Jobledgerhq

SERVICE CRM & JOB MANAGEMENT

Complete How-To Guide

Every area of Jobledgerhq, step by step

English edition · 10/2026

jobledgerhq.com

TAP ANY TOPIC TO JUMP TO IT.

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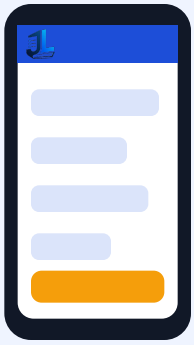
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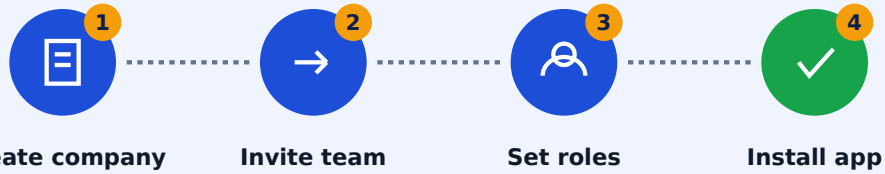
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Getting started & team



How it works



Questions & answers

How do I set up my company?

After signing up you'll see Company setup. Enter your company name, phone, default tax rate, markup and payment terms. You can change these later in More → Settings.

How do I add my logo?

Go to More → Settings → Company and upload your logo. It appears on estimates, change orders, invoices and customer links.

How do I invite my team?

Go to More → Settings → Team, enter their email and pick a role. They get an email invite link. Your plan sets how many users you can have.

What can each role do?

Owner and Admin: everything, including settings and billing. Office: jobs, customers, estimates, change orders, invoices, no settings or billing. Field: assigned jobs, daily logs, photos and time only, never costs, margins or invoices.

Can I use Jobledgerhq in Spanish?

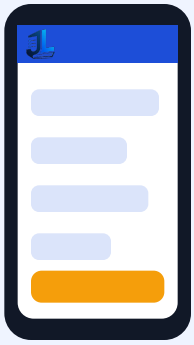
Yes. Tap EN / ES in the top bar to switch the whole app. Each team member can also have their own language set in Settings → Team. On the homepage, tap "Ver en español" at the top to read it in Spanish; that choice carries into sign-up.

How do I install Jobledgerhq on my phone?

Open the site in your phone's browser. iPhone: tap Share → Add to Home Screen. Android: tap the menu → Install app. It will open full screen like a normal app.

SECTION 2

Jobs & customers



How it works



Questions & answers

How do I create a job?

Tap Jobs → New job. Pick or add a customer, name the job, add the address, choose the contract type (fixed price, cost plus or time & materials) and the contract amount.

How do I add a customer?

Go to More → Customers → New customer, or add one while creating a job.

How do I assign crew to a job?

Open the job and add team members. Field users only see the jobs they're assigned to.

Where do I see how a job is doing financially?

Open the job. Office and admin users see the original contract, approved change orders, current contract, billed and collected amounts.

How does the jobsite QR code and Scope of Work work?

Every job gets its own private Scope of Work page and QR code. Open the job and scroll to the Jobsite Scope of Work card. Anyone who scans the code with a phone camera sees the scope grouped by trade, approved change orders and site notes. No app or login needed.

Jobs & customers

What do subcontractors and trades see on the Scope of Work?

Only what to build: scope by trade and category, approved extra work and site notes. Prices, costs, margins and contract totals are removed on the server, so trades never see money.

How do I print the jobsite flyer or share the link?

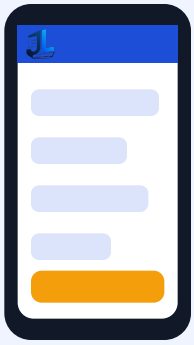
On the Jobsite Scope of Work card, tap Print jobsite flyer for a letter-size page with the job name and a large QR code to post in the trailer or on the site board. Or tap Copy link for trades and text it to your subs.

How do site notes and crew alerts work?

Office and admin users type gate codes, parking, dumpster location and safety rules into Site notes, then tap Save & notify crew. Everyone assigned to the job gets an alert, and the Scope of Work page updates right away.

SECTION 3

Daily logs, photos & offline



How it works



Questions & answers

How do I log a day?

Tap Log → Log a day. Pick the job; weather fills in automatically. Select the crew, describe work done, issues and visitors, and add photos. Tap Save.

Can I talk instead of type?

Yes. Tap the microphone button next to any notes field and speak. On Pro, use Describe your day to have the AI organize your notes, review them before saving.

What happens with no signal?

Your log and photos save on the phone and show as waiting to sync. They upload automatically once you're back online. Keep the app open or reopen it later to finish syncing.

Can my customer see the log?

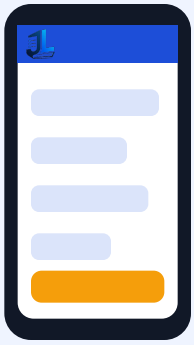
Only if you turn on Share with customer for that log. Internal notes stay private.

How do I clock in and out?

Use the Clock in button on the job or the Time page. Tap again to clock out. Weekly timesheets are under More → Time.

SECTION 4

Estimates & e-signatures



How it works



Questions & answers

How do I build an estimate?

Tap Estimates → New estimate and choose the job. Add groups (like Demo, Framing) and line items. Use Tab and Enter to move between cells. Type to search your cost catalog, or save a new line to the catalog.

How do I send it for signature?

Open the estimate and tap Send. Email it to the customer or copy the link to text it. You can also download a PDF.

Can I hide line prices from the customer?

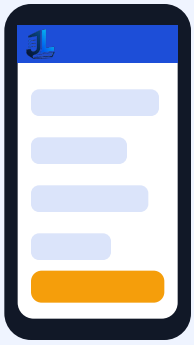
Yes. Turn off Show line prices before sending; the customer sees descriptions and the total only.

What happens when they sign?

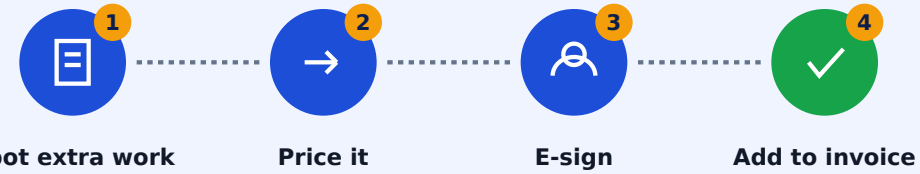
The estimate is marked Approved, you get a notification, and their name, signature, time and IP address are saved. You can then invoice from it.

SECTION 5

Change orders



How it works



Questions & answers

How do I create a change order?

Go to More → Change orders → New, or open a job. Add the description, reason, line items and schedule impact, then send it for signature just like an estimate.

What are AI change-order flags?

On Pro, when a daily log mentions extra work (e.g. 'owner asked for 4 more outlets'), Jobledgerhq flags it. Tap Draft change order to start one, you always set the prices.

How do approved change orders affect the contract?

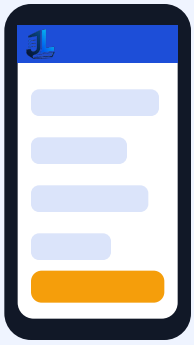
Current contract = original contract + approved change orders. It updates automatically on the job.

How do I bill a change order?

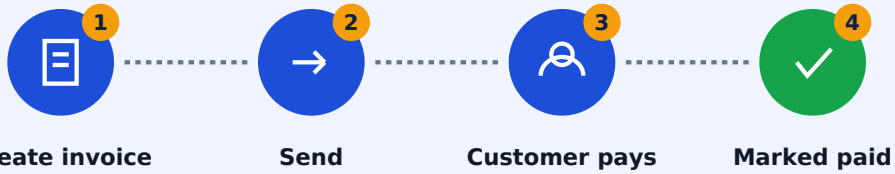
Open the approved change order and tap Add to invoice. It can only be billed once.

SECTION 6

Invoices & payments



How it works



Questions & answers

How do I create an invoice?

Tap Invoices → New invoice. Bill a percentage or fixed amount of an approved estimate, add approved change orders, or enter your own lines.

Why can't I invoice more?

For fixed-price jobs, Jobledgerhq won't let you bill past the current contract value. Add an approved change order to raise it.

How do customers pay online?

On Pro, connect your payout account in Settings → Payments. Customers then see Pay now on the invoice link. Payments mark the invoice paid automatically.

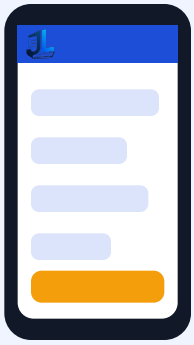
How do I record a check or cash payment?

Open the invoice and tap Record payment. Enter the amount, method and reference.

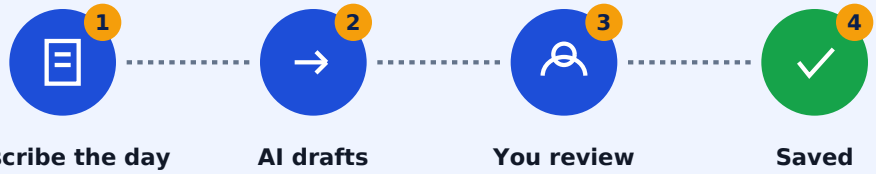
Are reminders automatic?

Yes, if reminders are on. Customers get emails 3 days before the due date, on the due date, and 7 and 14 days after.

AI assistant & Ask Jobledgerhq



How it works



Questions & answers

What can I ask Ask Jobledgerhq?

Questions about your jobs ('What did we do at Oak St this week?', 'Which invoices are overdue?') and how to use the app ('How do I send a change order?'). Open it from the chat button in the app.

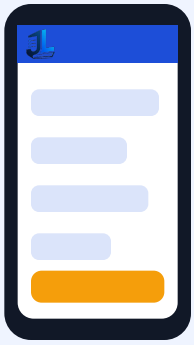
Which plan includes AI?

AI features are included on Pro and Pilot plans.

Will AI change my data on its own?

No. AI suggestions are only saved after you review and confirm them, and it never makes up prices.

QuickBooks Online



How it works



Questions & answers

How do I connect QuickBooks?

Owners and admins go to More → Settings → Integrations and click Connect to QuickBooks. Sign in with your normal QuickBooks Online login, pick your company, click Connect, and you'll land back in Jobledgerhq. No API keys or developer account are needed.

What gets sent to QuickBooks?

When you click Sync now, sent, partly paid, overdue and paid invoices are copied with their lines and tax, along with their customers and every payment recorded in Jobledgerhq (card, check, cash or ACH). Drafts and voided invoices are not sent.

Will syncing create duplicates?

No. Each customer, invoice and payment is sent only once. Customers that already exist in QuickBooks with the same name are matched instead of copied.

Can my bookkeeper connect it?

Yes. Invite your bookkeeper as an admin, or have them sign in to QuickBooks during the Connect step. Only owners and admins can connect, sync or disconnect.

QuickBooks says it needs to be reconnected. What do I do?

QuickBooks asks you to approve access again about every 100 days, or after a password change. Go to Settings → Integrations and click Reconnect.

How do I disconnect QuickBooks?

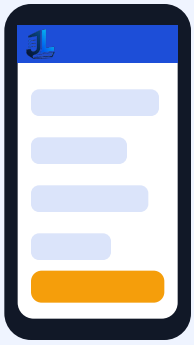
Settings → Integrations → Disconnect. Nothing already in QuickBooks is deleted, and Jobledgerhq stops sending new items.

Does QuickBooks Desktop work?

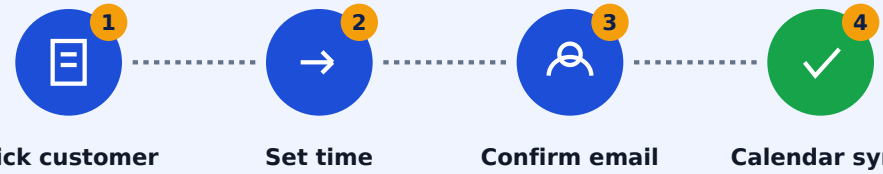
The live connection works with QuickBooks Online only. Desktop users can use the CSV export on the Invoices page.

SECTION 9

Appointments & calendar sync



How it works



Questions & answers

How do I book an appointment?

1. Go to More → Appointments and tap New appointment. 2. Pick a customer, or choose + Add new customer to create one while booking. 3. Choose the type (site visit, estimate, etc.), date, time, address and who's assigned. 4. Tap Book appointment. You can also book from a lead with Book visit.

Does the customer get a confirmation?

Yes, if they have an email and Send confirmation is checked. They get a branded email with the date, time and address, plus a calendar file to add it to their own calendar.

What if two visits overlap?

Jobledgerhq warns you when the assigned person already has a visit at that time. You can still book if you choose.

How do I mark a visit done, cancel it or get directions?

On the appointment card: tap Done when finished, the arrow button for directions, or open Past & closed to see completed and canceled visits.

How do I add one appointment to my phone's calendar?

Tap the calendar button on a scheduled appointment, then choose Google Calendar (opens with everything filled in) or Download .ics for Apple Calendar and Outlook.

Appointments & calendar sync

How do I sync all appointments to Google, Apple or Outlook?

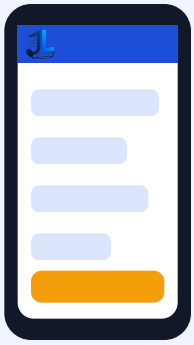
1. On Appointments, tap Sync calendar. 2. Tap Apple, Google or Outlook, or copy your private link and paste it into your calendar app as a subscription. New and changed visits show up automatically (calendar apps refresh every few hours). The link is private to you, tap Make a new link if it's ever shared by mistake.

What do field users see?

Field users only see appointments assigned to them, in the app and in their synced calendar. No prices or money details are ever included.

SECTION 10

Dashboard & navigation



How it works



Questions & answers

What does the dashboard show?

Owners, admins and office users see open jobs, money owed, overdue invoices, new website leads, pending approvals and AI change-order flags. Field users see their assigned jobs and today's work only.

How do I move around the app?

On a computer, use the left menu. On a phone, use the bottom tabs (Jobs, Log, Estimates, Invoices, More). Everything else, customers, change orders, appointments, leads, reports, settings, is under More.

How do I switch between English and Spanish?

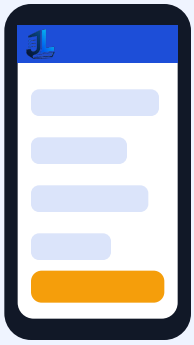
Tap the EN/ES switch at the top of the screen. Each team member's choice is saved to their own account. Names and notes you type stay exactly as entered.

Where is the How-To Guide?

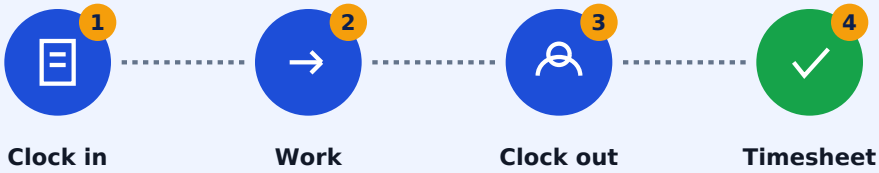
On a computer, click How-To Guide at the bottom of the left menu. You can also download the full interactive PDF guide from that page in English or Spanish.

SECTION 11

Time tracking & timesheets



How it works



Questions & answers

How does my crew clock in?

1. Open the job or the Time page. 2. Tap Clock in. 3. Tap Clock out at the end of the shift. Time is tied to the job automatically.

Can I add or fix a time entry?

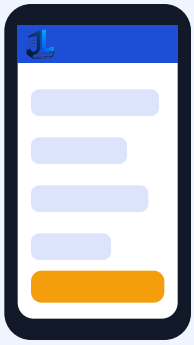
Yes. Office and admin users open Time, tap Add time or an existing entry, and change the job, date, start and end. Field users can add their own entries.

Where are weekly timesheets?

More → Time shows hours by person and by week. Use Export to download a CSV for payroll.

SECTION 12

Website leads & quote requests



How it works



Questions & answers

How do I get leads from my website?

Go to More → Settings → Website leads. Copy your quote-request link, or the embed code for your web developer. Customers fill it in and the lead appears in Leads and on your dashboard.

What happens when a lead comes in?

You get a notification, and the customer gets an email confirming their message was received and someone will reach out.

How do I work a lead?

Open More → Leads. Move it through New, Contacted, Quoted, Won or Lost. Tap Book visit to schedule an appointment, or Convert to create the customer and job in one step.

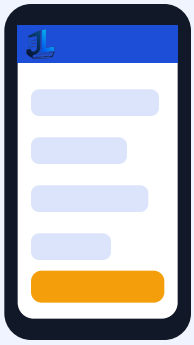
Is my lead link unique to my company?

Yes. The code at the end of your link belongs only to your company, and leads go only to your account. Customers see your logo, colors and phone number. The jobledgerhq.com address is just where the form is hosted; use the embed code to put the form right on your own website.

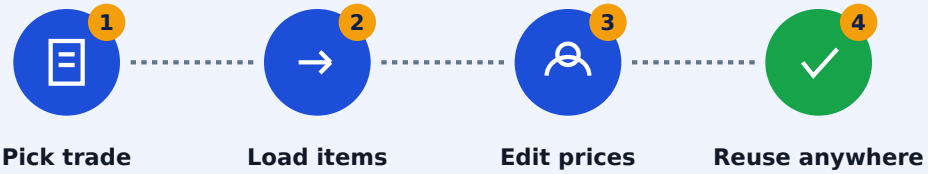
Can my web developer send leads directly?

Yes. Settings → Website leads shows a private API address and an example request. Treat that link like a password.

Line Items catalog



How it works



Questions & answers

What is the Line Items catalog?

Your saved list of items and categories (labor, materials, subcontractors, equipment) used when building estimates and change orders. Find it under More → Line Items.

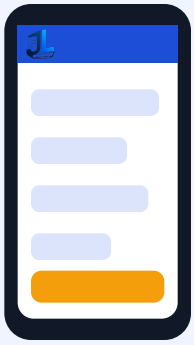
How do I load starter items for my trade?

Open Line Items and tap Load trade pack. Pick your trade (remodeling, electrical, plumbing, roofing and more). Items come in with zero cost so you can enter your own prices.

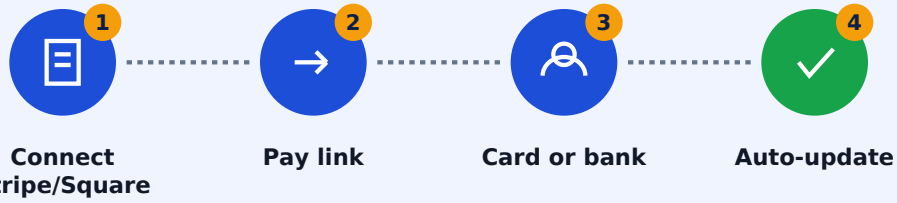
Can I upload my own list?

Yes. Tap Import, download the template, fill it in with your items, and upload it back.

Online payments: Stripe & Square



How it works



Questions & answers

Which online payment options are there?

Stripe (card and bank) and Square (card). Connect either one, or both, in More → Settings → Payments. You can always record cash, check, Zelle, Venmo or Cash App by hand.

How do I connect Square?

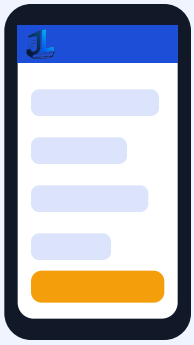
Owners and admins go to Settings → Payments and tap Connect Square. Sign in to Square and approve. Invoices then show a Pay with Square button.

When is the invoice marked paid?

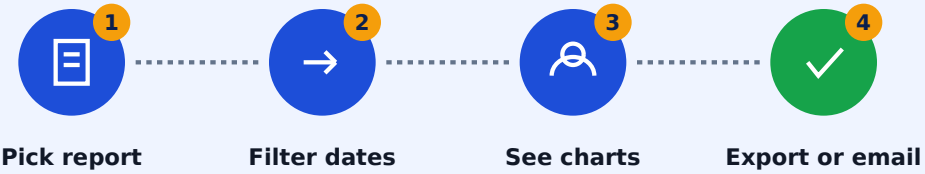
As soon as Stripe or Square confirms the payment. The paid amount and status update by themselves, and a payment is never counted twice.

SECTION 15

Reports, messages & notifications



How it works



Questions & answers

What reports are available?

More → Reports shows revenue, collections, job profit and aging. Download CSV on every plan; charts, PDF and email reports are on Pro.

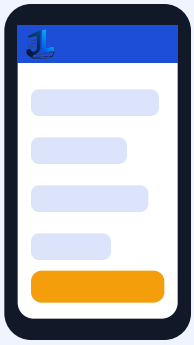
How do I message my team?

Tap the message button at the top of the screen to chat with your team or about a specific job.

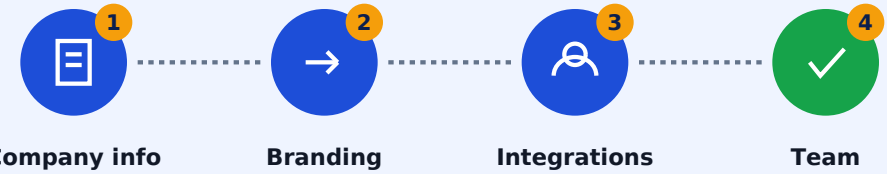
Where are my notifications?

The bell at the top shows signatures, payments, new leads, appointment assignments and AI flags. Tap one to open it.

Settings & integrations



How it works



Questions & answers

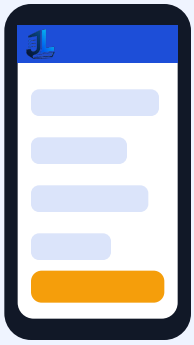
What's in Settings?

Owners and admins manage Company (logo, brand color, tax, markup, terms), Team, Payments, Website leads, QuickBooks, Referrals and Subscription.

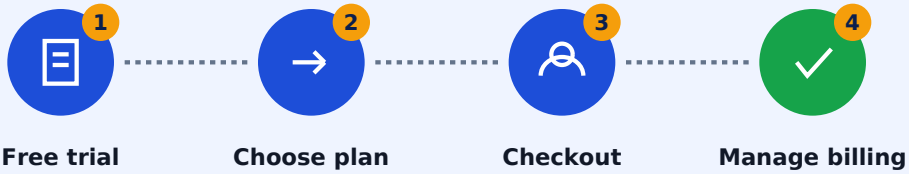
How do referrals work?

Settings → Referrals has your referral link. When a contractor you refer pays their first month, you get 30 days of your plan free.

Account & billing



How it works



Questions & answers

How do I change plans or update my card?

Owners and admins go to More → Settings → Subscription.

What if my subscription lapses?

Your data is never deleted. The account becomes read-only until you renew.

How do I give feedback or get help?

Email support@jobledgerhq.com with questions or if something isn't working, include the page and what you tried. You can also ask Ask Jobledgerhq how to do something.



Need help? Ask Jobledgerhq in the app or email support@jobledgerhq.com