



Client Check

User Guide • Quick Start

Client Confirmation Checklist

Drawing points • Room checklist • Quotes • Invoices • PDF

app.adamelectrical.co.nz

Adams Apple Electrical • 2026



Client Check

First sign-in: enter your company name. It is the name of this workspace; you can change it later under Settings → Account.

Company

Language

☐ 中文☒ English☐ English + 中文

☐ I have read and agree to the Terms of Use and Privacy.

[Terms and Conditions](#)

Enter

1 Sign in

Open app.adamelectrical.co.nz in your browser

- No password: enter your email → "Send code" → the 6-digit code from the email → "Sign in". A code is valid for 10 minutes; check your junk folder if it does not arrive, and resend after one minute.
- First sign-in (left): enter your company name — that is your workspace; your checklists, drawings and invoices all live under this account. Choose the app language (中文 / English / English + 中文 ; change it any time under Settings → Language). Tick "I have read and agree to the Terms of Use and Privacy" to enter.
- A device you have signed in on stays signed in; you only need a new code after 90 days without use, or after "Sign out all devices" on another device.
- Add it to your home screen and it opens like an app, full screen, no address bar — iPhone / iPad: Safari "Share" → "Add to Home Screen"; Android: Chrome menu " ⋮ " → "Add to Home screen" (some phones say "Install app"), confirm and the icon appears.
- Switch accounts: Settings → Account → "Sign out", then sign in with another email.

Tip The home-screen icon and the browser open the same account and the same data. One account can be signed in on 2 devices at a time (phone + tablet, or phone + computer); a 3rd device has to wait for one to sign out, or be added (page 16).

[Settings](#)
[Account](#)

Account

Sign-in email and company name. To switch accounts, sign out first; "Sign out all devices" makes every other phone / tablet / computer sign in again with a new code.

Email

john@demo-electrical.co.nz

Company

Demo Electrical Ltd

Subscription

Subscription: active(renews automatically)
Plan: monthly
Renews / expires: 30 Oct 2026

Manage payment · card / billing / cancel

Devices

Signed in 2 / 2 · included 2
When full, a new device can't sign in — sign one out to make room.

iPhone · Safari

Last used Today 13:25 · Signed in on 17 Sept 2026

This device

iPad · Safari

Last used Today 10:26 · Signed in on 25 Sept 2026

Sign out

Add a device · NZ\$99 + GST / month

Terms

Privacy

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Sign out

Sign out all devices

Checklist

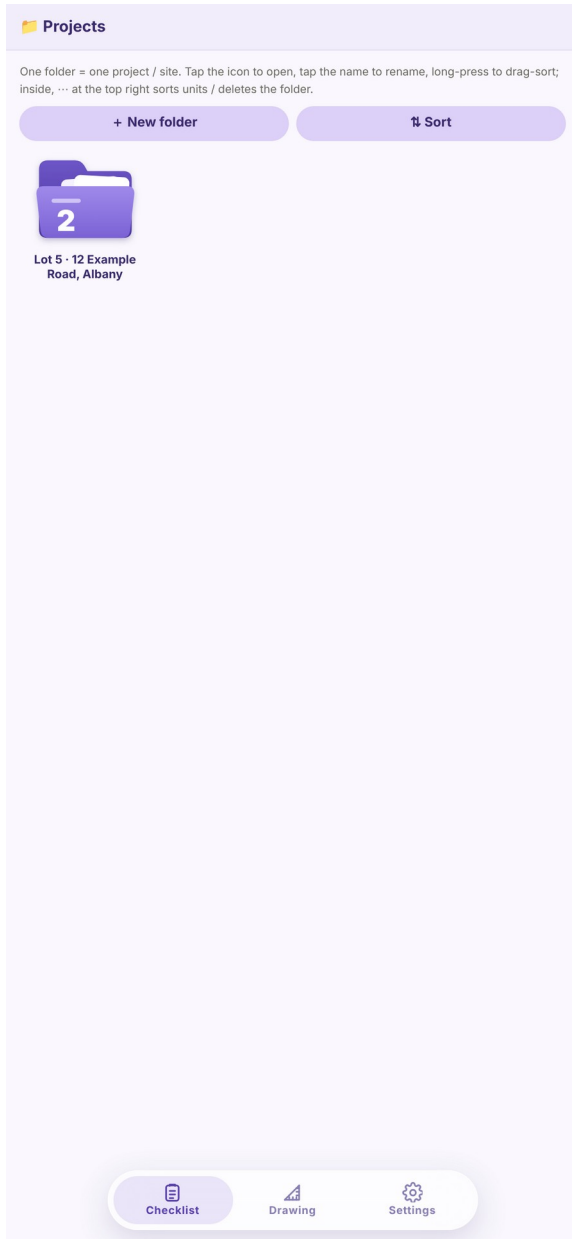
Drawing

Settings

2 Account & subscription

Bottom bar Settings → Account

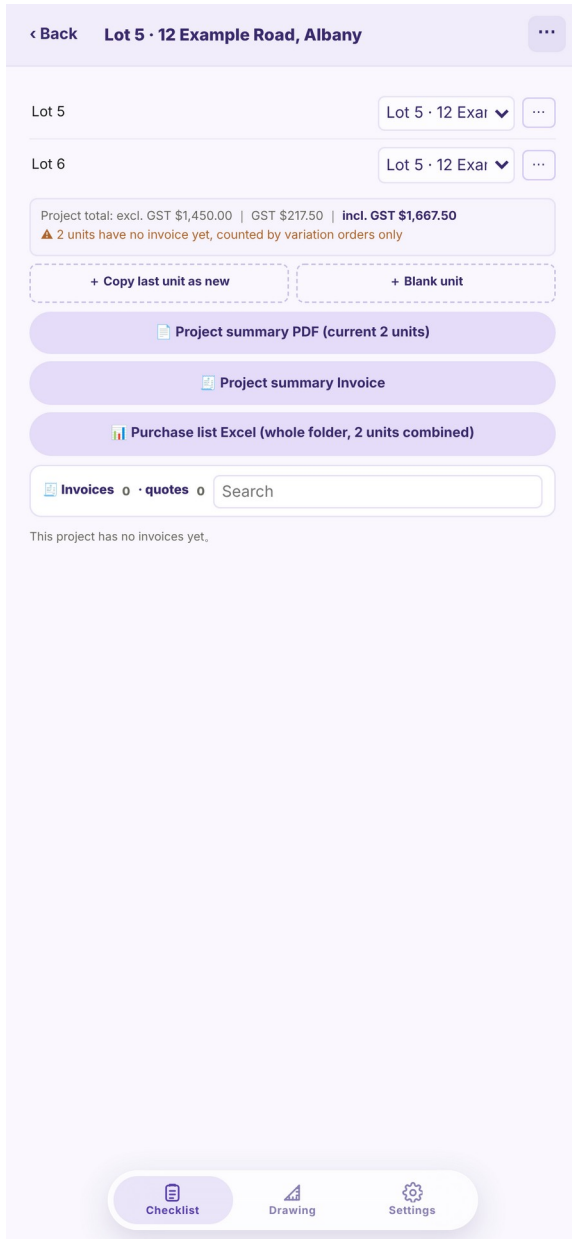
- Account card: sign-in email and company name (the workspace name; the owner can change it). The company details printed on PDFs and emails are filled in under Settings → Companies.
- New accounts get a 3-day trial; email sending is off during the trial. When the trial or subscription ends the app shows the expiry page (page 17); subscribing restores access immediately.
- Two plans: monthly NZ\$199 + GST, yearly NZ\$2,000 + GST. The button opens the Stripe payment page and returns to the app after payment.
- Once subscribed the card shows status, plan (monthly / yearly) and the renewal date; "Manage payment" changes the card, shows invoices and cancels. After cancelling you keep access until the end of the paid period.
- Devices card: lists the signed-in devices and lets you sign one out; "Add a device" is NZ\$99 + GST / month or NZ\$1,000 + GST / year (page 16).
- "Terms" and "Privacy" are always available here. "Sign out" signs out this device only; "Sign out all devices" makes every other phone / tablet / computer sign in again with a new code.



③ Projects: folders

The app opens on this page; the bottom-bar "Checklist" tab brings you back here

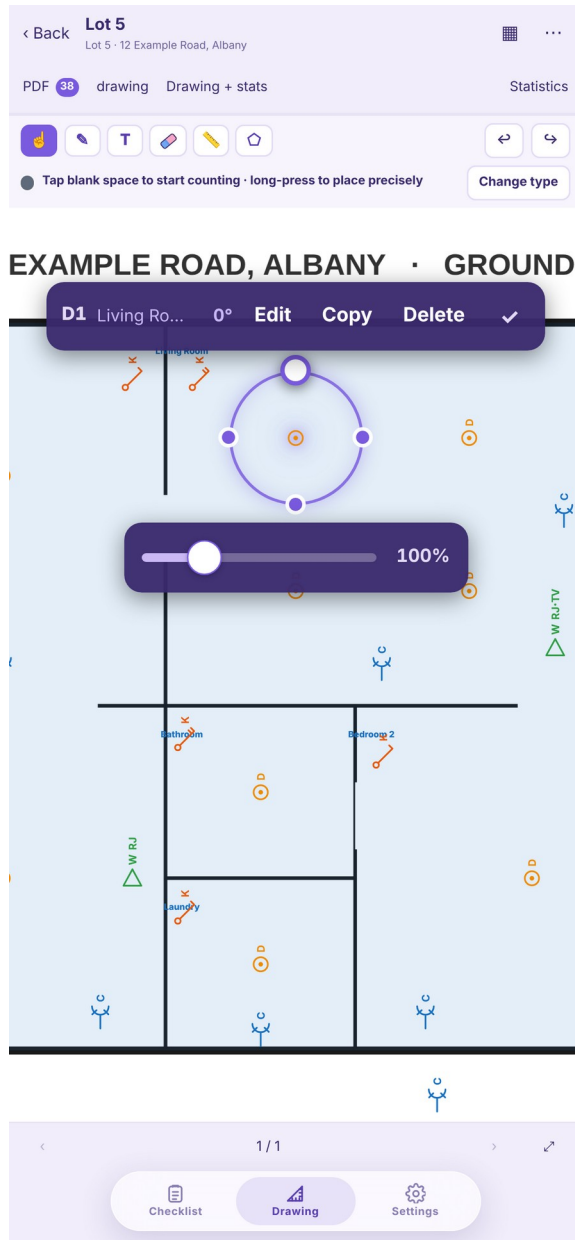
- One folder = one project / site, holding every unit of that site (one unit = one drawing + one checklist + its own quotes and invoices).
- " + New folder" to name one; tap the folder icon to open it, tap the name to rename, long-press and drag to reorder; the number on a folder is how many units it holds.
- "↕ Sort" reorders in bulk; inside a folder the "... " at the top right sorts units or deletes the folder.
- Units not in any folder sit under "Ungrouped" at the bottom.



4 Inside a folder: new units

Projects → open a folder

- One row per unit: tap the name to open its checklist; the dropdown on the right moves it to another folder or to Ungrouped; "... " deletes. A unit is renamed in the "Project name" field at the top of its checklist.
- " + Copy last unit as new": for identical layouts on the same site, copy the previous unit's rooms and points and adjust — the fastest way. " + Blank unit" starts from scratch.
- Project total: every unit in the folder combined — excl. GST / GST / incl. GST; units without an invoice are counted by their variation orders, and the page says so.
- Folder-level output: project summary PDF, project summary invoice, purchase list Excel (whole folder).
- Below: every invoice and quote raised in this folder, searchable.



5 Drawing: placing and editing points

Bottom bar "Drawing" → the folder's drawing list → " + Upload drawing PDF"

- Uploaded PDFs sync to the cloud automatically and are fetched on your other devices. One drawing per unit; it can have several pages.
- Place a point: long-press anywhere on the drawing → choose the type (switches: gangs and mechs; data panels: ports) → the point is placed. "Change type" changes the type being placed.
- Tap a marker to select it: the buttons above it are Edit / Copy / Delete; press and drag to move it; rotate with the outer ring handle or tap the 0 / 90 / 180 / 270 marks; the slider below sets its size.
- Toolbar: 🖐️ select, ✎️ pen, T text, 🧼 eraser, 📏 measure, 🏠 room outline (tap around the room, tap the first point to close). Points inside an outlined room go into that room on the checklist automatically.
- Pinch to zoom and pan, double-tap to zoom in. "Statistics" lists points by type; tap a row to jump to it on the drawing.
- PDF at the top: "Drawing" exports the drawing only, "Drawing + stats" adds the statistics table; 📄 shows / hides layers.

6 Checklist

Bottom bar "Checklist" → Room-by-room

- Rooms outlined on the drawing get their points mirrored in automatically: those rows are tagged "drawing" and their quantity follows the drawing (change it on the drawing, not here). Rows you add yourself are tagged "manual".
- Each row has a "type" field (printed on the confirmation form), a camera icon for photos of that row, a "PDF" button for that row's photo PDF, and an eye = leave this row out (next page).
- " + Add room" picks a room type and brings its default points; " + Add point" picks from the point library.
- Outdoor: points outside any room outline land here; " + Add default points" pulls the outdoor defaults set in Settings.
- Further down: whole-house layout & systems, extra variation orders (from the VO catalog — pick a mode, enter a quantity, subtotal and GST are calculated), confirmation notes (from a template), remarks.
- Four buttons at the top: Cost / Quote / Invoice / Checklist (the client confirmation PDF).

The screenshot shows a mobile application interface for managing electrical points room-by-room. At the top, there's a 'Room-by-room' header with a 'PDF' button and a 'Collapse all' toggle. Below this, the interface is divided into sections for different rooms. The 'Garage' section is currently active, showing a list of points: '1-gang Switch', 'Light point', and 'Power point'. Each point has a 'type' field, a camera icon for photos, a 'PDF' button for the point's photo PDF, and a quantity selector (e.g., 'x 1'). A '+ Add point' button is at the bottom of the list. Below the points, there's a 'Notes' field with the placeholder text 'Other notes for this room...'. The 'Living Room' section is also visible below the 'Garage' section, showing points like '2-gang Switch', 'Light point', 'Power point', and '2-port Data panel'. The bottom bar has three buttons: 'Checklist', 'Drawing', and 'Settings'.

7 Leaving a row out

The eye on the right of every checklist row

- Tap it and the row is greyed and marked "hidden": it stays on the checklist and its quantity still follows the drawing, but it is left out of the client confirmation PDF, photo PDFs, "Fill from checklist" on quotes / invoices, and the cost page. Tap again to restore.
- Use it for points that are drawn but not being quoted this time (for example a batch of outdoor lights whose positions are still open) — no need to delete them from the drawing.
- Remembered by block + row name: once "Light point" in Outdoor is off it stays off however many outdoor lights you draw later; "Light point" inside the living room is a separate row with its own eye, and so is every gang variant (1-gang / 2-gang).
- The drawing page, drawing PDF and drawing statistics are not affected.

The screenshot displays the 'Room-by-room' interface of the Client Check app. It shows two room sections: 'Garage' and 'Living Room'. Each section has a header with the room name, a 'Drawing' label, and buttons for 'PDF' and 'Collapse all'. Below the header, there is a checklist of items. Each item has a name, a 'drawing' label, a quantity indicator (e.g., 'x 1'), and a status indicator (e.g., 'Off' or an eye icon). Below the checklist, there is a '+ Add point' button. At the bottom of each section, there is a 'Notes' field with the placeholder text 'Other notes for this room...'. The bottom of the screen features a navigation bar with three icons: 'Checklist', 'Drawing', and 'Settings'.

Room-by-room PDF Collapse all

Garage Drawing PDF ...

1-gang Switch drawing x 1 Off

type PDF

Light point drawing x 1

type PDF

Power point drawing x 1

type PDF

+ Add point

Notes

Other notes for this room...

Living Room Drawing PDF ...

2-gang Switch drawing x 1

type PDF

Light point drawing x 4

type PDF

Power point drawing x 2

TV wall PDF

2-port Data panel (incl. x1 RJ45 data - x1 TV) drawing x 1

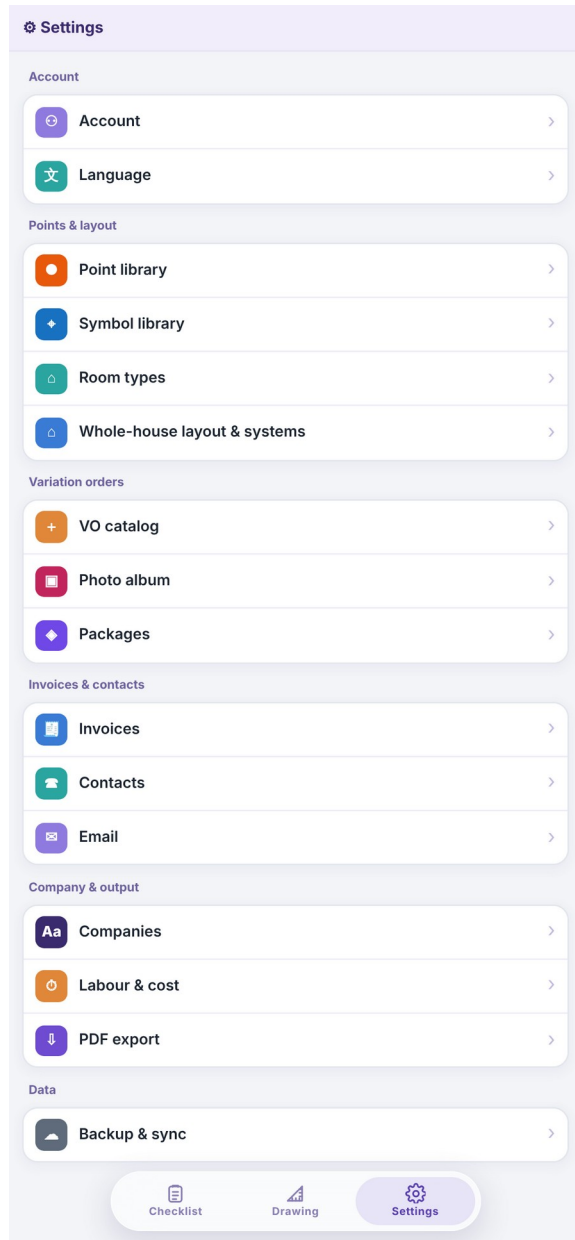
type PDF

+ Add point

Notes

Other notes for this room...

Checklist Drawing Settings



8 Settings: the libraries

Bottom bar "Settings"

- Account / Language: subscription, devices, terms; app language (page 14).
- Point library: the single source. Drawing points, checklist additions, room types and the cost library all come from here. Each type has a name, letter, colour and symbol; switch types take gangs + switch mechs, data panels take ports + data mechs; types can be grouped. Symbol library: how symbols look on the drawing. Room types: each with a set of default points and quantities. Whole-house layout & systems: per-unit items (alarm, socket / switch upgrade, switchboard upgrade...).
- VO catalog: the variation-order list; each item has three modes (install only / supply + install / supply only) priced separately. Photo album holds product photos. Packages: whole-unit checklist templates — "Save as package" on the checklist page, load with the "Package" button at the top.
- Invoices: standalone invoices not tied to a unit; Contacts: clients to pick when invoicing; Email: reply-to addresses and the default message.
- Companies: name, logo, GST number, bank account (printed on PDFs); Labour & cost: rough-in and fit-off minutes and material cost per point type; PDF export: watermark, encryption, terms, note templates, included-product photos.
- Backup & sync: sync now, pull from cloud, cloud usage (page 18).

Cost · Lot 5

Done

38 points · per point 0.89 h

per point \$124.21

Indoor

9 rows · 30.92 h · \$4,158.38

Switch 1-gang × 5

3.33 h · \$385.67

Rough-in min

Fit-off min

Materials \$

25

15

12

Exclude

Switch 2-gang × 2

1.67 h · \$199.73

Rough-in min

Fit-off min

Materials \$

30

20

18

Exclude

Switch 3-gang × 1

1.00 h · \$122.60

Rough-in min

Fit-off min

Materials \$

35

25

24

Exclude

Data panel 1-port × 1

0.92 h · \$100.88

Rough-in min

Fit-off min

Materials \$

30

25

12

Exclude

Data panel 2-port × 1

0.83 h · \$99.87

Rough-in min

Fit-off min

Materials \$

35

15

18

Exclude

RJ45 data × 2

1.50 h · \$225.30

Rough-in min

Fit-off min

Materials \$

30

15

36

Exclude

TV × 1

0.92 h · \$100.88

Rough-in min

Fit-off min

Materials \$

35

20

12

Exclude

Power point × 12

11.00 h · \$1,459.00

Rough-in min

Fit-off min

Materials \$

40

15

30

Exclude

Light point × 13

9.75 h · \$1,464.45

Rough-in min

Fit-off min

Materials \$

25

20

36

Exclude

Outdoor

2 rows · 2.42 h · \$346.88

Power point × 1

0.92 h · \$121.58

Checklist

Drawing

Settings

9 Cost

Top of the checklist page: "Cost"

- Labour and materials for every point type on this unit's checklist: three fields per row — rough-in min, fit-off min, materials \$ — with defaults from Settings → Labour & cost; numbers changed here apply to this unit only (marked "this unit").
- The line at the top: total points, hours per point, cost per point. Three sections: indoor / outdoor / whole-house layout & systems.
- "Exclude" = leave this row out of the total. Rows hidden on the checklist show greyed here and are not counted.
- At the bottom: hourly rate \$/h, number of site visits, difficulty uplift % — the total is calculated. After the job, enter the actual hours and compare with the estimate.
- Output: cost PDF, detailed version; purchase list PDF / purchase list Excel (materials for this unit); "Put total into invoice" carries the total to the invoice.

Quotation · V1

Done

Pending
Q0107102026 V1

V1
+ New quote
Convert to Invoice
Delete V1

Details

Client

John Smith
Contacts

Address (one line per part)

12 Example Road, Albany

Quote Date

10/07/2026

Quote Number (auto, editable)

0107102026

Reference (optional, this document only)

Valid until

11/06/2026

Lines

Every line comes from the checklist: change points and variation orders on the checklist page, then tap "Fill from checklist" again (unit prices on point lines are typed by hand and always kept). Standalone invoices / quotes have no checklist, add lines yourself.

Fill from checklist
Incl. GST

Garage: Switch 1-gang×1, Light point×1, Power point×1
Living Room: Switch 2-gang×1, Light point×4, Power point×2, Data panel RJ-TV×1
Kitchen: Switch 3-gang×1, Light point×2, Power point×2
Dining: Light point×1, Power point×1
Bedroom 1: Switch 1-gang×1, Light point×1, Power point×2, Data panel RJ-TV×1

38
110
\$4180.00

Variation Orders

EV charge: 7 kW
Supply + install

Checklist
Drawing
Settings

10 Quotation

Top of the checklist page: "Quote"

- The first tap creates V1 with an automatic quote number. Every line comes from the checklist: change points and variation orders on the checklist page, then tap "Fill from checklist" again; unit prices on point lines are typed by hand and always kept.
- A unit can have several versions: " + New quote" copies the current one as V2, V3... under the same number. Status: pending / accepted / expired (expires automatically after the validity date, or set it by hand). Validity defaults to 30 days.
- Stages: one row per stage — description, % or amount, date; printed under "Payment" on the quote and carried over when converted to an invoice.
- "Convert to Invoice": lines, stages and client are copied into this unit's invoice and this version is marked accepted.
- Output: attach the checklist (the client confirmation form follows the quote), terms on / off, the language of this PDF; export the quote PDF or email it to the client directly.

DE

TAX INVOICE

John Smith
12 Example Road, Albany

Invoice Date
7 Oct 2026
Invoice Number
0107102026
GST Number
123-456-789
Reference

8 Sample Street, Albany,
Auckland 0632
Tel: 021 000 0000
Email:
office@demo-electrical.co.nz

Description	Quantity	Unit Price	Amount NZD
Garage: Switch 1-gang×1, Light point×1, Power point×1 Living Room: Switch 2-gang×1, Light point×4, Power point×2, Data panel RJ ×1 Kitchen: Switch 3-gang×1, Light point×2, Power point×2 Dining: Light point×1, Power point×1 Bedroom 1: Switch 1-gang×1, Light point×1, Power point×2, Data panel RJ ×1 Bathroom: Switch 2-gang×1, Light point×1 Laundry: Switch 1-gang×1, Light point×1, Power point×1 Bedroom 2: Switch 1-gang×1, Light point×1, Power point×2 Bedroom 3: Switch 1-gang×1, Light point×1, Power point×1 Outdoor: Light point×2, Power point×1	38.00	110.00	4180.00
Variation Orders			
EV charger 7 kW - Supply + install	1.00	1450.00	1450.00
Due Date: 7 Oct 2026		Project	4180.00
Demo Electrical Limited		Variation Orders	1450.00
Bank Account: 12-3456-7890123-00		Subtotal	5630.00
		TOTAL GST 15%	844.50
		TOTAL NZD	6474.50
		Less Amount Paid	0.00
		AMOUNT DUE NZD	6474.50

PAYMENT ADVICE

To: Demo Electrical Limited
8 Sample Street, Albany, Auckland 0632
Tel: 021 000 0000
Email: office@demo-electrical.co.nz

Customer John Smith
Invoice Number 0107102026
Amount Due 6474.50
Due Date 7 Oct 2026
Amount Enclosed
Enter the amount you are paying above

11 Invoice

Left: the Invoice produced by "Export Invoice PDF" • opened from "Invoice" at the top of the checklist page

- Two kinds: Final and Progress. The invoice number is generated automatically and can be edited; the due date follows the default days in "Invoice preferences".
- Lines are filled from the checklist (or converted from a quote); how switches are counted (one point per plate / per gang) and how data panels are counted is set in "Invoice preferences".
- Stages: one row per stage — description, % or amount (enter it excl. GST, GST is added; both empty = the remainder), date. Ticking "paid" adds it to the amount paid below; "Issue this stage" produces that stage's invoice, numbered -1, -2...
- Totals are calculated: Subtotal, GST 15%, TOTAL NZD, Less Amount Paid, AMOUNT DUE.
- Output: terms on / off, Draft (for the client to confirm first), editable file name, the language of this PDF → "Export Invoice PDF" or "Email to client".
- Standalone invoices not tied to a unit: Settings → Invoices.

Client John Smith	Date 2026-10-07
Job Lot 5	Note None
Address 12 Example Road, Albany	
Confirmed by Mike	

Whole-house Layout & Systems

Alarm System	× 1
--------------	-----

Room-by-room

1. Garage	
1-gang Switch	× 1
Light point	× 1
Power point	× 1

2. Living Room	
2-gang Switch	× 1
Light point	× 4
Power point	× 2 - TV wall
2-port Data panel (incl. × 1 RJ45 data × 1 TV)	× 1

3. Kitchen	
3-gang Switch	× 1
Light point	× 2
Power point	× 2

4. Dining	
Light point	× 1
Power point	× 1

12 Output: PDF and Excel

Left: the client confirmation form from "Checklist" at the top of the checklist page

- Client confirmation PDF: "Checklist" at the top of the checklist page. Client details, whole-house layout, every room's points and types, outdoor, variation orders, confirmation notes and included-product photos are all in it; terms, watermark and encryption follow Settings → PDF export.
- Photo PDFs: the "PDF" next to Room-by-room / Outdoor / Whole-house prints that block's point photos. Variation orders: VO PDF, VO invoice.
- Drawing page: PDF (drawing / drawing + stats); cost page: cost PDF, detailed version, purchase list PDF, purchase list Excel; quote and invoice pages: their own PDFs.
- Folder page: project summary PDF, project summary invoice, purchase list Excel for the whole folder.
- Long-press any PDF button to change the title / file name and pick this PDF's language first; a short tap exports straight away.
- Files go through the phone's share sheet: save to Files, AirDrop, WhatsApp, email — anything.

13 Email to client

"Email to client" at the bottom of the quote / invoice page

- The recipient comes from Contacts (or type it); replies go to the address set under Settings → Email; subject and message are pre-filled and editable; the PDF is generated and attached automatically.
- Tap "Send" and it goes out from the app — no mail app needed. The sender shows your company name, and the client's reply lands in your own mailbox.
- Sent emails are logged at the bottom of the invoice / quote page: time and recipient.
- Settings → Email: several reply-to addresses (the first is the default), the default message template, BCC yourself.
- Email is off during the trial and switched on once subscribed; up to 50 emails per account per day.

The screenshot shows the 'Send Invoice' modal overlaid on the 'Invoice (main)' screen. The modal has a 'Cancel' button at the top right. It contains the following fields and content:

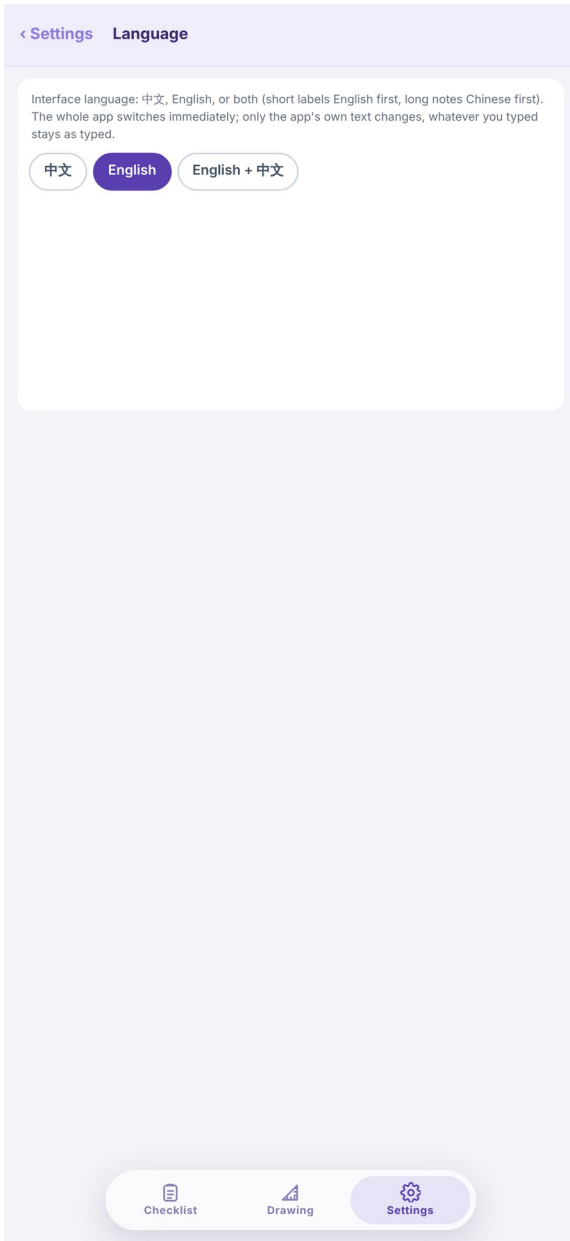
- To:** john.smith@example.com (with a 'Contacts' button to the right)
- Reply-to:** office@demo-electrical.co.nz (with a dropdown arrow)
- Subject:** Invoice 0107102026 – Lot 5
- Message:**

Hi John Smith,

Please find Invoice 0107102026.pdf attached. Let me know if you have any questions.

Demo Electrical Ltd
- Attachment:** Invoice 0107102026.pdf · From Demo Electrical Ltd <app@adamelectrical.co.nz>
- Send** button at the bottom left.

The background 'Invoice (main)' screen shows details for 'John Smith', '12 Example St', and '10/07/2026'. It also lists 'Lines' for various electrical services and a total of '\$4180.00'.



14 Language

Settings → Language

- Three modes: 中文 / English / English + 中文 (short labels English first then Chinese, long notes Chinese first then English). One tap switches the whole app, synced across your devices.
- Only the app's own text changes; everything you typed (client names, room names, point library, VO catalog, notes...) shows exactly as entered. For bilingual entries, type both languages yourself.
- PDF fixed text follows the app language by default; for a single PDF, pick its language: long-press the PDF button, or use the 中文 / English / 中 + 英 row under "Output" on the quote / invoice page.
- The language chosen at first sign-in sets the names of the default libraries (point library, room types...); switching later does not rename them — edit them yourself.

15 Signed-in devices

Left: what a 3rd device sees at sign-in • managed under Settings → Account → Devices



Client Check

Devices full (2/2)

This account is already signed in on the devices below. To use it here, sign one of them out on that device (Settings → Account → Devices) or add a device there, then come back and sign in again.

iPhone · Safari

Last used Today 13:26

iPad · Safari

Last used Today 10:27

[Use another email / sign in again](#)

- Each account includes 2 devices signed in at the same time. A 3rd device sees "Devices full 2/2" and the list of signed-in devices — it cannot kick another device out itself.
- On any signed-in device: Settings → Account → Devices → "Sign out" one of them, then go back to the 3rd device and sign in with a new code.
- To use one more device permanently: "Add a device", NZ\$99 + GST / month or NZ\$1,000 + GST / year, billed on the same cycle as the main plan. Trial accounts are fixed at 2 and cannot add.
- A device not used for 90 days drops out automatically.

16 Expired subscription

Opening the app after the trial ends, a cancelled plan runs out, or a payment fails

- Once expired this is the only page: subscribe monthly / yearly, manage payment, refresh status, sign out. Checklists, drawings and PDFs are not reachable.
- Subscribe here; after payment the app returns and access is restored immediately. Failed payment: change the card under "Manage payment", then "Refresh status".
- Data is kept for 30 days after expiry, with a reminder email 7 days before deletion; re-subscribe within 30 days and everything is back as it was; after 30 days it is deleted automatically and cannot be recovered.
- Refunds are set out in the Terms of Use; questions to app@adamelectrical.co.nz.



Client Check

Demo Electrical Ltd

Subscription expired

Subscription ended on 05 Oct 2026 ,Renew to keep using the app.

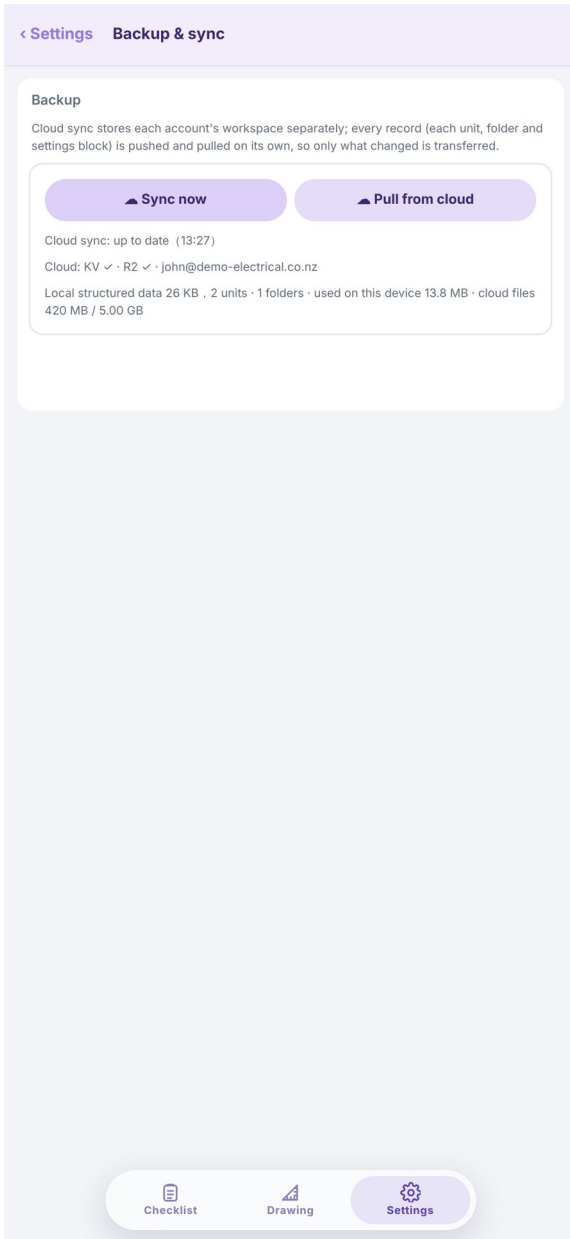
Subscribe · Monthly NZ\$199 + GST

Subscribe · Yearly NZ\$2,000 + GST

Manage payment · card / billing

Refresh status

Sign out



17 Cloud sync • backup • FAQ

Bottom bar Settings → Backup & sync

- Changes are saved on the device first and pushed to the cloud 30 seconds after you stop (60 seconds while editing a drawing); switching apps or closing the page pushes immediately. Sign in on another device with the same account and the data and drawings come down automatically.
- Backup page: "Sync now" / "Pull from cloud" for a manual round; below it the sync status, cloud status and usage — each account has 5 GB of cloud files (drawing originals, photos); delete unused ones when it is full.
- No code arriving → check junk, or resend after a minute. "Session expired" → sign in with a new code and carry on; nothing is lost.
- Expiry page → page 17. A change not showing on another device → "Sync now" here, "Pull from cloud" on the other one. After 7 days without reaching the cloud the app locks; go online and tap "Refresh status".

Tip Questions: Adams Apple Electrical · app@adamelectrical.co.nz · +64 22 159 8899