JobDock

User guide

Field service software for small trade businesses: jobs, dispatch, estimates and invoices, on your own website.

- Where to start and how to set up
- The daily routine: dispatch board, My day, invoicing
- Every screen, setting and report explained
- Lite and Pro, the phone app and the public demo

Version 0.1.1 · For owners, office managers and technicians

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JobDock is field service software for small trade businesses: HVAC, plumbing, electrical, appliance repair, pest control and other home services. It keeps the schedule, the customer's history and the money in one place, on your own WordPress website, with no monthly fee per technician.

01 Why JobDock

Most small shops run on a whiteboard, a paper calendar, text messages and a spreadsheet. JobDock puts the same work in one place without changing how you work.

Problem in the shop	What JobDock does
Jobs fall through the cracks between the phone call and the visit	Every job either has a visit booked or shows under **To schedule** on the dashboard and the dispatch board until it does.
Nobody knows where the techs are	Technicians tap **On my way**, **Arrived** and **Finish** on their phone; the board shows it as it happens.
Work done is never written down	Finishing a visit asks what was done, the hours, and books the next visit in the same step.
Invoices go out late, or not at all	Parts and labor go on the job as you work. A finished job is invoiced in two clicks, with sales tax on the taxable lines.
Big jobs are lost on a single price	Estimates offer good, better and best options. The customer picks one and approves it from their phone.
Tune-ups depend on someone remembering	Maintenance agreements create their own visit jobs on time, every season.
Software priced per technician, data on someone else's cloud	One price per company, everything on your own website, and every list can be exported at any time.

02 Getting started

Install the plugin once, open the app at **yoursite.com/app/**, and follow the checklist on the dashboard.

What you need

- A WordPress website (6.4 or later) on PHP 8.1 or later. Ordinary shared hosting such as Hostinger works; nothing else needs installing.
- HTTPS on the site (free SSL from your host). It protects customer data and is needed to install the phone app.
- A browser on a computer, tablet or phone.

Which zip to install

Every version of JobDock comes as two zips. Both install the same way and use the same data, so you can move from one to the other at any time.

Zip	What it is
`jobdock-lite-<version>.zip`	**Lite, free.** Customers, service sites, equipment, jobs, visits, the dispatch board, the calendar, tasks, photos and files, the morning email and the core reports, for up to 2 users. The paid screens are shown as previews with sample data, and a licence key unlocks them without reinstalling.
`jobdock-full-<version>.zip`	**Full.** Every feature, nothing to unlock.

Install

1. In WordPress, go to Plugins → Add New → Upload Plugin, choose the zip and click Install Now, then Activate.
2. Open **yoursite.com/app/**. The WordPress administrator signs in and is the Owner. Staff who sign in go straight to the full-screen app and never see the WordPress admin area.
3. If `/app/` shows "page not found", go to WordPress → Settings → Permalinks and click Save once.
4. Before you enter any gate codes or your EIN, ask your web person to add this line to `wp-config.php` with a random string of at least 32 characters. Never change it afterwards, or those values cannot be read back:

```
define( 'JD_ENCRYPTION_KEY', 'your-long-random-string' );
```

Upgrading or moving from Lite to Full. Upload the new zip the same way. WordPress says the plugin is already installed: click **Replace current with uploaded**. Your data is not touched.

What is already loaded. A new install has HVAC job types (AC repair, tune-ups, installs and more, each with a color and a usual length), a sample HVAC price book and the US federal holidays for this

year and next. If you also do plumbing, electrical, appliance repair or pest control, load that trade's pack under Settings → Lists. Change the sample prices to your own before you invoice anyone.

First-day checklist. The dashboard shows these steps and ticks each one off:

1. Fill in the company name, phone, address and license number under Settings → Company. They print on estimates, invoices and reports.
2. Keep the job types you do, and add your own.
3. Put your prices in the price book (paid editions).
4. Add your technicians under Settings → Users so you can dispatch to them.
5. Add or import your customers.
6. Book your first job.
7. Make sure the site uses HTTPS.
8. Set up the scheduler so the morning email arrives on time (Settings → Emails).

Try it with sample data first. On an empty install, the dashboard offers **Load sample data**. It creates a sample Austin, Texas company with customers, sites, equipment, jobs, visits, estimates and invoices. Load it only into an empty install, because sample and real records must not be mixed. A good habit is to explore on a separate test site and start your real work on a clean one.

03 Moving around

The left menu groups the screens. Each person sees only what their role allows; screens of the paid editions show a lock in Lite.

Menu	What is there
Dashboard	Today's and tomorrow's visits, visits never closed out, jobs to schedule, the next two weeks, tasks due, money owed, open estimates and agreements ending soon.
Dispatch board	One day, a column per technician, with the jobs waiting to be scheduled on the left.
Calendar	Month, week and list views of visits, tasks and holidays. Filter by technician or job type.
Jobs, Customers, Visits, Tasks, Equipment, Photos and files	Your records. Each list has search, filters, Add, Import and Export.
Booking requests, Estimates, Maintenance agreements, Billing, Price book, Customer portal	Paid editions.
Reports	Printable schedules, work orders, registers and statements.
Phone app	How to install JobDock on a phone or computer like an app.
Help	This guide.
Audit trail, Settings	For the owner and those allowed.

On a phone, tap ☰ at the top left to open the menu. Your name at the top right opens your profile, password, two-step sign-in and Sign out.

04 A day in the shop

Morning. Each person gets an email with their visits for today, visits not yet closed out, jobs waiting to be scheduled and new booking requests. The same view is on the dashboard. Print today's schedule from the dashboard for anyone who likes paper.

Dispatching. Open the **Dispatch board**. Jobs without a visit wait on the left: drag one onto a technician to book it on that day, or press **Book** and choose the time. Move a visit to another technician with the drop-down on its card. Use the arrows to plan tomorrow or next week.

In the field. A technician who signs in sees **My day**: their visits in order, with the address, gate and access notes, **Directions** and **Call**. On each visit:

1. **On my way.** The office sees it, and with a paid edition a text for the customer is ready to send from the technician's own phone.
2. **Arrived.** The time on site starts counting.
3. **Finish.** Choose how it went (completed, need to come back, or no access), write what was done, add labor hours to bill, and either close the job or book the next visit in the same save.

Evening. Check the dashboard: **Past visits never closed out** and **To schedule** should both be empty. With a paid edition, tomorrow's schedule also arrives by email after 6 pm.

05 Customers, sites and equipment

Customers. Residential or commercial, with mobile, email, billing address, how they found you and whether they are tax exempt. Turn off "Email this customer before each visit" for anyone who should not get reminders. A customer's page has tabs for their jobs, service sites, equipment, estimates, agreements and invoices.

Service sites. The addresses you work at. A customer can have several (a landlord's rentals, a chain's stores). Each site has the on-site contact, access notes and the **gate, lockbox or alarm code**, which is stored encrypted and shown only to people who may edit the job.

Equipment. The furnace, condenser, water heater or panel at a site: make, model, serial number, size, refrigerant or fuel, install date and parts and labor warranty dates. The job page shows the equipment at the site, and the Equipment and warranties report lists what goes out of warranty soon.

06 Jobs and visits

A **job** is the work the customer asked for: "AC not cooling upstairs". It has a job number such as `JOB-2026-0001` (change the prefix in Settings → Company), a job type, priority (normal, urgent or emergency), the problem as the customer described it, the lead technician and a helper, and a status from New to Completed.

A **visit** is one trip to the site, with a date and an arrival window such as 8:00–10:00 AM. A job can need several visits: diagnose, wait for the part, come back to install. When you add a new job you can book its first visit straight away.

The job page shows everything about one job: the next visit, every visit with what was done, parts and labor, photos and files, tasks, estimates, invoices and payments, and the change history. Print the **Work order** to hand to a technician or have the customer sign.

Deleting. Only the owner deletes by default. A deleted record moves to Deleted items with the reason, and the owner can restore it.

07 Calendar and holidays

The calendar shows visits, tasks and holidays together, colored by job type. Click a day to see it on the side, or open the board for that day. Filter by technician or job type.

Holidays. US federal holidays are loaded for this year and next. Add the days your shop is closed under Settings → Lists → Holidays, as "Our own closed days". To add another year, use Settings → Schedule.

Phone calendar (paid editions). Calendar → Phone calendar gives each person a private link that shows their visits in Google Calendar, an iPhone or Outlook, next to their own appointments. Make a new link at any time to cancel the old one.

08 Photos and files

Keep before and after photos, permits, warranty registrations, manuals and signed forms against the job or the customer. On a phone, **Add photo or file** opens the camera. Files are stored privately on your website, outside public reach, and can only be opened by signed-in people allowed to see that job. The largest file allowed is 25 MB or your host's upload limit, whichever is smaller.

Paid editions add file versions, share links that expire (for an inspector or a home warranty company), a download log, and **Share with the customer** in the customer portal.

09 Billing (paid editions)

Price book. Your flat-rate services, parts, materials, labor rates, fees and discounts, each with your price, your cost and whether it is taxable. Set your standard labor rate under Settings → Company.

Parts and labor on the job. Add lines from the price book or type them. Labor hours a technician enters when finishing a visit go on the job at your standard rate. The job page shows what you charged, what the parts and labor cost you, and the margin.

Invoices. **Invoice** on a job (or Billing → New invoice) collects every line not yet invoiced. Sales tax is charged only on taxable lines; a tax-exempt customer is never charged. Invoices are numbered `INV-2026-0001` and print on your letterhead with your payment instructions and your **Pay now** link (a Square, Stripe or PayPal payment page you set up in Settings → Company). Email or text the invoice from its page. An invoice is never deleted: void it, and its lines go back to "not yet invoiced".

Payments. Record card, cash, check, ACH, Zelle, Venmo, PayPal or financing payments against an invoice, or as a deposit on the job. Each payment has a printable receipt.

Who owes what. Billing shows what each customer owes, aged by 30, 60 and 90 days, with a one-tap reminder text or email. Reports add the payments register, invoice register, sales tax summary, customer statement and work not yet invoiced.

Which services are taxable depends on your state. Check with your accountant and set the default sales tax rate and whether labor is taxed in Settings → Company.

10 Estimates (paid editions)

Build an estimate from the price book with up to three options, for example **Good** (repair), **Better** (new system) and **Best** (high-efficiency heat pump). Your cost and margin show while you build it and are never shown to the customer.

Send for approval emails the customer a private link. They open it on their phone, choose an option, type their name and approve. You can ask for a one-time code by email first for large jobs. While an estimate is out it is locked; **Withdraw to change** takes it back. If the customer says yes in front of you, use **Approved in person**.

Approval creates the job (or updates the one the estimate came from) with the chosen lines on it, ready to schedule and invoice. Estimate results shows your close rate and which option customers choose.

11 Maintenance agreements (paid editions)

A maintenance agreement is a plan such as "Comfort Club: two tune-ups a year, 15% off repairs". Set the visits per year, the price, how it is billed (once, monthly or quarterly), the job type for its visits and the technician. With **Create visit jobs automatically** on, JobDock creates each tune-up job a set number of days before it is due, and the next due date moves forward. **Invoice** bills one period; **Renew** starts the next term on the same terms. Agreements ending in the next 30 days show on the dashboard.

12 Booking requests and the customer portal (paid editions)

Booking requests. Put the shortcode `[jobdock_booking]` on any page of your website. Visitors choose the service, a preferred day and time of day, and describe the problem. Only the ZIP codes you serve are accepted (Settings → Booking and estimates), and spam is stopped without a puzzle for real visitors. Requests appear under Booking requests and in your email. **Create job** turns a request into a customer, a service site and a job in one click, and uses an existing customer when the phone or email matches.

Customer portal. Give a customer a login from their customer page (**Give login**). They sign in at the same address your team uses and see only their own page: upcoming visits with the arrival window and the technician's first name, their jobs and the work done, their equipment and warranty dates, shared photos and files, estimates to approve, invoices with your Pay now link, a request form for the next visit, and messages to your office. Office notes, gate codes, costs and other customers are never shown. You can take the login away at any time; their records stay.

13 Reports

Every report prints on your letterhead. In the print window choose **Save as PDF** to get a PDF; every report can also be exported to CSV for Excel.

Report	Edition
Daily schedule, Visit calendar, Jobs waiting for a visit, Work order	All
Who owes you (aging), Payments received, Customer statement, Work not yet invoiced	Paid (billing)
Customer service history, Equipment and warranties, Callbacks	Paid
Technician productivity, Task list by person, Where new customers come from	Paid
Job profit, Revenue by job type, Invoice register, Sales tax summary	Paid
Estimate results, Maintenance agreements	Paid

14 Bringing in your existing customers

Every list has an **Import** button with a template and an example file. Fill the template in Excel, save it as CSV, and upload it. Nothing is saved until **Check file** has shown every problem row by row. Dates may be written as mm/dd/yyyy.

Import in this order:

1. `customers.csv`: your customers with their addresses.
2. `price-book.csv` (paid editions): your services, parts and labor rates.
3. `jobs.csv` (paid editions): open jobs, with an optional first visit date and arrival window. A customer named in the file who is not in your list yet is created for you. In Lite, add jobs one by one.
4. `equipment.csv`: equipment at your customers' sites.

15 Users, roles and permissions

Adding a person. Settings → Users → Add user: name, email, mobile, a password (at least 10 characters with letters and numbers) and a role. Share the username and password with them; they sign in at yoursite.com/app/. People are deactivated, never deleted, so their history stays readable. Lite allows 2 users, Owner-operator 3, Team 10 and Business 25.

The built-in roles

Role	What they do
Owner / Admin	Everything, including delete, settings and users. Cannot be changed.
Office manager / dispatcher	Customers, jobs, the schedule, estimates, billing and reports for the whole company. Cannot delete unless the owner allows it.
Technician	Sees only the jobs and visits they are on, on the phone: on my way, arrived, finish, photos, parts and labor. Can write estimates. Never sees the money.
Comfort advisor / estimator	Customers, estimates and the jobs they become. Sees only their own estimates.
Bookkeeper	Invoices, payments and money reports. Sees customers and jobs but cannot change them.
Viewer	Read-only access to the schedule, jobs and reports.

Changing a role. Settings → Roles and permissions. Each area has View, Add, Edit, Delete and Export. You can create your own roles and turn on **Own records only** so a role sees just the jobs assigned to that person.

Safeguards that always apply: every delete needs a reason, kept in the audit trail; nobody can give a role more than they have themselves; staff never reach the WordPress admin area.

16 Emails and the scheduler

Settings → Emails:

- **Morning email** to each person at the hour you choose: their visits today, visits not closed out, jobs to schedule, new booking requests and tasks due.
- **Evening email** (paid editions) with tomorrow's schedule, after 6 pm on days when visits are booked.
- **Appointment reminders to customers** (paid editions): an email a set number of days before each visit, only to customers with an email address and reminders turned on. For example `2,1` sends one two days before and one the day before.
- **Review link**: your Google review page, added to the "job done" text so happy customers can leave a review.
- **Send me a test email** checks that your site can send email at all.

The scheduler. WordPress only runs scheduled jobs when someone visits the site, so on a quiet site the morning email and the agreement visit jobs can be hours late. Fix it once: in your hosting panel (Hostinger: Advanced → Cron Jobs) add a cron job that opens the address shown under Settings → Emails every 30 minutes. The dashboard warns the owner if the scheduler has not run for a day.

If emails do not arrive at all, your host may block WordPress mail. Install an SMTP plugin and connect it to your email account.

17 Use it like an app on your phone

JobDock can be installed on a phone, tablet or computer. It then opens full-screen from its own icon, straight to your day, like any other app. There is nothing to download from an app store. Open **Phone app** in the menu for the steps on the device you are using.

- **Android (Chrome):** open the app address, sign in, then tap ⋮ (top right) → **Install app** or **Add to Home screen**.
- **iPhone or iPad (Safari):** open the app address in Safari, sign in, tap the Share button (square with an arrow) → **Add to Home Screen** → Add.
- **Computer (Chrome or Edge):** open the app address and click the install icon at the right end of the address bar.

Installing needs HTTPS. Each person signs in once on each device. On a weak connection the app still shows the last screens it loaded; saving needs a connection.

18 Editions, Lite and Full

Edition	Price	Users	For
Lite	Free	2	Trying it out, or an owner with one technician
Owner-operator	$99 a year	3	An owner who runs the truck, plus a helper and the office
Team	$249 a year	10	A shop with 2 to 8 technicians and an office manager
Business	$449 a year	25	A growing company with several crews and dispatchers

Lite includes customers, sites, equipment, jobs, visits, the dispatch board, the calendar, tasks, photos and files, the morning email and the core reports. Every paid edition adds billing and the price book, estimates with approval online, maintenance agreements, the online booking form, the customer portal, file versions and sharing, all reports, importing jobs, appointment reminders, the evening email, the phone calendar feed and one-tap texts.

In Lite, paid screens are previews. Open any locked screen to see what it does with sample data. **What the paid editions add** (from the "You are on Lite" box in the menu) shows numbers from your own jobs, every paid screen as a preview, and the editions side by side.

Licence keys. A licence key, entered under Settings → Edition, unlocks the edition you bought in the Lite install, with nothing to reinstall. If a licence expires, the paid screens keep working; only updates stop until you renew. If your site cannot reach the licence server for more than a week, paid screens become read-only until it can. You are never locked out of your data: customers, jobs, the schedule and every export keep working.

19 Settings reference

Tab	What you set
Company	Name, line under the name, contractor license number, phone, email, website, address, EIN, number prefixes, default sales tax rate and whether labor is taxed, standard labor rate, payment terms, Pay now link, payment instructions, invoice footer and estimate terms.
Schedule	First day of the week, working hours, which holidays show, holidays for another year.
Emails	Morning and evening emails, customer reminders, review link, test email, the scheduler.
Booking and estimates	The website booking form, ZIP codes you serve, the email code for estimate approval, what the portal shows.
Users, Roles and permissions	People and what they may do.
Lists	Job types, price book, service sites, holidays and locations; starter packs for each trade.
Edition	Your edition, the licence key, and the editions compared.
Advanced (owner only)	The switches below.

Advanced settings, explained

- **App address.** The part after your site address where the app opens, `app` by default (yoursite.com/app/).
- **Open the app on the site's home page.** *On:* anyone opening your site's address goes straight to the JobDock sign-in and then the app, instead of your WordPress home page. Use it when the site exists only for JobDock, for example app.yourcompany.com. *Off:* your normal home page shows, and the app opens at its own address.
- **Require two-step sign-in for everyone.** Everyone must add an authenticator app and enter its 6-digit code at sign-in. Recommended: JobDock holds customer addresses and gate codes.
- **Delete all data when the plugin is deleted.** Leave off. When on, removing the plugin from WordPress erases every record and stored file.
- **Public demo.** Only for a separate showroom site filled with the sample data; see the next section.

20 Public demo (showroom sites only)

The public demo lets anyone try JobDock without signing up. Use it on a separate website kept only for demonstrations, never on your company's real site.

When it is on:

- The site's home page becomes a JobDock product page with a **Show Me The JobDock Demo** button.
- The button signs the visitor in to one shared demo account and opens the app with the sample company.
- The visitor can open every screen, but cannot add, change, delete or export anything. They cannot see users or the audit trail, change the password or reach the WordPress admin area.
- The sample dates move forward every day, so there are always visits today, tomorrow and next week.
- Administrators can still see the theme's own home page by adding `?jd_site=1` to the address.

Safety: the demo can only be switched on when every job on the site is from the sample data. One real job on the site and it refuses.

21 Security, privacy and your data

- **Your website, your data.** Everything is stored in your own WordPress database and uploads folder. Nothing is sent to JobDock or anyone else, apart from the licence key check with the licence server.
- **Access control** is checked on the server for every action, not just hidden on screen. A technician who opens another technician's job gets "not found", and a portal customer can never open another customer's records.
- **Audit trail:** every addition, edit, deletion, permission change, export and sign-in, with who, when, from where and why. Entries cannot be edited, and **Verify integrity** detects tampering in the database.
- **Sign-in protection:** after 5 wrong passwords an account is locked for 15 minutes. Two-step sign-in can be required for everyone.
- **Encryption:** gate, lockbox and alarm codes and your EIN are stored encrypted.
- **Public pages are hardened:** estimate approval links are long random tokens stored only as a hash, rate-limited, and expire; the booking form checks a signed timestamp, a hidden trap field and per-visitor limits.
- **Export at any time:** every list has an Export button that downloads a CSV file.
- **Backups:** JobDock does not back up your site. Turn on your host's daily backups (Hostinger: Websites → Backups) or use a backup plugin, and keep HTTPS on.
- **Privacy laws:** some states (for example California, Colorado, Virginia and Texas) have consumer privacy laws. JobDock helps with access control, logs and export, but the duties belong to your company: tell customers what you keep and why, keep your hosting secure, and report a breach as your state requires.

22 Troubleshooting and common questions

/app/ shows "page not found". WordPress → Settings → Permalinks → Save once.

The morning email does not arrive. Press Send me a test email under Settings → Emails. If even that does not arrive, install an SMTP plugin. If it arrives but the morning email is late, add the cron job shown on the same tab.

"Send as a text" opens my messages app but does not send. That is by design: the text is written for you and sent from your own phone, so the customer sees your number. Press send in your messages app.

Labor was not added when I finished a visit. Set your standard labor rate under Settings → Company.

I cannot find the Install option for the app. Open Phone app in the menu and follow the steps for your device. On iPhone, use Safari.

A screen shows a lock. It belongs to the paid editions. Open it to see a preview, or ask the owner about upgrading.

A technician left. Settings → Users → edit the person → turn off Active. Their history stays; they can no longer sign in.

I deleted something by mistake. The owner opens the list, clicks Deleted items, opens the record and presses Restore.

How do I move from Lite to Full, or upgrade to a new version? Upload the new zip under Plugins → Add New → Upload Plugin and choose Replace current with uploaded. Your data stays.