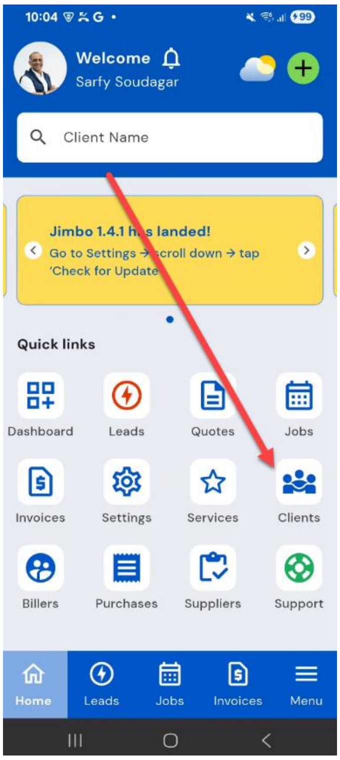
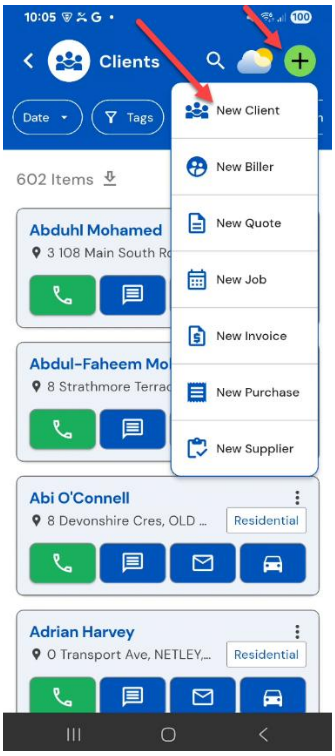
Jimbo Training Manual

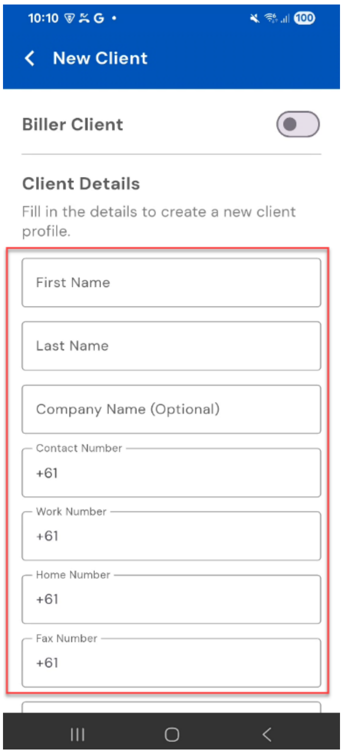
1: CREATE A CLIENT

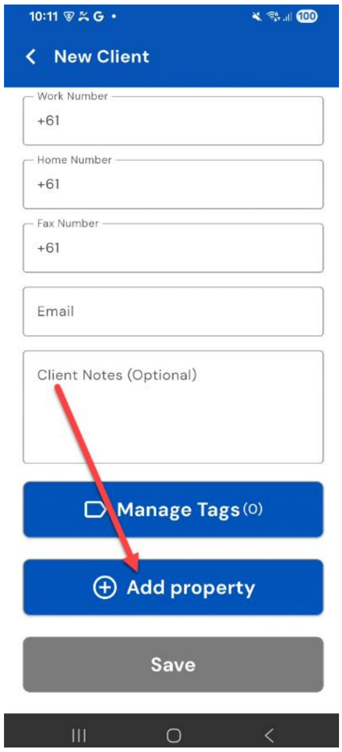
• Go to Home → Clients
• Click the + icon → New Client

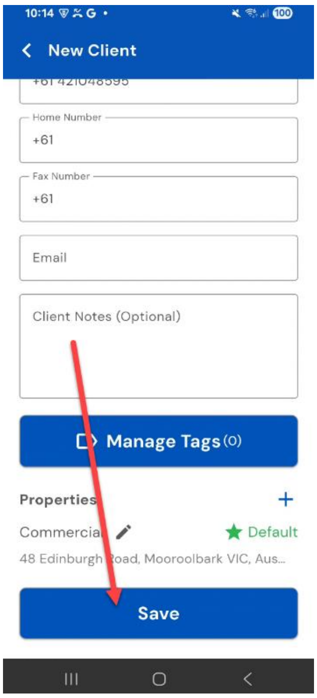
- Fill in the Client Details
- Click Add Property

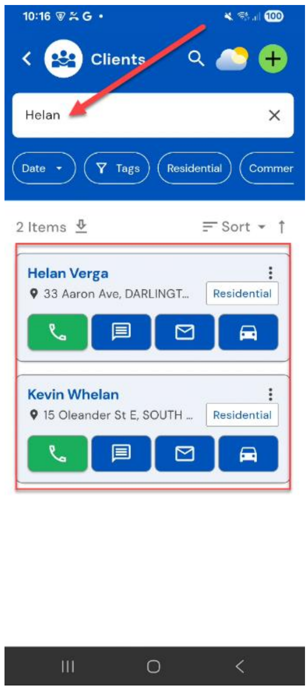












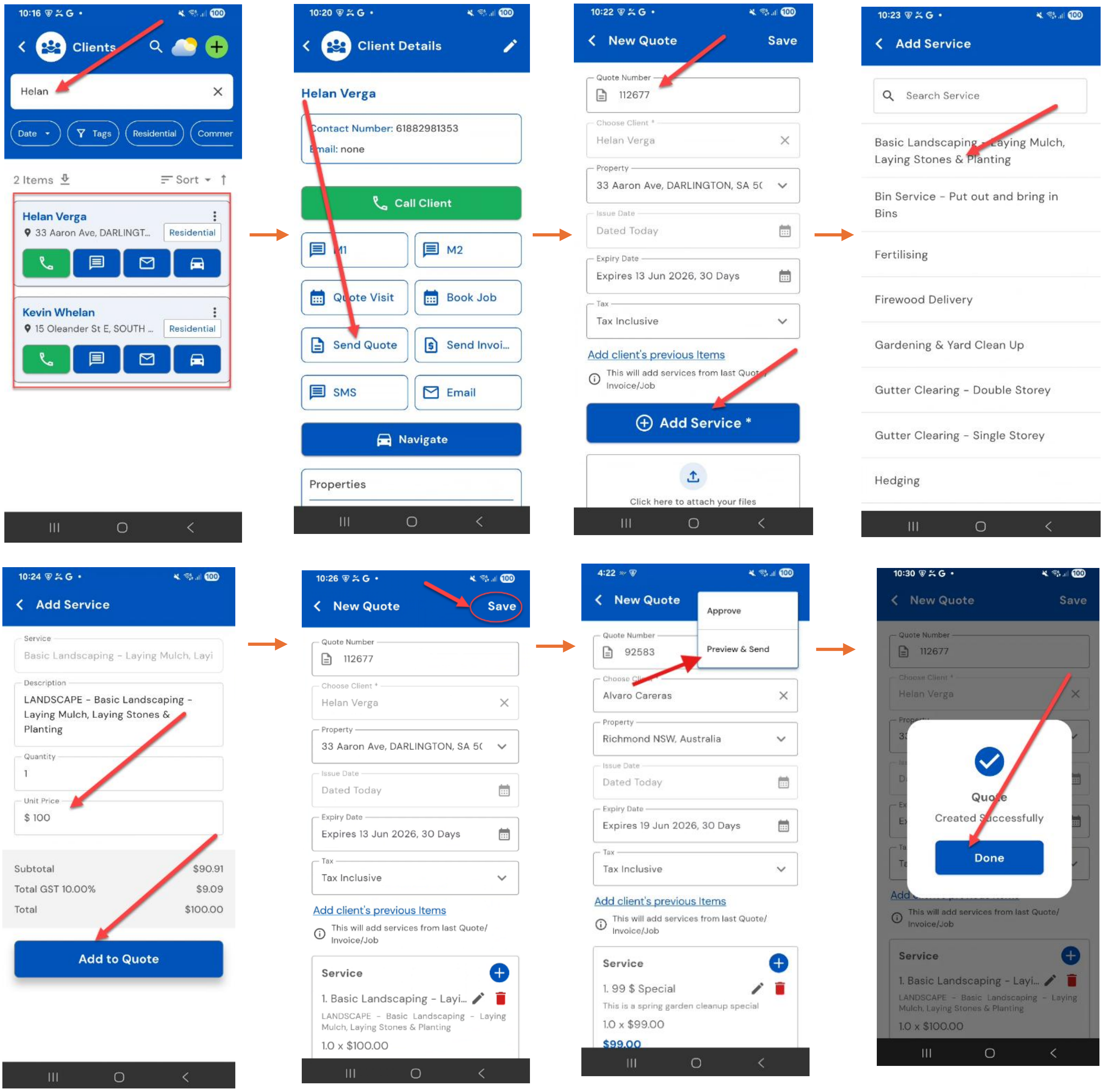
2a: CREATE A QUOTE (And send Immediately)

• Go to Clients
• Search for the client by First name (top right search icon). Then click on the client
• Click Send Quote

Quote Details:

- Quote Number: Any sequence of digits
- Add any service → Set Unit Price as required
- Click Add to Quote
- Click → Save (top right-hand side) → **Preview & Send**

Note:
Approve: Creates and approves the quote in the system without sending it via email.
Preview and Send: Creates and approves the quote, plus sends it to the client via email



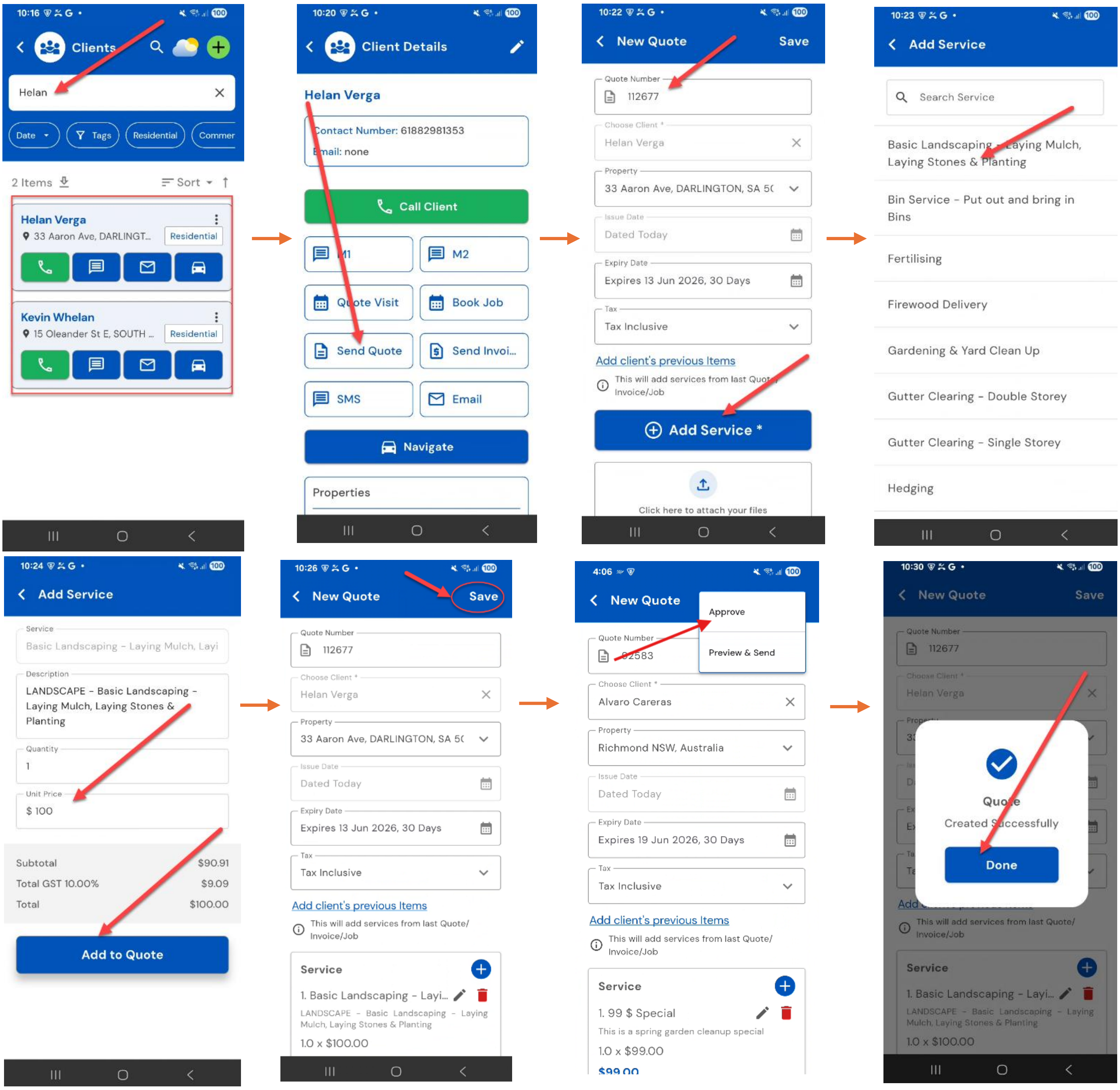
2b: CREATE A QUOTE (And send Later)

• Go to Clients
• Search for the client by First name (top right search icon). Then click on the client
• Click Send Quote

Quote Details:

- Quote Number: Any sequence of digits
- Add any service → Set Unit Price as required
- Click Add to Quote
- Click → Save (top right-hand side) → **<u>Approve</u>**

<u>Note:</u>
Approve: Creates and approves the quote in the system <u>without</u> sending it via email.
Preview and Send: Creates and approves the quote, <u>plus</u> sends it to the client via email

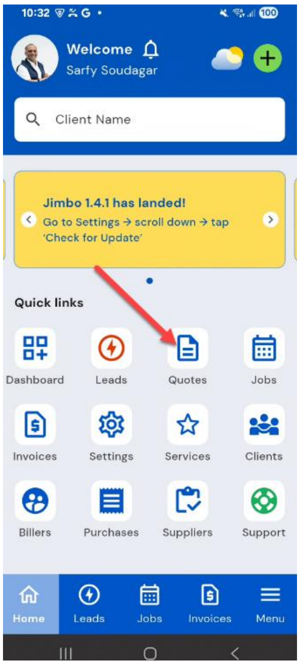


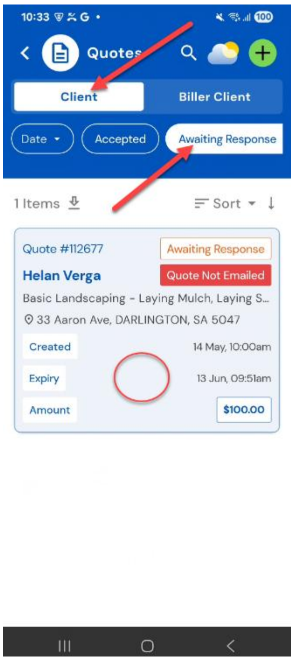
3: ACCEPT THE QUOTE – MANUALLY

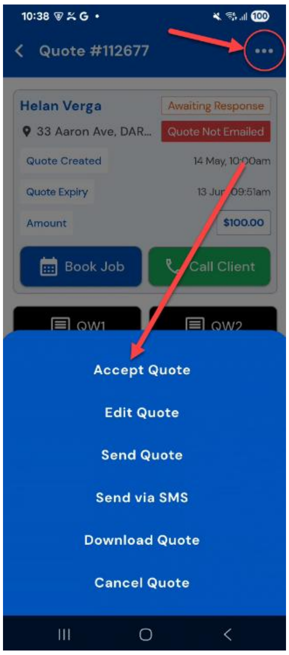
Click on Quotes.

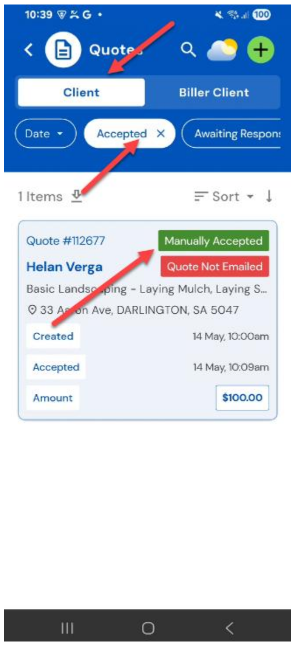
- Click on Awaiting Response.
- Select the relevant Quote.
- Click on the Three Dots (⋯) menu from the top right-hand side
- Click Accept Quote <u>(you have now, manually accepted the Quote on behalf of the client)</u>

• Go to Notifications → View accepted quote
• Go to Quotes → Accepted → the Quote is now marked as accepted







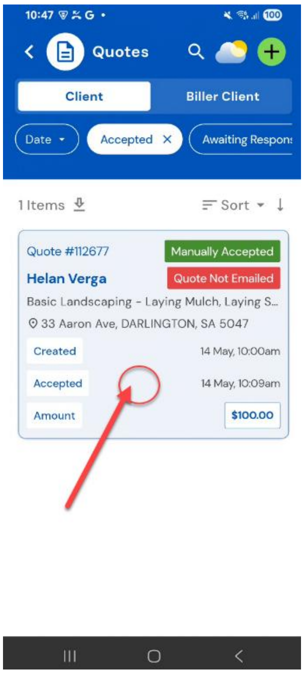


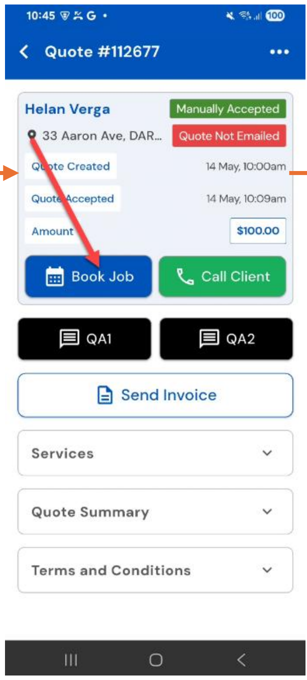
4: BOOKING A JOB – All Day / Anytime

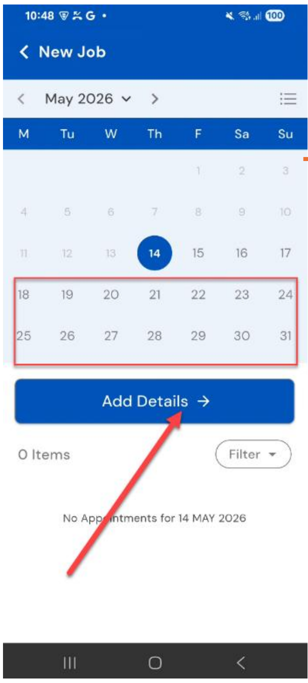
Go to Quotes, Accepted, Click on the relevant Quote

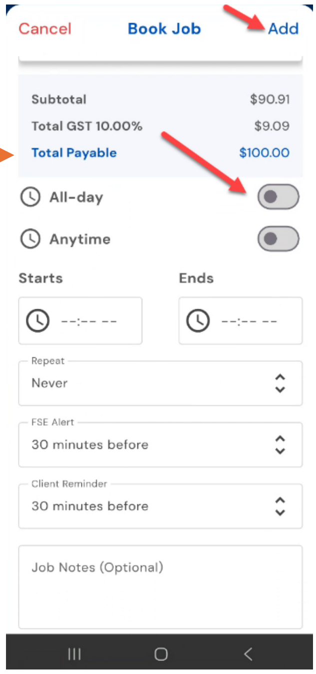
- Click Book Job
- Select the Date to Book→ Add Details

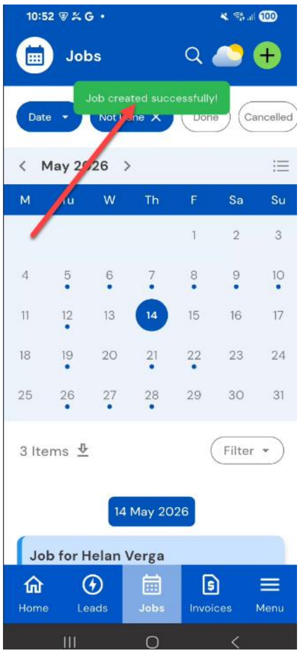
  - Add Time
  - FSE Alert
  - Client Reminder
  - Click Add

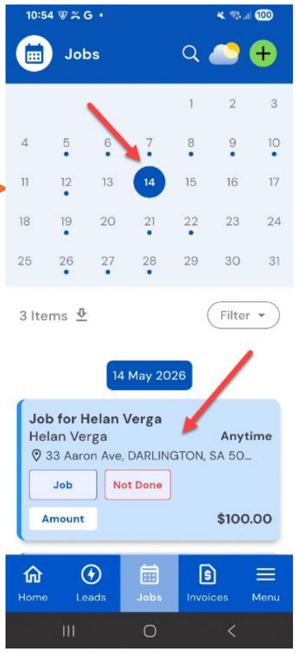






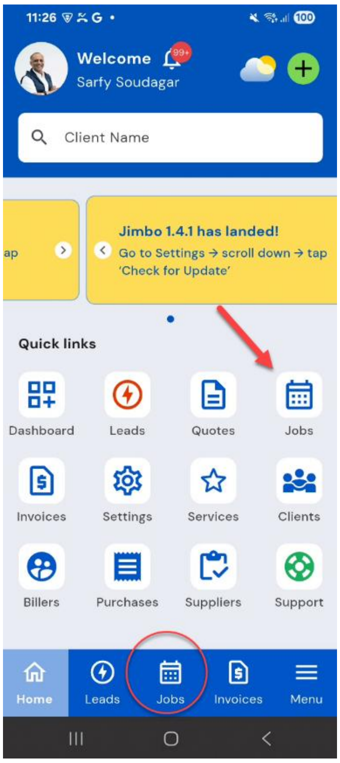


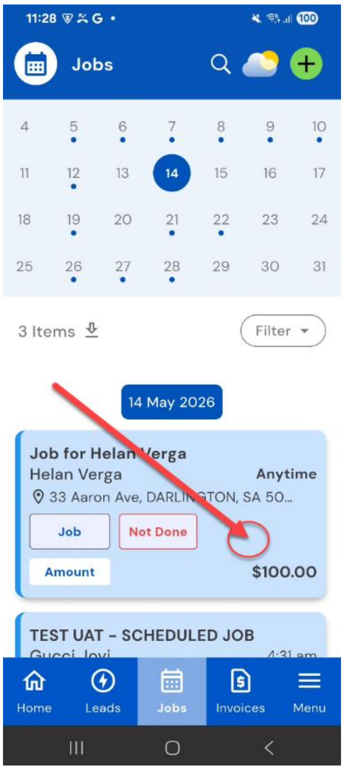


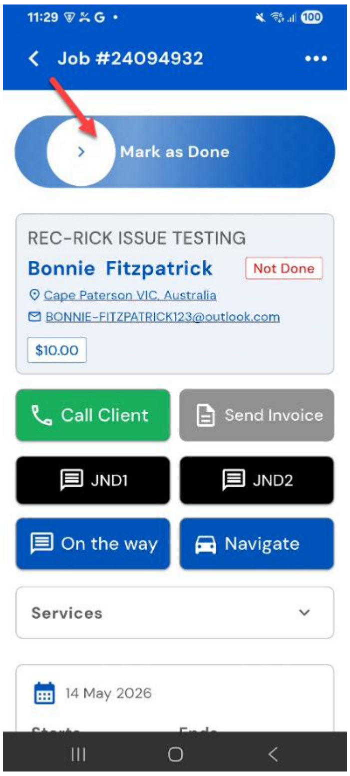


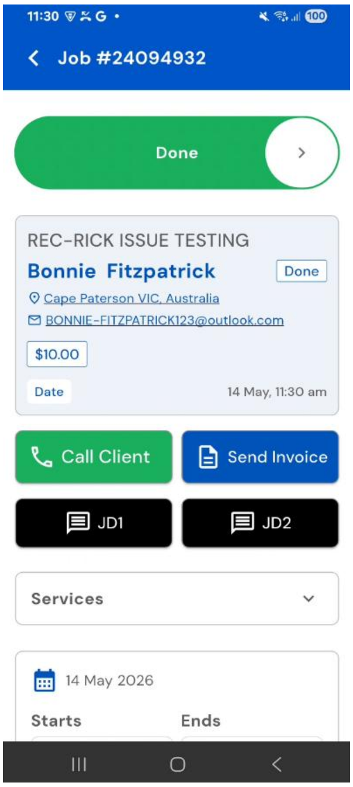
5: HOW TO MARK A JOB AS DONE

- Go to Home → Jobs
- Scroll to find the job and tap on it
- Swipe to mark as Done









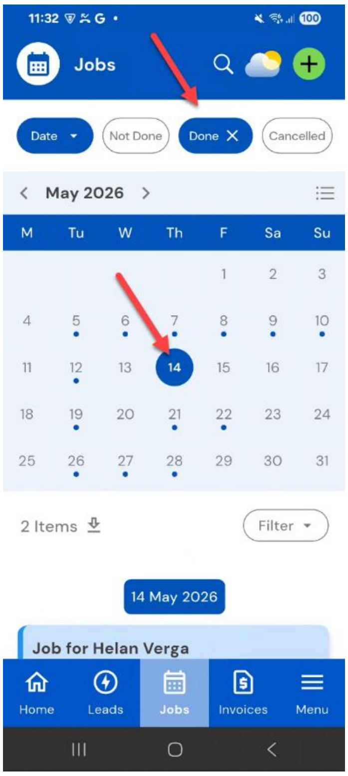
6: HOW TO SEND AN INVOICE

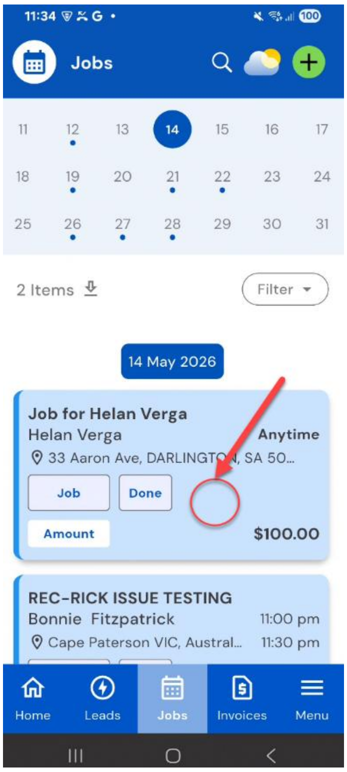
- Go to Jobs, Done, Click on the relevant Job
- Click Send Invoice → Save → Approve or Preview & Send

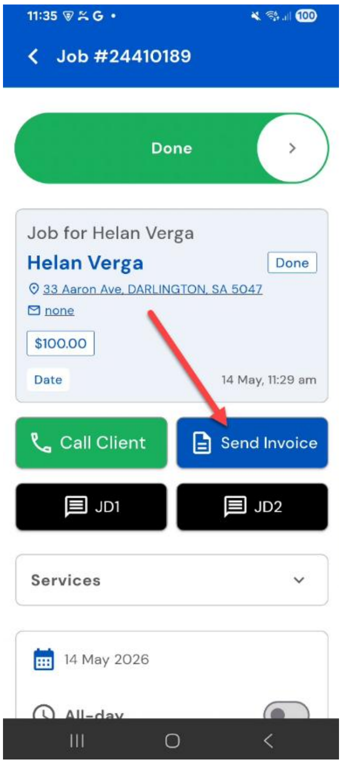
Note:

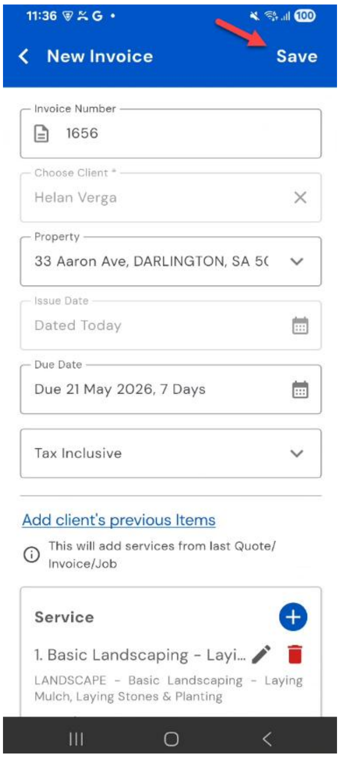
Approve: Creates and approves the invoice in the system without sending it via email.

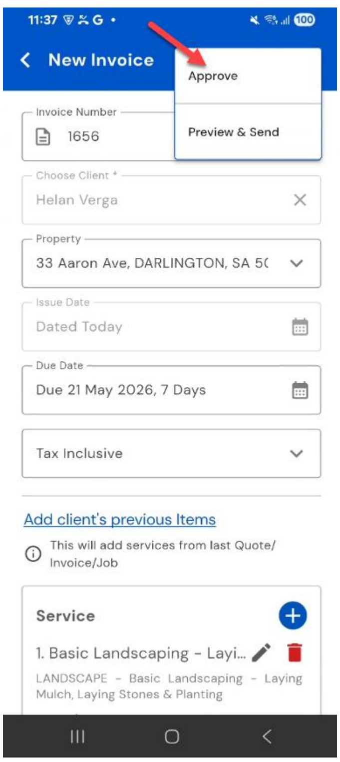
Preview and Send: Creates and approves the quote, plus sends it to the client via email

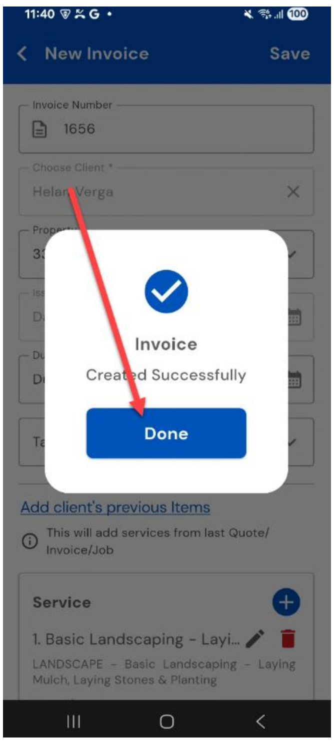


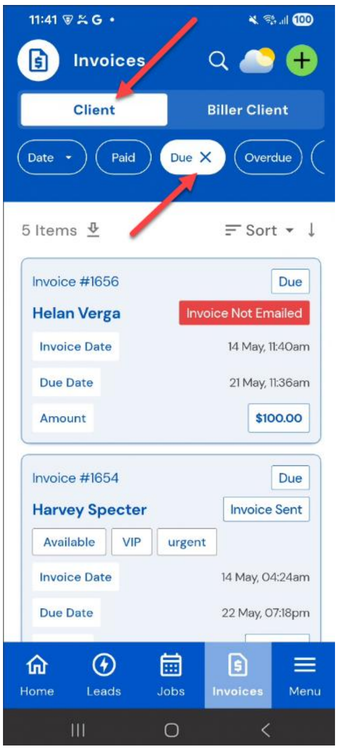






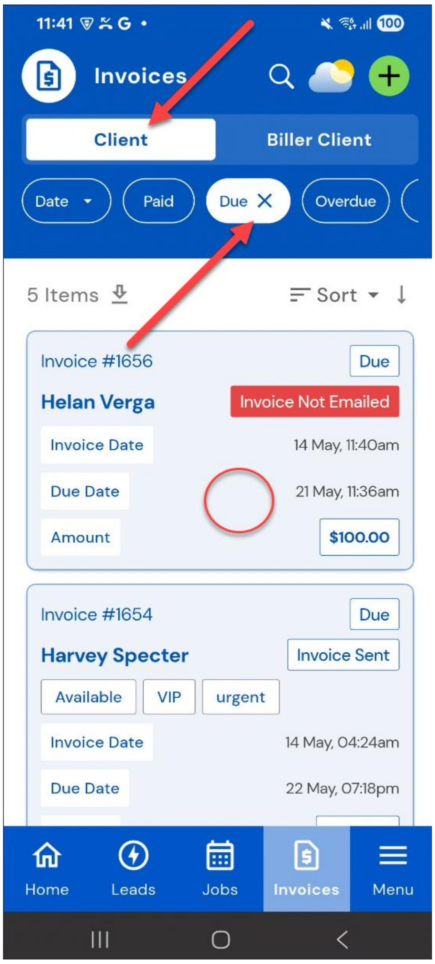


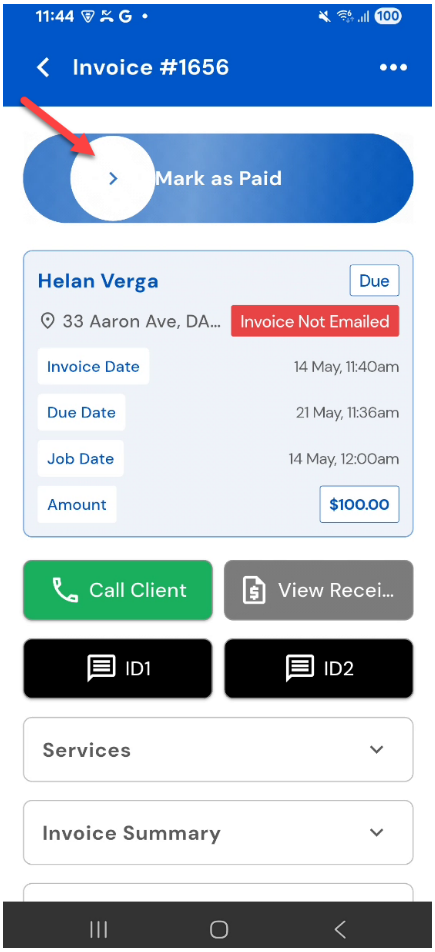


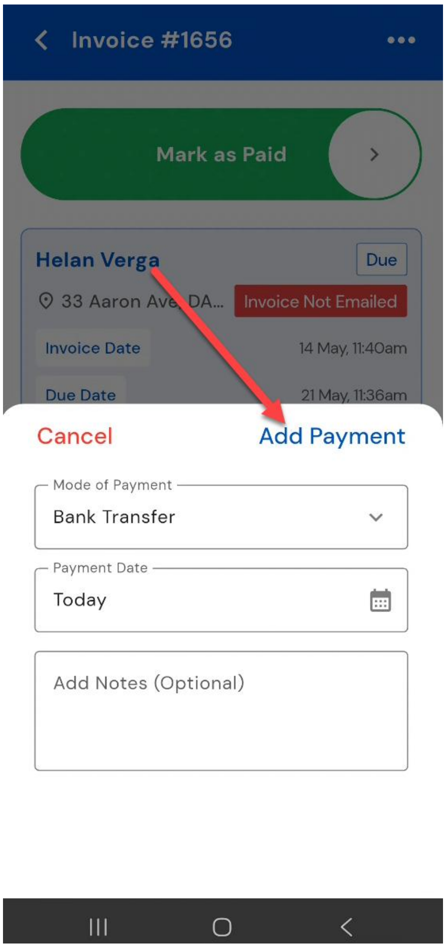


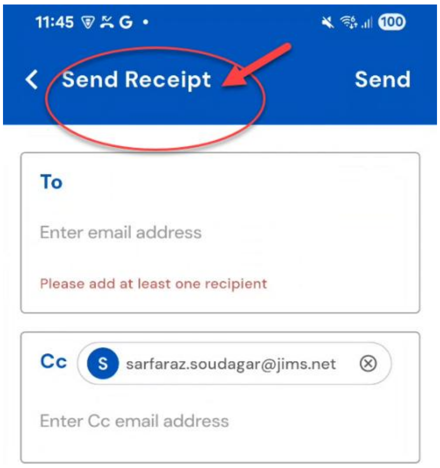
7: MARK INVOICE AS PAID

- Go to Invoices → Due → Click on relevant invoice
- Swipe to mark as Paid
- Select appropriate options ⟶ <u>Send</u>



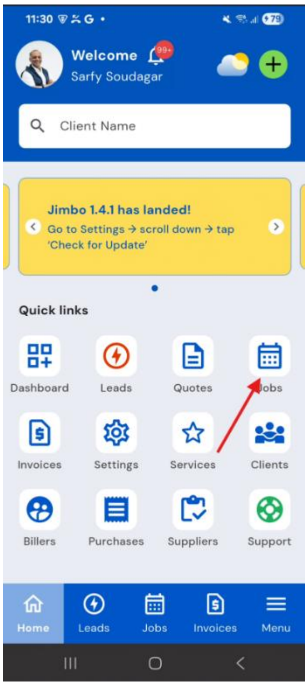


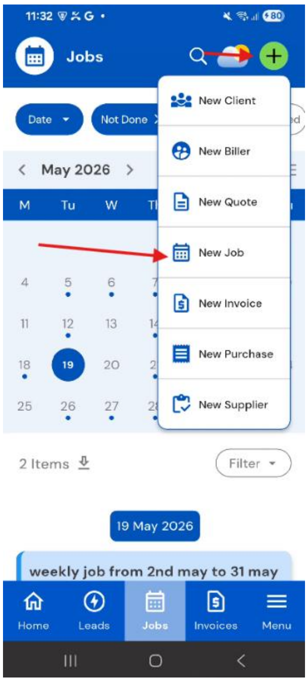


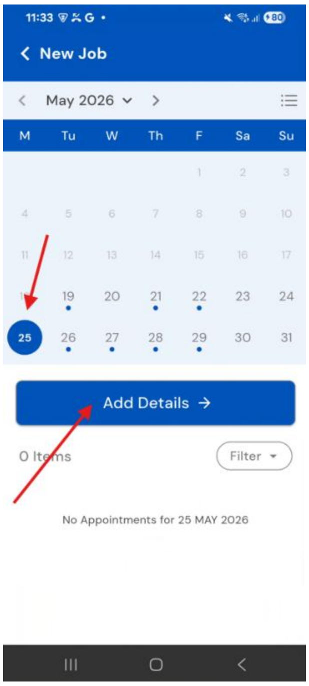


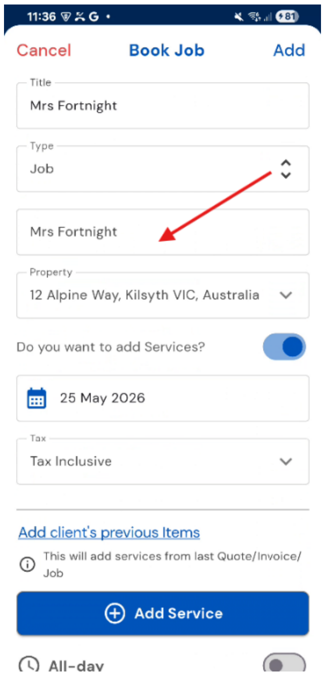
8: CREATE A RECURRING JOB

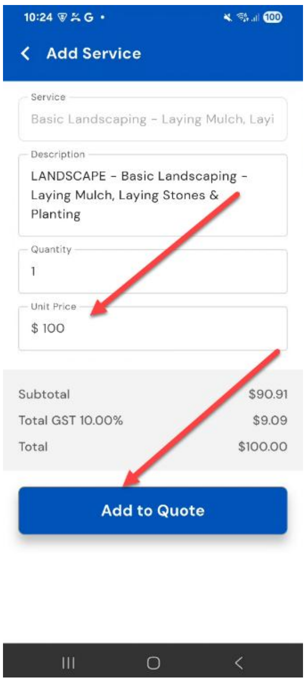
- Go to Home → Jobs
- Select Plus in top right corner (+) → New Job
- Select start date for the first job → Add Details
- Select Customer and fill out the details of the booking and Add Service
- Select the appropriate date range, e.g. fortnightly
- Select end date for this job – e.g. 2 years (can be extended for as long as needed or adjusted later) and Click Add
- Go back to Jobs and select the date for the first job to see it (will now appear in the sequence, e.g fortnightly)

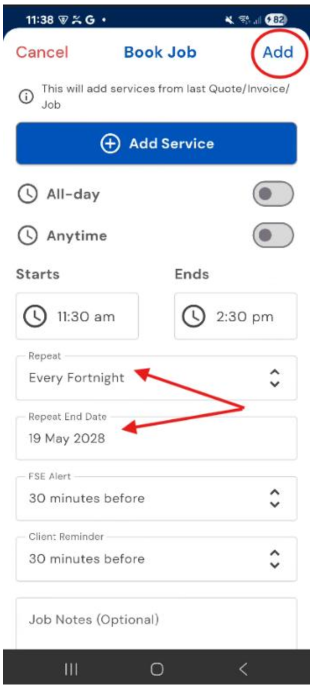


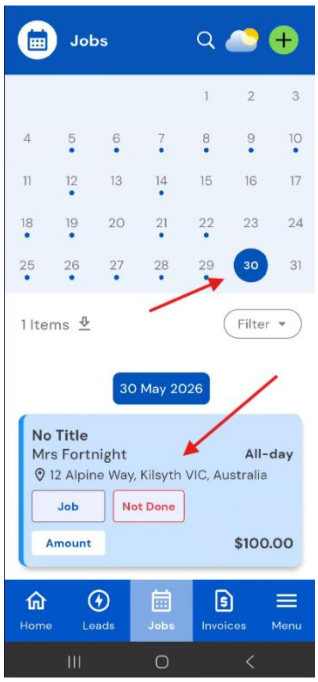






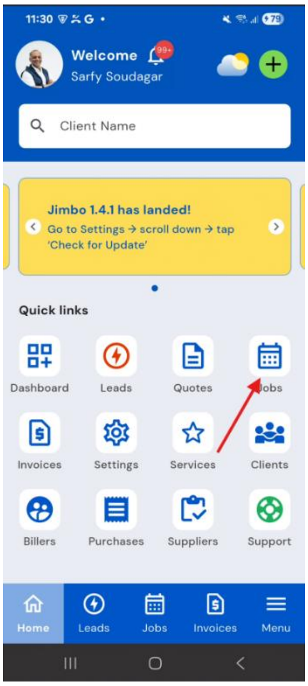


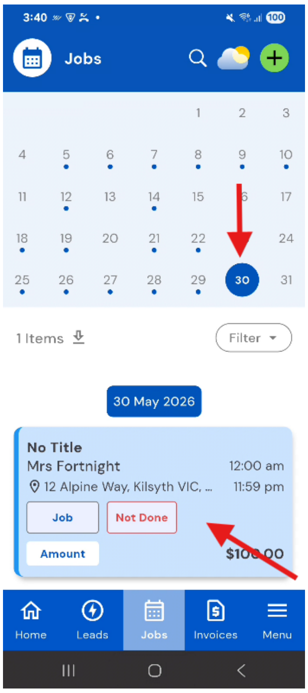


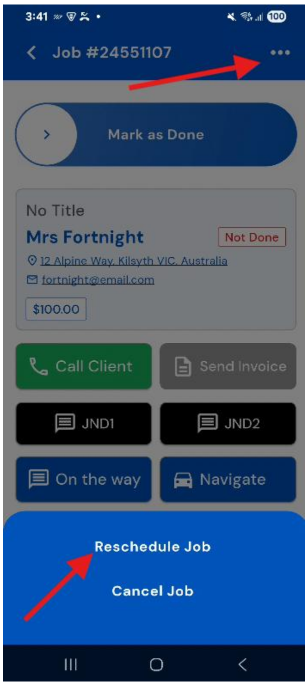


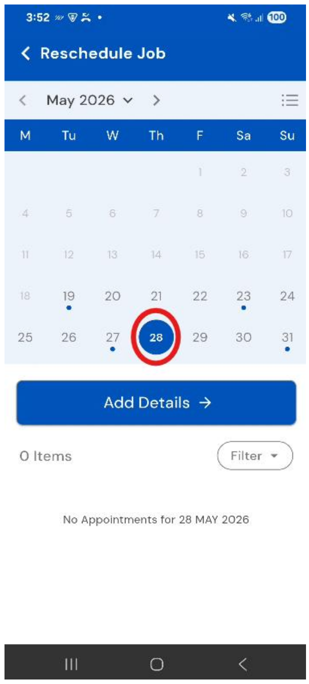
9: RECHEDULE A JOB

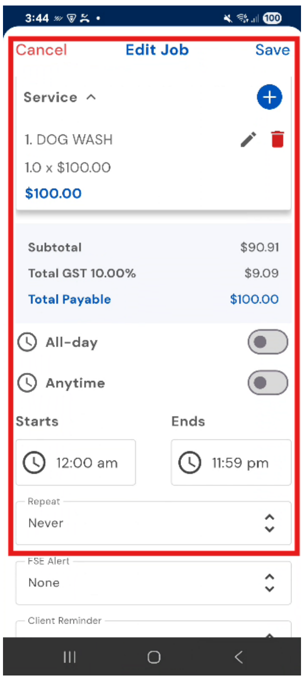
- From home, select Jobs
- Choose job from calendar to be rescheduled
- Press the 3 dots at the top right of your screen (...) → Reschedule Job
- If the job is recurring, you have the option to edit just the one occurrence or all
- Choose new date to reschedule the job on
- Press ‘Add Details’
- Scroll down to see the time/date options that can be edited
- Press ‘Save’ at the top right

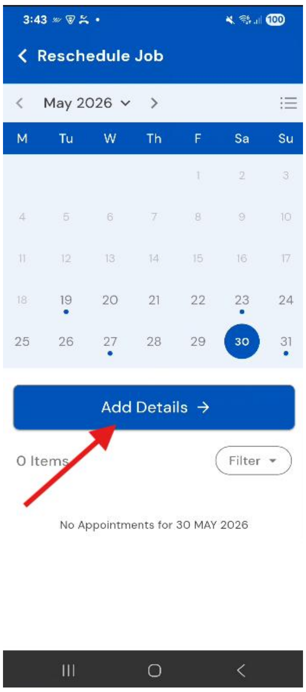






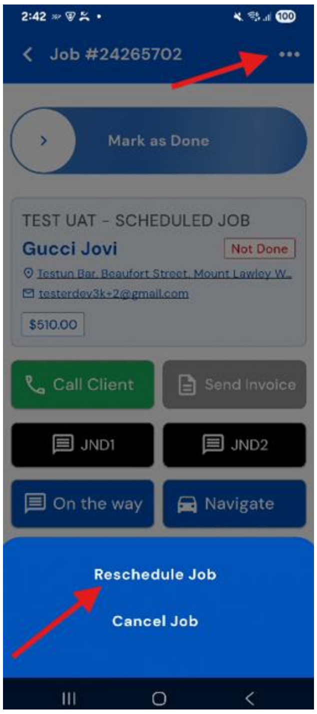


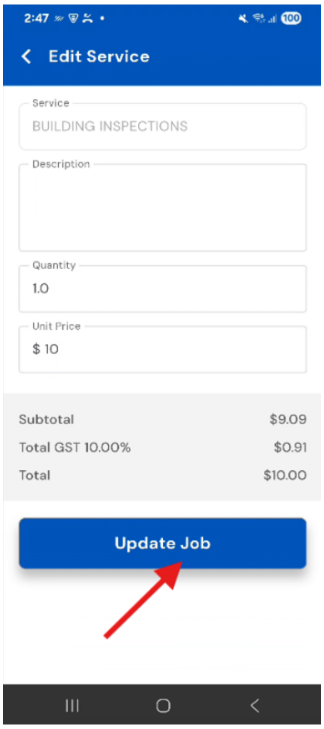


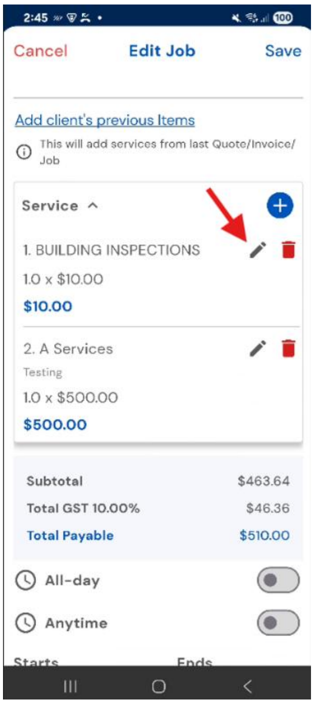


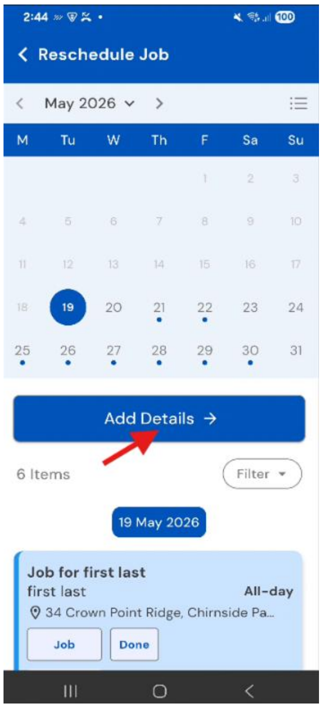
10: EDIT A JOB

- Press the 3 dots at the top right of your screen (...)
- Select 'Reschedule Job"
- Press 'Add Details'
- Scroll down a little and you'll find the services, where you can either add/remove/edit items
- Click the pencil icon to edit and 'Update Job' when you're done



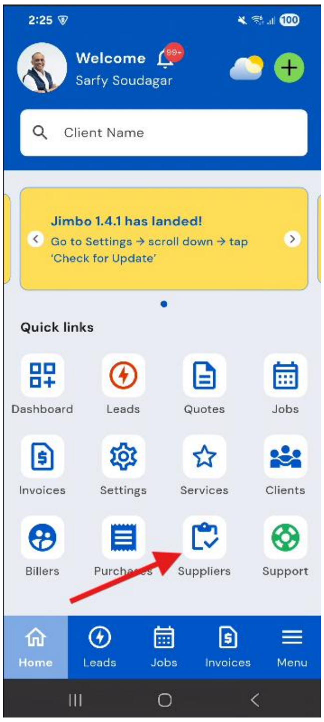


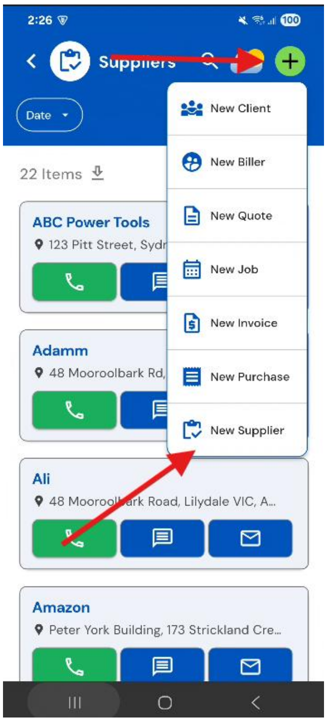


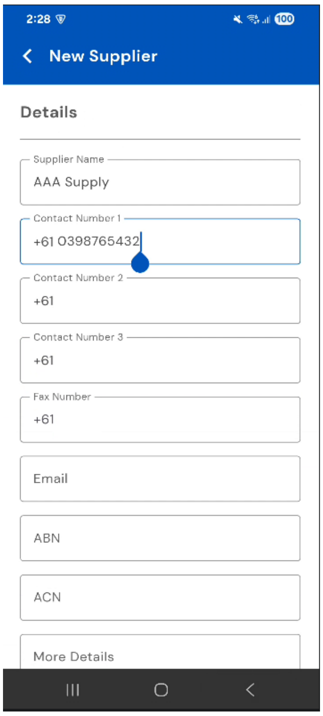


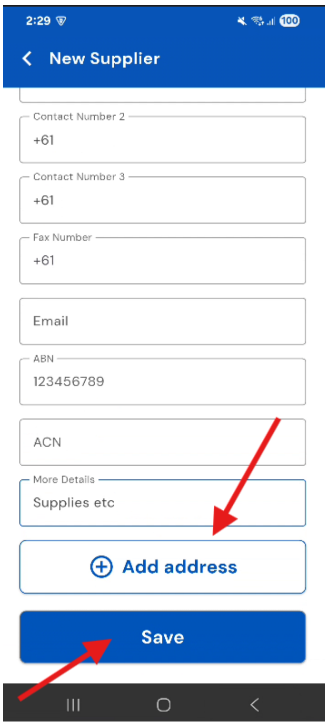
11: ADD A SUPPLIER

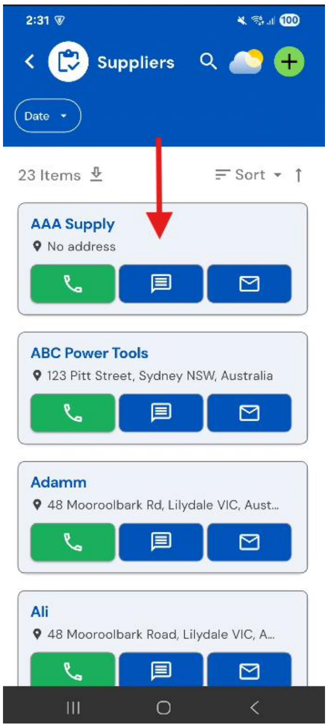
- From Home, Press Suppliers
- Select the Plus icon at the top right → New Supplier
- Fill in relevant Details
- Add Address if applicable
- Save
- The new item will now appear in Suppliers





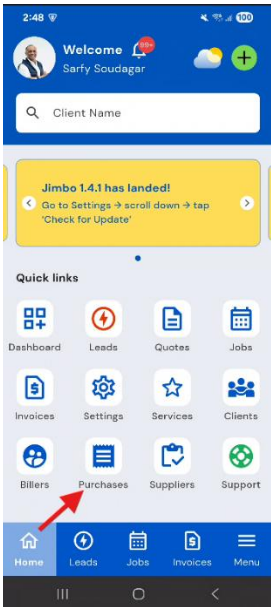


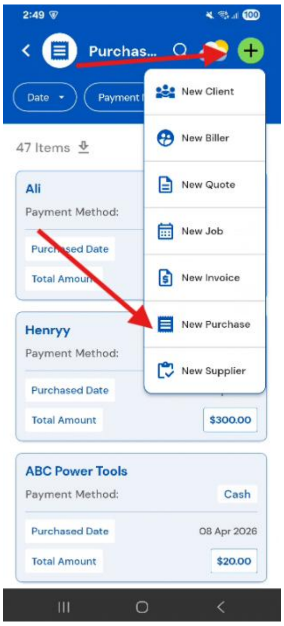


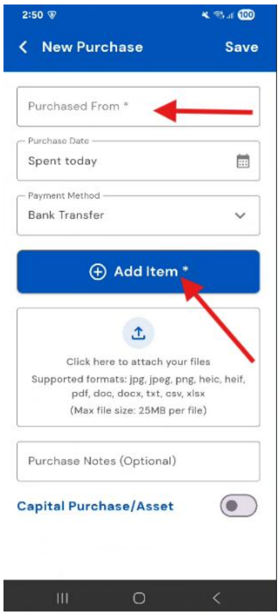


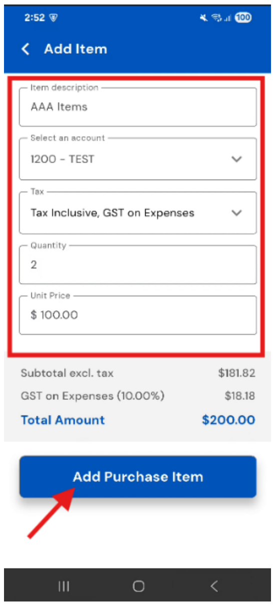
12: ADD A PURCHASE

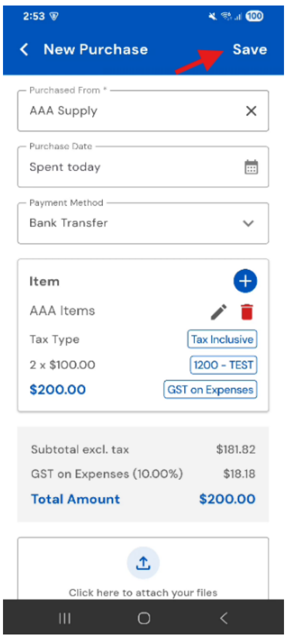
- From Home, Press Purchases
- Select the Plus icon at the top right → New Purchase
- You can attach the Purchase to an existing Supplier from here
- Add date, attach files and add any notes
- Press Add Item
- Enter description/account/GST/Quantity and unit price
- Press Add Purchase Item
- When ready, press save at the top right

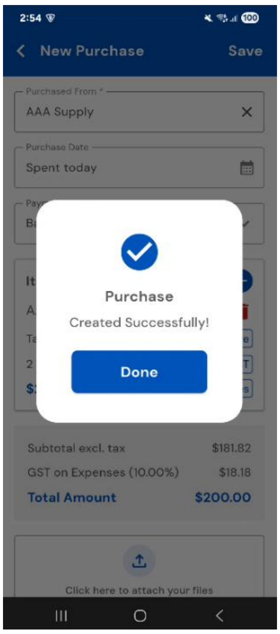


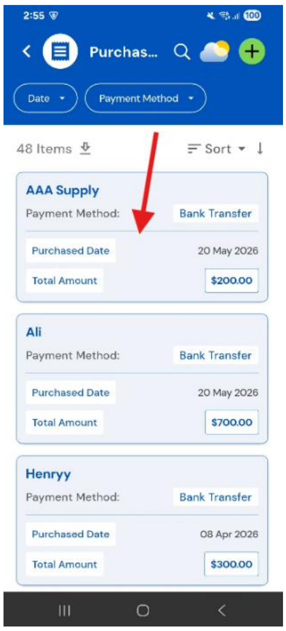






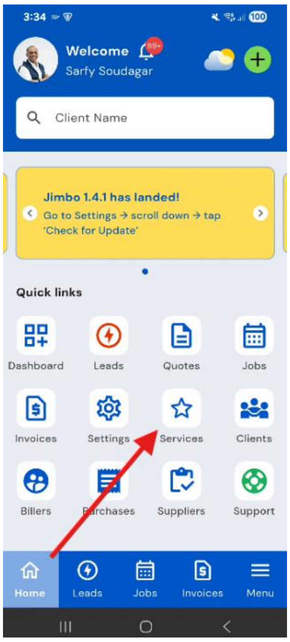


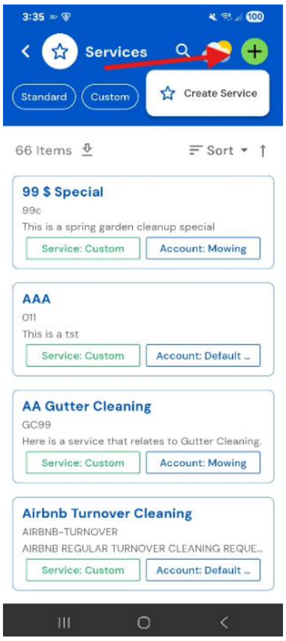


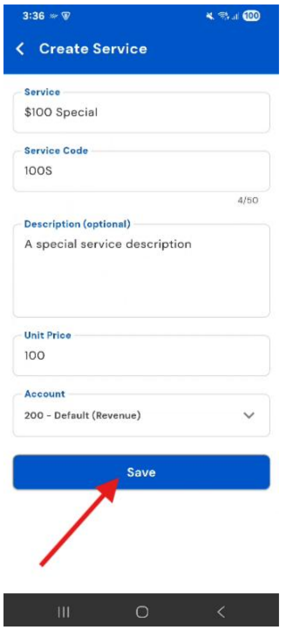


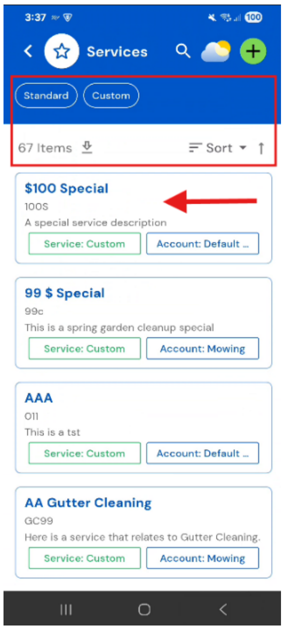
13: ADD A CUSTOM SERVICE

- From Home, Press Services
- Select the Plus icon at the top right → Create Service
- Enter service name/code/description/unit price/account
- Press Save
- The new custom service can now been seen on the page – use filters to search



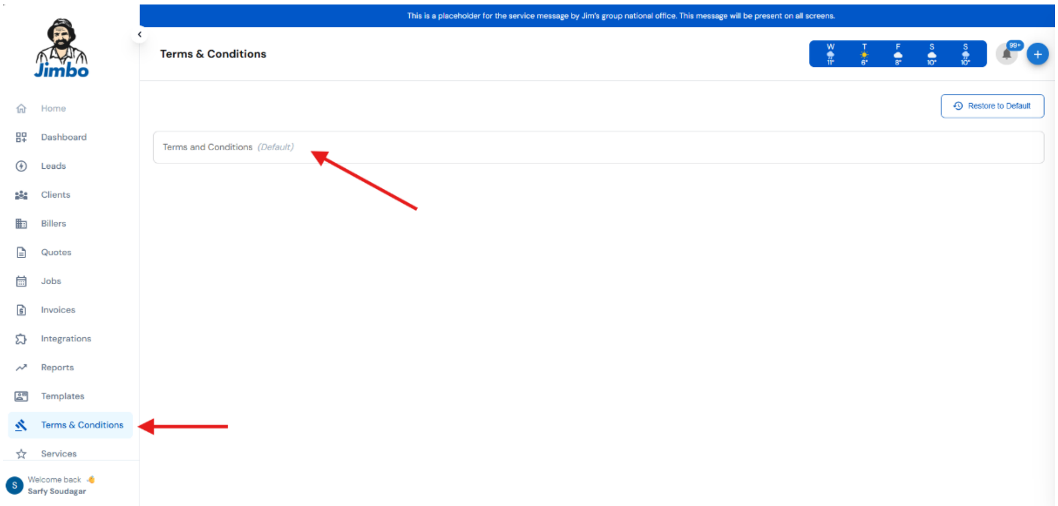


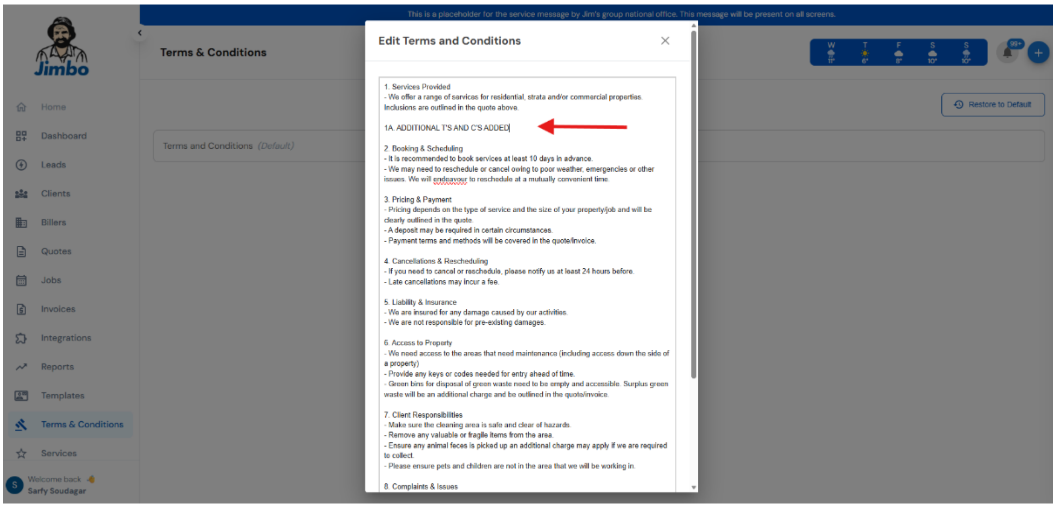


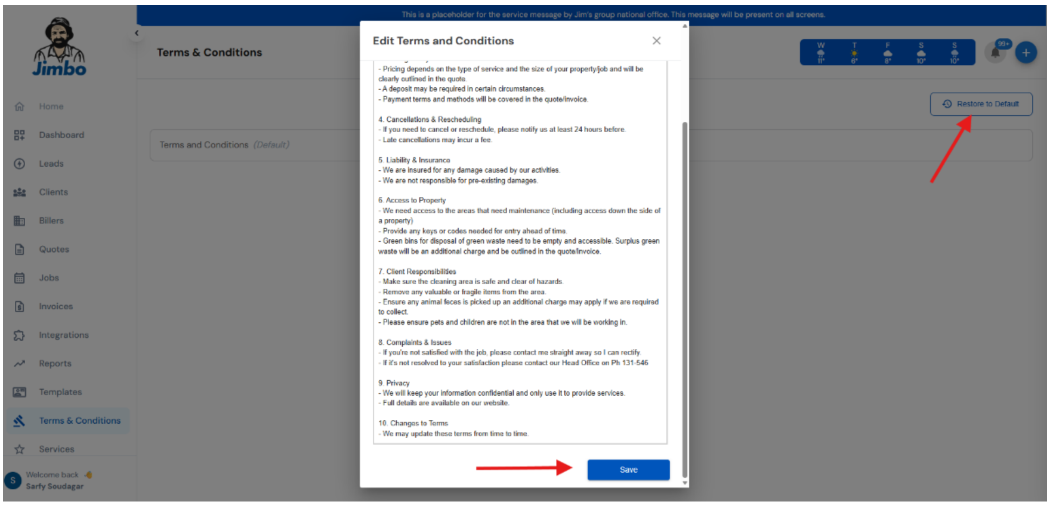


14: EDIT TERMS AND CONDITIONS (WEB/DESKTOP ONLY)

- From the Home Dashboard, select ‘Terms and Conditions’ on the left
- Click the ‘Terms and Conditions’ field toward the top of the page
- Enter any relevant changes into the text box and press Save when done
- Press ‘Reset to Default’ to revert to the default ‘Terms and Conditions’



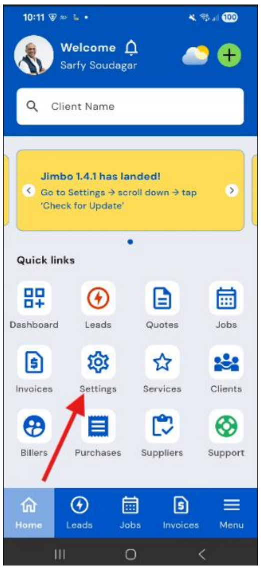


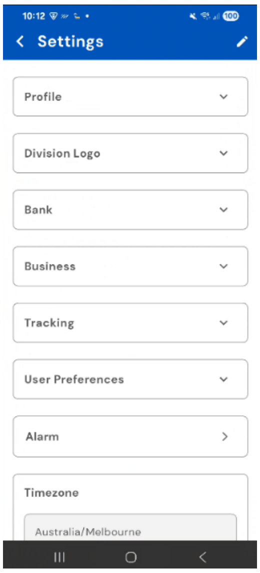


SETTINGS

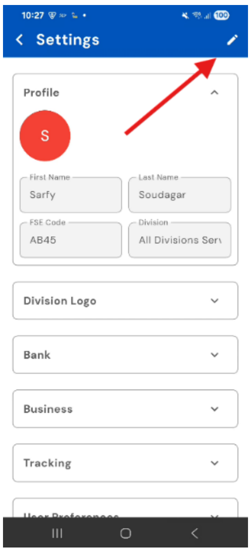
To find Settings:

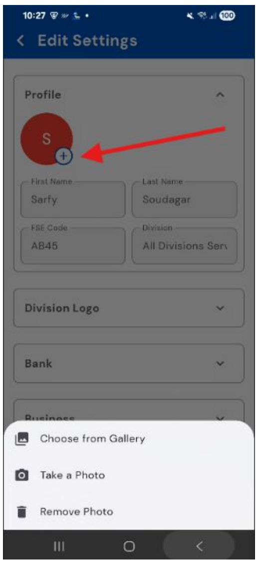
- From Home, select “Settings”



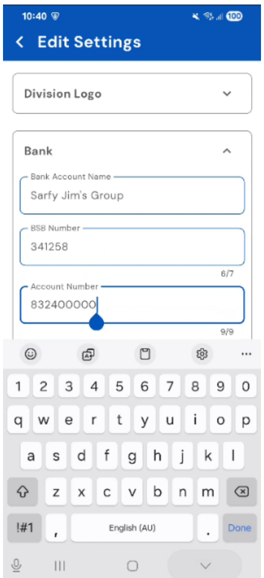


a) Profile:
   - Edit by tapping top right pencil icon
   - Profile picture can be changed from here
   - Name/Code/Division cannot be edited
   -

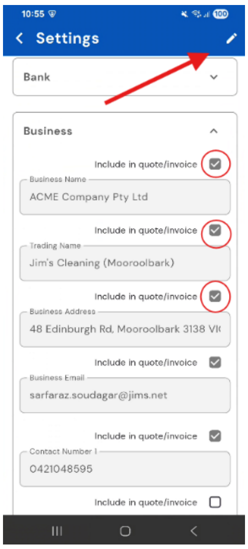


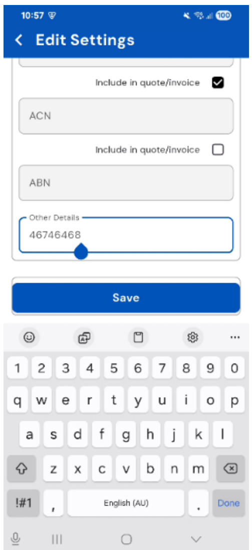


b) Bank:
   - Tap the fields to edit the information

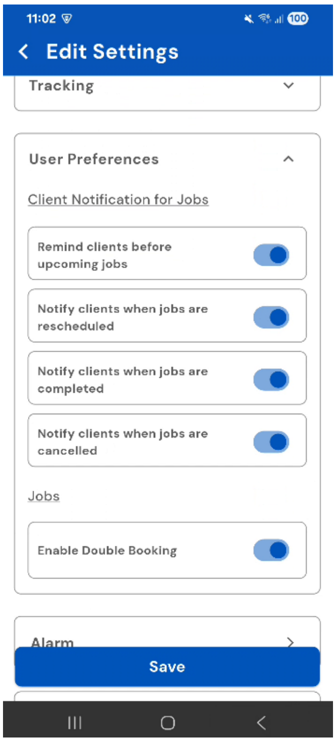


c) Business:
   - Tick/Untick items to either include or exclude from showing on invoices
   - Text box to include Other Details – e.g. Insurance info, press Save

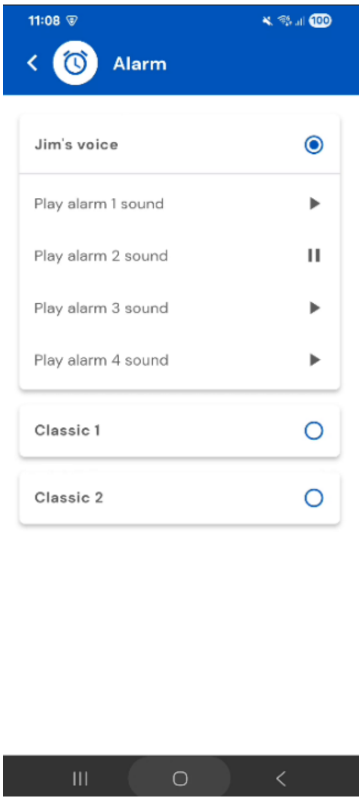




d) User Preferences:
- Toggle items to switch on/off notifications sent to clients
- Includes option to allow double bookings of jobs



e) Alarms:
- Switch between alarm sounds



Please note: Division Logo, Time zone, GST Rate cannot be edited

Jimbo Training Manual