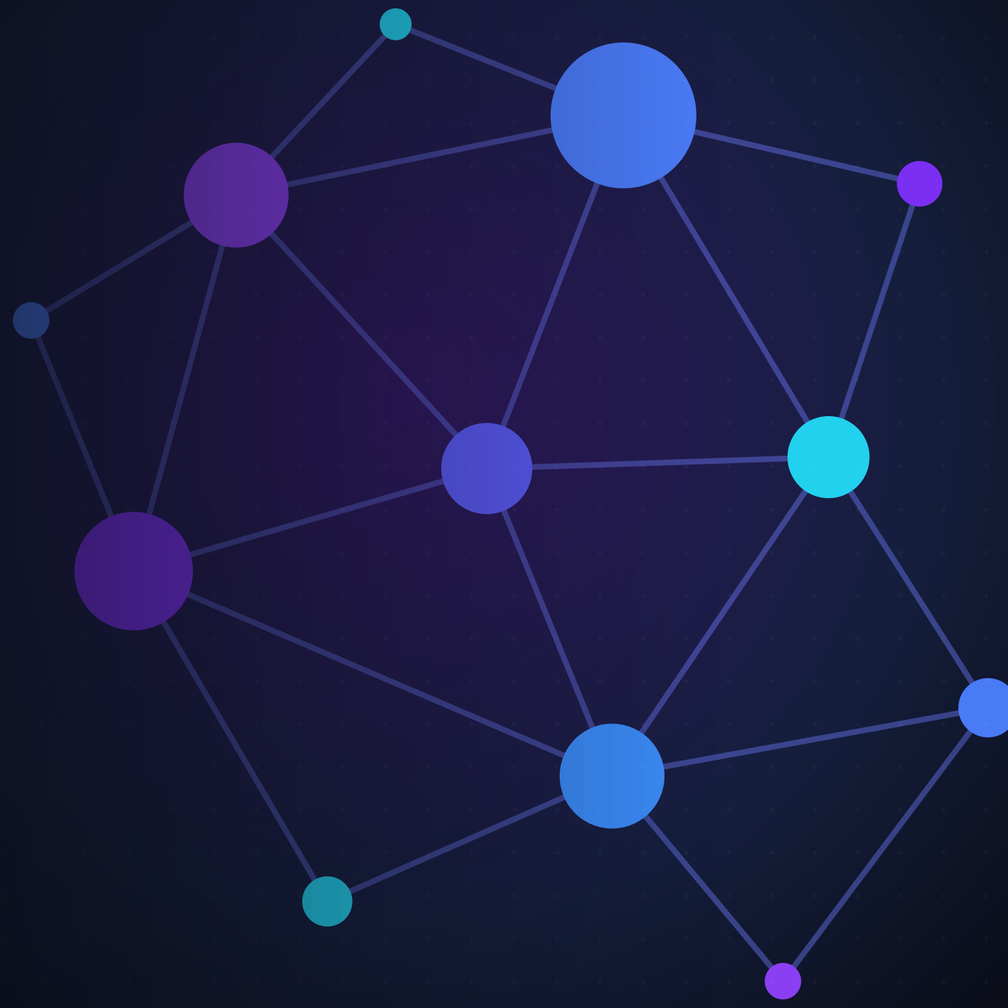
PRODUCT PRESENTATION

Every job, client and part in one place

WorkSmartHub: work tickets from the first call to the paid invoice, on your own server.

WorkSmartHub · version 24



WorkWise Solutions

SIMPLIFY THE BORING PART OF WORK

Where does a job live today?

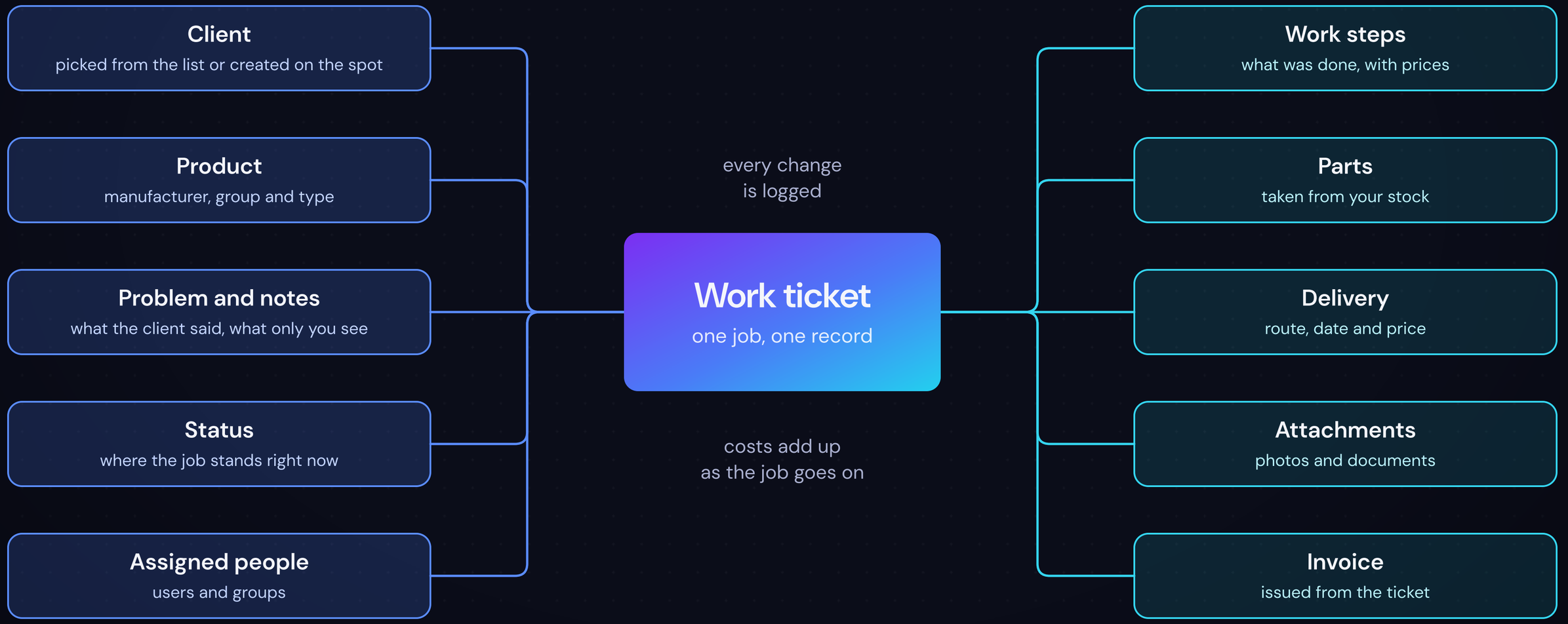


WHAT IT COSTS

- Nobody sees the whole job at once
- The client has to call to learn where it stands
- A part runs out and nobody notices
- A job is finished but never invoiced

The data of one job sits in five places, and **none of them knows about the others**.

One work ticket holds the whole job



Everything about a job is on one screen, and **everyone looks at the same record**.

Made for teams that work on jobs for clients

Service and repair shops

Intake, quote, repair, parts, handover and invoice on one ticket, with a printed intake sheet for the client.

Maintenance and installation teams

Jobs in a calendar, technicians who see only their own tickets, site visits and deliveries with prices.

Companies with several teams

One installation, a workspace per team, shared clients and catalogue, separate tickets and permissions.

IT and operations

Company sign-in, a full audit log, your choice of database and file storage, an API for integrations.

If your work arrives as a job and ends with a handover, **this is your tool**.

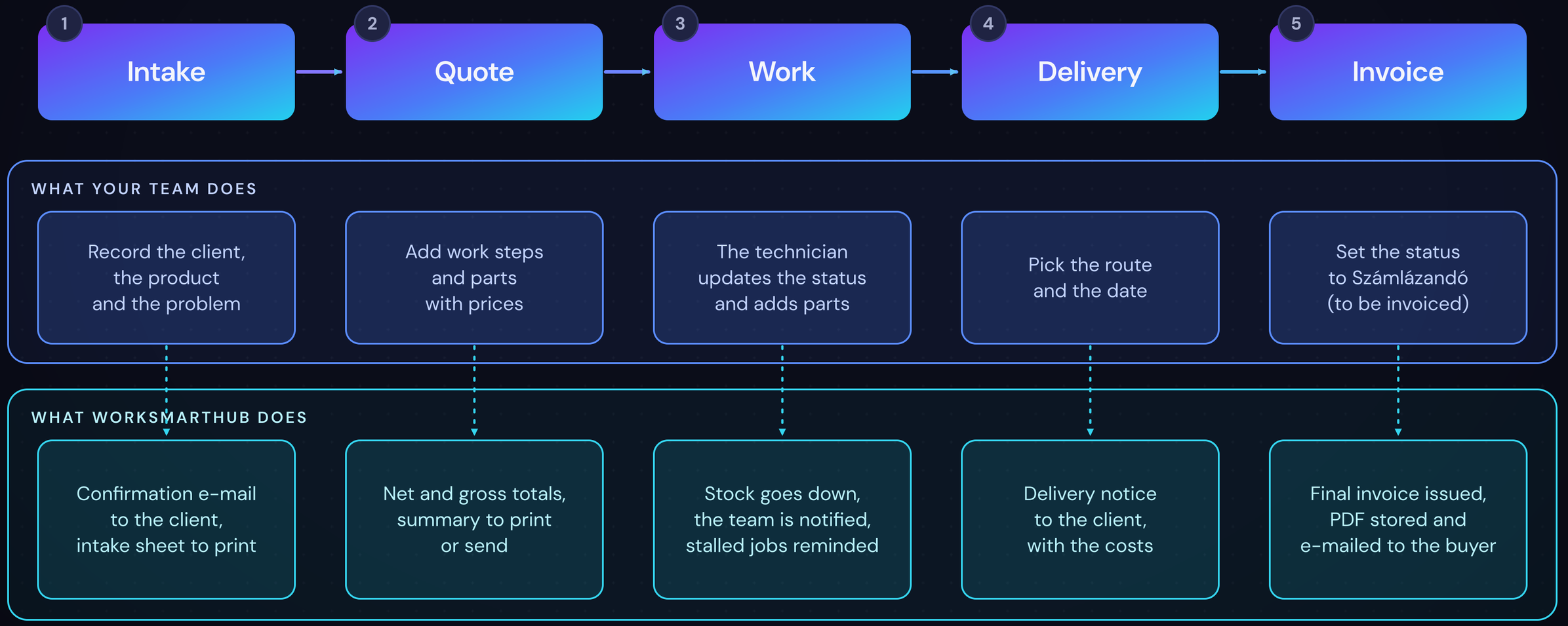
PART 01

The journey of a job

From intake to invoice, and what the system does at every stop.

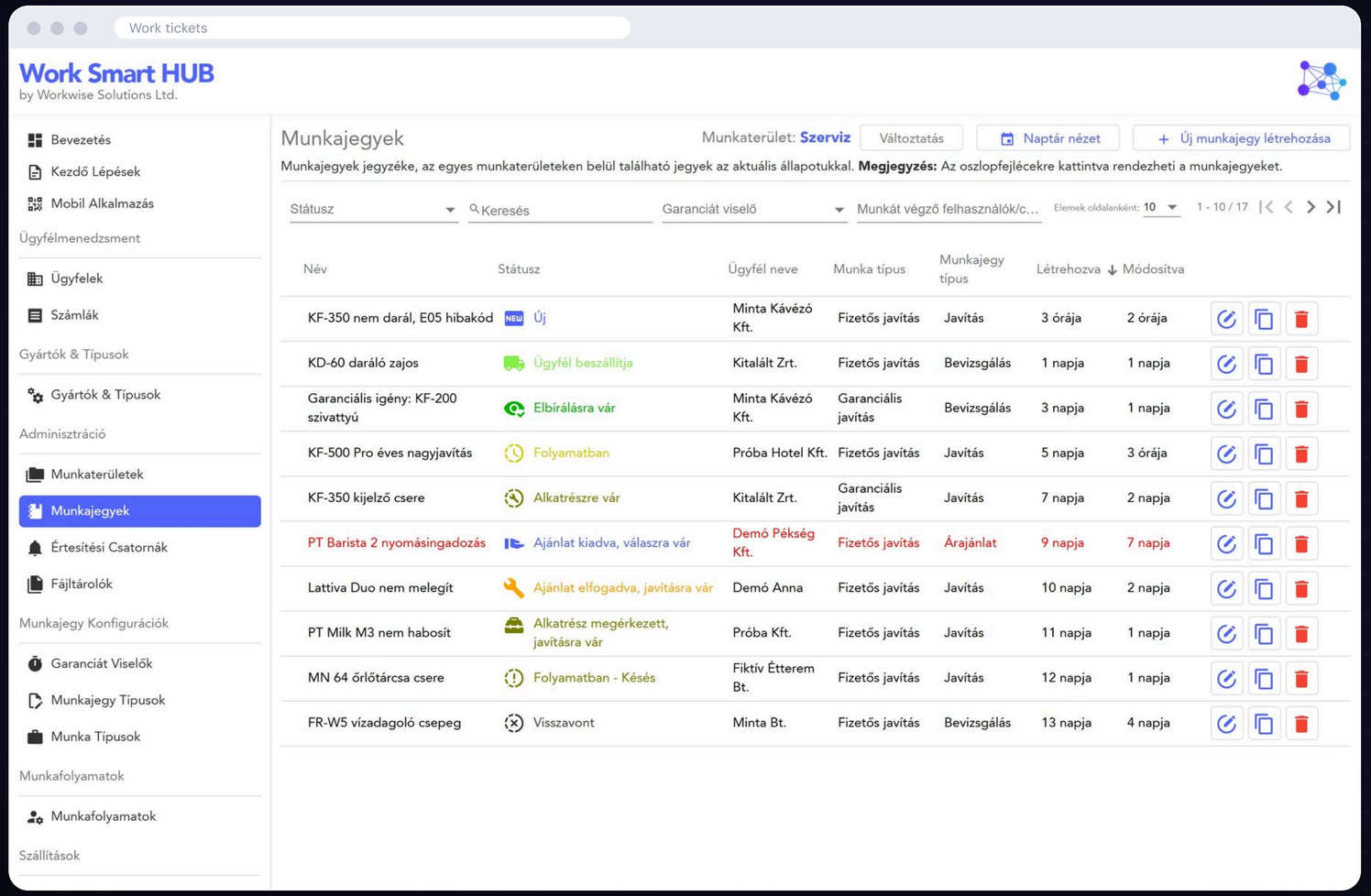
01

Five stops, and what happens by itself at each



Your team records what happened. **The messages, the stock and the invoice follow by themselves.**

The list answers the morning question



1. **Every job of the workspace**
   Name, status, client, type and age, sortable by any column.
2. **Filters that match how you ask**
   By status, guarantor, assigned person or group, or free text.
3. **Stalled jobs turn red**
   No change for the set number of days, and not closed yet.

What is open, who has it, and **what is stuck**: one look.

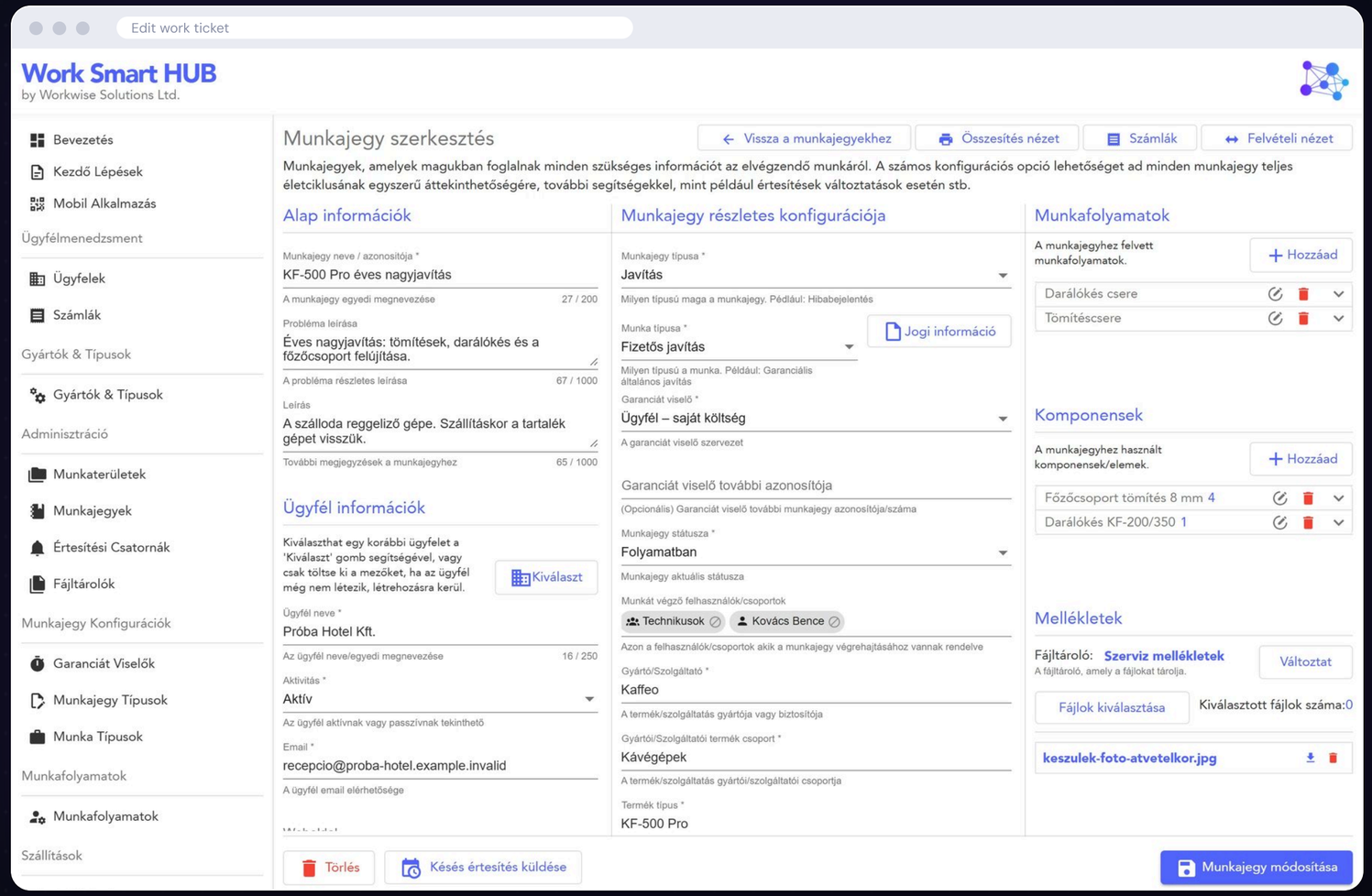
One screen from intake to handover

1. **What the job is**
   Name, problem description, and notes the client never sees.

2. **Who it is for**
   Pick an existing client, or fill in the fields and a new one is created.

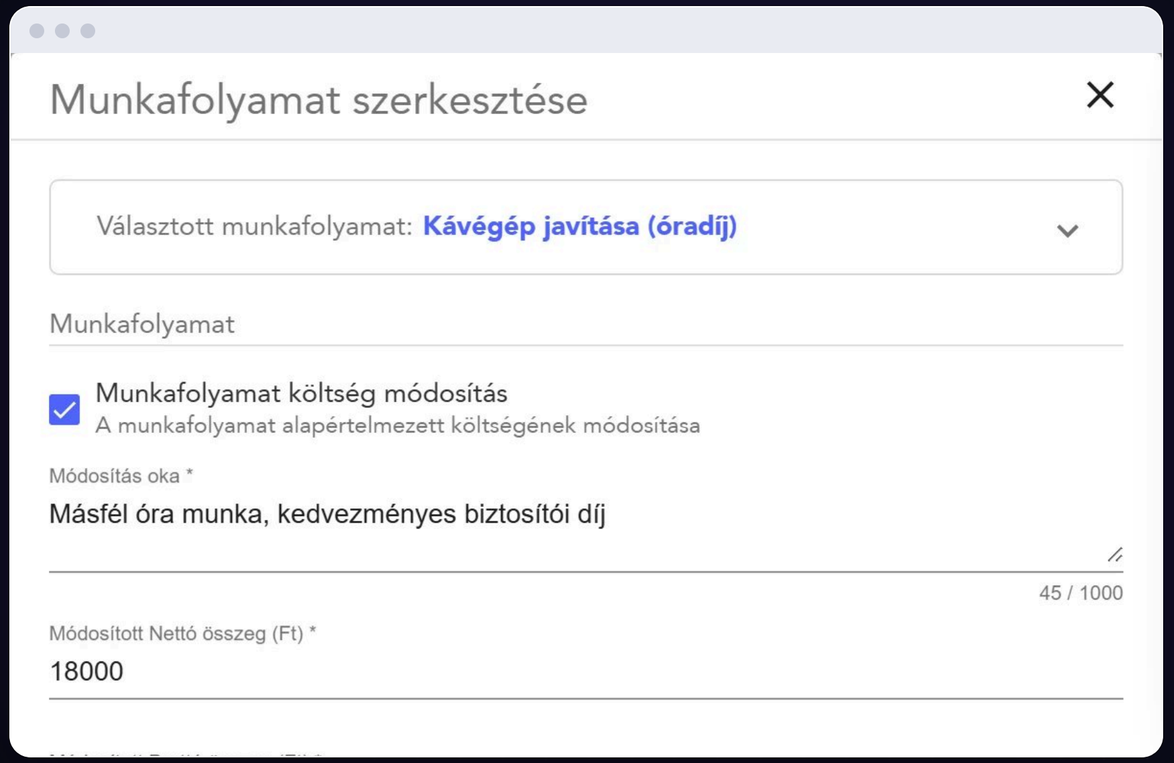
3. **How it is handled**
   Type, guarantor, status, the people assigned and the product.

4. **What it takes**
   Work steps, parts from stock and attachments, on the right.



Print the summary or the intake sheet, send a delay notice, open the invoices: **all from the ticket**.

Work steps and parts carry their prices



A work step from your price list. The price can be overridden for this ticket, with a reason.



A part from stock, with quantity. Adding it takes it out of the warehouse.

Type the net or the gross price: **the other one is calculated**.

A status for every stop on the route

START AND QUOTE

- Új (New)
- Quote issued, waiting for answer
- Quote accepted, waiting for repair
- Quote rejected
- Waiting for review

WORK AND PARTS

- In progress
- In progress, delayed
- Waiting for parts
- Part arrived, waiting for repair
- Commissioning

CLIENT AND DEVICE

- Client brings it in
- Client not reachable
- Replacement: waiting for device
- Replacement: can be handed over
- Debt

FINISH AND DELIVERY

- Done
- To be invoiced (Számlázandó)
- Waiting for delivery
- Being delivered
- Delivered

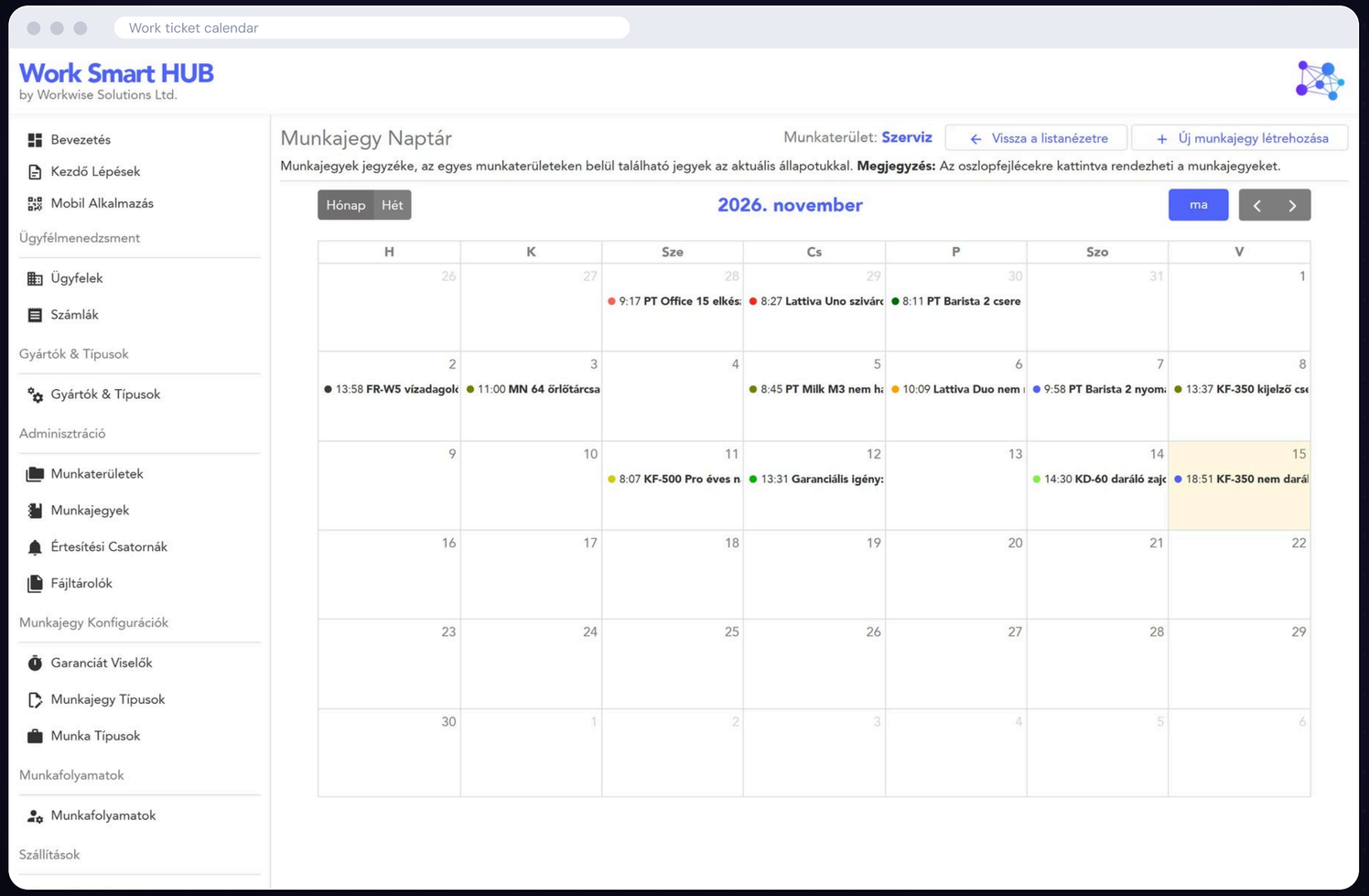
Status changed → the assignees and the workspace admins are notified

To be invoiced → the final invoice can be issued automatically

Being delivered → the client gets the delivery notice

> Plus archived, withdrawn and scrapped for the jobs that end another way. **Closed tickets stop the reminders.**

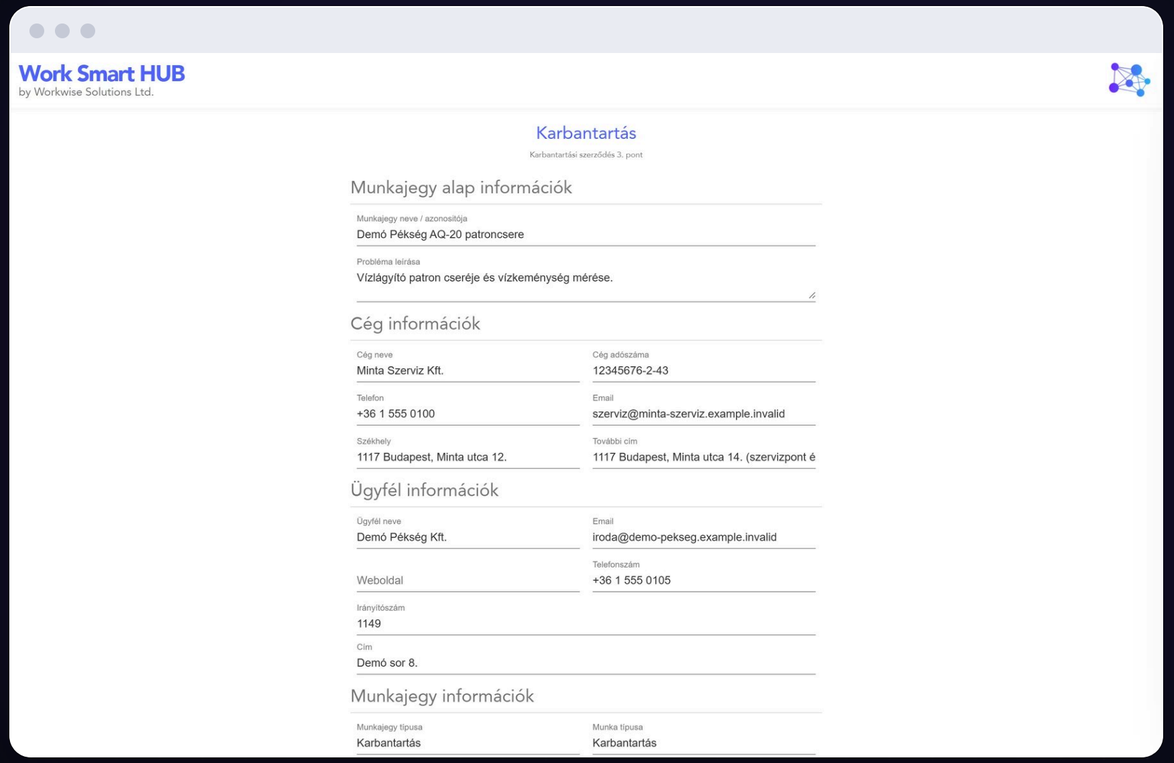
The same jobs, as a calendar



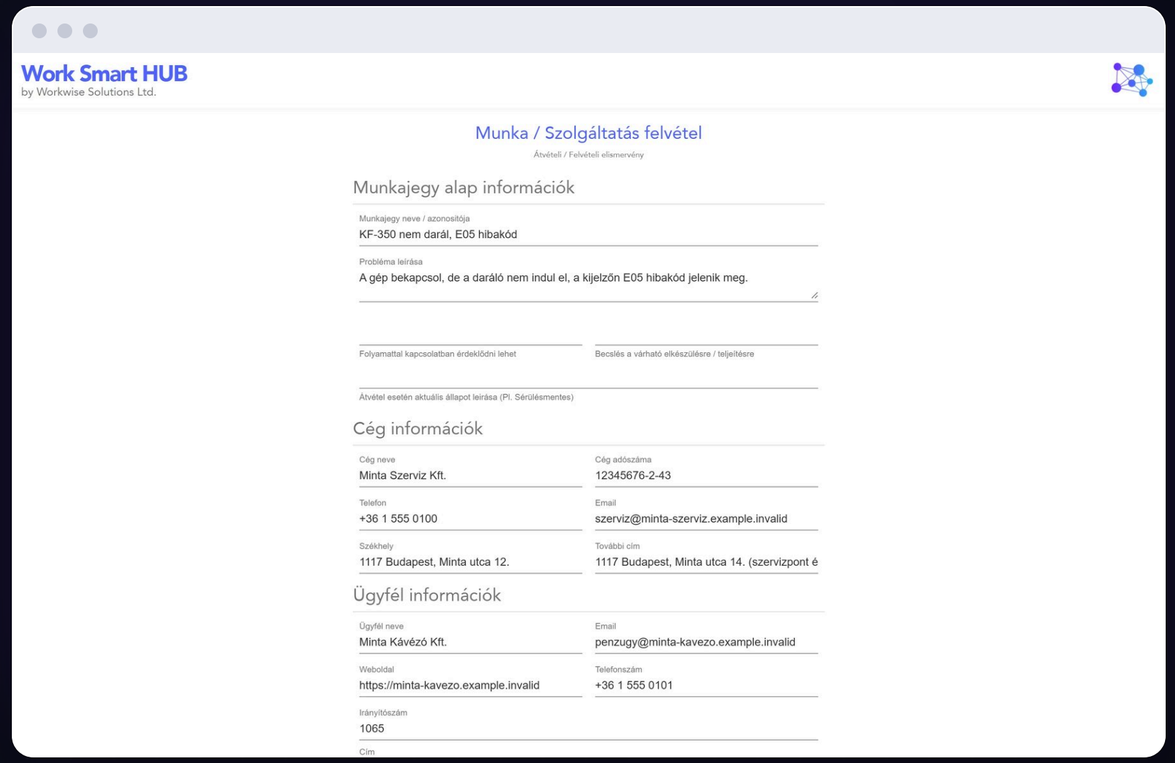
1. **By intake date**
   Month or week view of the workspace.
2. **Coloured by status**
   The dot shows where each job stands.
3. **One click to the ticket**
   Open, check, update, go back.

How busy was the week, and **what came in when**.

Paper when the client needs paper



Summary: client, product, work steps, parts and delivery with net and gross totals.



Intake sheet: what was handed in, in what state, with your terms and a place to sign.

Both carry **your company details and logo**, and are made from the ticket as it is right now.

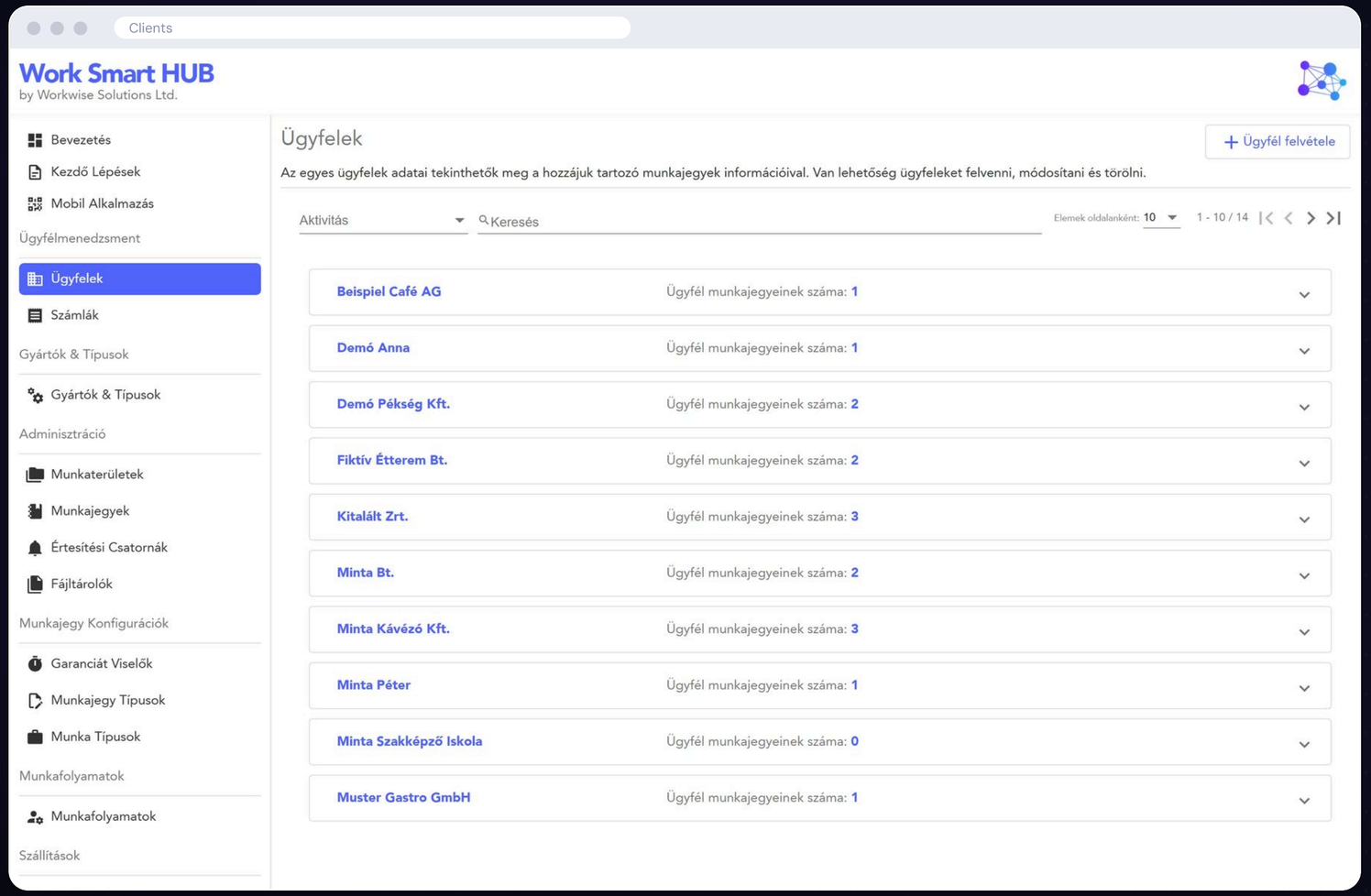
PART 02

Clients and stock

Recorded once, used on every ticket, kept up to date by the work itself.

02

Every client with its whole history



1 One record per client

Companies and private persons, shared by all workspaces.

2 Tickets under the client

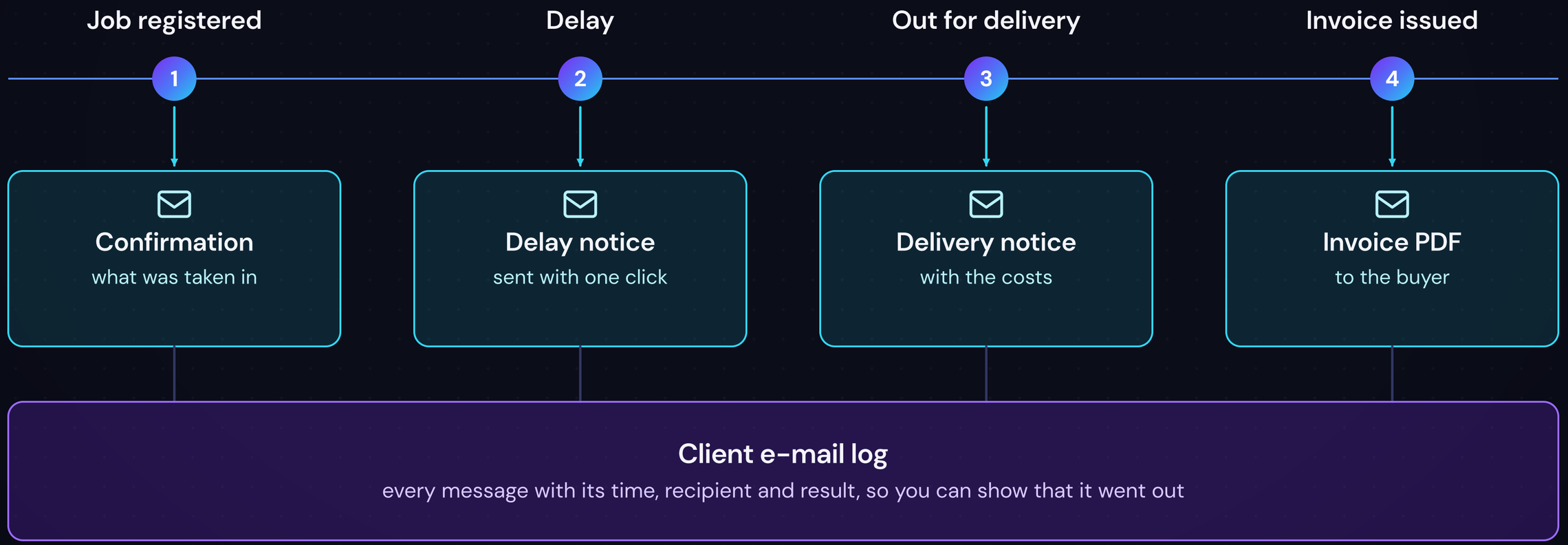
Open a row to see what you did for them, and when.

3 Ready for invoicing

Tax number, country, EU VAT number and invoice language.

When the client calls, **the answer is one search away**.

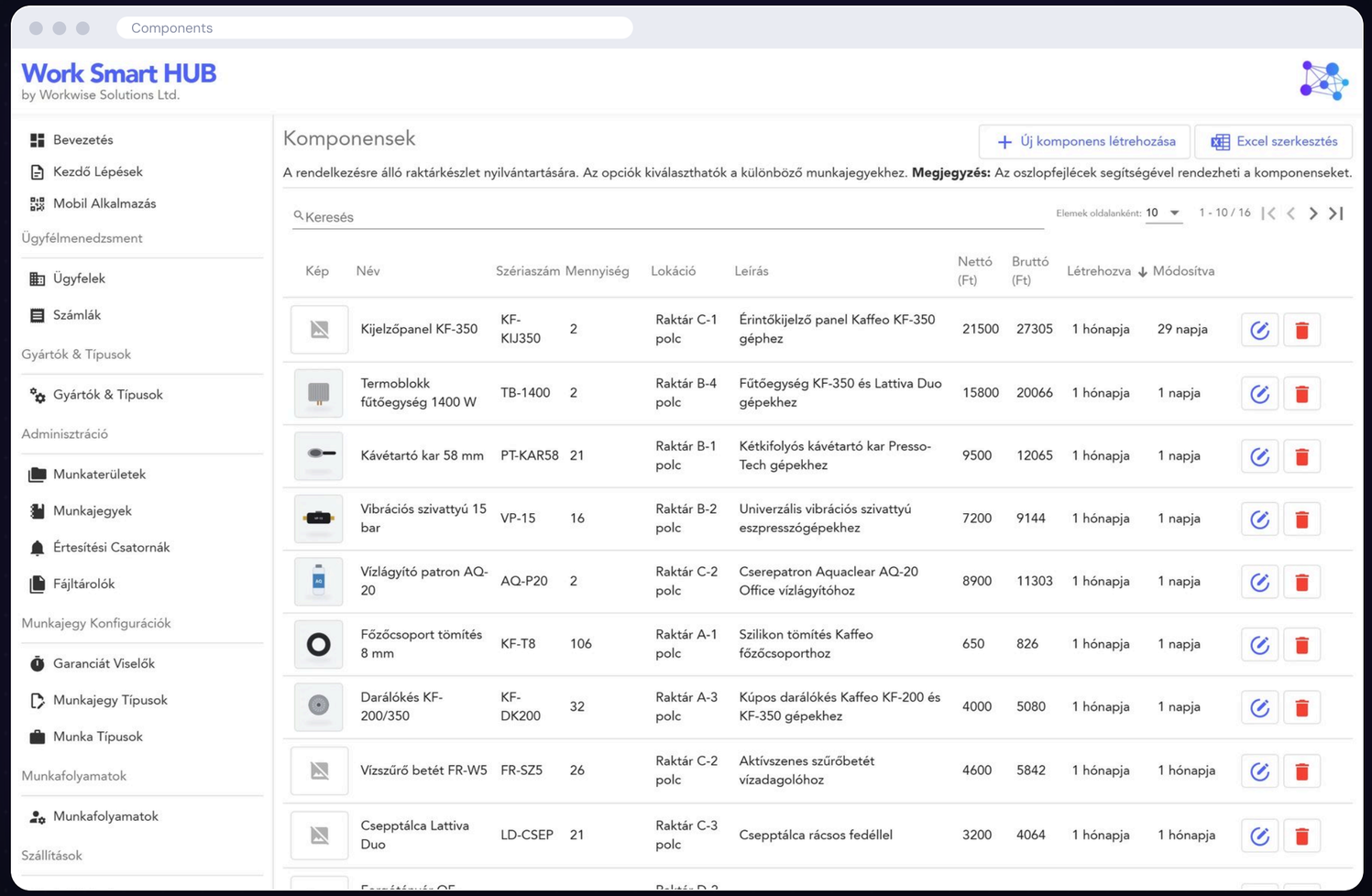
The client hears from you before asking



The texts are templates you edit. **The sending is not something anyone has to remember.**

A warehouse that keeps itself up to date

1. **Every part with its place**
   Serial number, description, location, quantity, price and picture.
2. **Low stock is visible**
   And the people responsible get an e-mail.
3. **Edit in Excel**
   Export, change, import back with validation.



> Nobody has to count after each job: **the tickets do the bookkeeping**.

Stock follows the tickets

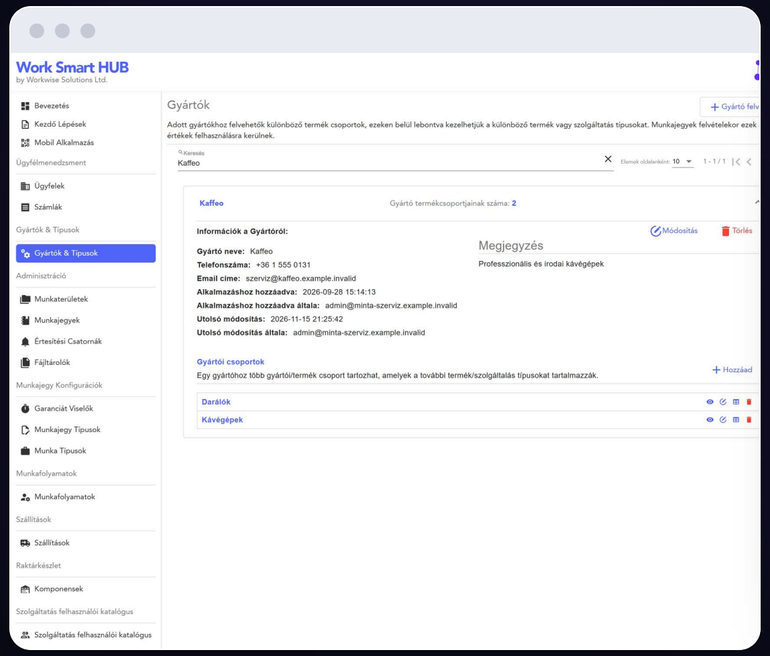


BULK CHANGES IN EXCEL

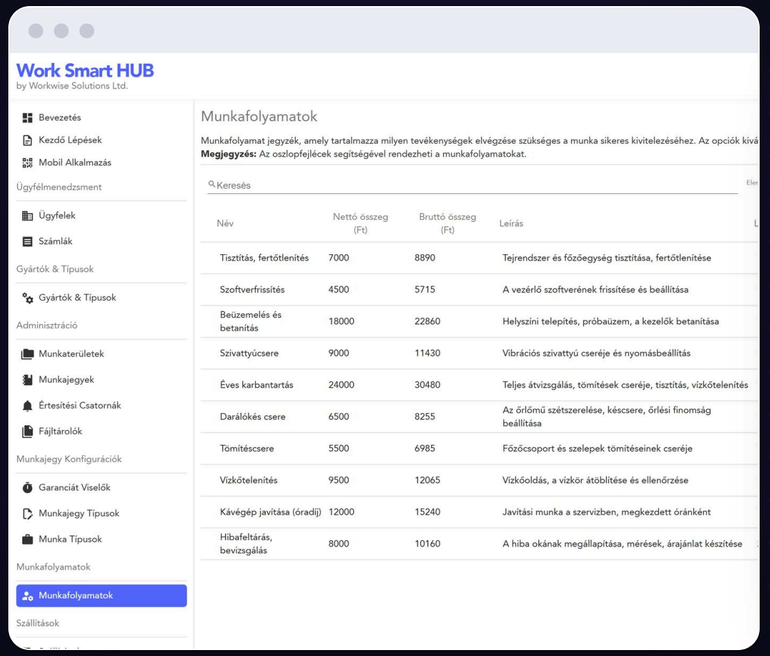


The number on the screen is **the number on the shelf**.

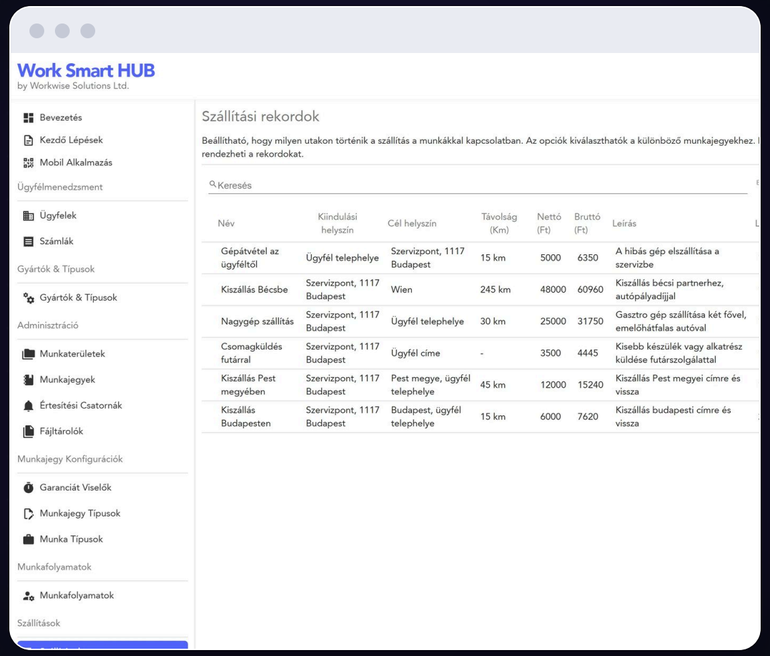
Your catalogue: set up once, picked on every ticket



Manufacturers, product groups and product types



Work steps with default prices



Delivery routes with prices

Guarantors, ticket types and work types complete the picture. **New tickets take seconds, not minutes.**

PART 03

Invoicing with Számlázz.hu

03

The invoice is issued from the ticket, with your own Számlázz.hu account.

From the ticket to the buyer's inbox, in one flow

1. **Ticket lines** — work steps, parts and deliveries
2. **Preview** — lines, VAT breakdown and totals
3. **Számlázz.hu** — issues the document
4. **PDF stored** — in the ticket's file storage
5. **E-mail** — to the buyer, can be re-sent
6. **Payment status** — synced back from Számlázz.hu

No second invoice after a lost answer

A retry first looks the document up at Számlázz.hu, and the background job does the same on its own.

Automatic on a status change

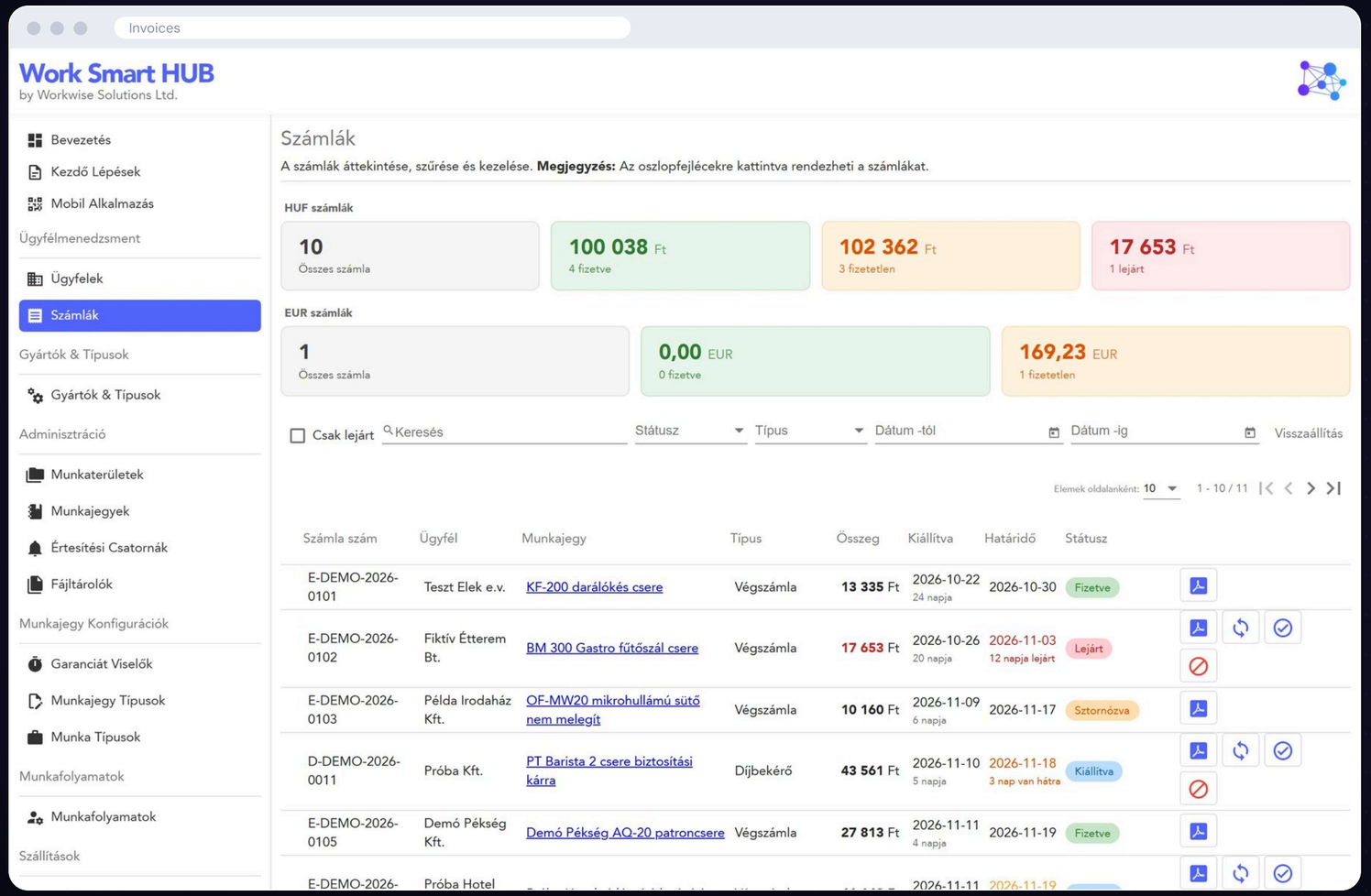
When a ticket administrator sets Számlázandó, the final invoice is issued, at most once per ticket.

A checklist on the ticket shows what is still missing before an invoice can be issued.

Who may issue invoices is a permission: ticket administrators of the workspace.

> Nothing is typed twice: **the invoice lines are the ticket lines.**

Every invoice, and what is still owed

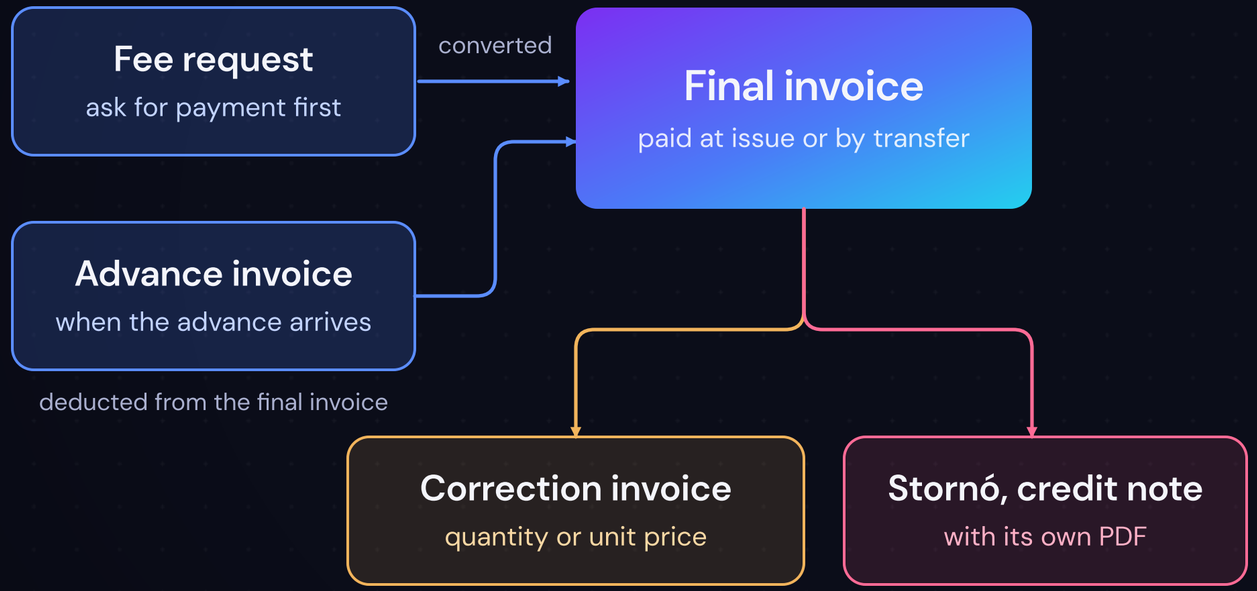


1. **Totals per currency**
   All, paid, unpaid and overdue, for HUF and EUR separately.
2. **Find any document**
   Search, status, type and date filters, overdue only.
3. **Act from the row**
   Open the PDF, sync the status, mark as paid, cancel.
4. **Linked to the ticket**
   One click from the invoice to the job behind it.

Overdue invoices also arrive as a notification, **with the amount still due.**

The documents a real business actually needs

DOCUMENTS AND HOW THEY FOLLOW EACH OTHER



Payment by cash, card or transfer. Delivery of the PDF by Számlázz.hu or by WorkSmartHub's own e-mail.

AT ISSUE YOU CHOOSE

VAT treatment

Domestic · Domestic reverse charge · EU goods · EU services · Export of goods · Services to a third country

Currency, with the exchange rate you enter

HUF · EUR · USD

VAT rate per item

27 % · 18 % · 5 % · 0 % (AAM, TAM)

Buyer

country · EU VAT number · invoice language (11)

Domestic and foreign buyers, forint, euro and dollar: **from the same dialog**.

PART 04

Teams and access

Everyone sees what they need, hears about what concerns them, and signs in the way your company does.

04

Separate teams, separate work, one installation

WORKSPACE

Service

- work tickets
- members and permissions
- notification channels
- file storages

WORKSPACE

Maintenance

- work tickets
- members and permissions
- notification channels
- file storages

WORKSPACE

Installation

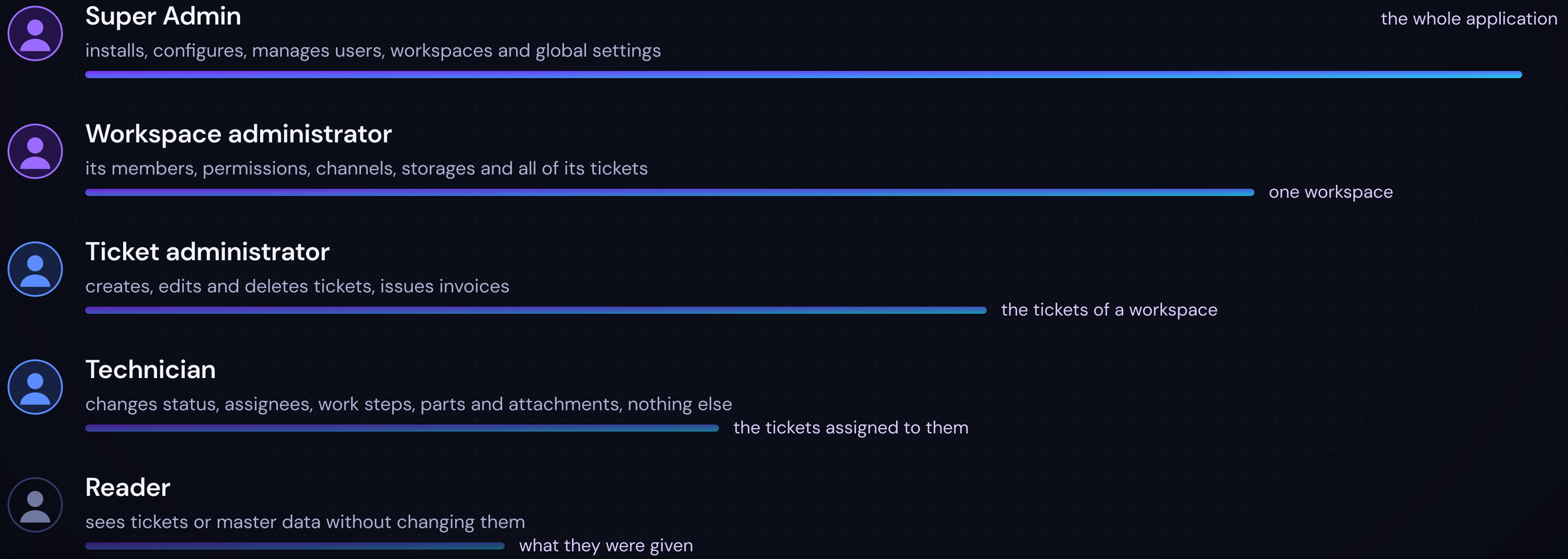
- work tickets
- members and permissions
- notification channels
- file storages

RECORDED ONCE, USED BY EVERY WORKSPACE

- clients
- manufacturers and types
- work steps
- deliveries
- stock
- users and groups

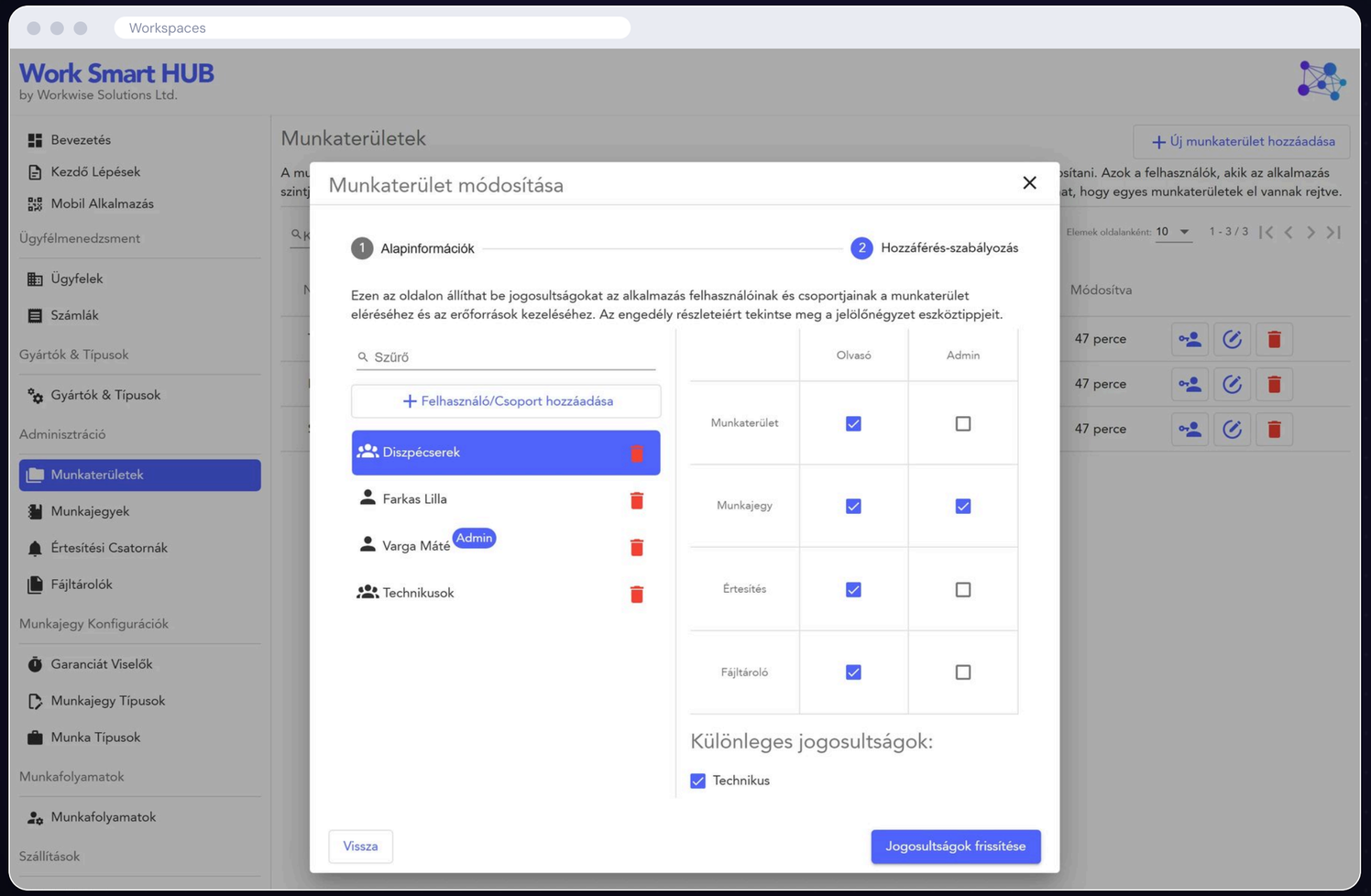
A person can belong to several workspaces and **switch between them with one click**.

Five roles, from everything to just my tickets



Separate permissions let people maintain clients, catalogue or stock without being administrators. **The server checks every request.**

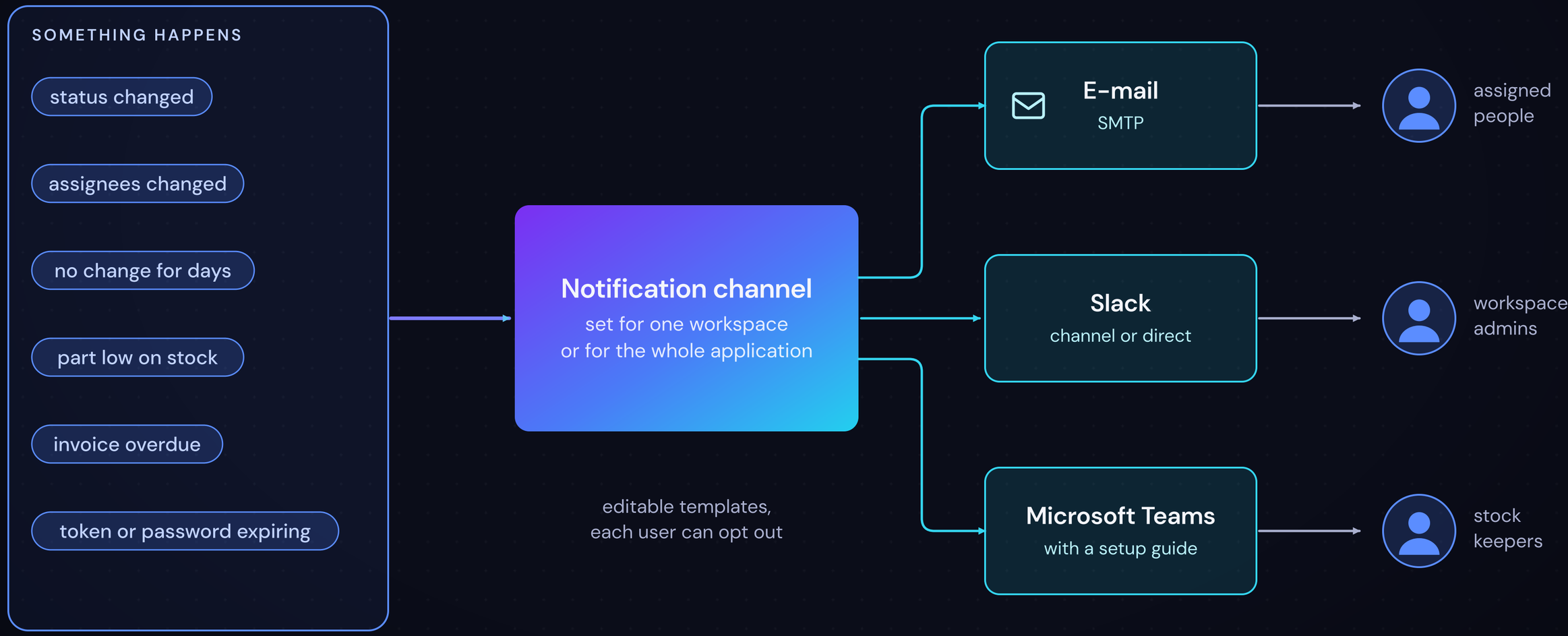
Permissions are given where the work is



1. **Users or whole groups**
   Add a team once, not person by person.
2. **A level per workspace**
   Administrator in one, technician in another.
3. **From your directory**
   Local users or users and groups of your identity provider.

New colleague, new team, new department: **a few clicks, no IT ticket**.

The right people hear about it, where they already are



A ticket picks its channels. **Nobody has to forward anything.**

Sign in the way your company does



No second password to remember, and **a leaver loses access when the directory says so**.

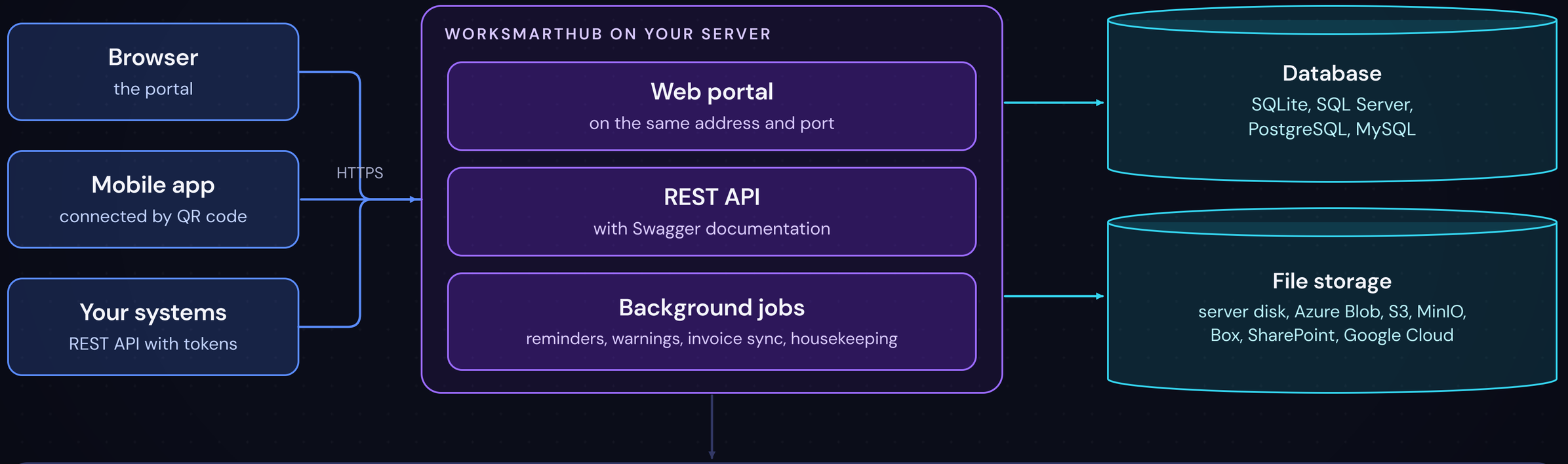
PART 05

On your infrastructure

You install it, you run it, and your data stays in your network.

05

One application, and everything else is your choice



CONNECTED WHEN YOU SWITCH THEM ON

SMTP server · Slack · Microsoft Teams · Identity provider · Számlázz.hu · HashiCorp Vault

Nothing is stored at WorkWise Solutions: **the database, the files and the sign-in are yours.**

Runs where your other systems run

INSTALLATION

Windows Server

A site under IIS, with Windows sign-in if you use Active Directory.

IIS

INSTALLATION

Linux

A systemd service behind nginx on Ubuntu, Debian or the RHEL family.

systemd nginx

INSTALLATION

Docker

One container and one data volume, with run and service scripts.

one volume

INSTALLATION

Kubernetes

A Helm chart with a built-in PostgreSQL and Redis, or your own.

Helm

START

Start small

The default SQLite database needs no database server. One machine is enough.

GROWTH

Grow when needed

SQL Server, PostgreSQL or MySQL, and several servers behind a load balancer.

UPGRADE

Upgrades without surprises

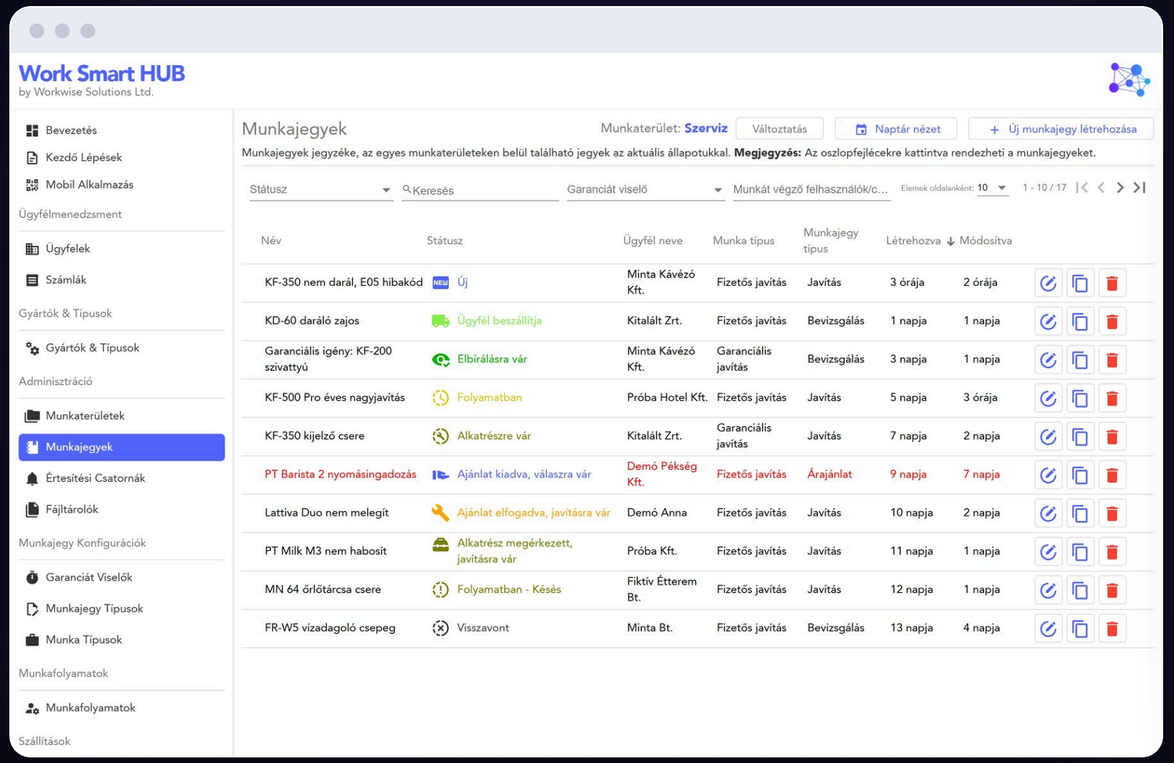
The schema is migrated at start-up, and each release lists what to do.

GUIDES

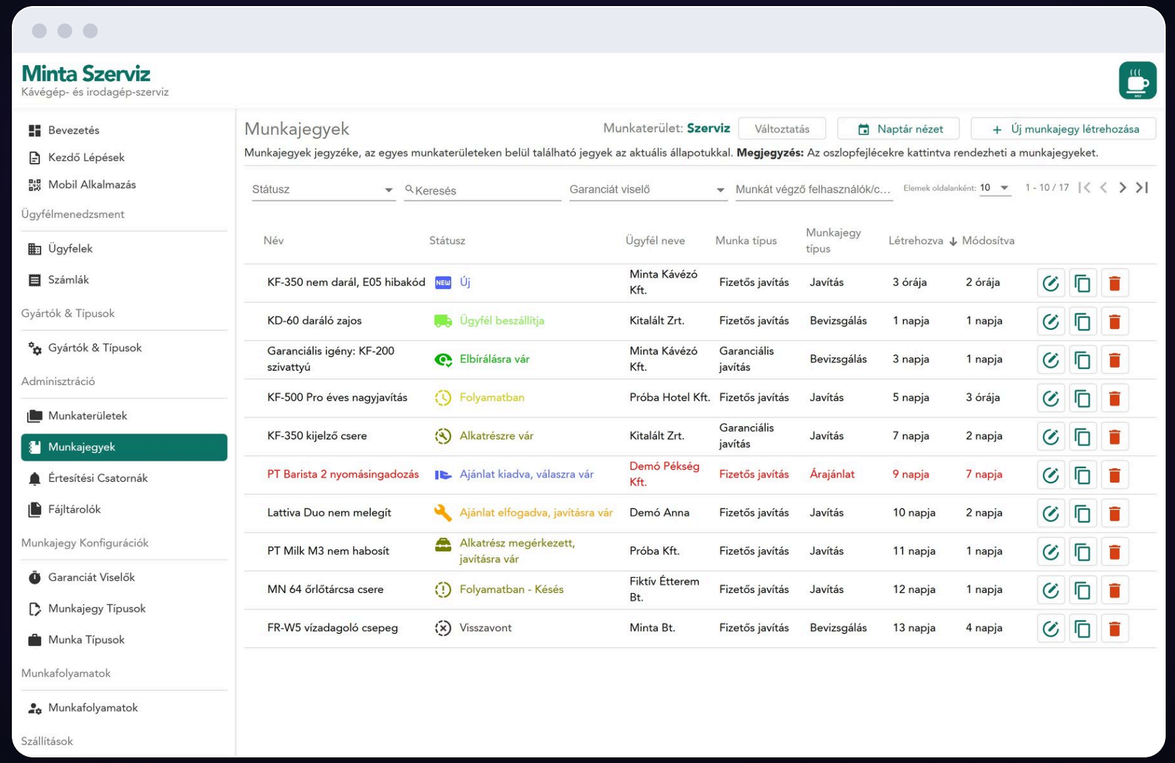
Documented step by step

Requirements, each installation, backup, restore and production operation.

It looks like your own tool



The default look

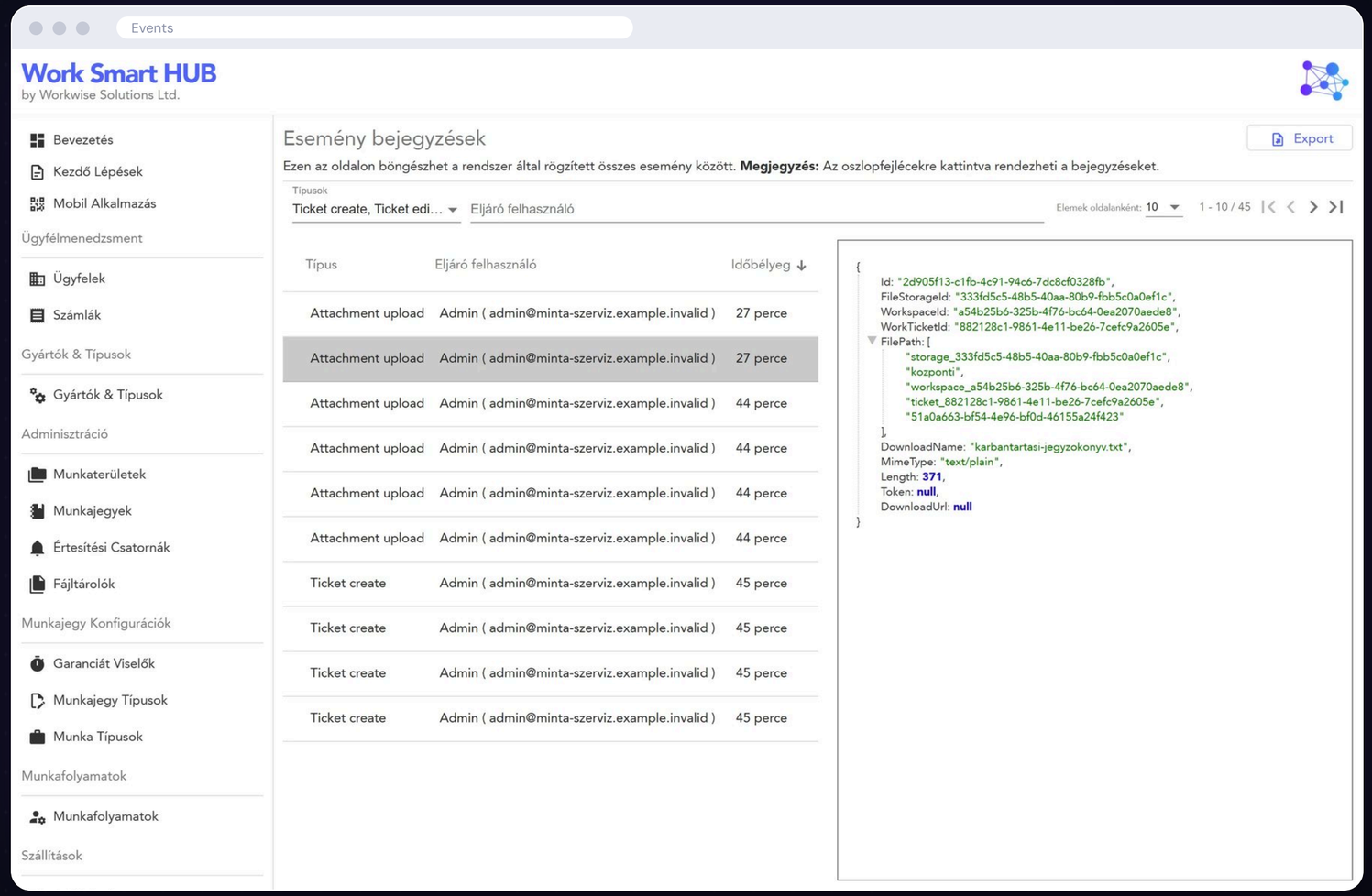


The same page with a company logo and colour

Logo, colours, company details on e-mails, printouts and invoices: **set in the portal, no development**.

Who did what, and when: always on record

1. **Every action is an event**
   With the user, the time and what changed.
2. **Errors have their own list**
   And the server log files open in the portal.
3. **Filter and export**
   By user and event type, to Excel.
4. **Secrets stay secret**
   Settings changes are logged, keys and passwords never.



When a question comes up months later, **the answer is in the log**.

Works with what you already have

Invoicing

- Számlázz.hu

Notifications

- E-mail (SMTP)
- Slack
- Microsoft Teams

Sign-in and users

- Active Directory
- LDAP
- Microsoft Entra ID
- OAuth 2.0

File storage

- Server disk
- Azure Blob
- Amazon S3
- MinIO
- Box
- SharePoint
- Google Cloud Storage

Database

- SQLite
- SQL Server
- PostgreSQL
- MySQL

Automation and secrets

- REST API
- Swagger
- Personal access tokens
- HashiCorp Vault

You choose them in the settings, **and you can change them later**.

Up and running in three steps

1

Install

on Windows, Linux,
Docker or Kubernetes

upload the licence
create the first administrator

2

Configure

company details,
workspaces, permissions

catalogue, clients, stock
channels and file storages

3

Work

take in jobs as tickets,
assign and follow them

print, notify, invoice
from the ticket

The documentation covers every step, with screenshots and diagrams

workwise-solutions.net/docs

We help with the installation and the first settings, **then your team takes over**.

24 releases since 2023, and counting



Every release is documented, with what is new and what an administrator has to do: workwise-solutions.net/changelog

Driven by what customers ask for. **The newest: foreign buyers, euro and dollar invoices, corrections and advances.**

SEE IT WITH YOUR OWN DATA

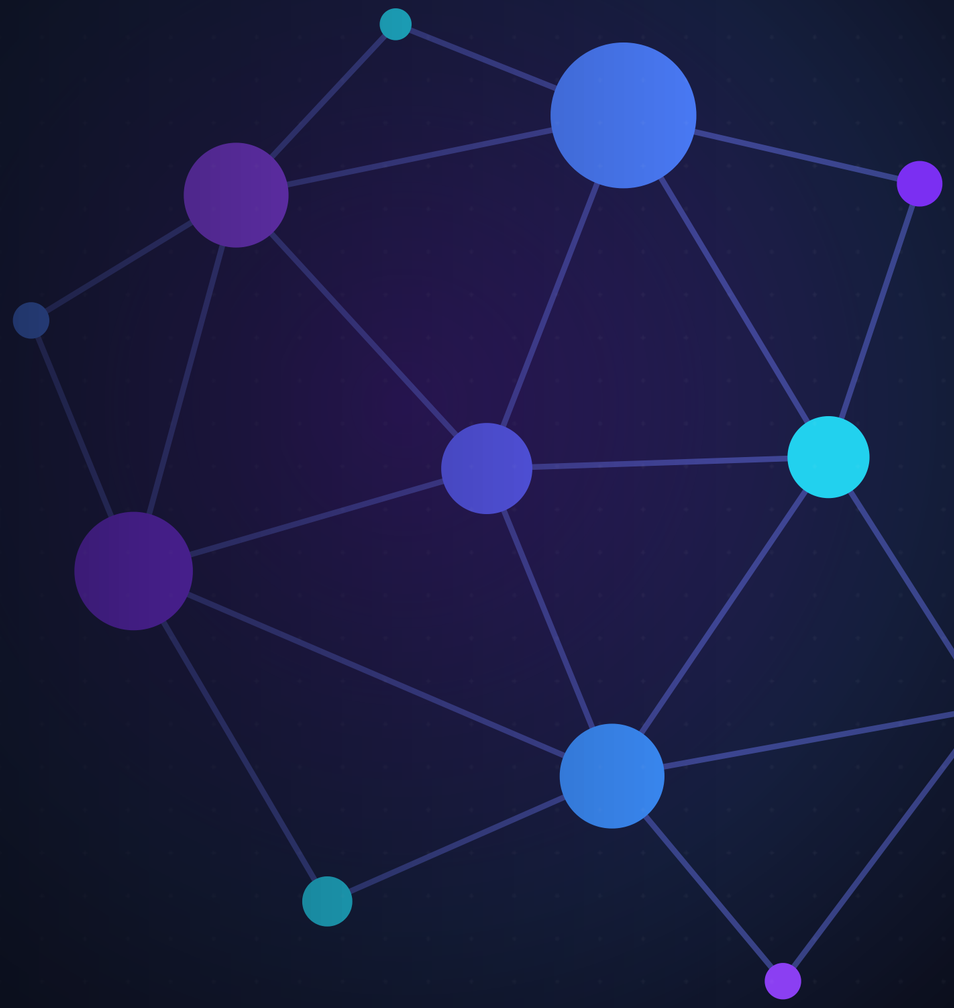
Let's build the future together

Simplify the boring part of work, and focus on what you are good at. Book a free demo and we walk you through the product with your own questions.

E-mail info@workwise-solutions.net

Demo calendly.com/workwise-laszlo-nemes

Docs workwise-solutions.net/docs



WorkWise Solutions

SIMPLIFY THE BORING PART OF WORK