JOBLEDGERHQ

CLIENT TRAINING GUIDE

Quick Start Guide

Get your company running in Jobledgerhq in about 30 minutes.

- ~30 minutes
- 8 simple steps
- English & Español

Your road map

Follow these steps in order. Each one builds on the last, from company setup to getting paid.

1. Install the app
2. Set up your company
3. Invite your team
4. Add customers and jobs
5. Send an estimate
6. Log the work every day
7. Handle extra work with change orders
8. Invoice and get paid

Setup in 8 steps

Get your company running in Jobledgerhq in about 30 minutes.

1 Install the app

Open www.jobledgerhq.com on your phone. iPhone: Share → Add to Home Screen. Android: menu → Install app. It opens full screen like a normal app.

2 Set up your company

Enter your company name, phone, tax rate, markup and payment terms. Upload your logo and pick your brand color in More → Settings → Company.

FIELD TIP
Your logo and color appear on every estimate, invoice and customer link.

3 Invite your team

More → Settings → Team. Enter each person's email, pick a role and their language (English or Spanish). They receive an email invite.

4 Add customers and jobs

Jobs → New job. Add or pick a customer, the address, contract type and amount. Assign your crew so they see the job on their phone.

5 Send an estimate

Estimates → New estimate. Add groups and line items, then tap Send. The customer signs online — no account needed.

6 Log the work every day

Log → Log a day. Weather fills in automatically. Add crew, notes and photos. Works with no signal and syncs later.

FIELD TIP
Tap the microphone to speak instead of type.

Setup in 8 steps

7 Handle extra work with change orders

When the customer asks for more, create a change order, set the price and send it for signature. Approved changes update the contract.

8 Invoice and get paid

Invoices → New invoice. Bill part of the estimate or approved change orders. On Pro, customers pay online and the invoice updates itself.

Who sees what

	Settings & billing	Jobs & customers	Estimates & invoices	Costs & margins	Daily logs & photos	Time, checklist, chat
Owner / Admin	✓	✓	✓	✓	✓	✓
Office	✗	✓	✓	✓	✓	✓
Field	✗	✗	✗	✗	✓	✓

Owner / Admin: Everything, including settings, billing and the team.

Office: Jobs, customers, estimates, change orders and invoices.

Field: Assigned jobs, daily logs, photos, time, checklist and messages. Never costs, margins or invoices.

Crew in the field

Quick wins for your crew

- Clock in and out from the job or the Time page.
- Open the scope of work by scanning the job's QR code.
- Check off checklist items — the job can't close until all are done.
- Use Team Messages for job chat or one-on-one messages.
- Tap EN / ES in the top bar to switch language.

Need help?

Tap Ask in the app for instant answers, read the full How-To Guide, or email support@jobledgerhq.com.

→ Scan to open Jobledgerhq on your phone

Appointments & calendar

Book visits and keep every calendar in sync

1 Book an appointment

More → Appointments → New appointment. Pick a customer, or tap + Add new customer to create one while booking. Choose the type, date, time, address and who's assigned, then tap Book appointment. You can also tap Book visit on a lead.

2 Confirm with the customer

Leave Send confirmation checked. The customer gets a branded email with the date, time and address, plus a calendar file for their own calendar.

FIELD TIP
You'll get a warning if the assigned person already has a visit at that time.

3 Run the visit

On the appointment card: tap the arrow for directions and Done when finished. Completed and canceled visits move to Past & closed.

4 Add one visit to your phone

Tap the calendar button on a scheduled appointment. Choose Google Calendar (opens pre-filled) or Download .ics for Apple Calendar and Outlook.

5 Sync every visit automatically

On Appointments, tap Sync calendar. Tap Apple, Google or Outlook, or copy your private link and add it as a subscription. New and changed visits appear on their own — calendar apps refresh every few hours.

FIELD TIP
Your link is private. If it's ever shared by mistake, tap Make a new link.

6 Who sees what

Field users see only visits assigned to them, in the app and in their synced calendar. Prices and money details are never included.