



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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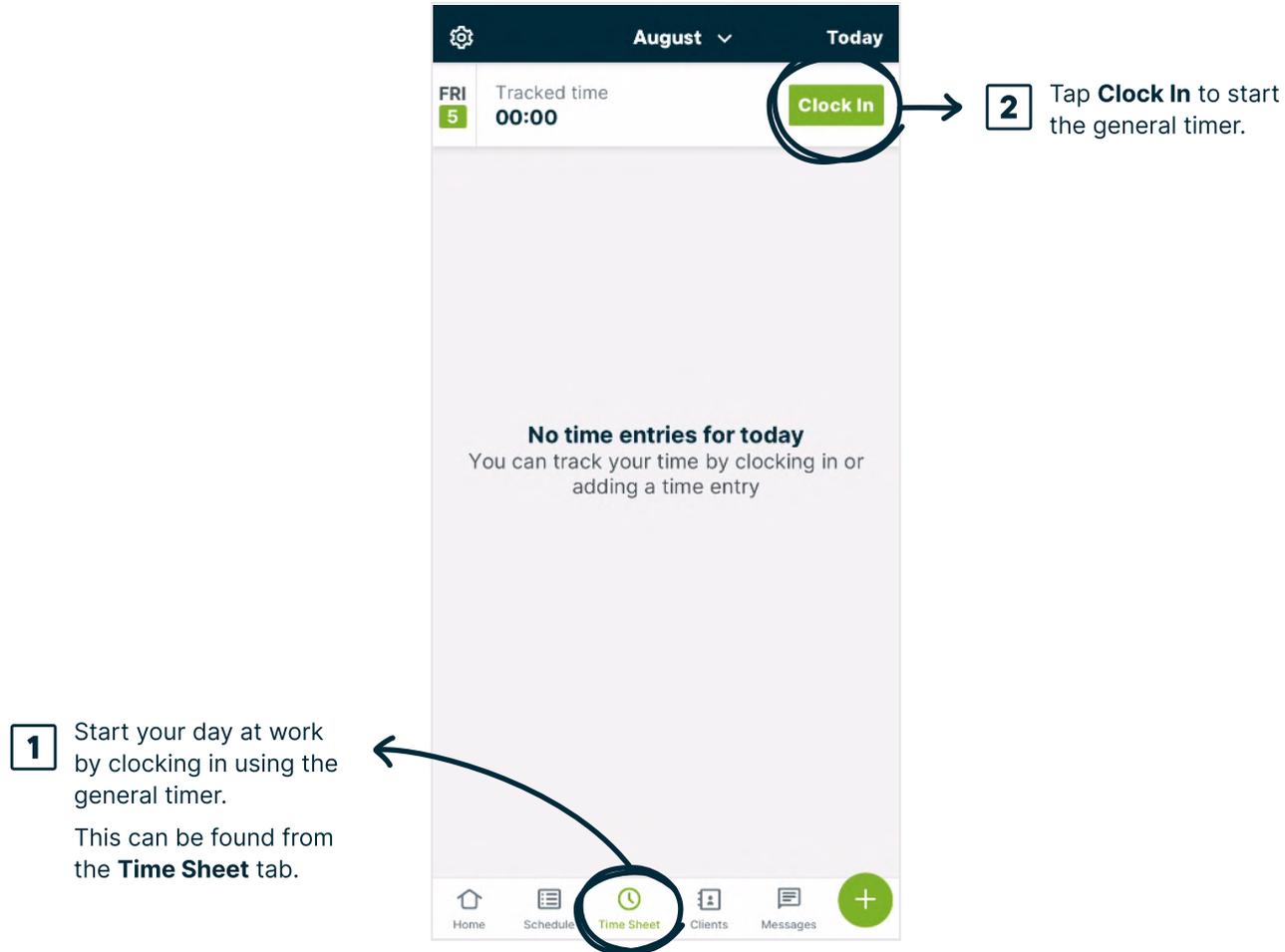
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See and Manage Your Schedule

Start your day by clocking in

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



Start your day by clocking in

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

The screenshot displays a mobile application interface for tracking time. At the top, it shows the date 'August' and 'Today'. Below this, the day 'FRI 5' is indicated, along with a 'Tracked time' of '08:00' and a 'Clock In' button. A vertical timeline on the left shows various times from 9:00 am to 12:30 pm. Each time point has a corresponding 'Tracked time' entry with a duration and a description. For example, at 9:00 am, the tracked time is 00:30 for 'General'. An 'Edit' button is circled in green on the first entry, with an arrow pointing to a detailed 'Edit time entry' dialog box. This dialog box contains fields for 'Start time' (9:00 AM), 'End time' (9:30 AM), 'Duration' (0 hr : 30 min), and a 'Note' field.

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

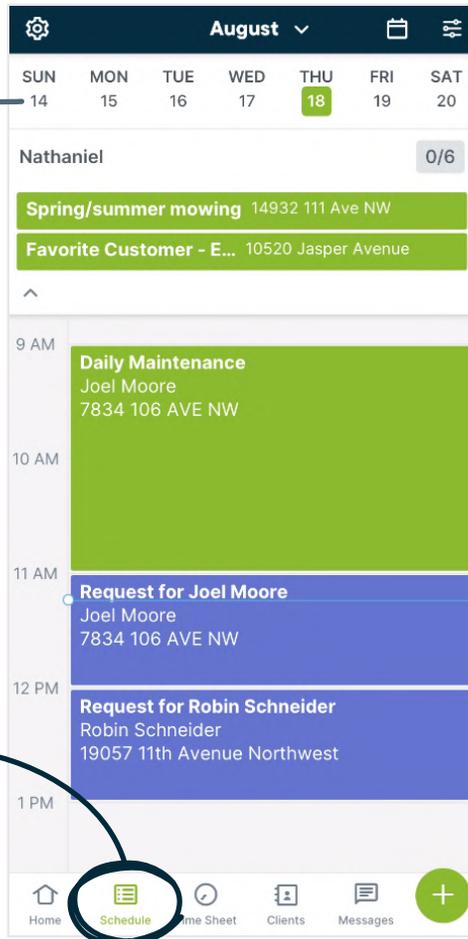
View your schedule

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.

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



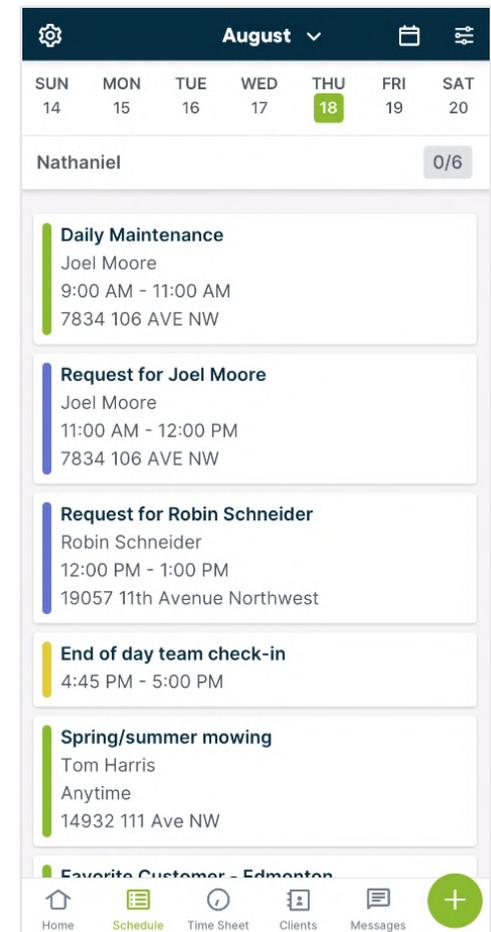
Week View

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



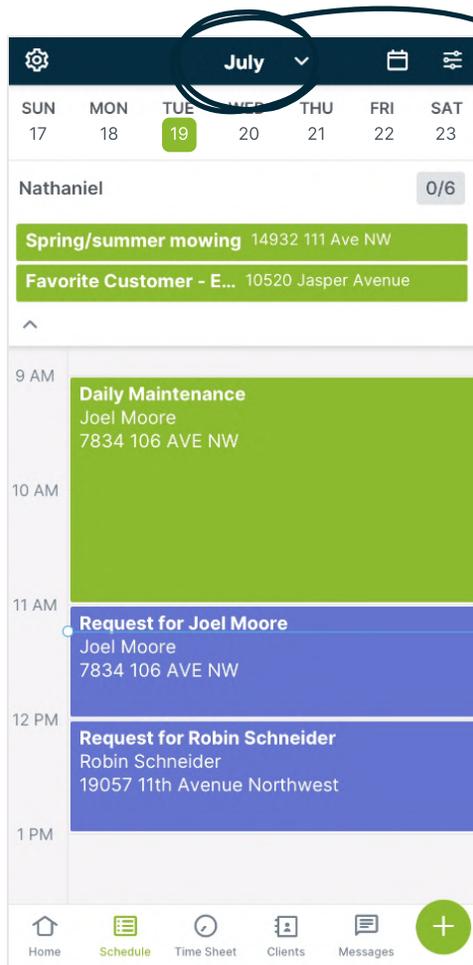
List View

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



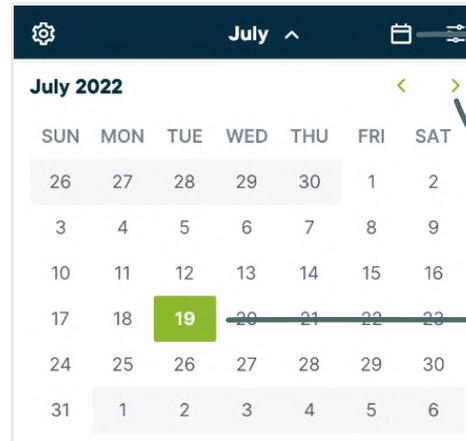
Tap the **Schedule** tab from the menu to see what is on your calendar.

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.



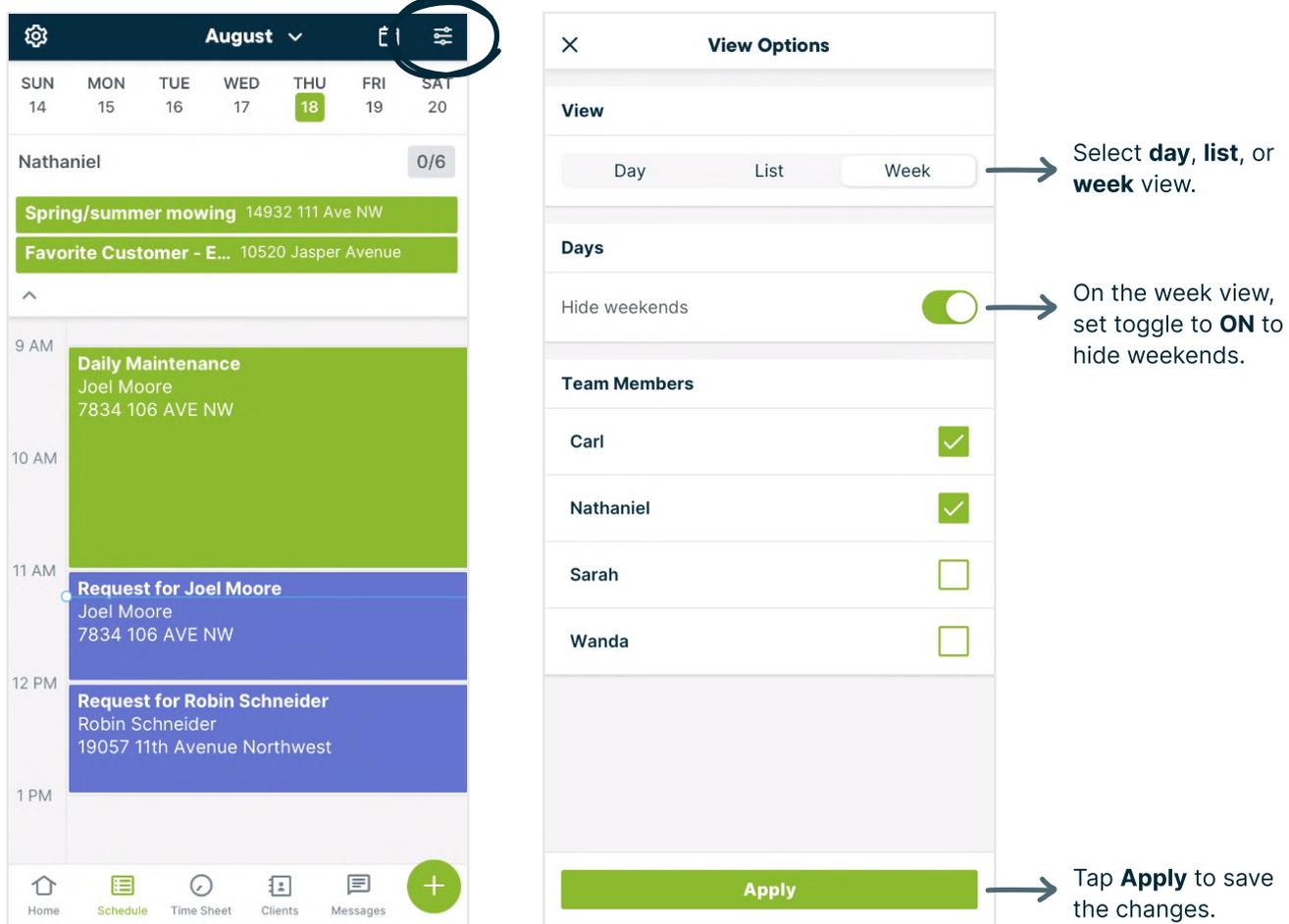
Tap the **Calendar icon** to jump back to the current day.

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.



The screenshot shows the Jobber mobile app interface. At the top, there's a calendar for August with the 18th selected. Below the calendar, there's a list of tasks for Nathaniel, including 'Spring/summer mowing' and 'Favorite Customer - E...'. The main part of the screen shows a schedule for the day of August 18th, with tasks like 'Daily Maintenance' and 'Request for Joel Moore' and 'Request for Robin Schneider'. At the bottom, there's a navigation bar with icons for Home, Schedule, Time Sheet, Clients, Messages, and a plus sign.

View Options

View

Day List Week

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

Days

Hide weekends

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

Team Members

Carl

Nathaniel

Sarah

Wanda

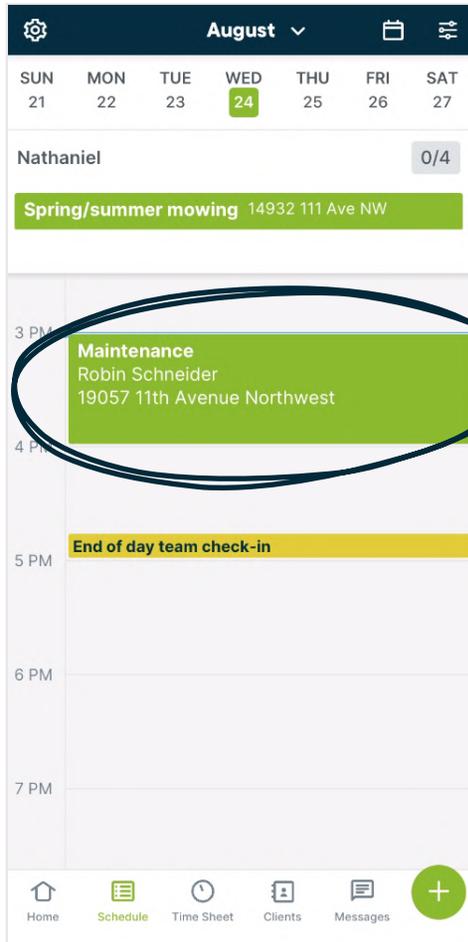
Tap **Apply** to save the changes.

Get the Work Done

View client details

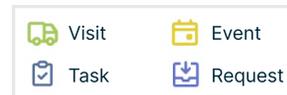
From any schedule view, tap a visit or assessment to see the appointment details.

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



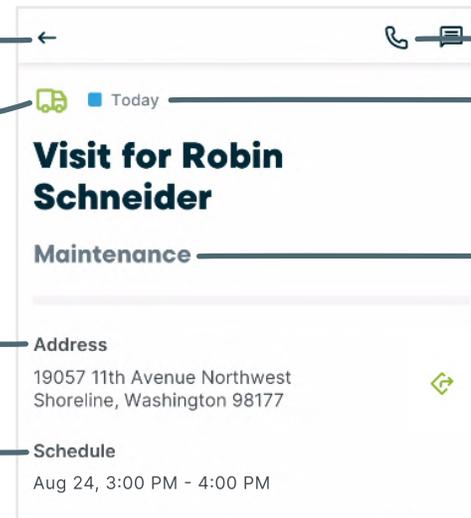
Tap to navigate back to schedule.

Icon indicates what type of schedule item this is.



Where you're going and where this visit takes place.

Schedule date and time.

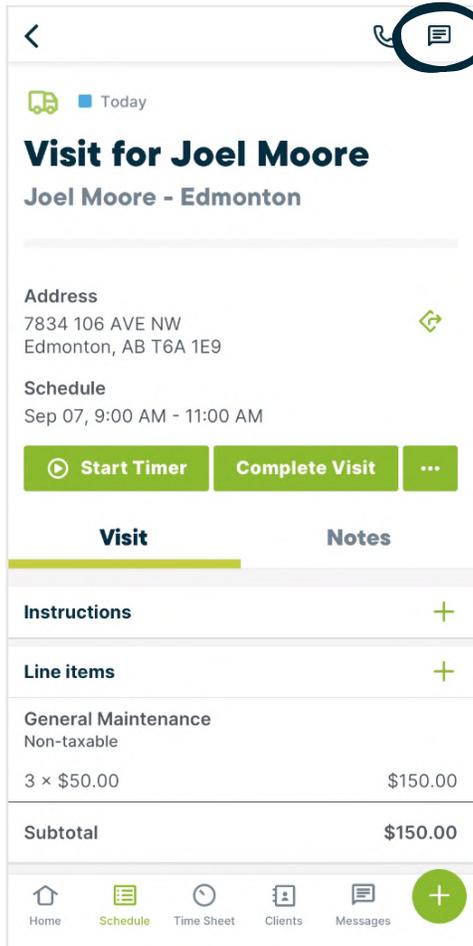


Tap to call this client.

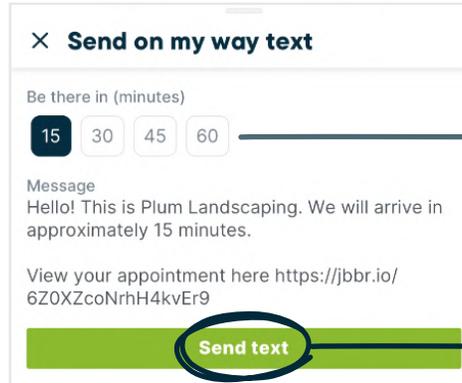
Job status.

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*



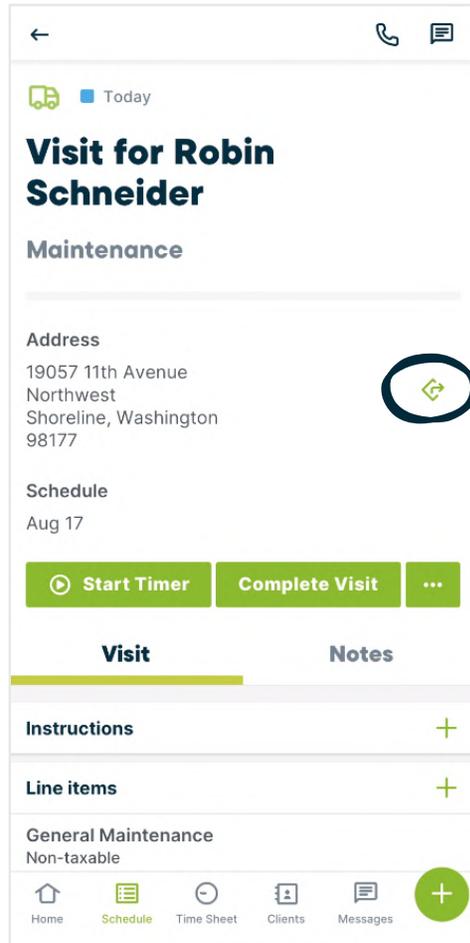
Tap the minutes.

Tap to send.

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



Navigate to the property address



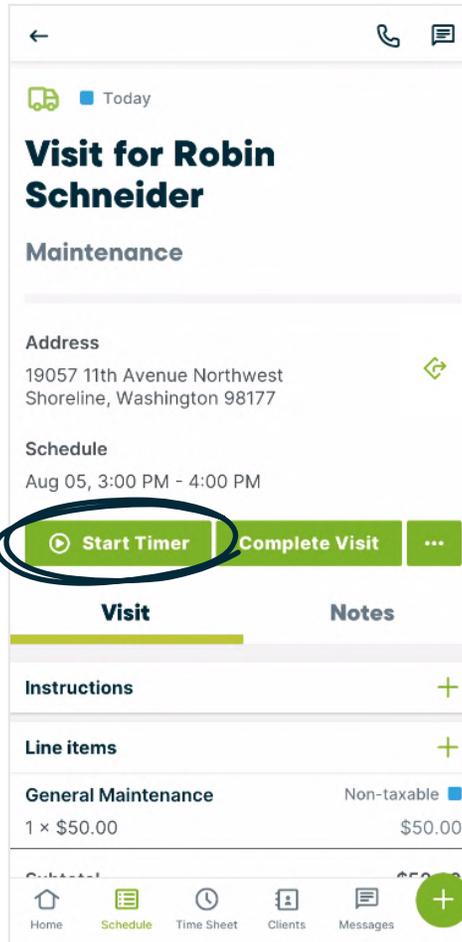
Tap to navigate to the address and open using the the map app of your choice.

- 📍 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.

1 Tap to view notes.

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

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.

The image shows two screenshots from a mobile application. The left screenshot displays a job summary page with sections for 'Instructions', 'Line items', 'General Maintenance' (1 x \$50.00, \$50.00), 'Subtotal' (\$50.00), 'Job forms' (Safety Checklist, Not filled), 'Schedule details' (Aug 05, 3:00 PM - 4:00 PM), and 'Assigned team' (Nathaniel). A green circle highlights a right-pointing arrow next to the 'Safety Checklist' entry. An arrow points from this circle to the right screenshot. The right screenshot shows the 'Safety Checklist' form with fields for 'Last updated' and 'Sent on' (both '-'). Under the 'On-site' section, there are four checklist items: 'Appropriate PPE is being worn' (checked), 'Identify any standing water or other hazards' (checked), 'Pickup any items that are in the way (pinecones, etc)' (unchecked), and 'Fuel equipment on level ground' (unchecked). At the bottom, there is a green 'Save' button and a three-dot menu button. Arrows point from these buttons to explanatory text on the right.

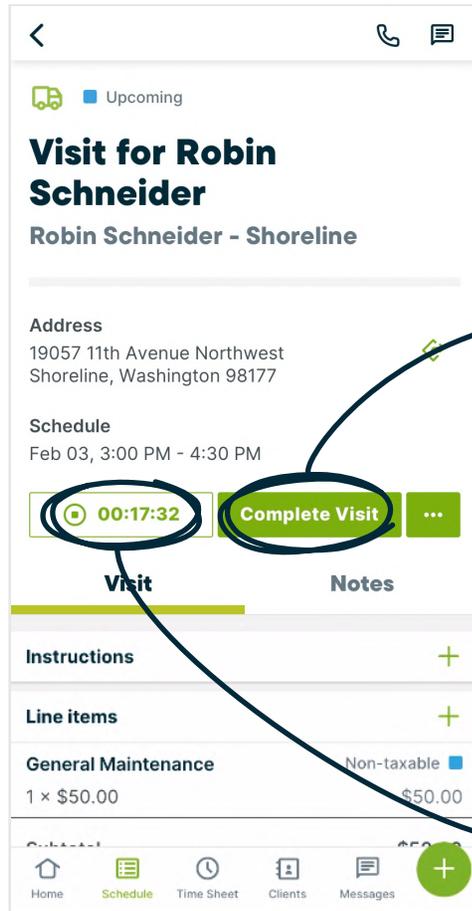
Tap to fill out this job form.

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

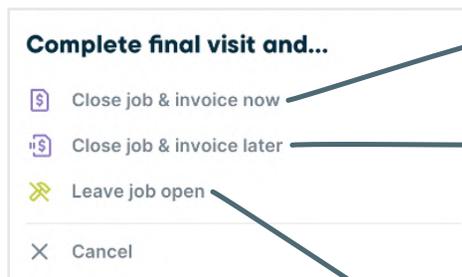
Tap to save and send an email copy to your client.

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.

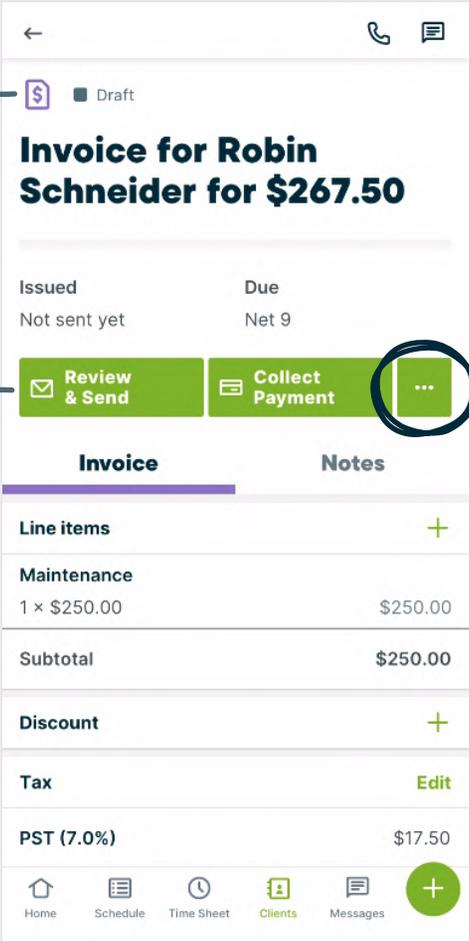
Invoice	Notes
Line items	+
Maintenance	
1 × \$250.00	\$250.00
Subtotal	\$250.00
Discount	+
Tax	Edit
PST (7.0%)	\$17.50

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.



The screenshot displays a mobile application interface for creating and managing invoices. At the top, a status bar shows a back arrow, a phone icon, and a message icon. Below this, a draft status is indicated by a dollar sign icon and the word 'Draft'. The main heading reads 'Invoice for Robin Schneider for \$267.50'. Below the heading, the 'Issued' status is 'Not sent yet' and the 'Due' date is 'Net 9'. Two primary action buttons are visible: 'Review & Send' (with an envelope icon) and 'Collect Payment' (with a credit card icon). A third button, represented by three dots, is circled in blue, and an arrow points to a dropdown menu containing two options: 'Collect signature' (with a pen icon) and 'Delete invoice' (with a trash icon). The invoice details are organized into sections: 'Line items' (with a plus icon), 'Discount' (with a plus icon), and 'Tax' (with an 'Edit' link). The 'Line items' section shows a single item: 'Maintenance' with a quantity of 1, a unit price of \$250.00, and a total of \$250.00. The 'Subtotal' is also \$250.00. The 'Tax' section shows 'PST (7.0%)' with a total of \$17.50. At the bottom, a navigation bar includes icons for Home, Schedule, Time Sheet, Clients, Messages, and a large green plus icon.

Invoice	Notes
Line items +	
Maintenance	
1 × \$250.00	\$250.00
Subtotal	\$250.00
Discount +	
Tax Edit	
PST (7.0%)	\$17.50

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.

← Draft

Invoice for Robin Schneider for \$267.50

Issued: Not sent yet | Due: Net 9

Review & Send | **Collect Payment**

Invoice | Notes

Line items	
Maintenance	
1 × \$250.00	\$250.00
Subtotal	\$250.00
Discount	
Tax	Edit
PST (7.0%)	\$17.50

Home | Schedule | Time Sheet | Clients | Messages | +

Tap to collect payment.

Cancel | **Collect Payment** | Save

Invoice balance: \$267.50

Cash

Aug 05, 2022

Amount: \$267.50

Details

Tap to save.

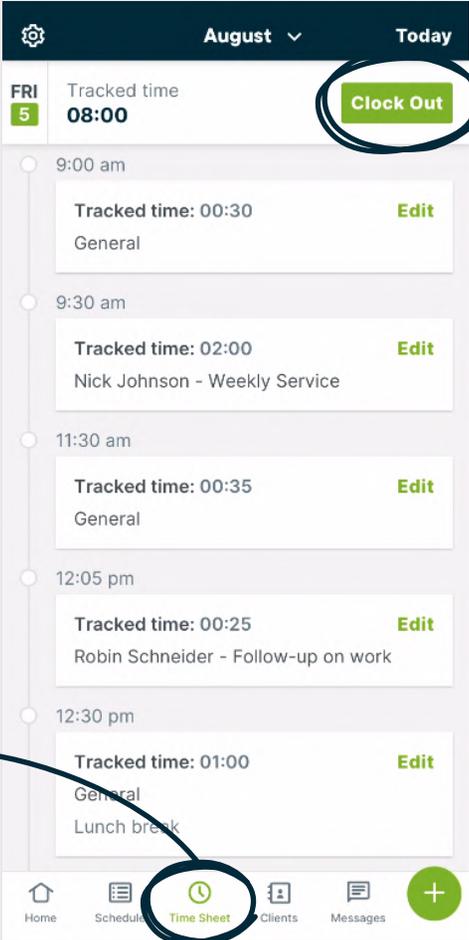
Method of payment:

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



The screenshot shows the 'Time Sheet' tab in the Jobber mobile app. At the top, there's a header with a gear icon, 'August', and 'Today'. Below that, it says 'FRI 5' and 'Tracked time 08:00'. A green 'Clock Out' button is circled in the top right corner. The main area displays a vertical timeline with several tracked time entries, each with an 'Edit' button. The entries are: 9:00 am (00:30 General), 9:30 am (02:00 Nick Johnson - Weekly Service), 11:30 am (00:35 General), 12:05 pm (00:25 Robin Schneider - Follow-up on work), and 12:30 pm (01:00 General Lunch break). At the bottom, there's a navigation bar with icons for Home, Schedule, Time Sheet (which is circled), Clients, Messages, and a plus sign.

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

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

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.
- Familiarize 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.