PeloServe

Business Guide

Everything you need to run your cleaning or property-service business on PeloServe — scheduling, invoicing, payments, and getting found by new customers.

peloserve.co.uk

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What PeloServe Is

PeloServe is a back-office and marketplace platform for local service businesses — cleaning, gardening, pest control, and similar trades. It does two jobs at once:

- Runs your business day to day: staff, schedule, customers, recurring rounds, quotes, invoices, payments, SMS reminders, expenses, payroll, and simple profit-and-loss reporting.
- Brings you new customers: your business gets a public profile on peloserve.co.uk, and customers there can request quotes that land directly in your Leads inbox.

Two apps, one account: the mobile app (staff clock-in/out, photos, on-the-go visit management) and the web portal at app.peloserve.co.uk (the fuller back-office — Staff, Invoices, Reports, Manage). Solo-plan businesses use the mobile app only; Starter and above unlock the web portal too.

Getting Started

- Sign up at app.peloserve.co.uk/register (or via the mobile app) with your business name, your name, email, password, and country — this sets your currency (GBP/EUR/USD).
- Every plan starts with a 14-day free trial, no card required.
- Verify your email with the 6-digit code sent to your inbox — this also happens at every login as a security step (login OTP).
- Once in, you land on Today — your at-a-glance view of what's scheduled.
- Add your first Service Type (e.g. "Window Cleaning"), then your first Customer and Property, and you're ready to book work.

Setting Up Your Business

Service Types

Manage → Service Types. The jobs you offer — name, description, optional default price. These populate the dropdown everywhere you build a quote, invoice, or round.

Business Profile

Manage → Business Profile. Your public-facing page on peloserve.co.uk — logo, cover image, bio, service area. This is what customers see when they find you through the marketplace.

Posts

Manage → Posts. Short updates shown on your public profile (before/afters, seasonal offers). Post limit scales with your plan — 1 on Solo up to 20 on Business.

Settings

Manage → Settings. SMS reminder toggle and custom sender name, and VAT registration — once "VAT registered" is on, VAT is added to new invoices and quotes automatically at the rate you set.

Email Domain

Manage → Email Domain (Business plan). Send invoice and quote emails from your own domain instead of PeloServe's.

Staff & Schedule

Staff

Add a staff member with their name, email, and a password you set for them — share that password so they can sign into the mobile app. Staff limits scale by plan: owner-only on Solo, 3 on Starter, 10 on Pro, 20 on Business.

Staff use the mobile app to confirm shifts, get directions, clock in/out on site, and capture before/after photos. Owners see all of this from the web portal's Staff detail pages.

Schedule

Manage → Schedule. Assign staff to upcoming shifts across your rounds, day by day.

Rounds

Manage → Rounds. Recurring schedules — set a start time and duration once, and PeloServe generates the visits going forward. This is how repeat customers (weekly window cleans, fortnightly gardens) run themselves.

Customers & Properties

Manage → Customers. Add customers and their addresses/access notes — the record everything else (rounds, quotes, invoices) attaches to.

Quotes & Leads

Pro plan and above.

Leads

Manage → Leads. Quote requests submitted by customers on peloserve.co.uk land in an open pool visible to every business in the area — first to Claim gets it and can see the customer's full details and reply. Claimed requests move to "Mine."

Quotes

Manage → Quotes. Build a priced quote (line items, price, optional preferred date) and send it by email or SMS. When the customer accepts, PeloServe books it straight into your schedule automatically — no separate step. From a claimed lead, "Create Quote" prefills a new quote with that customer's details.

Invoices & Getting Paid

Invoices

Create an invoice against a customer, add line items, set a due date. PeloServe emails (or texts, as a fallback) the customer automatically with a link to pay and Direct Debit instructions if set up.

Card payments (Stripe)

Solo and Starter collect through PeloServe's own Stripe account — a small platform fee applies, deducted automatically, nothing for you to do. Pro and Business can connect their own Stripe account instead — PeloServe takes 0% once connected, though the platform option stays available as a fallback.

Direct Debit (GoCardless)

Pro/Business, UK only. Connect your own GoCardless account from Manage → Payments by pasting an access token and webhook secret from your GoCardless dashboard. Collections go straight to your account.

Customers get a payment-confirmed notice automatically the moment an invoice is marked paid, however it was paid.

Reports

Outstanding balances, payments received, and a per-round breakdown — drill into any number to see the underlying invoices.

SMS Reminders

Starter plan and above.

Turn on visit reminders in Settings — customers get a text ahead of their scheduled visit. Runs on credits: buy top-up packs (Manage → SMS Credits, from £10 for 100 credits) or, on Pro/Business, get 150 free credits every month automatically. Pro and Business can also set a custom sender name so texts arrive from your business name instead of a phone number. Full send history lives in Manage → SMS History.

Expenses, Accounts & Payroll

Expenses

Manage → Expenses (Starter+). Log business costs — fuel, supplies, insurance, and more — against a fixed set of categories, with VAT captured if you're VAT-registered.

Accounts

Manage → Accounts (Starter+). A simple profit-and-loss view — income from paid invoices, minus expenses (and payroll, if applicable) — by month. A snapshot of this month's numbers also appears on Reports.

Payroll

Manage → Payroll (Business plan). Log staff pay and generate downloadable payslips. Staff can see their own payslips from the mobile app.

Your Public Profile & the Marketplace

Every business gets a page at peloserve.co.uk/businesses/your-business — logo, bio, services, posts, and reviews. After a visit is completed, the customer automatically gets a review-request link; ratings and comments show up on your public profile (you can also resend that link manually). This profile is also where new customers request quotes that land in your Leads inbox — the better it looks, the more leads convert.

Billing & Your Plan

- Plans: Solo (£18/mo), Starter (£29/mo), Pro (£59/mo), Business (£99/mo) — prices exclude VAT. Every plan includes a 14-day free trial.
- Annual billing is available on every plan at a discount (8–12% depending on tier) — pay once a year instead of monthly.

- Upgrading takes effect immediately; downgrading is scheduled for the end of your current billing period, so you keep what you're paying for until it renews — no surprise loss of access.
- Manage your plan, payment history, and cancellation from Manage → Billing & Plan (or the Profile page).
- If a subscription lapses, you get a short grace period before the account locks (7 days) — reactivating restores everything as it was.

Feature	Solo — £18/mo	Starter — £29/mo	Pro — £59/mo	Business — £99/mo
Staff	Owner only	3	10	20
Web portal	Mobile app only	Included	Included	Included
Photo storage	500 MB (30-day retention)	1 GB	5 GB	15 GB
Cloud backup	—	Included	Included	Included
SMS reminders	—	Included	Included + 150 free/mo + custom sender	Included + 150 free/mo + custom sender
Expenses & Accounts (P&L)	—	Included	Included	Included
Quotes & Leads marketplace	—	—	Included	Included
Own Stripe / own GoCardless account	—	—	Included	Included
Payroll / payslips	—	—	—	Included
Own email domain	—	—	—	Included
Live chat with staff	—	—	—	Included
Public profile posts	1	5	10	20

Getting Help

- Support (Manage → Support): message PeloServe directly, or reply to a complaint a customer raised about your business.
- Chat (top nav, Business plan): live chat with your staff from the web portal.
- The customer-facing site's FAQ and Contact page cover marketplace/customer questions.

Ready to Get Started?

Sign up at app.peloserve.co.uk/register — every plan includes a 14-day free trial, no card required. If you'd rather watch than read, look for the PeloServe walkthrough video on YouTube.