



Welcome to Jim's Group

Here are some useful links and resources to help you get the most out of Jimbo.

Please note: This list is not exhaustive and is intended as a general guide only. For a complete and up-to-date list of features, functions, and the latest updates, always refer to the official Jimbo website: <https://jimbo.jims.net/>

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.
-

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
-


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):

- **General FAQs:**

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

✗ 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**.

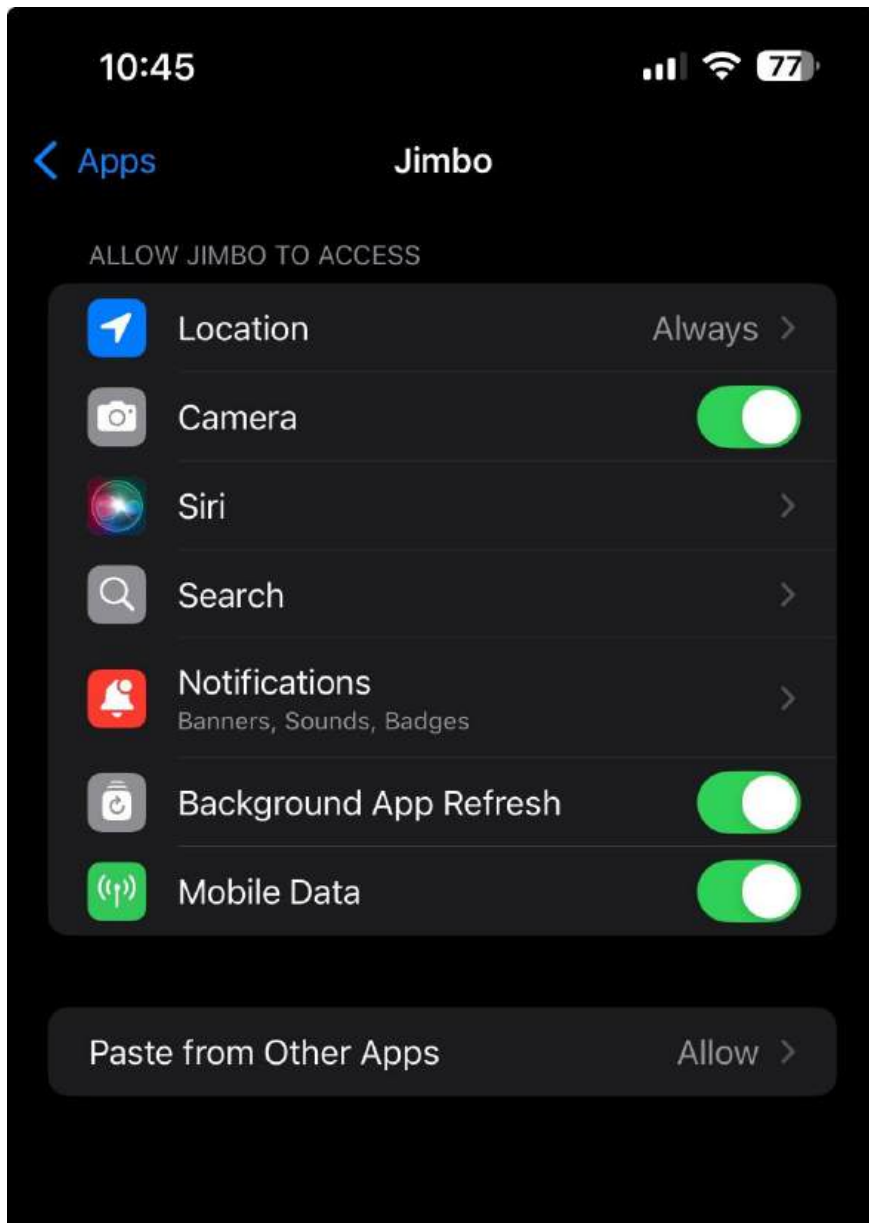
How to Find Jimbo Settings on iPhone

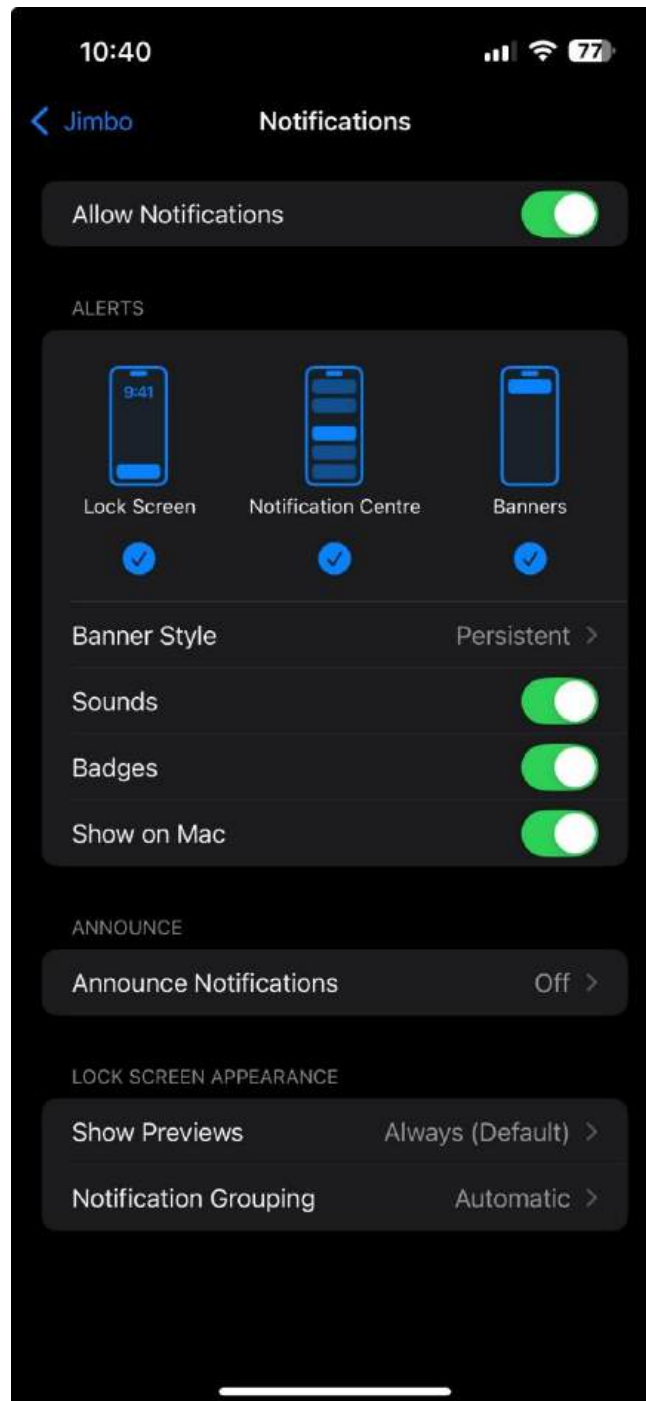
Go to:

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**



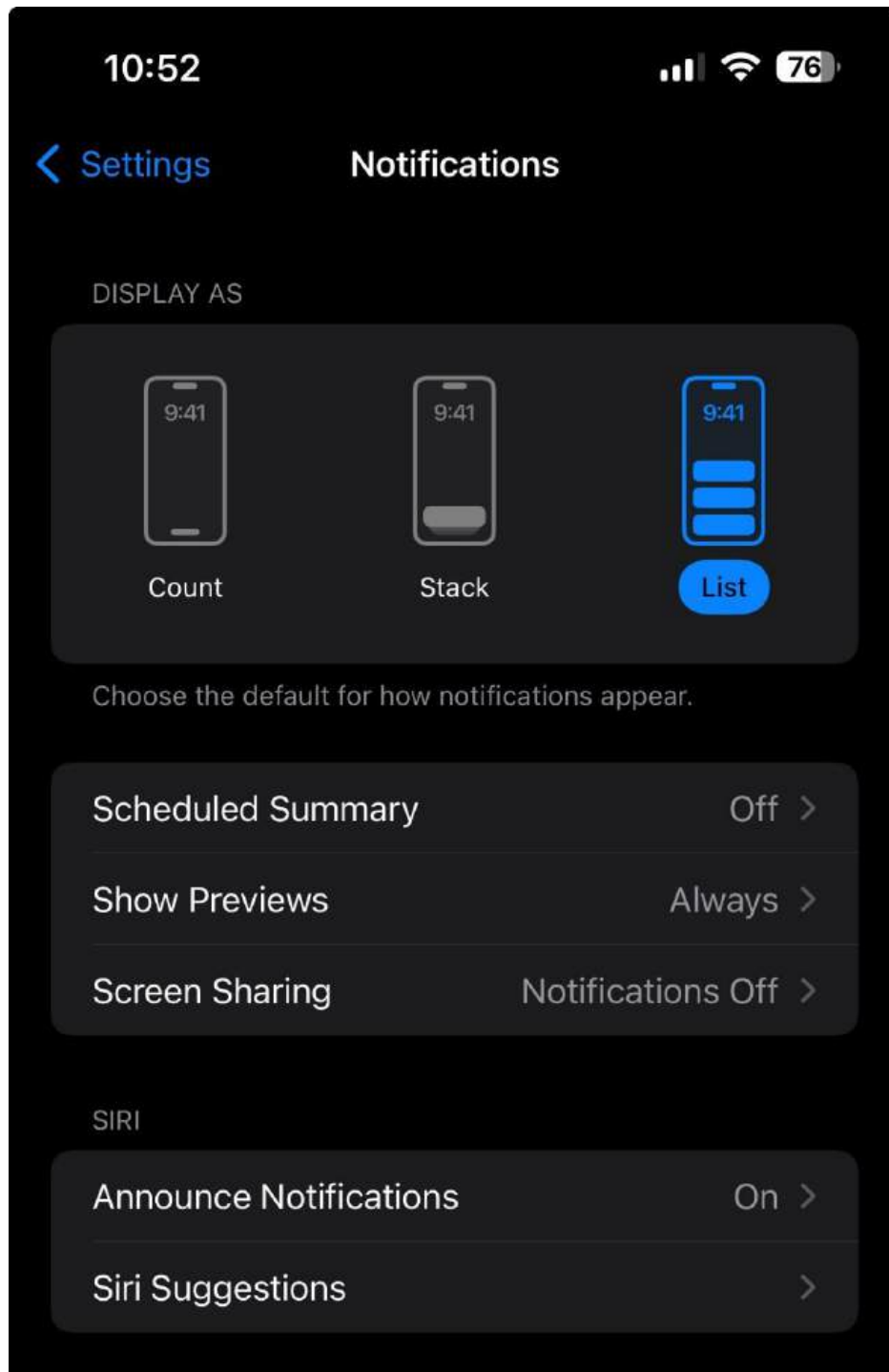


🔔 Global Notification Settings (Applies to All Apps)

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.
-

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.

Steps for Xero Integration

Step#1: Go to web login : <https://jimbo.jims.net/>

The image shows a screenshot of the Jimbo website on a blue background. At the top, there is a navigation menu with links: Home, Why Jimbo, Features, Videos, Road Map, Data Transfer, Support, FAQs, and SuperTester. The main heading is "Simplify Your Business Admin" in large white and yellow text. Below this, there is a sub-heading: "Introducing Jimbo, our all-in-one job management platform that automates back-office admin. Say goodbye to juggling multiple apps and say hello to a smarter way of running your business".

An "Important" notice states: "Jimbo is now also available in New Zealand for Jim's Group Franchisees". Below this notice are three buttons: "Download on the App Store", "GET IT ON Google Play", and "GO TO Web Login". A red circle highlights the "GO TO Web Login" button, with a red arrow pointing from it towards the top right of the page.

Below the buttons, there is a link: "Need help getting started? Download our quick start guide here". A star icon indicates "Works best on iOS 26 (iPhone 12) and Android 16 onwards".

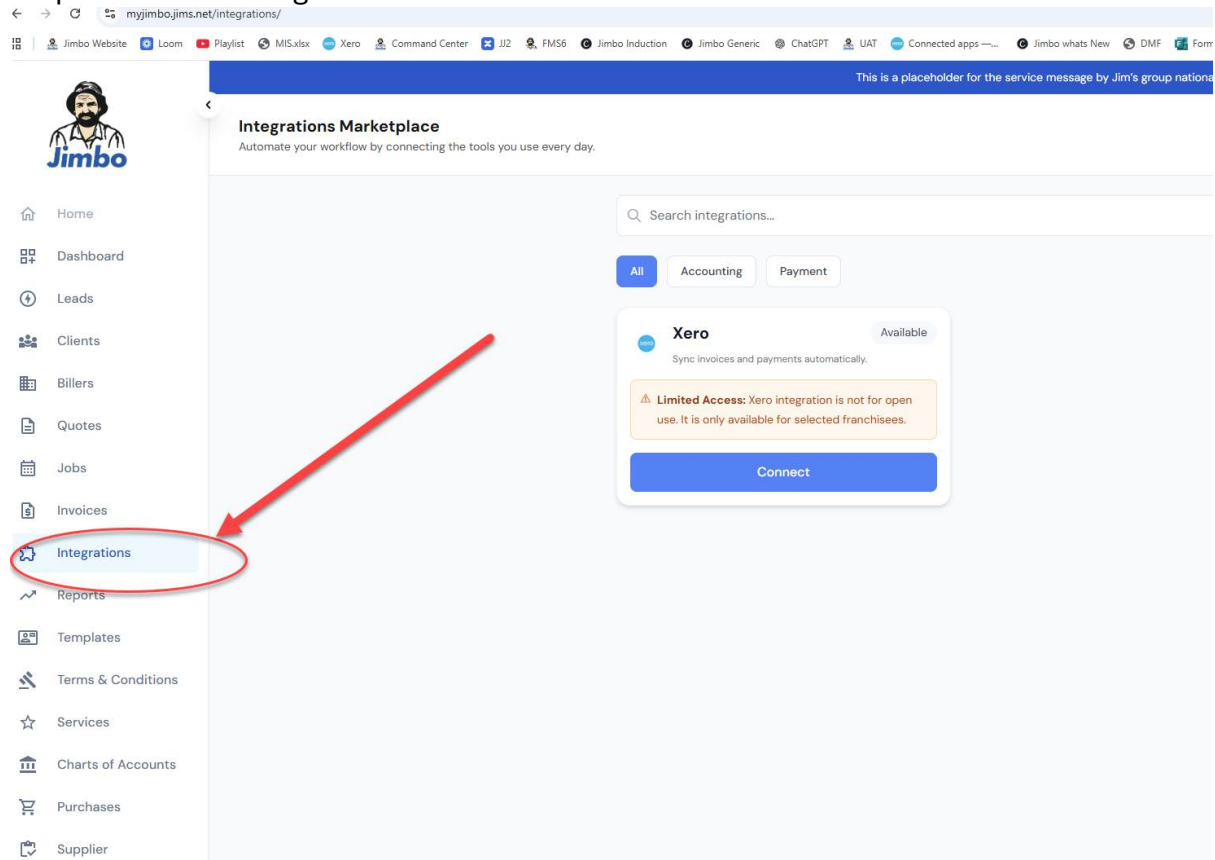
Another "Important" notice says: "To get started with Jimbo, please reset your password (one-time only). This will also update your Jim's Online login. Tap 'Forgot Password' on the app, or click here: Reset Password".

Below that, it says: "To start receiving leads in Jimbo, you only need to log in once. After that initial login, all future leads will automatically appear in your account. Your Jimbo account is activated from the moment you log in for the first time."

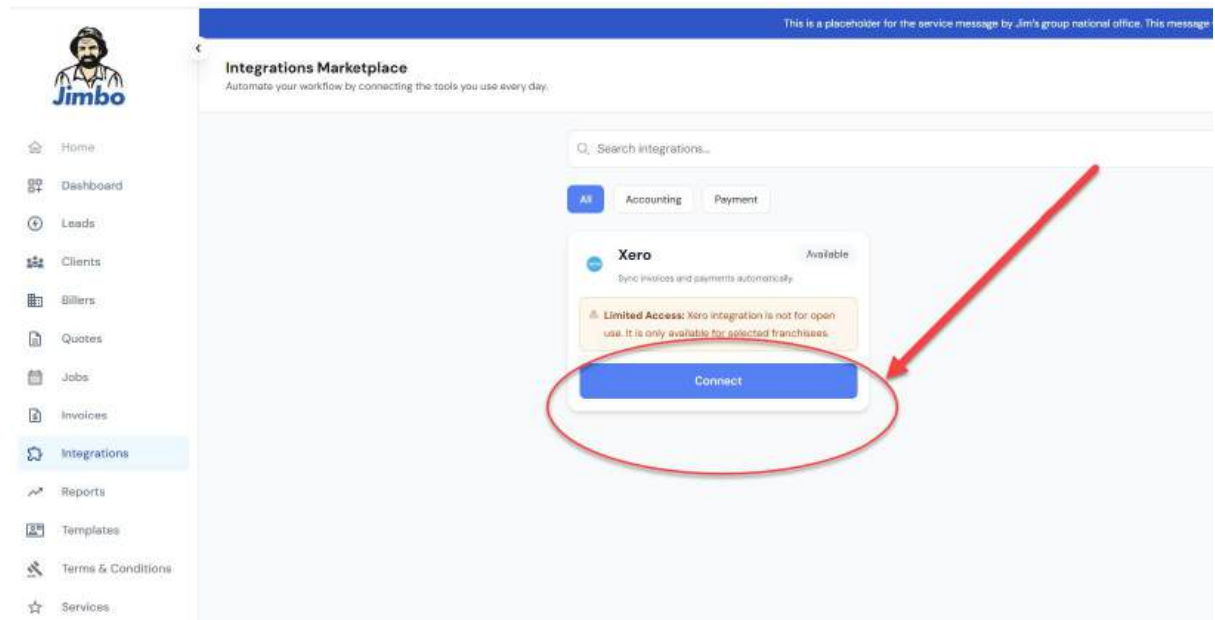
At the bottom, there is a section for "Jimbo Almond v1.4 - Polished. Snappier. Still All Jimbo" and a "What's New?" section with a "What's Next?" link.

On the right side of the screenshot, a hand is holding a smartphone displaying the Jimbo mobile app. The app interface includes a "Welcome" message for "Sarfy Soudagar", a search bar for "Client Name", a yellow notification banner for "Jimbo 1.1.1 Has Landed!" with instructions to go to settings and check for updates, and a "Quick links" section with icons for Dashboard, Leads, Quotes, Jobs, Invoices, Settings, Services, Clients, Purchases, Suppliers, and Support. A bottom navigation bar shows icons for Home, Leads, Jobs, Invoices, and Menu.

Step#2: Click on integrations



Step#3: Click Connect



Step#4: Click Connect to XERO

Connect Your Xero Account

Automate your accounting by syncing invoices and contacts directly to Xero.

[VIEW LOGS](#)

 **Limited Access**

Xero integration is not for open use. It is only available for selected franchisees.

Step 1: Authorization

Connect your account to securely transfer data. We use a secure OAuth process to ensure your information is protected.

● Not Connected

[CONNECT TO XERO](#)



Step#4: Enter your XERO credentials



Log in to Xero

to continue to Jimbo 4 FSE Connection Bridge

Email address

Password

[Log in](#)

[Forgot password?](#)

[Can't log in?](#)

Step#5: Check details and click Allow access



Jimbo 4 FSE Connection Bridge

wants access to:

Organisation data



Jim's Group

View and manage your business transactions, contacts, and organisation settings

User account information



Sarfaraz Soudagar

View your name, email, and user profile.

By allowing access, you agree to the transfer of your data between Xero and this application in accordance with Xero's [Terms of use](#) and the application provider's [terms of use](#) and [privacy policy](#).

You can disconnect at any time by going to [Connected apps](#) in your Xero settings.

Allow access

Cancel



Step#5: Check for successful connection

Connect Your Xero Account

Automate your accounting by syncing invoices and contacts directly to Xero.

[VIEW LOGS](#)**⚠ Limited Access**

Xero integration is not for open use. It is only available for selected franchisees.

Step 1: Authorization

Connect your account to securely transfer data. We use a secure OAuth process to ensure your information is protected.

● Connected to Jim's Group

[DISCONNECT](#)**Step 2: Revenue Chart of Accounts Mapping** ✓ COMPLETED

✓ All accounts are mapped. Your Chart of Accounts mapping is complete and ready for syncing.

Select Xero account(s) to map ▾

[IMPORT
SELECTED](#)

Jimbo Code	Jimbo Name	Xero Account	Status
200	Default (Revenue)	200 - Sales ▾	✓ Synced ⚠ Name differs
260	Other Revenue	260 - Other Rev... ▾	✓ Synced
270	Interest Income	270 - Interest In... ▾	✓ Synced
MI	Mowing	CZ1 - Gradenin... ▾	✓ Synced ⚠ Code differs ⚠ Name differs
NDIS	NDIS	260 - Other Rev... ▾	✓ Synced ⚠ Code differs ⚠ Name differs

[SAVE MAPPING](#)

Step#6: Map your existing Jimbo Chart of Accounts to XERO chart of accounts.

Connect Your Xero Account

[VIEW LOGS](#)

Automate your accounting by syncing invoices and contacts directly to Xero.

⚠ Limited Access
Xero integration is not for open use. It is only available for selected franchisees.

Step 1: Authorization

Connect your account to securely transfer data. We use a secure OAuth process to ensure your information is protected.

● Connected to **Jim's Group**

[DISCONNECT](#)

Step 2: Revenue Chart of Accounts Mapping ✓ COMPLETED

Select Xero account(s) to map ▾

[IMPORT SELECTED](#)

✓ All accounts are mapped. Your Chart of Accounts mapping is complete and ready for syncing.

Jimbo Code	Jimbo Name	Xero Account	Status
200	Default (Revenue)	200 - Sales	✓ Synced ⚠ Name differs
260	Other Revenue	260 - Other Rev...	✓ Synced
270	Interest Income	270 - Interest In...	✓ Synced
M1	Mowing	CZ1 - Gradenin...	✓ Synced ⚠ Code differs ⚠ Name differs
NDIS	NDIS	260 - Other Rev...	✓ Synced ⚠ Code differs ⚠ Name differs

[SAVE MAPPING](#)

Step#7: Click save Mapping

Step 2: Revenue Chart of Accounts Mapping ✓ COMPLETED

✓ All accounts are mapped. Your Chart of Accounts mapping is complete and ready for syncing.

Select Xero account(s) to map ▼ IMPORT SELECTED

Jimbo Code	Jimbo Name	Xero Account	Status
200	Default (Revenue)	200 - Sales	✓ Synced ⚠ Name differs
260	Other Revenue	260 - Other Rev...	✓ Synced
270	Interest Income	270 - Interest In...	✓ Synced
M1	Mowing	CZ1 - Gradenin...	✓ Synced ⚠ Code differs ⚠ Name differs
NDIS	NDIS	260 - Other Rev...	✓ Synced ⚠ Code differs ⚠ Name differs

SAVE MAPPING

Step#8: Wait for the Mappings Saved Successfully Message

This is a placeholder for the service message by jim's group nation

✓ Mappings saved successfully

Step#9: That's it, all done, a new column will appear next to Invoices as below

Invoices

13 invoices available for this service message for jim's group nation office. This message will be printed and sent.

No other data available

Client	Invoice Number	Contact Number	Issue Date	Amount	Status	Over Synced
Alison Matthews	1443	+61 401 3248	18 Mar 03:52 pm	\$50.00	Due	✓
Sakara Henderson	1434	+61 409 991 018	18 Mar 11:31 pm	\$35.00	Due	✓
Sakara Henderson	1433	+61 409 991 018	18 Mar 12:11 pm	\$35.00	Due	✓
Olivia Smith	1431	+61 409 991 018	18 Mar 12:00 pm	\$35.00	Due	✓
Olivia Smith	1430	N/A	18 Mar 04:11 am	\$30.00	Due	✓
Andreas Olsen	1423	+61 401 401 218	18 Mar 12:26 pm	\$0.00	Due	✗
Andreas Olsen	1415	+61 401 401 218	18 Mar 12:30 pm	\$0.00	Due	✗
James White	1401	+61 409 991 018	17 Mar 04:23 pm	\$22.00	Due	✓
John Rick Jr	1392	+61 409 991 018	12 Mar 03:05 pm	\$50.00	Due	✗

Video Guides

From lead to invoice, quick flow video	https://youtu.be/xrscU4Ak9V0
Home screen	https://youtu.be/32dFufGeEPg
Dashboard Screen	https://youtu.be/5mIHW3m20sU
Leads Screen	https://youtu.be/p655wJ_ivXE
Clients Screen	https://youtu.be/in_U7ekuqo0
Archiving clients	https://youtu.be/F0dXUp_oT4c
Client Tags Feature	https://youtu.be/bvBuU6RO9_Q
How to create a Quote	https://youtu.be/mdT3zSvVEJk
Quick ways to send a Quote	https://youtu.be/ne95go4Rad0
Quotes and Invoices via SMS	https://youtu.be/dwNyJit_vEg
Invoice Screen	https://youtu.be/7gXSSOttXHI
Quick ways to send an Invoice	https://youtu.be/g0ou3lakpbg
How to create an Invoice	https://youtu.be/N1G3nnPTTPo
How to create a Job	https://youtu.be/9OVT3ava7fw
Quick ways to schedule Jobs	https://youtu.be/cKAA-1SuyzQ
Recurring jobs on App	https://youtu.be/_0yf--NEnXE
Recurring jobs on Web	https://youtu.be/AzkAQGpiEAW
How to add Services	https://youtu.be/CqrpEP8FUY4
Chart of accounts – Revenue	https://youtu.be/9Jq82JFwYxg
Chart of accounts – Expenses	https://youtu.be/pE9mkhlz4dU
Biller Module	https://youtu.be/k4WRBMOsLM
Alarms	https://youtu.be/JsOps1laUW8
Bank details	https://youtu.be/SH1ur4FumNs
Templates	https://youtu.be/5E8VdGqY8ug
Terms and conditions	https://youtu.be/2Znze4xEBkM
User Preferences	https://youtu.be/0388ZZ-QIIA
How to add Google Reviews	https://youtu.be/Es-sKGlegrA
Purchases and Suppliers	https://youtu.be/A2yHe5eGgbo
Purchase History	https://youtu.be/YP5GjtdgOCI
Profit and Loss Report	https://youtu.be/bh8LPYAPHoE
GST Report	https://youtu.be/zfyROJJ2GQI
Different Types of Clients	https://youtu.be/Rg2o78oj_40
Biller Parties	https://youtu.be/_p9idfldcMg
Masterclass	https://www.youtube.com/watch?v=P4g4yo0c3zQ
Jimbo Podcast	https://youtu.be/S8MXRRZ51hg