



Hi! Thanks for choosing JobsDun

This is an easy to follow step by step guide that will cover:

- Logging In
- Configuring the Settings
- Adding Staff
- Navigating the Calendar
- Booking Quotes & Jobs
- Moving Jobs
- Invoicing & Onsite Card Payments

This Guide takes about 20 minutes to complete, which means that in about 21 minutes you will realise you are on a winner.

PC or iPad? The screens on both devices are almost identical. In this guide we are using the PC version, but will include iPad notes where the process differs.

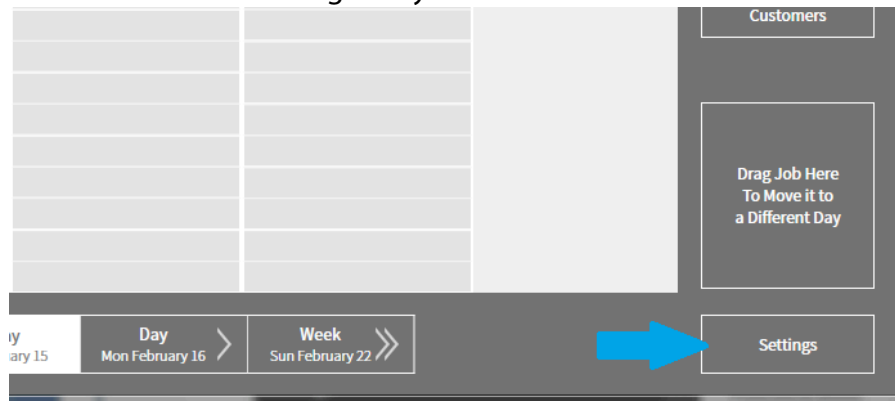
JobsDun is an app. That means it's stored on your device. When you are using it, it connects to the internet, where your data is stored, always backed up and made available to be shared around your co-workers. Any change you make on one device is automatically updated in real time to the others. And if you loose your device, all your data will be safe.

To continue with this document you should have the following.

1. A valid free trial account or paid account
2. JobsDun installed on your computer or iPad.

Settings Screen

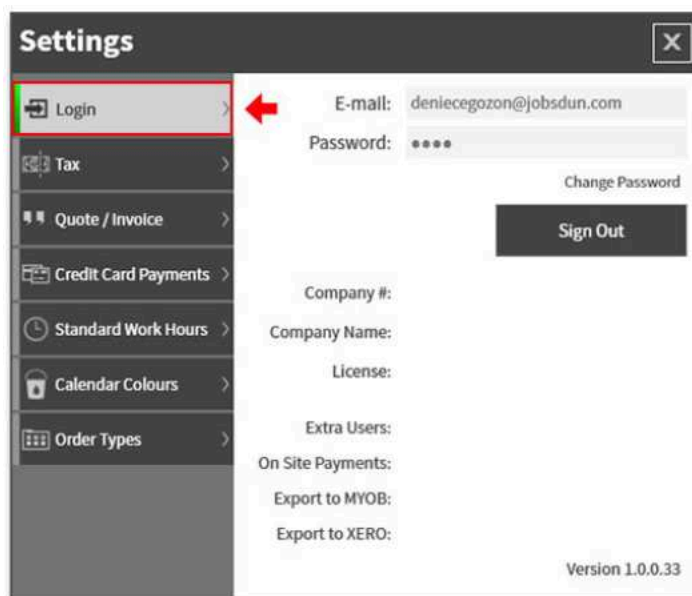
It's quick and easy to set your system up from the settings screen. Which will appear automatically the first time you log in. If not click the Settings button located at the bottom right of your screen.



Logging In

An email with your username and password should have been sent to you.

Note that any changes you make to the settings will be SAVED when you press the X button at the top right.



Login Screen

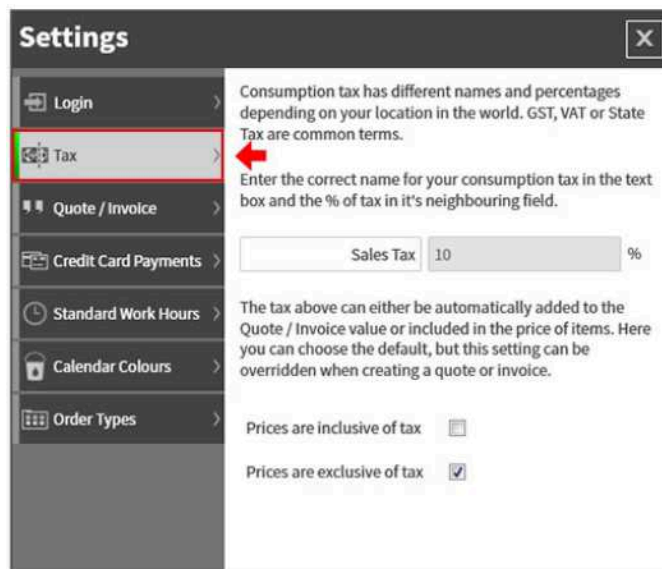
Presented by default upon opening JobsDun

1. Enter your email and password in the top of the page
2. Press the Sign In button.

Tax

This tab controls any sales tax and how it's applied to prices on quotes and invoices.

1. Click the Tax tab.



The screenshot shows the 'Settings' window with the 'Tax' tab selected. The sidebar on the left lists various settings: Login, Tax, Quote / Invoice, Credit Card Payments, Standard Work Hours, Calendar Colours, and Order Types. The 'Tax' tab is highlighted with a red box and a red arrow points to it. The main content area for the 'Tax' tab contains the following text: 'Consumption tax has different names and percentages depending on your location in the world. GST, VAT or State Tax are common terms.' Below this is a text input field with a red arrow pointing to it, containing the text 'Enter the correct name for your consumption tax in the text box and the % of tax in it's neighbouring field.' To the right of the text input field is a 'Sales Tax' field with the value '10' and a '%' symbol. Below this is a paragraph: 'The tax above can either be automatically added to the Quote / Invoice value or included in the price of items. Here you can choose the default, but this setting can be overridden when creating a quote or invoice.' At the bottom, there are two radio buttons: 'Prices are inclusive of tax' (unchecked) and 'Prices are exclusive of tax' (checked).

Tax Screen

Click the second button from the sidebar.

3. In many cases your tax type will be entered for you based on the country you have signed up in. In Australia this will be GST at a rate of 10%.
4. Select if the sell prices you enter into JobsDun are inclusive or exclusive of sales tax. In most cases prices will exclusive of tax.

Quote / Invoice

On this screen you can set the email address that you would like your invoices and quotes to come from. If you are happy with the email address that is in there (the email you signed up with) you can leave it. If you want to change either of them then modify them as required.

Settings

- Login
- Tax
- Quote / Invoice**
- Credit Card Payments
- Standard Work Hours
- Calendar Colours
- Order Types

Three Quote/Invoice Layouts are available to choose. You can upload an image of your header and make adjustments to produce your desired layout.

If you require more than one template layout you can request for a custom invoice to be created for you by e-mailing us at: custominvoice@jobsdun.com

The system can email quotes and invoices for you. Enter the e-mail address you want to appear as the 'FROM' address on those e-mails.

Quote E-mail:

Invoice E-mail:

Next Invoice Prefix: Number:

Default Terms:

Open the Quote & Invoice Builder

Invoice (prefix)

If you want to add a prefix to your invoice numbers such as "JD", then when you generate an invoice in JobsDun the invoice number will be "JD00215"

Next Invoice (number)

You can adjust this number at any time, the number shown here is the last invoice generated in the system. The next invoice will be that number + 1. Please modify if required.

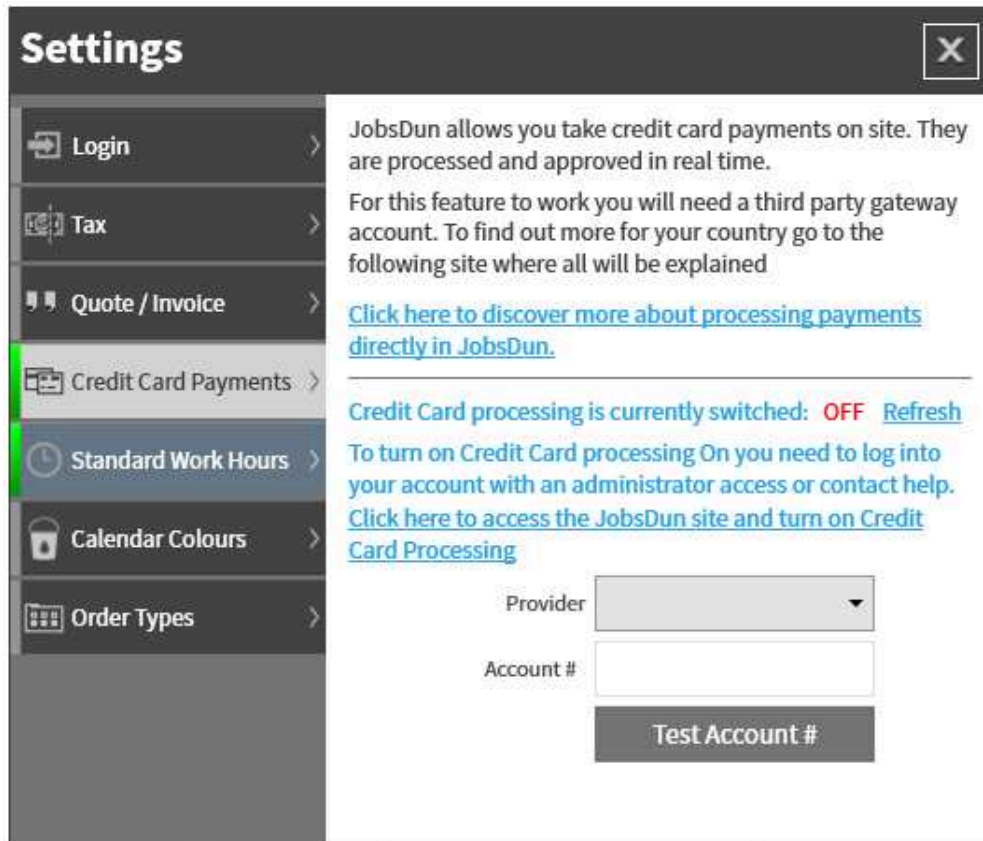
Note: If you will be exporting invoices to MYOB, MYOB can only handle 8 character invoice numbers. Invoice numbers longer than 8 digits will not work in MYOB.

Default Terms: this is the default terms that will appear on each invoice.

Quote and invoice Builder allows you to customise the look and feel of your PDF quotes and invoices that will send out from JobsDun. You can even add your own letterhead. This is optional.

Credit Card Payment

This is one of our most popular features. JobsDun let's you accept major credit cards on site. Saving you time, money, reduces paperwork and get's you paid.



The screenshot shows the 'Settings' window with a sidebar on the left containing the following menu items: Login, Tax, Quote / Invoice, Credit Card Payments (highlighted with a green bar), Standard Work Hours, Calendar Colours, and Order Types. The main content area for 'Credit Card Payments' contains the following text: 'JobsDun allows you take credit card payments on site. They are processed and approved in real time. For this feature to work you will need a third party gateway account. To find out more for your country go to the following site where all will be explained'. Below this is a link: '[Click here to discover more about processing payments directly in JobsDun.](#)'. A status line reads: 'Credit Card processing is currently switched: OFF Refresh'. Below this is another link: '[To turn on Credit Card processing On you need to log into your account with an administrator access or contact help. Click here to access the JobsDun site and turn on Credit Card Processing](#)'. At the bottom, there are three input fields: 'Provider' (a dropdown menu), 'Account #' (a text box), and 'Test Account #' (a text box).

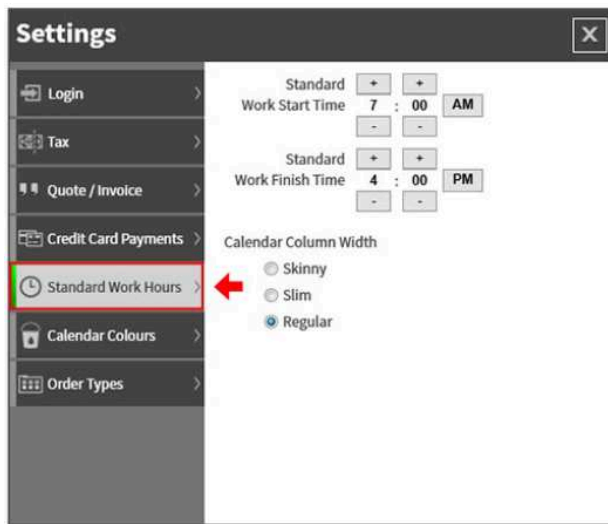
To get on site credit card processing working you need to open an account with one of our credit card merchant partners, [Eway](#) or a [STRIPE](#). These companies collect the money and pay it into your bank account automatically.

Stripe accounts can be setup in minutes. Eway take a little longer.

To see a detailed guide about turning this feature on and integrating direct payment into your JobsDun account [click here](#).

Standard Work Hours

Just set the time you normally start work finish work. Having this set in the system just makes faster to fill in some forms.



Standard Work Hours Button

Located on the fifth tab of the sidebar.

The Calendar Column width controls how wide columns appear in the calendar, therefore effecting how many team members are visible on the screen at one time.

Note: iPad does not have the ability to change the width of calendar columns.

Skinny shows 11 tradies on a standard lap top screen

Slim shows 8 tradies on a standard lap top screen

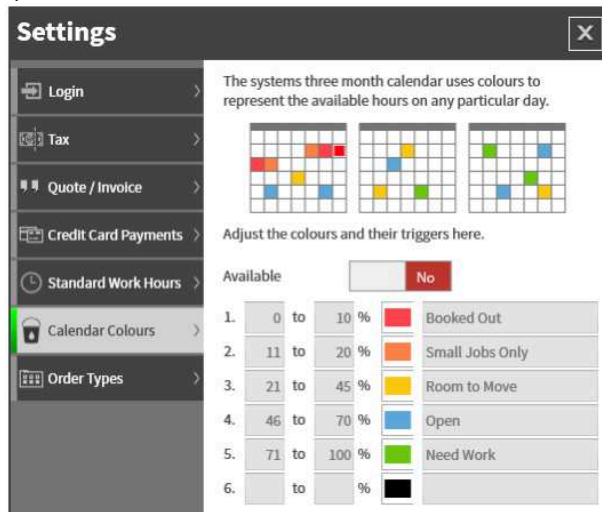
Regular shows 6 tradies on a standard lap top screen

the screen below is set to SKINNY.



Calendar Colours

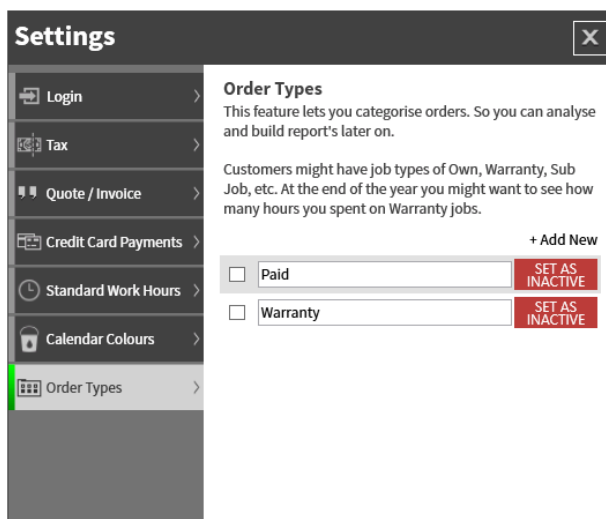
This feature uses colour's to show the how busy each day is. It can be used to indicate where you can place job's without needing to analyse each day. When setting up your system it is best left until you start to get more data into the system.



Order Types

These can also usually be left untouched. By default your system will have two order types, being; PAID and WARRANTY.

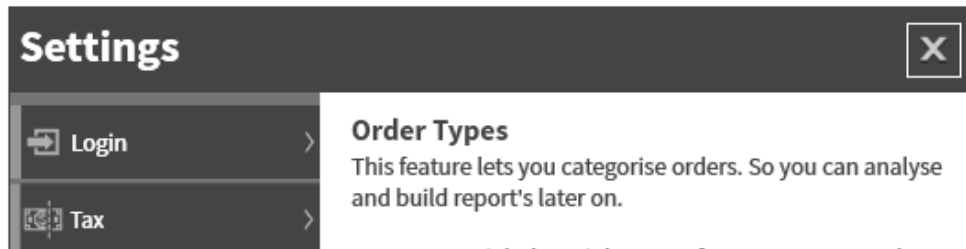
If you want you can add more. Their purpose is to let you categorise job's so that you can report on them later. For example, JobsDun could show you the % of hours spent in a month on PAID and WARRANTY work.



Well DUN.


Settings are DUN

Click the X at the top and your data will SAVE.



Navigating the Calendar

1. The day the calendar is currently displaying is shown in the orange box at the top left of screen.



Sat, 14 Feb	Brett	john	jezza
7 AM			
8 AM			
9 AM			

2. Clicking on the orange date displays three month calendar. If you click on a day you will JUMP to that date. Try it out.

Sat, 14 Feb	February 2015	March 2015	April 2015	hen	harry	Leave	Not Available
7 AM	Mo Tu We Th Fr Sa Su	Mo Tu We Th Fr Sa Su	Mo Tu We Th Fr Sa Su			Add Job/Quote	
8 AM	2 3 4 5 6 7 8	2 3 4 5 6 7 8	1 2 3 4 5			Calendar	
9 AM	9 10 11 12 13 14 15	9 10 11 12 13 14 15	6 7 8 9 10 11 12			Quotes	
10 AM	16 17 18 19 20 21 22	16 17 18 19 20 21 22	13 14 15 16 17 18 19			Jobs	
11 AM	23 24 25 26 27 28	23 24 25 26 27 28 29	20 21 22 23 24 25 26			Invoicing	
12 PM		30 31	27 28 29 30			Receive Money	
1 PM						Accounts Export	
2 PM						Reports	
3 PM						Tradies / Staff	
						Customers	

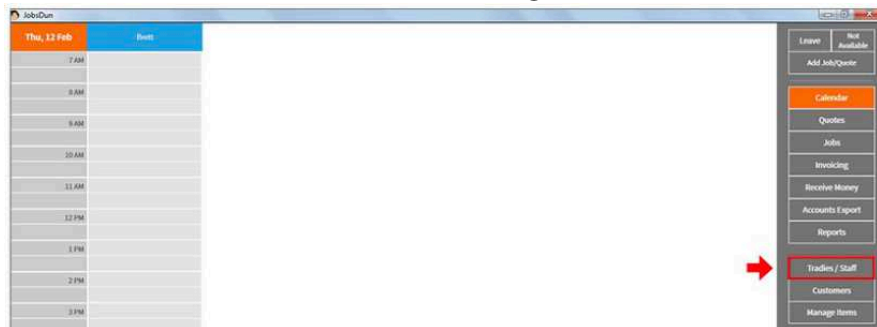
3. Most of the time you will want to move forward or backward one day or one week at a time. To do this use the navigation buttons at the bottom of the calendar.

Clicking the centre button will always return you to TODAY.

Week	Day	Today	Day	Week
Sat February 07	Fri February 13	Sat February 14	Sun February 15	Sat February 21

Adding Staff

1. Click the Tradies / Staff button on the right side



2. Click the + button located at the top of the tradie Overview Screen.



3. Enter the staff members First and last name. The nick name will auto fill with their first name. The nick named will be used in the calendar.

If the staff member will be logging into the system they will need an email as their username and a password.

A screenshot of the staff member form. The form has a left sidebar with 'General Info' and 'Permissions' sections. The main area contains several input fields: 'First name', 'Last name', 'Nickname' (with a note 'Will appear in the calendar'), 'E-mail', and 'Password'. A red box highlights the 'E-mail' and 'Password' fields. A blue box highlights the 'E-mail' field with a note: 'This will be the log in details for this user. Not Required if they don't need access.' At the bottom, there is a 'Status' dropdown menu set to 'Active' and 'Back' and 'Save' buttons.

4. Press SAVE
5. Press the + sign in the header to keep adding staff.

Adding a Job / Quote

Each job card stores the following

- Client Information
- Invoice address
- Site Address
- Job Notes
- Quote
- Invoice
- Attachments like images, pdf, word and excel.

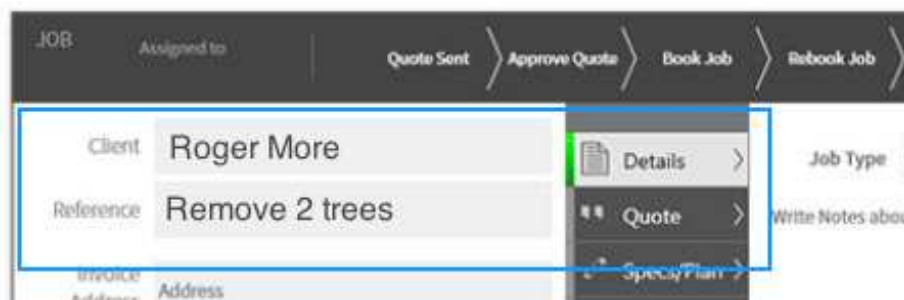


Lets pretend we get a call to remove two trees from Roger's house, and we need to do an on site quote.

1. Click the ADD Job/Quote button at the top right of screen.

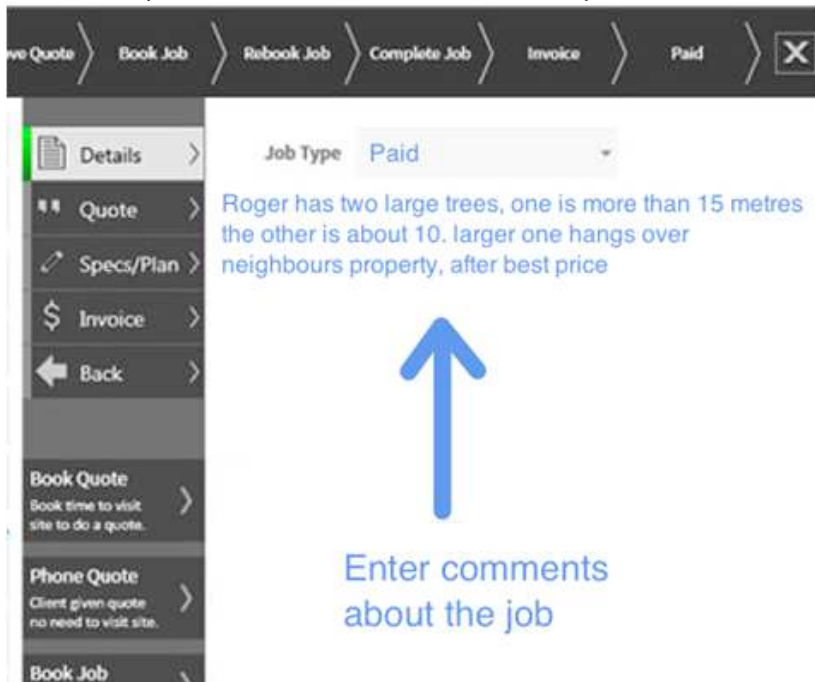


2. The Job Screen will appear. Now, enter the client name at the top. This is always the person or company you will send the invoice to. Once entered the system will remember them. You can change these details later if you need.



3. Enter a reference, usually a description of the job or a reference number.
4. When entering an address, (ipad only)JobsDun will try and look up a match on the internet, if it finds a match select it and the suburb state and post code will fill in automatically.

5. Enter any relevant information about the job in the comments box.

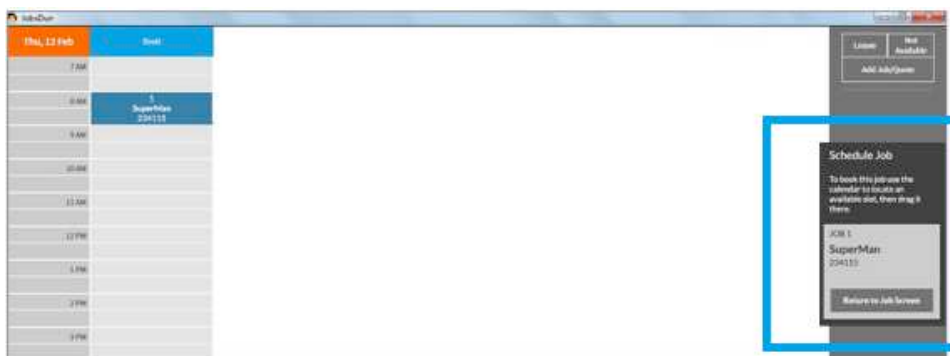


BOOKING A SITE QUOTE, QUOTING AND EMAILING THE QUOTE TO THE CLIENT

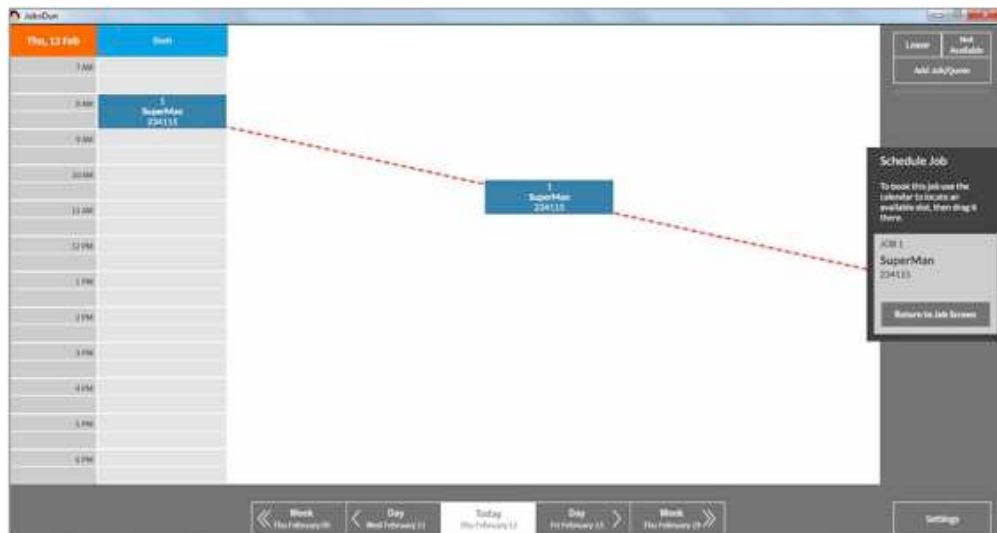
Please note the three actions available in the Centre panel;

- A. Book Quote – Let's you book a time to attend site and quote.
- B. Phone Quote – Store's the quote in the quote list so that it can be searched on later, but it will not appear in the calendar.
- C. Book Job – Let's you book the job in the calendar immediately.

Click the BOOK QUOTE button. You will be taken to the calendar and the job will instantly jump to the right boarder, ready to be placed on the calendar.



- Find an available day/time in the calendar using either the navigation buttons at the bottom of the screen, or by using the three month calendar. Remember, the three month calendar can be found by clicking on the orange button at the top left (the one with the date on it).
- When you find a time to book the quote, drag it from the right boarder to the time slot.

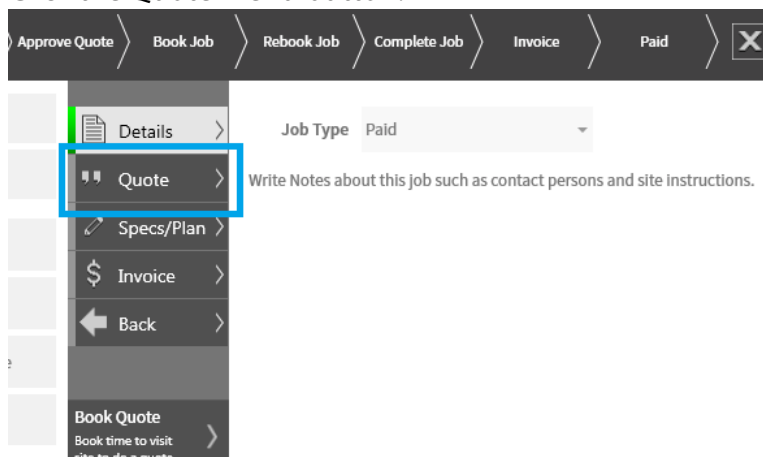


- The Quote is now booked.

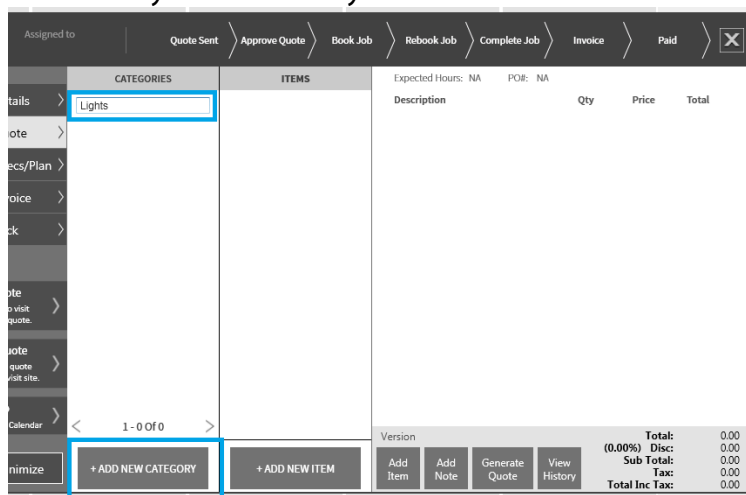
Building a Quote

You can either build a quote using the quote builder and, or manually type them. The quote builder is a price list of the products or services you provide.

1. Click on the job you just put on the calendar, this will open the job screen.
2. Click the Quote menu button.

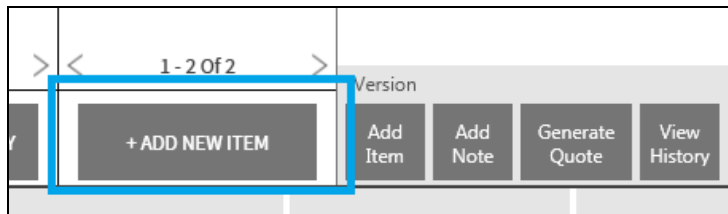


3. Two columns will appear, Categories and Items. Click the ADD NEW CATEGORY button and, as an example, enter Lights as a new Category followed by the ENTER key to save it.

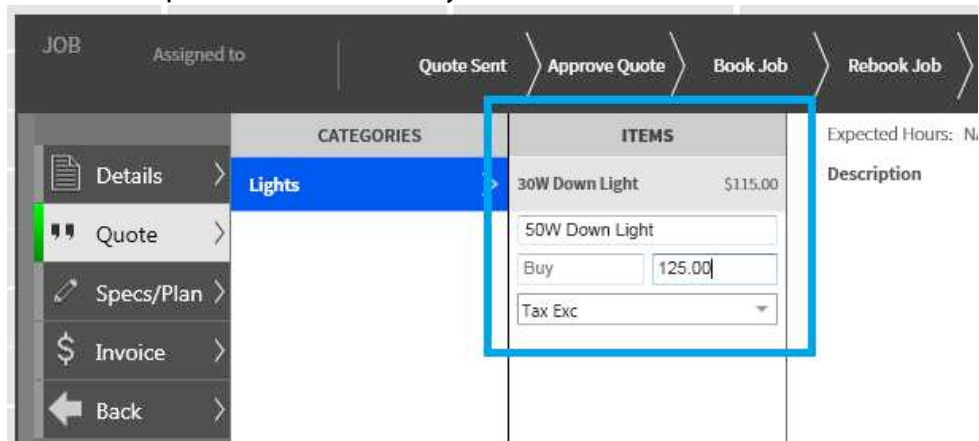


Note: to delete or edit a category, right click it. If you are on an iPad then press on the category for 3 seconds

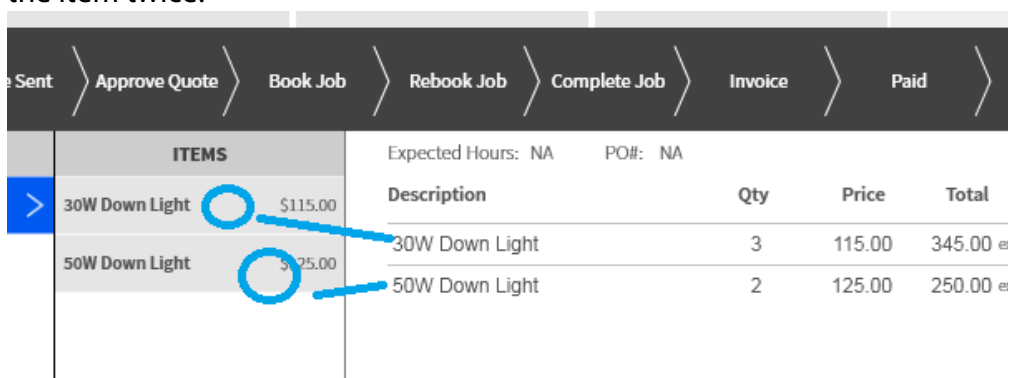
4. To add items to your new category, click the ADD NEW ITEM button located at the bottom of the items column.



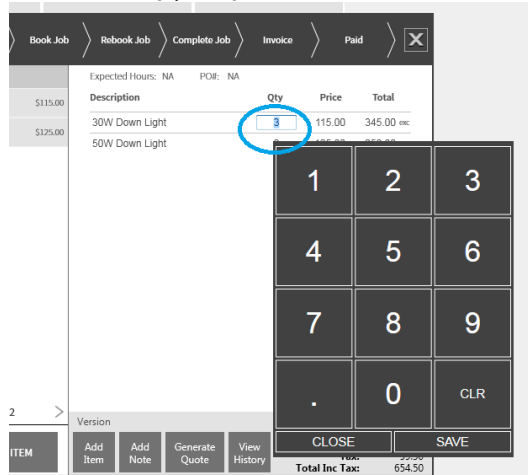
5. Fill in the description and Sell price. Press the Enter key to save the item or on the iPad press Done on the keyboard.



6. To add items from the item list to the quote, click on the items and they will automatically appear on the quote. To add two of the same item, click the item twice.



7. You can adjust the Qty or the price of the item on the quote by clicking on either the qty or price of that item.



Expected Hours: NA PO#: NA

Description	Qty	Price	Total
30W Down Light	3	115.00	345.00 exc
50W Down Light			

1 2 3
4 5 6
7 8 9
. 0 CLR

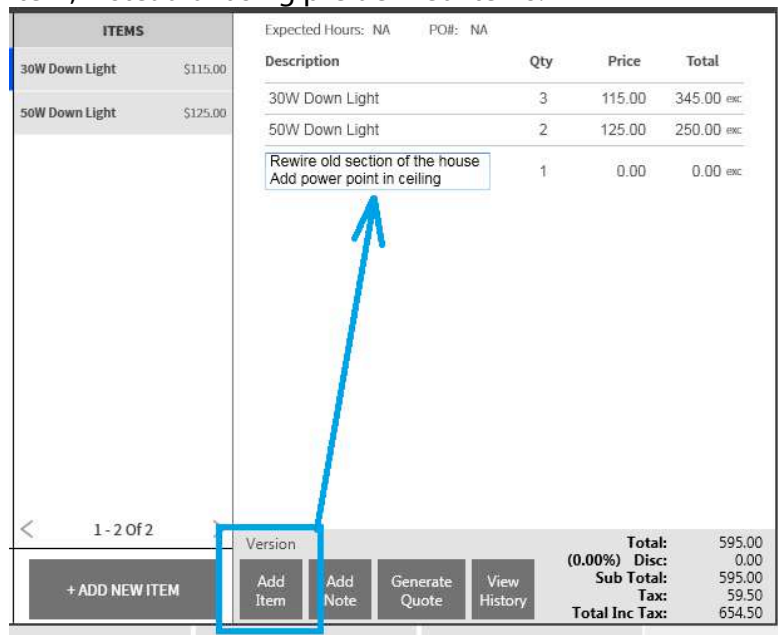
Version

ITEM Add Item Add Note Generate Quote View History

CLOSE SAVE

Total Inc Tax: 654.50

8. You can add items manually, without the need of the quote builder. Do this by clicking the ADD ITEM button. This allows you to simply type in the item, instead of using pre defined items.



Expected Hours: NA PO#: NA

Description	Qty	Price	Total
30W Down Light	3	115.00	345.00 exc
50W Down Light	2	125.00	250.00 exc
Rewire old section of the house	1	0.00	0.00 exc
Add power point in ceiling			

1 - 2 Of 2

Version

+ ADD NEW ITEM Add Item Add Note Generate Quote View History

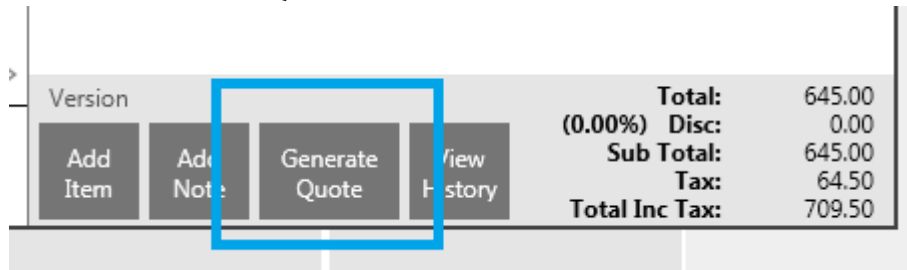
Total: 595.00
(0.00%) Disc: 0.00
Sub Total: 595.00
Tax: 59.50
Total Inc Tax: 654.50

9. You can add a note in the same way, notes will appear at the bottom left of the quote.

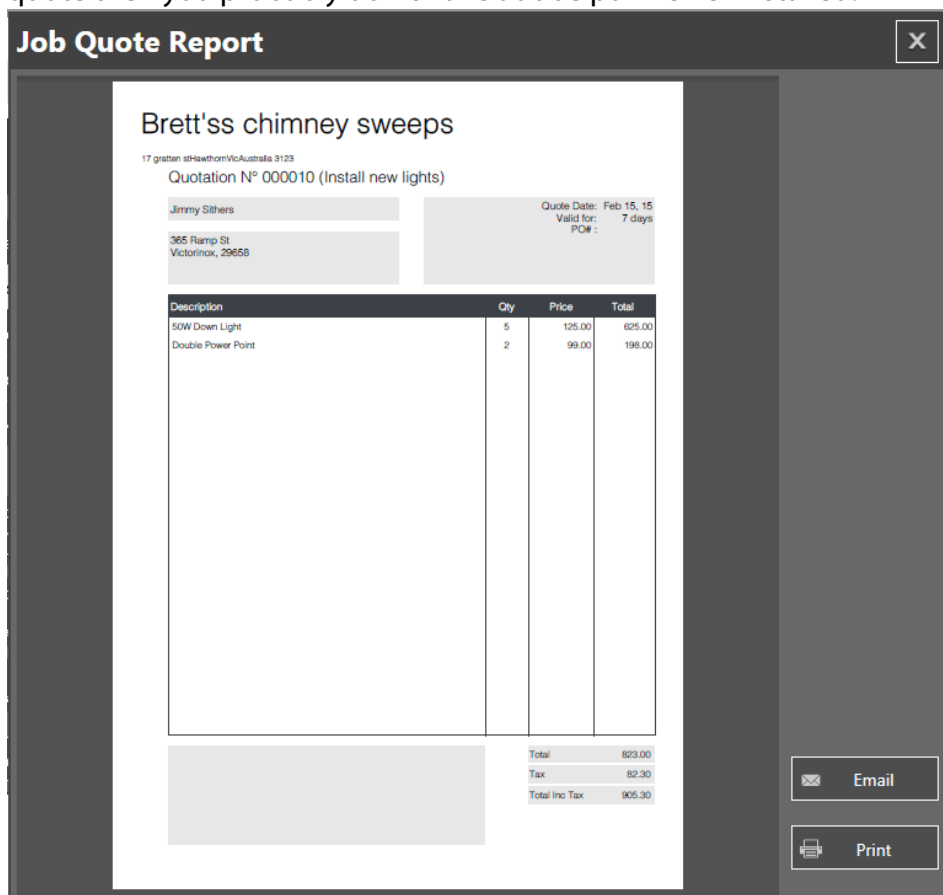
Well done, you now have a quote. Let's email it to the customer while we are on site. Simply click the Generate Quote button

Sending the Quote

1. Press the Generate Quote button



2. A PDF of the quote is generated and viewable in the main window. If you can't see the quote then you probably don't have adobe pdf viewer installed.



- To email the quote directly to the customer press the Email button. The email screen is designed to look like a standard email, most of the text has been written for you. This default text comes from the Setting's screen.

E-mail Quote Report [X]

➡ To: jim@sithers.com,

Bcc: Include any e-mail addresses that should be sent a copy of this e-mail separated by comma

Subject: Quote from Bills Plumbing ←

Hello Jimmy Sithers,

Thank you for the opportunity to quote on your job.

Please find attached to this email the quotation for Job Number 10 with PO Number .

If you would like to proceed with this quotation or if you have any more questions
Then please contact us.

We look forward to working with you.

Kind Regards,
Bills Plumbing

[Send]

- You can fill in the To: field, edit the Subject line or any of the text. If you would like to receive a copy of the email then insert your email address in the BCC field.
- You can also Print the Quote, it will be sent directly to your default printer.
- When the quote has been either emailed or printed the system will mark the job as Quote Sent and record the date.

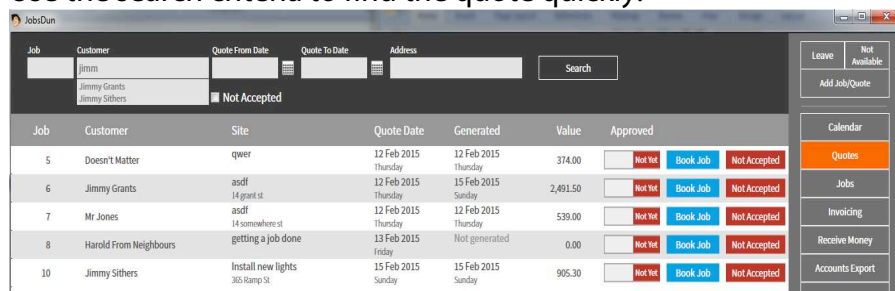
JOB 10	Assigned to	Quote Sent 15 Feb 15	Approve Quote	Book Job	Rebook Job	Complete Job	Invoice	Paid
Details	CATEGORIES	ITEMS	Expected Hours: NA PO#: NA					
Quote	Power		Description	Qty	Price	Tc		
	Lights		50W Down Light	5	125.00	625		
			Double Power Point	2	99.00	198		

Accepting the Quote

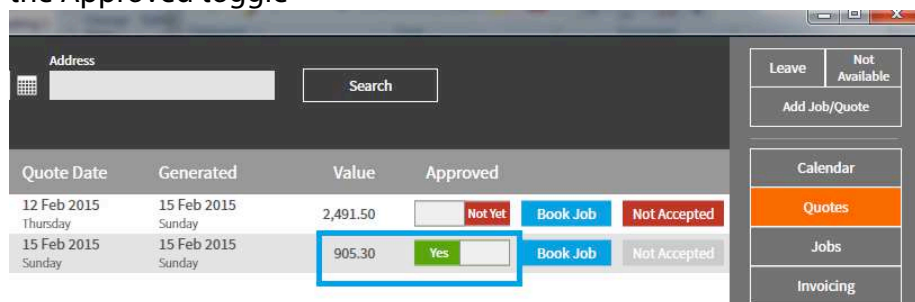
1. If a customer calls or emails to accept a quote then click on the menu item named Quotes. You will see a list of all quotes that have not been accepted.



2. Use the search criteria to find the quote quickly.

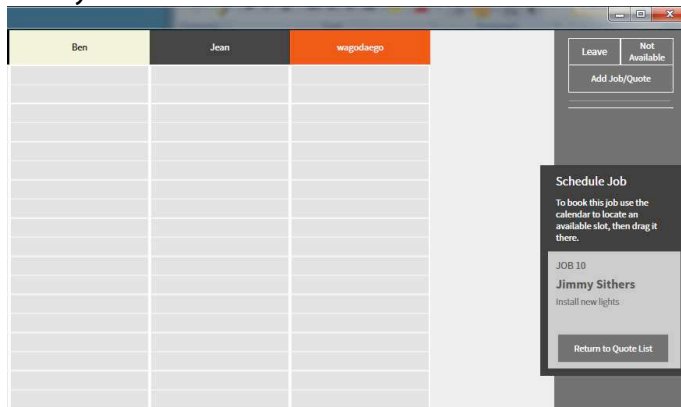


3. If the customer wants to accept the quote but cant schedule it yet, then just click on the Approved toggle



4. If they want to accept and book the job then click the blue BOOK JOB button. If the job has not been approved you will be prompted to confirm the booking. You will be taken to the calendar and the job will be waiting for you on the right side of screen.

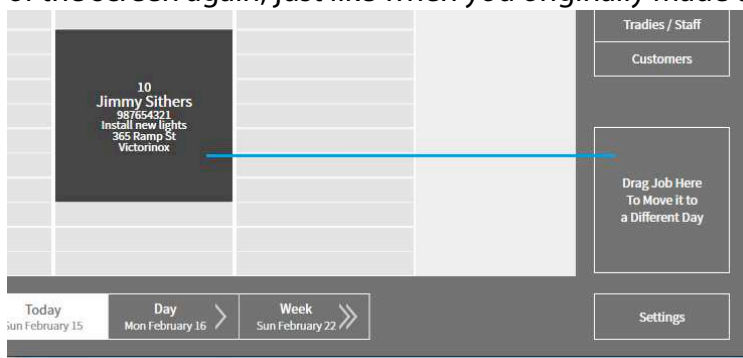
1. From here drag it to the person you want to assign the job to at the time you would like to book it.



2. To adjust the amount of time the job consumes in the calendar, you can drag it out by click and holding down on the top or bottom of the job. On the iPad, press the job down for a second and you will see the job jump a bit. It will then have an up and down drag arrow on the job.



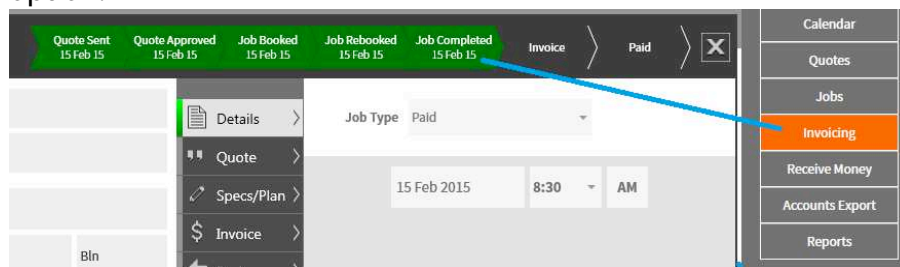
3. If you need to move a job to a different day then drag the job to the box in the picture below. It will place the job on the right hand side of the screen again, just like when you originally made the booking.



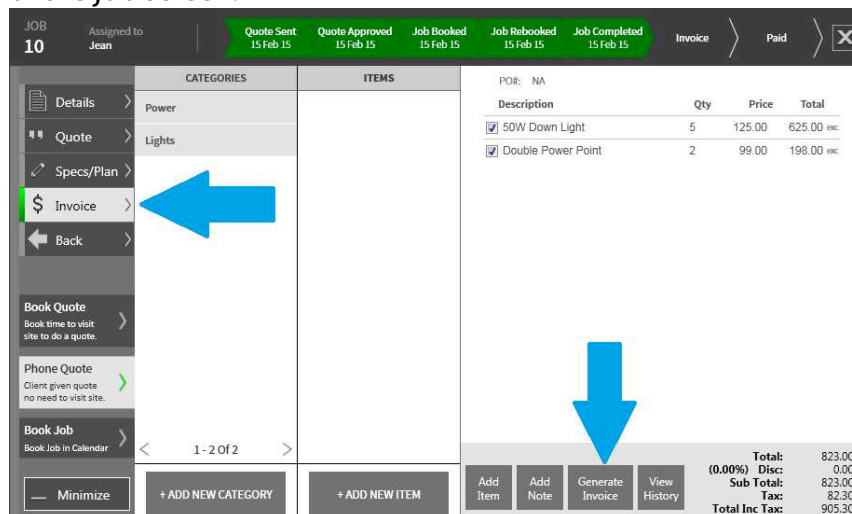
Invoice and Payment.

Jobs can only be viewed in the invoicing menu when the job has been marked as completed.

To Change a job status to completed, click "Complete Job" on the status bar at the top of the job screen. If you make a mistake you can right click the item and select "Clear". On iPad click and hold on the status to be given the "Clear" option.



1. Open the job you are going to invoice, select the invoice tab at the centre of the job screen.



Note: You can make adjustments and add extra items to the invoice if required.

Note: Every invoice item has a check box next to it. Only items where the check box is marked will be included on the invoice.

2. Click the Generate invoice button, like the quote screen you can print or email the invoice directly from here.

Job Invoice Report

Brett'ss chimney sweeps

17 garten street/10/Australia 3123
Invoice 0000004

Jimmy Silvers
365 Ramp St
Victorinox, 29658

Invoice Date: Feb 15, 15
Valid for: 7 days

Description	Qty	Price	Total
Double Power Point	2	99.00	198.00
50W Down Light	5	125.00	625.00

Total: 823.00
Tax: 82.30
Total Inc Tax: 905.30

Void Invoice
\$ Card Payment
Email
Print

3. If you press the Card Payment button, the invoice amount will be loaded onto the credit card screen and you can accept card payment directly.

Card Type

VISA MasterCard American Express

Name On Card

Card Number

Expiry Month Year
01-January 2014

CVN

905.30 Pay Now Cancel

\$ Card Payment

Note: You must have this feature turned on in your account for this to work. For more information on that, [click here](#).

WELL DONE,

You now know about 75% of the system.

If you have any further questions, please check out our help page, you can chat with us from our home page from 9am until 5pm Australian EST, or you can send us an email at help@jobsdun.com.

Thanks again for choosing JobsDun.

Kind Regards,
JD