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 created a Pick-Up Lead in Jim's Online, but it's showing in Jimbo?

Yes, all pickup leads entered into Jim's Online will be visible in Jimbo under your uncontacted section. From here simply swipe right to mark as contacted.

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

Yes! 😊 👉 To get started, just head to the Data Transfer section on the Jimbo website.

❓ 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:**

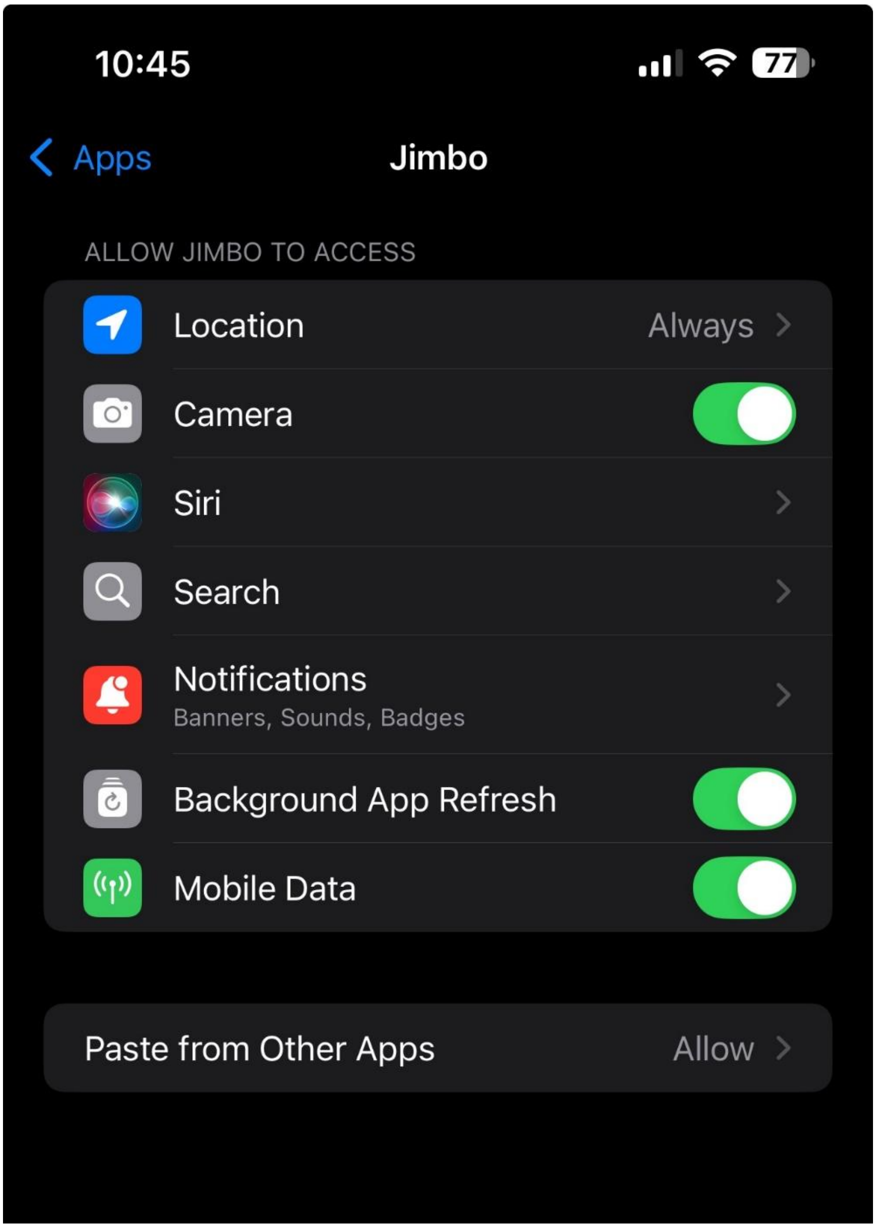
While the settings below are recommended for the best experience with Jimbo, your iPhone's **privacy preferences and system settings will always take priority** over the app. Please review and adjust these settings based on your **personal needs and comfort level**.

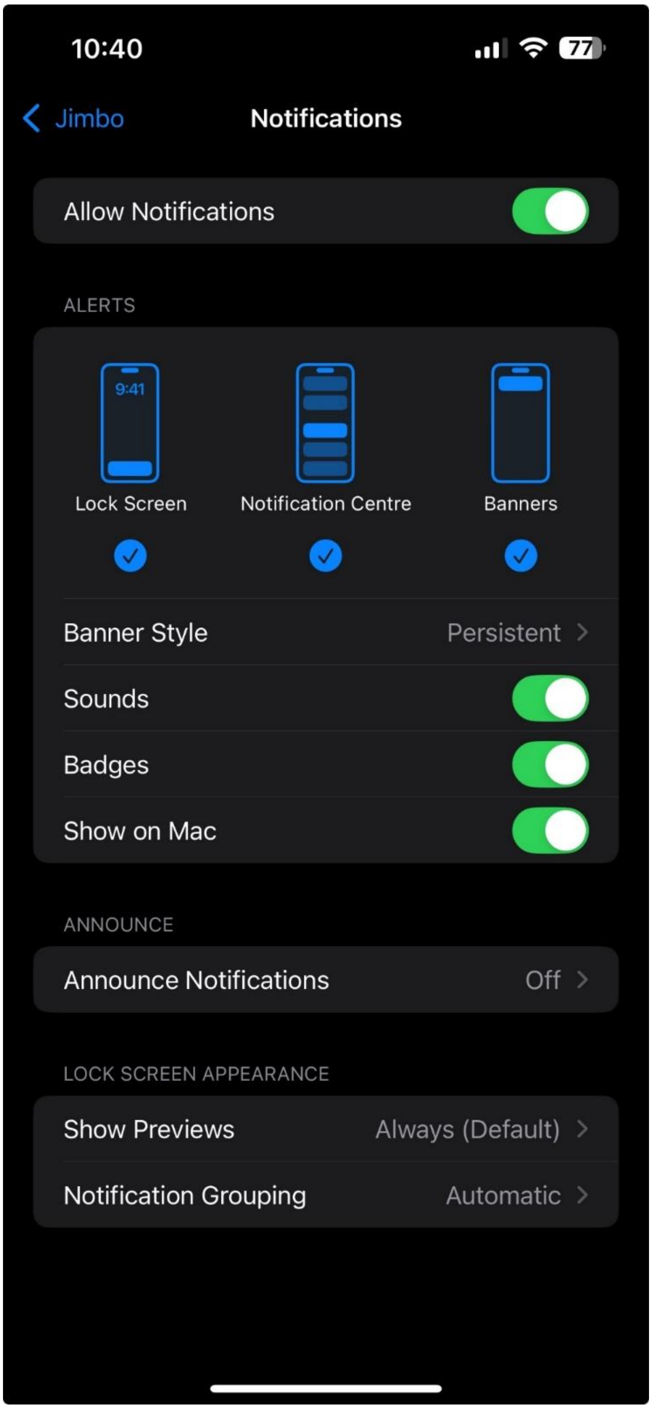
📲 How to Find Jimbo Settings on iPhone

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**


10:45
Apps
Jimbo
ALLOW JIMBO TO ACCESS
Location
Always
Camera
Siri
Search
Notifications
Banners, Sounds, Badges
Background App Refresh
Mobile Data
Paste from Other Apps
Allow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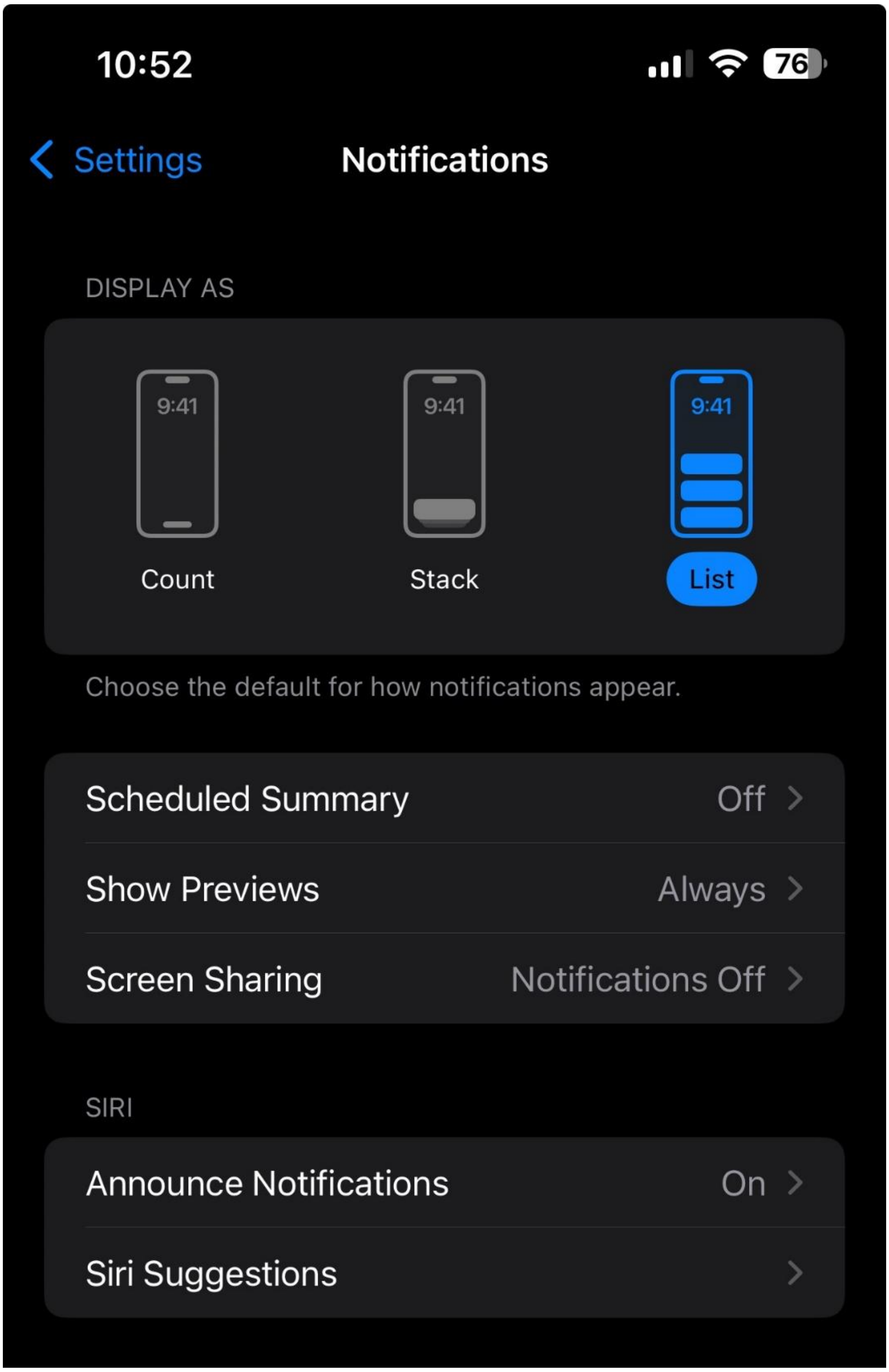
77
Jimbo
Notifications
Allow Notifications
ALERTS
9:41
Lock Screen
Notification Centre
Banners
Banner Style
Persistent
Sounds
Badges
Show on Mac
ANNOUNCE
Announce Notifications
Off
LOCK SCREEN APPEARANCE
Show Previews
Always (Default)
Notification Grouping
Automatic

🔔 **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

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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.

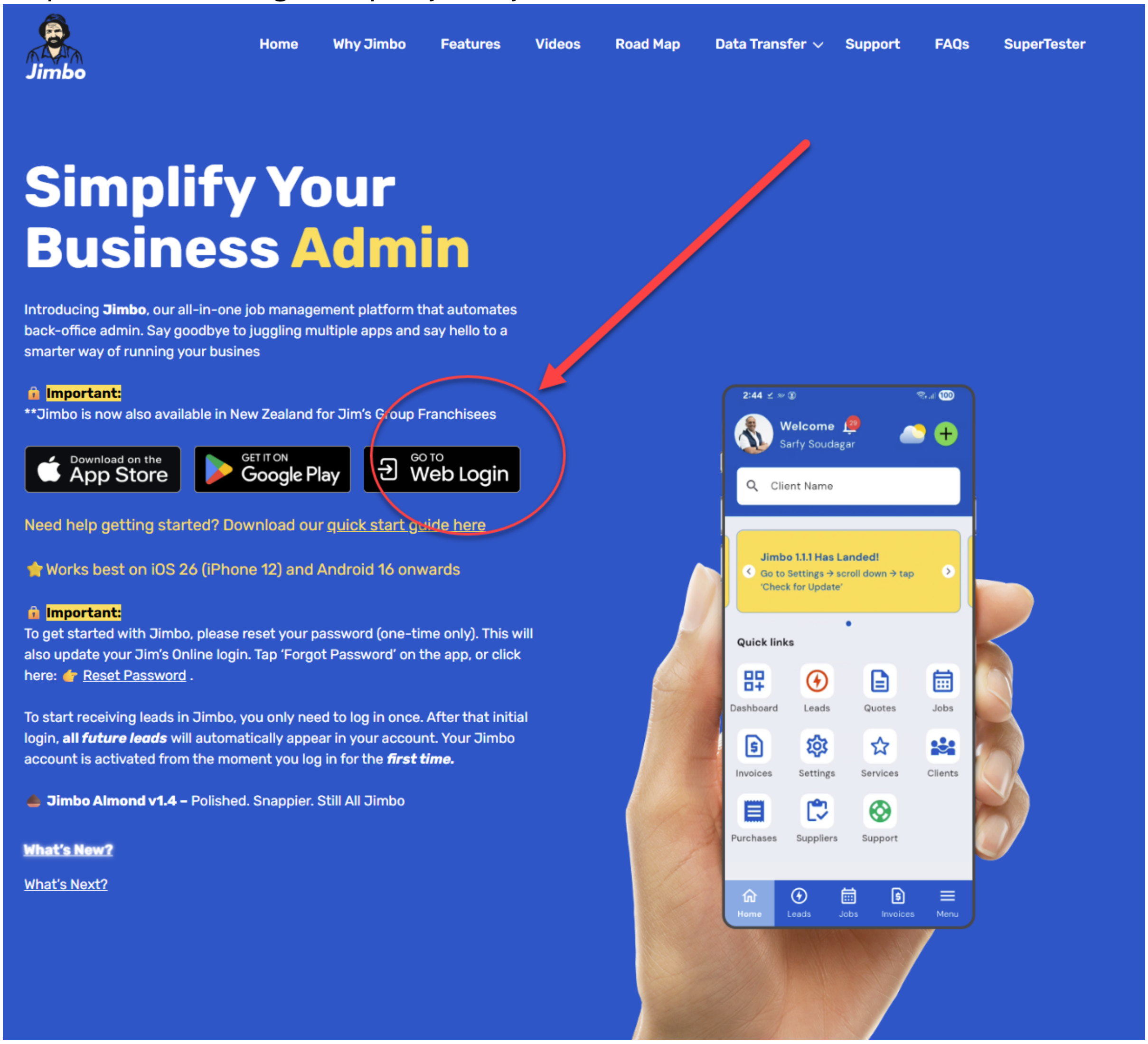
If you manage more than one franchise, you'll need to log out of one account and log in to the other when you want to switch between them.

- 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.

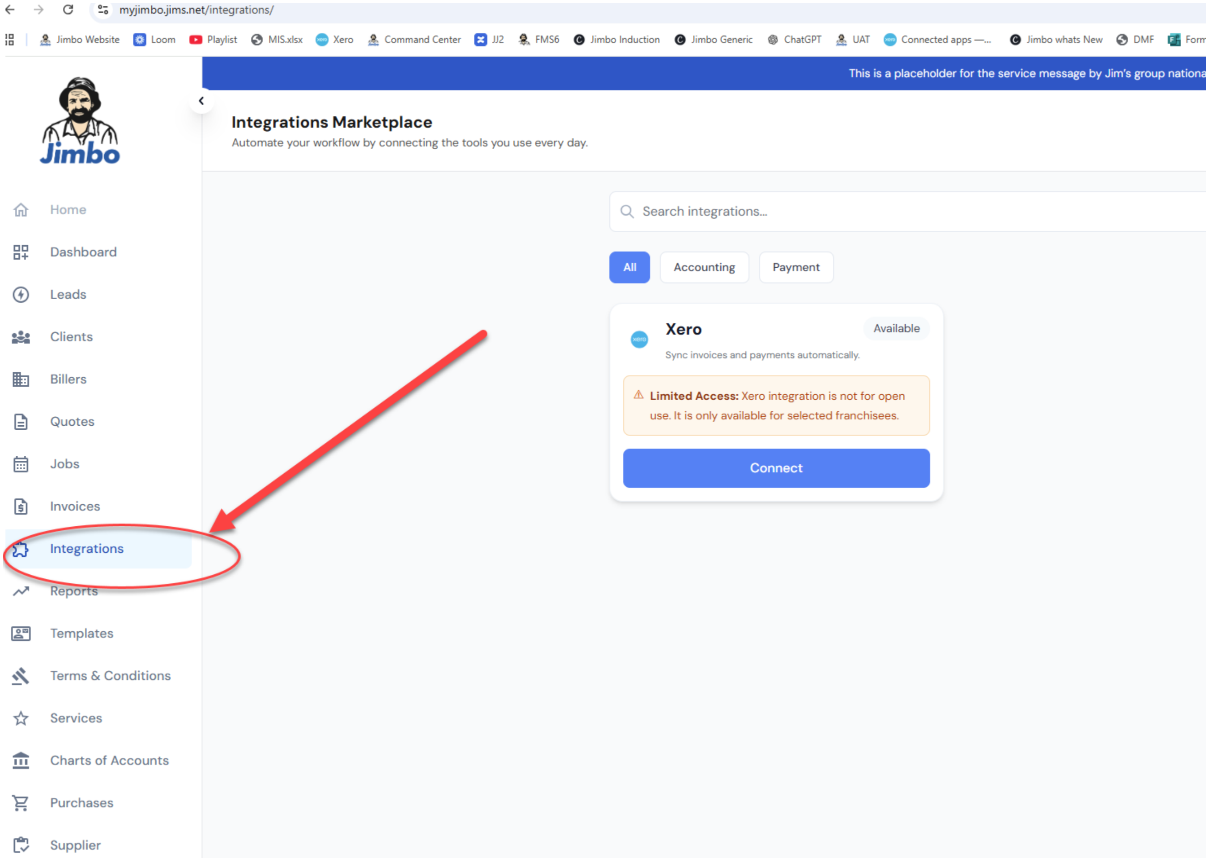
We understand this can be a bit of extra work, and longer-term we're exploring ways to make managing multiple codes simpler.

Steps for Xero Integration

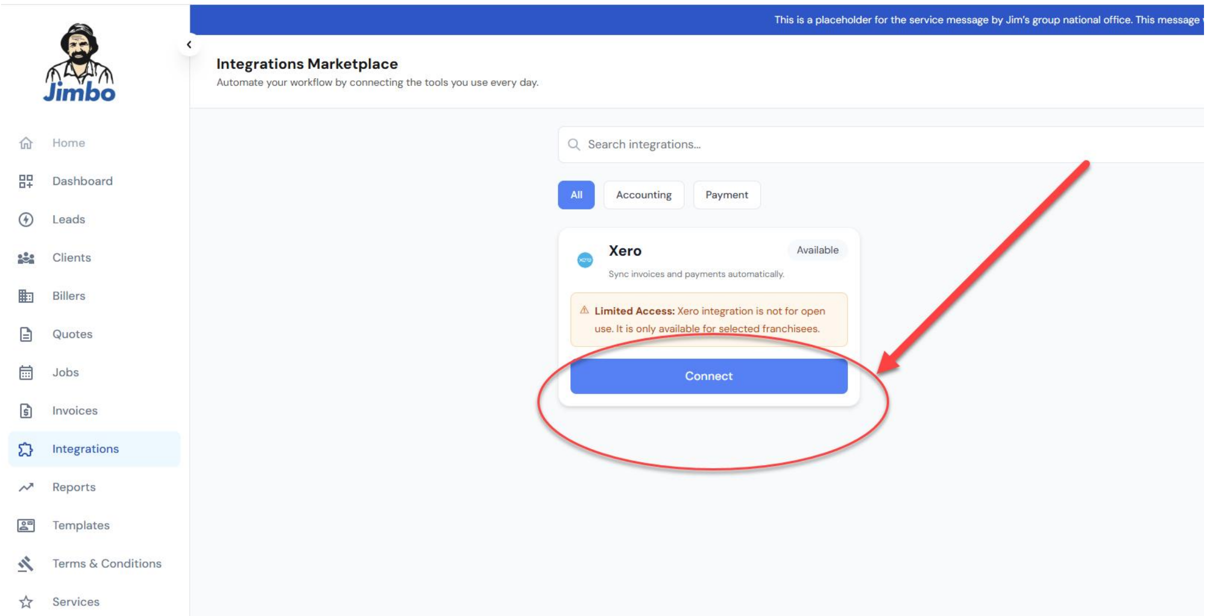
Step#1: Go to web login : https://jimbo.jims.net/



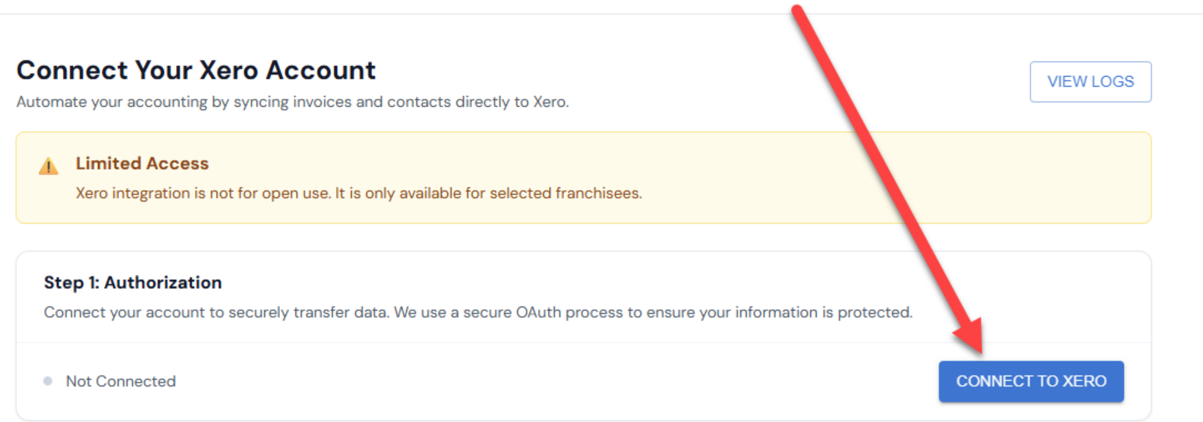
Step#2: Click on integrations



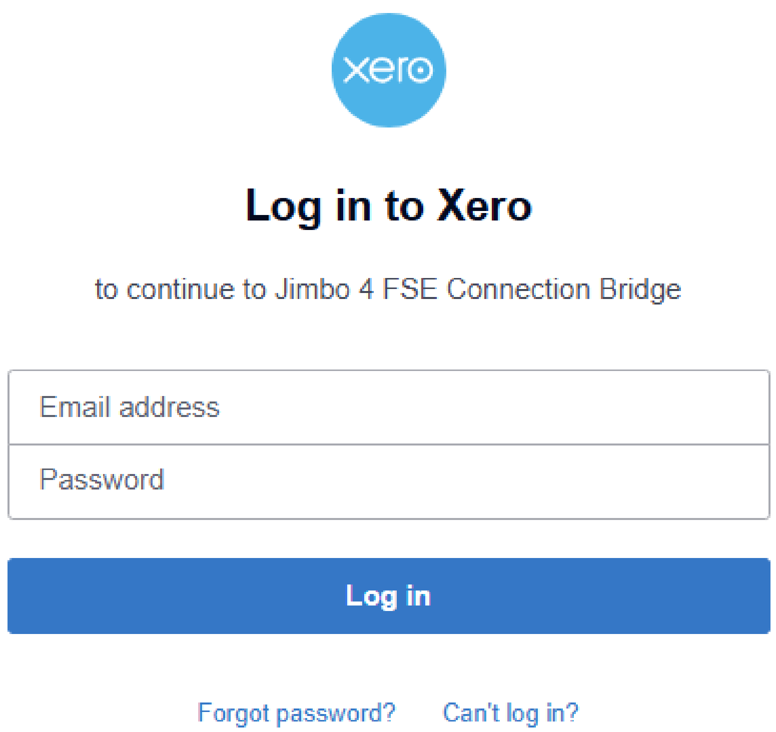
Step#3: Click Connect



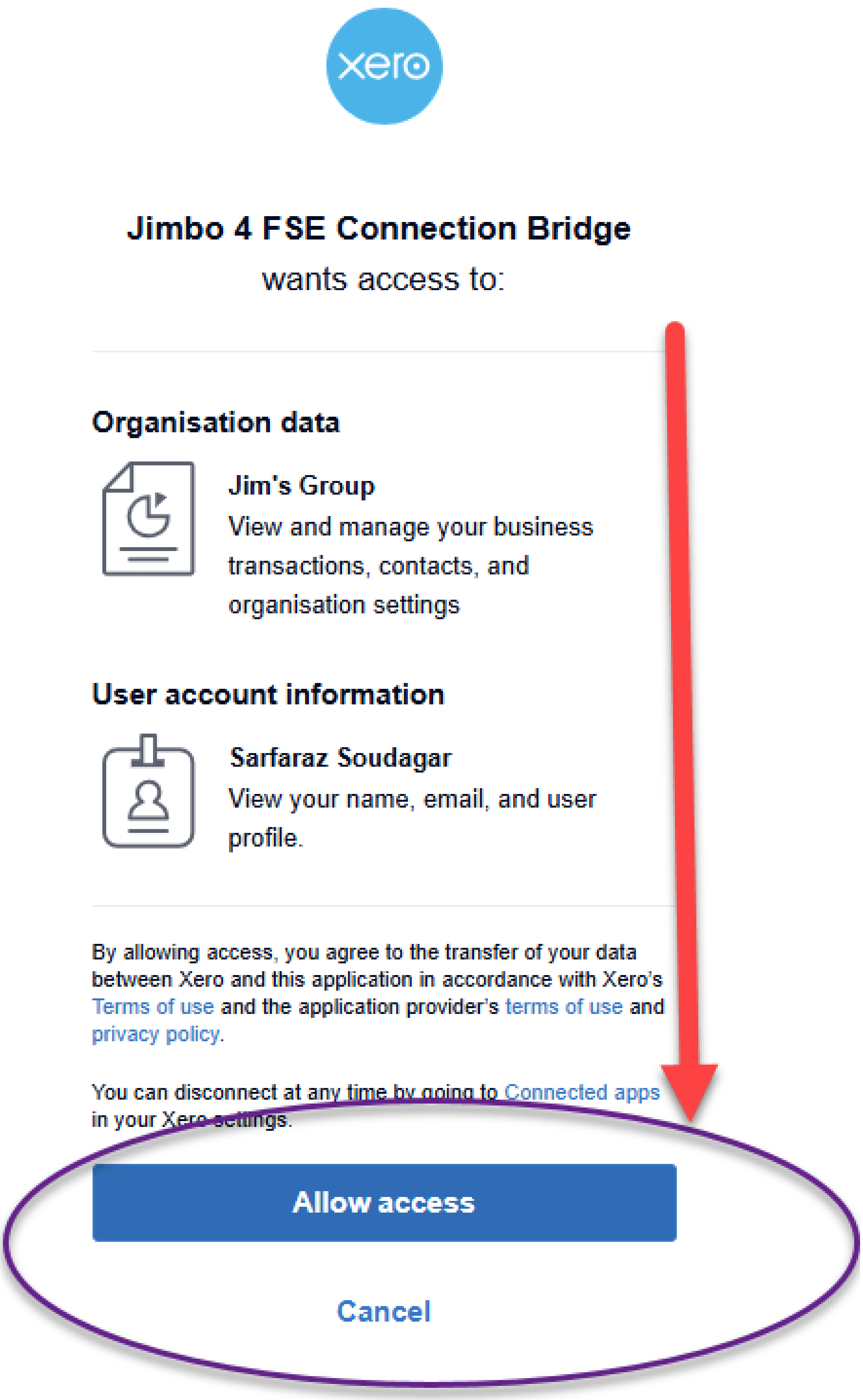
Step#4: Click Connect to XERO



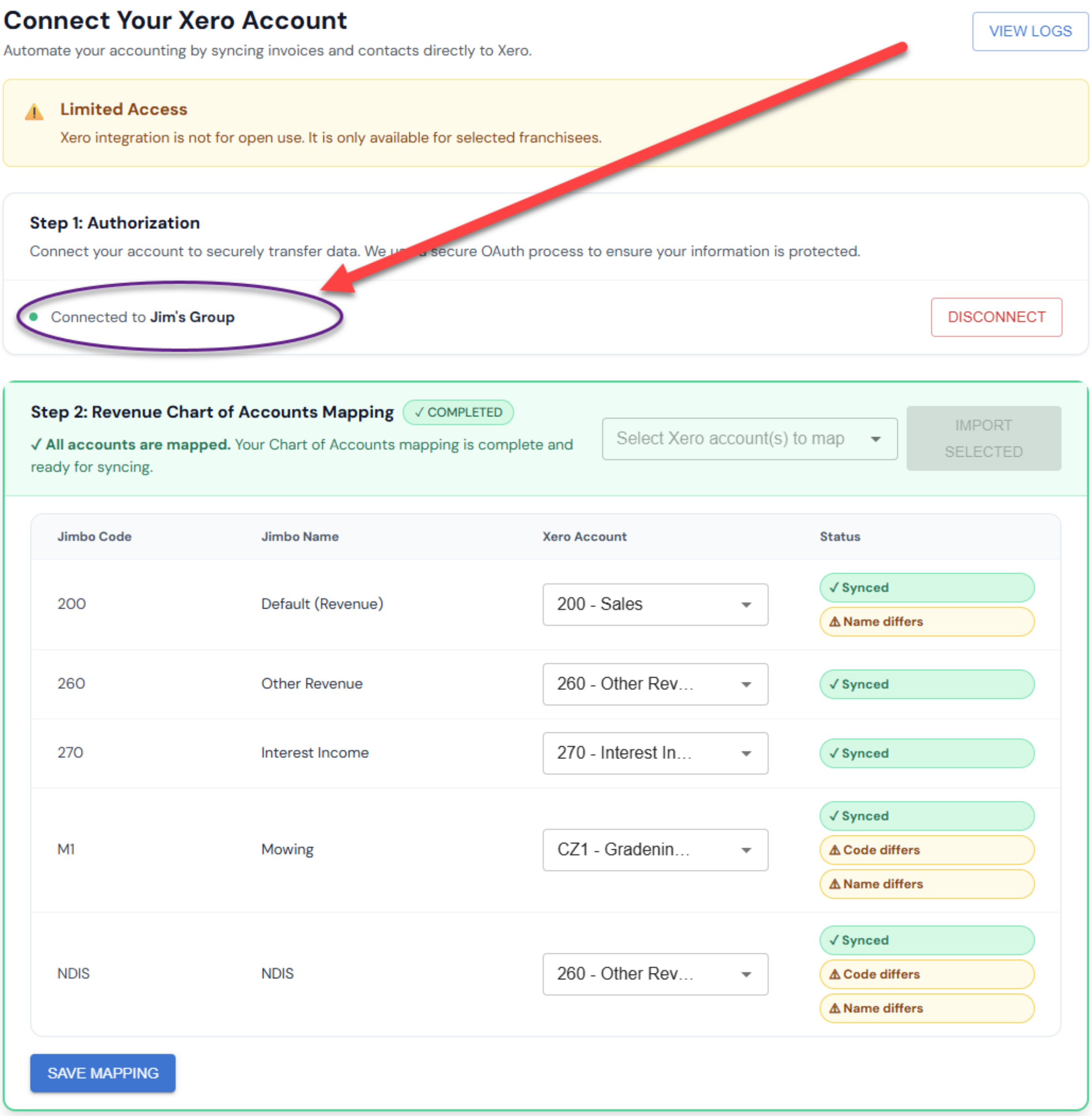
Step#4: Enter your XERO credentials



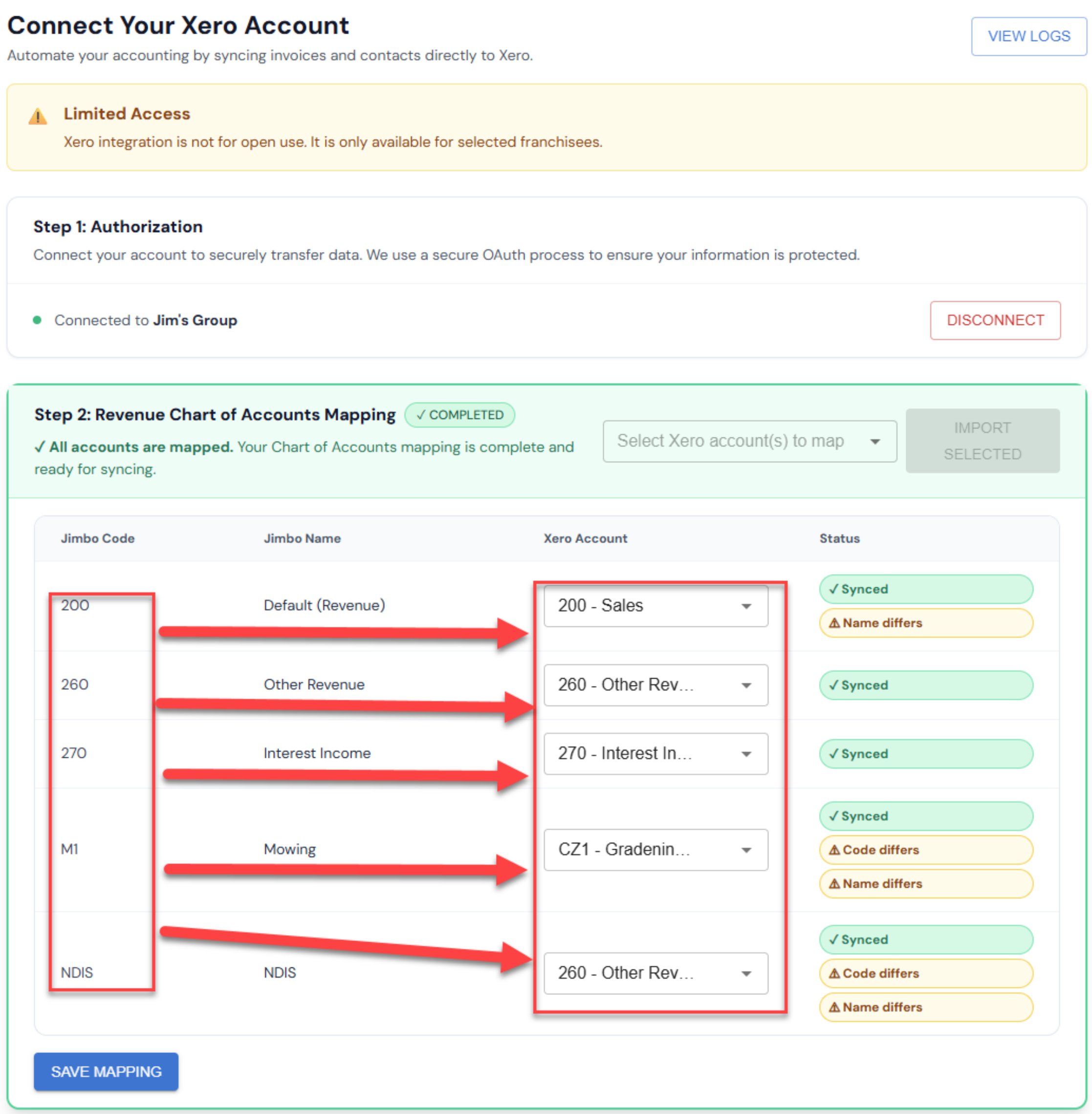
Step#5: Check details and click Allow access



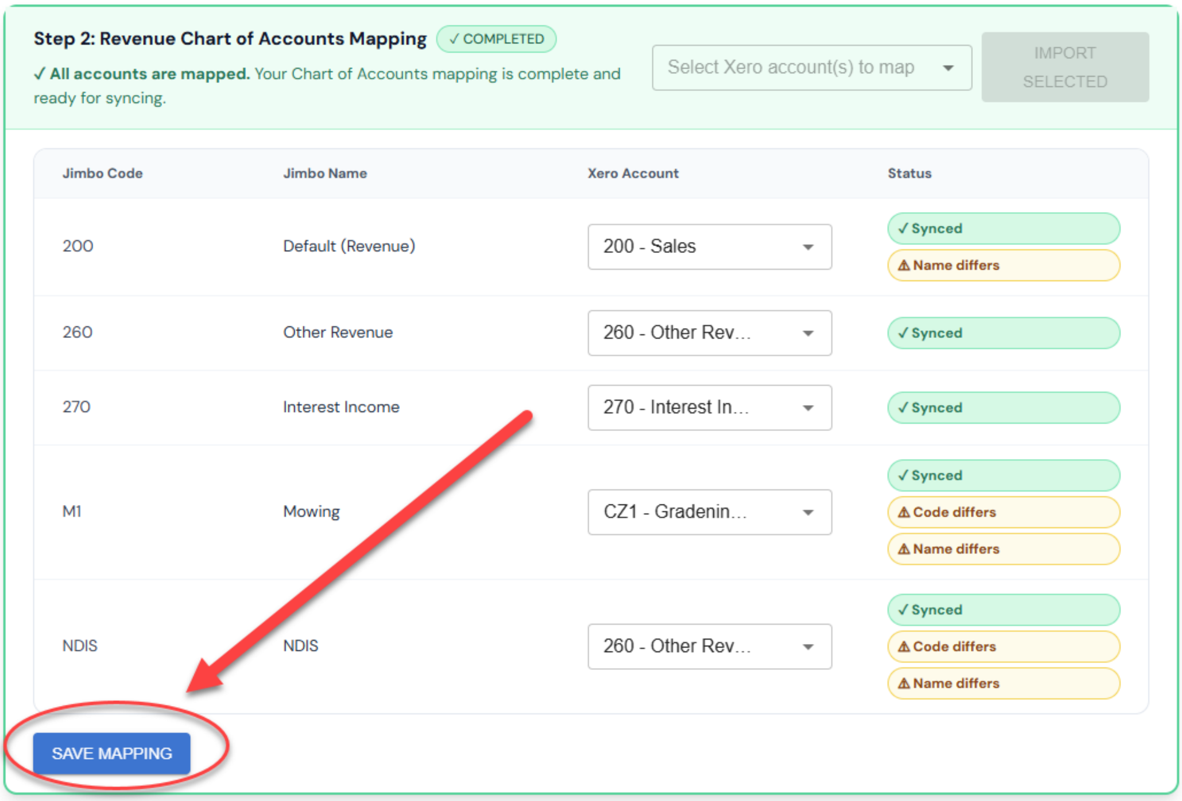
Step#5: Check for successful connection



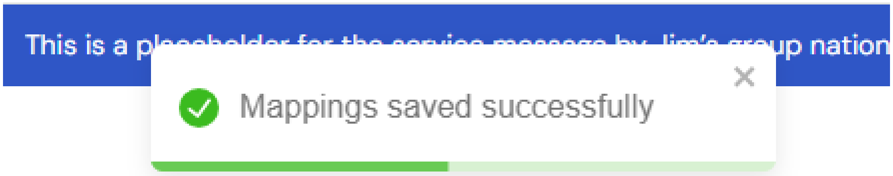
Step#6: Map your existing Jimbo Chart of Accounts to XERO chart of accounts.



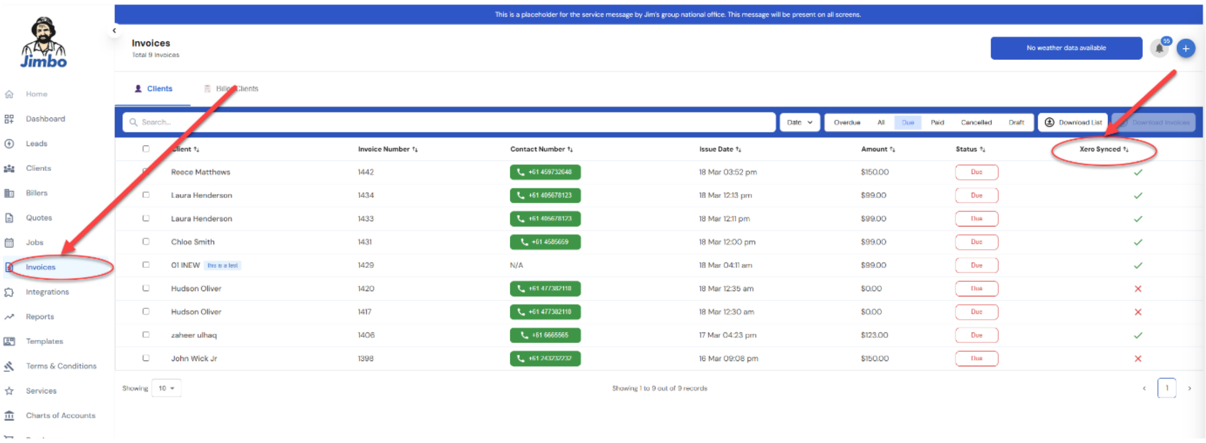
Step#7: Click save Mapping



Step#8: Wait for the Mappings Saved Successfully Message



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



Video Guides:

From lead to invoice, quick flow video	https://youtu.be/xrscU4Ak9V0
Home screen	https://youtu.be/32dFufGeEPg
Dashboard Screen	https://youtu.be/5mlHW3m20sU
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/k4WRBMOnsLM
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
Xero Integration	https://youtu.be/i6uD_2fNJ7A

Masterclass	https://www.youtube.com/watch?v=P4g4yo0c3zQ
PodCast Vid	https://youtu.be/S8MXRRZ51hg