

FIELDPROOF

User Manual

From site visit to Word report: customers, sites, jobs, visits, areas, observations, evidence and reports.

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1. How FieldProof organises your work

FieldProof keeps every record in context. That structure is what lets it build the report for you instead of making you sort photos after the visit:

Level	What it is	Example
Customer	The organisation you work for.	Hotel Riverside
Site	A persistent location of the customer (building, facility, address).	Main Building
Job	The piece of work, with its own reference (JOB-0001...).	JOB-0142 · Building inspection
Visit	Each trip to site, with date, inspector and status.	Initial inspection · 12/03/2026
Area	A zone within the visit where you record what you see.	Roof, Room 204
Observation	What you found: description, severity, recommendation.	Water stain on ceiling
Evidence	A photo or PDF document linked to the observation or area.	room-204-ceiling.jpg
Report	A Word document for one or several visits.	HOTEL-RIVERSIDE-R01.docx

Roles

Role	Can do
Owner	Everything, including billing and the plan. The organisation always keeps at least one active owner.
Administrator	Team, storage, Word templates, organisation identity and all day-to-day work.
Manager	Day-to-day work and deleting customers, sites, jobs, visits and reports; workspace settings.
Technician	Create and edit records, carry out visits, add observations and evidence, generate reports.
Viewer	Consult records and download reports without changing anything. Does not use a plan seat — suitable for customers.

2. Signing in

Sign in with your Google or Microsoft account. FieldProof has no password of its own and no e-mail sign-in link.

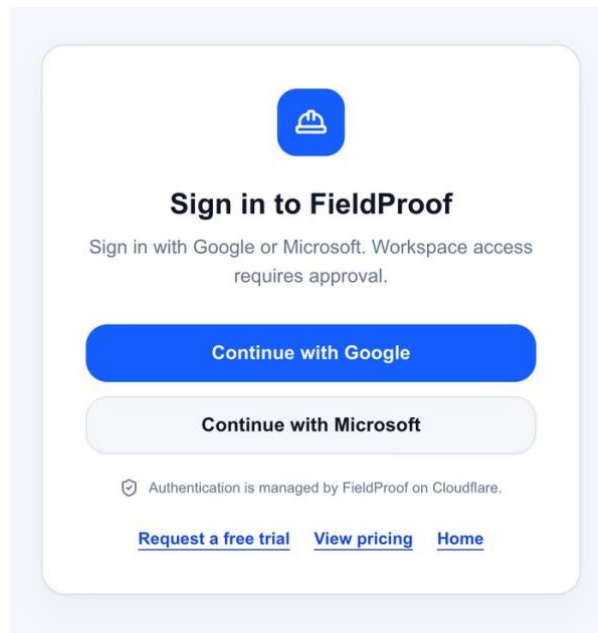


Figure 1 – Sign-in screen.

- **New organisation:** request a free trial on the website (or sign in and submit the request). During the preview each request is approved manually; you get access only afterwards.
- **Joining a team:** an administrator pre-authorises your e-mail on the Team page. With Google, access activates when you sign in with that e-mail. With Microsoft, the administrator shares a secure invitation link with you, valid for 7 days and single-use.
- **Several organisations:** if you belong to more than one, always check the active organisation before creating or changing records.

Important. No invitation e-mail is sent automatically. Use exactly the address that was authorised.

3. Dashboard and navigation

The Dashboard shows jobs in progress, visits in progress, reports to generate and open high or critical observations (with a direct link to the list). The menu at the top right opens Customers, Sites, Jobs, Visits, Reports, Templates, Team, Pricing and Settings. Every list has search, filters, sorting and pagination.

4. Customers and sites

Create the customer and its sites before the job. A customer can have several sites; each site shows its open jobs. Customers and sites can be edited at any time from the list.

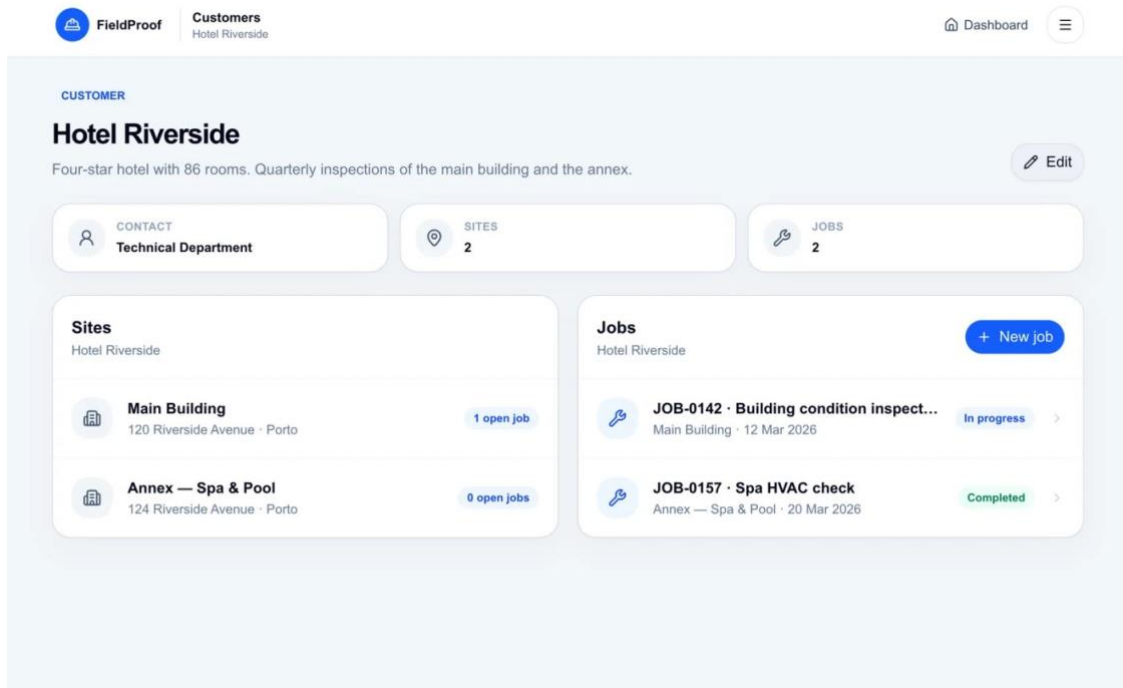


Figure 2 – A customer with two sites and their jobs.

Good practice. Search before you create. Reusing the same customer and site keeps the visit history together.

5. Jobs

In Jobs › New job choose the customer and the site (you can create them without leaving the form), then enter the title, description and, if you want, the planned date. You can create the job and start the visit straight away.

The job page brings together:

- Customer, site and planned date.
- All visits, filtered by status (in progress / completed).
- All observations from the visits, with photos, a visit filter and pagination (20 or 50 per page).
- The report versions already generated and the Generate Word report button.

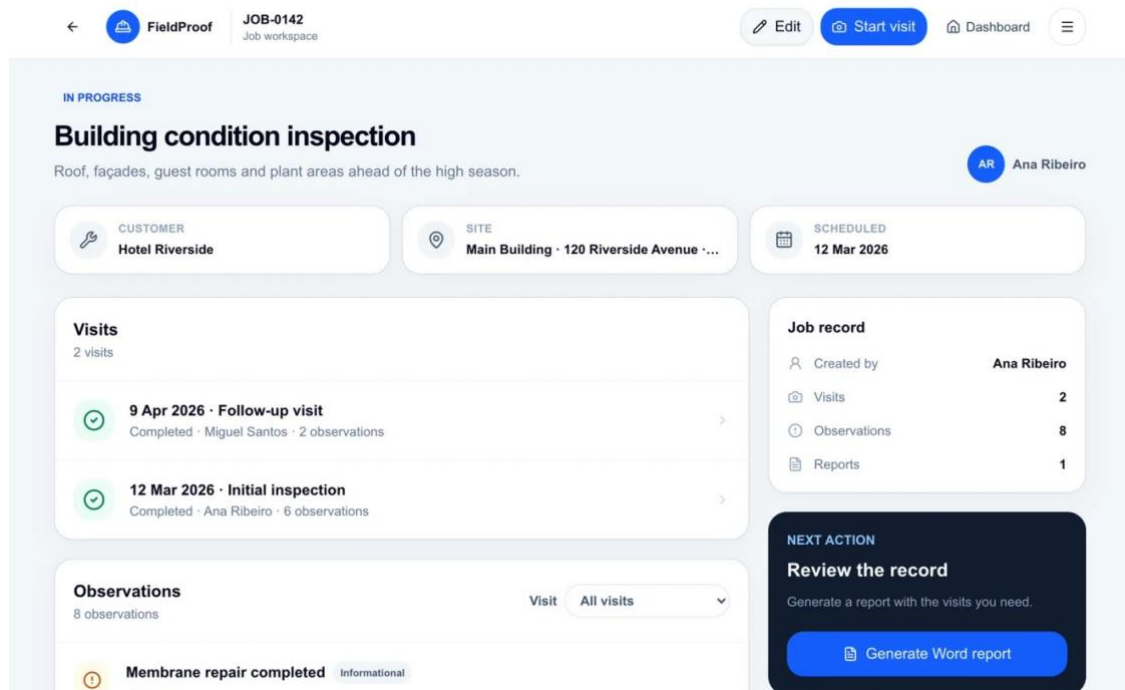


Figure 3 – A job with two visits and observations from both.

6. Visits and areas

In Start visit choose the site — by default the job's site, but it can be another site of the same customer. The visit opens with one area named after the site; create the areas you need (New area), for example Roof, North façade, Room 204. Drag to reorder them.

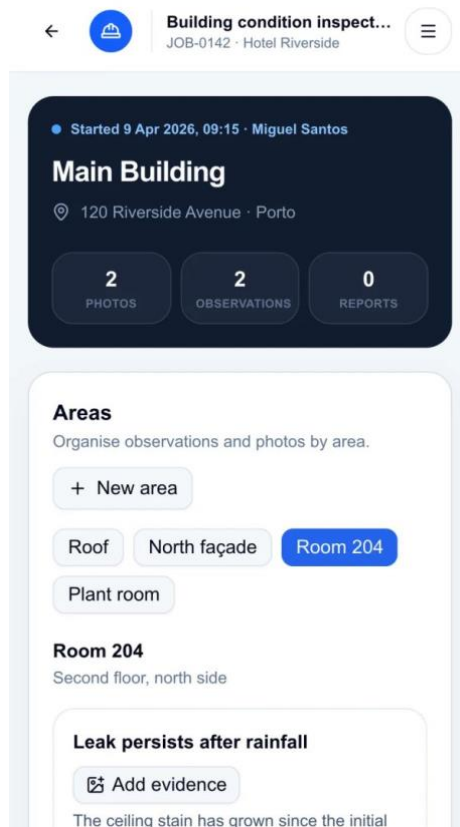


Figure 4 – A visit on a phone: areas and the records of the selected area.

- **General notes:** context that applies to the whole visit (access, weather...). Use Save.
- **Complete visit:** locks the record (it becomes read-only) and makes the visit available for reports.
- **Clone visit:** on a completed visit, creates a new open visit with the same areas and blank checklists — ideal for follow-up visits or periodic inspections. Old observations, answers and photos are not copied.

7. Observations and evidence

1. **Add photo** opens the phone camera. The photo goes to the selected area; the original is stored unchanged, with uploader, date and a SHA-256 integrity hash.
2. **Add observation:** title, description, area, specific position, severity (informational to critical) and recommendation. Keep Attach latest uploaded photo ticked to link the photo you just took.
3. **Add evidence** (on an observation card) or Add photo or PDF (in an area's general evidence) lets you pick photos from the gallery or PDF documents, up to 15 MB.

Figure 5 – New observation with the photo attached.

- A photo can be moved to another observation or area (pencil icon on the evidence); the original file is not changed.
- General evidence is a photo of the area with no specific observation.
- PDF documents stay attached to the observation or area, but the Word report includes photos only.

Quality of evidence. Describe observable facts (“damp stain about 40 cm wide next to the window frame”) and leave causes for the recommendation unless they are confirmed.

8. Checklists

In Templates create checklists with sections and items (Compliant / Non-compliant / N/A, Yes / No / N/A, text, number or choice). FieldProof includes the example “Inspeção Geral”. In the visit, tap Checklist to apply one to the selected area and answer item by item.

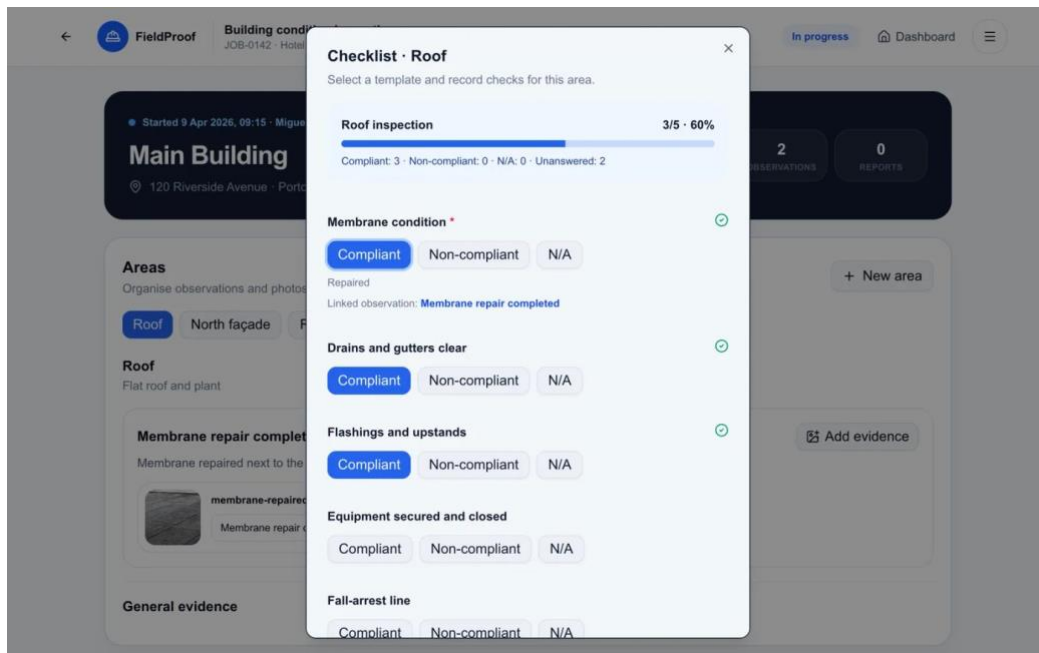


Figure 6 – A checklist applied to the Roof.

- A Non-compliant item can create an observation (Create observation).
- Editing a template does not change checklists already applied.
- Results go into the “Checklists” chapter of the report.

9. Word reports

Reports can include completed visits only. In Reports › Generate report (or from the job):

1. Choose the customer.
2. Select the jobs, sites and visits to include — one visit, several visits or several jobs of the same customer.
3. Choose the Word template (official in English, official in Portuguese, or one of your organisation's).
4. Generate the report and download the .docx.

← Reports

Generate Word report

Choose the completed jobs, sites and visits to include.

CUSTOMER
Hotel Riverside

Report scope [Select all](#) [Clear](#)

☒ **JOB-0142 · Building condition inspection**

☒ **Main Building**

☒ Visit 01 — 12/03/2026 · Initial inspection

☒ Visit 02 — 09/04/2026 · Follow-up visit

☒ **JOB-0157 · Spa HVAC check**

☒ **Annex — Spa & Pool**

☒ Visit 01 — 20/03/2026 · Technical check

Word template
FieldProof Professional (English) · Official template

Figure 7 – Report scope: two visits of one job and the visit of another.

The document has a cover with your organisation's logo and details, identification and scope, methodology, checklists, observations and photos organised by job › site › visit › area (numbered observations, evidence E001, E002...), conclusions with the recommendations, and signature blocks.

HOTEL-RIVERSIDE-R01.docx
FieldProof Professional (English) · v1 · 3 visits · 9 observations

[Download DOCX](#)

Norte Technical Inspections
Consolidated inspection report · HOTEL-RIVERSIDE-R01

4. Observations and photos

Records are grouped by site and area, bringing together the observations and evidence collected during the inspection.

JOB JOB-0142

4.1 Building condition inspection

Roof, façades, guest rooms and plant areas ahead of the high season.

SITE
4.1.1 Main Building
120 Riverside Avenue · Porto

VISIT V01 12/03/2026 · Inspector: Ana Ribeiro

Roof access escorted by the maintenance manager. Dry weather.

AREA Roof

Obs. 1 Damaged membrane next to drain

SEVERITY High **DATE** 12/03/2026

Localised tear in the bituminous membrane, exposing the layer below.

Photographic evidence

EVIDENCE
E001
DATE 12/03/2026

Figure 8 – The “Observations and Photographs” chapter.

- **Versions:** every generation creates a new version (R01, R02...) that is never changed; earlier ones remain available.
- **Reference:** JOB-0142-R01 for one job; HOTEL-RIVERSIDE-R01 for several jobs of the same customer.
- **Limit:** Starter and the free trial allow 2 reports per calendar month; the other plans have no monthly cap.

- **Editing:** the .docx can be edited in Word. If you correct data in FieldProof, generate a new version.

10. Word templates and organisation identity

- **Official templates:** FieldProof Professional (English) and FieldProof Professional (Portuguese). They are read-only.
- **Your own template:** in Settings › Report templates download the official template, customise it in Word keeping the {{...}} fields, and import your copy. FieldProof validates the file before saving it and can generate a test from an existing report. Each replacement creates a new template revision.
- **Default template:** an administrator chooses the template used by default for the whole team.
- **Identity:** in Settings › Organization upload the logo and fill in address, e-mail, phone and website; they appear on the cover and header of reports.

11. Storage

By default files are kept in FieldProof's private storage. An owner or administrator can connect Google Drive, Microsoft OneDrive (work or personal account) or a Microsoft SharePoint library in Settings and choose Use for new files.

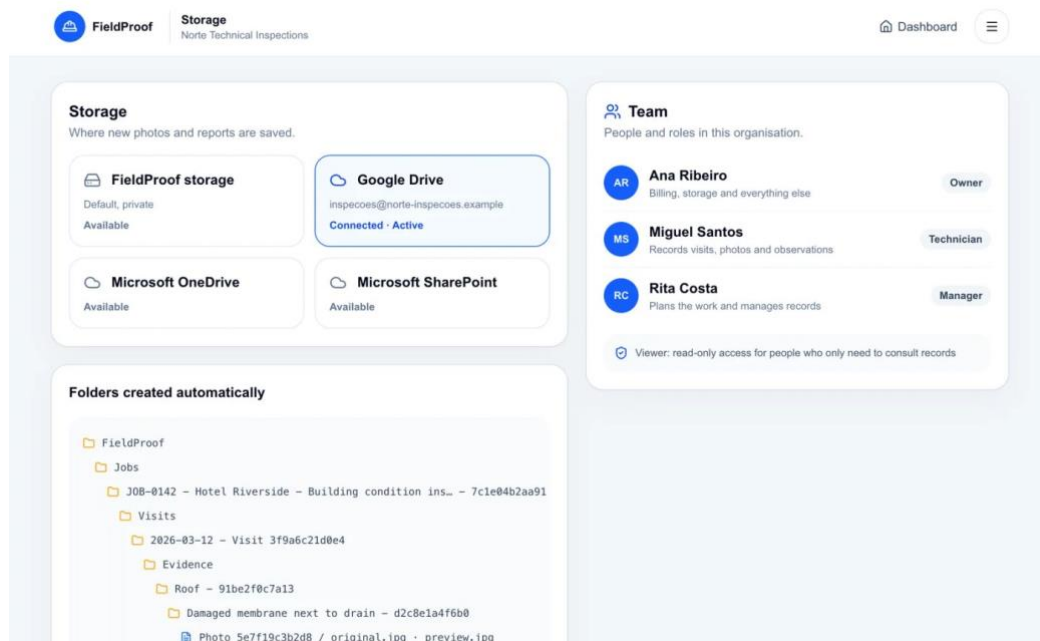


Figure 9 – Storage destinations and automatically created folders.

- Folders are created automatically: Jobs › <job> › Visits › <visit> › Evidence › <area> › <observation>, and reports in Reports under the visit, the job or Customers › <customer> when they span several jobs.
- Changing destination only affects new files; existing ones stay where they were saved.
- Disconnecting a connection never deletes files. If “Files temporarily unavailable” appears, reconnect the same account and folder.

12. Team, plan and billing

- **Add a user:** Team › e-mail + role › Add. The user is pre-authorised until they sign in.
- **Suspend / reactivate:** a suspended user loses access immediately; reactivating them uses a seat again.
- **Plan seats:** Starter, Individual and the trial: 1 user; Team: 5; Business: 15; Enterprise: by agreement. Active and pre-authorised users count; viewers (read-only) and suspended users do not. Additional Team/Business users (€10/user/month) are added on request. The Team page shows how many seats are in use.
- **Billing:** only the owner sees and manages the subscription (Settings › Billing), with payment and plan changes handled by Stripe.

13. Good practice

- Create the context (customer, site, job) before you go on site.
- Create the areas at the start of the visit and work area by area.
- Photograph the overview first, then the detail.
- Attach each photo to its observation the moment you take it.
- Use short, consistent titles; the title appears in the report and in captions.
- Everyone uses their own sign-in; review the team periodically.

Before completing a visit

- Areas created and holding the right records
- Observations with area, severity and, where useful, a recommendation
- Photos attached to observations
- Checklist answered
- General notes saved
- Visit completed

14. Troubleshooting

Situation	What to do
I sign in but see “no access”	The request is still awaiting approval, or your e-mail is not authorised. Check the exact address with your administrator.
The Microsoft invitation does not work	The link expires after 7 days and can be used once. Ask the administrator for a new link and use the account with the invited e-mail.
I cannot edit	Check your role (viewers are read-only) and whether the visit has already been completed.

Situation	What to do
I cannot add users	The plan has no free seats. Suspend people who no longer need access, use the viewer role for read-only access, or change plan.
I cannot generate the report	Only completed visits are included. On Starter/trial, check whether you have already used the 2 reports for the month.
The upload does not finish	Check your connection; JPEG, PNG, WebP or PDF up to 15 MB. Use Retry.
Files unavailable	The storage connection holding them was disconnected. Reconnect the same account and folder in Settings.

15. Quick guide — from site to Word

1. New job: customer, site, title.
2. Start the visit and create the areas.
3. In each area: Add photo → Add observation.
4. Answer the checklist.
5. Complete the visit.
6. Generate report: choose visits and template.
7. Download the .docx, review it and send it to the customer.