



Helpful Links & Resources

Here are some useful links to help you get the most out of Jimbo:

Video Guides:

- **Jimbo Walkthrough playlist**

<https://www.youtube.com/playlist?list=PLZLlOfY2ia2sqzty6dy3Y0bHQPffvko03>

Frequently Asked Questions (FAQs):

- **General FAQs:**

<https://jimbo.jims.net/> navigate to FAQ's

Getting Started with the Jimbo App

Here are the steps to help you set yourself up on the new **Jimbo App**.

Preflight Checklist

Step 1:

Make sure your phone battery is at least **20%** and you're connected to **Wi-Fi** or have **mobile data** enabled.

Step 2:

Have access to a **laptop or computer** connected to Wi-Fi — you'll need it during setup.

Let's Begin

Step 1: Open the Jimbo Website

On your **mobile phone**, open your browser and search "**Jimbo by Jim's**" on Google. Click the **first result** – this will take you to the official Jimbo website:

 <https://jimbo.jims.net>

Step 2: Download the Jimbo App

From the homepage, tap the links to **download and install** the latest version of Jimbo. Make sure to **grant the required permissions** when prompted.

Once installed, the white app icon will appear on your phone, example below.



Step 3: Reset Your Password (First-Time Only)

If this is your **first time signing in**, tap on **“Forgot Password”** and follow the on-screen steps to set a new one.

✓ This password will also work for **Jim’s Online**.

Your **username is your Franchisee Code**.

Step 4: Log In

Use your **Franchisee Code** and newly created password to log in.

If prompted, enter the **6-digit verification code** sent via SMS.

Step 5: Update Your Settings

Tap **“Home”** at the bottom of the app, then go to **Settings**.

Step 6: Banking Details

Settings > Bank

Tap on **Bank**, then tap the  **pencil icon** (top right) to view or update your bank details.

Step 7: Business Preferences

Settings > Business

Tap the  **pencil icon** to select or unselect options based on your business preferences.

Remember to **tap Save** when done.

Step 8: Review Terms and Conditions

On a laptop or computer:

1. Go to the Jimbo website: <https://jimbo.jims.net>
(Tip: You can also Google “Jimbo by Jim’s” and click on the first result.)
 2. Click the **Web Login** button and sign in using your existing credentials.
 3. From the left-hand menu, click on **Terms and Conditions**.
 4. Review the content and make any changes as required.
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Step 9: Review Templates

Still on a laptop or computer:

1. From the left-hand menu, click on **Templates**
 2. Review the content and make any changes as required
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Step 10: On Mobile > Managing Leads

Tap **Leads** from the bottom menu.

Set the filter to “**Uncontacted**” to view all new leads.



Pull down to refresh the list.

Tap on a lead to view details.



Swipe right to mark the lead as contacted once you've followed up.

(Optional) Step 11: Profile Picture

Settings > Profile

Tap the  **pencil icon** to upload a profile photo (only visible to you).

You can choose a photo from your phone's gallery.

(Optional) Step 10: Dashboard Customisation

Go to your **Dashboard** and select or unselect info cards to suit your preferences.



Frequently Asked Questions (FAQs):

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Does Jim's Jobs talk to Jimbo (and vice versa) in real time?

Short answer: No.

Why?

Jim's Jobs and Jimbo are built on completely different technologies. Jimbo uses a more modern microservices-based architecture, which is also different at a database level.

This means actions taken in one system (e.g., creating a quote or invoice) will not reflect in the other. For example, if you create a quote in Jim's Jobs, Jimbo won't know — and vice versa.

For this reason, we recommend using **Jimbo exclusively** for all new leads and ongoing job management.

When I contact a client via phone, how will Jimbo know?

Jimbo prioritises your privacy. That means calls, texts, or emails made from outside the app aren't automatically tracked.

After contacting a client, simply tap into their profile and **slide the toggle** to mark them as "Contacted." This helps the system (and your franchisor) know you've followed up.

My franchisor received an email saying I didn't contact a lead within 2 hours

Yes — this is a feature built into Jimbo to ensure prompt lead follow-up.

If a lead isn't marked as "Contacted" within 2 hours of coming in, Jimbo will automatically notify your franchisor.

We recommend marking the lead as contacted **as soon as you reach out** — even if the contact is via call, SMS, email, or face-to-face.

How do I update the email and SMS templates sent to clients?

You can customise your communication templates directly from the **Jimbo Web Portal**.

1. Visit <https://jimbo.jims.net>
2. Click "Web Login"

3. Navigate to the **Templates** section and make your edits

Note: Some divisions may have restricted access to this feature depending on settings controlled by Jim's Group National Office.

How will I know if a new version of the app is available?

Jimbo app updates come in two types:

- **Major releases**, which have names like *Jimbo – Chia* or *Jimbo – Strawberry*
- **Minor releases**, shown as version numbers like *Jimbo – Almond v1.04*

To check for the latest version or to update the app:

Go to <https://jimbo.jims.net> and tap **Download App** at the top of the page.

I received a call centre lead from a previous client (Pick-Up Lead), but I can't see it in Jimbo?

This feature is currently being developed in **FMS4** and the upcoming **FMS6** systems.

Once it's rolled out, Jimbo will be able to automatically extract **Pick-Up Leads** from both **FMS4** and **FMS6**. For now, these leads may not appear in Jimbo until the integration is complete.

I created a Pick-Up Lead in Jim's Online, but it's not showing in Jimbo?

This is a feature also being developed in **Jim's Online**. Jimbo will soon be able to extract Pick-Up Leads created in Jim's Online, but this functionality is still under development.

 **In the meantime**, we recommend manually uploading any **Pick-Up Leads** directly into Jimbo to ensure they appear in your client list.

Can I transfer data across to Jimbo from Jim's Jobs?

Yes! 😊 At this stage, we're starting with transferring **Only** Client Lists from Jim's Jobs into Jimbo. The reason we're starting here is because Jim's Jobs and Jimbo are built on completely different systems. Jimbo runs on a newer, modern microservices-based architecture, and the data from Jim's Jobs isn't structured in a way that can be directly transferred without causing issues — especially for things like quotes, jobs and invoices.

That's why we're doing this in stages, beginning with the cleanest and most critical data — your Client List.

Jim's Jobs and Jimbo will continue to run side by side for a few months, giving you time to compare, cross-check, and ease into the new platform.

👉 To get started, just head to the Data Transfer section on the [Jimbo website](#). The ETA for this activity is within a few months.

? How do I check if there's an update available for Jimbo?

To make sure you're using the latest version of Jimbo, visit <https://jimbo.jims.net>.

Once you're on the page:

1. Tap on **Download on iOS** if you're using an iPhone or **Download on Android** if you're on a Samsung or other Android device.
2. This will take you directly to the App Store or Google Play.
3. If an update is available, you'll see an **Update** button — simply tap it.

Keeping your app up to date ensures you have access to the latest features and improvements!

? What are the recommended iPhone Settings for the Jimbo App?

⚠ Important:

While the settings below are recommended for the best experience with Jimbo, your iPhone's **privacy preferences and system settings will always take priority** over the app. Please review and adjust these settings based on your **personal needs and comfort level**.

📱 How to Find Jimbo Settings on iPhone

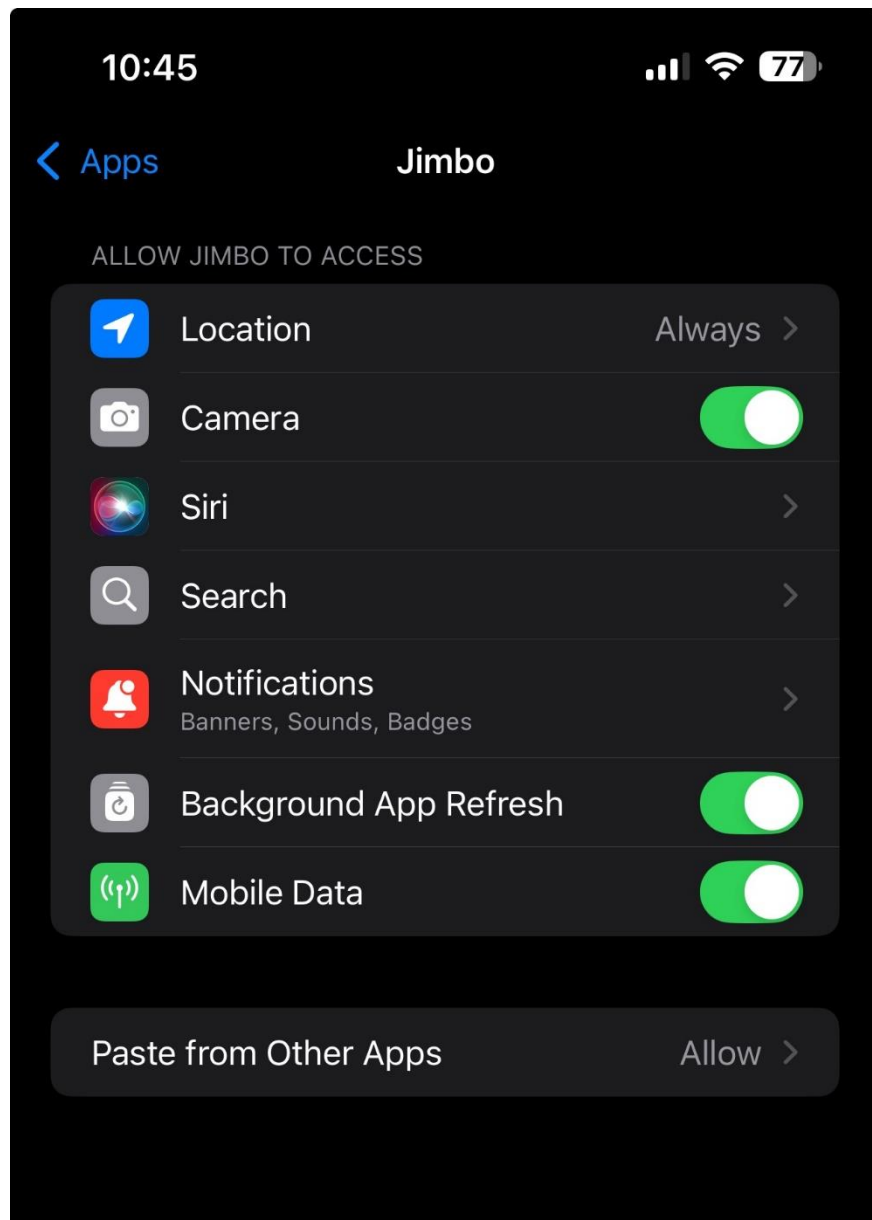
Go to:

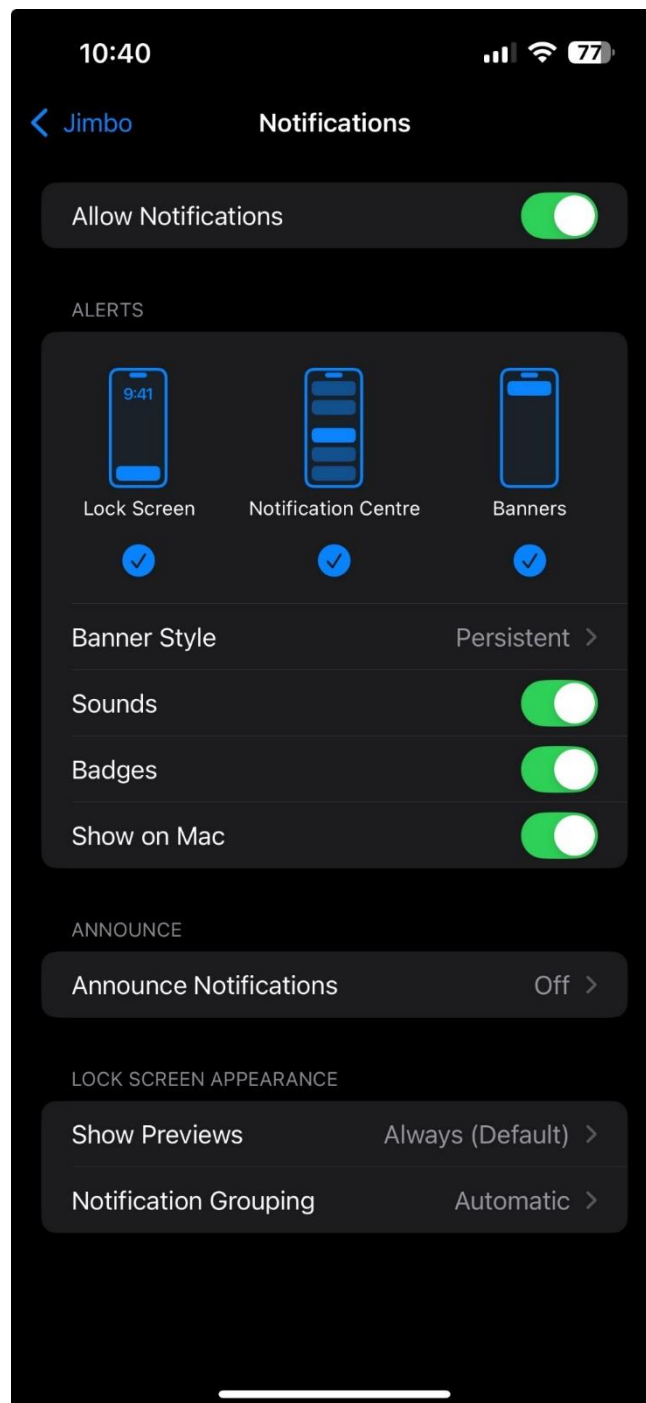
Settings > Search for **Jimbo**

Then tap on **Jimbo white coloured icon**) and adjust the following:

- **Location:** Set as per your personal preference
- **Camera: On** (Allows you to upload photos and documents)
- **Siri & Search:**

- **Siri:** Toggle **On** (for future voice assistant features)
- **Search:** Toggle **On** (to find Jimbo quickly)
- **Notifications:**
 - Tap **Notifications**
 - Toggle **Allow Notifications On**
 - Enable all options as per the screenshot (if provided)
- **Background App Refresh:** On
- **Mobile Data:** On



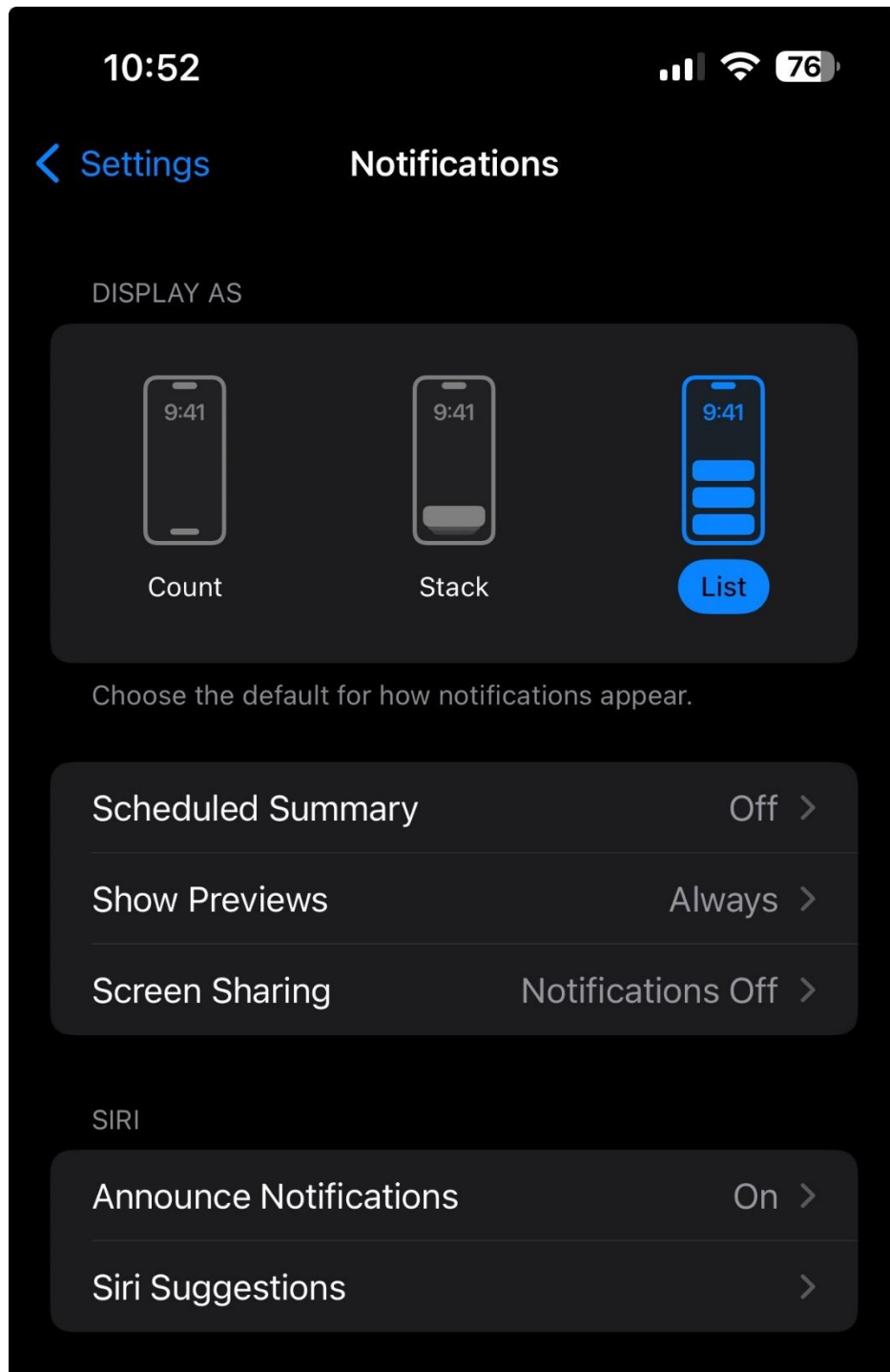


Global Notification Settings (Applies to All Apps)

Go to:

Settings > Search for **Notifications**

- Tap **Notifications** and select **List** view
- **Scheduled Summary: Off** (*or as per your preference*)
- **Show Previews: Always**
- **Screen Sharing:** Set **Notifications to Off** to prevent interruptions during sharing



? Can I see multiple dots on the calendar if I have more than one job booked in a day?

Currently, the Jimbo calendar shows a **single dot under each date** to indicate that there is at least one job scheduled for that day.

We explored the option of displaying multiple dots but made the decision based on a few key factors:

- **Screen size limitations:** Displaying several dots can become cluttered, especially on smaller phone screens used by many of our franchisees.
- **Accessibility:** A single, high-contrast dot is easier to see for users with colour perception challenges.
- **Industry standards:** Leading apps like Apple Calendar and Google Calendar use a similar single-dot system for clarity and simplicity.

That said, we're always looking to improve — and enhancements to how the calendar displays scheduled jobs are on our radar for future updates.

? I am unable to edit the details in my business details

Currently we do not have the ability to alter your business details via the app as it pertains to your franchise agreement along with your settings in Jim's Online. To request for a change in your business details, please email documents@jims.net along with the details that you would like to change, they will then verify your details and advise the necessary steps to get this done for you.

? How Do I Create a Recurring Job in Jimbo?

A: Follow these steps to create a job that repeats automatically:

1. Start a New Job

- Tap **Book Job** from your leads or quotes or clients screen /
- or **New Job** by clicking on the Plus Icon on the top of your screen

2. Select a date

- Click on the date as per your availability and then Click **Add Details**

3. Provide Details

- Provide Title of the Job
- Select Type of the Job
- Chose Client if not already prefilled
- Enter amount if not already filled
- Select Date of the Job

4. Set the Start and End Times

- Choose when the job will **Start** and **End**.
- You can also toggle **All-day** or **Anytime** if the job isn't tied to a specific time.

5. Choose the Repeat Frequency

- In the **Repeat** field, tap and select how often you want the job to repeat (e.g., *Every Week, Every Fortnight*).

6. Select End Repeat and End Date

- Under **End Repeat**, pick **On Date**.
- In the **End Date** field that appears, tap to choose the final date this job will repeat until.

Note: An **End Date** is required for all recurring jobs.

7. Set Alerts and Reminders (Optional)

- Use **FSE Alert** and **Client Reminder** to choose when notifications are sent.

8. Add Job Notes (Optional)

- Enter any extra details about the job in the **Job Notes** field.

9. Save the Job

- Tap **Add** or **Book Job** at the top right to save your recurring job.
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Q: Can I edit a recurring job later?

A: Yes. Just open the job, make your changes, and save. The updates will apply to all future occurrences, or you can make the change for that one job only

Q: What happens if I don't select an End Date?

A: You won't be able to save the recurring job. The app will prompt you with an error message. Also included in a future release to make the end date as default to 2 years with a notification advising you of upcoming end date.

Q: Can I set different reminders for each occurrence?

A: No, the reminders you choose will apply to all repeats in the series.

Q: Can I stop a recurring job early?

A: Yes. Edit the job and change the **End Date** to an earlier date or delete the job entirely if needed.

? I have two franchises with two franchise codes. Can I log in to Jimbo with both IDs at the same time?

At this stage, Jimbo doesn't support logging in with multiple franchise codes simultaneously.

If you manage more than one franchise, you'll need to log out of one account and log in to the other when you want to switch between them.

- To log out on the app:
Tap Settings, then scroll to the bottom and select Sign Out.
- To log out on the web:
Click your name in the bottom left corner of the screen.

We understand this can be a bit of extra work, and longer-term we're exploring ways to make managing multiple codes simpler.

