qMetrix Insight

Website - User Guide

qMetrix Insight helps hotel and facility teams inspect rooms, manage cleaning, track issues, and run reports from a web browser. This guide covers every screen in the console — who can see it, where it lives, and what you do there.

Note on terminology: Insight adapts its labels by industry. This guide uses hotel terminology throughout (Rooms, Locations). Other verticals — Cruise, Nursing Home, Forklift, and more — use different terms for the same screens.

Note on languages: The hotel console supports 22 UI languages. Other verticals are English-only. Preventive Maintenance and Walk Order screens are English-only in every language.

Language setting: The language selected on a user's profile is applied at the next login. There is no in-app language switcher.

Note on permissions: What you see in the left-hand menu depends on your permission checkboxes, not a single role. See the Users section for the full permission matrix.

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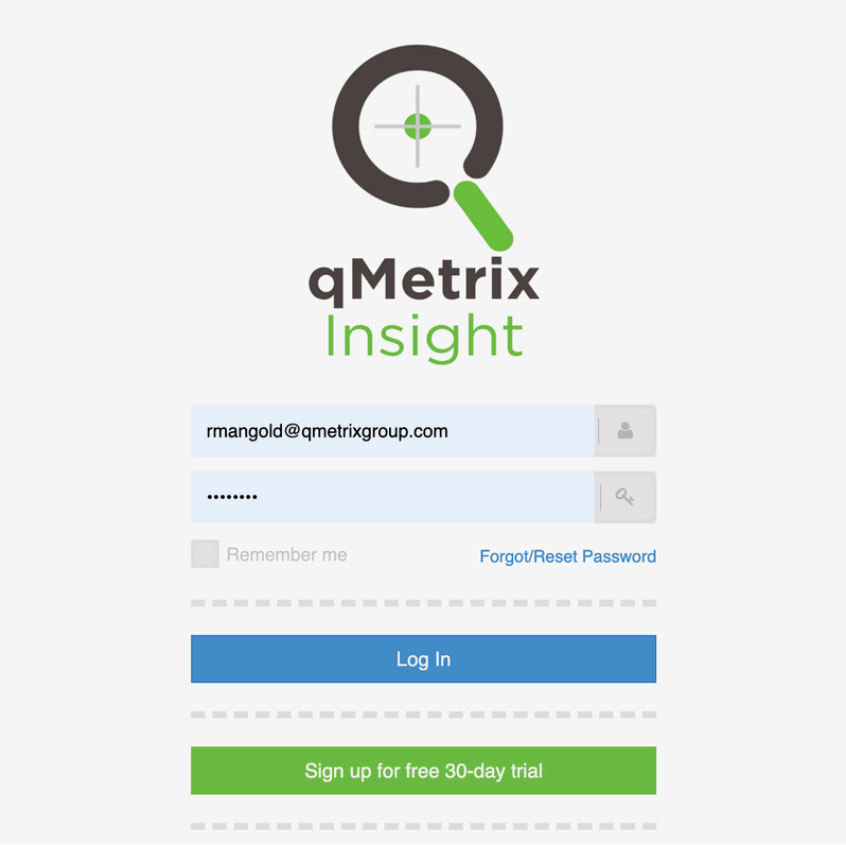
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1. Getting Started

1.1 Login

Sign in with your email and password. The login screen also links to password reset and free-trial registration.

Login screen



On first-ever login, you will be directed to the Terms & Conditions screen before reaching the dashboard.

1.2 Free Trial Registration

Self-service sign-up that creates your company, first location, and administrator account in one step, then sends an activation email.

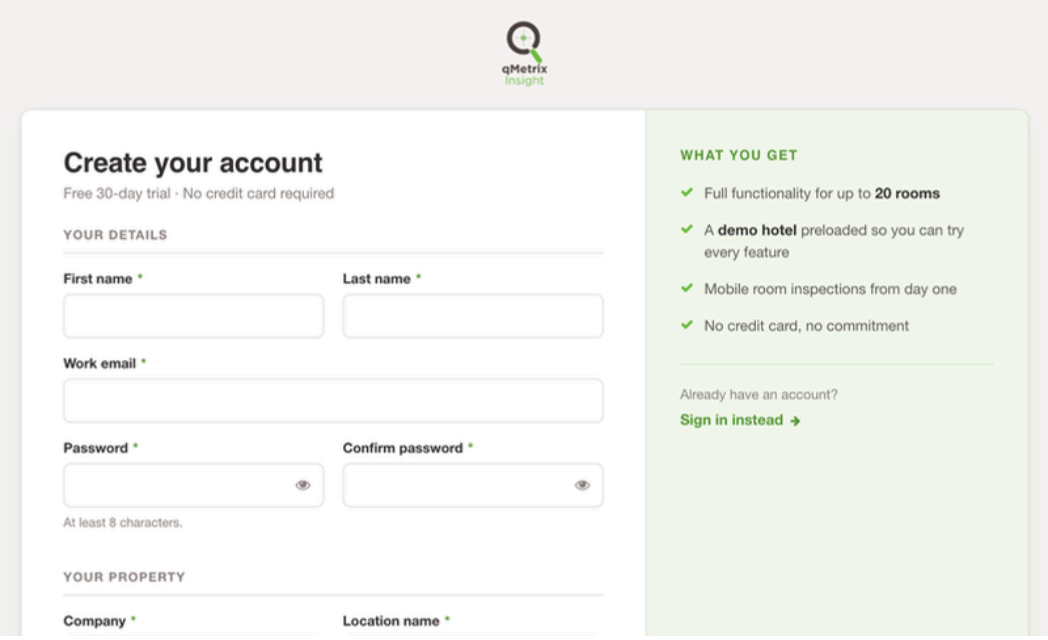
Fields: First name, last name, email, password, company name, location name, timezone, and how you heard about us. Address details are optional.

Every new account receives a **20-room, 30-day trial** beginning when the user activates the account from the email link, not when the registration form is submitted.

Trial accounts are preloaded with a working demo hotel: condition types, priorities, categories, items, room types, room status types, 20 rooms, three demo housekeepers, and a month of cleaning assignments.

Trial setup: rename or hide the demo data before using the account. There is no start-empty option.

Registration form



When the trial expires, login is refused with a message directing the user to contact support. Updating the subscription will allow access to the same location you used during the trail.

1.3 Forgot / Reset Password

Standard email-link reset flow. Enter your email, receive a link, and set a new password.

1.4 Terms & Conditions

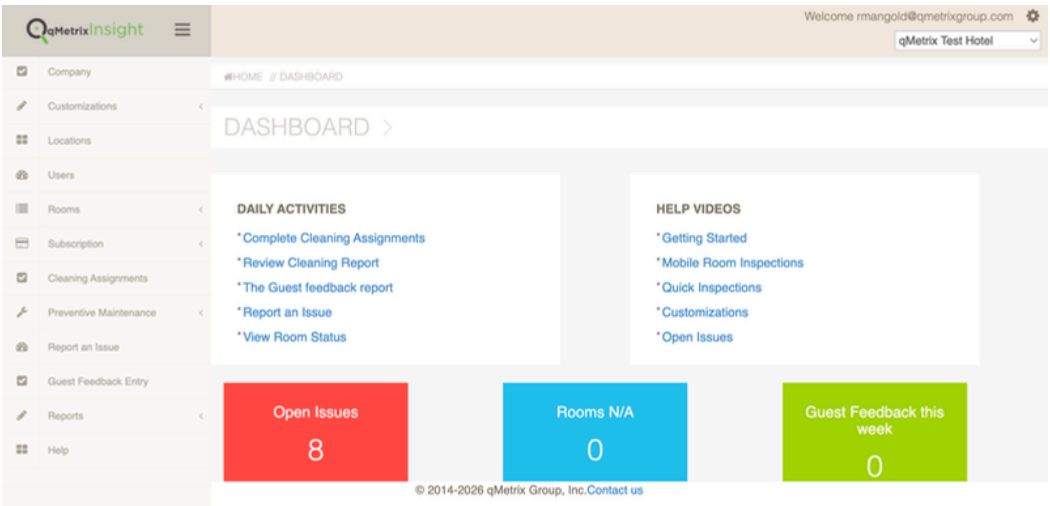
Shown automatically on first login. Must be accepted before the console or mobile app can be used.

1.5 Dashboard (Home)

The landing screen after login.

- **Daily activities** — shortcuts to Complete Cleaning Assignments, Review Cleaning Report, Guest Feedback Report, Report an Issue, and View Room Status.
- **At-a-glance counters** — Open Issues, Rooms Clean & Ready, Guest Feedback This Week.
- **Help videos** — Getting Started, Mobile Room Inspections, Quick Inspections, Customizations.
- **Location switcher** — in the top header, for users with all-location access.

Dashboard / Home screen



2. Company

Requires: Manage Company (or admin)

Lists the customer's own company record. Companies are created during registration, not added here. Normal customer administrators see their own company.

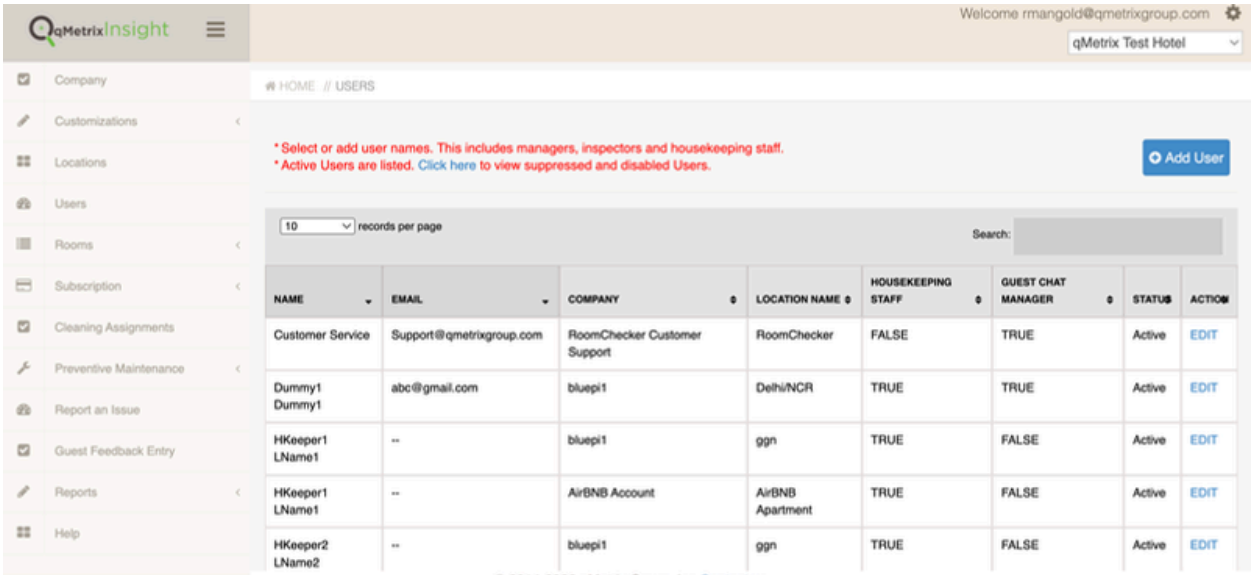
- **Edit** — change company name and status.
- **Master Data download** — exports a multi-sheet Excel workbook containing Locations, Items, Condition Types, Users, Rooms, Room Status Types, and Priority Types. Useful as a configuration backup or audit.

3. Users

Requires: Manage User (or admin)

Manage everyone who uses Insight — managers, inspectors, and housekeeping staff. Users are never deleted; they are disabled via Status. The user list includes a Guest Chat Manager column.

User list



3.1 Add / Edit User

Basic details: First name, last name, email, phone (all required), mobile number, password, PMS ID, preferred language, and Default Location.

Staff flags:

- *Housekeeping Staff* — makes the user selectable in Cleaning Assignments.
- *Grant Full Access on Mobile App*
- *User will not login* — for staff who are assigned work but never sign in.
- *Guest Chat Manager* — remains active as a user flag and controls who is notified of guest chat messages.

User Access — permission checkboxes:

| Permission - What it unlocks |
| Manage User - Users menu |
| Manage Location - Locations, Rooms, PM Schedules, PM Task Queue, and subscription screens |
| Manage Reports - All Reports |
| Manage Company - Company menu |
| Manage Customizations - All Customizations |
| Manage Staff - Cleaning Assignments |
| Manage Payment - Separate account screens only; subscription screens require Manage Location |
| All Location Access - Adds the location switcher; move between properties |

Any logged-in user with no permissions can still access the Dashboard, Report an Issue, Guest Feedback Entry, My PM Tasks, and their own profile.

Notifications — Immediate, Daily, or Monthly frequency, plus All Location Notification and a multi-select of Notification Condition Types.

3.2 My Profile

Self-service screen for updating your name, email, mobile and phone. Location and permissions are visible but read-only — only an administrator can change those.

4. Locations

Requires: Manage Location (or admin)

A location is one physical property or site. Locations hold their own rooms, customizations, room quota, industry vertical, and default language.

4.1 Add / Edit Location

Required: Location name, phone, address, city, state, country, preferred language, timezone.

Optional fields: Fax, ZIP code, PMS ID, and PMS URL.

Options:

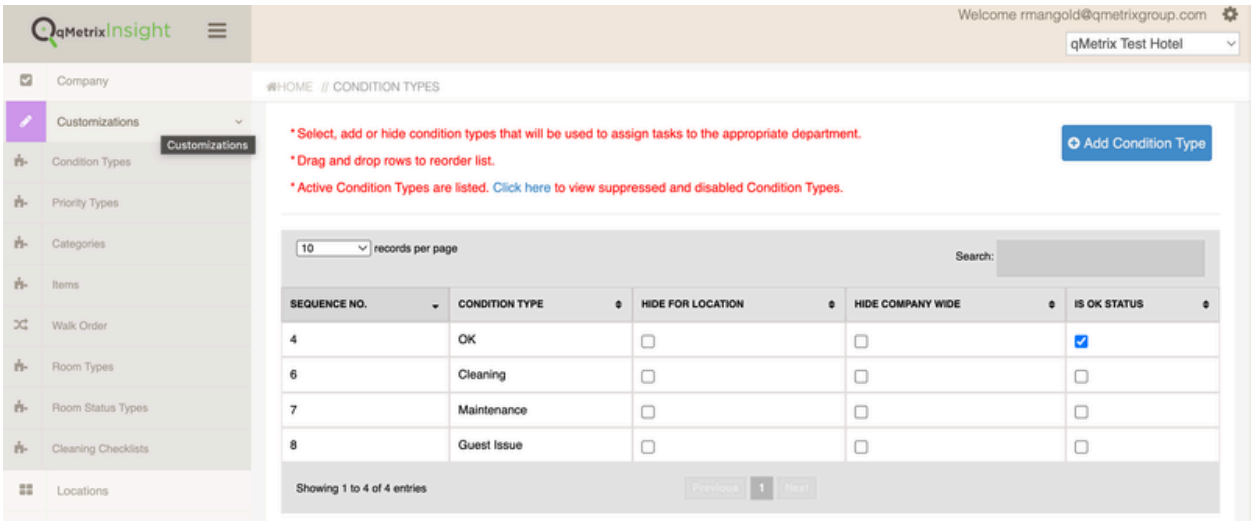
- *SMS Notifications* — enables text-message alerts. Users must have a mobile number on file.
- *Notify Hotel Software* — pushes status changes to the property management system.
- *Daily Reset Status* — room statuses reset automatically each day.
- *Inspection Required*

QR codes for Guest Requests and Guest Feedback are also generated from this screen.

5. Customizations

Requires: Manage Customizations

Where the inspection vocabulary is configured. Most new-customer setup work happens here, and it should be completed before rooms are added.



How these screens work:

- Editable grids — change values inline, then press one **Save** button for the whole table.
- Drag rows to change display order.
- Nothing is deleted — use **Hide for Location** or **Hide Company-Wide** instead.
- Saving triggers mobile devices to re-sync their master data.

5.1 Condition Types

The outcomes an inspector can choose for an item — for example Clean, Dirty, Damaged, Missing.

Fields: Name, Sequence, **Is OK Status** (this condition counts as "no problem"), Hide for Location, Hide Company-Wide.

5.2 Priority Types

How serious an issue is — for example Low, Medium, High.

Fields: Name, Sequence, **Make Default**, **Make Critical**, Hide for Location, Hide Company-Wide.

5.3 Categories

Groups for inspection items — for example Bathroom, Bedroom, Electronics. Every item belongs to a category.

5.4 Items

The individual things being inspected — bed linens, mini bar, TV remote. Items are the heart of an inspection.

Fields: Item name, Category, Room Types (which room types include this item), and Use for Inspection.

5.5 Room Types

A template for a class of room — King, Suite, Double. The room type determines which items get inspected.

Actions: Add, Add Room Type with Item, Edit, and copy the item list from another room type (the fastest way to build a similar room type).

5.6 Room Status Types

The states a room can be in — Vacant Clean, Occupied Dirty, Out of Order, and so on.

Fields: Name, Sequence, PMS Id, and behaviour flags: Ready/Default, Dirty, Daily Reset, Vacant, Clean.

5.7 Cleaning Checklists

A reusable, step-by-step cleaning procedure for housekeeping staff. Where Items and Room Types drive **inspection**, cleaning checklists drive **cleaning execution**.

Structure: a checklist contains items grouped into **zones** (Bathroom, Bed Area, Entry). Zones are a shared company-wide list reused across all checklists — manage them with the **Manage Zones** button.

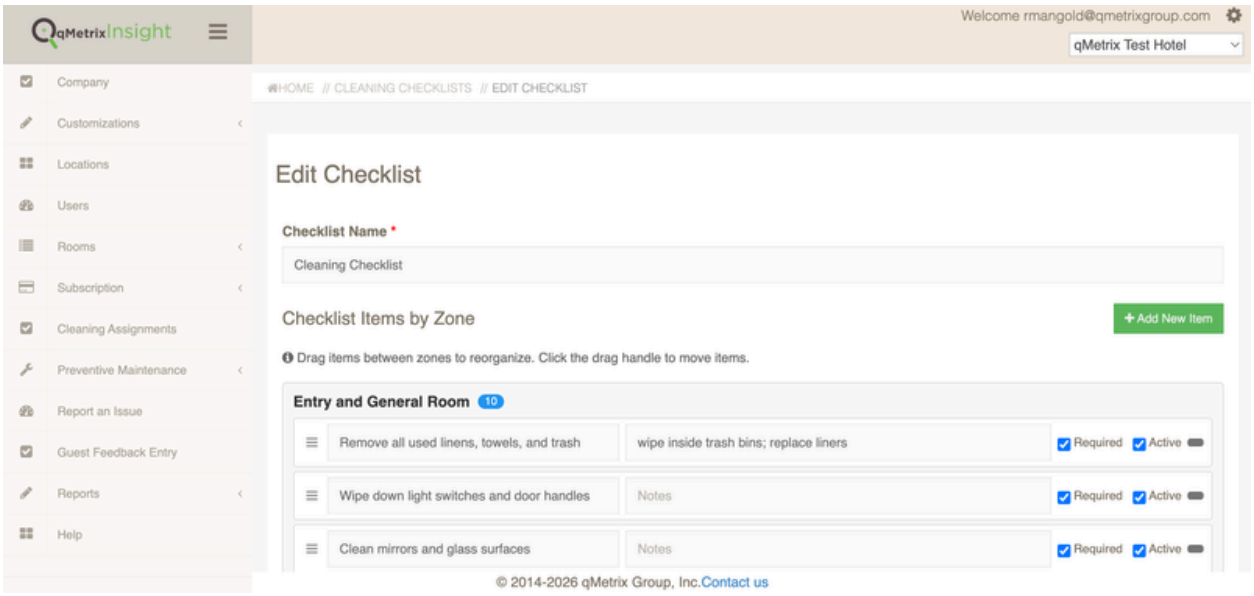
Checklist items: each item can include notes and Required and Active fields.

Building a checklist: zones appear as sections and items as draggable cards.

Drag items between zones and reorder within a zone. If an item has no zone, Insight prompts you to place it in one; use **Manage Zones** to maintain the shared company-wide zone list.

Actions: Add Cleaning Checklist with Items, Edit, **Clone**, Delete. Clone copies the checklist so you can adapt it without rebuilding the original.

Cleaning checklist builder with zones



6. Rooms

Requires: Manage Location

6.1 Room List

Drag rows to reorder rooms — this order is what inspectors see. Buttons: **Download QR Codes** (all rooms at once) and **Add Room**.

Columns: Sequence No., Room, Room Type, Tags, Guest Chat, Status, PMS ID, Action, QR Code Link.

6.2 Add Room

Room Type is required. Choose either a single room or a room range to create many at once.

Optional: Tags, PMS ID, cleaning checklist.

Room creation is limited by the purchased room capacity for the location; the screen prompts you to subscribe to more rooms when the limit is reached.

6.3 Mass Update

Bulk changes across many rooms. Select rooms individually or check all, then apply: Room Status, Room Tags, Inspection Status, Cleaning Assignment, Reassign Cleaning Assignment, or Cleaning Checklist.

6.4 QR Codes

Insight generates printable QR codes for three purposes:

| QR Code | Where Generated | What It Does |
Room	Room List / Room Edit	Opens that room's record — post it inside the room
Guest Request	Location Edit	Guest scans and submits a request — no app needed
Guest Feedback	Location Edit	Guest scans and leaves feedback and a score

7. Cleaning Assignments

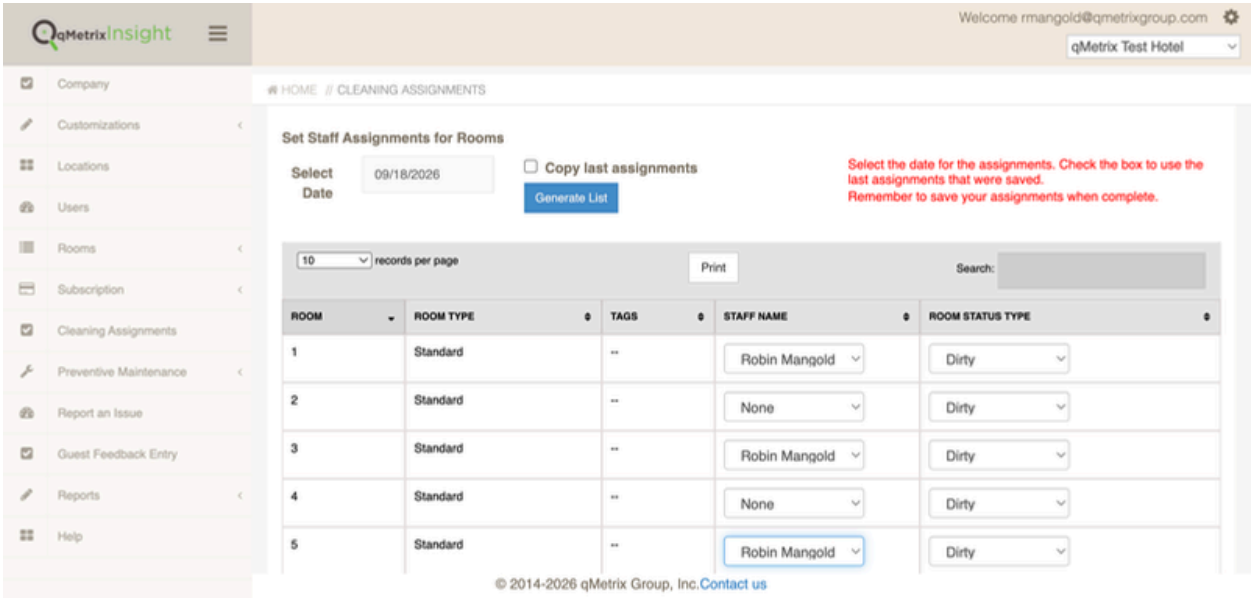
Requires: Manage Staff

Assign rooms to housekeepers for a given day.

1. Select the assignment date (defaults to today in the location's timezone).
2. Optionally tick **Copy last assignments** to reuse the previous saved set.
3. Click **Generate List**.
4. Set the staff member and room status against each room.
5. **Save.**

A **Print** button produces a paper assignment sheet. You can also copy assignments to another date or date range — useful for repeating a stable roster across a week.

Cleaning Assignments screen



8. Preventive Maintenance

Available on all plans.

Preventive Maintenance screens are English-only in every UI language.

Scheduled, recurring maintenance work — as opposed to the reactive issues raised by inspections.

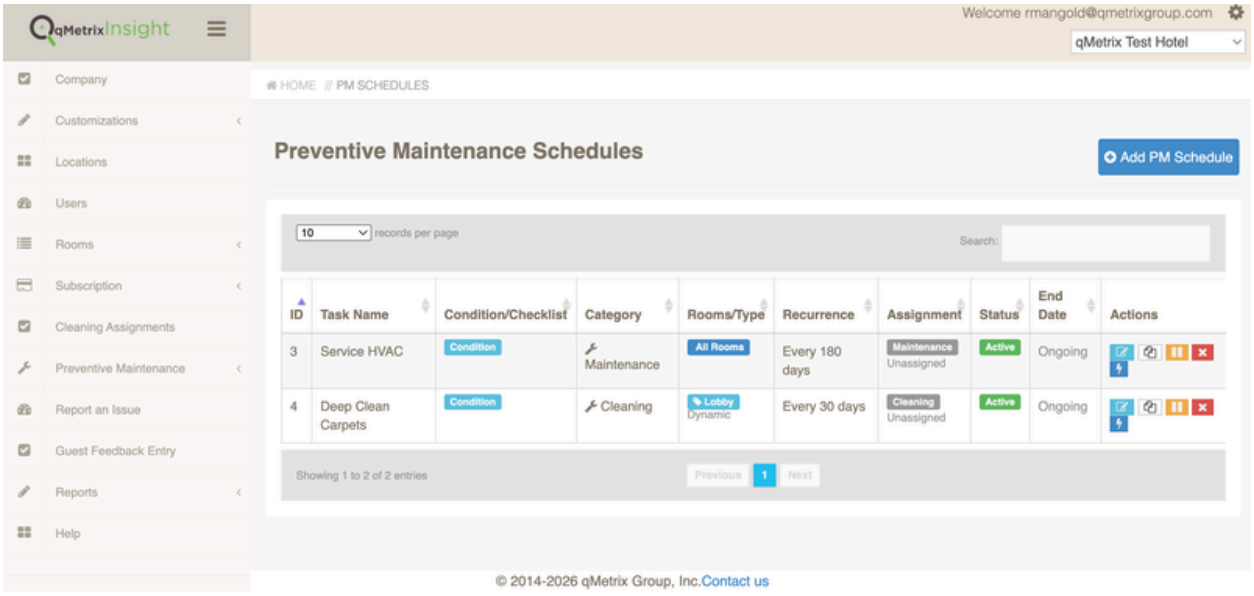
Concept: you build a **schedule** (a recurring template). At 12:05 AM each night, Insight generates individual **tasks** from it — one task per room per due date. Staff complete the tasks.

8.1 PM Schedules

The list of recurring maintenance templates. Schedule statuses are **Active**, **Paused**, and **Inactive**.

Row actions: Edit, **Clone**, **Pause**, **Resume**, **Inactivate**, and **Trigger Now** (generates tasks immediately for a chosen date, instead of waiting for the overnight run).

PM Schedule list



8.2 Add / Edit PM Schedule

1. Task Category — Condition based (defined by a Condition Type) or Checklist based (defined by a Cleaning Checklist).

2. Room Selection — All Rooms, all rooms of a chosen Room Type, or specific rooms.

3. Task Name and **Task Description**

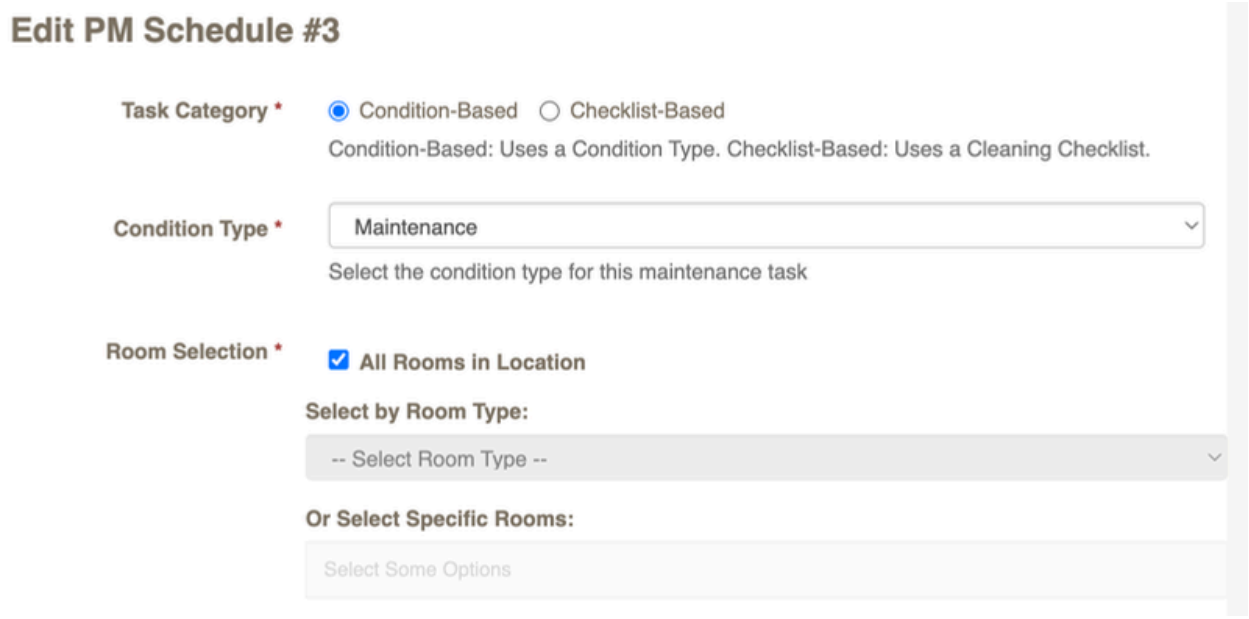
4. Recurrence — Daily, Weekly (choose day), Monthly (choose day), or Every N Days.

5. Start Date and optional **End Date**

6. Assignment — Assign to Staff (one named person) or Assign to Role (optionally with Assign Randomly to rotate through active staff in turn).

Tip: if Role assignment is used without Assign Randomly, generated tasks are left unassigned — they appear in the PM Task Queue but not in anyone's My PM Tasks until someone picks them up.

Add PM Schedule form



8.3 PM Task Queue

The supervisor's view of **all** PM tasks at the location, including unassigned ones.

Filters: Room, Status, Assigned User, Schedule, Start Date, and End Date. The queue also shows task, room, schedule, category, due date, status, and assigned-user columns.

8.4 My PM Tasks

The worker's personal list — only tasks assigned to them, with counters: **Scheduled**, **In Progress**, and **Completed**. Rows are color-coded (yellow = in progress, green = done).

8.5 PM Task Details

Shows the room, task name, category, status, condition type or checklist, due date, assigned person, and a Schedule Information panel.

Task lifecycle: Scheduled → **In Progress** → **Done**. Use Start Task, Mark as Done, Back to Scheduled, and Reopen Task for reversible transitions.

Completion evidence: a photo upload and free-text notes. Named assignees receive a push notification when a task is assigned.

9. Report an Issue

Available to: any logged-in user

A quick form for logging a problem found outside a formal inspection.

Fields: Room, Item, Condition, Priority, Comments. Reset clears the form.

Issues raised here appear in the Cleaning Report alongside inspection-generated issues.

10. Guest Feedback & Requests

10.1 Guest Feedback Entry

Captures a guest's comments and satisfaction score. Staff can fill it in on a guest's behalf, or the guest can scan the location's feedback QR code.

Fields: Room, Stay Date, Name, Email, Phone, Staff, Priority, Comment Type, Comments, and a **Score from 1 to 10** (1 = Poor, 10 = Excellent).

10.2 Guest Requests

Tracks guest asks — extra towels, maintenance call-outs. Guests submit via the Guest Request QR code, or staff add them manually.

Actions: Add Guest Request, edit, and **Mark Closed**.

10.3 Guest Chat

Guest requests can carry a live two-way chat thread between the guest and staff. The guest uses a link that needs no app or login; staff reply from the console.

11. Reports

Requires: Manage Reports

Four groups: Inspections, Guests, Time Tracking, and Trends.

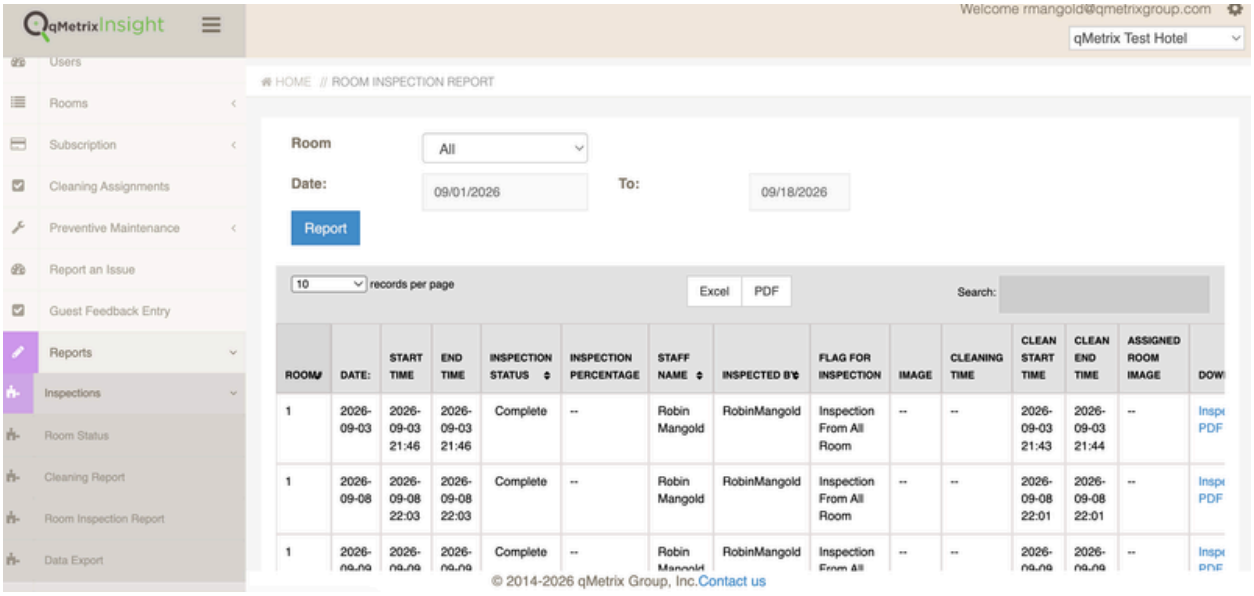
Conventions: date pickers default to today; trend and time-tracking reports are bar charts with a Print button; table reports support search, sorting, and paging; some reports export to Excel or PDF. Users with All Location Access can filter reports by Location.

11.1 Inspections

- **Room Status** — what condition is every room in right now? Per-row downloads: PDF with images, PDF without images, Excel. Today only.
- **Cleaning Report** — which defects were found, by whom, and are they still open? Filter by date range, Location when available, condition type, and issue status. Includes inline **Mark Resolved** and an image viewer for inspection photos. Exports to Excel.
- **Room Inspection Report** — start/end times, who cleaned, and who inspected. Its on-screen Percentage column is always empty and is not a metric. Exports to Excel and PDF.
- **Data Export** — raw inspection and room-status data as an Excel download for external analysis.

Item scoring has been withdrawn from Insight, so score-based metrics are not part of reports or inspection PDFs. Guest satisfaction scores in Guest Feedback are separate and remain available.

Inspection Report



11.2 Guests

- **Requests** — see Section 10.2.
- **Feedback and Scoring** — what did guests say during a period? Click View to open a feedback record.

11.3 Time Tracking

All three are bar charts measured in minutes.

- **Actual Cleaning Time/Day** — how long did each room take on a given day?
- **Total Cleaning Time/Day** — how many total minutes did each staff member spend cleaning that day?
- **Average Time to Clean** — over a date range, average time by staff and room type.

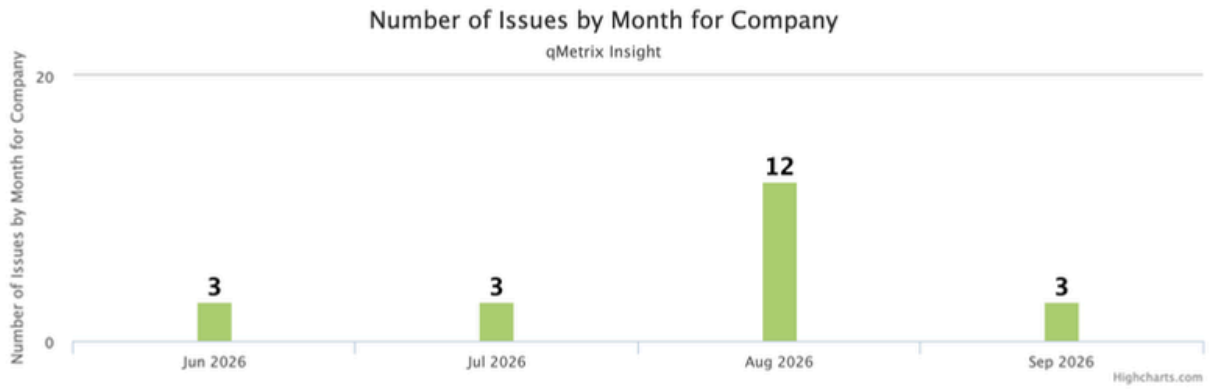
11.4 Trends

- **Issues by Month** — is our defect count rising or falling? Click a bar to drill into that month.
- **Issues by Item** — which items fail most often? Drills down twice, with

Excel export at both levels.

- **Issues by Staff** — which housekeepers accumulate the most inspection failures?
- **Top Issues by Month** — biggest recurring problems for a period.

Issues by Item trend chart with drill-down



12. Subscription & Billing

Requires: Manage Location for all subscription screens and changes.

Subscription is a top-level menu with **Subscribe Rooms** and **My Subscriptions**.

12.1 Plans

| Plan | Description |
| **Core** | Up to 10 rooms, with 100 included AI credits per location each month. |
| **Pro** | Minimum 20 rooms with no upper limit, with 300 included AI credits per location each month. |

Annual billing carries a 20% discount. Dsee Subscribe Rooms for current pricing.

AI credits are per location. They are included monthly by plan and can later be purchased through a monthly add-on or a one-off credit pack. Credits roll over and do not expire. If the balance is insufficient, the AI feature stops

instead of creating an overage.

12.2 Subscribe Rooms

Buying rooms means buying the capacity to configure that many rooms at a location. On Subscribe Rooms, the room field means additional rooms, not a new total.

1. Choose a plan.
2. Choose **Monthly** or **Annual** billing (annual is 20% off the monthly cost).
3. Enter the number of additional rooms — pricing updates live.
4. Optionally add AI analysis credits. - Not always available
5. Continue to secure card checkout hosted by the payment provider.

Capacity should appear shortly after payment confirmation. Contact the qMetrix team for volume pricing.

12.3 My Subscriptions

Each location has at most one live subscription. My Subscriptions lists current and past records, including **Active**, **Trialing**, **Past due**, **Cancelled**, and **Scheduled** statuses.

Available actions: Change, Cancel, Resume, and Cancel scheduled.

Cancellation continues through the paid period with no refund and can be resumed before that period ends.

Change / Upgrade: effective immediately; supports adding rooms, Monthly to Annual, with pro-rata charging.

Schedule Next: takes effect when the current period ends; supports room increases or decreases, billing-period changes, and either plan without an immediate charge.

On Change, the room field means the total subscription room count. This differs from Subscribe Rooms, where it means additional rooms.

My Subscriptions is the billing-history view, including cancelled subscriptions. Invoices and receipts are sent by the payment provider by email.

13. Notifications

Insight sends push notifications to the mobile app, plus email and optional SMS.

Push notification events:

| Event | Who is notified |
Issue created	Staff at that location whose notification condition types match the issue
Cleaning assigned	The assigned housekeeper
PM task assigned	The named assignee
Ready for inspection	Managers with Manage Location, when a cleaner marks cleaning finished

Email also covers password resets, account verification, trial confirmation, guest request acknowledgements, and guest chat messages.

The person who performed the action is never notified of their own change.

Per-user controls: Immediate, Daily, or Monthly frequency; All Location Notification; and the list of Notification Condition Types the user cares about.

SMS is enabled per location and requires users to have a mobile number on file.

14. Integrations & Advanced

14.1 PMS Integration

Insight connects to your Property Management System so room status and occupancy stay in sync without staff re-keying them.

Setup is field-level:

- **PMS ID** and **PMS URL** on the Location record
- **Notify Hotel Software** checkbox on the Location record
- **PMS Id** on each Room Status Type, mapping Insight statuses to your PMS's own codes
- **PMS ID** on Rooms and Users

14.2 Optional AI Features

See Section 16 for current details about AI Photo Analysis and Walk Order. Availability is controlled by server-side switches and may vary by environment.

15. Help & Support

Reached from **Help** in the left-hand menu or contact us at the number and email below:

- **Phone:** (319) 393-3230
- **Email:** support@qmetrixgroup.com
- **Online chat** on the website
- **Support hours:** 8am–5pm CST, Monday–Friday
- **Mobile app download links** for iOS and Android

Appendix A — Permission to Screen Matrix

| Screen / Menu | Permission Needed |
Dashboard, Report an Issue, Guest Feedback Entry, My PM Tasks, My Profile	Any logged-in user
Company	Manage Company
Locations	Manage Location
Users	Manage User
Customizations (all), Walk Order	Manage Customizations
Rooms (list, add, mass update), Subscribe Rooms	Manage Location
Cleaning Assignments	Manage Staff
PM Schedules, PM Task Queue	Manage Location
Reports (all)	Manage Reports
Subscription menu, Subscribe Rooms, My Subscriptions, and subscription changes	Manage Location
Separate Billing / Account screens	Manage Payment

Appendix B — Suggested Setup Order for New Customers

1. Register and accept terms
2. Review and adapt the preloaded demo data if this is a trial account — rename or hide anything you do not need
3. Add or confirm the **Location** — set timezone and language
4. Configure **Customizations** — condition types, priority types, categories, items, room types, room status types
5. Build **Cleaning Checklists** and zones (optional)
6. Add **Users** and set their permissions and notifications
7. Add **Rooms** (subscribe to more room capacity if needed)
8. Print and post **QR codes**
9. Create **Cleaning Assignments** and **PM Schedules**
10. Record walks in the mobile app and apply **Walk Order** only where it is enabled
11. Review **Reports**

16. Optional AI Features

16.1 AI Photo Analysis

An inspector photographs a room in the mobile app. Insight analyzes the photo against the location's item list and proposes the item, problem, severity, and a short description. The inspector reviews, edits, and confirms the proposal; nothing is filed without human confirmation. The inspector is notified when analysis completes.

AI Photo Analysis is paid for with the location's AI credits, not a Pro + AI plan. The feature stops when credits are insufficient rather than creating an overage.

Availability is controlled by a server-side switch. Confirm with the product team before documenting AI Photo Analysis as generally available.

16.2 Walk Order

Walks are recorded in the mobile app only; the web console provides review and apply screens. A short room video is analyzed to determine the physical order of checklist items so inspections follow the walking path.

Walk Order overrides item and category sequence without rewriting the configured sequence. Clearing the order returns the room to the configured order. A room-specific walk overrides a room-type walk, which overrides the default configured order.

List statuses: Created, Queued, Processing, Awaiting Review, Applied, and Failed. Filters include status, room, room type, and date; available actions include opening a walk, reviewing it, applying it, rerunning AI, and clearing an applied order.

Review: the proposed order is draggable and includes confidence indicators and an Unplaced panel. The row legend is plain = seen, amber = inferred, and blue = added by the reviewer. Choose an Apply To scope, then use Apply Walk Order or Re-run AI.

Reopening an applied walk shows the order currently in force. Applied Orders show the active result; Source identifies inherited room or room-type

configuration; Not in walk lists items not included; Clear Order removes the applied override.

Rerunning AI costs credits and cannot be undone. Phones must resync before a newly applied order appears in the mobile inspection flow.

Walk Order is controlled by a server switch, may be unavailable in production, and is English-only.