Jobber Quick Guide for Fieldworkers:

Invoicing and Payments

As a fieldworker for a home service business, your role involves being out in the field and doing the work.

Jobber helps you manage your workday more easily and gives you all the client and job information you need to get to your client's home and complete your scheduled visits on time.

Each company operates differently, but here are some of the most common features and processes that a fieldworker might use day to day.

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See and Manage Your Schedule

Start your day by clocking in

*Check out this **article** for more detailed information and instructions.*

2 Tap **Clock In** to start the general timer.

No time entries for today
You can track your time by clocking in or adding a time entry

1 Start your day at work by clocking in using the general timer.

This can be found from the **Time Sheet** tab.
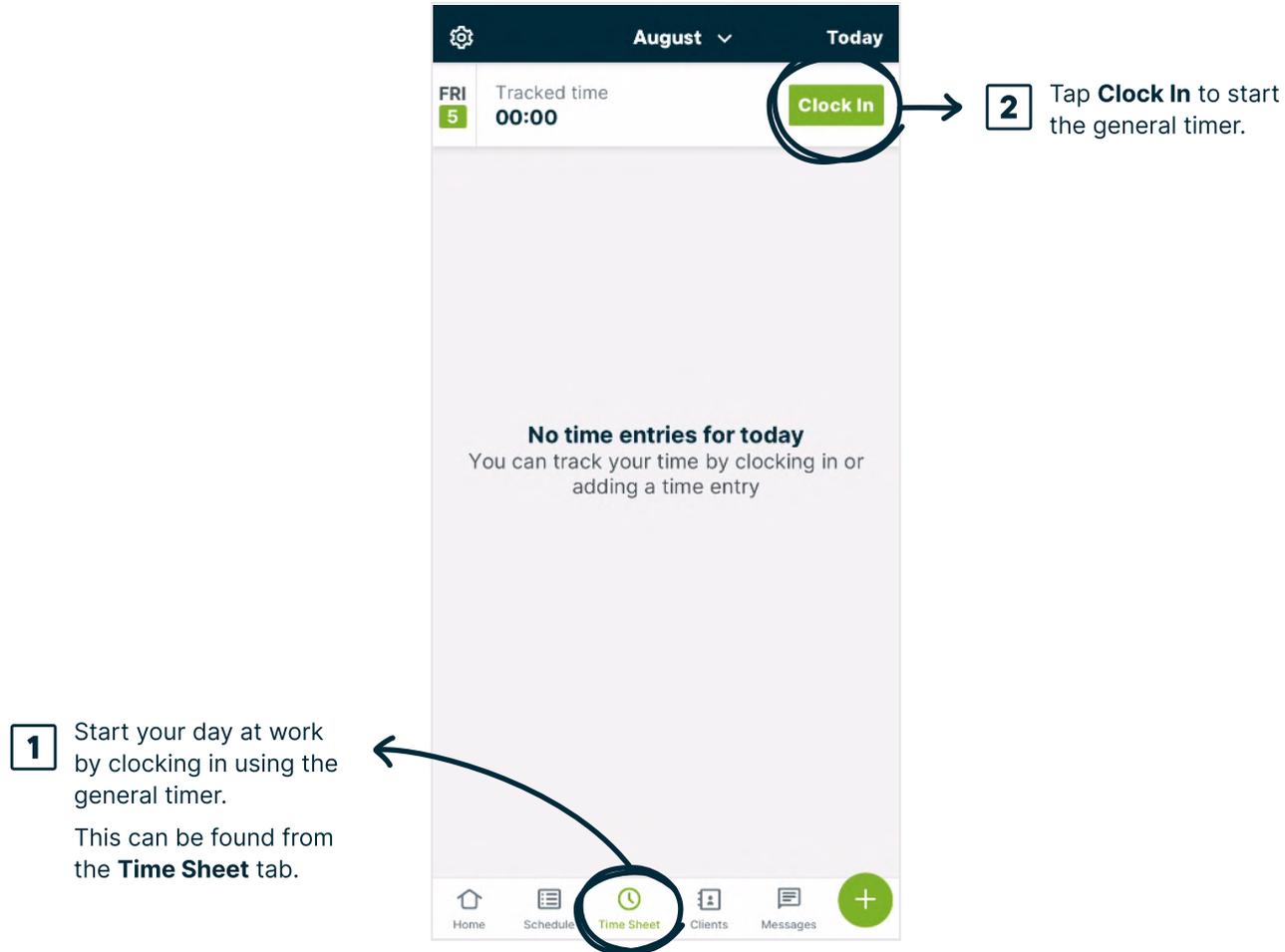
Start your day by clocking in

As you start and stop timers throughout the day, this is what your **Time Sheet** will look like.

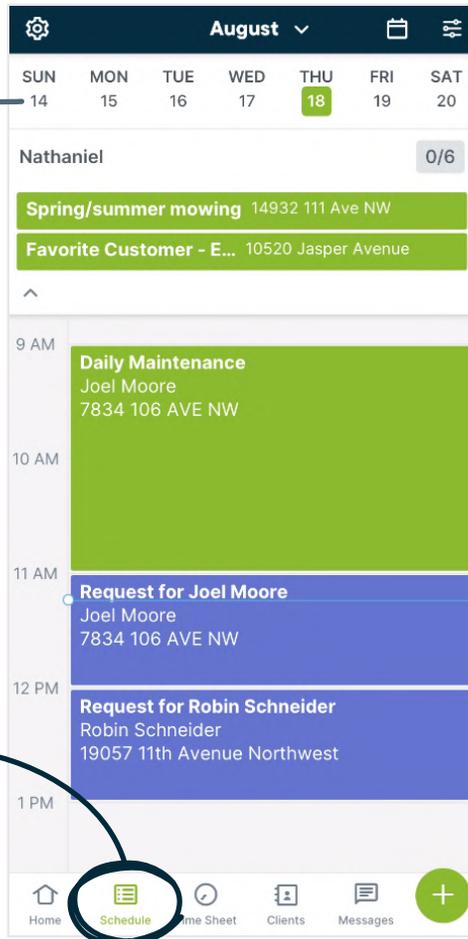Tap **Edit** on a time entry to edit the time or add notes.

View your schedule

*Check out this **[article]** for more detailed information and instructions.*

Day View
Scheduled items are blocked off based on their duration with anytime visits at the top.
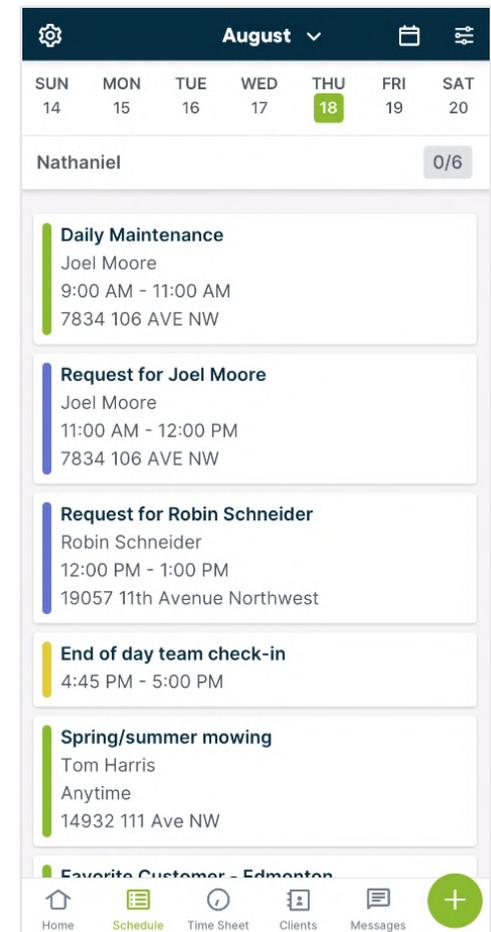
Week View
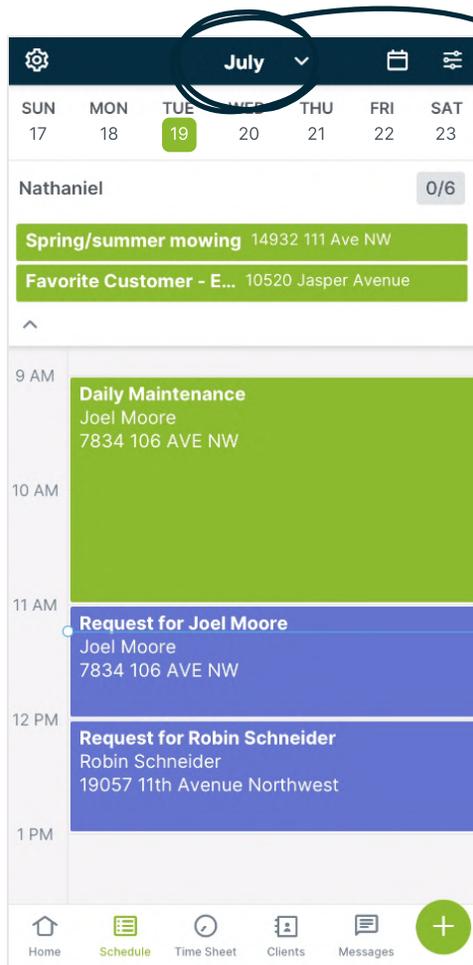Scheduled items are blocked off based on their duration with anytime visits at the top.

List View
Items appear as cards in a list. Ordered with scheduled items at the top and anytime visits below.

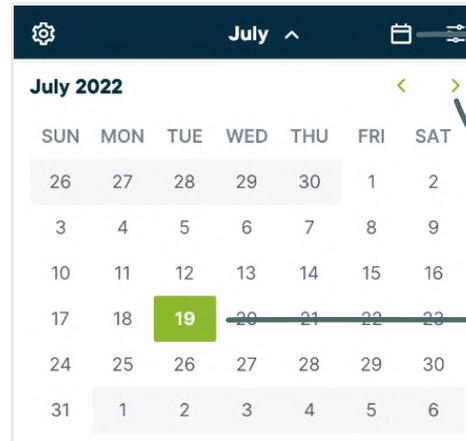Today's date is highlighted in green. Tap on a date to jump to that date.

Tap the **Schedule** tab from the menu to see what is on your calendar.

View your schedule

Tap the **Month** in the app heading to view another date.
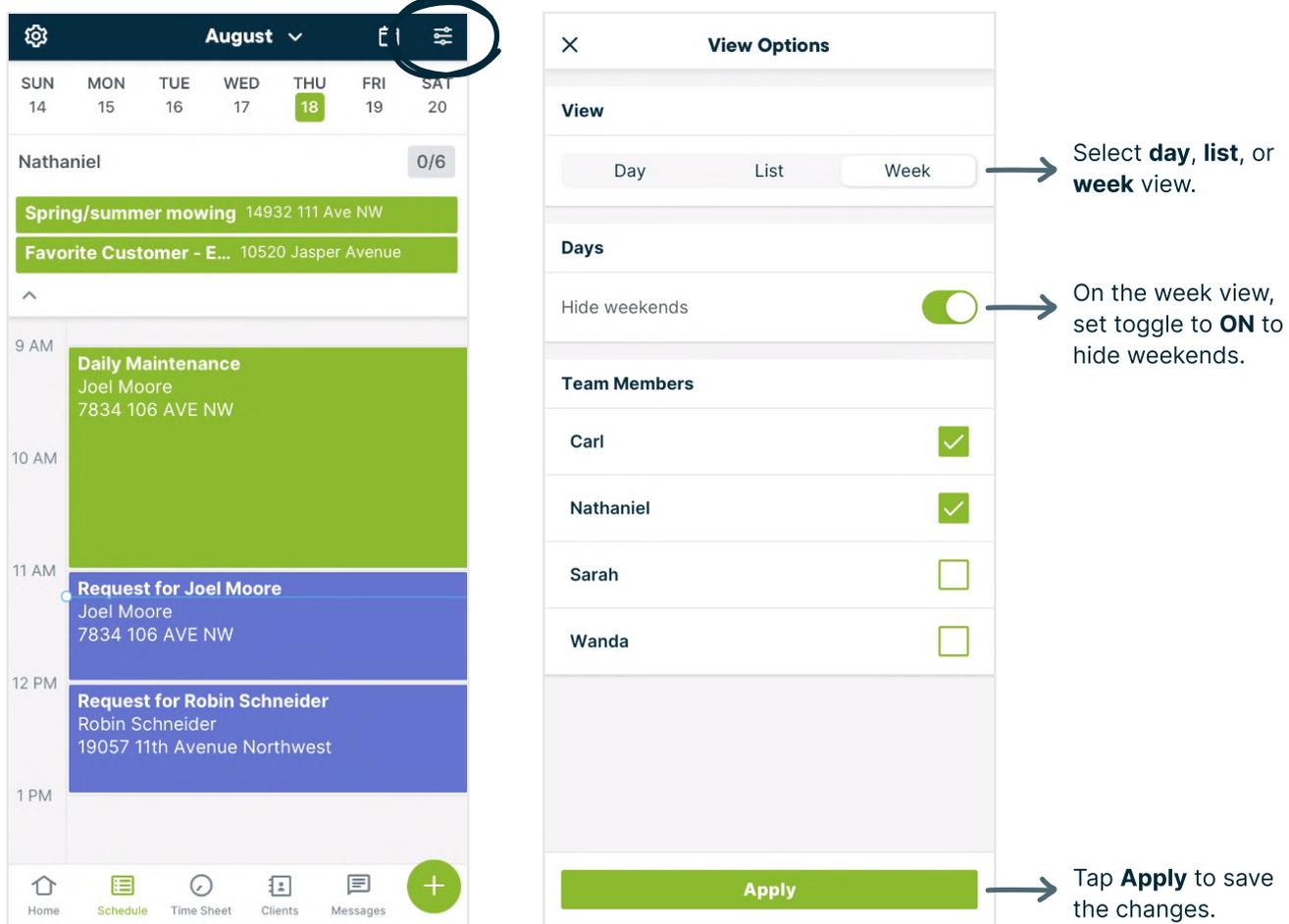
From here, tap on any date you'd like to view.

Tap the **Calendar icon** to jump back to the current day.

Tap these arrows to change the month.

Your selected date will be highlighted in green.

View your schedule

Tap the **View options icon** to change your view or select what information to show.

Select **day**, **list**, or **week** view.

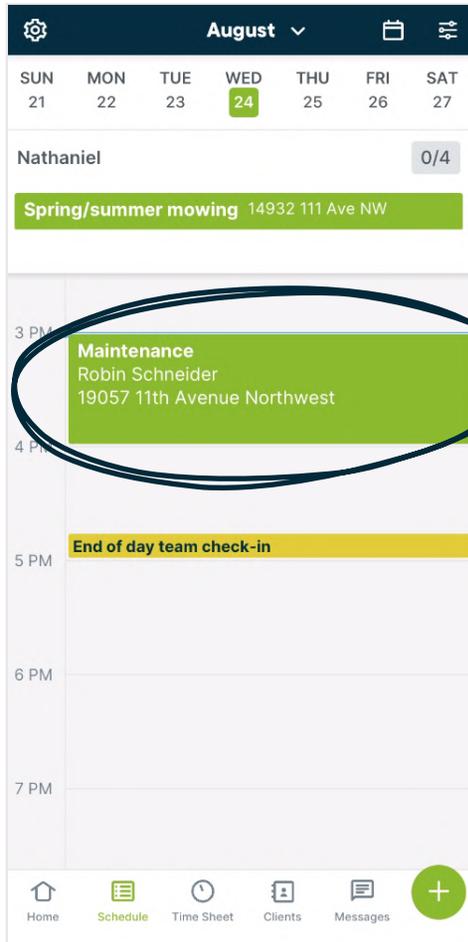On the week view, set toggle to **ON** to hide weekends.

Tap **Apply** to save the changes.
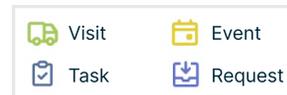
Get the Work Done

View client details

From any schedule view, tap a visit or assessment to see the appointment details.

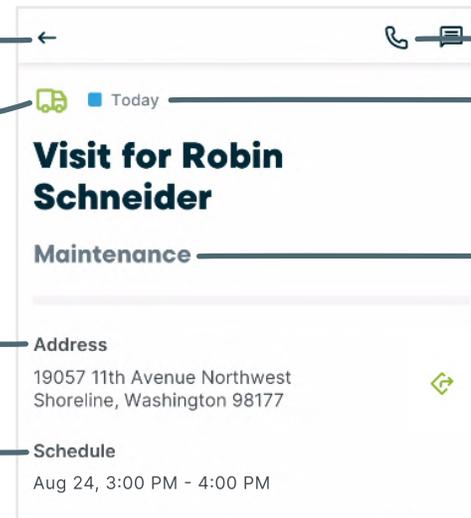Check out this **article** for more detailed information and instructions.

Tap to navigate back to schedule.

Icon indicates what type of schedule item this is.

🚛 Visit	📋 Event
☑ Task	📥 Request

Where you're going and where this visit takes place.
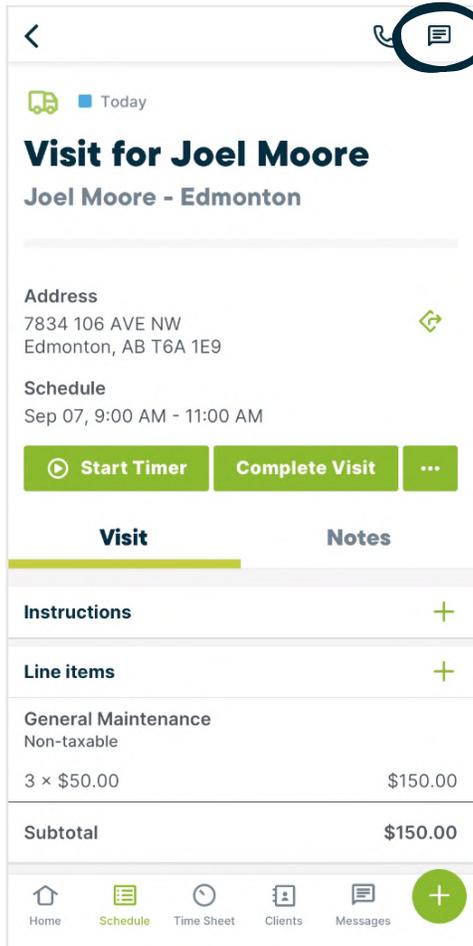
Schedule date and time.
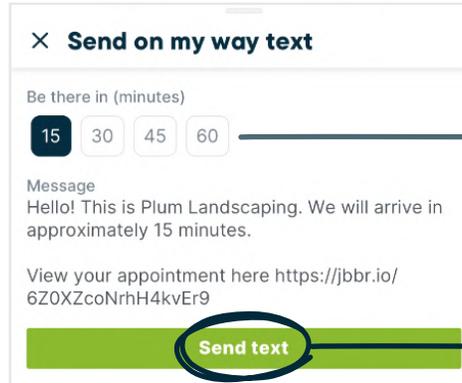
Tap to call this client.

Job status.

Job or visit status.

Send an "on my way" text

Tap to send an on my way text message.

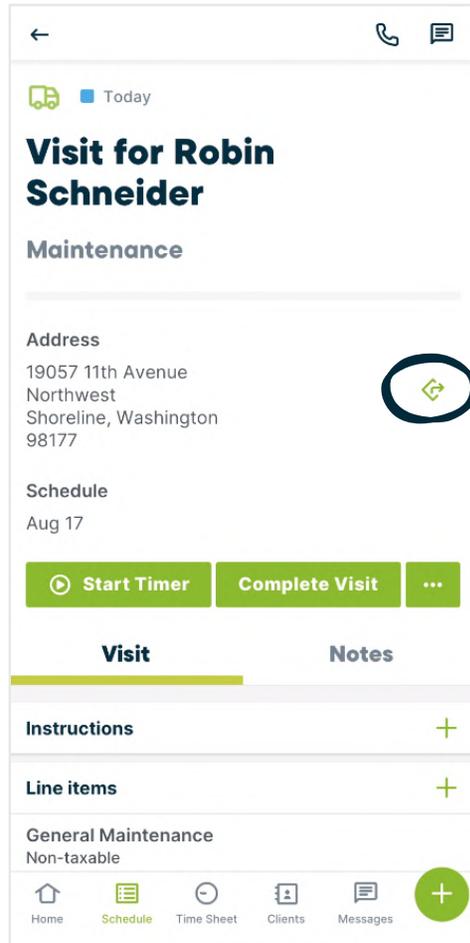*On select plans: Send a text message*

Tap the minutes.

Tap to send.

Once sent, the client will receive a message that looks similar to the example below:

Navigate to the property address

Tap to navigate to the address and open using the the map app of your choice.

Open in Apple Maps

Open in Google Maps

Open in Waze

Copy address

Start the visit timer

*As part of your work, you may need to start a visit timer to log your time on this job. Tap **Start Timer** to begin recording your time with the visit timer. If you already had a general timer running, starting the visit timer will pause the general timer and log your time on this visit instead.*

Tap to **start a visit timer**. This time will be visible from the **Time Sheet** tab.
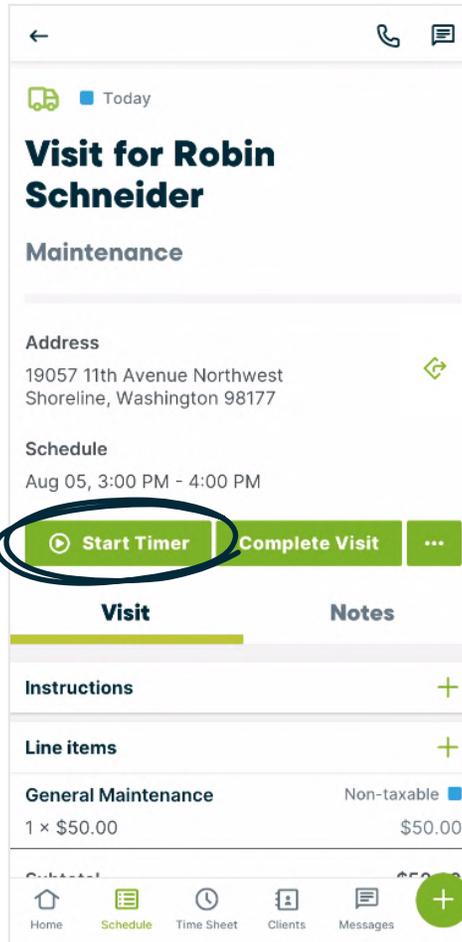
Add a note

*Check out this **article** for more detailed information and instructions.*

2 Tap to leave a note or upload attachments like photos.

1 Tap to view notes.

Enter your note here.

This section will expand to fit your note if you write more than one line.

Tap to attach images or files.

Images can be added from your device's camera roll or taken in the moment.

Make sure your device has given the Jobber App permission to access your photos.

Fill out job forms

There might be a job form on some visits, which is a checklist or form to be filled out while you're at the visit. Job forms can have different field types including text fields, dropdowns, and check boxes.

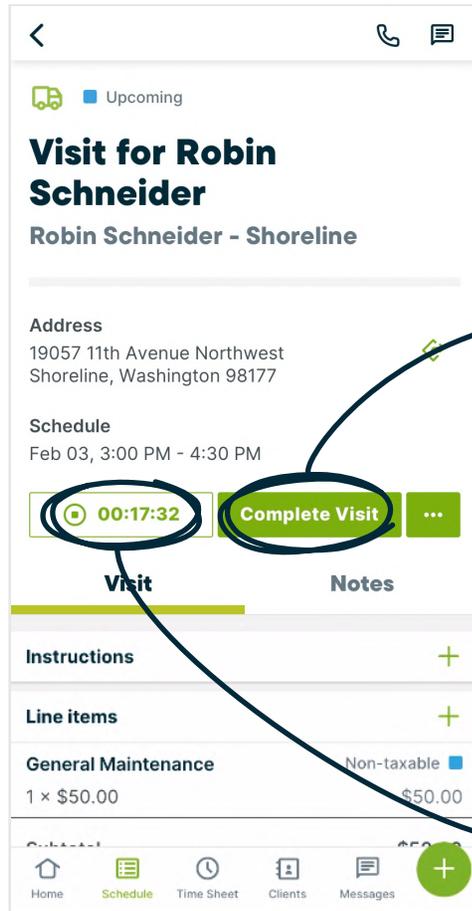*Check out this* **article** *for more detailed information and instructions.*

Tap to fill out this job form.

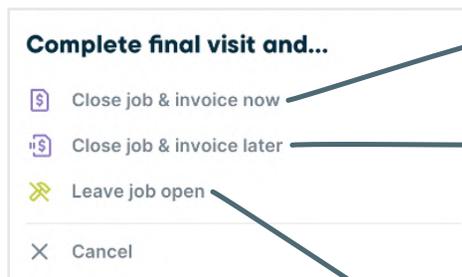Tap to save once you've entered all the information.

Tap to save and send an email copy to your client.

Complete the visit and stop the visit timer

Check out this [article](#) for more detailed information and instructions.

1 Tap to **complete the visit**.

Closes the job and creates a draft invoice based on this job.

Closes the job and leaves it in "requiring invoice" status.

If you aren't the one making the invoice, this is a good way to flag for the office that this job needs to be billed.

Job will remain open, but visit will be completed.

2 Tap to **stop the visit timer.**

Invoicing and Payments

Create and send an invoice

If your role also includes invoicing while out in the field, here is how to create an invoice and collect payment.

*Check out this **article** for more detailed information and instructions.*

Tap this to create an invoice for the job.

Tap to add additional line items.

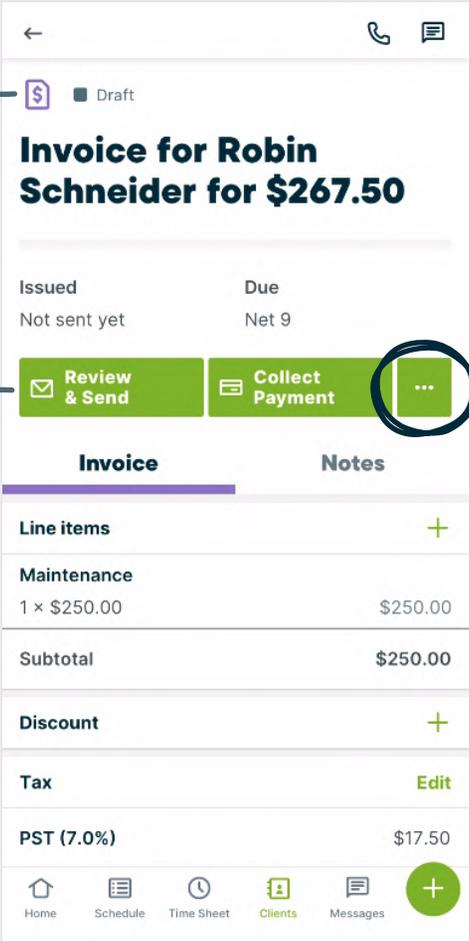Line items from the job will appear on the invoice.

Tap to edit line item.

Create and send an invoice

When the invoice is created, it will be in draft status.

Tap to send the invoice to the client by text or email.

Tap to open more actions.

Collect payment

*If the client is with you and they are ready to pay, select **Collect Payment** to record the payment details. If you have [Jobber Payments](#) turned on in your account and are accepting credit card payments, you do so through this option.*

Tap to collect payment.
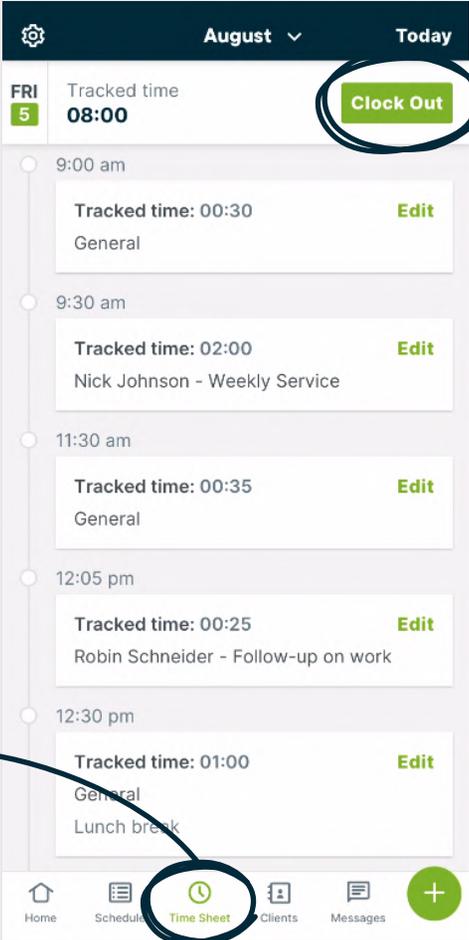
Tap to save.

Method of payment:

If you have Jobber Payments turned on, you can select **Credit Card** as a method and process the credit card payment through the app.

Otherwise, you can select **Cash**, **Check**, or **Other**.

End of Day

Clock out

Tap **Clock Out** to stop the general timer for the day and end any visit timers that might be running.

Go back to the **Time Sheet** tab when you are done for the day.

Checklist and Support

Now that you've read about the features that support your role working in the field, it's time to get comfortable using them. Use this checklist to familiarize yourself with the tools that will support your day-to-day.

☐ Clock into the general timer in the app to start your day.

☐ View your schedule in the app and tap on a visit. Familiarize yourself with where to start a job timer, leave a note, as well as where to view and fill out a job form.

☐ From the visit, locate where to send an on my way message.

If you invoice as part of your role:

☐ Generate an invoice from a job.

☐ Familizarize yourself with collecting payment and how to change the payment method and amount.

Need more help?

Check out the **Your Day-to-day in the Jobber App** article in our Jobber Help Center to get more detailed instructions and videos.

Book training

Want some 1:1 help to get up and running with Jobber? Our product coaches can work with you and your team to ensure everyone is comfortable using Jobber for their roles.

Start a chat with us or send us an email at support@getjobber.com and we can get you booked in for a training session.