

LIQUID RENOVATIONS

— TOOL KIT —

All-in-one job scheduling, crew management, materials tracking, and field operations for your entire Liquid Renovations team.



Manage Jobs

Create, assign, and track every pool job from scheduling through completion.



Coordinate Crews

Drivers, Crew Leads, and Plaster teams — each with their own portal view.



Track Performance

Builder analytics, activity logs, and Google Drive photo storage.

LR TOOL KIT

Staff & Administrator Guide

Complete Reference for Drivers, Crew Leads, Plaster Crews & Admin

LR TOOL KIT

Field operations — organized in one portal.

The LR Tool Kit is Liquid Renovations' central hub connecting job management, crew portals, materials tracking, Google Drive photo storage, and performance analytics into a single mobile-friendly system for everyone on the team.

	View and manage all jobs by date. Every job card shows the address, crew assignment, materials, and status.
	Role-specific views for Drivers, Prep/Detail crews, and Plaster crews — each showing only what's relevant to that role.
	Track materials per job with quantities, mixes, and per-bag ratios. Crew leads check off received materials in real time.
	Builder performance charts, activity logs, and job type distribution — all visible from the Admin Dashboard.

Platform Overview

Feature	What It Does	Who Uses It
Schedule Manager	Full calendar view of all jobs with day-by-day cards, date navigation, and search	Admin, Managers
Driver Portal	Materials-to-load checklist, photo/video upload, delivery tracking	Drivers
Prep Detail Portal	Prep and detail job cards with materials, photos, and crew actions	Prep Crew
Plaster Crew Portal	Materials received checklist, issue reporting, photo upload per job	Plaster Crew Leads
Job Report Portal	Full detail view for any job with crew report, photos, and print function	Admin, Supervisors
Admin Dashboard	KPI cards, today's schedule, builder performance analytics, activity log	Admin Only
Google Drive Sync	Photos and videos auto-upload to Builder > Job folder structure in Drive	All Field Staff
Google Calendar Import	Sync jobs from Google Calendar including title, date, address, and materials	Admin Only

CREW PORTALS

Five role-based portals — one for every job function.

Every portal shows only what that role needs. Staff log in with their name and a 4-digit PIN. The page automatically loads today's jobs with full card details.

■ Schedule Manager

Role: **MANAGER / ADMIN**

- Full 7-day date navigation with click-to-select day
- All jobs for selected date shown as expandable cards
- Search bar filters by address, title, crew, or type
- Print Day Sheet generates a clean run sheet for the day
- Day Map opens Google Maps with all job pins
- Each card shows: type badge, title, address, lead, driver, builder, region, material selection, mixes, materials list, photos, and crew action form

■ Driver Portal

Role: **DRIVERS**

- Materials To Load checklist — check off each item as loaded
- Material Used section with + Add More rows for reporting
- Upload Photo and Upload Video buttons for job documentation
- Issues? and Photos? checkboxes for status reporting
- LOADED button marks delivery complete and updates job status
- Print Details generates a job detail sheet

■ Prep | Detail Portal

Role: **PREP CREW**

- Shows all prep and detail jobs for selected date
- Materials (Check Received) section with checkboxes
- Material Used section with quantity tracking
- Upload Photo for on-site documentation
- Comments/notes field for special instructions
- RECEIVED action button completes the job record

■ Plaster Crew PortalRole: **PLASTER CREW LEADS**

- Full mixes header: MIXES count + product name (e.g. 8 MIXES PS FRENCH GREY)
- Materials check-received list with per-bag ratios in parentheses
- Issue and photo confirmation checkboxes
- Material Used with Add More for multi-product tracking
- Upload Photo captures on-site progress images
- RECEIVED button closes out the crew record

■ Job Report PortalRole: **SUPERVISORS / ADMIN**

- Full job detail card with all metadata and crew report
- Materials section with check states from crew
- Photos and videos uploaded by field staff
- Crew Report section captures notes, issues, and used materials
- Print button generates a printable full-detail report
- Region shown by descriptive areas (e.g. Summerville, N. CHS)

JOB CARDS

Every job card — what you see and how to read it.

Job cards are the core display unit of every portal. They pull live data from the database and calendar imports, and display information relevant to the logged-in role.

Anatomy of a Job Card

Card Element	What It Shows	Notes
Type Ribbon	Color-coded bar at top: PLASTER, PREP, ACID WASH, RENO, etc.	Auto-detected from job title
Job Title	Full job title including crew assignment and product (e.g. PLASTER) VICTOR-1 Heritage: Evans (PS FRENCH GREY)	Imported from Google Calendar or entered manually
Job Order Badge	Shows order for the day: 1st, 2nd, 3rd, etc.	Set by admin on job edit page
Status Badge	Scheduled / In Progress / Completed	Updated by crew action buttons
Address	Clickable — opens Google Maps for directions	Auto-geocoded from job record
Lead / Driver / Builder	Assigned staff names and builder company	Assigned in admin job edit
Material Selection	Shows mixes count and product name: 8 MIXES PS FRENCH GREY	Parsed from job notes for calendar imports
Materials To Load	Full list with quantities and per-mix ratios in parentheses: 80 bags prism blue ps (10)	Driver view has checkboxes; crew view is read-only
Photos / Videos	Thumbnails of uploaded files from Google Drive	Uploaded by field staff via Upload Photo/Video
Crew Action Form	Issues?, Photos?, Material Used, Used Materials List, Comments, and action button	Driver: LOADED Plaster/Prep: RECEIVED
Region Footer	Color bar at bottom showing region area description (e.g. Bluffton / Hardeeville)	Color comes from region settings

Daily Navigation

The 7-day date navigator at the top of every portal lets you tap any day to view that day's jobs. Today is always highlighted. Use Prev/Next arrows to move week by week. The date picker below the nav allows jumping to any date directly.

Print Functions

Print Option	What It Prints	Where to Find It
Print Details	Single job card: title, date, status, location, crew, materials list, notes	Bottom of every job card
Print Day	Full run sheet for the day: all jobs with addresses and materials list	Top of Schedule / Driver portal
Job Report Print	Full detail report with crew report, photos, and materials	Print button in Job Report portal

All print windows include a sticky ← Close & Return bar at the top for easy navigation back to the portal.

MATERIALS & MIXES

How materials flow from the office to the field.

Every job tracks its materials in two systems: the structured job_materials table for manually entered jobs, and the notes/title text for calendar-imported jobs. The portal reads both and displays them consistently.

How Mixes Are Displayed

Data Source	How It's Stored	How It Displays
Manually entered job	mixes_count and mix_name columns in database	Read directly: "8 MIXES PS FRENCH GREY"
Calendar import	Embedded in job notes text: "8 MIXES PS FRENCH GREY\n80 bags..."	Parsed with regex — same display output
No mixes set	mixes_count = 0, no match in notes	No mixes header shown; just materials list

Per-Bag Ratios

When a job has mixes_count > 0 and materials with bag quantities, the portal automatically calculates and displays the per-bag ratio in parentheses next to each material item. Example: **80 bags prism blue ps (10)** — this means 80 bags ÷ 8 mixes = 10 bags per mix.

Material Used — Crew Reporting

After the job, crew leads and drivers fill out the Material Used section at the bottom of each card. Use the dropdown to select the product, enter a quantity, and tap + Add More for additional materials. This data is captured in the job notes when the LOADED or RECEIVED button is tapped.

Field	Purpose
Material Used dropdown	Select any product from the full materials library
Qty field	Enter quantity used (supports decimals for gallons)
+ Add More button	Adds another material/qty row for multi-product jobs
Comments box	Free text field for special notes, issues, or messages to admin
Issues? checkbox	Flags the job as having an issue — visible in crew report
Photos? checkbox	Confirms photos were taken on site

How Material Checkboxes Work (Driver)

In the Driver portal, each material row in the Materials To Load section has a checkbox. When a driver taps a checkbox, the system immediately saves the checked state to the database (is_loaded = 1). The item text gets a strikethrough style to confirm it's loaded. This state persists — if the driver closes and reopens the app, checked items remain checked.

STAFF & ACCESS

Staff sign-in, roles, and portal access.

Field staff (Drivers and Crew Leads) log into the frontend portals using their name and a 4-digit PIN. Admins and managers log in with their WordPress username and password. There is no shared password — each person has their own credentials.

PIN Login for Field Staff

Step	Action
1	Navigate to any portal URL (e.g. kit.liquidrenovations.com/driver/)
2	Enter Your Name in the first field (partial match works — e.g. "Victor" or "Adrian")
3	Enter your 4-digit PIN in the PIN field
4	Tap Sign In — the portal loads immediately with today's jobs
Need a PIN?	Contact admin. Admins set PINs in LR Toolkit → Staff → Edit Staff Member

Staff Positions and Portal Access

Staff Position	Portal Access	Key Functions
Driver	Driver Portal	Load materials checklist, photo/video upload, LOADED action
Crew Lead	Schedule + Plaster Crew	View full schedule, check received materials, RECEIVED action
Plaster Crew	Plaster Crew Portal	Materials received, issue reporting, photo upload
Prep Crew	Prep Detail Portal	Prep job cards, materials, photos, RECEIVED action
Supervisor / Manager	All portals + Job Report	Full view access, print reports, view crew reports
Admin (WordPress user)	All portals + Admin Dashboard	Full management: create jobs, manage staff, view analytics

Photo Upload

Any staff member can upload photos from the job card. Tap **Upload Photo** — your device's camera opens. Take the photo, and it uploads directly to Google Drive in the correct folder. The folder structure is automatically created: **Root** → **Builder Name** → **Job Title | Builder**. Photos appear on the job card immediately after upload.

ADMIN — JOBS & DASHBOARD

Managing jobs from the back office.

The admin side of LR Toolkit lives at kit.liquidrenovations.com/wp-admin. Log in with your WordPress credentials. The LR Toolkit menu contains all management screens.

Dashboard Overview

Widget	What It Shows
KPI Cards	Total Jobs, Scheduled, In Progress, Completed, Active Builders, Today's Jobs
Builder Performance Analytics	Pie chart of job type distribution + bar chart of completed jobs by builder and type
Today's Schedule	Scrollable list of today's jobs with builder, lead, and status badges
Builders Overview	Quick list of active builders with contact names
Activity Log	Last 50 admin and staff actions: job creates, updates, deletes, photo uploads, logins

Job Management — List & Calendar Views

Navigate to **LR Toolkit** → **Jobs**. Toggle between List view (sortable table) and **Calendar view** (monthly grid). In Calendar view, jobs appear as color-coded pills by type. **Drag any pill to a different date to reschedule it** — the change saves automatically and an Undo button appears for 7 seconds. Ctrl+Z / Cmd+Z also undoes the last move.

Creating or Editing a Job

Field	Description	Notes
Title	Full job title including type prefix and product	Follow naming convention from Calendar
Scheduled Date	Date picker for the job date	Required
Status	Scheduled / In Progress / Completed / Cancelled	Can be updated by admin or crew
Builder	Select from builders list	Drives Drive folder structure
Crew Lead	Filtered — only shows staff with position = Crew Lead	Required for crew portals
Driver	Filtered — only shows staff with position = Driver	Required for driver portal
Job Order	1st, 2nd, 3rd, etc. — shown as badge on card	Optional
Region	Select region — drives card footer color and area label	Areas text shown on card footer
Community	Select gated community for gate passwords/license info	See Communities section
Notes	Job notes / special instructions visible on crew cards	Calendar import text lands here
Mixes Count	Number of mixes for this job (for ratio calculation)	Auto-parsed from notes if blank
Mix Name	Product name (e.g. PS FRENCH GREY)	Auto-parsed from notes if blank

Materials To Load	Add materials with quantity, unit, and bags. Each item shows on the driver card.	Per-mix ratios auto-calculated
--------------------------	--	--------------------------------

ADMIN MODULES

All management screens — a complete reference.

Every management screen is accessible from the LR ToolKit sidebar menu. Each module handles a specific area of operations.

Builders

- Add and manage pool builders (company name, contact, email, phone)
- Builder profile pages show YTD job stats
- Builder name drives Google Drive folder naming for photo uploads

Materials

- Full product library with name, category, and formula notes
- Materials are selectable on job edit page and in Material Used crew reports
- Categories help organize products (PS, PF, Additives, Used Materials, etc.)

Staff

- Add staff with name, position, phone, email, and 4-digit PIN
- Positions: Driver, Crew Lead, Supervisor, Manager, Tech Support
- PIN is used for frontend portal login — set or update here
- Director notes field (admin-only visibility)

Regions

- Color-coded geographic regions with descriptive area names
- Example: "Sage" region with areas text "Mt P / Sullivan's / IOP / Awendaw / Wando"
- Areas text (not color name) shows on job card footer and Job Report
- Sort order controls display order in job edit dropdown

Community

- Manage gated communities with gate password/code, license/permit number, and notes
- Community dropdown on job edit page associates a job with a community
- Staff can reference community info from the job card detail view

Day Map

- Interactive Google Map showing all jobs for selected date as pins
- Click any pin to see job title and status
- Accessible from job card "View on Map" button or portal header

Cal Import

- One-click import from Google Calendar (liquidrenovation@gmail.com and info@liquidrenovations.com)
- Imports job title, date, address, notes, and materials text
- Duplicate detection prevents double-importing the same calendar events

Reports

- Admin-facing job report with date picker and search
- Print-ready output for all jobs on selected date

Shortcodes

- Reference page showing all available shortcodes to embed portals on WordPress pages
- [lr_schedule_manager], [lr_driver_portal], [lr_prep_portal], [lr_plaster_crew], [lr_reports_portal], [lr_activity_board]

Google Settings

- Service account JSON for Google Drive and Calendar API authentication
- Root Drive folder ID configuration (currently: 0ACegWFIA2lckUk9PVA)
- Maps API key configuration

INTEGRATIONS & ANALYTICS

Google Drive, Google Calendar, and performance insights.

LR Tool Kit connects directly to Google Workspace for photo storage and job import. No manual file management — photos flow to the right folder automatically.

Google Drive — Photo & Video Storage

Every photo and video uploaded from a job card goes directly to Google Drive — not the WordPress media library. The folder structure is created automatically on first upload:

Level	Folder Name	Example
Root	Configured Drive folder (ID: 0ACegWFIA2lckUk9PVA)	LR Toolkit Root
Level 1	Builder company name	Heritage Pools
Level 2	Job Title Builder Name	(PLASTER) Heritage: Myers... Heritage Pools
File	Photo or video file with timestamp	IMG_2024-03-27_14-32.jpg

Note: If a folder is deleted from Drive, the system creates a new one automatically on the next upload. Folder IDs are cached per job to avoid duplicates.

Google Calendar Import

Navigate to **LR ToolKit** → **Cal Import**. Select a date range and click Import. The system reads from two calendars: liquidrenovation@gmail.com and info@liquidrenovations.com. Jobs are matched by Google Calendar event ID — re-importing the same range will not create duplicates. The job title, date, address, and full notes (including materials text) are all imported.

Builder Performance Analytics

The Analytics section of the Dashboard shows two live charts built from job data:

Chart	What It Shows	Data Source
Job Type Distribution	Donut chart showing all jobs by type (Plaster, Prep/Details, Acid Wash, Reno, Drain & Clean, Start, Other)	Parsed from job title when no type tag is set
Completed by Builder & Type	Stacked bar chart: each builder is a column, stacked by job type, showing completed job counts	Only completed jobs, grouped by builder and type

Job types are auto-detected from the title using keywords: (PLASTER), (PREP), (ACID), (DRAIN), (RENO), (START). No manual tagging required for calendar-imported jobs.

Activity Board

The Activity Board (shortcode: `[lr_activity_board]`) tracks every meaningful action across the system. It logs: job creates, updates, deletes, photo uploads, job status changes, and staff PIN logins — with the user's name, action type, and timestamp. The Dashboard also shows the last 50 actions inline.

Action	Color	Triggered By
Created	Green	Admin creates a new job
Updated	Blue	Admin edits a job, crew updates status
Deleted	Red	Admin deletes a job, builder, or staff
Uploaded	Purple	Any staff uploads a photo or video
Login	Amber	Staff signs in via PIN

PLATFORM & GETTING STARTED

Technical overview and quick-start for new users.

LR Tool Kit runs as a WordPress plugin (version 4.5.17) on kit.liquidrenovations.com. It uses a custom REST API, direct Google API integration, and PHP sessions for staff authentication.

Technical Architecture

Component	Technology	Purpose
Backend	WordPress + PHP 8.1	Plugin host, admin UI, REST API endpoints
Database	MySQL (12 custom tables)	Jobs, staff, materials, builders, regions, communities, files, activity log
Frontend	Vanilla JS + jQuery	Portal UI, job card rendering, drag-drop, camera
REST API	/wp-json/lrtk/v1/	Jobs, builders, materials, staff, files, analytics
Authentication	WP cookies (admins) + PHP sessions (staff PIN)	Role-based access to frontend portals
Google Drive	Drive API v3 + Service Account JWT	Auto-organized photo/video storage
Google Calendar	Calendar API v3 + Service Account	Job import from liquidrenovation@gmail.com
Google Maps	Maps JavaScript API	Day Map modal, address geocoding, map pins
Page Builder	Elementor (some pages)	Portal page layouts on frontend

Quick Start — New Staff Member

Step	Action	Who Does It
1	Admin creates staff record: LR ToolKit → Staff → Add Staff Member	Admin
2	Enter name, select position (Driver / Crew Lead / etc.), and set a 4-digit PIN	Admin
3	Share the portal URL with the staff member (e.g. kit.liquidrenovations.com/driver/)	Admin
4	Staff member opens the URL, enters their name and PIN, and signs in	Staff
5	Today's jobs load automatically — staff can start checking materials, uploading photos, and recording status	Staff

Portal URLs

Portal	URL	WordPress Shortcode
Schedule Manager	kit.liquidrenovations.com/calendar/	[lr_schedule_manager]
Driver Portal	kit.liquidrenovations.com/driver/	[lr_driver_portal]

Prep Detail Portal	kit.liquidrenovations.com/prep-detail/	[lr_prep_portal]
Plaster Crew Portal	kit.liquidrenovations.com/crew-lead/	[lr_plaster_crew]
Job Report Portal	kit.liquidrenovations.com/job-report/	[lr_reports_portal]
Activity Board	Add to any admin-only WordPress page	[lr_activity_board]

Need help or have a feature request?

Contact your admin or reach out to your developer. Plugin version: LR Tool Kit v4.5.17 — kit.liquidrenovations.com