved."

Fields: the 38 rights

Column order in each row: **Manager / Leader / Crew** (1 = ticked by default, 0 = not ticked).

Field (exact label)	What it does for VisionScaper	Default M / L / C
Use templates on jobs	Lets the role apply service templates to jobs.	1 / 1 / 1
Create & edit company templates	Lets the role make and change your reusable service templates.	1 / 0 / 0
Set default templates	Lets the role choose which templates are the defaults.	1 / 0 / 0
See costs, markups & margins	Shows the money behind a service (costs, markups, margins).	1 / 0 / 0
See every job (not only their own)	Without it, people see only jobs assigned to them.	1 / 0 / 0
Assign people & reschedule	Lets the role put people on jobs and move jobs.	1 / 0 / 0
Manage employees & availability	Lets the role edit the team list and when people can work.	1 / 0 / 0
Review & approve hours worked	Lets the role approve timesheets.	1 / 0 / 0
Create checklists & field forms	Lets the role build checklists and field forms.	1 / 0 / 0
Approve jobs & override required items	Lets the role approve a job or finish it with required items missing.	1 / 0 / 0
See customer phone & email	Shows customer contact details to the role.	1 / 1 / 1
Share job photos with customers	Lets the role share job photos with the customer.	1 / 0 / 0
See labor rates, job costs, revenue & profit	Shows labour rates, job costs, revenue and profit.	0 / 0 / 0
Clock their crew in & out on shared jobs	Lets a leader or manager clock crew members in and out on shared jobs.	1 / 1 / 0
Phone app: see every customer	Lets the role see the whole customer list in the phone app.	1 / 0 / 0
Phone app: edit customers & properties	Lets the role change customers and properties in the phone app.	1 / 0 / 0
Phone app: add potential customers	Lets the role add new leads in the phone app.	1 / 1 / 1
Phone app: see private customer notes	Lets the role read private customer notes in the phone app.	1 / 0 / 0
Phone app: Door-to-door	Lets the role use the door-to-door (canvass) feature in the phone app.	1 / 1 / 0
Phone app: measure properties	Lets the role measure properties in the phone app.	1 / 1 / 0
Phone app: view & share landscape plans	Lets the role view and share landscape plans in the phone app.	1 / 1 / 0
Phone app: route planner	Lets the role use the route planner in the phone app.	1 / 1 / 0
Phone app: see quotes, invoices & payments (amounts)	Shows money amounts for quotes, invoices and payments in the phone app.	1 / 0 / 0
Phone app: start quote drafts & invoices	Lets the role start quote drafts and invoices in the phone app.	1 / 0 / 0
Phone app: send quotes & invoices	Lets the role send quotes and invoices from the phone app.	1 / 0 / 0
Phone app: record payments received	Lets the role record payments from the phone app.	1 / 0 / 0
Phone app: add expenses (need approval)	Lets the role add expenses; they need approval.	1 / 1 / 1
Phone app: approve or reject expenses	Lets the role approve or reject expenses.	1 / 0 / 0

Field (exact label)	What it does for VisionScaper	Default M / L / C
Phone app: see & assign everyone's tasks	Lets the role see and assign all tasks, not only their own.	1 / 0 / 0
Phone app: approve messages, follow-ups & review requests	Lets the role approve outgoing messages that wait for approval.	1 / 0 / 0
Export approved hours for payroll	Lets the role export approved hours.	0 / 0 / 0
Turn automatic payment on or off	Lets the role switch autopay on or off.	0 / 0 / 0
See live team location	Lets the role see where team members are now.	1 / 0 / 0
See location history & mileage	Lets the role see location history and mileage.	1 / 0 / 0
Create & approve purchase orders	Lets the role create and approve purchase orders.	1 / 0 / 0
Receive deliveries on purchase orders (no prices)	Lets the role mark deliveries received without seeing prices.	1 / 1 / 0
Run the first-run guide & sample data	Lets the role run the first-run guide and sample data.	0 / 0 / 0
Crew app: messages with the office	Lets the role message the office from the crew app.	1 / 1 / 1

The descriptions are the plain meaning of each label. The exact screens each right opens are not all traced in code.

The screen shows the server's current value for every right when it is available.

Steps

1. Make sure every person has the right role (Crew, Crew leader or Manager).
2. Open the **Team permissions** card.
3. Go down the grid. For each right decide who needs it. Prefer untick when unsure.
4. Keep money rights off for Crew: they see no prices anyway on crew sheets.
5. Click **Save permissions**.
6. Test by signing in as a team member (or ask them what they can see).

Tips

- Give "See labor rates, job costs, revenue & profit" and "Export approved hours for payroll" only to people you trust with pay data.
- If you add a role later, review the grid again.

If something goes wrong

- **A person cannot see a screen:** check the right, their role, and that their account email is entered on their crew row.
- **Changes did not stick:** you must click **Save permissions**; the crew **Save crew** button does not save the grid.

Settings → Messages & alerts: the message editor, field by field

How to edit any automatic message or alert: on/off, channels, subject, email, text, timing, quiet hours, test and reset.

Where to find it: Contractor Hub → Settings & Integrations → Settings → group **Messages and connections** → tab ✉️ **Messages & alerts**. Owner screen.

What it controls: every automatic message your customers get and every alert you get. Each one is pre-written. You open one, rewrite it, choose how it is sent, and save. The list of all 28 messages, with when each is sent and its starting channels, is in `settings-messages-and-alerts-catalog`.

Before you start

- Texts only send when the website owner has set up Twilio and your plan includes texting. Otherwise the page says "Texting isn't set up on this website yet, so text versions are saved but not sent" (or "Texts aren't in your plan..."). See `get-twilio-details`.
- The tab opens with a short tip: open a message to rewrite it, and tap a detail like "Customer's first name" to drop it in.

The list screen

Messages are grouped in cards: Requests, Appointments, Jobs & payments, Messages, 🔔 Alerts to you, Field operations, Purchasing. Each row shows the name, when it is sent, a small "Customized" tag if you changed it, and icons for its channels, or **Off**. Click a row to edit it. The Alerts card says: "How VisionScaper tells you about new requests, messages, signatures and payments. Texts to you follow your quiet hours." The Field operations card explains that alerts go to you and, if "Alert managers" is on in Field work → Settings, to your managers. "Schedule change" goes to the employee.

Fields: inside the editor (one pop-up per message)

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
"When it's sent" (read-only)	Plain description of what triggers this message. Some also post into your message thread with the customer.	Read only.	Different for each message.
`Send this message automatically` (or `Send me this alert` for alerts)	Master switch. Off means VisionScaper never sends it.	Untick to stop it.	On, except "Invoice overdue nudge", which starts off.
Send by: ✉️ `Email`	Sends by email.	Tick or untick.	Per message; see catalog.
Send by: 💬 `Text`	Sends by text. Labelled "(not sending)" when texting is not set up or not in your plan.	Tick or untick.	Per message.
Send by: 🔔 `In-app`	Shows it inside VisionScaper (the customer's project thread or your hub).	Tick or untick.	Per message.
`Email subject`	Subject line, up to 200 characters.	Example: How did we do on {job_name}?	Pre-written.
`Email (and in-app) message`	Body used for email and in-app, up to 6000 characters.	Write like you talk.	Pre-written.
`Text message (short version)`	Body for texts, up to 640 characters. Under it you see the length with sample details and about how many texts it will be. "Reply STOP to opt out" is added automatically.	Keep it short.	Pre-written.
`Find a detail`	A search box that filters the detail chips below it by name or code.	Type "date".	
Detail chips (55)	Tapping a chip types its `{code}` into the box you last clicked. Hover shows an example. The full list is in the catalog article.	Tap one.	Use `{customer_first_name|there}` to give a fallback word.
Preview (right side)	Shows subject, email and text with sample details. Unknown codes are shown in red.	Read only.	A warning "Not a detail VisionScaper knows: {x}" appears for a misspelled code.
`Send me a test`	Sends this draft to you with sample data, marked [TEST], by the channels ticked (not in-app).	Click.	Limit: 20 tests per hour.
`Reset to the original`	After you confirm, puts the wording back to the original and discards your edits for this message.	Click, then confirm.	
`Save`	Saves on/off, channels, subject, email and text for this message.	Click.	Toast "Saved."

Extra box: ⏱️ Timing (only for some messages)

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
`Days after the due date` (Invoice overdue nudge)	Days after an invoice's due date before the first nudge.	3	3

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
`Days after the job is marked done` (Review request)	Delay before asking for a review.	3	3
`Then every (days)` (Invoice overdue nudge)	Gap between nudges.	7	7
`At most (times)` (Invoice overdue nudge)	Maximum nudges per invoice.	3	3
`Save timing`	Saves these numbers. Each is kept between 0 and 365.	Click.	Toast "Timing saved."

Timing defaults are placeholders, not approved; set your own.

For **Appointment reminder** the editor shows a pointer instead: "When reminders go out is set in Settings → Reminders", with an **Open Reminders** link. See `settings-reminders`.

Extra box: 🌙 Quiet hours for texts to you (alerts that use text)

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
`No texts from`	The hour your quiet time starts. Texts to you wait.	Pick an hour.	9 PM
`to`	The hour it ends.	Pick an hour.	8 AM
`Save quiet hours`	Saves both.	Click.	Toast "Quiet hours saved."

Steps

1. Open the tab and click the message you want.
2. Decide on/off and tick the channels.
3. Edit subject, email and text. Tap detail chips instead of typing names.
4. Look at the preview. Fix any red code.
5. Click **Send me a test** and read it in your inbox or phone.
6. Click **Save**.
7. If it has Timing or Quiet hours, set those and use their own save buttons.

Tips

- Texts over 160 plain characters become several texts. The counter tells you.
- Text with special characters (such as emoji) counts a smaller number of characters per text. The on-screen counter accounts for this.
- Reset is per message; nothing else changes.

If something goes wrong

- **"Not sent" on test:** the toast shows the reason. Check your email and phone in Business profile.
- **"That's a lot of tests":** wait an hour.
- **Plan message after Save:** a channel or feature is not in your plan. See `settings-plan-usage-and-credits`.
- **A detail comes out blank:** the customer has no value for it. Add a fallback with `|`.

Settings → Messages & alerts: every message and every detail code

The full catalog of 28 automatic messages and alerts with trigger, starting channels, and all 55 detail codes.

Where to find it: Contractor Hub → Settings & Integrations → Settings → group **Messages and connections** → tab ✉️ **Messages & alerts**. Owner screen.

What it controls: this article lists each row on that tab so you know what exists. Each row opens the editor described in `settings-messages-and-alerts-editor`. Every row has the same fields there: on/off, Send by, Email subject, Email (and in-app) message, Text message, Save, Send me a test and Reset to the original.

Before you start

- Starting channels and the on/off state below are the code's defaults. Your own saved changes override them.
- Rows under "Alerts to you" and "Field operations" are for you or your staff. The rest go to customers.

The 28 messages

Group	Row (exact label)	Key	Who gets it	When it is sent	Starting channels	Starts
Requests	Request received (auto-reply)	`request_received`	Customer	Right after a homeowner sends you a quote request. Posted in your message thread with them and emailed.	Email, In-app	On
Requests	Ask for missing details	`missing_info`	Customer	When you tap “Ask for what’s missing” on a request. The list of missing items is filled in for you.	Email, In-app	On
Appointments	Appointment booked	`appt_booked`	Customer	When you add an appointment for a customer (and “Tell the customer” is on). It also goes on their VisionScaper calendar automatically.	Email, Text, In-app	On
Appointments	Appointment changed	`appt_changed`	Customer	When you move an appointment to a different day or time.	Email, Text, In-app	On
Appointments	Appointment cancelled	`appt_cancelled`	Customer	When you cancel or delete an upcoming appointment.	Email, Text, In-app	On
Appointments	Appointment reminder	`appt_reminder`	Customer	Sent on your reminder schedule (Settings → Reminders): as many reminders as you like, each so many minutes, hours or days before.	Email, Text	On
Appointments	On our way	`on_the_way`	Customer	When you or your crew tap “On our way” on an appointment.	Text, In-app	On
Jobs & payments	Job complete	`job_complete`	Customer	When you mark a job Done.	Email, In-app	On
Jobs & payments	Invoice sent	`invoice_sent`	Customer	When you send an invoice, and when a recurring invoice goes out. Includes a View & pay button.	Email, In-app	On
Jobs & payments	Invoice overdue nudge	`invoice_overdue`	Customer	Automatically after an invoice passes its due date, on the timing below.	Email	Off
Jobs & payments	Payment received (receipt)	`payment_received`	Customer	When a customer pays an invoice online.	Email, In-app	On
Jobs & payments	Review request	`review_request`	Customer	Automatically after a job is marked Done, on the delay below. Never sent if the job was cancelled.	Email, In-app	On
Messages	New message alert (to customer)	`new_message`	Customer	When you message a customer and they haven’t read it yet. At most one email per conversation every 15 minutes.	Email	On
Alerts to you	New quote request	`alert_new_request`	You	When a homeowner sends you a request.	Email, Text, In-app	On
Alerts to you	New message from a customer	`alert_new_message`	You	When a customer messages you. At most one email per conversation every 15 minutes.	Email, In-app	On
Alerts to you	Proposal viewed	`alert_quote_viewed`	You	The first time a customer opens a proposal you sent.	Email, In-app	On
Alerts to you	Proposal signed	`alert_quote_signed`	You	When a customer signs a proposal.	Email, Text, In-app	On
Alerts to you	Payment received	`alert_payment`	You	When a customer pays an invoice online.	Email, In-app	On
Alerts to you	Customer confirmed / asked to reschedule	`alert_appt_response`	You	When a customer confirms an appointment or asks for a different time.	Email, Text, In-app	On
Alerts to you	Your appointment reminder	`alert_appt_reminder`	You	Reminders to you (and your crew) on your own reminder schedule.	In-app, Email	On
Field operations	Job completed	`ops_job_done`	You	When your crew finishes a job in My work (also goes to managers when “alert managers” is on).	In-app	On
Field operations	Job blocked, waiting for approval, or missed	`ops_job_attention`	You	When a job is blocked or sent for approval, and when someone forgets to clock out.	Email, In-app	On

Group	Row (exact label)	Key	Who gets it	When it is sent	Starting channels	Starts
	clock-out					
Field operations	Job running late	`ops_job_overdue`	You	When an assigned job hasn't started by its start time (plus the grace minutes in Field Ops → Settings). Once per job.	Email, In-app	On
Field operations	Timesheet submitted	`ops_timesheet`	You	When an employee sends their week for approval (to people who can approve time).	In-app	On
Field operations	Job finished with missing documentation	`ops_missing_docs`	You	When a job is finished with required checklist items or photos missing (override with a reason).	Email, In-app	On
Field operations	Job over its labor budget	`ops_cost_over`	You	Once per job, when recorded labor passes the estimate by more than your threshold (Field Ops → Settings).	Email, In-app	On
Purchasing	Purchase order (to your vendor)	`po_send`	Your vendor	When you send a purchase order to a vendor by email. It lists what you are ordering and your prices. It never includes a customer name, address, email or the job price.	Email	On
Field operations	Schedule change (to your employee)	`ops_crew_schedule`	Your employee	To an employee when they are added to or taken off a job, or its time changes. Goes to their VisionScaper account (or their crew-sheet email / mobile).	Email, In-app	On

Rows with an extra timing box: **Invoice overdue nudge** and **Review request**. **Appointment reminder** and **Your appointment reminder** follow the Reminders tab. See `settings-reminders`.

The 55 detail codes

Tap a chip in the editor or type the code in curly braces. Codes are not case-sensitive. Double braces also work. Add a fallback after a bar, for example `{customer_first_name|there}`. Sending removes empty codes; the preview shows them.

Group	Chip label	Code	Example
Customer	Customer's full name	`{customer_name}`	Jane Smith
Customer	Customer's first name	`{customer_first_name}`	Jane
Customer	Customer's last name	`{customer_last_name}`	Smith
Customer	Customer's email	`{customer_email}`	jane@example.com
Customer	Customer's phone	`{customer_phone}`	(860) 555-0101
Customer	Customer's address	`{customer_address}`	12 Maple Ave, Farmington, CT
Customer	Customer's town	`{customer_town}`	Farmington
Customer	Job / property address	`{property_address}`	12 Maple Ave, Farmington, CT
Job	Job / project name	`{job_name}`	Front Yard Renovation
Job	Services they asked for	`{services_requested}`	Planting, Mulch & stone
Job	Their budget	`{budget}`	$5,000 – $10,000
Job	When they want it done	`{timing}`	Within a month
Job	How complete their request is (%)	`{brief_score}`	86
Job	What's missing from their request	`{missing_items}`	• A photo of the backyard
Quote	Quote number	`{quote_number}`	Q-1042
Quote	Quote total	`{quote_total}`	$8,450
Quote	Deposit amount	`{deposit_amount}`	$2,535
Quote	Link to view & sign the proposal	`{quote_link}`	https://…
Quote	Quote good until	`{valid_until}`	June 30
Appointment	Appointment type	`{appointment_type}`	Site visit
Appointment	Appointment title	`{appointment_title}`	Front yard – site visit
Appointment	Appointment date	`{appointment_date}`	May 14
Appointment	Day of the week	`{appointment_day}`	Tuesday
Appointment	Start time	`{appointment_time}`	9:00 am
Appointment	End time	`{appointment_end_time}`	10:00 am
Appointment	How soon (tomorrow, in 2 hours…)	`{appointment_when}`	tomorrow
Appointment	Where	`{appointment_location}`	12 Maple Ave, Farmington, CT
Appointment	Crew	`{crew_names}`	Mike and Luis
Appointment	Map / directions link	`{map_link}`	https://maps.google.com/?q=…
Appointment	Add-to-calendar link	`{calendar_link}`	https://…
Appointment	confirmed / asked to reschedule	`{customer_response}`	confirmed
Appointment	Customer's note	`{customer_note}`	Thursday afternoon works better.
Invoice	Invoice number	`{invoice_number}`	INV-1007

Group	Chip label	Code	Example
Invoice	Invoice title	`{invoice_title}`	Front Yard Renovation – Deposit
Invoice	Invoice amount	`{invoice_amount}`	$2,535.00
Invoice	Invoice due date	`{invoice_due_date}`	May 21
Invoice	Link to view & pay	`{invoice_link}`	https://…
Invoice	Amount paid	`{amount_paid}`	$2,535.00
Links	Link to leave a review	`{review_link}`	https://…
Links	Link to their VisionScaper project	`{portal_link}`	https://…
Message	Who sent the message	`{sender_name}`	Jane Smith
Message	The message (first 160 characters)	`{message_preview}`	Can you come Thursday instead?
Field operations	Employee	`{employee_name}`	Mike Rivera
Field operations	Job status	`{job_status}`	Blocked
Field operations	What happened	`{ops_detail}`	Gate locked — customer not home.
Field operations	Timesheet week	`{week_of}`	May 11
Field operations	Hours	`{hours}`	38.5
You	Your business name	`{company_name}`	Green Thumb Landscaping
You	Your name	`{contractor_name}`	Bob Green
You	Your phone	`{contractor_phone}`	(860) 555-0199
You	Your email	`{contractor_email}`	bob@example.com
You	Your website	`{contractor_website}`	greenthumb.example
Dates	Today’s date	`{today}`	May 12
Dates	This month	`{month}`	May
Dates	This year	`{year}`	2026

Steps

1. Find the row you want in the table.
2. Open it on the tab and follow `settings-messages-and-alerts-editor`.
3. Insert codes only from the list above. Anything else is flagged as "Not a detail VisionScaper knows".

Tips

- Turn off a customer message only if you will tell customers another way.
- A code only has a value when that message has the information. Check the preview.
- Purchase orders to vendors never include a customer name, address, email or the job name.

If something goes wrong

- **A code shows in red in the preview:** it is misspelled or not in the list.
- **A detail is blank in a real message:** the information was missing for that customer. Add a fallback.
- **You cannot find a message:** the list is fixed; you cannot add new messages here.

Settings → Reminders: every field explained

Field-by-field guide to appointment reminders for customers and for you, the notify switch, and your calendar link.

Where to find it: Contractor Hub → Settings & Integrations → Settings → group **Messages and connections** → tab ⏰ **Reminders**. Owner screen.

What it controls: how many reminders go out before each appointment, how long before, and by which channel. It also controls whether customers are told automatically when you book, move or cancel an appointment, and gives you a private link to show your schedule in your own calendar app. The words of each reminder are written in Messages & alerts (Appointment reminder).

Before you start

- A usage bar at the top shows how many reminder rules your plan allows (placeholder numbers, not approved). If you are at the limit, the **+ Add a reminder** button is replaced by "Your plan includes N reminder(s) per appointment."
- Texts need Twilio and a plan that includes texting. The Text box then says "Text (not on your plan / not set up)" and is greyed unless already ticked. See `get-twilio-details`.
- Texts never go out between 9 pm and 8 am. A reminder that would land overnight is sent at 8 pm the evening before.

Fields: Reminders to your customers (repeats)

Each reminder is a card titled "⏰ Reminder 1", "⏰ Reminder 2" and so on.

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
How long before (number)	How long before the appointment the reminder goes. It is saved as minutes. The smallest total is 5 minutes.	1	Starting rules below.
Unit (select)	`minutes`, `hours` or `days`.	days	
`Email`	Sends this reminder by email.	Tick or untick.	See below.
`Text`	Sends it by text.	Tick or untick.	
`In-app`	Shows it in the customer's VisionScaper.	Tick or untick.	
`All appointment types` / `Only some appointment types`	Fold-out with 10 checkboxes: Consultation, Site visit, Estimate walk-through, Job day, Maintenance visit, Follow-up visit, Meeting, Door-to-door, Time off / blocked, Appointment. Leaving all ticked means every type. Unticking some makes the reminder apply only to the ticked ones.	Untick types you do not want.	All types.
Summary line (read-only)	Describes the rule, such as "1 day before · email + text".	Read only.	
`Remove`	Deletes this reminder.	Click, then save.	
`+ Add a reminder`	Adds one: 1 day before, by email, all types.	Click, then edit.	

A reminder with no channel ticked is dropped on save.

Starting customer schedule (placeholder timings, not approved; set your own)

#	Before	Channels	Types
1	2 days	Email	All
2	1 day	Email + Text	All
3	2 hours	Text	Consultation, Site visit, Estimate walk-through

Fields: Reminders to you (repeats)

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
How long before (number) and Unit	Same as above, for reminders sent to you.	60 minutes	One rule: 60 minutes before.
`Email` / `Text` / `In-app`	Channel for your own reminder.		In-app
`Remove`	Deletes it.		
`+ Add a reminder for me`	Adds a rule 60 minutes before, in-app.	Click.	Up to 10 rules for you are kept.

There is no appointment-type filter for your own reminders.

Field: When you book, move or cancel

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
`Tell the customer automatically (their calendar updates either way)`	When on, booking, moving or cancelling an appointment sends the customer your "Appointment booked / changed / cancelled" message. Their VisionScaper calendar updates whatever you choose. You can switch it off for a single appointment when you book it.	Tick or untick.	On

Button: Save reminder schedule

Saves both lists and the switch. It then re-plans the reminders for every upcoming appointment that is not cancelled or done (up to 500). A toast tells you how many reminders were planned.

Section: Your schedule in your own calendar

Item (exact label)	What it does for VisionScaper	What to do	Default / notes
`🔄 Update from calendar (Google / Apple / Outlook)`	Opens a window with your private calendar link. If your plan does not include the calendar feed, a lock note shows instead.	Click.	
`🍎 Apple Calendar / Outlook`	Adds your schedule to Apple Calendar or Outlook using a calendar address.	Click.	
`Google Calendar`	Opens Google Calendar to add the link.	Click.	New tab.
"Or copy this private link..." (read-only box)	The raw calendar address for any calendar app ("Subscribe" or "From URL").	Click it to select.	
`Copy link`	Copies the address.	Click.	Toast "Copied."
`Make a new private link`	After you confirm, makes a new link. The old link stops working.	Click if the link was shared by mistake.	Re-subscribe with the new one.

Anyone with the link can see your appointment times.

Steps

1. Open Settings → **Messages and connections** → ⏰ **Reminders**.
2. Review each customer reminder. Change the number, unit and channels.
3. Narrow a reminder to certain appointment types if needed.
4. Add or remove reminders. Do the same under "Reminders to you".
5. Decide on **Tell the customer automatically**.
6. Click **Save reminder schedule** and read the toast.
7. To read your schedule in another calendar, use the calendar section.

Tips

- Send yourself a test of the wording first (Messages & alerts → Appointment reminder → Send me a test).
- Open Messages & alerts → **Appointment reminder** to rewrite what each reminder says.

If something goes wrong

- **Plan message when saving:** you have more customer reminders than your plan allows. Remove some or upgrade.
- **No texts sent:** texting is not set up, or the time fell in the overnight window.
- **Calendar app shows nothing:** make a new link and subscribe again.

Settings → Intake questions: every field explained

Field-by-field guide to adding your own questions to the homeowner request form, per service.

Where to find it: Contractor Hub → Settings & Integrations → Settings → group **Messages and connections** → tab ❓ **Intake questions**. Owner screen.

What it controls: your own questions that a homeowner answers before sending you a request. The screen says: "Your own questions in the homeowner's request form, so you never have to call back to ask them." Answers appear in the request brief in your Inbox. The page opens with the tip: "Add the questions you always end up asking on the phone. Homeowners answer them before they send the request — so you can price it the first time."

Before you start

- Custom intake questions are a plan feature. If your plan does not include them, the screen shows a lock note with the plan that does, and nothing can be edited. See `settings-plan-usage-and-credits`.
- The service chips come from the server (your services and VisionScaper's own service names). Exactly which services appear was not traced in code.

Fields

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Service chips	One chip per service, plus **Every request** first. A small number on a chip shows how many of your questions it holds. Picking a chip chooses which list you are editing.	Click a chip.	The first service is selected.
Info box "VisionScaper already asks N questions for ..."	Read-only list of the questions VisionScaper already asks for that service, with their choices. Shown only if there are any.	Read it so you do not duplicate.	Fixed list.
`Question text` (shown as Q1, Q2, ...)	The question the homeowner sees. Questions with no text are dropped on save.	Is there a dog in the yard during work hours? Up to 200 characters.	Blank
Question type (select)	The kind of answer: `Short answer` (text), `Long answer`, `Pick one`, `Pick any`, `Yes / No`, `Number`, `Date`.	Pick one.	New questions start as Pick one.
`Choices, separated by commas`	The answer options. Shown only for Pick one and Pick any. Each choice is kept to 80 characters.	Yes, No, Not sure	New questions start with "Yes, No".
`Why you ask (optional — people answer more when they know why)`	A short reason shown with the question.	So we can plan around the dog. Up to 200 characters.	Blank
Remove question (trash button)	Removes that question from the list on screen.	Click, then save.	
`+ Add a question`	Adds an empty question to the selected chip.	Click.	
`Save my questions`	Saves all chips' questions together. A service can keep up to 25 questions. The toast says how many were saved.	Click once.	"Saved N question(s)."

For **Every request**, the note reads: "These are asked on every request you receive, whatever the service." For a service it reads: "Your own questions, asked whenever a homeowner picks and sends the request to you."

A question can be marked required in the saved data, but this screen has no checkbox for it (required stays off for questions made here).

Steps

1. Open ❓ **Intake questions**.
2. Click **Every request** or one service chip.
3. Read what VisionScaper already asks, so you do not repeat it.
4. Click **+ Add a question** and type it.
5. Choose the type. For choices, type them with commas.
6. Add a "why" if the question might feel nosy.
7. Repeat for other chips, then click **Save my questions**.
8. Open your request form as a test customer to see the questions. See `settings-connected-apps-request-form`.

Tips

- Ask only what changes your price or your plan for the day.
- Use Yes / No or Pick one so answers are easy to compare.
- Keep each list short. The server keeps at most 25 per service.

If something goes wrong

- **You see a lock note:** your plan does not include custom intake questions.
- **A question vanished:** it had no text.
- **Changes lost:** switching chips keeps your edits on screen, but they are saved only when you click **Save my questions**.
- **Plan prompt on save:** upgrade, or contact the website owner.

Settings → Quick replies: every field explained

Field-by-field guide to saving one-tap answers you reuse in any conversation.

Where to find it: Contractor Hub → Settings & Integrations → Settings → group **Messages and connections** → tab ⚡ **Quick replies**. Owner screen.

What it controls: a list of answers you send often. Page text: "In any conversation, tap ⚡ to drop one in. {customer_first_name} fills in automatically." The purpose line reads: "Answers you send often, ready to drop into any conversation in one tap."

Before you start

- The number of replies you can keep is a plan limit. A usage bar shows it when your plan has a limit (placeholder numbers, not approved). If the feature is not in your plan, a lock note shows. See `settings-plan-usage-and-credits`.

Fields

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Reply box (one per reply, no label)	The text of one saved reply. It is offered when you tap ⚡ in a conversation. Up to 1000 characters per reply.	Hi {customer_first_name}, thanks for the details! I can come out on Thursday between 9 and 11. Does that work?	If you have none yet, two samples are filled in: one offering a site visit with [day] and [time] to replace, and one promising a quote within two business days.
Remove (trash button)	Takes that reply off the list on screen.	Click, then save.	
`+ Add a quick reply`	Adds an empty reply box.	Click and type.	
`Save quick replies`	Saves the list. Empty boxes are dropped. If you are over your plan's limit you get a plan message and nothing is saved.	Click once.	Toast "Saved."

The one detail code mentioned on this screen is `{customer_first_name}`. Whether other codes work in quick replies is not stated on this screen (not verified in code).

Square-bracket words such as [day] are only placeholders for you to overwrite by hand; VisionScaper does not fill them in.

Steps

1. Open Settings → **Messages and connections** → ⚡ **Quick replies**.
2. Edit the two sample replies, or delete them.
3. Click **+ Add a quick reply** and type each one you use often.
4. Use `{customer_first_name}` where you would write the person's name.
5. Click **Save quick replies**.
6. Open an Inbox conversation and tap ⚡ to check your replies are there.

Tips

- Keep each reply under about two sentences.
- Use square brackets for the bits you must fill in each time, and remember to change them before sending.

If something goes wrong

- **"Your plan includes N saved quick replies":** remove some or upgrade.
- **Reply missing after saving:** the box was empty.
- **Name did not fill in:** how the fill-in works was not traced in code, so check the Inbox article `quick-replies`.

Settings → Connected apps: overview and Google Contacts

Field-by-field guide to the Google Contacts card on the Connected apps tab, from keys to sync buttons.

Where to find it: Contractor Hub → Settings & Integrations → Settings → group **Messages and connections** → tab 🔌 **Connected apps**. Owner screen.

What it controls: how customers move between VisionScaper and other apps. The page says: "Bring customers in and out of VisionScaper. Your keys are stored encrypted and never shown again. CSV and vCard files work without any setup — use ⇅ Import / Export on the Customers page."

The tab holds several cards: **Google Contacts**, **QuickBooks Online**, a QuickBooks money-sync card (only once QuickBooks is connected), **Xero** and **Request form for your website**. This article covers the page as a whole and Google Contacts. The others have their own articles: `settings-connected-apps-quickbooks`, `settings-connected-apps-xero`, `settings-connected-apps-request-form`.

Before you start

- You need a Google account and a Google Cloud project. The card's own "Set-up walkthrough" lists four steps. Follow Google's current instructions on Google's screens, and use the key guide `get-google-sign-in-keys` if you already created a project for sign-in.
- The card says: "Not set up yet — 4 steps, about 10 minutes." until you have saved a Client ID and secret.
- The sync is about customer contact details (name, company, email, phone, address, town, state, ZIP are the fields compared in the review window).

The set-up walkthrough (fold-out on the card)

1. Open Google Cloud's People API page and click Enable (use the project you already have for sign-in, or a new one).
2. Under APIs & Services, OAuth consent screen: User type External, add your email, then add the scope ending `/auth/contacts`. Set Publishing status to In production, or Google disconnects you every 7 days.
3. Credentials → Create credentials → OAuth client ID → Web application. Under Authorized redirect URIs add the address in the **Redirect address** box on the card (it has a **Copy** button).
4. Paste the Client ID and Client secret into VisionScaper, Save, then Connect. Google may warn the app is not verified: click Advanced → Continue (it is your own app).

Fields: Google Contacts

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Redirect address (read-only box + `Copy`)	The address Google sends you back to after you approve. You paste it into Google's OAuth client.	Click **Copy**.	Shown inside the walkthrough.
`Client ID`	Identifies your Google app.	Ends in `apps.googleusercontent.com`.	Blank
`Client secret`	The password for your Google app. Stored encrypted and never shown again. Leave blank to keep the saved one.	Paste from Google.	Placeholder reads "•••••••• (saved — leave blank to keep)" once saved.
`How data moves`	Direction of changes: `Import only (into VisionScaper)`, `Export only (from VisionScaper)` or `Both ways (changes go each direction)`.	Pick one.	Both ways
`Only import contacts with this Google label`	Limits imports to contacts that carry this label in Google. "Keeps family and friends out of your CRM." Blank imports everyone. Up to 80 characters.	Clients	Blank
`Update automatically every hour`	Runs a sync every hour in the background.	Tick or untick.	Off
`Pass on deletions (when a contact is deleted on one side, remove it on the other) — off is safer`	Lets deletions travel in both directions. Off means deletions are not copied.	Leave off unless sure.	Off
`Save settings`	Saves the fields above. The page redraws.	Click.	Toast "Saved."
`Connect Google Contacts` / `Reconnect`	Sends you to Google to approve. Disabled until a Client ID and secret are saved.	Click after saving.	Says Reconnect when already connected.
`Disconnect`	After you confirm, revokes access and deletes the saved keys. Customers stay in both places.	Click if you want out.	Shown only when connected.

Exported customers go into a "VisionScaper Customers" label in Google Contacts.

Buttons after connecting

Button (exact label)	What it does for VisionScaper	Notes
`🔄 Update now`	Syncs in the direction set by "How data moves". Toast shows a summary.	
`⬇️ Import only`	Brings changes in from Google.	Hidden when mode is Export only.
`⬆️ Export only`	Sends changes to Google.	Hidden when mode is Import only.
`⚠️ N need review`	Opens a window listing customers changed in both places since the last update. Nothing is overwritten until you choose.	Shown when something needs review.

In the review window, for each customer: a small table shows the field, VisionScaper's value and Google Contacts' value. Buttons: `Keep VisionScaper's`, `Keep Google Contacts'`, `Decide later`. The choice is copied across on the next update.

The status line reads "✅ Connected … Mode: … Last updated: …" and shows the last error if there was one. If Google's permission expires, a warning says to tap **Reconnect**.

Steps

1. Open 🔌 **Connected apps**.
2. Open the walkthrough on the **Google Contacts** card and complete it at Google.
3. Paste **Client ID** and **Client secret**. Choose **How data moves** and, if wanted, the Google label.
4. Click **Save settings**.
5. Click **Connect Google Contacts** and approve in Google.
6. Back in VisionScaper, click 🔄 **Update now**. Read the toast.
7. Tick **Update automatically every hour** only after a successful first update, then save again.

Tips

- Check the first sync result before switching on automatic hourly updates.
- Leave "Pass on deletions" off until you trust the sync.

If something goes wrong

- **Connect button is greyed:** save a Client ID and secret first.
- **Disconnected after a week:** the Google consent screen is still in Testing. Set it to In production.
- **Customers in review:** open the review window and pick a version.
- **Error text on the card:** it is Google's message. Fix at Google and press Update now.

Settings → Connected apps: QuickBooks Online and Send to QuickBooks

Field-by-field guide to the QuickBooks Online card, the Security key, and the Send to QuickBooks money-sync card.

Where to find it: Contractor Hub → Settings & Integrations → Settings → group **Messages and connections** → tab 🔌 **Connected apps**. Cards: **QuickBooks Online**, then (once connected) **Send to QuickBooks: invoices, payments and expenses**. Owner screen.

What it controls: first, a connection that syncs customers with QuickBooks Online. Second, an optional feed that sends your invoices, payments and approved expenses to QuickBooks. QuickBooks Desktop is not supported; use CSV import/export instead.

Before you start

- You need a QuickBooks Online company and an Intuit developer app. See `get-quickbooks-keys`, and follow Intuit's current instructions on Intuit's screens.
- The card's walkthrough says: sign in at developer.intuit.com with your QuickBooks login, Create an app (QuickBooks Online and Payments, scope `com.intuit.quickbooks.accounting`). For Production keys, finish Intuit's short app questionnaire. Under Redirect URIs add the address shown in the card. For instant updates add the webhook address (with the Customer entity) and paste the key Intuit shows into **Security key**. Then paste the Client ID and Client Secret, choose Production or Sandbox, Save, Connect and pick your company.

Fields: QuickBooks Online card

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Redirect address (read-only + `Copy`)	The address Intuit sends you back to. Paste it into Intuit's Redirect URIs.	Click **Copy**.	In the walkthrough.
Webhook address (read-only + `Copy`)	Where QuickBooks tells VisionScaper that something changed (the "Automatic updates" address).	Paste into Intuit's Webhooks, Customer entity.	In the walkthrough. Optional.
`Client ID`	Identifies your Intuit app.	Starts like `AB…`.	Blank
`Client secret`	The app's password. Stored encrypted, never shown again. Leave blank to keep.	Paste from Intuit.	"•••••••• (saved — leave blank to keep)" once saved.
`How data moves`	`Import only (into VisionScaper)`, `Export only (from VisionScaper)` or `Both ways (changes go each direction)`.	Pick one.	Both ways
`QuickBooks company`	Which QuickBooks to talk to: `Production (my real company)` or `Sandbox (testing)`. You cannot switch while connected: disconnect first.	Production for real work.	Production
`Security key`	The secret that proves a message really came from QuickBooks (the old name is "verifier token"). Optional. Stored encrypted.	Paste the key Intuit shows for your webhook.	Blank. Placeholder "•••••••• (saved)" once saved.
`Update automatically every hour`	Runs the customer sync every hour.	Tick or untick.	Off
`Pass on deletions (when a contact is deleted on one side, remove it on the other) — off is safer`	Lets deletions travel across.	Leave off if unsure.	Off
`Save settings`	Saves the fields.	Click.	Toast "Saved."
`Connect QuickBooks Online` / `Reconnect`	Sends you to Intuit to pick your company. Greyed until a Client ID and secret are saved.	Click.	
`Disconnect`	After you confirm, revokes access and deletes the saved keys. Customers stay in both places.	Click to leave.	Only when connected.

The same sync buttons as Google appear once connected: 🔄 `Update now`, ⬇️ `Import only`, ⬆️ `Export only`, and ⚠️ `N need review` with `Keep VisionScaper's`, `Keep QuickBooks Online's`, `Decide later`. The card also says: "Customers only for now (invoices and payments later)." The money feed below is the part that sends invoices and payments.

Fields: Send to QuickBooks card (appears only when connected)

Text on the card: it "sends your invoices and the payments you record to QuickBooks, and can send approved expenses. Nothing is ever deleted in QuickBooks (a cancelled invoice is voided). Invoices and payments from before you turn this on are not imported. Both switches are off until you turn them on." Each switch saves as soon as you click it.

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
`Send invoices and payments to QuickBooks`	Main switch for the money feed. Disabled if QuickBooks is not connected.	Tick to turn on.	Off. Toast: "Turned on. Open invoices

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
`(hourly and when something changes)`			are sent on the next run."
`Also send approved expenses (only ones approved after you turn this on)`	Adds expenses to the feed. Disabled unless the main switch is on.	Tick to turn on.	Off. Toast: "Expenses will be sent from now on."
`Run now`	Starts a send immediately. Disabled if the main switch is off or QuickBooks needs reconnecting.	Click.	
Status line (read-only)	Shows last run time and result, and counts: Needs review, Failed, Retrying.	Read only.	
`Retry` (per problem)	Tries a failed item again. Items marked pending retry on their own.	Click.	Toast "Tried again."
Needs-your-review rows	Each shows the item, why (for example "Changed in both places", "Invoice number already used in QuickBooks", "Totals do not match", "QuickBooks would not void it", "Payment in QuickBooks does not match", "Changed after it was sent") and VisionScaper's against QuickBooks' values. Buttons: `Keep mine` (not for payments or expenses), `Keep QuickBooks'` (reads `Record it here` for a payment), `Try again`, `Ignore`.	Pick one per row.	
Activity log (fold-out)	Table of the latest entries: When, What, Result, Note.	Read only.	

Steps

1. Create the Intuit app and keys as the walkthrough says.
2. Paste **Client ID** and **Client secret**. Choose **QuickBooks company** and **How data moves**.
3. Click **Save settings**, then **Connect QuickBooks Online**. Pick your company at Intuit.
4. Click 🔄 **Update now** to test the customer sync.
5. Optional: add the webhook address at Intuit and paste its key into **Security key**, then **Save settings**.
6. For invoices and payments, tick **Send invoices and payments to QuickBooks…**. Click **Run now**.
7. Check the status counts. Work through any review rows.

Tips

- Use Sandbox first if you want to test with fake data. Switching later needs a disconnect.
- Turn on the expenses switch only when you want expenses in QuickBooks.

If something goes wrong

- **"QuickBooks needs you to reconnect":** press **Reconnect**. Nothing is lost.
- **"QuickBooks asked us to slow down":** the card shows when the next try is.
- **"Connect QuickBooks above first":** the money card is waiting for a connection.
- **"Disconnect first, then switch between Production and Sandbox":** do exactly that.

Settings → Connected apps: Xero card, field by field

Field-by-field guide to the Xero card: keys, connect, organisation, account codes, automatic sending and retries.

Where to find it: Contractor Hub → Settings & Integrations → Settings → group **Messages and connections** → tab 🔌 **Connected apps**, card **Xero**. Owner screen. If Xero is not in your plan the card shows "Xero is not part of your current plan." with a **Try again** button.

What it controls: a one-way feed. The card says: "VisionScaper sends customers, invoices and payments to Xero. Nothing is read back or changed from Xero." It also says: "Xero charges for its own plan. VisionScaper adds no fee for this."

Before you start

- A Xero account and organisation. Make a web app in developer.xero.com. See `get-xero-keys`, and follow Xero's current instructions on Xero's screens.
- The card lists three steps: make an app (type: web app); add the **redirect address** shown on the card as its redirect address; copy the Client ID and Client secret here.
- For payments you also need the account code of the Xero bank account the payments go into.

Fields

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Redirect address (read-only, in a box)	The address Xero returns you to after sign-in. Add it to your Xero app.	Copy and paste it into Xero.	Shown in the key steps.
`Client ID`	Identifies your Xero app. Up to 80 characters. You must disconnect before changing it.	Paste from Xero.	Blank
`Client secret`	The app's password. Up to 200 characters. Stored scrambled, never shown again.	Paste from Xero.	Placeholder "Saved. Type a new one to replace it." once saved.
`Save keys`	Saves the Client ID and secret.	Click.	Toast "Saved."
`Connect to Xero`	Opens Xero to sign in and choose your organisation. Shown once keys are saved and you are not yet connected.	Click.	Page text: "Keys saved. Next, sign in to Xero and choose your organisation."
`Change keys`	A fold-out that shows the key fields again.	Click to edit.	
`Reconnect`	Shown inside a red notice "Xero needs you to sign in again. Nothing is being sent until you do."	Click.	
`Xero organisation`	A list shown only when more than one organisation is available. Chooses where records go. Records already sent to another organisation are not sent again here.	Pick one.	Your first or chosen organisation.
`Xero account for sales`	The Xero account code that invoice lines post to. It cannot be empty.	200 (Xero's usual one). Up to 20 characters.	200
`Xero bank account for payments`	The account code payments are put into. Needed before payments can be sent.	The code of your bank account in Xero.	Blank. The hint "Needed before payments can be sent." appears when you are connected, sending payments, and it is empty.
`Look up my Xero accounts`	Fills the two boxes' suggestion lists from your Xero chart of accounts (sales accounts and bank accounts).	Click, then tap a box and choose.	
`Send automatically every hour`	Runs a send every hour.	Tick or untick.	Off
`Send customers`	Includes customers in each send.	Tick or untick.	On
`Send payments`	Includes payments in each send.	Tick or untick.	On
`Save settings`	Saves the two codes and three switches.	Click.	Toast "Saved."
`Send to Xero now`	Starts a send immediately. Disabled if Xero needs you to reconnect.	Click.	Toast shows a summary.
`Disconnect`	After you confirm, disconnects. Nothing in Xero is deleted. Reconnecting later will not send anything twice.	Click to leave.	Also turns automatic sending off.
`Try again after fixing`	Shown in a list headed "Xero turned down N item(s)". Each line gives the item and Xero's message. The button resends them.	Fix the cause, then click.	Up to 20 shown.

Read-only lines: "Connected to ", "Last sent: · ", the last error if any, and "Sent so far: N customers, N invoices, N payments."

Steps

1. Create your Xero app and copy the redirect address into it.
2. Paste **Client ID** and **Client secret**, then **Save keys**.
3. Click **Connect to Xero**, sign in, choose the organisation.
4. Click **Look up my Xero accounts**. Fill **Xero account for sales** and **Xero bank account for payments**.

5. Choose which of **Send customers** and **Send payments** you want.
6. Click **Save settings**, then **Send to Xero now**. Read the toast.
7. Tick **Send automatically every hour** once the first send looks right, and save again.

Tips

- Only the sales code is mandatory. Without the bank account code, payments are not sent.
- Records already sent are tracked per organisation.

If something goes wrong

- **"Disconnect first, then change the Client ID."** You tried to change the ID while connected.
- **"Enter the Xero account code invoices should post to…":** the sales field was empty.
- **The red "Xero needs you to sign in again" notice:** click **Reconnect**.
- **"Xero turned down N items":** read each message, fix it in Xero or VisionScaper, then click **Try again after fixing**.

Settings → Connected apps: Request form, self-booking and spam protection

Field-by-field guide to the Request form for your website card: on switch, services, photos, self-booking and Turnstile.

Where to find it: Contractor Hub → Settings & Integrations → Settings → group **Messages and connections** → tab 🔌 **Connected apps**, card **Request form for your website**. Owner screen.

What it controls: a form you put on your own website. A visitor fills it in. VisionScaper makes a lead (it never merges with an existing customer by itself), sends the customer an instant reply and alerts your office. The card says it is OFF until you tick it. Nothing on this card is switched on just because the page opened.

Before you start

- Your services come from your service templates. Set them up first (Services). If a service is missing from the list, add it there.
- Self-booking uses the working hours, time off and booked visits of the people you tick. Set those up first. See `settings-crew-list-private-notes-and-working-hours`.
- Turnstile needs your own free Cloudflare account. Follow Cloudflare's current instructions to get a site key and secret key.
- Your own questions for the form are on the Intake questions tab. See `settings-intake-questions`.

Fields

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
`Turn the request form on`	Master switch. Off means the form does not accept requests.	Tick to turn on.	Off
Services offered (one checkbox per service template)	Services visitors can choose. Unticked services are not offered. If you leave none ticked, the save does not send a list and your earlier list stays.	Tick your services.	The services already switched on stay ticked.
`Photos allowed (0 = none)`	How many photos a visitor may attach. Saved between 0 and 10.	5	5
`Let visitors pick a time. The Hub works out open times from your crew's hours, time off and booked visits; it stays a request until you confirm it.` (checkbox under **Self-booking (optional)**)	Adds a time picker to the form. The time is a request until you confirm it.	Tick to turn on.	Off
`Confirm picked times automatically (off is safer)`	When on, the picked time is confirmed without you.	Leave off while you test.	Off
`Visit length (minutes)`	How long each visit slot is. Saved between 15 and 240.	60	60
"Who can be booked:" (one checkbox per person)	Only ticked people get bookable times.	Tick the people who take visits.	None ticked until you choose.
`Use Cloudflare Turnstile` (under **Spam protection**)	Adds Cloudflare's check to the form. It needs both keys below.	Tick only if you see spam.	Off
`Turnstile site key`	The public key from Cloudflare. Only letters, numbers, - and _ are kept.	Paste it.	Blank
`Turnstile secret key`	The private key. Stored, never shown again. Leave blank to keep the saved one.	Paste it.	Placeholder "Secret saved (leave blank to keep)" once saved.
Save	Saves everything on this card. Refused with "Cloudflare Turnstile needs both a site key and a secret key." if Turnstile is ticked and a key is missing.	Click once.	Toast "Saved."

Settings the code keeps but this screen does not show: the largest file size per photo (default 5 MB), the earliest booking lead time (default 24 hours) and how many days ahead people may book (default 14). They have no inputs here.

Spam protection that is always on

"Always on: a hidden trap field, a minimum fill-in time and a limit per address." Turnstile is an extra. Cloudflare lists it as free (up to 20 widgets, unlimited challenges), but you need your own Cloudflare account and visitors' browsers contact Cloudflare when the form loads. Leave it off unless you see spam.

Put it on your website (three read-only boxes)

Click a box to select its text.

Box (exact label)	What it holds	How to use it
"Shortcode (WordPress page):"	`[dreamscaper_request pro="…"]` with your number	Paste into a WordPress page or post.
"Or paste this one line anywhere:"	A one-line script tag	Paste into any page's HTML.
"Or link to the form page:"	A direct web address to the form	Use as a link or button target.

The consent box on the form is not ticked for the visitor and is not marketing consent. It is stored with its wording and the time so you can show what they agreed to.

Steps

1. Open 🔌 **Connected apps** and find **Request form for your website**.
2. Tick the services to offer. Set **Photos allowed**.
3. If you want online booking, tick the self-booking checkbox, set **Visit length (minutes)** and tick who can be booked. Leave auto-confirm off at first.
4. Leave Turnstile off unless you get spam.
5. Tick **Turn the request form on**, then click **Save**.
6. Copy the shortcode, the one-line script or the page link into your website.
7. Submit a test request from your own site and check your Inbox.

Tips

- Keep **Confirm picked times automatically** off until you trust the open times shown.
- A request made through the form shows up as a lead in your list.

If something goes wrong

- **The form shows nothing on your site:** check that the form is switched on and that you saved.
- **"Cloudflare Turnstile needs both a site key and a secret key":** add the missing key or untick Turnstile.
- **No times offered:** check that people are ticked under "Who can be booked" and that their hours, time off and booked visits leave open time. (Exactly when the form hides the picker was not traced in code.)

Zapier & API keys: Access keys and Alerts to other tools

Field-by-field guide to making access keys and adding, testing and managing alerts that tell other tools what happened.

Where to find it: Contractor Hub → Settings & Integrations → **Zapier & API keys** (it follows Connected apps in the menu). The page heading reads "Connect other tools". Owner screen.

What it controls: two things. **Access keys** let another program read or add data in your VisionScaper. **Alerts to other tools** make VisionScaper send a short message to a web address when something happens. The page says: "Nothing here changes how you use VisionScaper day to day."

At the top you see: "Your plan allows N requests an hour from all your keys together (N used this hour). The limit is a placeholder, not approved." If your plan does not include this feature, the page shows your plan message and a **See plans** button.

Before you start

- This feature is a plan feature ("API & Zapier"). Which plan includes it is a placeholder, not approved.
- Your website must be able to store secrets safely (PHP OpenSSL). Making an alert fails otherwise and the message says to ask your host.
- Keep keys like passwords. Make one key per tool.

Tab 1: Access keys

Make a key

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
`What will use it?`	A name so you remember what the key is for. Required. Up to 80 characters.	Zapier, or Reporting sheet	Blank
What may it do? `Look at customers and leads (read_customers)`	Lets the key read customers and leads.	Tick if needed.	Off
`Add and change customers (write_customers)`	Lets the key add and change customers.	Tick if needed.	Off
`Look at quotes (read_quotes)`	Read quotes.	Tick if needed.	Off
`Look at invoices (read_invoices)`	Read invoices.	Tick if needed.	Off
`Look at jobs (read_jobs)`	Read jobs.	Tick if needed.	Off
`Add new leads (write_leads)`	Lets the key add new leads.	Tick if needed.	Off
`Look at payments (read_payments)`	Read payments.	Tick if needed.	Off
`Set up alerts (needed by Zapier) (webhooks_manage)`	Lets the key create and remove alerts. Zapier needs this.	Tick for Zapier.	Off
`Make a key`	Creates the key. You must have a name and at least one box ticked. You can have at most 20 active keys.	Click once.	Error text appears under the form.

The "Copy your new key now" box (read-only)

Item (exact label)	What it does	Notes
Key box	Shows the full key once. It starts with `vsk_`. Only the first 12 characters are shown later in the list.	If you lose it, turn it off and make another.
`Copy key`	Copies it.	Toast "Copied."
`I have saved it`	Hides the box.	The key cannot be shown again.

Your keys (list)

Each row shows the name, the first characters, "Turned off" if off, which things it may do, "Last used … · used N times".

Item (exact label)	What it does	Notes
`Turn off`	After you confirm, the key stops working at once.	Cannot be turned back on; make a new key.

Tab 2: Alerts to other tools

Add an alert

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
`Send alerts to this address`	The web address that receives each alert. Must start with `https://`, be under 500 characters and be a public website.	https://example.com/where-to-send-alerts	Blank
Tell it when... `A new lead comes in (lead.created)`	Sends an alert for each new lead.	Tick what you need.	Off
`A customer is added (customer.created)`	Alert for each new customer.		Off
`A quote is sent (quote.sent)`	Alert when a quote is sent.		Off
`A quote is accepted (signed) (quote.accepted)`	Alert when a customer signs.		Off
`A job is marked done (job.completed)`	Alert when a job is done.		Off
`An invoice is paid (invoice.paid)`	Alert when an invoice is paid.		Off
`Add alert`	Creates the alert and shows its signing secret once. At least one event is required. You can have at most 25 alerts.	Click once.	

The signing secret box (shown once)

Item (exact label)	What it does	Notes
Signing secret (read-only, starts with `whsec_`)	The receiving tool uses it to check that an alert really came from VisionScaper.	Shown only once.
`Copy`	Copies it.	
`I have saved it`	Hides it.	

Your alerts (one block per alert)

Each shows the site name, **On** or **Off**, a "From Zapier" tag when Zapier made it, what it tells about, a reason if it was switched off, and "Last try ... worked / answered N / no answer".

Button (exact label)	What it does for VisionScaper	Notes
`Send a test`	Sends a harmless test message now and shows what the other side answered.	Toast says "The test arrived..." or why it did not.
`Turn off` / `Turn on`	Pauses or resumes the alert. Turning on clears the failure count.	
`Recent tries` / `Hide recent tries`	Shows a table: When, What, Result.	
`Send again` (in the table, failed tries only)	Queues a failed alert again.	Not for test messages.
`New secret`	After you confirm, makes a new signing secret. The old one stops working.	The new one is shown once.
`Remove`	After you confirm, deletes the alert.	

Alerts are signed and retried. A failed alert is tried again after 1 minute, 5 minutes, 30 minutes, 2 hours and 6 hours, then given up. After 10 failures in a row the alert is switched off and you are emailed.

Steps

1. Open **Zapier & API keys**.
2. On **Access keys**, type a name, tick only what the tool needs, click **Make a key**.
3. Click **Copy key** and paste it into the other tool now. Click **I have saved it**.
4. On **Alerts to other tools**, type the receiving address, tick the events, click **Add alert**.
5. Copy the signing secret into the receiving tool.
6. Click **Send a test** and read the toast.

Tips

- Give each key the fewest boxes it needs.
- Turn off keys for tools you stopped using.
- Use **Recent tries** to see why an alert failed.

If something goes wrong

- **"You have 20 active keys":** turn one off.
- **"You have 25 alerts set up":** remove one.
- **"The address must start with https://":** fix the address.
- **"That address can't be reached from the internet":** use a public address.
- **Rate-limit (429) from your tool:** you passed the hourly limit; wait.

Zapier & API keys: the Zapier and How it works tabs

The read-only addresses on the Zapier and How it works tabs, what each is for, and how to use them with a key.

Where to find it: Contractor Hub → Settings & Integrations → **Zapier & API keys**, tabs **Zapier** and **How it works**. Owner screen. The four tabs are **Access keys**, **Alerts to other tools**, **Zapier**, **How it works**. Use the arrow keys to move between them.

What it controls: nothing is typed or saved on these two tabs. They hold read-only addresses (each with a **Copy** button) and instructions. Every address is specific to your website.

Before you start

- Make a key first, with "Set up alerts (needed by Zapier)" ticked. See `zapier-and-api-keys-access-keys-and-alerts`.
- VisionScaper has no published Zapier app. The tab says so: "VisionScaper does not have a published Zapier app. You connect it with Zapier's 'Webhooks by Zapier' (or your own private Zapier app) using an access key." You set the connection up yourself in Zapier. For Zapier's own screens, follow Zapier's current instructions, and see `get-zapier-setup`.

Tab: Zapier

Field (exact label)	What it does for VisionScaper	What to do with it	Default / notes
`Subscribe address` (read-only + `Copy`)	Where Zapier sends a POST to start receiving an event. VisionScaper then creates an alert for it (shown with a "From Zapier" tag).	Paste into Zapier's Custom Request step.	Specific to your site.
`Unsubscribe address` (read-only + `Copy`)	Where Zapier sends a POST when the Zap is turned off.	Paste into Zapier.	
`Sample address (add the event name)` (read-only + `Copy`)	Lets you test a trigger before real data exists. Add the event name at the end, for example `lead.created`. It lists your newest real records, or one clearly marked example if you have none yet.	Paste and add the event name.	The box already ends in `lead.created`.

The tab's numbered steps:

1. On the **Access keys** tab, make a key named Zapier. Tick "Set up alerts (needed by Zapier)" and what you want Zapier to look at or add.
2. In Zapier, add a step using "Webhooks by Zapier" (or your own private Zapier app). Choose "Custom Request".
3. To react to something in VisionScaper, have Zapier send a POST to the Subscribe address with your key in a header named `Authorization` (the word `Bearer`, a space, then the key). Send the event name and the address Zapier gave you. Do the same with the Unsubscribe address when the Zap is turned off.
4. To test a trigger before it has real data, ask the Sample address for the event.
5. To add a lead or customer from Zapier, send a POST to the leads or customers address on the **How it works** tab.

The tab ends with "Events you can use:" and the list: `lead.created`, `customer.created`, `quote.sent`, `quote.accepted`, `job.completed`, `invoice.paid`.

Tab: How it works

Field (exact label)	What it does for VisionScaper	What to do with it	Default / notes
`Starting address` (read-only + `Copy`)	The base address for the whole programming interface. Add a name on the end, for example `customers`.	Use as the start of every request.	Specific to your site.

Rules on the tab (all JSON):

Topic	What it says
Sending your key	Send it in a header: `Authorization: Bearer <your key>`.
Example	`curl <starting address>customers -H "Authorization: Bearer YOUR_KEY"`
Lists	customers, quotes, invoices, jobs, payments. Add `?limit=25` and for the next page `?cursor=` with the `next_cursor` you were given. The server accepts a limit from 1 to 100; the default is 25.
Adding things	POST to `customers` or `leads`. A person with the same email or phone is never added twice; you are told who already exists.
Retrying safely	Add an `Idempotency-Key` header to anything that adds or changes data.
Limits and plan	Over the hourly limit you get a 429 answer with a `Retry-After` header. If your plan does not include this you get 402.
Signed alerts	Each alert carries an `X-VisionScaper-Signature` header: `t=<time>,v1=<code>`. The code is HMAC-SHA256 of `<time>.<body>` using your signing secret. A failed alert is retried after 1 minute, 5 minutes, 30 minutes, 2 hours and 6 hours, then given up. After 10 failures in a row the alert is switched off and you are emailed.

Steps

1. Make a key (Access keys tab). Copy it.
2. Open the **Zapier** tab. Click **Copy** next to the Subscribe address.
3. In Zapier, add a Custom Request step with that address and your key in the `Authorization` header.
4. Use the Sample address to test.
5. Check the **Alerts to other tools** tab: the Zapier alert appears with a "From Zapier" tag.

Tips

- Keep the signing secret private. Only use it to check signatures.
- The same key and the same hourly limit apply to Zapier and to your own programs.

If something goes wrong

- **401 or 403 from VisionScaper:** the key is wrong, off, or missing a needed box. Make a new one.
- **402:** your plan does not include this.
- **429:** wait for the number of seconds in `Retry-After`.
- **No Zapier alert appears:** the key lacks "Set up alerts (needed by Zapier)", or the POST had no valid event.

Current plan, usage and credits: every control explained

Field-by-field guide to the Current plan screen: trial, plan choice, card, cancel, usage, exports and AI credits.

Where to find it: Contractor Hub → Settings & Integrations → **Current plan** (tab title on the page: "Plan & billing"). Owner screen. AI credits open as a pop-up from the account menu or from an AI button (not from this screen).

What it controls: your subscription, what each plan includes, how much of each allowance you have used, your card, cancelling, and exporting your records. The page text: "Your plan, what it includes, how much you've used, and your billing."

Before you start

- All prices, allowances, trial lengths and which plan holds which feature are placeholders, not approved. Set your own in the website owner's settings. Anything you see on screen comes from there.
- If billing is not switched on for the website, the page only says "Everything is included" ("Billing isn't switched on on this website, so you have the full Contractor Hub at no charge.") and shows the export buttons.
- Card payments go through Stripe. See `get-stripe-keys` for the website owner's side.

Top card (status) and its buttons

The headline changes with your status: Free access, Free trial available, Free trial · N days left, " plan" with a renewal date, a payment-failed notice, Suspended, or Subscription ended. Under it:

Control (exact label)	What it does for VisionScaper	What to do	Default / notes
💳 `Card, invoices & receipts`	Opens Stripe's billing portal in the same window.	Click to update the card or see invoices.	Shown when a card is on file.
💳 `Update payment method`	Same button when a payment failed.	Click.	
💳 `Update Payment Method & Restore Account`	Same button when the account is suspended. Paying restores everything.	Click.	
`Cancel subscription`	Opens a "Cancel your subscription?" window.	See the cancel window below.	Shown for active, trial or past-due accounts with a card.
`Keep my subscription`	Undoes a pending cancellation.	Click.	Shown only when an end date is set.
`Text me if a subscription payment needs attention (never overnight)`	Texts you if a payment fails. Email is sent either way.	Tick or untick.	Shown only when billing is on and texting is set up. Saves at once.

The cancel window

Says you keep full access until the end of the period (or, on a trial, you will not be charged), that records stay safe for at least a set number of months (a placeholder, not approved) and that you can come back. It includes the export buttons and two buttons: `Cancel at the end of this period` and `Keep my subscription`.

Plans card

Control (exact label)	What it does for VisionScaper	What to do	Default / notes
`Monthly` / `Yearly · 2 months free`	Switches the prices shown between monthly and yearly.	Click one.	Your current billing period.
Plan card (read-only)	Name, tagline, price, headline allowances (employees, crews, AI credits a month, storage, landscape plans a month) and "what's included" lines.	Read.	All placeholders, not approved.
`Start N-day free trial`	Opens the trial window (below). Shown on the trial plan when you are eligible.	Click.	
`Choose <plan>`	Goes to Stripe's secure checkout. Button reads "Opening secure checkout…".	Click.	
`Switch to <plan>`	After you confirm, changes your plan. Stripe works out the difference for the rest of the period.	Click.	Shown when you already have a card.
`Your plan` (badge) / `Not available yet`	Marks the current plan, or a plan that cannot be bought yet.	Read.	

Start your free trial window

Lists what the trial gives (trial allowances of AI credits and landscape plans, placeholders), that you add a card now and are not charged today, the price on the first day after the trial, reminder emails a week and a day before, cancelling in one tap, and one free trial per business. Button: `Add card & start my free trial`.

Before the card step, a window titled "Verify your business" may ask you to confirm by a 6-digit code:

Field (exact label)	What it does	What to enter	Notes
`Mobile number`	Where to text the code.	Your mobile.	Only for the phone step.
`Text me a code` / `Email me a code`	Sends a code (email goes to your business email in Business profile).	Click.	Can be sent again after 20 seconds.
`6-digit code`	The code you received.	Type it.	One free trial per phone number.
`Verify`	Checks the code.	Click.	

Not sure which plan? (plan quiz)

Field (exact label)	What it does	What to choose	Notes
`1. How big is your crew?`	Sets how many field employees you need room for.	`Just me and one helper`, `Up to 3 field employees`, `Up to 10`, `More than 10`.	Starts at the first.
`An AI receptionist to answer calls`	Requires the AI Receptionist.	Tick if wanted.	
`Route planning for the day`	Requires the Route Optimizer.	Tick if wanted.	
`Yes, job profit reports`	Requires job profit reports.	Tick if wanted.	
`Suggest a plan`	Names the smallest plan that has everything you chose.	Click.	Says assignments are placeholders, not approved.

Compare plans and usage

- `Show every feature` / `Show only what differs` toggles a table of features by plan. Cells read Included, Not included, Unlimited, a number, or Planned.
- **Your usage** shows bars for each limit (for example employees, crews, AI credits, landscape plans a month, storage). Monthly allowances start again on the 1st. Reaching a limit never deletes anything; it stops you adding more. A **Recent usage** fold-out lists the latest units used.
- **Billing history** lists events with dates and amounts.
- If a payment fails: full access while it is retried; extras pause at a set day; the account turns read-only; then it is suspended. Day numbers are placeholders. Nothing is deleted and paying restores everything.

📦 Export your records

Six download buttons: `Customers`, `Properties`, `Quotes`, `Invoices`, `Schedule`, `Activity log`. Each downloads a spreadsheet (CSV). They work on any plan and even if you are paused or cancelled.

AI credits pop-up

Opened from the account menu or an AI button. Titled "AI credits".

Control (exact label)	What it does for VisionScaper	What to enter	Default / notes
Balance tiles (read-only)	"free left today (of N)", "purchased credits", "ready to use".	Read.	Free credits refill at midnight; purchased credits never expire and are used after the free ones. Amounts are placeholders, not approved.
Credit pack buttons	Each button buys that pack at its price through Stripe. The best-value pack is tagged.	Click one.	Packs and prices set by the website owner.
`Number of credits` (with Fewer / More buttons)	Lets you choose an exact number. Stays between the website's minimum and maximum. The total updates.	Type or step by 5.	Starts at 10 or the minimum.
`Buy`	Buys that exact number.	Click.	Opens Stripe checkout.

Another pop-up, "This uses 1 AI credit", appears before an AI action. It has `Don't ask me again`, `Cancel` and `Use 1 credit`. "Don't ask me again" is stored in your browser only.

Steps

1. Open **Current plan**. Read the top card.
2. Pick **Monthly** or **Yearly**.
3. If you are new, click **Start N-day free trial**, verify, then add a card at Stripe.
4. Otherwise click **Choose** or **Switch to** .
5. Check **Your usage** once a month.
6. To stop, use **Cancel subscription** and export your records first.

Tips

- Use **Suggest a plan** if you are unsure.
- Export your records before cancelling. It costs nothing.

If something goes wrong

- **"That card has already been used for a free trial":** the trial was cancelled and you were not charged. Choose a plan.
- **Payment failed notice:** click the update-payment button.
- **Limit reached:** wait for the 1st of the month, buy a credit pack (for AI credits) or upgrade.

Customer form: every field

What each box on the Add customer / Edit customer form does and what to type.

Contractor Hub → Customers → **Add customer** (also the **+** quick-add menu, or **Edit** on a customer's page). Anyone with the right to add or edit customers in the Hub can use it; crew roles only see it if the owner ticked the customer permissions (see the employee article).

This form creates or changes one customer: contact details, the main property address, where the lead came from, project wishes, access notes and extra contacts. The only required box is **Full name**. Everything else is optional and can be filled in later.

Before you start

- Nothing else is needed. The Street box uses address suggestions; if suggestions do not appear, type the address by hand.

Fields

Top

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Property photo (button) (`photo`)	Takes a picture file and saves it as this customer's property photo (shown as a small round picture on the customer).	Press it, choose a photo from your device or camera. Optional.	Shows a house emoji until a photo is added.
Full name * (`name`)	The customer's name everywhere: lists, quotes, invoices, message shortcodes such as {customer_name}.	First and last name, e.g. Jane Smith. Required: the form will not save without it.	Required
Company (`company`)	Business or organisation name, searchable in the customer list.	e.g. Maple Hill Condos. Leave blank for homeowners.	
Mobile phone (`phone`)	Main phone. Used for calls and for texts when text messaging is set up.	e.g. 860-555-0123.	
Other phone (`phone2`)	A second number, kept in the customer's Details card.	Home or work number.	
Email (`email`)	Where proposals, invoices and campaigns are emailed.	e.g. jane@example.com.	
Prefers (`pref`)	How the customer likes to be contacted. Saved on the customer and shown in the Details card. (Whether messages obey it automatically is not verified in code.)	Pick one. Choices: Text; Phone call; Email.	Text

Property address

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Street (`address`)	Main property address. Start typing and pick a suggestion; town, state and ZIP fill in for you. Becomes the customer's first property.	e.g. 12 Oak Lane.	
Town (`town`)	Property town; used in the customer list and for campaign town filters.	e.g. Avon.	
State (`state`)	Two-letter state.	e.g. CT.	Your business state if known
ZIP (`zip`)	Postal code.	e.g. 06001.	

Potential customer

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Stage (`stage`)	Where this person is in your pipeline. Filters the customer list and campaign audiences.	Pick the stage that fits today. Choices: Potential customer; Prospect; Customer; Past customer; Lost.	Potential customer
How they found you (`source`)	Records the lead source for reports and the Sales board.	Pick the closest match. Choices: Website; Phone call; Text message; Referral; Social media; Contractor referral; VisionScaper; Repeat customer; Other.	Phone call
Referred by (`referred_by`)	Who sent them to you, so you can thank them.	e.g. Mark at 14 Elm St.	
Best time to reach (`best_time`)	Free text hint shown in the Details card and to crew.	e.g. weekdays after 5.	

Project

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Interested in (`interests`)	What they want done; saved for you and for campaign wording.	e.g. patio, plantings, lighting.	
Budget (`budget`)	Their stated budget, free text.	e.g. $5-10k.	
Timeline (`timeline`)	When they want it done, free text.	e.g. this spring.	
Property type (`property_type`)	Kind of property.	Pick one. Choices: Residential; Commercial; HOA / condo; Rental property.	Residential

More details (access, pets, utilities, billing) - opens with the arrow

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Lot size (`lot_size`)	Free-text size of the lot.	e.g. 0.5 acre.	
Gate / access (`gate`)	Gate code or access notes. Shown to the crew on the job card.	e.g. gate code 1234.	
Pets (`pets`)	Warns the crew about animals.	e.g. dog in yard.	
Irrigation (`irrigation`)	Whether the property has a sprinkler system (shown on the crew job card).	Pick one. Choices: Unknown; Yes - has irrigation; No irrigation.	Unknown
Hidden utilities (`utilities`)	Things the crew must not hit while digging.	e.g. invisible fence, propane, septic.	
HOA (`hoa`)	HOA name or rules to follow.	e.g. Brook Run HOA, no work before 8am.	
Billing address (if different) (`billing_address`)	Address for invoices when it is not the property.	Only fill in if different.	
Maintenance (`maintenance`)	Their ongoing plan, if any. Saved on the customer.	Pick one. Choices: No maintenance plan; Weekly maintenance; Every 2 weeks; Monthly; Seasonal cleanups.	No maintenance plan
Tax exempt (`tax_exempt`)	Marks the customer as tax exempt. Saved on the customer; whether quotes and invoices skip tax for them automatically is not verified in code.	Tick for tax-exempt customers (for example a non-profit).	Off

Other contacts (repeat for each person)

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Name (other contact) (`contacts[].name`)	Another person on the account, such as a spouse or property manager. They can be chosen as recipients when you send a quote.	Full name.	
Role (spouse, tenant, manager) (`contacts[].role`)	Label for the contact.	e.g. Spouse.	
Email (other contact) (`contacts[].email`)	Email for that person.		
Phone (other contact) (`contacts[].phone`)	Phone for that person.		
Remove contact (trash button)	Deletes that contact row.		
+ Add another contact	Adds one more empty contact row. Rows with no name, email or phone are dropped when you save.		

Bottom

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Tags (`tags`)	Free labels used by search and campaign tag filters.	Separate with commas, e.g. VIP, corner lot.	
Notes (`notes`)	Private notes saved on the customer.	Anything you want to remember.	
Save customer / Add customer	Saves the form. A new customer opens its page afterwards.		

Steps

1. Open Contractor Hub → Customers and press **Add customer** (or open a customer and press **Edit**).
2. Type the **Full name**. This is the only required box.
3. Add the phone and email, then start typing the **Street** and pick the suggestion so town, state and ZIP fill themselves.
4. Choose the **Stage** and **How they found you**. New phone calls usually start as **Potential customer**.
5. Fill in **Project** boxes if they told you what they want.
6. Open **More details** and add gate codes, pets and hidden utilities. Crew see these on the job.
7. Add any **Other contacts**, then **Tags** and **Notes**.
8. Press **Add customer** (or **Save customer**). A short message says the customer was added or saved, and the customer page opens.

If something goes wrong

- If the form shows a red message under the Save button, read it: it comes from the website (for example a plan limit on how many customers you can add).
- If the Street suggestions do not appear, type the address in full including town and state.
- The Property photo button does nothing if you cancel the file picker; press it again.

Property and activity-note forms

The small forms for adding a property, property photo, property notes and logging a call or note.

Contractor Hub → Customers → open a customer. The **Properties** section has the property buttons and the top of the page has **Log call / note**.

A customer can have several properties. Each property keeps its own address, photos, notes, slope check and 2D plan. These small pop-ups are how you add and edit them. This article covers the three pop-ups that have an input box.

Fields

Add a property (pop-up)

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Property address (`(input)`)	Creates a new property on this customer. Used by quotes, visits, measuring and route planning.	Start typing and pick from the list, e.g. 48 Birch Rd, Avon, CT. Needs at least 6 characters or it asks you to type street, town and state.	
Save (Add a property)	Creates the property and reloads the customer page.		

Property card buttons that ask a question

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Add photo (button) (`photo step`)	Opens your file picker, then asks "What is this photo of?" and saves the picture on the property.	Answer with one word such as front, back, left side, right side, structure or existing landscape. Default answer is front.	front
Notes (button) (`data.notes`)	Asks "Property notes (soil, sun, drainage, access...)" and saves your text on the property. It shows next to the plan summary.	e.g. Clay soil, full sun, drains toward street.	
Check slope (button) (`slope`)	Appears only when the property has map coordinates. Looks up elevation around the lot and stores the slope percent and class on the property; the quote page then shows the slope.	Press once; the message tells you the percent and class.	
Create a landscape plan / Plan wizard / Open 2D plan	Open the plan wizard or the 2D plan editor for this property. The plan editor itself is documented with the Designer.		

Log call / note (pop-up)

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Type (`kind`)	What kind of history entry this is.	Pick one. Choices: Phone call; Note; Meeting / site visit; Email (sent outside VisionScaper); Text (sent from my phone).	Phone call
Details (`text`)	The text saved in the customer's history.	What happened and the next step.	
Save to history	Adds the entry to the history list. Nothing is sent to the customer.		

Steps

1. Open the customer from Customers.
2. To add a property press **+ Add property**, type the address, pick the suggestion, press **Save**.
3. On a property card press **Add photo**, choose the picture, answer the question with a one-word label.
4. Press **Notes** to record soil, sun, drainage or access. Press OK in the box.
5. If the property has a map pin, press **Check slope** once and wait for the message.
6. At the top of the customer page press **Log call / note**, choose the **Type**, write the **Details**, press **Save to history**.

If something goes wrong

- "Type the street, town and state." means the address was too short. Add the town and state.
- Adding a property can be refused by the website (for example a plan limit). The message appears at the bottom as a toast.
- Cancelling a prompt box leaves everything as it was.

Lead and request intake: Request sources

The boxes and buttons for bringing Angi, Thumbtack and similar requests into the Hub as customers marked as leads.

Contractor Hub → Request sources (address #/sales/lead-sources, listed under the Clients group). It needs a plan that includes request sources; if not, the page shows a **See plans** button.

Leads from services like Angi, Thumbtack or Google Local Services become customers marked as leads. Each source has its own secret address. You can also paste one request email into a box and check what VisionScaper can read before it adds anything. The layouts it reads are based on typical notification emails and are not checked against live ones.

Before you start

- Manual leads are simpler: add them with the Customer form and set **Stage** to Potential customer.
- No mailbox is read for you. You send or forward emails to the secret address yourself (or set your lead service to notify it).

Fields

Each source card

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Secret address (keep it private) (`url (read-only)`)	The unique address for this source. Anything that arrives there is read and turned into a request. Click to select it.	Copy it into the lead service's "send notifications to" setting or a mail forwarding rule.	One per source
Copy address	Copies the address.		
Make a new address	Creates a new secret address; the old one stops working at once (asks you to confirm).	Use if the address leaked.	
Turn off / Turn on (`active`)	Pauses or resumes a source without deleting it.		
Test with a sample	Shows a sample email and what would be read. Nothing is added.		

Recent requests

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Open customer	Opens the customer made from that request.		
Try again	Shown on held requests; tries to add it again (for example after a plan limit changes).		
Mark seen / Mark all seen	Clears the "new" badge.		

Paste a request email

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Which service sent it? (`id`)	Chooses which source's reading rules to use.	Pick the service the email came from. Choices: One entry per source on the page.	First source
The email (`text`)	The whole request email or forwarded text.	Paste everything, including name, phone, address and message.	
Check it	Reads the text and shows Name, Phone, Email, Address, Service and Message as found, plus warnings. Nothing is added yet.		
Add this request	Appears after a check; creates the customer (or updates one with the same phone or email so there is no duplicate).		

Steps

1. Open Request sources.
2. Copy the **Secret address** for the service you use and put it where that service sends lead emails.
3. Press **Test with a sample** to see how a typical email is read. Nothing is added.
4. When a real request arrives it appears under **Recent requests** with a "new" badge.
5. If something arrived another way, choose the service in **Which service sent it?**, paste the email into **The email**, press **Check it**, read the result, then **Add this request**.
6. Press **Open customer** and fill anything marked as missing.

If something goes wrong

- "Needs review" means a field such as phone was not found. Open the customer and add it.
- A held request means your plan limit stopped it. Press **Try again** after the limit is fixed.
- If the same email is pasted twice you get "You already added this email."

Quote builder: customer, design and estimate lines

Every box in the first half of the quote: project name, customer, design pictures, sections and cost lines.

Contractor Hub → Quotes → new quote (or the **+** menu → Quote, or **Start a quote** from a customer or measurement). The quote has steps: **1. Customer & property**, **2. The design (before & after)**, **3. Estimate → two quotes**. Roles need the quote rights; a signed quote is locked.

The estimate step makes two views from one set of numbers: **Job cost (internal)** for you, and **Customer proposal** for the customer. This article covers the project name, customer, design pictures and the Job cost lines. The proposal text, payments and terms are in the next article.

Before you start

- Add the customer first (the quote will not save without one). Your labor rate, markups, overhead, tax and deposit % come from Settings → Costs and markups and Price book.
- Those shipped defaults are placeholders, not approved; set your own.

Fields

Header

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Project name (`title`)	The quote title. Used in lists, emails ({project_name}) and on the proposal.	e.g. Front Yard Renovation. If blank when saving it becomes "Landscape project".	Blank
Save	Saves the quote. Disabled once signed.		

1. Customer & property

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Choose customer / Change (`client_id`)	Opens a search by name, phone or address. Picking sets the quote's customer and property.	Type a few letters and pick. Customers with several properties ask which one.	
+ New customer	Opens the Customer form; the new customer is attached to the quote.		
Property (`prop_id`)	Shown only when the customer has more than one property. Chooses which property the quote is for (its address, photos, slope and measured plan).	Pick one.	First property

2. The design (before & after)

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Use one of my designs	Opens your saved VisionScaper designs; the chosen design's pictures, plants and features come into the quote.		
Before photo (`design.before`)	Uploads the "Before" picture shown on the proposal.	Choose a photo.	
Design picture (`design.after`)	Uploads the design/"after" picture.	Choose an image.	

3. Estimate buttons

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Add service	Opens the service picker: from a template, from a previous job, or from scratch. Template sections remember the template and version.		
Create Quote Manually / + Add another section	Adds an empty section with one Material line and one Labor line.		
Quote it with AI	Opens the AI dialog described below.		
Use the Landscape plan's quantities	Shown only when the property has a measured plan; rebuilds sections from it (asks before replacing).		
Polish wording with AI	Rewrites section titles, scope text and an introduction without touching numbers.		

Quote it with AI (pop-up)

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
What's the job? (`description`)	Your description; the AI lists work and sizes. Prices always come from your own price book.	Write 1-2 sentences with sizes, what to remove, build and plant.	Filled from the request brief when there is one
Use the measurements (`useM`)	Appears when the property has measurements; the AI uses the exact square footage.	Tick to use.	On when measurements exist
Use the customer's design (`useD`)	Appears when the design has plants; sends the plant list.	Tick to use.	On when a design exists
Create the quote with AI	Builds sections (asks before replacing existing ones).		

Job cost (internal) tab - per section

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Section title (`title`)	Name of the work section; shown on the proposal.	e.g. Foundation bed.	New section
Optional add-on (`optional`)	Makes the section optional; the customer can pick it when signing and it shows its own price.	Tick for extras.	Off
Include (`included`)	Unticked sections are left out of the proposal and totals but kept in the quote.		On
Move up / Delete section	Reorders or removes the section (delete asks to confirm).		
Save as template / Update template / Unlink	Turns the section into a service template, updates the linked template, or removes an AI match.		
Type (`kind`)	Cost category of the line; each category has its own markup.	Pick one. Choices: Material; Labor; Equipment; Subcontractor; Disposal; Delivery; Other.	Material
Item (`name`)	What the line is.	e.g. Boxwood 3 gal.	
Qty (`qty`)	Quantity. Lines marked as needing a quantity glow until filled.	Number.	1
Unit (`unit`)	Unit label.	e.g. ea, hr, sq ft.	ea
Unit cost (`unitCost`)	Your cost for one unit. For Labor lines the crew rate button replaces it: tapping the "$/hr" button lets you set a different rate for just that line.	Your cost, not the customer price.	0 (Labor uses your labor rate)
Remove line / + Add line	Deletes or adds a line.		
Price (per section) (`priceOverride`)	The customer price for this section. Starts at the calculated price; change it to set your own; a "reset" link returns to the calculated one.	Type the final price you want.	Calculated
Discount $ (`discount`)	A dollar discount taken off the estimate total.	Whole dollars, e.g. 250.	0

Totals strip (read-only)

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Your cost / Price / Gross profit / Tax / Customer total / Deposit / Crew hours	Live numbers worked out from the lines, your markups, overhead, tax and deposit %. Gross profit turns red under 25%. A minimum job charge adds a note.	Nothing to enter; change rates in Settings → Costs and markups.	Placeholder defaults, not approved

Steps

1. Open a new quote. Press **Choose customer**, search, and pick the person and property.
2. Type the **Project name**.
3. Add the **Before photo** and **Design picture**, or press **Use one of my designs**.
4. Press **Add service** (templates), **Create Quote Manually**, or **Quote it with AI**.
5. On the **Job cost (internal)** tab, set each section **Title**, then each line's **Type**, **Item**, **Qty**, **Unit** and **Unit cost**.
6. Tick **Optional add-on** for extras. Change a section **Price** only if you want your own number.
7. Add a **Discount $** if needed and check the totals strip.
8. Press **Save**. Then continue with the Customer proposal tab.

If something goes wrong

- "Choose a customer first." means the quote has no customer yet.
- If lines glow, a price or quantity is missing; fill it or the total will be low.
- A "changed since you opened" message means someone else saved the quote; it reloads. Re-apply your edit.
- A signed quote is read-only; make a copy or a change order instead.

Quote builder: customer proposal, payments and terms

The Customer proposal tab: introduction, scope text, price display, payment schedule with deposit, terms and expiry date.

Contractor Hub → Quotes → open a quote → **Customer proposal** tab (the other tab is **Job cost (internal)**). It appears once the quote has at least one section.

This tab is what the customer reads. You edit wording, choose how prices show, set payment steps (including the deposit) and the terms. The wording starts from your saved defaults in Settings; each quote keeps its own copy.

Before you start

- Fill in the Job cost tab first so sections and prices exist.
- Default terms, payment steps and deposit % come from your settings. The shipped deposit of 30% and the sample payment split are placeholders, not approved; set your own.

Fields

Proposal tab

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Introduction (what the finished yard will look like) (`docs.intro`)	Opening paragraph at the top of the proposal. "Polish wording with AI" can write it if empty.	2-3 sentences, e.g. Your front yard gets a clean, curved foundation bed with year-round color.	
Scope of work for (section title) (`section.scope`)	What you will do for that section. Each line becomes a bullet in the proposal. This is your responsibility on the job, so be specific.	One item per line.	"Describe exactly what you will do" on a new section
Show prices (`docs.showPrices`)	Whether the customer sees a price for each section or only the total. Optional add-ons always show their price.	Pick one. Choices: Price for each section; Total only.	Price for each section
Payment schedule - Payment (label) (`payments[].label`)	Name of a payment step.	e.g. Deposit to schedule.	Deposit to schedule / Balance
Payment schedule - Percent (`payments[].pct`)	Share of the total for this step. The first step's percent is the deposit the customer pays when signing. Keep the steps adding to 100.	e.g. 30.	Deposit % from your costs setting (placeholder 30), balance the rest
Payment schedule - When (`payments[].when`)	Words telling the customer when it is due.	e.g. when you sign, on completion.	when you sign / on completion
Remove (payment) / + Add payment	Deletes a step or adds one named for a partial payment, 0%, "when the hardscape is complete".		
Terms (`docs.terms`)	The terms and conditions on the proposal.	Edit the standard text. Plain lines.	Your saved terms, otherwise the built-in standard terms (about one-year plant guarantee, change orders in writing, 811 reminder). Review them with your own advisor.
Price good until (`valid_until`)	Last day the price can be accepted; also the {valid_until} shortcode.	Pick a date.	Today plus your "valid days" setting (placeholder 30)

Buttons on the proposal

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Preview	Shows the proposal as the customer sees it.		
Polish wording with AI	Rewrites titles, scope and intro; numbers never change (sections where the AI changed a number are kept as they were).		
Save	Saves everything.		

Steps

1. Open the **Customer proposal** tab.
2. Write the **Introduction**.
3. For each section, edit the **Scope of work** lines.
4. Choose **Show prices**.
5. Check the **Payment schedule**. Set the first step's **Percent** to your deposit and make the percents add to 100. Use **+ Add payment** for progress payments.

6. Read the **Terms** and edit them.
7. Set **Price good until**.
8. Press **Preview**, then **Save**.

Tips

- E-sign settings: the quote builder has no separate sign settings. Signing happens on the customer's link; the controls you have are "Send for signature", the deposit step and the Terms.

If something goes wrong

- If you cannot type, the quote is signed and locked.
- If percents do not add to 100 VisionScaper does not stop you (not verified in code); fix them yourself before sending.
- An empty Terms box sends no terms. Paste your terms before sending.

Quote builder: Send for signature and follow-ups

The send pop-up and the automatic follow-up editor: recipients, channel, wording, attachments, dates and shortcodes.

Contractor Hub → Quotes → open a quote → **Send for signature** or **Send / follow up**. The buttons show on the status line at the top of the quote.

Sending saves the quote, emails and/or texts the proposal link, and can schedule a six-step follow-up plan that stops by itself when the customer signs or declines. The customer opens the link on their phone, picks add-ons, signs and pays the deposit.

Before you start

- Text messages need text messaging set up by the site owner (Settings → VisionScaper → Text messages; see the Twilio key guide: get-twilio-details). Without it the Text choices say "(not set up)".

Fields

Send pop-up

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Send to (contacts, tick boxes) (`recipients`)	Everyone ticked gets the proposal. The first contact is ticked by default.	Untick people you do not want.	First contact on
+ Add a contact from Customers	Asks for a name to search, then adds the first match.		
+ Someone new	Asks for an email or mobile number and a name.		
Send by (`channel`)	How to send.	Pick one. Choices: Email; Text message; Email + text.	Email
Subject (email) (`subject`)	Email subject; shortcodes are filled per customer.	Edit the wording.	Please review & sign: {project_name} (signature) or Your {project_name} proposal from {company_name}
Message (`body`)	Email/text body; includes the {quote_link}.	Edit freely; keep {quote_link}.	Built-in friendly message with {customer_first_name}, {quote_total}, {deposit_amount}, {quote_link}
Shortcodes - tap one to insert it	Inserts a code where you were typing. Codes: {customer_name}, {customer_first_name}, {customer_address}, {customer_town}, {project_name}, {quote_number}, {quote_total}, {deposit_amount}, {quote_link}, {valid_until}, {company_name}, {contractor_name}, {contractor_phone}, {contractor_email}, {month}, {today}. Codes without a value are sent as-is and a warning shows first.	Tap, do not retype.	
Also include: Before/after picture (`include.image`)	Adds the before/after picture to the message.		On
Also include: Total (`include.total`)	Adds the total.		On
Also include: What's included (`include.scope`)	Adds the scope summary.		On
Follow up automatically if they don't sign (`fuOn`)	Turns the follow-up plan on.	Leave on unless you will chase by hand.	On
Send for signature / Send now	Saves, sends and schedules follow-ups. Needs at least one contact and a built estimate.		

Each follow-up (repeat per follow-up)

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Follow-up N (tick box) (`off`)	Unticked follow-ups are not sent.		On
Date (`at`)	Day it is sent.		Day offsets 1, 3, 7, 14, 21, 30 after sending
Time (`at`)	Time of day.		10:00, 17:30, 12:00 depending on step

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Send by (follow-up) (`channel`)	Email, text or both for this step.	Pick one. Choices: Email; Text; Both.	Email, Text, Email, Text, Email, Both
To (`who`)	Everyone I send it to, or one contact.	Pick one.	Everyone I send it to
Subject (follow-up) (`subject`)	Email subject for this step.		
Message (follow-up) (`body`)	Wording; a preview shows the filled-in text.		
Attach: Proposal link / Before/after picture / Total / What's included (`include.*`)	What to add to this step.		Link on; others vary by step
Remove / + Add follow-up	Deletes a step or adds one a week after the last.		
Save follow-ups (Edit follow-ups dialog)	Replaces the scheduled follow-ups on a sent quote.		

Steps

1. Press **Send for signature** (customer will sign) or **Send / follow up** (link only).
2. Check **Send to**; add people with **+ Add a contact from Customers** or **+ Someone new**.
3. Choose **Send by**. If Text says "not set up", use Email.
4. Edit **Subject** and **Message**; insert codes with the shortcode buttons.
5. Decide what is included with the three **Also include** boxes.
6. Leave **Follow up automatically** on, or untick it. Adjust any date, time, channel, message or attachment in each follow-up.
7. Press **Send for signature** or **Send now**. A message says how many contacts it went to and whether follow-ups were scheduled.
8. Later, press **Edit follow-ups** under the Follow-ups list to change scheduled ones.

If something goes wrong

- "Choose at least one contact." Tick a recipient.
- "Texting isn't set up yet - choose Email." Ask the site owner to set up text messaging.
- "Build the estimate first." The quote has no sections.
- If some contacts fail, the message lists which did not go.

Job card and job costing fields

The Job card on a signed quote (actual costs, photos, public profile tick), crew and time changes, and the Field work job-costing settings.

Contractor Hub → Jobs (signed work and job costing) → open a job, or open a signed quote. The **Job** card appears on the quote after it is signed. Crew and time changes are in **Field work**. Cost settings are in Field work → **Settings** (owner only).

A job is a signed quote. You record what you really spent so VisionScaper can compare it with the estimate and show actual gross profit. The job status itself is changed with the status-line button at the top, not on this card.

Before you start

- Your labor rate and overhead % come from Settings → Costs and markups (placeholders until you set them).

Fields

Job card (signed quote)

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Materials $ (`actuals.material`)	Actual material spend so far. The card shows the estimate beside it.	Total dollars, e.g. 1450.	0
Crew hours (`actuals.labor_hours`)	Actual labor hours; multiplied by your labor rate for cost.	Hours, e.g. 32.	0
Equipment $ (`actuals.equipment`)	Actual equipment cost.	Dollars.	0
Subcontractors $ (`actuals.sub`)	Actual subcontractor cost.	Dollars.	0
Disposal & delivery $ (`actuals.disposal`)	Actual dump and delivery cost.	Dollars.	0
Other $ (`actuals.other`)	Anything else. No estimate is shown for it.	Dollars.	0
Actual cost totals (read-only)	Estimated cost, Actual cost so far (includes your overhead %), Variance (red when over), Actual gross profit with percent (red under 25%), Hours est / actual.	Nothing to enter.	
Finished photos / Add photo (`job.photos`)	Pictures of the finished job; the x button removes one.	Add after pictures.	
Show this job (design + finished photo) on my public profile (`job.showcase`)	Includes the job in your public contractor profile showcase.	Tick only if the customer is fine with it.	Off
Save job	Saves actuals, photos and the showcase tick.		
Ask for a review	Starts a review request for this customer.		
Schedule a visit	Opens the visit form.		

Field work: Crew & time on a job

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Crew chips (Save crew) (`emps`)	Choose who works this visit; they are told when you press Save crew.	Tap names to toggle.	
Change the time: Start / End (`start`, `end`)	Moves the job.	Pick new start and end.	Current times
Tell the customer (Change the time) (`notify`)	Also notifies the customer of the move. Assigned employees are always told.		Off
Move job	Saves the new time.		

Field work > Settings > Jobs and Job costing (owner only)

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
A job is "late" after (minutes) (`overdue_minutes`)	How long after its start time an unstarted job counts as late.	Minutes.	30
Crew-finished jobs wait for a manager's approval (`require_approval`)	Finished jobs need approval.		Off
A "before" photo is required to finish a job (`require_before`)	Crew cannot finish without a before photo.		Off
An "after" photo is required to finish a job (`require_after`)	Same for after.		Off
Count materials (`materials_basis`)	Whether job cost counts materials used or bought.	Pick one. Choices: Used on the job; Bought for the job.	Used on the job

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Show an overhead allocation (`include_overhead`)	Adds your overhead % as a line in job cost.		Off
Warn when labor passes the estimate by (%) (`over_budget_pct`)	Alert threshold for hours over estimate.	Percent.	10
Your own cost per hour ($) (`owner cost_rate`)	Cost rate for hours you work. Blank uses the company labor rate.	e.g. 45.00.	Blank
Save settings	Saves the Field work settings (also the time, alerts and activity settings on that screen).		

Steps

1. Open the signed job and scroll to the **Job** card.
2. Under **Job costing - actual costs** type each actual as you learn it.
3. Watch the **Variance** and **Actual gross profit**.
4. Add **Finished photos**; tick the showcase box if allowed.
5. Press **Save job**.
6. To reassign crew or move the time, use Field work → job → **Crew & time**.
7. Owners: set the late rule, photo rules and over-budget % in Field work → **Settings** and press **Save settings**.

If something goes wrong

- If Save job fails with a message, it was refused by the website; nothing is saved.
- The status on the card cannot be edited. Use the button on the status line at the top.

Calendar visit and booking form

Every box on the Schedule a visit pop-up: customer, type, date, length, crew, status, service block and repeats.

Contractor Hub → Calendar → tap a day or **Add** (or the **+** menu → Visit, or **Schedule a visit** on a job). Tapping an existing visit opens the same pop-up titled **Visit**.

A visit is any calendar entry: a site visit, a job day, maintenance, a meeting or time off. Saving puts it on the customer's VisionScaper calendar (if they have an account), sends reminders on your schedule, and shows it to assigned employees in My work.

Before you start

- Add employees first in Field work → Team so you can assign them.

Fields

Main boxes

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Customer (`client`)	Optional customer. Picking one fills the address and puts the visit on their calendar. Hidden when the visit starts from a quote.	Type a name, phone or address.	
Type (`kind`)	Kind of appointment. Used in the calendar and for checklists that attach to visit kinds.	Pick one. Choices: Site visit; Consultation; Estimate walk-through; Job day; Maintenance visit; Follow-up visit; Meeting; Door-to-door; Time off / blocked; Other.	Site visit
What (`title`)	Short name; as you type you can pick a service template from suggestions, which prefills the service block.	e.g. Patio install - day 1.	
Service (block) (`svc`)	Optional service for this visit (template, previous job or typed). See the service block rows below.	Press Add service.	
Date (`date`)	Day of the visit.	Pick a date.	Tomorrow
Start (`time`)	Start time.		8:00 AM
Length (`dur`)	How long it lasts; end time = start + length.	Pick one. Choices: 1 hour; 2 hours; 3 hours; 4 hours; 6 hours; Full day (8 h); 10 hours.	4 hours
Status (`status`)	Where the visit is in its life. Choosing Done opens the Actual section.	Pick one. Choices: Scheduled; Confirmed with customer; En route; Arrived; In progress; Paused; Blocked; Awaiting approval; Needs follow-up; Done; Cancelled.	Scheduled
Where (`location`)	Visit address.	Leave blank to use the property address.	Property address
Who's working (`assignees`)	Real assignments; they see the visit in My work with directions, checklist and time clock. "Me" is you.	Tap names to toggle.	Empty
Crew (names) (`crew`)	Free-text crew names; only shown when you have no employees listed.	Names separated by commas.	
Notes for the crew (not shown to the customer) (`notes`)	Notes on the crew sheet.	e.g. gate code, where to park.	
Tell the customer... (`notify`)	On a new visit: tell the customer now. On an existing one: tell them if the time changes or it is cancelled.		On
Save visit	Saves and shows what happened (customer told, on their calendar, any automatic steps).		
On our way	Existing future visit with a customer: sends an "On our way" message.		
Job card / Tell the customer / Send crew sheet / Crew checklist link / Delete	Existing visits only: open the job card; notify the customer; email or text the crew sheet to addresses you type; copy the crew link; delete with Undo (the customer is told only after the Undo time).		
Measure property / Plan this day's route / Ask for a review	Shortcuts shown for visits with a customer.		

Service block (inside the visit)

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Quantity (units) (`est.qty`)	Shown for per-unit and tiered services; recalculates price. Measuring the property fills it.		From property measurements when available

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Price for this visit ($) (`est.price`)	Price for this visit; typing it fixes the price.	Dollars.	Calculated from the template
Duration (hours) (`duration`)	Changes the visit Length.	Hours, steps of 0.25.	Template value
Crew size (`crew`)	People on the visit.	Whole number.	Template value
Scope of work (`scope`)	One line each.		
Employee instructions (crew sheet - no prices) (`instructions`)	Shown on the crew sheet without prices.		
Completion checklist items (+ Add item) (`checklist`)	Crew tick these off from the crew-sheet link.	One item at a time.	
Labor hours (crew total) - Actual (`actual.labor_hours`)	Real hours; saved apart from the estimate.		
Materials ($) - Actual (`actual.materials`)	Real material cost (needs cost-viewing rights).		
Time on site (hours) - Actual (`actual.duration`)	Real time on site.		
Other costs ($) - Actual (`actual.other`)	Other real costs (needs cost-viewing rights).		
Repeats (every / more visits / until) (`repeat`)	New visits of weekly, biweekly, monthly or per-visit services can repeat. Choose Doesn't repeat, Every week, Every 2 weeks or Every month, then how many more visits, or an end date. Visits outside the season are skipped.	Example: Every week for 10 more visits.	Doesn't repeat; 10
Add service / Change service / Remove / Save as template / Update template	Manage the service block. A done visit's service record is frozen.		

Steps

1. Press a day on the calendar (or **+** → Visit).
2. Pick the **Customer** (optional) and **Type**.
3. Type **What**; pick a template suggestion if one fits.
4. Set **Date**, **Start**, **Length** and **Status**.
5. Check **Where**.
6. Tap the people under **Who's working**.
7. Add **Notes for the crew**.
8. Leave **Tell the customer** ticked if they should hear about it.
9. Press **Save visit**. For a repeating service, set **Repeats** before saving.

If something goes wrong

- A red message at the bottom is the website refusing the save; fix what it says.
- If the customer asked to reschedule, a yellow line shows their note; change the date and they are asked to confirm.
- Texts need text messaging set up; otherwise only email goes.

Invoice form: every box

The New invoice / Edit invoice pop-up: customer, type, dates, repeats, lines, discount, tax, notes, reminders and sending.

Contractor Hub → Invoices → **New invoice** (or the **+** menu → Invoice, or a button on the quote's status line). Paid and void invoices open read-only. The look of the invoice is set in Settings → Invoice design.

You write the invoice on the left and see exactly what the customer gets in a live preview on the right. Deposits are made automatically when a quote is signed; use this form for partial, final, recurring or other invoices.

Before you start

- To let customers pay by card or bank, connect Stripe in Settings → Get paid online (key guide: get-stripe-keys).

Fields

Main

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Customer (`client`)	Who is billed. Locked when the invoice comes from a quote.	Type a name and pick it.	
Type (`kind`)	Kind of invoice.	Pick one. Choices: Deposit; Progress; Final; Recurring / maintenance; Other.	Final
Title (`title`)	Shown on the invoice and in lists.	e.g. Spring clean-up - final payment.	
Invoice date (`date`)	Date printed on the invoice.		Today
Due (`due`)	Payment due date. Quick buttons set it from the invoice date.	Pick a date or press a terms button (due on receipt, Net 7, Net 15, Net 30).	Date + your default net days
Repeats (`recur`)	Makes a repeating invoice. Choosing a repeat while Type is Final changes Type to Recurring.	Pick one. Choices: One time; Every week; Every 2 weeks; Every month; Every 3 months; Every year; Custom....	One time
Every (number + unit) (`every`)	Only for Custom: how often.	e.g. 6 weeks. Units: days, weeks, months, years; number 1-365.	6 weeks

Lines

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Item or service (`name`)	What you are billing.		
Quantity (`qty`)	How many.		1
unit (`unit`)	Unit label; only if your Invoice design shows the unit column.		
Rate (`rate`)	Price per unit; line amount = quantity x rate.	Dollars.	0
Details (optional) - shown under the line (`desc`)	Extra words under the line.		
Service date (`date`)	Only if your design shows the date column.		
Taxable (`taxable`)	Shown when sales tax % is above 0; unticked lines are not taxed.		On
Move up / Remove line / + Add line / Add service	Reorder, delete, add a blank line, or add a line from a service template (a billing frequency sets Repeats).		

Totals

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Discount (amount + $ or %) (`discount.value`, `discount.type`)	Takes a dollar amount or percent off the subtotal.	e.g. 10 and %.	0 / $
Discount label (`discount.label`)	Name for the discount on the invoice.	e.g. Loyal customer discount.	
Sales tax % (`taxPct`)	Tax rate for this invoice; applied to taxable lines after the discount.	e.g. 6.35. (The default comes from Invoice design.)	Your Invoice design default

Custom fields, notes, payment instructions & terms (arrow section)

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Custom fields: Label / Value (`fields[]`)	Extra lines such as PO number. + Add a field adds one.	Label: PO number; Value: 4417.	From Invoice design
Notes (`notes`)	Anything the customer should know. Blank uses the design default.		

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
How to pay (`payment`)	Payment instructions text.	e.g. Checks payable to ...	Design default
Terms (`terms`)	Payment terms.		Design default
Thank-you message (`thanks`)	Closing line.		Design default

Reminders & messages (arrow section)

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Reminders (`remind`)	Choose your default plan, a custom plan for this invoice, or none.	Pick one. Choices: My default plan; Custom for this invoice; No reminders.	My default plan
Reminder row: tick, days, before/on/after due, email/text/both (`reminders[]`)	One row per reminder. "on the due date" hides the days box. Text and Both warn if text messaging is not set up.	e.g. 3 days after due by email.	From Invoice design
Edit message: Email subject / Email / Text message (`subject, email, sms`)	Wording of that reminder. Tap the code chips to insert {customer_first_name}, {customer_name}, {invoice_number}, {invoice_title}, {invoice_amount}, {invoice_due_date}, {days_late}, {days_until_due}, {invoice_link}, {company_name}, {contractor_name}. Texts add "Reply STOP" and never go out overnight.		
Send me a test / + Add a reminder / remove	Sends the reminder to you, adds a new one (10 days after due, email) or removes one.		

Actions

Field (exact label)	What it does for VisionScaper	What to enter and example	Default / notes
Save draft	Saves without sending. Needs a customer.		
Save & send / Save & send again	Asks how to send, then sends.		
Send the invoice: Send by (`channel`)	Email, Text or Both (text needs text messaging and a plan that includes it).	Choices: Email; Text; Both.	Email
Send the invoice: Message (optional) (`message`)	Your own wording instead of the usual message; merge tags like {customer_first_name} and {invoice_link} work.		
Copy link / Print-PDF / Mark paid / Void	Copy the pay link; print; record a payment ("Paid how?" box such as cash, check #, Venmo); void (you must write a reason of at least 3 characters, which stays in the log).		

Steps

1. Open **New invoice** and choose the **Customer**.
2. Pick the **Type**, type a **Title** and check the dates; use a terms button for **Due**.
3. Fill the lines: item, quantity, rate. Use **Add service** for template lines.
4. Add a **Discount** and the **Sales tax %** if needed.
5. Open the arrow sections to add custom fields, notes, payment instructions, terms or a thank-you.
6. Choose a reminder plan under **Reminders & messages**.
7. Watch the live preview, then press **Save draft** or **Save & send**.
8. To record a payment received outside VisionScaper use **Mark paid**.

If something goes wrong

- "Choose the customer" means the typed name was not picked from the list.
- "Set how often the custom repeat goes out." Fill the Every number.
- Paid and void invoices cannot be edited.
- Text options are greyed out until text messaging is set up.

Get your API keys

Step-by-step: how to create each key, secret and token you paste into VisionScaper.

API keys: start here, every key and where it goes

One table of every key, secret and token VisionScaper can use, what each one turns on, where you paste it and the guide that shows how to get it.

You only need the keys for the features you want to switch on. VisionScaper works without the rest. Each guide below starts from signing up for the service, tells you which buttons to press, and ends with exactly which VisionScaper box to paste the result into.

Every key at a glance

Service	What it unlocks in VisionScaper	Where you paste it	Step-by-step guide
Google Maps	Address search and maps on forms and the Designer	Settings → VisionScaper → Maps	How to get it
Google sign-in	"Continue with Google" for homeowners and contractors	Settings → VisionScaper → Customer accounts	How to get it
Google Contacts	Import and sync contacts in the Hub	Hub → Settings → Connected apps	How to get it
Facebook login	"Continue with Facebook"	Settings → VisionScaper → Customer accounts	How to get it
fal.ai	AI design, voice notes and walk estimates, and the vision model	Settings → VisionScaper → AI	How to get it
Black Forest Labs	FLUX image generation	Settings → VisionScaper → AI	How to get it
Pl@ntNet	Plant identification from photos	Settings → VisionScaper → AI	How to get it
Vision model	Photo understanding (uses the fal.ai key)	Settings → VisionScaper → AI	How to get it
Expo	Push notifications to the phone app	Settings → VisionScaper → Mobile app	How to get it
Retell AI / Vapi / Bland	The voice-agent engine for the AI Receptionist	Settings → VisionScaper AI Receptionist → Keys	How to get it
ElevenLabs / Cartesia / Deepgram	Voices and speech for the AI Receptionist	Settings → VisionScaper AI Receptionist → Keys	How to get it
Stripe	Card and bank payments, plans and Connect	Settings → VisionScaper and Plans	How to get it
Twilio	Text messages and phone numbers	Settings → VisionScaper Messaging	How to get it
Telnyx	Text messages and phone numbers (alternative)	Settings → VisionScaper Messaging	How to get it
Postmark / Resend / SendGrid / Amazon SES	Sending email	Settings → VisionScaper Messaging	How to get it
QuickBooks Online	Accounting sync	Hub → Settings → Connected apps	How to get it
Xero	Accounting sync	Hub → Settings → Connected apps	How to get it
Zapier and access keys	Connect other tools	Hub → Settings → Zapier & API keys	How to get it

General rules for keys

1. Treat every key like a password. Paste it only into the box named in the guide.
2. A blank key box on a VisionScaper settings screen means "keep the key already saved", so you cannot erase a saved key by emptying the box.
3. Prefer test or sandbox mode first when the provider offers it, then switch to live.
4. Provider screens change often. Where a guide says a step could not be confirmed, look for the closest matching button.
5. Provider prices are set by the provider and are not listed here.

Get your Google Maps keys (address autocomplete, 3D, route planner)

Create a Google Cloud project, turn on billing and the right APIs, make two restricted keys and paste them into VisionScaper.

VisionScaper can use Google for address suggestions, "Explore in 3D" and the Route planner. These features are optional. Without a key, addresses are suggested from OpenStreetMap instead.

What VisionScaper uses

VisionScaper field (Settings → VisionScaper)	Used for	Google API to enable (named in the field's help text)
Google Maps API key (optional), `maps_key`	Address autocomplete and "Explore in 3D" in the browser	Places API (New) and Maps JavaScript API
Google server key for the Route planner (optional), `maps_server_key`	Driving distances, nearby restaurants and gas prices, looked up from your server	Routes API and Places API (New)

If the server key is empty, VisionScaper uses the first key for the Route planner too.

Before you start

- A Google account you will keep for the business.
- A payment card. Google Maps Platform needs billing turned on. Pricing and any free usage are set by Google and change; read Google's current pricing page. This article does not quote prices.
- Your website address, for example `https://yoursite.com`.
- Your web host's server IP address (ask your host) if you want the server key locked to your server.

Steps

1. Sign in at the Google Cloud Console (console.cloud.google.com).
2. On the project selector, click **Create Project**. Name it something like "VisionScaper" and create it.
3. Make sure billing is enabled for that project. Google says a billing account must be set up first. Follow the on-screen prompts to add one.
4. Open the **Maps API Library** page (Google Maps Platform). Click each API below. If the button says **ENABLE**, click it. If it says **MANAGE**, it is already on. - Places API (New) - Maps JavaScript API - Routes API (only if you use the Route planner)
5. Go to **Google Maps Platform → Credentials**. Click **Create credentials → API key**. Click **Close** on the "API key created" box. This is your website key.
6. Open the key and restrict it before using it:
7. Under application restrictions choose a website (HTTP referrer) restriction.
8. Add your site with the scheme, for example `https://yoursite.com` (Google also accepts wildcards for subdomains, such as `https://*.yoursite.com`).
9. Under **API restrictions** choose **Restrict key** and select Places API (New) and Maps JavaScript API.
10. Save.
11. Optional: make a second key for the Route planner. Create another API key, restrict it by IP address (your server's IPv4 or IPv6 address), and under API restrictions select Routes API and Places API (New). Save.
12. In WordPress go to **Settings → VisionScaper**.
13. Paste the first key into **Google Maps API key (optional)**. Paste the second into **Google server key for the Route planner (optional)**.
14. Click the Save button at the bottom of the page.

Tips

- VisionScaper sends your website address as the referrer when it calls Google from the server, which is why a website-restricted key still works for the first key. A key restricted only by IP will not work for the browser features.
- Never share the keys in emails or screenshots. If one leaks, create a new key in Credentials and delete the old one.
- Watch your usage on the Google Cloud billing page so there are no surprises.

If something goes wrong

- **Suggestions still come from OpenStreetMap:** the key is empty, saved wrongly, or Places API (New) is not enabled. Re-check steps 4 and 9.
- **"Explore in 3D" does not appear or the map will not load:** confirm Maps JavaScript API is enabled and that your site address is in the referrer list exactly as visitors see it (with or without `www`).

- **Route planner shows estimates only:** the Routes API may be off, or the server key's IP restriction does not match your host's current IP.
- **Billing errors:** open Billing in Cloud Console and confirm the project is linked to an active billing account.

Sources

- https://developers.google.com/maps/get-started (read)
- https://developers.google.com/maps/documentation/places/web-service/cloud-setup (read; high-level only)
- https://developers.google.com/maps/api-security-best-practices (read)
- Field names and API names: VisionScaper plugin settings code.

Unverified: exact Cloud Console button names for choosing the restriction type (the pages read describe the restrictions but not the screen labels), and the exact wording on the key's edit screen.

Get your Google sign-in Client ID and secret

Create a Google OAuth web client so customers can use "Sign in with Google" on your VisionScaper site.

"Sign in with Google" lets customers create a VisionScaper account with their Google account. You need an OAuth client from Google Cloud.

What VisionScaper uses

Item	Value in VisionScaper
Fields	**Google Client ID** (`google_id`) and **Google Client secret** (`google_secret`) under Settings → VisionScaper → Customer accounts → Sign in with Google
Scopes requested	`openid email profile`
Authorized redirect URI	Your home address with `?dreamscaper_oauth=google` added, for example `https://yoursite.com/?dreamscaper_oauth=google`. The settings page prints the exact address for your site; copy it from there.
Account rule	VisionScaper only signs a person in if Google says their email is verified.

The sign-in button appears only when both fields are filled.

Before you start

- A Google account and access to the Google Cloud Console.
- Your privacy policy page address.
- Your site must use `https`. Google requires https for redirect addresses (localhost is the exception).

Steps

1. Open Settings → VisionScaper in WordPress and scroll to **Sign in with Google**. Keep this tab open to copy the redirect address.
2. In a new tab open Google Cloud Console → APIs & Services → Credentials. Create a project if asked (the same project can serve Maps and Contacts).
3. Set up the consent screen. Google now calls this area the Google Auth Platform. On its overview page click **Get started**.
4. **App Information:** enter an app name (use your business name; avoid names that look like Google's) and a **User Support Email**, then add **Contact Information** emails.
5. **Audience:** choose **External**.
6. Complete the **Branding** details you want customers to see, including your privacy policy address.
7. Finish the setup.
8. Open the **Clients** page and click **Create Client**. Choose **Web application**.
9. Under authorized redirect URIs, add the address copied from VisionScaper. It must match exactly: scheme, capitals and any slash.
10. Click **Create**. Google shows the client secret once. Copy the Client ID and the Client secret now.
11. Back in WordPress paste them into **Google Client ID** and **Google Client secret**.
12. Click Save. Log out and test from a private browser window: choose Sign in with Google on your VisionScaper page.

Tips

- Sign-in uses only basic scopes (`openid email profile`), which are not the sensitive kind. Google still asks production apps to go through its verification process; track it in Google's Verification Center. In Google's testing state only test users you list can sign in. Check Google's current rules on publishing status.
- The settings page tells you to publish the app. Do this once you are ready for real customers.
- Use the same project as Google Contacts so you manage one place.

If something goes wrong

- **redirect_uri_mismatch:** the address in Google differs from the one VisionScaper prints. Copy it again, character for character.
- **Button missing:** one of the two fields is empty.
- **"Access blocked" or "unverified app":** the app is still in testing or awaiting verification. Add yourself as a test user or finish publishing.
- **"That sign-in link expired":** the sign-in took over 15 minutes; try again.

Sources

- https://support.google.com/cloud/answer/15544987 (read: Google Auth Platform setup)
- https://developers.google.com/identity/protocols/oauth2/web-server (read: Clients page, redirect URIs, secret shown once)

- Field names, scopes and redirect address: VisionScaper plugin code.

Unverified: exact screen text for the Audience and Branding fields beyond what the pages above list; whether Google lets you skip the consent-screen publishing step for basic scopes today (check Google's page).

Get your Google Contacts Client ID and secret

Turn on the People API and create an OAuth client so VisionScaper can sync customers with Google Contacts.

The Google Contacts connection imports and exports customers between VisionScaper and your Google Contacts. It uses its own OAuth client, separate from sign-in, though you can use the same Google Cloud project.

What VisionScaper uses

Item	Value
Where	Contractor Hub → Integrations → Google Contacts card. Fields **Client ID** and **Client secret**.
API to enable	People API
Scopes requested	`openid email https://www.googleapis.com/auth/contacts`
Authorized redirect URI	`https://yoursite.com/wp-json/dreamscaper/v1/oauth/google/callback`. The card shows the exact address with a Copy button. (Sites without pretty links use the `rest_route` form; copy from the card.)
Other fields	**How data moves**, **Only import contacts with this Google label**, **Update automatically every hour**, and the deletions checkbox

Before you start

- A Google account and Cloud Console access.
- Your VisionScaper Contractor Hub open on the Integrations tab, to copy the redirect address.

Steps

1. In Cloud Console open Library, search for People API (the card links to it) and click **Enable**. Use your sign-in project or a new one.
2. Open the Google Auth Platform consent setup (see the sign-in guide for the screens). Choose **External** and add your email.
3. Under **Data Access** add the scope ending `/auth/contacts`. (The VisionScaper card tells you to add this scope; the exact Data Access screen text was not confirmed.)
4. Set the publishing status to **In production**. VisionScaper's card says that otherwise Google disconnects you every 7 days.
5. Open **Clients → Create Client → Web application**. Add the redirect address copied from the VisionScaper card. Click **Create** and copy the Client ID and the secret (shown once).
6. In VisionScaper paste both, choose **How data moves** (import only, export only, or both ways), then click **Save settings**.
7. Click **Connect Google Contacts** and approve. Google may warn the app is unverified; the card says to click Advanced and continue, since it is your own app.

Tips

- Exported customers go into a label called "VisionScaper Customers".
- Leave deletions off at first; it is the safer choice.
- Disconnect removes access and deletes the saved keys. Customers stay in both places.

If something goes wrong

- **Disconnects every week:** the app is still in Testing. Set it to In production.
- **redirect_uri_mismatch:** recopy the address from the card.
- **Needs reconnect warning:** press Reconnect.
- **API not enabled error:** enable the People API in the same project as the client.

Sources

- https://developers.google.com/people/v1/getting-started (read; does not list the contacts scope)
- https://developers.google.com/identity/protocols/oauth2/web-server (read)
- https://support.google.com/cloud/answer/15544987 (read)
- Scopes, redirect and field labels: VisionScaper plugin code.

Unverified: contacts scope being "sensitive" and the verification path it triggers (not stated on pages read); exact wording of the Data Access screen.

Get your Facebook App ID and App secret

Create a Meta app with Facebook Login so customers can sign in to VisionScaper with Facebook.

"Sign in with Facebook" needs an app on Meta for Developers.

What VisionScaper uses

Item	Value
Fields	**Facebook App ID** (`facebook_id`) and **Facebook App secret** (`facebook_secret`), Settings → VisionScaper → Customer accounts → Sign in with Facebook
Permissions requested	`email` and `public_profile`
Valid OAuth Redirect URI	`https://yoursite.com/?dreamscaper_oauth=facebook` (copy the exact one from the settings page)
Graph version in code	v19.0

If a Facebook account has no email, VisionScaper creates a placeholder address and the app asks for a real one.

Before you start

- A personal Facebook account to register as a developer.
- Your privacy policy page address, and a page explaining how customers delete their data. VisionScaper suggests saying they can delete their account in VisionScaper → My account → Delete account.

Steps

1. Go to developers.facebook.com/apps/creation/ and log in.
2. **App details:** enter an app name and contact email. Click **Next**.
3. **Use cases:** pick "Authenticate and request data from users with Facebook Login". Click **Next**.
4. **Business:** pick a portfolio or "I don't want to connect a business portfolio yet". Click **Next**, review requirements, then **Go to dashboard**.
5. Open Facebook Login, then Settings. In the Client OAuth Settings section, put the redirect address in **Valid OAuth redirect URIs**. Save.
6. Open App settings, Basic. Copy the **App ID** and show the **App secret**. Add the privacy policy URL and a data-deletion instructions URL here (VisionScaper's own instructions say this goes in Basic).
7. Switch the app to **Live** using the app mode toggle in the App Dashboard toolbar. Meta advises doing this only when development and any App Review are finished, and test data becomes visible to everyone on switching.
8. In WordPress paste the two values into the Facebook fields and Save.
9. Test in a private window with a Facebook account that has no role on the app.

Tips

- In Development mode only people with a role on the app can sign in.
- Keep the secret private. Reset it in Meta's dashboard if exposed, then update VisionScaper.

If something goes wrong

- **URL blocked / redirect error:** the Valid OAuth redirect URI does not exactly match.
- **Only you can log in:** the app is still in Development mode.
- **Button missing:** App ID or secret field is empty.
- **No email returned:** the user may have no email or declined; they will be asked for one.

Sources

- https://developers.facebook.com/docs/development/create-an-app/ (read)
- https://developers.facebook.com/docs/facebook-login/guides/advanced/manual-flow (read)
- https://developers.facebook.com/docs/development/build-and-test/app-modes (read)
- Field names, permissions, redirect: VisionScaper plugin code.

Unverified: where Meta's current dashboard puts the App secret "Show" button and the privacy/data-deletion fields in Basic settings (Meta's pages read do not say; the locations come from VisionScaper's own settings text). Meta's current Graph version is higher than v19.0 in the code; whether v19.0 still works was not checked.

Sign in with Apple (not included in VisionScaper)

VisionScaper 2.51.0 offers Google and Facebook sign-in only; there are no Apple keys to enter.

We searched the VisionScaper 2.51.0 plugin code for Apple sign-in settings, redirect addresses and keys and found none. The only social sign-in options are Google and Facebook.

What this means for you

- There is no Apple field in Settings → VisionScaper, so nothing to paste.
- Customers without Google or Facebook can still sign up with their email.
- Do not create Apple developer keys for VisionScaper; they would have nowhere to go.

Steps

1. Set up Google using the guide get-google-sign-in-keys.
2. Set up Facebook using get-facebook-login-keys if you want it.

If something goes wrong

If an app-store rule requires Apple sign-in for your own mobile app, check with whoever publishes that app. This was not verified in the plugin code.

Sources

VisionScaper plugin source search only (no provider pages needed).

Get your fal.ai API key

Create a fal.ai key and paste it into the fal.ai API key field in VisionScaper.

fal.ai is the service behind VisionScaper's AI Smart Select, garden-item and material identifying, and the AI text features (vision model, voice-note summaries, drafted quotes). You paste one key into VisionScaper.

Before you start

- A fal.ai account (create one at fal.ai).
- You must be a WordPress administrator.
- Billing and pricing on fal.ai are set by fal.ai. Check their site; this guide does not quote prices.

Steps

1. Sign in to fal.ai and open the keys page: fal.ai/dashboard/keys.
2. If you work under a team, choose the team in the top-left corner of the dashboard first. The key belongs to the account that creates it.
3. Click **Create Key** and give it a name you will recognise, such as "VisionScaper site".
4. Choose a permission preset. fal's docs recommend starting with **API**, which can call any model.
5. Copy the key straight away. fal warns you will not be able to see it again.
6. In WordPress go to **Settings → VisionScaper**, then the **AI** section.
7. Paste the key into **fal.ai API key**.
8. Click the save button at the bottom of the page.

Tips

- Store the key in a password manager too.
- Make a separate key per site so you can delete one without breaking the others.

If something goes wrong

- AI tools say they are "busy" or "not switched on": the field is empty, or the key was pasted with spaces. Paste it again.
- You lost the key: create a new one on the same page, paste it into VisionScaper, then delete the old one on fal.ai.
- Calls fail after working before: check your fal.ai billing or balance. (Not verified how fal.ai reports this.)

Sources

- https://fal.ai/docs/documentation/setting-up/authentication/index.md (read 2026-10-15)

Plugin check: the field label "fal.ai API key" (option `fal_key`) is in the AI section of the VisionScaper settings; the plugin sends it as an `Authorization: Key ...` header.

Get your Black Forest Labs (FLUX) API key

Create a Black Forest Labs key and credits, then paste it into VisionScaper.

Black Forest Labs makes the FLUX image model. Its key turns on VisionScaper AI and the AI Erase, Make it real, and Season & Light tools in VisionScaper.

Before you start

- A Black Forest Labs account at dashboard.bfl.ai. You must confirm your email before you can log in.
- Credits on that account. Prices are set by Black Forest Labs; check their dashboard.
- WordPress administrator access.

Steps

1. Go to dashboard.bfl.ai and register. Confirm the email they send.
2. Log in. You land on the BFL Dashboard.
3. Click **Add Key** and give it a descriptive name.
4. Copy the key. BFL says you can view it in the dashboard later.
5. Add credits: click **Add Credits**, choose an amount and pay through Stripe. BFL says credits are available right after payment. (Credits page: API → Credits.)
6. In WordPress go to **Settings → VisionScaper**, **AI** section.
7. Paste the key into **Black Forest Labs API key**.
8. Leave **BFL model** as it is unless support tells you otherwise (the field's own hint says to leave it as `flux-2-klein-4b`).
9. Click save.

Tips

- Never put the key in a web page or share it in email.
- The usage page on the BFL dashboard shows your balance and usage.

If something goes wrong

- "VisionScaper AI isn't switched on yet": the key field is empty.
- Generations fail: check you still have credits.
- Key rejected: create a new key and paste it again.

Sources

- https://docs.bfl.ai/quick_start/create_account (read 2026-10-15)
- https://docs.bfl.ai/quick_start/managing_account (read 2026-10-15)

Plugin check: field "Black Forest Labs API key" (`bfl_key`) and "BFL model" (`bfl_model`).

Get your Pl@ntNet API key

Create a Pl@ntNet account, copy your private key, and paste it into VisionScaper.

Pl@ntNet identifies plants and weeds from photos. VisionScaper uses it first when it is set, and falls back to the fal.ai vision model if it is unsure or the key is missing.

Before you start

- A Pl@ntNet account at my.plantnet.org.
- WordPress administrator access.
- Free quotas and limits are set by Pl@ntNet; read them on their site. (The quota was not confirmed on the docs page read for this guide.)

Steps

1. Go to my.plantnet.org and create an account.
2. Open your API key page: my.plantnet.org/settings/api-key. Generate your private key if one is not there yet.
3. Copy the key.
4. Leave key restrictions alone for VisionScaper. The key is used from your website's server, not from a browser. (Pl@ntNet's "Authorized IPs" is an optional restriction; if you set it, it must include your web host's address. Not verified for your host.)
5. In WordPress go to **Settings → VisionScaper**, **AI** section.
6. Paste the key into **Pl@ntNet API key**.
7. Click save.

Tips

- Pl@ntNet's responses include a count of remaining requests, so you can see your quota in their dashboard or API.
- Without this key, Identify still works if the fal.ai key is set.

If something goes wrong

- Wrong or no match: VisionScaper then tries the fal.ai vision model if that key is set.
- Nothing identifies: check both keys are saved.

Sources

- https://my.plantnet.org/doc/getting-started/introduction (read 2026-10-15)

Plugin check: field "Pl@ntNet API key" (`plantnet_key`); sent to my-api.plantnet.org as the `api-key` parameter.

Set up the vision model (no separate key)

VisionScaper's vision model runs through fal.ai: you only need the fal.ai key plus a model name.

VisionScaper has no separate key from a "vision model provider". The vision model runs through fal.ai's `any-llm` endpoint, so it uses your fal.ai key. The only extra field is the model name.

Before you start

- Get your fal.ai key first: see **Get your fal.ai API key**.

Steps

1. Make sure the **fal.ai API key** is saved under **Settings → VisionScaper**, **AI** section.
2. Find the field **Vision model (fal any-llm)** just below it.
3. Leave the default, `google/gemini-2.5-flash`, unless you have a reason to change it.
4. To use another model, type the model name exactly as fal.ai lists it. (Which names fal accepts was not verified for this guide; check fal.ai's model page.)
5. Click save.

Tips

- This model is used for identifying items, marketing and CRM text, community checks, and quote drafts, so a wrong name affects several features.
- Voice-note summaries and drafted quotes in the phone app each use one AI call and have their own on/off checkboxes.

If something goes wrong

- AI text features fail after changing the name: put back `google/gemini-2.5-flash`.
- Nothing works: the fal.ai key is missing.

Sources

- Plugin code: dreamscaper.php (defaults, settings labels), includes/ai.php
- https://fal.ai/docs/documentation/setting-up/authentication/index.md (read 2026-10-15)

Get an Expo access token (optional)

Create an Expo access token for push notifications, only needed if enhanced push security is on.

The VisionScaper phone app sends push notifications through Expo. The token is optional. You only need it if "enhanced push security" is turned on in your Expo project.

Before you start

- An Expo account and the project the phone app belongs to.
- Know whether enhanced push security is on. Expo says you enable it from the EAS Dashboard, and that when it is on, requests without a valid token are rejected with `UNAUTHORIZED`.

Steps

1. Sign in at expo.dev.
2. Open your Access tokens page: expo.dev/settings/access-tokens (Expo's docs name this page "Access tokens").
3. Create a token and copy it. The exact button names and whether the token is shown only once were not confirmed in Expo's docs; copy it immediately to be safe. (Unverified.)
4. In WordPress go to **Settings → VisionScaper**, the **Mobile app (push notifications)** section.
5. Paste it into **Expo access token (optional)**.
6. Click save.

Tips

- If enhanced push security is off, leave the field blank.
- A token can be revoked by deleting it on the Access tokens page.

If something goes wrong

- Notifications stop with an authorization error: the token is missing, wrong or revoked. Create a new one and paste it.

Sources

- https://docs.expo.dev/push-notifications/sending-notifications/ (read 2026-10-15)
- https://docs.expo.dev/accounts/programmatic-access/ (read 2026-10-15)

Plugin check: field "Expo access token (optional)" (`expo_access_token`); sent as a Bearer header to Expo's push service.

Get your Retell AI keys

Create a Retell API key, mark it as the webhook key, and paste the details into the AI Receptionist screen.

Retell AI is the default voice-agent service for the AI Receptionist. VisionScaper has three Retell fields: **Retell AI API key**, **Retell AI webhook secret**, and **Retell AI phone address (SIP)**.

Before you start

- A Retell AI account. Call rates are set by Retell; this guide does not quote them.
- WordPress administrator access.
- Know your webhook address: shown at the top of **Settings → VisionScaper AI Receptionist**, in the form `.../dreamscaper/v1/receptionist/webhook/ENGINE`. For Retell, ENGINE is `retell`.

Steps

1. Sign in to the Retell dashboard.
2. Go to **Settings** (under System), then **API Keys**.
3. Click **Add**, name the key, and save. Without **Restrict permissions** the key has full access; if you restrict it, it must be able to manage agents and make calls (Agent, Call, Phone and History groups). Which exact scopes VisionScaper needs was not verified.
4. Select the key and click **Set as Webhook Key**. Only one key can be the webhook key.
5. In WordPress go to **Settings → VisionScaper AI Receptionist**, **Keys**.
6. Paste the key into **Retell AI API key**.
7. For **Retell AI webhook secret** use the secret your Retell setup gives for signing webhooks. VisionScaper checks an HMAC-SHA256 signature in the `x-retell-signature` header with this value. Which Retell value matches this was not verified in Retell's docs; check their webhook documentation.
8. **Retell AI phone address (SIP)**: paste the SIP address of your Retell phone number if you use the carrier hand-off. The field name is from VisionScaper; where Retell shows it was not verified.
9. Save. A blank box keeps the saved value.

Tips

- Set the webhook address in Retell to the one shown on the VisionScaper screen, with `retell` at the end.
- Rotate by deleting the key in Retell, creating a new one, and pasting it.

If something goes wrong

- "The voice service isn't connected yet": the API key box is empty.
- Calls happen but nothing logs: the webhook secret or address is wrong.

Sources

- https://docs.retellai.com/accounts/manage-api-keys (read 2026-10-15)

Get your Vapi keys

Create a Vapi private API key and paste it into the AI Receptionist screen.

Vapi is an optional voice-agent service for the AI Receptionist, for more advanced setups. VisionScaper fields: **Vapi API key**, **Vapi webhook secret**, **Vapi phone address (SIP)**.

Before you start

- A Vapi account. Rates are set by Vapi.
- WordPress administrator access.
- Webhook address from the top of **Settings → VisionScaper AI Receptionist**, ending in `vapi`.

Steps

1. Open the Vapi dashboard: dashboard.vapi.ai/org/api-keys, then **API Keys**.
2. Use the **Private API Keys** section (VisionScaper runs on your server, so use a private key, never a public one).
3. Click **Add Key**, type a **Name**, and select **Create Private Token**.
4. Click **Copy ID** to copy the key. You can view it later with the eye icon.
5. In WordPress go to **Settings → VisionScaper AI Receptionist**, **Keys**.
6. Paste it into **Vapi API key**.
7. **Vapi webhook secret**: enter the secret you set for Vapi's server authentication. VisionScaper checks an HMAC-SHA256 signature in `x-vapi-signature`. How Vapi supplies this was not verified (Vapi's server-authentication page could not be read).
8. **Vapi phone address (SIP)**: paste your Vapi number's SIP address if used. Where Vapi shows it was not verified.
9. Save. A blank box keeps the saved value.

Tips

- Use separate keys for testing and live.
- Check a key: Vapi says a request to its assistant list with the key returns your assistants, and a 401 means the key is invalid.

If something goes wrong

- "The voice service isn't connected yet": key box is empty.
- 401 errors: the key was copied wrong, or it is a public key.

Sources

- https://docs.vapi.ai/security-and-privacy/api-keys.md (read 2026-10-15)
- https://docs.vapi.ai/server-url/securing-endpoints (UNREACHABLE)

Get your Bland keys

Where to find a Bland API key and which VisionScaper fields to fill. Dashboard steps are partly unverified.

Bland is an optional voice-agent service built for high-volume outbound calling. VisionScaper fields: **Bland API key**, **Bland webhook secret**, **Bland phone address (SIP)**.

> Warning: Bland's current docs describe getting a key through an agent onboarding flow and say keys can be revoked under Settings > API Keys. Direct dashboard creation steps were not found, so the steps below are unverified. Follow Bland's current instructions.

Before you start

- A Bland account at app.bland.ai. Rates are set by Bland.
- Webhook address from the top of **Settings → VisionScaper AI Receptionist**, ending in `bland`.

Steps

1. Sign in at app.bland.ai.
2. Look under **Settings > API Keys** for your key (Bland's docs say you can view and revoke keys there). Creating a new one: follow Bland's docs; not verified.
3. Copy the key. Bland says an onboarding-issued key is shown only once.
4. In WordPress go to **Settings → VisionScaper AI Receptionist**, **Keys**.
5. Paste it into **Bland API key**. VisionScaper sends it in an `authorization` header.
6. **Bland webhook secret**: enter the signing secret for your webhooks. VisionScaper checks an HMAC-SHA256 signature in `x-bland-signature`. Where Bland provides it was not verified.
7. **Bland phone address (SIP)**: only if you use it; not verified where Bland shows it.
8. Save. A blank box keeps the saved value.

Tips

- Bland's docs say a number is provided with their Agent Phone Plan; plans are set by Bland.

If something goes wrong

- "The voice service isn't connected yet": the key box is empty.
- Key rejected: revoke and create a new one per Bland's docs.

Sources

- https://docs.bland.ai/platform/connect-your-agent.md (read 2026-10-15)
- https://docs.bland.ai/welcome-to-bland (read; no key steps)
- https://docs.bland.ai/api-v1/get/authentication (UNREACHABLE)

Get your ElevenLabs key

Create an ElevenLabs API key and paste it into the AI Receptionist screen.

ElevenLabs supplies the receptionist's voice (the default voice layer). One VisionScaper field: **ElevenLabs key**.

Before you start

- An ElevenLabs account. Per ElevenLabs, creating personal keys requires a Full Seat. Plans and credits are set by ElevenLabs.

Steps

1. Open elevenlabs.io/app/settings/api-keys.
2. Create a new key. Optionally use **Expire After** (15 minutes to 30 days; default **Never**). Choose **Never** or a long date, or the receptionist stops speaking when it expires.
3. Leave scope, credit quota and IP restrictions off unless you know you need them. If you add an IP allowlist, it must include your web host's address; other IPs get a 403 error.
4. Copy the key. Whether it is shown again was not stated; copy it now.
5. In WordPress go to **Settings → VisionScaper AI Receptionist**, **Keys**.
6. Paste it into **ElevenLabs key** and save. A blank box keeps the saved value.

Tips

- Team accounts can use a service account key: profile icon → **Workspace settings** → **Service Accounts** tab. These keys do not expire.

If something goes wrong

- Voice previews fail: key wrong, expired, or out of credit.
- 403 errors: your IP allowlist excludes your web host.

Sources

- https://elevenlabs.io/docs/overview/administration/workspaces/api-keys (read 2026-10-15)
- https://elevenlabs.io/docs/api-reference/authentication (read 2026-10-15)

Get your Cartesia key

Create a Cartesia API key and paste it into the AI Receptionist screen.

Cartesia Sonic is an optional voice layer, described in VisionScaper as the fastest to respond. One field: **Cartesia key**.

Before you start

- A Cartesia account. Pricing is set by Cartesia.

Steps

1. Open play.cartesia.ai/keys and create an API key. Cartesia's docs link to this page but do not describe its buttons, so screen names are unverified.
2. Copy the key.
3. In WordPress go to **Settings → VisionScaper AI Receptionist**, **Keys**.
4. Paste it into **Cartesia key** and save. A blank box keeps the saved value.

Tips

- Cartesia keys can carry restrictions (scope, credit quota, IP allowlist) per their docs; keep them off unless needed.
- Never put the key in browser code.

If something goes wrong

- Voice fails: create a new key and paste it again.

Sources

- https://docs.cartesia.ai/get-started/make-an-api-request (read 2026-10-15)
- https://docs.cartesia.ai/get-started/authenticate-your-client-applications (read 2026-10-15)

Get your Deepgram key

Create a Deepgram API key and paste it into the AI Receptionist screen.

Deepgram Aura is an optional voice layer, described in VisionScaper as lowest cost. One field: **Deepgram key**.

Before you start

- A Deepgram account. Pricing is set by Deepgram.

Steps

1. Log in to the Deepgram Console.
2. Use the **Projects** drop-down at top left and choose your project.
3. Select **Settings**, then the **API Keys** view.
4. Select **Create a New API Key**.
5. Fill **Friendly Name (Comment)** (for example "VisionScaper"), choose **Permissions** (a role), set **Expiration** (choose never, or a date you will remember), optionally add a **Tag**, then select **Create Key**.
6. Copy the key secret. Deepgram shows it only now. Then select **Got it**.
7. In WordPress go to **Settings → VisionScaper AI Receptionist**, **Keys**.
8. Paste it into **Deepgram key** and save. A blank box keeps the saved value.

Tips

- Which role the key needs for voice (text-to-speech) was not verified; if calls fail, try a role with wider access.

If something goes wrong

- Lost the secret: create a new key.
- Stopped working: it may have expired.

Sources

- https://developers.deepgram.com/docs/create-additional-api-keys (read 2026-10-15)

Get your Stripe secret key

Find or create the Stripe secret key and paste it into VisionScaper so the site can take card payments.

VisionScaper uses one Stripe key on the server. That key powers extra AI credit sales, plan billing, and the Stripe Connect payments your contractors use to get paid by their customers. This article shows where to get it and where to paste it.

> Note: Follow Stripe's current screens. Stripe changes its dashboard from time to time. The steps below were checked against Stripe's documentation on 2026-10-15. Nothing here was tested on a live account.

Before you start

- A Stripe account with your business details finished.
- Someone who can receive Stripe's email or text verification code.
- Admin access to WordPress.

Steps

1. Sign in to the Stripe Dashboard.
2. Decide the mode. Stripe has a test environment (called a sandbox) and live mode. Test keys start with `sk_test_`. Live keys start with `sk_live_`. Use test first, then switch. See "Stripe test mode and live mode".
3. Open the **API keys** page in the Dashboard (`dashboard.stripe.com/apikeys`).
4. Click **Create secret key**.
5. Enter the verification code Stripe sends you by email or text. If the box does not continue by itself, click **Continue**.
6. Type a name in **Key name**, for example "VisionScaper website". Click **Create**.
7. Click the key value to copy it. Stripe says you cannot see a secret key again later in live mode, so paste it somewhere safe right away.
8. In the **Add a note** box, write where you saved it. Click **Done**.
9. In WordPress, go to **Settings → VisionScaper**. Find the section **Selling extra AI credits**.
10. Paste the key into the field **Stripe secret key**.
11. Click the save button at the bottom of the page.

What the key is used for in VisionScaper

Where	What happens
Selling extra AI credits	Customers pay on Stripe's secure checkout page.
Plan billing	Contractors start or change a subscription.
Contractor payments	Each contractor connects their own Stripe account (see "Set up Stripe Connect").

If the Stripe key is blank, a contractor who opens **Settings → Get paid online** sees that online payments are not set up on the website yet. A notice also appears in the admin when billing is on but Stripe is not connected.

Tips

- Stripe prefers restricted keys (`rk_...`) for new integrations because you choose exactly what they can do. VisionScaper's field is named "Stripe secret key". Whether a restricted key has enough permission for every VisionScaper feature is not verified in code, so start with a standard secret key unless Stripe or your developer tells you otherwise.
- Never email the key or paste it in chat.
- Use a name that tells you what the key is for, so you can remove it later.

If something goes wrong

- **"Payments are unavailable right now" on the site.** The key may be wrong, expired, or from the wrong mode. Create a new key and paste it again.
- **You lost the key.** Create another and expire the old one (see "Replace or rotate a Stripe key").
- **The Create button asks for a code you do not get.** Check the email address and phone number on your Stripe profile.

Sources

- Stripe, API keys: https://docs.stripe.com/keys (read 2026-10-15)
- Stripe, key best practices: https://docs.stripe.com/keys-best-practices (linked from the page above; not opened separately)

- VisionScaper field names: Settings → VisionScaper, section "Selling extra AI credits" (read from the plugin code).

Get your Stripe webhook signing secret

Add VisionScaper's address in Stripe, pick the events it needs, and copy the whsec_ signing secret.

A webhook is how Stripe tells your website that something happened, such as a finished payment. The signing secret lets VisionScaper check that the message really came from Stripe. This article shows how to create the webhook and copy the secret.

Before you start

- Your Stripe secret key is saved (see "Get your Stripe secret key").
- Your site uses HTTPS. Stripe accepts only public HTTPS addresses for live mode.

Steps

1. In WordPress, go to **Settings → VisionScaper** and find **Selling extra AI credits**. The page prints the webhook address in step 3 of its instructions. It ends in `/wp-json/dreamscaper/v1/stripe`. Copy the full address from that page. (The word in the path is only a technical address, not a product name.)
2. In the Stripe Dashboard, open the **Webhooks** tab in Workbench (`dashboard.stripe.com/webhooks`).
3. Click **Create an event destination**.
4. Select **Your account** so Stripe sends events from your own account.
5. Choose the payload format. VisionScaper reads the normal event object (`type`, `data.object`), so pick **Snapshot** and choose an API version if Stripe asks. Stripe's page says thin events need a different kind of endpoint. (That Snapshot is the right choice is based on how the plugin reads events; it is not tested.)
6. Select the event types in the table below.
7. Click **Continue**, choose **Webhook endpoint** as the destination type, and click **Continue** again.
8. Paste the address from step 1 into **Endpoint URL**. Add a description if you like.
9. On the webhook settings page, find the signing secret that starts with `whsec_`. Click **Reveal secret** and copy it.
10. Back in **Settings → VisionScaper**, paste it into **Stripe webhook signing secret**. Save.

Events VisionScaper reacts to

The on-screen instructions list only `checkout.session.completed`. The code also handles these, so select them if you use the matching feature:

Event	Used for
`checkout.session.completed`	Credit purchases, plan sign-ups, paid invoices
`checkout.session.async_payment_succeeded`	Bank payments that clear later
`checkout.session.async_payment_failed`	Reopens an invoice when a bank payment fails
`customer.subscription.created`, `.updated`, `.deleted`, `.paused`, `.resumed`	Keeps contractor plans in step with Stripe
`invoice.paid`, `invoice.payment_failed`	Records subscription payments
`account.updated`	Marks a contractor's Stripe account as ready

`account.updated` comes from connected accounts, which Stripe delivers to a separate destination scoped to **Connected accounts**. That second destination has its own signing secret, and VisionScaper has only one secret field. The code also checks account status when a contractor taps **Check status**, so this event is a convenience. How to use two secrets is not verified in code.

Tips

- VisionScaper rejects a message if its time stamp is more than 10 minutes old, so keep your server clock correct.
- If Stripe shows deliveries as `Failed`, open the destination's **Event deliveries** tab and read the status code.
- Test mode and live mode have different secrets. Update the field when you switch.

If something goes wrong

- **Stripe shows 400.** The secret in VisionScaper does not match the destination, or it is blank.
- **Stripe shows a redirect (3xx).** Use the exact final address, including `https://` and no extra redirect from your host.
- **Credit purchases still work without a webhook.** The plugin also confirms credits when the customer returns to the site, so a missed webhook does not lose a purchase.

Sources

- Stripe, webhooks: https://docs.stripe.com/webhooks (read 2026-10-15)
- Stripe, API keys (webhook secrets are separate from keys): https://docs.stripe.com/keys

- Plugin code: billing.php, crm-pay.php, subs.php (events handled).

Set up Stripe Connect for contractor payments

Turn on Connect in your Stripe account so each contractor can be onboarded and paid out through VisionScaper.

Stripe Connect lets your site take a customer's payment and send the money to the contractor's own Stripe account. VisionScaper creates one Express account for each contractor and then sends them to Stripe to finish their details.

> Note: Stripe says Express accounts are an older account type. Its page tells new platforms to look at the newer Accounts v2 setup. VisionScaper's code creates Express accounts, so this article follows that. If Stripe stops allowing this for your account, ask your developer. (Not verified beyond Stripe's docs.)

Before you start

- Your Stripe secret key is saved in **Settings → VisionScaper → Stripe secret key**.
- Your Stripe business account is in the United States. The code creates accounts with country US.

Part 1: what you do in Stripe (site owner, once)

1. Sign in to the Stripe Dashboard.
2. Complete your platform profile. Stripe links to it as `dashboard.stripe.com/connect/registration`.
3. Open the Connect settings page (`dashboard.stripe.com/account/applications/settings`). Add your brand name, color and icon. Stripe says Connect Onboarding requires them.
4. Because you are responsible for losses on Express accounts, read Stripe's risk and fraud guidance before you approve contractors.
5. Make sure the Stripe webhook is set up (see "Get your Stripe webhook signing secret").

Part 2: what each contractor does

1. Open the Contractor Hub, then **Settings → Get paid online**. The card is called "Get paid online (Stripe)".
2. Press **Connect with Stripe**. The button changes to **Finish Stripe setup** if they stopped partway, or **Update my Stripe details** once they are ready.
3. Stripe's own form opens. The contractor enters business and bank details there.
4. When they return, press **Check status**. A green message says "Ready to take payments." Stripe may still need details if it says so.

What VisionScaper asks Stripe for

The code requests card payments, US bank (ACH) payments, and transfers. It sets the business category code to 0780 (landscaping and horticultural services). A contractor counts as ready when Stripe reports charges enabled and details submitted.

Tips

- Account links work once and expire. If a contractor sees an expired page, press the button again to get a new one.
- Payments, fees and rates shown on the contractor's card are placeholders, not approved. Set your own before launch.
- Never email a Stripe onboarding link. Stripe says to give it only to the signed-in account holder inside the app.

If something goes wrong

- **"Online payments aren't set up on this website yet."** The Stripe secret key is blank. Fix that first.
- **"Connect Stripe first" when sending an invoice.** The contractor has not finished onboarding.
- **Stripe refuses to create the account.** Your platform profile may be incomplete. Check Stripe's message in the Dashboard.

Sources

- Stripe, Express connected accounts: https://docs.stripe.com/connect/express-accounts (read 2026-10-15)
- Stripe, Connect overview: https://docs.stripe.com/connect
- Plugin code: crm-pay.php; assets/js/crm.js ("Get paid online (Stripe)").

Stripe test mode and live mode

Try payments safely with test keys, then switch VisionScaper to live keys and a matching webhook secret.

Stripe keeps test money and real money apart. Each side has its own keys and its own webhook secret. Switching means changing both fields in VisionScaper.

Before you start

You need a Stripe account and admin access to WordPress.

Steps: test first

1. In the Stripe Dashboard open the **API keys** page. Stripe calls the test area a sandbox. Its keys start with `sk_test_`.
2. Create a secret key there and paste it into **Settings → VisionScaper → Stripe secret key**.
3. Create a webhook destination in the same sandbox and paste its `whsec_` secret into **Stripe webhook signing secret**.
4. Buy a test credit pack on your site using one of Stripe's test cards (see Stripe's testing page).
5. Check that credits appear and that the Stripe webhook shows `Delivered`.

Steps: go live

1. On the Stripe **API keys** page toggle from sandbox to live mode. The page then shows live keys that start with `sk_live_`.
2. Create or reveal the live secret key and replace the value in **Stripe secret key**.
3. Open **Webhooks** in live mode. Create a destination for the same address. Copy its new `whsec_` secret into **Stripe webhook signing secret**.
4. Save.
5. Run one small real purchase to confirm.
6. Review Stripe's go-live checklist.

What does not carry over

- Test customers, products and payments do not exist in live mode.
- Contractors who connected a test Express account must connect again in live mode. Stripe notes that Connect account objects in a sandbox do not return sensitive fields. Whether VisionScaper clears old test account IDs is not verified in code, so test with a throwaway contractor.

Tips

- Keep a note of which mode the site is in.
- If you see a mix of test and live payments in the admin, one of the two fields is still on the old mode.

If something goes wrong

- **"Bad signature" in Stripe's delivery log.** The webhook secret belongs to the other mode. Copy the right one.
- **Card declined with a test card.** You are using a live key. Switch back to test.
- **Live key hidden.** Stripe lets you reveal live keys only when Stripe created them. If you made it yourself and did not save it, create a new key.

Sources

- Stripe, API keys (sandbox vs live): https://docs.stripe.com/keys (read 2026-10-15)
- Stripe, webhooks: https://docs.stripe.com/webhooks

Replace or rotate a Stripe key

Safely swap the Stripe secret key or webhook secret in VisionScaper without dropping payments.

Replace a Stripe key if it leaked, if someone who knew it left, or if you lost it. This article gives the order that keeps payments working.

Before you start

You need access to the Stripe Dashboard and to **Settings → VisionScaper** in WordPress.

Steps: rotate the secret key

1. In Stripe, open the **API keys** page.
2. Click the overflow menu (three dots) next to the key and choose **Rotate key**.
3. Pick an expiry in the **Expiration** list. Stripe's page says both old and new keys work for up to 7 days when you use its grace period. Choosing **Now** deletes the old key at once.
4. Click **Rotate API key**.
5. Click the new key value to copy it, then save it. Stripe will not show it again.
6. In WordPress, paste it into **Stripe secret key** and save.
7. Wait until the old key shows no requests, then expire it.

Steps: roll the webhook secret

1. In the **Webhooks** tab, click the destination.
2. Open its overflow menu and choose **Roll secret**.
3. You can expire the current secret now or delay up to 24 hours. Delay it while you update VisionScaper.
4. Copy the new `whsec_` value into **Stripe webhook signing secret** and save.

Steps: if a key leaked

1. Rotate it with **Now** as the expiry.
2. Check the key's request log (overflow menu, **View request logs**).
3. Contact Stripe support if you see requests you do not recognize.

Tips

- Add a note to each key that says where it lives.
- Stripe offers access policies that limit a key to certain IP addresses. Whether your host has a fixed IP is up to your host.

If something goes wrong

- **Payments stop right after rotating.** You chose **Now** and VisionScaper still has the old key. Paste the new one.
- **Stripe says the key has limited access.** Stripe can limit a key not used for payouts or transfers in 180 days. Use **Restore access** in the overflow menu.

Sources

- Stripe, API keys (rotate, expire, restore): https://docs.stripe.com/keys (read 2026-10-15)
- Stripe, webhooks (roll secret): https://docs.stripe.com/webhooks

Get your Twilio Account SID and Auth Token

Find the Twilio Account SID and Auth Token and paste them into VisionScaper's text-message settings.

VisionScaper sends and receives texts through Twilio by default. It needs your Twilio **Account SID** and **Auth Token**, plus a number or a Messaging Service. This article covers the first two.

Before you start

- A Twilio account (twilio.com/try-twilio).
- Admin access to WordPress.

Steps

1. Sign in to the Twilio Console (`twilio.com/console`). Twilio's own code comments say your Account SID can be found there.
2. Find the **Account SID**. It starts with `AC`. (Twilio's documentation pages I read do not say which box on the Console home page shows it, so look for the label "Account SID". Not verified.)
3. Find the **Auth Token** next to it. It is hidden until you reveal it. (Exact button wording not verified. Twilio's docs also point to Settings → Account settings → **API keys & auth tokens**, which is the page they use for API keys.)
4. In WordPress, go to **Settings → VisionScaper**. Scroll to **Text messages (Twilio)**.
5. Paste the SID into **Twilio Account SID**. VisionScaper removes any character that is not a letter or number.
6. Paste the token into **Twilio Auth Token**. It is a hidden field; VisionScaper keeps what you saved if you leave it blank next time.
7. Fill **Twilio phone number** or **Messaging Service SID (optional)** (see the next two articles).
8. Save.

What the fields do

Field	What it does
Twilio Account SID	Says which Twilio account to use. Starts with `AC`.
Twilio Auth Token	Lets VisionScaper send texts and check that incoming webhooks are really from Twilio.
Twilio phone number	The number texts come from, like `+18605550100`. Not needed with a Messaging Service.
Messaging Service SID (optional)	Starts with `MG`. Uses a Messaging Service as the sender.

Tips

- Twilio says API keys are the preferred way to sign in for new software, and an auth token is only for places that ask for it. VisionScaper's field is named "Auth Token", so use the token. Whether it accepts an API key is not verified in code.
- Treat the token like a password. Anyone with it can send texts at your cost.
- If you change the Auth Token in Twilio, update VisionScaper the same day.

If something goes wrong

- **Texts fail with an authentication error.** The SID or token was copied wrong, or the token was changed in Twilio.
- **A new text says it was blocked.** US carriers block texts until A2P 10DLC registration is approved (see "Register for A2P 10DLC on Twilio").
- **Incoming webhook rejected.** VisionScaper checks Twilio's signature with the same token. A wrong token breaks incoming texts.

Sources

- Twilio, API keys: https://www.twilio.com/docs/iam/api-keys (read 2026-10-15)
- Twilio, create API keys in the Console: https://www.twilio.com/docs/iam/api-keys/keys-in-console
- Twilio, requests to Twilio: https://www.twilio.com/docs/usage/requests-to-twilio
- The Twilio Help Center page for auth tokens could not be read (it needs JavaScript), so the location of the SID and token on the Console home page is unverified.

Buy a Twilio phone number for texting

Get a text-capable Twilio number and enter it in VisionScaper as the number texts come from.

Texts need a sending number. VisionScaper can use a single Twilio number, or a Messaging Service that holds one or more numbers.

Before you start

- A Twilio account with the Account SID and Auth Token saved (see "Get your Twilio Account SID and Auth Token").
- Twilio asks you to register your business before US carriers deliver texts. Plan for that wait.

Steps

1. In the Twilio Console, open the phone number area and search for a number with **SMS** ability. Twilio's phone-number page says you can search for and buy numbers and manage them; it does not spell out the menu labels, so follow what the Console shows. (Menu labels not verified.)
2. Pick a local number in or near your area, such as a 860 number for Connecticut, if you want customers to recognize it.
3. Buy it.
4. Write the number in international format, for example `+18605550100`. Start with a plus sign and the country code. Use no spaces or dashes.
5. In WordPress, go to **Settings → VisionScaper**. In **Text messages (Twilio)**, paste it into **Twilio phone number**.
6. Save.

When to leave the number blank

The help text under the field says the number is not needed if you use a Messaging Service. In that case the sender comes from the Messaging Service's sender pool. See "Create a Twilio Messaging Service".

One number per contractor (optional)

On **Settings → VisionScaper Marketing**, the section **Texts & missed calls (Twilio)** lets you assign a Twilio number to each approved contractor. Each contractor number must also be added to your Messaging Service. The page also tells you which webhook addresses to set on that number (see "Point Twilio at VisionScaper"). Any per-number cost shown on that page is Twilio's and may change. Check Twilio's current pricing.

Tips

- Keep a list of which number belongs to which business.
- A US number used for business texts must be attached to an approved campaign (see the registration article).

If something goes wrong

- **Test text never arrives.** The number may not be registered yet, or the customer's carrier filtered it.
- **"Invalid From number."** The number is not in international format, or does not belong to this Twilio account.
- **Replies do not show in VisionScaper.** The number's incoming-message webhook is not set.

Sources

- Twilio, phone numbers: https://www.twilio.com/docs/phone-numbers (read 2026-10-15; limited detail)
- Direct Sole Proprietor onboarding (sender numbers and Messaging Services): https://www.twilio.com/docs/messaging/compliance/a2p-10dlc/direct-sole-proprietor-registration-overview
- Plugin: dreamscaper.php (Text messages (Twilio)); includes/marketing-admin.php.

Create a Twilio Messaging Service

Make a Messaging Service, add your number, and paste its MG SID into VisionScaper.

A Messaging Service is a container for your sending numbers. Twilio ties your A2P 10DLC campaign to a Messaging Service, so most businesses should use one.

Before you start

- A Twilio account and at least one text-capable number.

Steps

1. In the Twilio Console go to **Messaging > Services**.
2. Click **Create Messaging Service**.
3. Give it a name and choose a use case.
4. Add senders to the sender pool. To add a number later, open the service and use **Add Senders** in the **Sender Pool** section.
5. In the **Integration** section, check how incoming messages are handled. Twilio's default is "Defer to sender's webhook", which means each number's own webhook is used. VisionScaper's help text says you can set the incoming webhook on the number or on the Messaging Service (see "Point Twilio at VisionScaper").
6. Add the compliance information Twilio asks for.
7. Find the **Messaging Service SID**. It starts with `MG`. Twilio's page does not say where the Console shows it. Open the service details and look for "SID". Not verified.
8. In WordPress go to **Settings → VisionScaper → Text messages (Twilio)**.
9. Paste the SID into **Messaging Service SID (optional)**.
10. Save.

What VisionScaper does with it

With a Messaging Service set, outgoing texts can use its sender pool instead of the single **Twilio phone number**. The exact sending logic is not verified here beyond the field's help text.

Tips

- Twilio says a Messaging Service can be linked to only one campaign at a time. Add every number you will text from before you submit the campaign.
- Delivery status callbacks are set in the same **Integration** section under **Delivery Status Callback**. VisionScaper does not ask for one in its Twilio settings (not verified).

If something goes wrong

- **Texts fail after setting the SID.** The service has no sender, or the sender number is not attached to an approved campaign.
- **The SID does not start with `MG`.** You copied another kind of SID.
- **A registered contractor number is missing.** Add it to the Sender Pool.

Sources

- Twilio, Messaging Services: https://www.twilio.com/docs/messaging/services (read 2026-10-15)
- Twilio, Direct Standard onboarding: https://www.twilio.com/docs/messaging/compliance/a2p-10dlc/direct-standard-onboarding
- Plugin: dreamscaper.php, field "Messaging Service SID (optional)".

Register for A2P 10DLC on Twilio

The registration US carriers require before business texts are delivered, and what you need to have ready.

In the US, carriers require businesses to register before they send app-to-person texts on a regular phone number. VisionScaper's own setup page says texts are blocked by carriers until this is approved. This article follows Twilio's current guides. Use the live screens in the Twilio Console, because wording changes.

> Warning: Review time is set by carriers and Twilio, not by VisionScaper. Start early. Twilio's guide says campaign review is manual and currently reports 10 to 15 days, and some sources say two to three weeks.

Before you start

- A Twilio account and a text-capable number.
- Your legal business name, tax ID (EIN), address, website, and a contact email that carriers can reach.
- Plain-language answers to: how do customers say yes to texts, and what will a sample text say?
- VisionScaper's own "Get ready to text" form asks for the same items: legal name, EIN in the form `12-3456789`, website starting `https://`, street address, contact email, what you text about, how customers opt in, and a sample text that includes the word STOP.

Choose your path

Path	Who it fits
Standard or Low-Volume Standard brand	Businesses with an EIN. Twilio's guide says choose Low-Volume Standard if you send fewer than 6,000 message segments per day.
Sole Proprietor brand	Businesses in the US or Canada with no tax ID. One campaign, one number.

Steps (Standard path)

1. In the Twilio Console go to the **Onboarding** page under Messaging > Regulatory Compliance.
2. Open the **Create Customer Profile** tab. Fill in your business details. Approval can take 72 hours or more, and you can start the brand while it waits. Skip this if you already have a Primary Customer Profile.
3. Open the **Register Brand** tab. Enter the brand details and a brand contact email (used for two-factor identity checks). Twilio sends it to The Campaign Registry. Statuses are `IN_REVIEW`, `APPROVED`, `FAILED` or `SUSPENDED`. Manual review can take seven business days or more.
4. When the brand is `APPROVED`, press **Continue** to see your messaging limits.
5. Create a Messaging Service and add your numbers (see "Create a Twilio Messaging Service").
6. Open the **Campaign Registration** tab. Choose a use case, pick your Messaging Service, and describe opt-in, opt-out and help handling.
7. Wait for approval. A brand can have up to five campaigns.

Steps (Sole Proprietor path)

Twilio's guide lists these in order: create a Starter Profile, register the brand with a one-time code sent to your mobile phone (answer within 24 hours), register the campaign with the Sole Proprietor use case, then add your single number to the new Messaging Service.

Tips

- Use details that match your tax records. Twilio says this affects your trust score, which sets throughput and daily limits.
- Always include opt-out language ("Reply STOP to opt out") in sample messages.
- VisionScaper honors STOP replies and names the business in marketing texts. That helps with review but does not replace registration.

If something goes wrong

- **Brand `FAILED`.** Open the brand overview in the Console and read the reason. Fix the mismatch and resubmit.
- **Campaign rejected.** Carriers read sample texts. Make them realistic and add opt-out words.
- **Texts blocked after approval.** Make sure the number is in the Messaging Service attached to the campaign.

Sources

- Twilio, A2P 10DLC overview: https://www.twilio.com/docs/messaging/compliance/a2p-10dlc (read 2026-10-15)
- Twilio, Direct Standard onboarding: https://www.twilio.com/docs/messaging/compliance/a2p-10dlc/direct-standard-onboarding

- Twilio, Direct Sole Proprietor: https://www.twilio.com/docs/messaging/compliance/a2p-10dlc/direct-sole-proprietor-registration-overview
- Plugin: includes/messaging-providers.php ("Get ready to text" checks).

Twilio campaign type for marketing texts

Why marketing texts need their own A2P campaign, and what VisionScaper does to stay within the rules.

VisionScaper can text promotions, but only if the Twilio campaign allows them. A campaign that says "customer care" alone cannot carry promotions. This article explains how to choose the right use case.

Before you start

- Read "Register for A2P 10DLC on Twilio".
- Know whether you send only job updates, only offers, or both.

What VisionScaper says on its Marketing page

On **Settings → VisionScaper Marketing**, under **Texts & missed calls (Twilio)**, the text under **Marketing texts** says:

- Marketing texts need their own A2P 10DLC campaign in Twilio, with use case "Marketing" or "Mixed".
- It sends marketing texts only to customers who gave written consent: a sign-up page, a signed form, or replying YES.
- It names the business in every text and honors STOP.

VisionScaper's "Get ready to text" form offers three choices: Customer care (appointment and job updates), Marketing and offers, and Both updates and offers.

Steps

1. Decide the use case. - Job and appointment updates only: Customer care. - Offers and promotions: Marketing, or a mixed use case that covers both.
2. In Twilio's Campaign Registration, pick the matching use case. Twilio's guide says some use cases need extra carrier review.
3. Write sample texts that match. A promo sample should name your business and include "Reply STOP to opt out."
4. Describe how people agree to get texts. Match what VisionScaper really does: written consent from a sign-up page, a signed form, or a YES reply.
5. Attach the Messaging Service that holds your sending numbers.
6. If you already have a Customer care campaign, you need a second campaign for marketing. Twilio's guide says a brand can have up to five campaigns, and one Messaging Service links to one campaign at a time.

Tips

- Do not mix promotions into a Customer-care-only campaign. Carriers may filter or block the number.
- Keep proof of consent. VisionScaper records opt-outs; keep your own proof of opt-in.
- Cost fields shown on the Marketing page (for example, cost per text segment) are your own estimates and are used for return-on-investment numbers only. The values shown by default are placeholders, not approved.

If something goes wrong

- **Promo texts do not arrive but updates do.** The number is attached to a campaign that does not cover marketing.
- **Customers complain about texts they did not request.** Check how they were added. Marketing texts should go only to consented contacts.

Sources

- Twilio, A2P 10DLC overview and onboarding guides: https://www.twilio.com/docs/messaging/compliance/a2p-10dlc (read 2026-10-15)
- Plugin: includes/marketing-admin.php; includes/messaging-providers.php (use case labels).

Point Twilio at VisionScaper

Set the incoming-message and incoming-call webhook addresses on your Twilio number so replies reach VisionScaper.

When a customer replies, Twilio must tell your website. You do that by putting two addresses into Twilio. VisionScaper then logs the reply, emails the contractor, turns unknown texters into leads, and honors STOP.

Before you start

- A Twilio number or Messaging Service.
- Your Twilio Auth Token saved in VisionScaper. The plugin uses it to check that each webhook is from Twilio.

The two addresses

Both addresses are printed in WordPress. Copy them from there, because the start depends on your site.

Twilio setting	Address ends in	Printed at
A message comes in	`/wp-json/dreamscaper/v1/crm/twilio`	Settings → VisionScaper, **Text messages (Twilio)**, step 4
A call comes in	`/wp-json/dreamscaper/v1/crm/voice`	Settings → VisionScaper Marketing, **Texts & missed calls (Twilio)**

(The word in the path is only a technical address, not a product name.)

Steps

1. In the Twilio Console open the number (or the Messaging Service).
2. Find the setting named **A message comes in**. VisionScaper's own instructions use that name. Twilio's help pages I read did not give the Console wording, so use what you see. Not verified.
3. Choose **Webhook**, method **HTTP POST**, and paste the text address.
4. If you use missed-call texting on a contractor number, set **A call comes in** to the voice address (webhook, HTTP POST).
5. Save in Twilio.
6. Send a test text to your number from your own phone. Reply "STOP" and "START" to see the opt-out work.

What VisionScaper does with each reply

- Logs it in the contractor's customer record.
- Emails the contractor.
- Treats a text from an unknown number as a new lead.
- Honors STOP.
- For calls: rings the contractor's phone, offers voicemail if no one answers, and texts the caller right away. The contractor picks which phone it rings in the Marketing controls.

Tips

- Twilio's Messaging Service defaults to "Defer to sender's webhook", so set the webhook on each number unless you changed that.
- The address must be public HTTPS. A site behind a password page will not work.

If something goes wrong

- **Twilio shows a 403 or an error status.** The Auth Token in VisionScaper does not match the Twilio account.
- **Twilio shows 404.** The site's permalinks may be off. Open the address in a browser. If it fails, check with your host.
- **Replies never arrive.** The webhook was set on a different number or service than the one you text.

Sources

- Twilio, Messaging Services (webhook behavior): https://www.twilio.com/docs/messaging/services (read 2026-10-15)
- Twilio, receive and reply tutorial (did not show Console labels): https://www.twilio.com/docs/messaging/tutorials/how-to-receive-and-reply
- Plugin: dreamscaper.php; includes/crm-public.php (signature check); includes/marketing-admin.php.

Get your Telnyx API key

Create a Telnyx API key and enter it with your sending number and messaging profile in VisionScaper.

Telnyx is the second text service VisionScaper supports. You can use it instead of Twilio, or keep Twilio as the main service and let Telnyx act as a backup.

Before you start

- A Telnyx account.
- Admin access to WordPress.

Steps

1. Sign in to the Telnyx Mission Control Portal.
2. Open **API Keys**.
3. Select **Create API Key**.
4. Enter a label that says where it is used, for example "VisionScaper website".
5. Under **Expiration**, choose **No Expiration** or **Set Expiration Date**. If you set a date, put a reminder in your calendar.
6. Create the key and copy it right away. Telnyx says the key value is shown once.
7. In WordPress go to **Settings → VisionScaper Messaging**.
8. In the **Texts** section, paste it into **Telnyx key**.
9. Fill the other Telnyx fields (see the next article): **Telnyx sending number** and **Telnyx messaging profile**. Also see "Telnyx webhook address and secret" for **Telnyx webhook secret**.
10. In **Text service**, choose **Telnyx** if you want it to be the main service.
11. Tick **If it fails, try the other one** if you want automatic backup to Twilio.
12. Click **Save**. The page prints "Saved."

How the fields behave

Field	What it does
Telnyx key	The Bearer token VisionScaper sends to `api.telnyx.com/v2/messages`. A hidden field: leave it blank to keep the saved one.
Telnyx sending number	The number texts come from. A normal text box.
Telnyx messaging profile	Optional. Sent along with each text if filled.

Telnyx also appears as **Telnyx key** on **Settings → VisionScaper AI Receptionist** for phone numbers there. That field is separate. What it is used for there is not verified in this article.

Tips

- VisionScaper adds "Reply STOP to opt out." to a text that does not already contain the word STOP.
- It will not text a number that replied STOP, or sample customers.
- Telnyx's quick start says sending to numbers outside Telnyx usually needs sender registration (10DLC or toll-free verification) or you may see error 40301.

If something goes wrong

- **"Text not sent" with error 40300.** The sending number has no messaging profile.
- **Error 40301.** The number is not registered for your use. See "Register for 10DLC on Telnyx."
- **Nothing sends and the setting says the provider is not ready.** Both the key and the sending number must be filled for Telnyx to count as ready.

Sources

- Telnyx, create API keys: https://developers.telnyx.com/docs/development/api-fundamentals/create-api-keys (read 2026-10-15)
- Telnyx, send a message: https://developers.telnyx.com/docs/messaging/messages/send-message
- Plugin: includes/messaging-providers.php (Settings → VisionScaper Messaging).

Telnyx number and messaging profile

Buy a text-capable Telnyx number, create a messaging profile, and attach one to the other.

Telnyx will not send a text from a number that has no messaging profile. This article sets up the number and the profile, and shows which VisionScaper fields they go in.

Before you start

- A Telnyx account and an API key saved in VisionScaper ("Get your Telnyx API key").

Steps

1. In the Mission Control Portal go to **Numbers > Search & Buy**.
2. Tick **SMS** under features and buy a number.
3. Go to **Messaging** and click **Add new profile**. Name it and click **Save**.
4. Go to **My Numbers**. For your number, open the **Messaging Profile** dropdown, choose your profile, and save.
5. Note the number in international format, like `+18605550100`.
6. Open the profile's details and find its ID. Telnyx's quick-start page does not say where the ID is shown, so look for an "ID" next to the profile name. (Not verified.)
7. In WordPress open **Settings → VisionScaper Messaging**, section **Texts**.
8. Enter the number in **Telnyx sending number**.
9. Enter the ID in **Telnyx messaging profile**. Saved values for these two boxes show in the box after you save; the key and secret boxes do not.
10. Click **Save**.

Add the webhook address to the profile

Telnyx looks for a webhook address in two places: on each message, then on the messaging profile. VisionScaper adds its address to a message only when it asks for a status callback. Setting the address on the profile too is safer. See "Telnyx webhook address and secret".

Tips

- The sending number must belong to your Telnyx account and be in E.164 format.
- Keep one profile per brand if you have many businesses.
- The field is optional in VisionScaper, but Telnyx requires the number to have a profile, so fill it.

If something goes wrong

- **Error 40300 when sending.** The number has no messaging profile.
- **Error 40301.** Registration is missing. See the Telnyx 10DLC article.
- **Wrong profile ID.** Telnyx rejects the message. Copy it again.

Sources

- Telnyx, send a message: https://developers.telnyx.com/docs/messaging/messages/send-message (read 2026-10-15)
- Telnyx, inbound webhooks: https://developers.telnyx.com/docs/messaging/messages/receiving-webhooks
- Plugin: includes/messaging-providers.php.

Register for 10DLC on Telnyx

The four Telnyx steps - brand, vetting, campaign, number assignment - needed before business texts are delivered.

US carriers require business texts on local numbers to be registered. Telnyx handles this with a brand and a campaign. VisionScaper does not do the registration for you. It only sends once the carrier accepts the number.

Before you start

- A Telnyx number already attached to a messaging profile.
- Your legal business name, tax ID (EIN), address, and vertical.
- Realistic sample texts that include opt-out words.
- VisionScaper's "Get ready to text" answers (see the Twilio registration article) are a good checklist.

Steps

1. **Create a brand.** Enter your legal name, EIN, address and vertical. Telnyx's page says this step is instant.
2. **Vet the brand.** A third party gives a trust score from 0 to 100. That score sets your throughput limits. Telnyx's page calls vetting critical and says it takes 1 to 7 business days.
3. **Create a campaign** for each use case. Creating it is instant, but carriers must approve it. They read your sample messages.
4. **Assign phone numbers** to the campaign. The numbers must already have a messaging profile.

You can do all four in the Mission Control Portal: the Brands page, then the Campaigns page, then the **Assign Numbers** panel on your campaign. Telnyx also offers API calls for each step.

Which use case?

Pick what matches what VisionScaper sends: job updates (customer care) or promotions (marketing). A campaign made for updates only is not meant for promotions. See "Twilio campaign type for marketing texts" for the same rule explained.

Tips

- Telnyx's docs do not list fees on this page. Check Telnyx's current pricing yourself.
- Use details that match your tax records.
- Write down the brand ID and campaign ID.

If something goes wrong

- **Error 40301 when sending.** The number is not assigned to an approved campaign.
- **Brand vetting score is low.** Throughput is limited. Ask Telnyx how to improve it.
- **Campaign rejected.** Rewrite the sample texts to be clearer and include "Reply STOP".

Sources

- Telnyx, 10DLC quickstart: https://developers.telnyx.com/docs/messaging/10dlc/quickstart (read 2026-10-15)
- Telnyx, send a message: https://developers.telnyx.com/docs/messaging/messages/send-message

Telnyx webhook address and secret

Where to put VisionScaper's Telnyx address, and an important note about how VisionScaper checks the secret.

Telnyx tells your site about delivery and replies through a webhook. VisionScaper shows the address to use. It also has a **Telnyx webhook secret** field.

> Warning: Read the "Known gap" section before you rely on this. From reading the plugin code, the secret check may not match how Telnyx signs its messages.

Before you start

- The Telnyx key, sending number and messaging profile are saved (see the two earlier Telnyx articles).

Steps

1. In WordPress open **Settings → VisionScaper Messaging**, section **Texts**.
2. Find the read-only box **Webhook address**. It ends in `/wp-json/dreamscaper/v1/msg/webhook/telnyx`. Copy it.
3. In the Mission Control Portal open your messaging profile and paste the address in the profile's webhook URL field. Telnyx says the profile is where the URL is set; the exact field label is not verified.
4. Choose or create a secret string. Enter the same value in **Telnyx webhook secret** and save.
5. Send a test text and reply to it. Check that the reply appears.

What VisionScaper does with Telnyx events

Telnyx event	Result
`message.received`	Treated as an incoming text.
`message.finalized` or `message.sent` with status delivered	Marks the message delivered.
Status `delivery_failed`, `sending_failed` or `delivery_unconfirmed`	Marks it failed.

Each event is handled only once, even if Telnyx sends it again.

Known gap: how the secret is checked

- VisionScaper reads a header named `X-Telnyx-Signature`. It expects the lowercase hexadecimal HMAC-SHA256 of the raw body, using your **Telnyx webhook secret**. Without a matching header the answer is "Bad signature" (403).
- Telnyx's documentation says its webhooks carry `telnyx-signature-ed25519` and `telnyx-timestamp` headers, signed with an Ed25519 key. Its public key is under Keys & Credentials in the portal.
- These two schemes are different. Whether Telnyx can be made to send the header VisionScaper expects is not verified. If Telnyx's own webhooks are rejected, delivery status and incoming replies on Telnyx will not reach VisionScaper. Sending still works.
- Ask the VisionScaper team to confirm before you rely on Telnyx for replies and STOP handling.

Tips

- Telnyx wants a `2xx` answer within 2 seconds. It retries up to 3 times.
- Use Twilio for incoming replies until the gap is resolved.

If something goes wrong

- **403 "Bad signature" in Telnyx's logs.** See the known gap above.
- **Nothing arrives.** No webhook address on the profile.

Sources

- Telnyx, inbound message webhooks: https://developers.telnyx.com/docs/messaging/messages/receiving-webhooks (read 2026-10-15)
- Plugin code: includes/messaging-providers.php (dreamscaper_msg_verify, dreamscaper_rest_msg_webhook).
- Telnyx's separate "messaging webhooks" page could not be fetched.

Get your Postmark Server API token

Find the Postmark Server API token, set up a Broadcast stream and a verified sender, and fill VisionScaper's Marketing page.

Postmark is the email service VisionScaper recommends for marketing email. Its Broadcast stream keeps marketing apart from receipts and password mail, and it reports bounces and spam complaints.

Before you start

- A Postmark account. Postmark's message-streams page says new customers start a free trial and must request approval before sending broadcast email.
- A domain or email address you can prove you own, and access to its DNS settings.

Steps

1. Sign in to Postmark and open your **Server** (create one if needed).
2. Open the server's **API Tokens** tab. Copy the **Server API token**. Postmark says the Server token is for server-level requests and is sent in the `X-Postmark-Server-Token` header. Do not use the Account token.
3. Create a **Broadcast** message stream. Postmark classifies streams as transactional (`outbound`) or broadcast (`broadcast`), and a server can have up to 10. For the creation steps, follow Postmark's own guide "how to create and send through message streams" (the page could not be opened here, so the button names are not verified).
4. In the stream's settings, choose to manage unsubscribes yourself. VisionScaper adds its own unsubscribe link and a one-click unsubscribe header.
5. Verify a sender. Postmark needs a confirmed Sender Signature or a verified domain for the address you send from, or the API returns an error. For a domain, add the DKIM and Return-Path DNS records Postmark shows. Also publish a DMARC record. VisionScaper's help text says Gmail and Yahoo require it for bulk mail.
6. In WordPress go to **Settings → VisionScaper Marketing**.
7. Choose the radio button **Postmark (recommended)**.
8. Paste the token into **Postmark Server API token**. A saved token shows as dots. Tick **clear** to remove it.
9. Enter the stream name in **Broadcast stream ID**. The usual value is `broadcast`.
10. Enter **Send from address**, an address on the verified domain, for example `hello@mail.yoursite.com`.
11. Set **Sender name**. `{company_name}` becomes each contractor's business name, for example "{company_name} via VisionScaper".
12. Click **Save & send me a test email**. The page says "Saved — test email sent to" your address when it works, or shows the failure reason.

How the choice affects sending

If **Postmark** is selected but the token or a valid send-from address is missing, VisionScaper falls back to the site's own mail. The status line at the top of the page shows "Email: Postmark" or "Email: Website mail" so you can check.

Tips

- Use a sending subdomain (like `mail.`) so your main domain stays safe.
- The default radio button, **This website's own mail**, is fine for tests and small lists. It has no bounce handling.
- Postmark's test token `POSTMARK_API_TEST` sends test requests that are not delivered. Do not use it for real mail.
- Postmark pricing and trial terms are not repeated here. Check Postmark's site.

If something goes wrong

- **Test email fails with a sender error.** The send-from address is not a confirmed signature or verified domain.
- **HTTP 401.** The wrong token type was pasted.
- **Mail lands in spam.** DKIM, Return-Path or DMARC is missing.

Sources

- Postmark, API overview (tokens): https://postmarkapp.com/developer/api/overview (read 2026-10-15)
- Postmark, message streams: https://postmarkapp.com/message-streams
- Postmark, send email with API (sender signature, test token): https://postmarkapp.com/developer/user-guide/send-email-with-api
- Postmark's sender-signature and stream-management pages could not be fetched; DNS and button names are unverified.
- Plugin: includes/marketing-admin.php (Settings → VisionScaper Marketing).

Postmark webhook for bounces and complaints

Add the Postmark webhook address from VisionScaper's Marketing page and pick the four events.

When someone bounces, marks an email as spam, or unsubscribes, Postmark can tell your website. VisionScaper then stops mailing that person.

Before you start

- Postmark is set up (see "Get your Postmark Server API token").
- A Broadcast stream exists.

Steps

1. In WordPress open **Settings → VisionScaper Marketing**.
2. Find the row **Postmark webhook**. It shows an address that ends with `/wp-json/dreamscaper/v1/mkt/postmark?k=` and a long random key. Click the box and copy all of it, including the key after `k=`. The key is VisionScaper's own secret and is created automatically.
3. In Postmark open your server, then your Broadcast stream, then **Webhooks**, and add a webhook. That is the path VisionScaper's page gives. The button text is not verified.
4. Paste the address.
5. Tick **Delivery**, **Bounce**, **Spam Complaint** and **Subscription Change**.
6. Use Postmark's verify option. Postmark says it tests the address for each enabled event and expects a 200 reply.
7. Save.

What each event does

Event	VisionScaper action
Delivery	Marks the send delivered
Bounce	Marks the contact's email as bounced
Spam Complaint	Stops email to that contact
Subscription Change	Records an unsubscribe

(Per the plugin's description of the webhook handler. Exact status wording not verified.)

Tips

- Postmark does not sign webhooks. Its page suggests using a password in the URL, limiting by IP, and checking payloads. VisionScaper uses its secret key in the address, so keep the address private.
- Do not paste the address in public places. Anyone who has it can send fake events.
- Postmark also offers Open, Click, Inbound and other events. VisionScaper's page asks only for the four above.

If something goes wrong

- **Postmark says the webhook failed verification.** The site is not public, or the address was cut off before the key.
- **Unsubscribes do not register.** The webhook was added to the wrong stream.

Sources

- Postmark, webhooks overview: https://postmarkapp.com/developer/webhooks/webhooks-overview (read 2026-10-15)
- Plugin: includes/marketing-admin.php; includes/marketing-public.php.

Get your Resend API key

Create a Resend API key, verify a sending domain, and select Resend as the email service in VisionScaper.

Resend is one of three alternative email services in **Settings → VisionScaper Messaging**. Use it if you prefer it to Postmark.

Before you start

- A Resend account.
- A domain you own. Resend says you must add and verify at least one domain before you can send, and it cannot be a public or shared domain.

Steps

1. Sign in to the Resend Dashboard.
2. Open the **Domains** page (`resend.com/domains`). Add your domain, or a sub-domain like `updates.yoursite.com`. You can choose a region. Follow Resend's add-a-domain guide for the DNS records. (The record list is not in the pages I read, so it is unverified.)
3. Open the **API keys** page (`resend.com/api-keys`).
4. Create a key. You give it a name, a permission, and an optional domain restriction. The permission choices were not confirmed in the docs I read. Choose the narrowest one that allows sending.
5. Copy the key. Resend says you cannot view or edit the value after it is created.
6. In WordPress go to **Settings → VisionScaper Messaging** and the **Email** section.
7. In **Email service**, choose **Resend**.
8. Paste the key into **Resend key**.
9. Fill **Resend webhook secret** if you set up the webhook (see the next article).
10. Click **Save**.
11. Go to **Settings → VisionScaper Marketing** and set **Send from address** to an address on the verified domain.

Tips

- If **Email service** says "Use the one in Marketing settings", VisionScaper uses the choice made on the Marketing page (Postmark or the site's mail).
- The plugin sends the From name, a reply-to, and one-click unsubscribe headers with each message.

If something goes wrong

- **"The email service isn't connected yet."** The key is blank.
- **"Set a sender email address first." Send from address** is empty or invalid.
- **Resend rejects the send.** The domain is not verified or the From address is on another domain.

Sources

- Resend, API keys: https://resend.com/docs/dashboard/api-keys/introduction (read 2026-10-15)
- Resend, domains: https://resend.com/docs/dashboard/domains/introduction
- Plugin: includes/messaging-providers.php.

Resend webhook address and secret

Point Resend at VisionScaper for bounces and complaints, and understand a signature mismatch in the current code.

A webhook lets Resend tell VisionScaper when a message was delivered, bounced, or flagged as spam.

> Warning: Read "Known gap" first. VisionScaper's signature check may not match Resend's.

Before you start

- Resend is set up (see "Get your Resend API key").

Steps

1. In WordPress open **Settings → VisionScaper Messaging**. The page prints a **Webhook address** only in the Texts section for Telnyx. For the other services, the address follows the same pattern: `/wp-json/dreamscaper/v1/msg/webhook/resend` on your site. (The plugin registers that path. The page does not print it for Resend. Not verified on screen.)
2. In the Resend Dashboard, add a webhook. Resend's overview says: create a route that takes POST requests, then define a webhook with its URL and the events. The exact menu path is on Resend's "Create webhook" page, which I did not open.
3. Choose these events: `email.delivered`, `email.bounced`, `email.complained`, `email.failed`. Those are the names the code looks for. Resend's overview did not list names, so confirm them in Resend.
4. Open the webhook's details page. Resend says the signing secret is there.
5. Paste the secret into **Resend webhook secret** and save.

What VisionScaper does

Event	Result
`email.delivered`	Delivered
`email.bounced`	Bounced; contact marked bounced
`email.complained`	Opt-out recorded
`email.failed`	Failed

Known gap: the signature check

- VisionScaper expects a header `X-Resend-Signature` holding the hex HMAC-SHA256 of the raw body using your **Resend webhook secret**.
- Resend's docs say it signs with Svix and sends `svix-id`, `svix-timestamp` and `svix-signature` headers.
- These do not look compatible. Whether a bridge exists is not verified. If so, VisionScaper answers "Bad signature" (403) and ignores the event. Sending is not affected.
- Until the VisionScaper team confirms, do not count on bounce handling from Resend. Use Postmark for marketing email if you need it.

Tips

- Pass the raw body when verifying. Re-formatted JSON breaks any signature check.
- Look at Resend's webhook log for failures.

If something goes wrong

- **403 in Resend's log.** See the known gap.
- **No events at all.** Wrong address or wrong events selected.

Sources

- Resend, webhooks introduction: https://resend.com/docs/dashboard/webhooks/introduction (read 2026-10-15)
- Resend, verify webhook requests: https://resend.com/docs/webhooks/verify-webhooks-requests
- Plugin: includes/messaging-providers.php.

Get your SendGrid API key

Create a SendGrid API key, authenticate your domain, and select SendGrid in VisionScaper Messaging.

SendGrid is another email service you can choose in **Settings → VisionScaper Messaging**.

Before you start

- A SendGrid account.
- Access to your domain's DNS.

Steps

1. In the SendGrid console go to **Settings > API Keys**.
2. Click **Create API Key**.
3. Type a name in **API Key Name**, for example "VisionScaper website".
4. Choose a permission level. SendGrid's page lists **Full Access**, **Custom Access**, **Billing Access** and **Email Address Validation Access**. Pick **Custom Access** and allow only mail sending. The exact "Mail Send" label was not shown on the page I read, so look for it in the list. VisionScaper calls only the mail-send endpoint.
5. Click **Create & View** and copy the key. SendGrid shows it only once.
6. Authenticate your domain. Go to **Settings > Sender Authentication** and click **Get Started** in the Domain Authentication section. Choose **Authenticate Your Domain**, select your DNS host, enter the root domain only, click **Next**, add the DNS records (or use **Connect** if your host supports it), then click **Verify**. SendGrid says DNS changes can take up to 48 hours.
7. In WordPress open **Settings → VisionScaper Messaging**, section **Email**.
8. In **Email service**, choose **SendGrid**.
9. Paste the key into **SendGrid key**.
10. Optionally fill **SendGrid webhook secret** (see the next article).
11. Click **Save**.
12. In **Settings → VisionScaper Marketing**, set **Send from address** on the authenticated domain.

Notes on what VisionScaper sends

- Plain text and HTML, a From name, reply-to, and unsubscribe headers.
- Open tracking and click tracking are turned off in the request.

Tips

- SendGrid also offers single sender verification as an alternative to domain authentication. That page's steps were not available.
- If your SendGrid plan has limits, they are SendGrid's. Prices are not repeated here.

If something goes wrong

- **403 or "does not contain a valid address".** The sender address is not authenticated.
- **Key rejected.** It lacks mail permission, or was copied with spaces.
- **Mail in spam.** Finish DKIM and add a DMARC record.

Sources

- Twilio SendGrid, API keys: https://www.twilio.com/docs/sendgrid/ui/account-and-settings/api-keys (read 2026-10-15)
- Twilio SendGrid, domain authentication: https://www.twilio.com/docs/sendgrid/ui/account-and-settings/how-to-set-up-domain-authentication
- Plugin: includes/messaging-providers.php.

SendGrid Event Webhook and secret

Add VisionScaper's address as a SendGrid Event Webhook, with a note about SendGrid's own signing method.

An Event Webhook lets SendGrid report delivery, bounces, spam reports and unsubscribes to your site.

> Warning: Read "Known gap". VisionScaper's signature test may not match SendGrid's.

Before you start

- SendGrid is set up (see "Get your SendGrid API key").

Steps

1. In the SendGrid console go to **Settings > Mail Settings**.
2. Under **Webhook Settings**, click **Event Webhooks**, then **Create new webhook**.
3. Switch **Enabled** on. Add a **Friendly Name** if you like.
4. In **Post URL**, enter your site's address ending `/wp-json/dreamscaper/v1/msg/webhook/sendgrid`. (The plugin registers this path. The screen does not print it for SendGrid. Not verified on screen.)
5. In **Actions to be posted**, tick: delivered, bounce, dropped, spam report, unsubscribe, group unsubscribe. These are the event names the code uses.
6. Look at **Security features**: Signature Verification and OAuth Verification. See the gap below.
7. Click **Test Your Integration** to send a sample, then **Save**.
8. Put your chosen secret into **SendGrid webhook secret** in **Settings → VisionScaper Messaging** and save.

What VisionScaper does

SendGrid event	Result
delivered	Marked delivered
bounce	Bounced; contact flagged
dropped	Failed
spamreport	Opt-out recorded
unsubscribe, group_unsubscribe	Opt-out recorded

Known gap: the signature check

- VisionScaper expects a header `X-Sendgrid-Signature` holding the hex HMAC-SHA256 of the body using the **SendGrid webhook secret**.
- SendGrid's page says it offers Signature Verification and OAuth Verification, but it does not name the headers here. Its signature feature is not described as a shared HMAC secret on that page, and I did not open the security-features page.
- So whether SendGrid can call VisionScaper successfully is unverified. Expect "Bad signature" (403) if not.
- Sending is unaffected.

Tips

- If your server does not answer with a 2xx status, SendGrid retries for up to 24 hours.
- Use a tunnel for local testing; localhost is not reachable.

If something goes wrong

- **403 in SendGrid's log.** See the gap.
- **No events.** The webhook is disabled or the wrong actions are ticked.

Sources

- Twilio SendGrid, Event Webhook setup: https://www.twilio.com/docs/sendgrid/for-developers/tracking-events/getting-started-event-webhook (read 2026-10-15)
- Plugin: includes/messaging-providers.php.

Get your Amazon SES access key, secret key and region

Create an IAM user for sending, make its access key, and enter the keys and region in VisionScaper.

Amazon SES is the third alternative email service in **Settings → VisionScaper Messaging**. VisionScaper signs its own requests to the SES API, so it needs an AWS access key ID, a secret access key and the AWS region. It does not use SMTP.

Before you start

- An AWS account.
- A verified domain or address in SES, in the same region (see the next article).
- Someone comfortable with AWS screens. AWS changes them often.

Steps

1. Pick the region where you will send, for example `us-east-1`. Keep it the same everywhere.
2. In the IAM console create a new user just for VisionScaper. AWS recommends a separate user for each use.
3. Give the user a policy that allows sending only. AWS's SES page shows this policy for API version 2: - Actions: `ses:SendEmail` and `ses:SendRawEmail` - A condition that `ses:ApiVersion` equals `2` - You can also limit the resource to your identity or a single From address.
4. Open the user's **Security credentials** tab. In the **Access keys** section choose **Create access key**.
5. On the "Access key best practices & alternatives" page choose your use case. AWS suggests alternatives to long-term keys. If you still need one, choose **Other**, then **Next**.
6. Optionally add a description, then choose **Create access key**.
7. On the **Retrieve access keys** page, choose **Show** or **Download .csv file**. AWS says this is your only chance to save the secret access key.
8. In WordPress open **Settings → VisionScaper Messaging**, section **Email**.
9. In **Email service**, choose **Amazon SES**.
10. Paste the access key ID into **Amazon access key** and the secret into **Amazon secret key**. Both are hidden fields.
11. Type the region in **Amazon region (like us-east-1)**. If left blank, the code uses `us-east-1`.
12. Fill **Amazon webhook secret** only if you set up event feedback (see the SMTP article for the gap).
13. Click **Save**.
14. In **Settings → VisionScaper Marketing** set **Send from address** to a verified identity.

Tips

- Each IAM user can have at most two access keys.
- Rotate the key if anyone who knew it leaves. Deactivate, check nothing breaks, then delete.
- The region you enter must be the region where your identity is verified.

If something goes wrong

- **Access denied.** The policy is missing `ses:SendEmail` or the condition blocks it.
- **Email address not verified.** The From address or domain is not verified in this region.
- **"MessageRejected" when sending to a stranger.** The account is still in the SES sandbox (see the sandbox article).

Sources

- AWS, IAM access keys: https://docs.aws.amazon.com/IAM/latest/UserGuide/access-key-self-managed.html (read 2026-10-15)
- AWS, SES access control policy for API v2: https://docs.aws.amazon.com/ses/latest/dg/control-user-access.html
- Plugin: includes/messaging-providers.php (SES API v2, signed requests, default region).

Verify your domain in Amazon SES

Create a verified identity for your sending domain in SES and add the DKIM records it shows.

SES will only send from an address or domain you have proved you own. This article creates that proof.

Before you start

- An AWS account and the region chosen in "Get your Amazon SES access key".
- Access to your domain's DNS.

Steps

1. Open the Amazon SES console in your chosen region.
2. Choose **Configuration > Identities**. (AWS's page also mentions a **Get started wizard** for first-time users.) The menu wording comes from AWS's overview page and its general console steps, so confirm on screen.
3. Choose **Create identity**.
4. For a whole domain choose Domain and type it. Keep Easy DKIM on, which AWS says is default and recommended. You can set a custom MAIL FROM domain if you want. Choose **Create identity**.
5. SES shows three DKIM CNAME records. Each looks like `token._domainkey.yourdomain.com` pointing to `token.dkim.amazonses.com`.
6. Add those records at your DNS provider.
7. Wait. DNS can take time, and AWS says SES may take up to 72 hours to show the domain as verified.
8. To verify one address instead, choose Email address, enter it, and click the link in the message SES sends.
9. Use an address on that domain in **Settings → VisionScaper Marketing → Send from address**.

Why verify the domain

- It lets any address at that domain be used.
- It signs your mail with DKIM, which helps inbox placement.
- Gmail and Yahoo expect a DMARC record for bulk senders. Add one at your DNS host.

Tips

- If your account is still in the sandbox, you must also verify each recipient address (see the next article).
- Verification is per region. If you change region, verify again.

If something goes wrong

- **Status stays pending.** The CNAME names or values were copied wrongly. Some DNS hosts add your domain to the end of the name; enter only the host part.
- **Mail still rejected.** The From address uses a different domain than the one you verified.

Sources

- AWS, verified identities overview: https://docs.aws.amazon.com/ses/latest/dg/verify-addresses-and-domains.html (read 2026-10-15)
- The AWS page "Creating and verifying identities" was not opened. The console steps above are AWS's general steps as summarized in the overview and should be checked on screen.

Move Amazon SES out of the sandbox

New SES accounts can only email verified addresses. Request production access to email customers.

A new Amazon SES account starts in a sandbox. In the sandbox you can send only to verified addresses (or the SES mailbox simulator), at a low daily and per-second limit. To email real customers you must ask AWS for production access.

Before you start

- A verified domain in SES. AWS says verifying a domain first tends to speed up approval.
- A working website and a clear idea of what you send.

What AWS asks for

Item	What to enter
Mail type	Marketing or Transactional (the type that describes most of your mail)
Website URL	Your business website
Additional contacts	Up to 4 email addresses
Contact language	English or Japanese
Acknowledgement	You send only to people who asked for email, and you handle bounces and complaints

Steps

1. Open the SES console in your region. The sandbox is set per region.
2. Choose **Account dashboard**.
3. In the sandbox warning banner choose **View Get set up page**, then **Request production access**.
4. Fill in the fields above and choose **Submit request**.
5. Wait. AWS says it replies within 96 hours at first. It may ask for more details.

Honest answers matter

VisionScaper sends marketing email on behalf of contractors. Say that. Describe how contacts agree to receive email and how unsubscribes work. VisionScaper adds an unsubscribe link and a one-click unsubscribe header to each marketing message, and records unsubscribes.

Tips

- While you wait, test with verified recipient addresses or the mailbox simulator.
- You cannot edit the request after submitting until the review is done.
- The sandbox limits AWS lists today are AWS's and can change.

If something goes wrong

- **Request denied.** Add detail about consent and bounce handling and apply again.
- **Still limited after approval.** Check that you changed the right region and that the account dashboard no longer shows the sandbox banner.

Sources

- AWS, request production access: https://docs.aws.amazon.com/ses/latest/dg/request-production-access.html (read 2026-10-15)

Amazon SES SMTP credentials versus API keys

VisionScaper needs an AWS access key and secret, not SMTP credentials. Here is the difference, plus a note on SES events.

AWS shows two kinds of sign-in for SES, and they look similar. Using the wrong one is a common mistake. This article explains both and what VisionScaper wants.

The difference

	SMTP credentials	API access key
User name	The access key ID	The access key ID
Password	A value derived from the secret key, not the secret itself	The real secret access key
Where it is used	Email programs and SMTP plugins	Programs that call the SES API
VisionScaper field	none	**Amazon access key** and **Amazon secret key**

AWS says the SMTP password is not your AWS secret access key. It is derived from it by an algorithm. VisionScaper signs its own API calls, so paste the real secret access key, not the SMTP password.

If you also need SMTP

Your WordPress SMTP plugin, if you use one for site mail, can use SES SMTP. AWS's steps are: open the SES console, choose **SMTP settings**, choose **Create SMTP Credentials**, enter a user name, choose **Create user**, then under **SMTP password** choose **Show**, and copy or download the values. The password is shown only once. SMTP credentials are region-specific. Use the SMTP endpoint for the same region, for example `email-smtp.us-east-1.amazonaws.com`. This does not feed VisionScaper's Messaging page.

SES events and VisionScaper

VisionScaper has an **Amazon webhook secret** field and registers an address ending `/wp-json/dreamscaper/v1/msg/webhook/ses`.

- SES sends events through Amazon SNS. SNS first sends a subscription confirmation that must be accepted. Each later notification wraps the SES event inside a `Message` field and is signed with an SNS certificate.
- VisionScaper reads a header `X-Ses-Signature` holding the hex HMAC-SHA256 of the body with your webhook secret, and reads the event at the top level of the JSON.
- That does not match what SNS sends. No code in the plugin that handles SNS subscription confirmation was found. Treat bounce and complaint feedback from SES as unverified. Sending works without it.
- Ask the VisionScaper team how to bridge SNS to this address before relying on it.

Tips

- If you leave the webhook secret blank, VisionScaper rejects incoming SES events.
- Keep a spreadsheet noting which keys belong to which service.

If something goes wrong

- **Authentication errors in VisionScaper.** You pasted the SMTP password. Create an access key (see "Get your Amazon SES access key").
- **SNS shows the subscription pending.** VisionScaper cannot confirm it automatically (unverified).

Sources

- AWS, SMTP credentials: https://docs.aws.amazon.com/ses/latest/dg/smtp-credentials.html (read 2026-10-15)
- AWS, monitoring sending activity (SNS events): https://docs.aws.amazon.com/ses/latest/dg/monitor-sending-activity.html
- Plugin: includes/messaging-providers.php (SES event parsing and signature check).

Get your QuickBooks Client ID and Client Secret

Create an app at Intuit's developer site, add VisionScaper's redirect address, and enter the keys under Connected apps.

VisionScaper connects to QuickBooks Online with an app you create yourself at Intuit's developer site. You get a Client ID and Client Secret, paste them into VisionScaper, then press Connect and sign in to QuickBooks.

> Note: Intuit's developer pages load with JavaScript and could not be read here. The steps below come from VisionScaper's built-in walkthrough plus two third-party guides that describe the Intuit screens. Treat Intuit screen names as unverified and follow what Intuit shows today.

Before you start

- A QuickBooks Online company. VisionScaper's page says QuickBooks Desktop is not supported (use CSV import and export).
- An Intuit developer account (sign in at developer.intuit.com with your QuickBooks login).
- The Contractor Hub with the Connected apps screen available on your plan.

Steps

1. In the Contractor Hub go to **Settings → Connected apps** and open the **QuickBooks Online** card. Open **Set-up walkthrough**. It prints the **Redirect address** and a **Webhook** address with a **Copy** button.
2. Sign in at `developer.intuit.com/app/developer/dashboard`.
3. Choose **Create an app**. VisionScaper's walkthrough says to pick QuickBooks Online and Payments, and the scope `com.intuit.quickbooks.accounting`. That is the only scope the plugin asks for.
4. Open the app's **Keys & credentials** area. A third-party guide says development keys are under Development settings and production keys under Production settings.
5. Under **Redirect URIs** add the address from step 1. It ends in `/wp-json/dreamscaper/v1/oauth/qbo/callback` on your site. It must match exactly. Third-party guides say to add it for both Development and Production.
6. For Production keys, Intuit asks you to finish a short app questionnaire first. A guide lists app details such as contact information, EULA and privacy-policy links, host domain, launch URL and disconnect URL, and some compliance questions. It says the keys stay locked until you submit.
7. Copy the **Client ID** and **Client Secret**.
8. Back in VisionScaper, in the QuickBooks Online card, paste them into **Client ID** and **Client secret**.
9. In **QuickBooks company**, choose **Production (my real company)** or **Sandbox (testing)**. This must match the key type.
10. Leave **How data moves** as you want: Import only, Export only, or Both ways.
11. Click **Save settings**.
12. Click **Connect QuickBooks Online**, sign in to Intuit, and pick your company. You return to VisionScaper with "Connected".
13. Click **Sync now** to bring customers across.

Tips

- Switching between Production and Sandbox needs a disconnect first.
- The tokens last only a short time; VisionScaper refreshes them. If permission expires, a banner says to tap **Reconnect**. Nothing is lost.
- The client secret field shows dots after saving. Leave it blank to keep the saved one.

If something goes wrong

- **"QuickBooks didn't accept the Client ID / secret (check Production vs Sandbox keys)."** Wrong key set for the chosen company type.
- **Intuit says the redirect URI is not valid.** It does not match the address on the walkthrough, or was added to the wrong key type.
- **"That sign-in link expired or was already used."** Press Connect again.

Sources

- Plugin: assets/js/contacts.js (Set-up walkthrough, field names); includes/integrations-qbo.php (scope, token address).
- Intuit OAuth page and "start developing" page: could not be read (JavaScript only).
- Third-party guide (Intuit screens): https://docs.mydbsync.com/cloud-workflow/2026_connectors_new/qbo/qbo_steps-subpage
- Third-party guide (dev vs production settings): https://developers.getknit.dev/docs/quickbooks-oauth-guide

QuickBooks webhook and Security key

Optional setup that makes QuickBooks tell VisionScaper right away when a customer or invoice changes.

Without a webhook, VisionScaper syncs on its own schedule. With one, QuickBooks tells VisionScaper when something changes and a sync starts soon after. It is optional.

> Note: The Intuit developer pages could not be read. The Intuit screen names below come from VisionScaper's own walkthrough and are unverified. The signature method is from the plugin code.

Before you start

- QuickBooks is connected (see "Get your QuickBooks Client ID and Client Secret").

Steps

1. In the Contractor Hub go to **Settings → Connected apps → QuickBooks Online → Set-up walkthrough** and copy the **Webhook** address. It ends in `/wp-json/dreamscaper/v1/qbo/webhook`.
2. In your app on developer.intuit.com open **Webhooks**. The walkthrough says to add an endpoint with the **Customer** entity. A third-party guide notes the webhook is configured in the Production section.
3. Paste the address. Intuit shows a key (the verifier token). Copy it.
4. Back in the QuickBooks Online card, paste it into the field **Security key** (the placeholder reads "Security key (optional)"; older wording called it a Verifier token).
5. Click **Save settings**.
6. Change a customer in QuickBooks and watch for VisionScaper to catch up.

What triggers a sync

The code looks for changes to these QuickBooks records: Customer, and (for money sync) Invoice, Payment and Item. Customer changes start a customer sync. The others start the money sync if it is turned on. If you add only the Customer entity as the walkthrough says, money changes will not reach VisionScaper by webhook. Add Invoice, Payment and Item too if you use money sync (not verified against Intuit's screens).

How the secret is checked

VisionScaper checks Intuit's `intuit-signature` header. It computes a base64 HMAC-SHA256 of the raw body using your Security key. A wrong or empty key answers 401. This matches how Intuit signs webhooks, as far as the code shows.

Tips

- Keep the Security key private.
- If you skip this, nothing breaks. The scheduled sync still runs.
- The Security key is stored scrambled.

If something goes wrong

- **Intuit shows the endpoint as failing.** Wrong address, or HTTPS is not working.
- **Webhooks reach the site but nothing syncs.** The Security key does not match, or the company is not connected.

Sources

- Plugin: assets/js/contacts.js (walkthrough and field); includes/integrations-qbo.php (dreamscaper_rest_qbo_webhook).
- Intuit developer pages were unreachable (JavaScript only), so Intuit screen names are unverified.

Get your Xero Client ID and Client Secret

Create a web app at Xero's developer site, add VisionScaper's redirect address, and connect your organisation.

VisionScaper connects to Xero through an app you make yourself. You create the app, copy its Client ID and secret, and paste them into VisionScaper. Xero's own plan costs are Xero's. VisionScaper adds no fee for this.

> Warning: Check the scope note below before you start. Xero changed how new apps get permissions in 2026.

Before you start

- A Xero organisation you can sign in to.
- A free developer account at developer.xero.com.
- The Contractor Hub screen **Settings → Connected apps** with the Xero card available on your plan.

Steps

1. In the Contractor Hub open **Settings → Connected apps** and find the Xero card. It prints a redirect address, ending in `/wp-json/dreamscaper/v1/oauth/xero/callback` on your site. Copy it.
2. Go to `developer.xero.com/app/manage` and make a new app. VisionScaper's card says: "make an app (type: web app)." Xero's own docs list the integration types as web app, standard authorization code, PKCE and custom connection. Xero requires an HTTPS redirect address.
3. Add the copied address as the app's redirect address.
4. Get the Client ID. Generate a Client secret. Xero says the secret is shown only once, so copy it now.
5. In the VisionScaper Xero card, paste them into **Client ID** and **Client secret**. The secret is stored scrambled and never shown again.
6. Click **Save keys**.
7. Click **Connect to Xero**, sign in, and choose your organisation. If you have several, pick one in **Xero organisation** afterwards.
8. Set **Xero account for sales** (Xero's usual one is 200) and **Xero bank account for payments**. Use **Look up my Xero accounts** to pick from your lists. Click **Save settings**.

Scopes VisionScaper asks for

`offline_access`, `accounting.transactions`, `accounting.contacts` and `accounting.settings.read`.

Scope note: Xero's 2026 change

Xero's developer pages say apps created on or after 2 March 2026 use new granular scopes. For example, `accounting.invoices` replaces the broad `accounting.transactions`. Older apps keep their broad scopes until they move, with a deadline of September 2027. Contacts and settings scopes are unchanged.

VisionScaper still asks for `accounting.transactions`. Whether a brand-new Xero app can approve that scope is not verified. If Xero shows an "invalid scope" error when you press Connect, stop and report it to the VisionScaper team. Do not change settings in Xero to work around it.

Tips

- Changing keys after connecting needs a reconnect.
- If Xero asks you to sign in again, a banner says "Xero needs you to sign in again" with a **Reconnect** button.
- Records already sent to one organisation are not resent to another.

If something goes wrong

- **Xero says redirect mismatch.** The address in the app differs from the one on the card.
- **"Xero is not part of your current plan."** Your VisionScaper plan does not include it.
- **Connect works but nothing syncs.** The sales or bank account code is blank.

Sources

- Xero, standard authorization code flow: https://developer.xero.com/documentation/guides/oauth2/auth-flow/ (read 2026-10-15; only an outline loaded)
- Xero, OAuth 2.0 overview: https://developer.xero.com/documentation/guides/oauth2/overview/

- Xero, granular scopes FAQ: https://developer.xero.com/faq/granular-scopes
- Xero Developer blog, scope changes: https://devblog.xero.com/upcoming-changes-to-xero-accounting-api-scopes-705c5a9621a0
- Xero's "getting started" page did not load, so exact button names in Xero's app form are unverified.
- Plugin: assets/js/xero.js; includes/modules/xero.php.

Make a VisionScaper access key for Zapier

Create an access key in the Contractor Hub and get ready to use it in Zapier.

VisionScaper has no published Zapier app, and the Hub says so. You connect with Zapier's **Webhooks by Zapier** (or your own private Zapier app) using an access key from VisionScaper. This article makes the key.

Before you start

- The Contractor Hub, and a plan that includes access keys. The plan's hourly request limit is a placeholder, not approved.
- A Zapier account. Zapier lists Webhooks by Zapier as a Premium app. Check Zapier for what your plan includes.

Steps

1. Open the Contractor Hub and go to **Settings → Connect other tools** (address `#/settings/api`).
2. Click the tab **Access keys**.
3. Under **Make a key**, in **What will use it?**, type a name such as "Zapier". The box holds up to 80 characters.
4. Under **What may it do?** tick the boxes you need. The real choices are:

Box	Lets the key
Look at customers and leads	read customers and leads
Add and change customers	create and update customers
Look at quotes	read quotes
Look at invoices	read invoices
Look at jobs	read jobs
Add new leads	create leads
Look at payments	read payments
Set up alerts (needed by Zapier)	create the alert subscriptions Zapier uses

5. Tick **Set up alerts (needed by Zapier)** plus the "Look at" box for each thing Zapier should react to (see the next article).
6. Click **Make a key**. You must tick at least one box, or you see "Choose at least one thing this key may do."
7. A box titled **Copy your new key now** appears. Click **Copy key**. The key starts with `vsk_`. It is shown only once.
8. Paste it into a password manager, then click **I have saved it**.

Your keys list

Each key shows its name, the first characters, what it may do, when it was last used and how many times. **Turn off** disables a key at once. You can have up to 20 active keys.

Tips

- Use one key per tool so you can turn one off without breaking others.
- Choose only what the Zap needs.
- If you lose the key, turn it off and make another.
- The rest of Zapier is in "Use VisionScaper with Zapier".

If something goes wrong

- **No Connect other tools screen.** Your plan may not include it. The Hub shows a message if so.
- **"You have 20 active keys."** Turn one off.
- **Zapier gets 401.** The key was copied wrongly or was turned off.
- **Zapier gets 403 "insufficient scope".** The key lacks the needed box.

Sources

- Plugin: assets/js/api-platform.js (labels, Zapier steps); includes/modules/api-platform.php (key format, scopes, limits).
- Zapier, Webhooks by Zapier: https://zapier.com/apps/webhook/integrations (read 2026-10-15)

Use VisionScaper with Zapier

Use Webhooks by Zapier with your access key to react to VisionScaper events or add leads and customers.

Once you have an access key, Zapier can do two things. It can react when something happens in VisionScaper, or it can add leads and customers to VisionScaper.

> Note: Zapier's own help pages could not be opened here, so Zapier's screen names below come from VisionScaper's built-in guide and Zapier's product page. Exact Zapier labels are unverified.

Before you start

- A VisionScaper access key with **Set up alerts (needed by Zapier)** ticked (see "Make a VisionScaper access key for Zapier").
- The three addresses from **Settings → Connect other tools → Zapier**: **Subscribe address**, **Unsubscribe address**, and **Sample address**. Each has a copy box. The tab **How it works** shows the **Starting address**.

Events you can use

Event	When it fires	Key needs
`lead.created`	A new lead comes in	Look at customers and leads
`customer.created`	A customer is added	Look at customers and leads
`quote.sent`	A quote is sent	Look at quotes
`quote.accepted`	A quote is accepted (signed)	Look at quotes
`job.completed`	A job is marked done	Look at jobs
`invoice.paid`	An invoice is paid	Look at invoices

Steps: react to VisionScaper

1. In Zapier add a step using **Webhooks by Zapier** (or a private Zapier app) and choose **Custom Request**, as VisionScaper's guide says.
2. Send a POST to the **Subscribe address**.
3. Add a header named `Authorization` with the value `Bearer` then your key (the word Bearer, a space, the key).
4. In the body, send an `event` (one of the names above) and the address Zapier gave you for that trigger, as `target_url` (`hookUrl` also works). Keep the body JSON.
5. VisionScaper answers with an id. Keep it for the unsubscribe step.
6. When the Zap is turned off, send a POST to the **Unsubscribe address** with the same header and the `id`.
7. To test before real data exists, GET the **Sample address** followed by the event name (for example `lead.created`). It lists your newest real records, or one marked example.

Steps: add a lead or customer

1. Use a Custom Request with a POST to the leads or customers address shown on the **How it works** tab.
2. Add the same `Authorization: Bearer <key>` header and send JSON.
3. A person with the same email or phone is never added twice. VisionScaper tells you who already exists. Add an `Idempotency-Key` header so a retry does not duplicate.

Things to know

- VisionScaper retries a failed alert after 1 minute, 5 minutes, 30 minutes, 2 hours and 6 hours, then gives up. After 10 failures in a row the alert is switched off and you are emailed.
- Zapier's Zap-off signal (a 410 answer) removes the subscription.
- Over the hourly limit you get 429 with a Retry-After header. If the plan has none, you get 402. The limit is a placeholder, not approved.
- Alerts are signed with `X-VisionScaper-Signature: t=<time>,v1=<code>`. The code is HMAC-SHA256 of `<time>.<body>` using the alert's signing secret.

If something goes wrong

- **404 invalid_event.** The event name has a typo.
- **403 insufficient_scope.** Tick the matching "Look at" box on the key.

- **Nothing fires.** Check that the subscription shows under **Alerts to other tools** with "From Zapier" and "On".

Sources

- Plugin: assets/js/api-platform.js; includes/modules/api-platform.php (routes zap/subscribe, zap/unsubscribe, zap/poll).
- Zapier, Webhooks by Zapier: https://zapier.com/apps/webhook/integrations (read 2026-10-15)