

Bridge Guide

Administrative guide for managing tenants, users, projects, and system settings within the Bridge platform.

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Dashboard

Purpose

The Dashboard is the “home page” of the Bridge Admin Portal. It’s designed to answer the first two questions any user has in a multi-tenant system:

1. **What tenant (customer) am I working in right now?**
2. **What’s happening across this tenant (and/or the platform) that needs attention?**

When you select a tenant—e.g., **AUSTIN DURHAM (PERSONAL)**—Bridge highlights that context at the top of the screen and scopes the experience accordingly. In tenant mode the navigation focuses on tenant-facing modules (like **Workers, Projects, People**) so you can act faster without jumping back to platform-wide views.

Tenant Context Banner (Top Bar)

At the very top of the page you’ll see a tenant banner indicating the current tenant selection, for example:

- **AUSTIN DURHAM (PERSONAL)**

Why it matters

- **All data you see is “tenant-aware.”** For example, document counts and weekly activity can change when you switch tenants.
- **Permissions still apply.** If you don’t see a tenant or feature you expect, it may be role-based access control.

Practical tip

If something looks “off,” confirm the tenant banner before you assume the data is wrong. In multi-tenant systems, the most common mistake is acting in the wrong tenant.

Sidebar Navigation (Tenant Mode)

In tenant mode you'll typically see the navigation streamlined to tenant modules, such as:

- Dashboard
- Workers
- Projects
- People
- Shortcuts
- Tools
- Inventory
- Settings

Quick Links always remain available:

- [Docs](#)
 - [Support](#)
-

Summary Cards (Overview Metrics)

The dashboard's first row provides "at-a-glance" numbers. Each card includes a **View more** link that drills into the underlying dataset.

Cards you'll see

- **Total Tenants**
 - Shows the tenant count and how many are active (with a progress bar/percentage).
- **Total Users**
 - Shows total users and a role breakdown (e.g., "2 platform administrators") so you know who has elevated access.
- **Total Projects**
 - Shows total projects and active projects (with an active percentage bar).
- **Total Documents**
 - Shows total documents and how many were added *this week* (helpful for spotting upload spikes).

- **Organizations**
 - Shows total orgs and active orgs.
- **Time Tracking**
 - Shows total time entries (or hours) logged *this week* and is the fastest way to detect inactivity.

How to interpret

- Use the **active percentage** (Tenants/Projects) as a “health” indicator.
 - Use **“added this week”** (Documents/Time Tracking) as an “activity pulse.”
 - Click **View more** whenever you need actual names, IDs, filters, exports, or edits.
-

Top Tenant Metrics (Engagement Rankings)

These tables tell you *where* activity is concentrated. Each includes a **View all** link to open a larger list.

Top Tenants by Projects

Shows the tenants ranked by project activity counts. Use it to:

- Identify high-usage customers
- Spot tenants with unexpected low project counts
- Prioritize outreach, support, or resource allocation

Top Tenants by Users

Shows tenants ranked by user counts. Use it to:

- Understand workforce distribution
 - Spot tenants that may need extra training or governance
 - Identify “big tenants” that might warrant quarterly reviews
-

Common “Read the Dashboard” Routine (5 minutes)

If you only have a few minutes, use this repeatable checklist:

1. Confirm tenant banner (e.g., **AUSTIN DURHAM (PERSONAL)**).
 2. Check **Total Projects** → verify “active” count matches expectations.
 3. Check **Total Documents** → if “added this week” is unusually high/low, click **View more**.
 4. Check **Time Tracking** → if entries are 0, decide whether it’s a training issue, a seasonal lull, or a permission problem.
 5. Look at **Top Tenants** tables and click **View all** to spot outliers.
-

Troubleshooting & Tips

- **“I don’t see a tenant.”** Make sure you’re assigned to that tenant; contact an admin if needed.
 - **Metrics don’t match a report.** Click **View more** to confirm filters (date range, status filters like “active,” etc.).
 - **Support is slow if you have no screenshots.** Grab a screenshot of the dashboard (especially the tenant banner) before opening a support ticket.
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Last Updated: June 10, 2026

(Managed by Bridge Platform Administration Team)

Permissions

Bridge Admin Portal – Bridge Services LLC

Overview

Within the Bridge Admin Portal, permissions determine what each user can see and do. There are three scopes for permissions: **Application**, **Project**, and **Organization**. Each scope has its own set of roles that control access at different levels of the platform.

- **Application roles** govern global access across the entire Bridge platform (e.g., platform administrators who can manage tenants and system settings).
- **Project roles** control what a user can do within a specific project (e.g., project members vs. project leaders).
- **Organization roles** define permissions within an organization under a tenant (e.g., laborers, supervisors).

Below you'll find instructions on how to create and manage roles in each scope, along with a dedicated section on creating a new role.

Application Roles

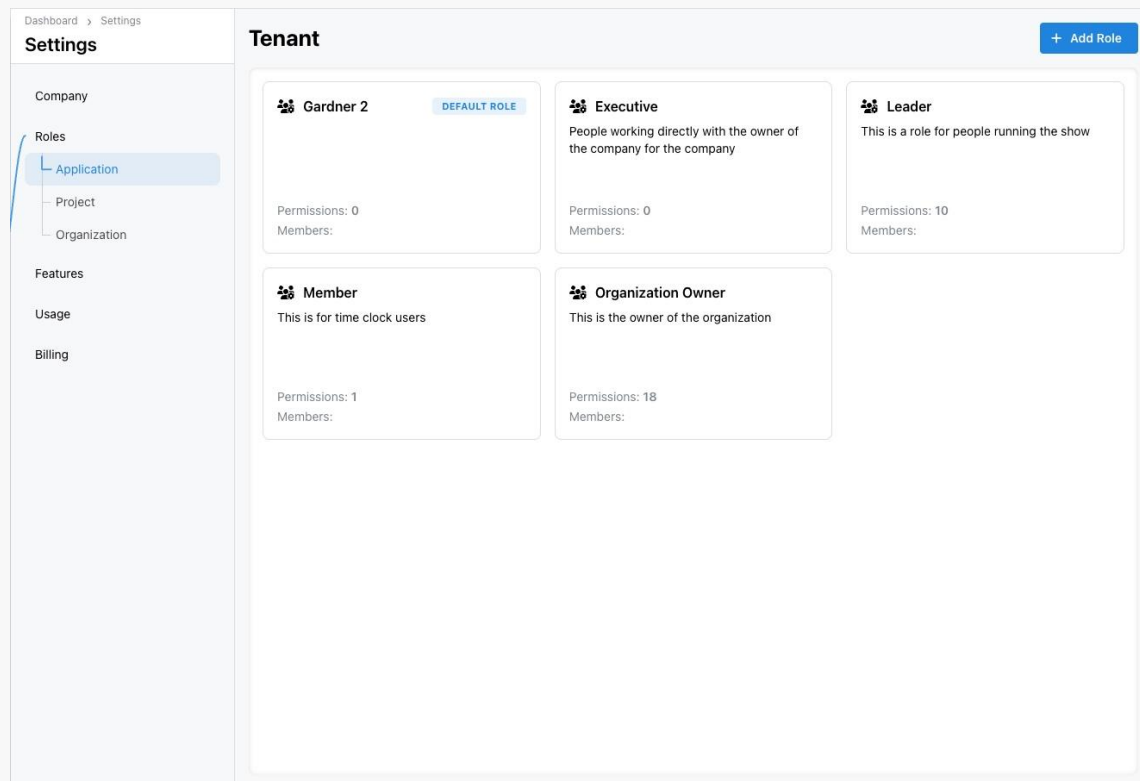
Application roles (sometimes called *Tenant roles*) determine what users can do across the entire Bridge application. Typical roles include "Leader" and "Member," but you can create custom roles with tailored permissions.

Viewing Application Roles

Navigate to **Settings** → **Roles** → **Application** to see existing roles. The summary cards show the role name, a description, and the number of permissions and members. Use this view to review or edit roles.



Example: In the screenshot below, the *Gardner 2* (default) and *Leader* roles are visible under Application roles. The **Add Role** button at the top right is used to create a new application-wide role.



Creating an Application Role

1. From the Application roles screen, click **Add Role**.
2. In the *Create role* modal, choose **Blank role** (start from scratch) or **Start from bundle** (copy an existing role's permissions).
3. Enter a **Role name** (e.g., *Supervisor*) and an optional **Description**.
4. If you want this to be the default role for new application users, check **Make this the default role for new members**.
5. Click **Create Role**.
6. After creating the role, you'll be taken to a permissions editor where you can enable or disable specific capabilities (e.g., managing tenants, editing settings). Save your changes when finished.
7. To assign users to the new role, go to **People**, edit the user, and select the new role from the **Role** drop-down.

Project Roles

Project roles apply to individual projects. They let you control actions like viewing tasks, editing project details, or recording time entries. Default roles typically include **Member** and **Leader**, but you can create roles tailored to your workflows.

Viewing Project Roles

Navigate to **Settings** → **Roles** → **Project**. The default project roles will be listed, showing how many permissions and members each has.

“ **Example:** In the Project roles screen, you’ll see roles like *Member* and *Leaders*. The default role is highlighted, and you can create additional roles via the **Add Role** button. [Project roles overview](#)

+ Add Role

Creating a Project Role

1. Go to **Settings** → **Roles** → **Project** and click **Add Role**.
2. In the *Create role* modal, select **Blank role** or **Start from bundle**.
3. Provide a **Role name** and description (e.g., *Project Scheduler*).
4. Check **Make this the default role** if you want all new project members to receive this role by default.
5. Click **Create Role**.
6. The permissions editor will open. Enable project-specific permissions such as: - View project details - Edit tasks and milestones - Add or remove team members - Approve time entries
7. Assign the role within a project: open a project via **Projects**, go to its **Team** section, and select the new role for each user.

Organization Roles

Organization roles determine permissions within an organization under a tenant (for example, a subcontractor or department). These roles govern what users can do across multiple projects belonging to the same organization.

Viewing Organization Roles

Go to **Settings** → **Roles** → **Organization** to see existing organization roles. The role cards display the role name, description, and counts of permissions and members.

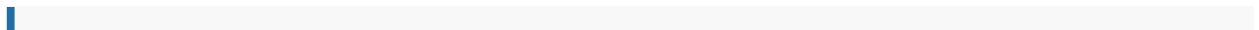
“ **Example:** The Organization roles page shows existing roles, like *Laborer*, and lets you add new roles via the **Add Role** button. [Organization roles overview](#)”

Creating an Organization Role

1. Navigate to **Settings** → **Roles** → **Organization** and click **Add Role**.
2. Choose **Blank role** or **Start from bundle**.
3. Enter a **Role name** (e.g., *Supervisor*) and optional **Description**.
4. (Optional) Set the role as the default for new organization members by checking the corresponding box.
5. Click **Create Role**.
6. In the permissions editor, configure organization-level permissions, such as: - Manage users within the organization - View all projects under the organization - Edit organization details
7. Assign users by editing their profiles in **People** or via the **Organization** page and selecting the new role.

Creating a New Role – General Process

Regardless of scope (Application, Project, or Organization), the process for creating a new role follows the same pattern. The modal shown below is the standard *Create role* form:



+ Create tenant role ×

How would you like to start?

Blank role Start from bundle

Role name *

e.g., Site Manager

Description

Optional description

Make this the default role for new tenant members

Cancel Create Role

Steps:

1. **Open the Roles page for the desired scope** (Application, Project, or Organization).
2. Click **Add Role**.
3. **Choose a starting point:** - **Blank role** - Start with no permissions and add only what you need. - **Start from bundle** - Clone an existing role's permissions as a template.
4. **Name the role** - Choose a clear and descriptive name that reflects the role's purpose.
5. **Add a description** (optional) - Provide context for team members on when to use this role.
6. **Set as default (optional)** - If this role should automatically apply to new members within the scope, enable the default option.
7. Click **Create Role**.
8. **Configure permissions** - After creation, you'll be directed to a page where you can toggle individual permissions. These may differ between scopes (e.g., project tasks vs. organization management).
9. **Assign users** - Go to the relevant area (People, Project Team, or Organization) and assign the new role to users.

Best Practices

- **Use descriptive role names** so team members understand their purpose (e.g., "Project Scheduler" instead of "Custom Role 1").

- **Limit privileges:** only assign users the permissions they need to perform their tasks. Start with a default role and add permissions as necessary.
 - **Review regularly:** periodically audit roles and assignments to ensure permissions align with current responsibilities.
 - **Test new roles** with a non-critical user account to ensure the permissions work as expected before assigning them widely.
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Last Updated: 2025-11-12 (Managed by Bridge Platform Administration Team)

Projects

The **Projects** module is where you create, organize, and manage project work for the selected tenant (e.g., **AUSTIN DURHAM (PERSONAL)**). You can view current projects, create new projects, and manage access, documents, and settings for each project.

Projects List

When you open **Projects**, you'll see a list view with:

- **Tabs:** / (to switch between live projects and deleted ones)
- **Search:** a search box ()
- **Columns:** Project name, Type, Status

Filtering & Searching

- Use the / tabs to switch between project groups.
- Use to filter by project name.

Opening a Project

Click a project name (e.g., **Project A**) to open its project view.

Creating a Project

1. Go to **Projects**.
2. Click **Create Project**.
3. Fill out the **Project Details** form:
 - **Project Name** (required)
 - **Type** (required; selected from a list during creation)
 - **Color** (required; hex value)
 - **Description** (optional notes/scope/extra info)
 - **Parent Project** (optional — used to create a sub-project hierarchy)
4. Review "Setup Steps" (describing areas you can configure later, like location and access).

5. Click **Create Project** to save.

Important: Once created, some fields (like “Project Type”) may be read-only in settings depending on your configuration. Choose the type carefully during creation.

Managing a Project

Project Navigation

Inside a project you’ll typically see tabs like:

- **Dashboard**
- **Documents**
- **Settings**

Use the **Back** link at the top to return to the project list.

Project Dashboard (Project Summary)

The project dashboard gives a high-level overview, including:

- **People With Access** (count and direct assignments)
- **Organizations** (inherited access groups)
- **Documents** (document count and folders)
- **Subprojects**
- **Basic Information**
 - Type
 - Created date
 - Status
 - Location status (e.g., “No location” if not set)
 - Description status (e.g., “No project description...” if empty)
- **Quick Actions**
 - Open Documents
 - Manage Access (takes you into project settings)
 - Open Settings (core project actions)

Use these cards and quick actions to immediately see what's configured and where work needs to happen.

Project Documents

The **Documents** tab lets you manage project files and folders.

Common tools:

- `Grid` / `List` view toggle
- Folder navigation (e.g., `Home`)
- `Actions` menu (for uploads/folder creation, depending on permissions)
- `Open Trash` to view deleted documents/folders

If the folder is empty, you'll see guidance to upload files or create a new folder.

Project Settings

Project settings is where you edit identity and manage access.

Details (Identity)

You can edit:

- Project Name
- Project Color
- Parent Project
- Description

Typical buttons include:

- **Reset**
- **Save Details**

⚠ Note: Project Type may be read-only (depends on your configuration).

Access (Assignments)

Access includes:

- Adding organizations (inherited access)
- Adding users (direct access)

Assignments let you review direct assignments, inherited organization access, and effective access sources in one view.

Best Practices

- **Name consistently:** Use a naming convention (job number + short description) to keep search results clean.
 - **Use parent projects intentionally:** Only create sub-projects if it improves reporting or access clarity.
 - **Review access regularly:** Use the project dashboard's counts and quick actions to spot missing access, missing documents, and empty structure.
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People

Bridge Admin Portal - Bridge Services LLC

Overview of People Tab

The **People** section manages everyone with access to the Bridge platform, including administrators, project managers, foremen, and safety officers.



Features

1. People Directory

Displays all registered users, including their:

- Name
- Email
- Phone Number
- Pay Group

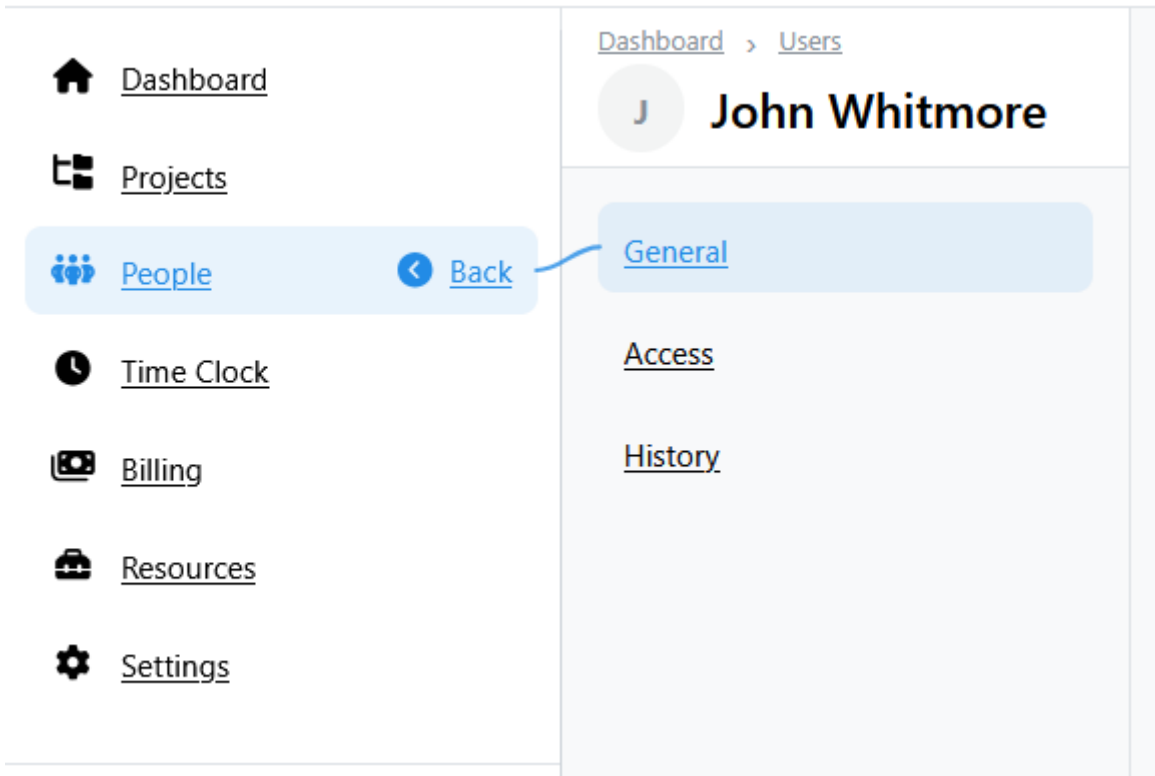
Search people...

Person ▼	Email	Phone	Pay Group
 Raden Ch McSupervisor	raden.c [REDACTED]	+1 (907) [REDACTED]	None
 Robert Roe Worker	rober [REDACTED]	+1 (602) [REDACTED]	None

☐ Viewing & Managing an Individual User

When you click on a user in the directory, you're taken to that user's profile page. This page is organized into three tabs — **General**, **Access**, and **History** — with an **Edit** button in the top-right corner.

 **Edit**

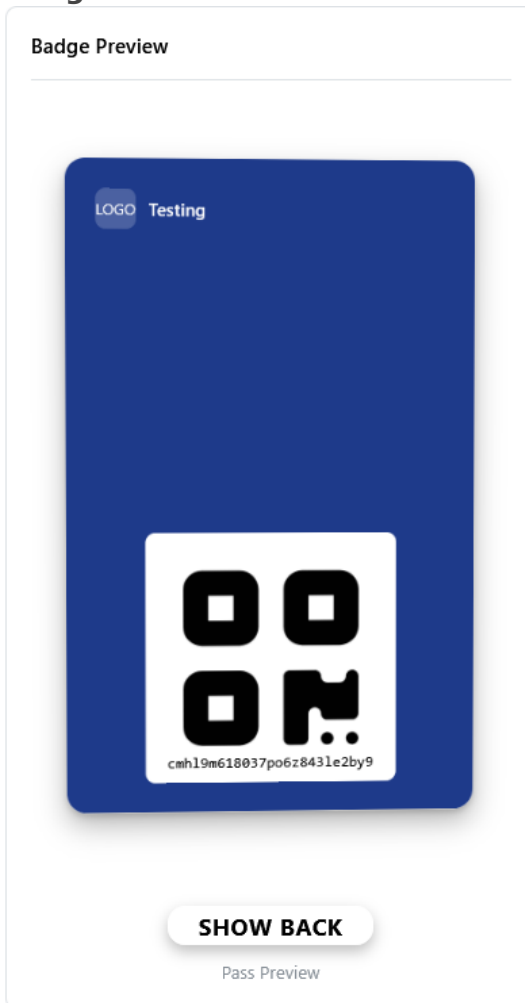


☐ General Tab

The **General** tab contains personal details and employment information:

- **General Information**
 - **First Name / Last Name** – required fields.
 - **Email** – used for login and notifications.
 - **Phone Number** – optional contact number.
 - **Language** – the user’s preferred UI language.
 - **Title** – job title or role descriptor (e.g., Laborer, Supervisor).
 - **Photo** – upload a headshot or ID photo (shows as “No photo” if blank).
- **Employment & Pay Rate**
 - **Employment Type** – e.g. Full-Time, Part-Time, Contract.
 - **Pay Rate** – hourly or salary rate; used for payroll & billing reports.
 - **Pay Frequency** – Weekly, Bi-weekly, Monthly, etc.
 - **Billing Type** – determines how the user’s time is billed (if applicable).

• Badge Preview



- A mock-up of the user's ID badge showing your company logo and the user's name/photo.
- This updates as you edit the photo or name.

You can click **Edit** to modify any of the above fields, upload a photo, or update pay rate and employment details.

“*Example, in Order:

General Information

First name *	Last name *
<input type="text" value="John"/>	<input type="text" value="Whitmore"/>
Email *	Phone number
<input type="text" value="whitmore.j@co.com"/>	<input type="text" value="(333) 333-3333"/>
Language *	Title
<input type="text" value="English"/>	<input type="text" value="Laborer"/>


Step 2.)

General Information

First name *	Last name *
<input type="text" value="John"/>	<input type="text" value="Whitmore"/>
Email *	Phone number
<input type="text" value="whitmore.j@co.com"/>	<input type="text" value="(333) 333-3333"/>
Language *	Title
<input type="text" value="English"/>	<input type="text" value="Manager"/>

Step 3.)

 Cancel

 Save changes

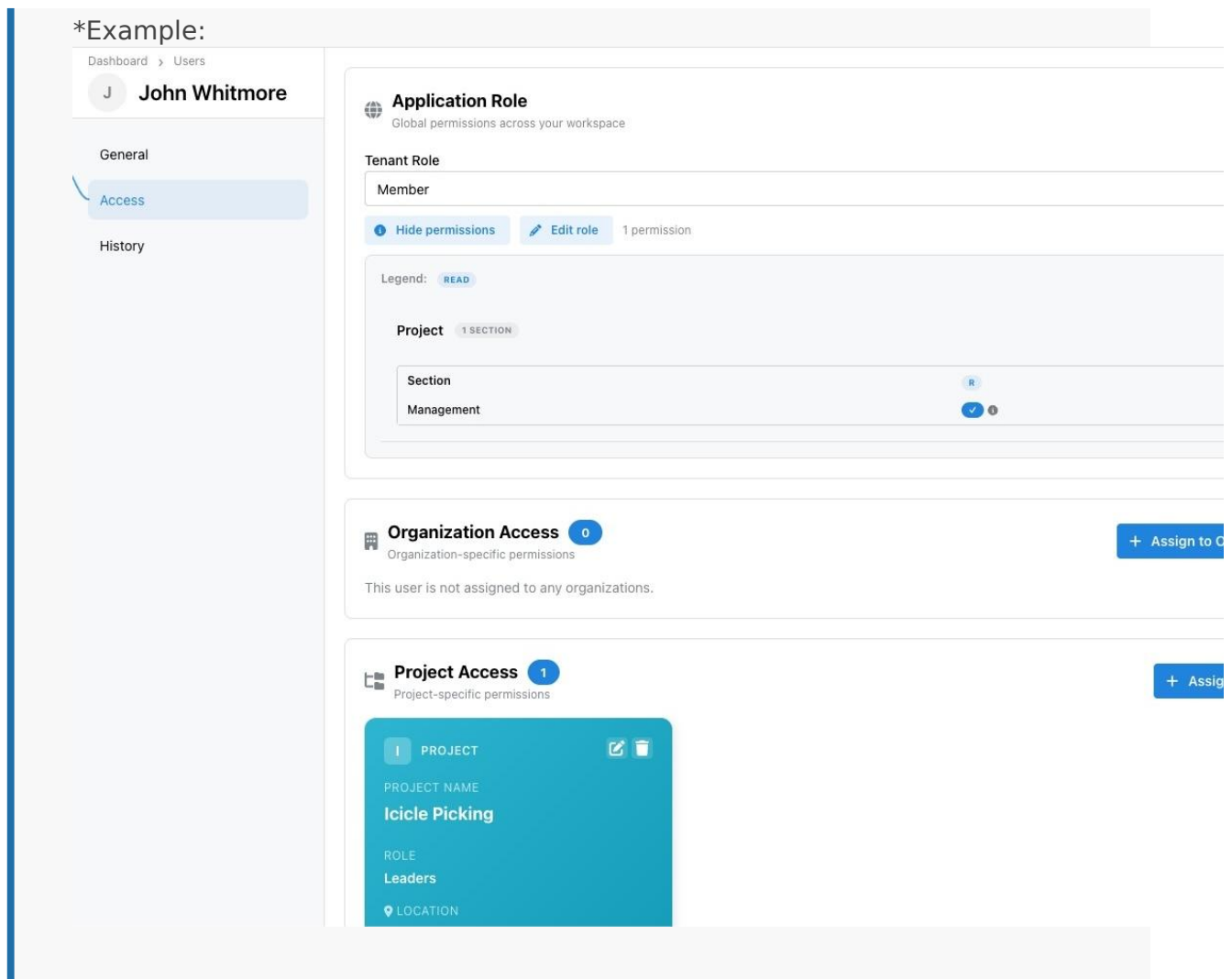
☐ Access Tab – Detailed Overview

The **Access** tab is where you manage a user's permissions across the Bridge platform. It's divided into three panels: **Application Role**, **Organization Access**, and **Project Access**.

☐ Application Role

This section controls the user's global (tenant-level) role.

- **Tenant Role Picker:** A dropdown where you assign the user's platform-wide role (e.g., Member, Leader, Administrator).
 - Changing this role affects what the user can do across all tenants (if they belong to multiple).
- **View Permissions:** Opens a modal listing all permissions granted by the selected role. Use this to review what the user can see or manage.
- **Edit Role:** Takes you to the role configuration page (if you have permission) where you can adjust the underlying permissions of that role.



☐ Organization Access

This panel lists the organizations (sub-entities under a tenant) that the user belongs to and lets you assign new ones.

- **Assign to Organization:** Opens a search dialog where you can pick an organization and assign the user a specific **Organization Role** (e.g., Supervisor, Laborer).
- **Organization Cards:** Once assigned, each organization appears as a card showing:
 - Organization name and description
 - User's role in that organization
 - Quick action icons (edit role or remove user)
- If the user isn't part of any organizations, a message such as "This user is not assigned to any organizations." will appear.

☐ Project Access

This section handles project-level assignments and permissions.

- **Assign to Project:** Opens a picker to select a project and choose a **Project Role** (Leader, Member, or a custom project role).

- **Project Cards:** For each project assigned, a card displays:
 - Project name and client
 - Role (e.g., Leaders, Member)
 - Location (address) for quick reference
 - Icons to **edit** (change role) or **remove** (unassign user) — typically a pencil/edit icon and a trash bin icon.
- You can add a user to as many projects as needed, each with its own role. Removing a user from a project here immediately revokes their access to project files, tasks, and time clock entries.

☐ Tips for Using the Access Tab

- **Granularity:** Use the Application Role to set the user's baseline permissions, then tailor their Organization and Project roles for more granular control.
- **Bulk Assignments:** If you need to add a user to multiple projects or organizations, you can do so one after another without leaving this tab.
- **Audit Changes:** Any change you make here (assigning, removing, or changing roles) will appear in the **History** tab with a timestamp, creating an audit trail.

By using the Access tab, administrators can quickly see and adjust where a user is active, ensuring they have the correct level of access across the Bridge platform.

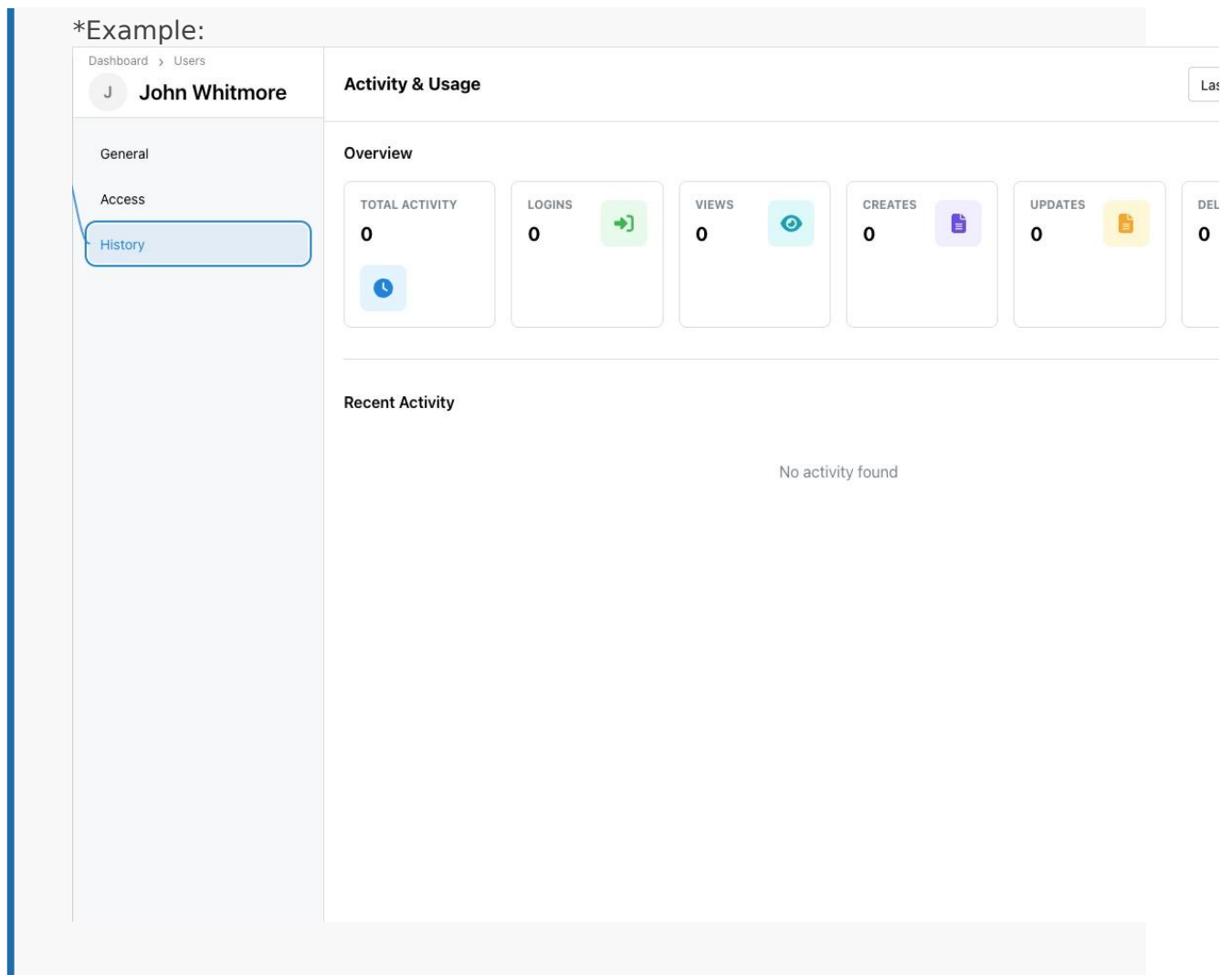
☐ History Tab

The **History** tab provides an audit log of the user's activity and account events:

- **Invitation Sent** - Date/time the account was created or invitation email was sent.
- **Password Resets** - Records of password reset requests and completions.
- **Role Changes** - When roles are added, changed, or removed.
- **Project Assignments** - When the user is added to or removed from a project.
- **Login Activity** - Time stamps of the user's last successful login (if logged).

This log helps administrators troubleshoot account issues and maintain compliance.





✎ Editing & Deactivating

- Click the **Edit** button to update personal details, change a user's email, upload a photo, or modify pay rates.
- To **deactivate** a user, change their status to **Inactive**; they will no longer be able to log in, but their records remain for auditing.
- You can also **reset a user's password** from the Edit view if they have trouble logging in.

These additional details ensure administrators understand what information they can view and manage when inspecting an individual user's profile. Feel free to include a screenshot of a user's profile page:contentReference[oaicite:0]{index=0} to visually support this explanation.

2. Adding a User

1. Click **Add User**.
2. Fill out user details (name, email, role, assigned tenant).
3. Set an initial password or send an invite link.
4. Save to complete registration.

3. Editing or Deactivating Users

- To edit, select a user and update their details.
 - To deactivate, toggle their status to **Inactive**; they'll no longer appear in active lists.
-

Permissions and Roles

Role	Description
Administrator	Full platform access including settings, billing, and user management.
Project Manager	Manage projects and documents within assigned tenants.
Foreman	Log work hours, upload safety reports, and manage field data.
Safety Officer	Oversee safety documentation and compliance forms.

Common Workflows

Invite New Users

1. Navigate to **Users**.
 2. Click **Add User** and choose "Send Invite."
 3. The user will receive an email to set up their account.
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Documents

Document Management in Projects

The Bridge platform includes a built-in document repository for each project. This ensures that all files (plans, permits, photos, invoices, etc.) are tied to the correct job and only accessible to users assigned to that project.

☐☐ How Documents Are Tied to a Project

- **Per-Project Libraries:** Every project has its own Documents tab. Files stored here live only within that project and do not appear elsewhere in the system.
- **Folder Hierarchy:** Documents can be organized into folders and sub-folders. A “root” folder is created automatically for each project; you can add additional folders for phases, trades, or document types.
- **Permissions Inherit Project Roles:** Access to a project’s documents is controlled by project roles (e.g., Member, Leader). Users cannot see documents for projects they’re not assigned to.

☐☐ Navigating the Documents Tab

- **Grid / List View:** Toggle between a thumbnail grid and a traditional list for easier browsing. Use the “Grid” or “List” buttons in the top toolbar.
- **Breadcrumb Navigation:** A breadcrumb trail appears at the top of the file view (e.g., `Home / Concrete / 2025-11-12`). Click any breadcrumb to jump back to a parent folder.
- **Actions Menu:** The **Actions** button lets you create a new folder, upload files, or perform bulk actions (depending on role permissions).

☐☐ Uploading Files

You can add documents to a project in two ways:

1. Drag & Drop Upload

- Simply select files from your computer and drag them into the file area.
- A drop zone appears, and the upload begins automatically.
- You can drag multiple files at once; upload progress indicators will show status for each file.

2. Upload via Actions Menu

- Click the **Actions** button and choose **Upload Files**.
- Select one or more files in the file picker dialog and confirm.

During upload, files are stored in the current folder you're viewing. To upload into a sub-folder, navigate into that folder before dragging the files in.

📁 Organizing & Managing Files

- **Create Folder:** Use the **Actions** menu or right-click (if supported) to create a new folder. Name it appropriately (e.g., `Blueprints`, `RFI Responses`).
- **Move / Rename / Delete:** Depending on your permissions, you can drag a file into another folder to move it, or use context actions to rename or delete.
- **File Types:** The system supports common file formats (PDF, DOCX, XLSX, images, etc.). Large files will upload as long as they don't exceed the configured file-size limit.

⚙️ Actions Menu Options

Within the Documents tab, an **Actions** button appears in the top-right corner. This menu adapts based on what you have selected and your permissions. Here's what each option does:

Menu Option	When It Appears	What It Does
Upload Files	Always visible	Opens a file-picker so you can choose one or more files from your computer. Files are uploaded into the current folder.
Create folder with [n] selected	Visible when one or more items are selected	Creates a new folder and moves the selected file(s)/folder(s) into it. You'll be prompted to name the new folder. Useful for organizing items after upload.
Rename	When a single file or folder is selected	Allows you to change the name of the selected item. Simply type the new name and confirm.
Move	When one or more items are selected	Opens a dialog to choose a destination folder within the same project. Use this to reorganize files or folders.
Download	When one or more items are selected	Downloads the selected file(s) or folder(s) to your computer. If multiple items are selected, they may be downloaded as a ZIP archive.

Menu Option	When It Appears	What It Does
Delete	When one or more items are selected (and you have permission)	Permanently removes the selected items from the project's document library. A confirmation prompt will ask you to confirm before deletion.

Notes:

- Options like **Rename**, **Move**, **Download**, and **Delete** are context-sensitive: they only appear when you have selected one or more items in the document list/grid.
- Permissions assigned via project roles determine whether you can see and use these actions. For example, a read-only role may not see **Delete**.
- To select multiple items, use the checkboxes or hold `Ctrl`/`Cmd` (depending on your OS) and click each item.

Including these descriptions will help users understand what each action does and reduce the chance of accidental file movements or deletions.

□ Best Practices

- **Maintain a Clear Structure:** Use folders for phases or disciplines (e.g., `Framing`, `Electrical`, `Inspections`) so team members can find files quickly.
- **Version Control:** When updating drawings or specs, include version dates in filenames (e.g., `FloorPlan_v2_2025-11-12.pdf`) to avoid confusion.
- **Permissions Checks:** Before inviting external collaborators, review their project role to ensure they have access only to the files they need.

By organizing documents within each project and leveraging drag-and-drop uploads, teams can keep plans and records centralized, improving collaboration and reducing the risk of misplaced files.

Time Clock

Bridge Admin Portal - Bridge Services LLC

Overview

The **Time Clock** page allows administrators and managers to review and manage employee work hours. It supports both manual entry and real-time clock-ins from connected job sites.

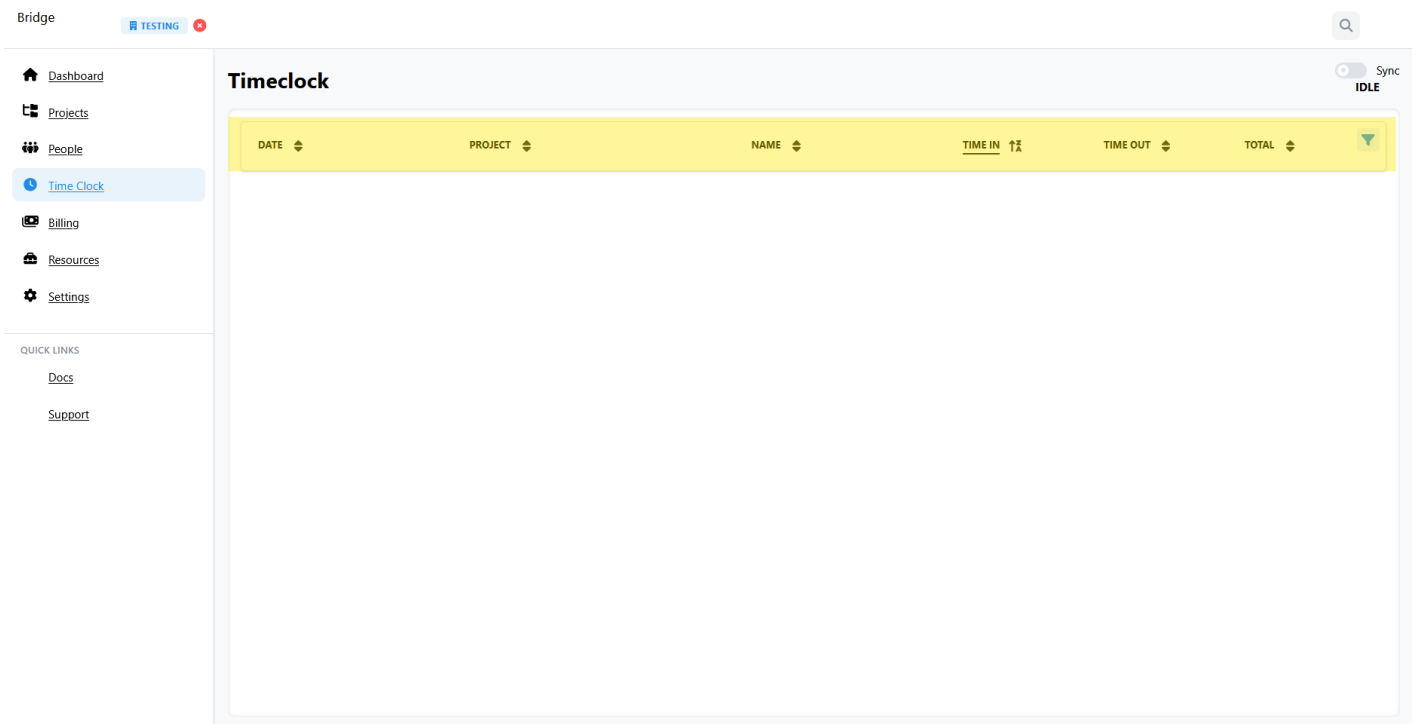
Features

1. Viewing Time Entries

Displays all logged hours by user, tenant, and project. Includes filters for:

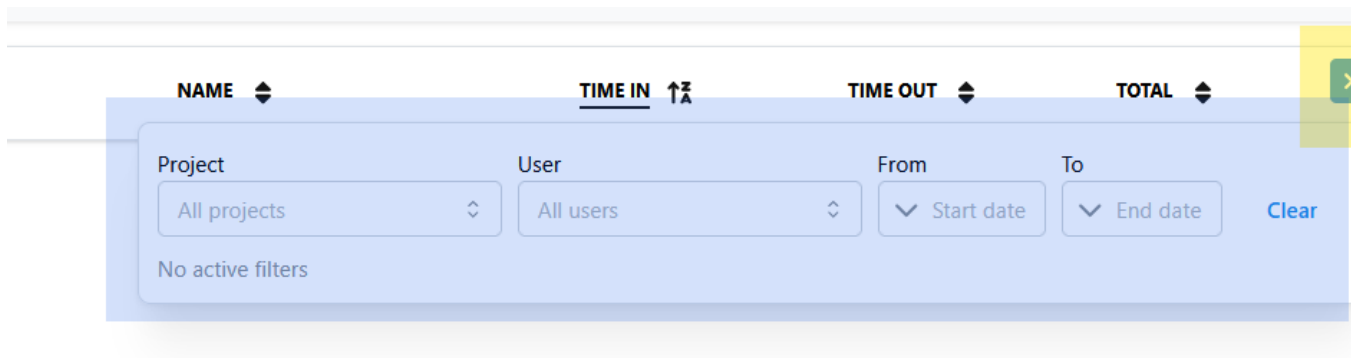
- Date Range
- Tenant
- User Role
- Project Name

Highlighted in Yellow



Additionally:

- You may add multiple filters using the funneling button **Highlighted in Yellow**.
- You can filter specific parameters **Highlighted in Blue** from Projects to User, and even choose a start and end date.



2. Adding Manual Time

1. Click **Add Entry**.
2. Select user and project.
3. Enter start and end times.
4. Add optional notes for work type or location.

5. Click **Save**.

3. Editing or Approving Time

Supervisors and admins can:

- Edit incorrect entries.
 - Approve or reject time submissions.
 - Export approved hours to billing or payroll.
-

Common Workflows

Approve Weekly Hours

1. Select the **Current Week** filter.
2. Review total hours by project.
3. Approve all or individual entries as needed.

Correct Time Errors

1. Locate the entry.
 2. Click **Edit** to adjust time values.
 3. Save changes to update records system-wide.
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Tips

- Ensure all employees clock in/out via authorized devices for accuracy.
 - Reconcile time logs before exporting to billing.
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Billing

Bridge Admin Portal - Bridge Services LLC

Overview

The **Billing** module consolidates invoicing, payments, and financial tracking across tenants and projects.

Features

1. Invoices

- View all generated invoices.
- Filter by tenant, project, or status (Paid/Unpaid/Pending).
- Export invoices as PDF or CSV.

2. Creating a New Invoice

1. Click **Create Invoice**.
2. Select the tenant and project.
3. Add line items for materials, labor, or custom charges.
4. Click **Save** and review before sending.

3. Payments

- Record received payments and reconcile against invoices.
 - Automatic totals are calculated in real time.
-

Common Workflows

Generate Weekly Billing

1. Filter by **Current Week**.
2. Click **Batch Create Invoices**.
3. Review totals and export as a single combined file.

Track Outstanding Balances

1. Sort invoices by **Status: Unpaid**.
 2. Send reminders or mark invoices as paid after verification.
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Tips

- Maintain consistent invoice numbering for clarity.
 - Double-check project associations before submission.
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Resources

Bridge Admin Portal - Bridge Services LLC

Overview

The **Resources** page provides a central repository for documents, forms, and templates used across the Bridge platform.

Features

1. Document Repository

- Browse categorized folders (Safety, HR, Operations, etc.).
- Preview or download resources directly from the browser.

2. Uploading a Resource

1. Click **Upload Resource**.
2. Select file type and category.
3. Add a title and optional description.
4. Click **Save** to publish it system-wide.

3. Managing Resources

- Rename, move, or delete files with appropriate permissions.
 - Use search to locate resources by keyword or category.
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Common Workflows

Update Safety Forms

1. Navigate to **Resources > Safety**.
2. Upload the revised form.
3. Mark the previous version as archived.

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Settings

Bridge Admin Portal - Bridge Services LLC

Overview

The **Settings** page is where administrators configure Bridge platform preferences, security, and integrations.

Features → Company Badge Design

The **Features** tab in Settings gives administrators control over optional modules and personalization. One of the key options is **Company Badge Design** — a template editor used to produce ID badges for employees and subcontractors. These badges are used on-site for identification, geofenced time clocking, and QR code scanning.

Overview

When you open **Settings** → **Features** → **Company Badge**, you'll see a **Company Badge Design** page. This page contains:

- A live preview of the badge on the right.
- A multi-tab editor on the left: **Basic Info**, **Appearance**, **Front Fields**, and **Back Fields**.
- *Cancel* and *Save Template* buttons to discard or save your changes.

Edits update the preview in real time so you can see how the badge will look when printed or displayed digitally.

Basic Info

The **Basic Info** tab sets the core text shown on every badge.

- **Logo Text** – Optional text displayed next to your company’s logo (e.g., the tenant name). Leave it blank if you only want the logo.
- **Description** – Required; this text is used as an accessibility description for screen readers. It should explain that the pass is an employee identification badge.

You can edit both fields and see changes update immediately in the preview. Use concise, descriptive wording, especially for the accessibility description.

Appearance

The **Appearance** tab customizes colors to match your branding.

- **Background Color** – Controls the card’s background color. Enter a hex code (e.g., `#ef4444` for red) or use the color picker.
- **Foreground Color** – Sets the primary text color. Choose a high-contrast color to ensure legibility.
- **Label Color** – Specifies the color of the smaller field labels (e.g., “Phone number”). This should contrast against both the background and foreground colors.

Adjusting these values immediately updates the badge preview. Use your company’s brand palette so badges are recognizable at a glance.

Front Fields

Use the **Front Fields** tab to decide which user properties appear on the front of the badge. There are two sections:

Header Fields

- These are small, single-line fields that appear near the top right of the badge (e.g., Department or Status).
- Click **Add Field** to create a new header field.
- Each field has:
 - **Label** – The caption that appears on the badge (e.g., “Phone”, “Email”).
 - **Value** – A content editor where you can type free text or insert user variables (like phone number or email). Select variables from the dropdown or type them manually.
 - **Text Alignment** – Choose left, center, or right alignment for the field.
- You can add multiple header fields, but keeping it to one or two maintains readability.

Primary Fields

- These are larger, prominent lines that display key information (like the user's name or title):contentReference[oaicite:0]{index=0}.
- Click **Add Field** to insert another primary field.
- Each primary field contains:
 - **Label** - Shown above the value if provided.
 - **Value** - Use variables such as `First name`, `Last name`, `Title` to build the display (e.g., "Visionary Johnny Appleseed").
 - **Text Alignment** - Controls how the text aligns within the available space.
- Typical primary fields include the person's full name and job title. Multiple primary fields will stack vertically on the badge.

Use variables wherever possible so the badge pulls live data from each user's profile rather than static text.

Back Fields

The **Back Fields** tab lets you configure information that appears on the reverse side of the pass. This is often used for emergency contacts, terms and conditions, or safety information.

- Click **Add Field** to create a new back-side field.
- For each field, enter:
 - **Label** - The category (e.g., "Emergency Contact").
 - **Value** - Enter free text or insert user variables like phone numbers.
 - **Text Alignment** - Usually center-aligned for readability.
- You can add multiple back fields; they will display in the order created. Use these to add safety instructions or important contact numbers.

Use the **Show Back** button in the preview to flip the badge and view the back side. Adjust fields as needed until the back fits your content.

Saving & Applying Changes

Once you're satisfied with the badge design:

1. Click **Save Template** at the top right.
2. The new design becomes the default badge for all tenants within the platform (unless tenant-specific overrides are supported).
3. Users' badges will update the next time they are viewed or generated (for example, in the **Users** profile page or printed ID cards).

If you need to discard changes, click **Cancel** to revert to the previous template.

Tips for Designing Your Badge

- **Keep It Simple:** Too many fields can clutter the badge. Focus on the most essential information: name, title, tenant/company, and one or two contact points.
 - **Use User Variables:** Inserting user variables (like phone numbers or job titles) ensures each badge stays up to date without manual edits.
 - **Brand Consistency:** Match badge colors and fonts to your company's branding guidelines to strengthen recognition on job sites.
 - **Accessibility:** Write a clear description under "Description" for screen readers, and choose color combinations with sufficient contrast.
 - **Test Print:** After saving a template, print a few sample badges or generate digital passes to ensure legibility and correct sizing before deploying widely.
-

By leveraging the Company Badge editor's tabs — Basic Info, Appearance, Front Fields, and Back Fields — Bridge administrators can create professional, branded identification cards that reflect company identity and contain essential employee information. The live preview helps you see changes instantly and ensures the badge meets your requirements.

Common Workflows

Update Branding

1. Navigate to **Settings > General**.
2. Upload the Bridge logo and adjust color palette.
3. Click **Save Changes** to apply site-wide.

Manage Security Settings

1. Open **Settings > Access**.
 2. Enable or enforce two-factor authentication.
 3. Review access logs for unusual activity.
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Tips

- Review settings quarterly to ensure compliance with internal IT policies.

- Document configuration changes for audit purposes.
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