JobTracker User Guide

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JobTracker is a private/public job logbook and business tracker for jobs, estimates, invoices, payments, notes, mileage, receipts, photos, and backups. It works as a Progressive Web App, so it can be installed on a phone or desktop and used even when the connection is unreliable.

Quick Start

- Log in to the portal, then choose Private Workspace or Public Workspace.
- Use Private Workspace for your own device-based job file. It saves locally and can auto-upload per-device backups to the server.
- Use Public Workspace when the shared public job file should be loaded and saved through the server.
- Open Jobs to create or manage jobs. Open Overview for business totals, estimates, invoices, and current work.
- Use More for backups, imports, shared files, profile settings, notes, reports, and the user guide.

Portal And Workspaces

- Private Workspace keeps the main working data on the device, with optional/server auto-backups available through dev-mode logging options.
- Public Workspace saves to the server public workspace job file and keeps up to five public backups, deleting the oldest when the limit is reached.
- Shared Job Files are separate from the public workspace file and can hold unlimited manual uploads. When more than five files exist, the portal shows a scrollable file list.
- Public workspace files are download-only with normal login. The override password unlocks rename and delete actions for public files.
- The Portal button opens the server portal from inside the app. The active Private/Public badge shows which workspace is currently loaded.

Jobs Tab

- The Jobs tab lists every job, grouped by year. Pinned jobs appear in a dedicated Pinned Jobs section above regular jobs and can be reordered within the pinned section.
- Search by job name, client, address, group, notes, or year. Use the group filter to show jobs from one client group.
- Job statuses are Active, Delayed, Finished, and Inactive. Delayed is highlighted. Inactive jobs stay fully editable but do not count in Overview totals.
- Each job card shows client/address details, status, estimated/paid/owed information, tracked miles, hours, and quick payment access where applicable.
- Use the pin button to keep important jobs at the top. Use the up/down arrows to reorder jobs inside their pinned or regular section.

Creating And Editing Jobs

- Create a job with client, address, group, pricing type, Business Cost %, status, created date, and notes/scope.
- Hourly jobs start with Total Hours at 0 and update from actual logged hours. Bid jobs use a total bid price.
- Business Cost % is the job overhead percentage. If a linked estimate has overhead costs, that value syncs into the job. If the job has Business Cost % and the estimate does not, it can sync back to the estimate.
- Clients can have multiple saved addresses. Job creation lets you pick from the client address list or enter a custom address. The chosen address is saved permanently to the job.
- The edit job menu includes job notes, edit logged dailies, edit logged miles, edit logged payments, single-job export, invoice drafts, and estimate drafts.

Special Job Types

- None is the standard job type for normal hourly or bid work.
- Gas Receipts and Receipts are receipt-mode jobs. They only require date/time, expense type, expense amount, notes, and optional photos.
- Receipt jobs hide normal Revenue & Pricing and show Paid Expenses, Refunded, and Total Expenses instead.
- Odometer Log is for mileage-only tracking. It shows Distance Driven and can be used for business or personal mileage.
- Paid-To jobs are payment reference jobs used to track payments by client or group without normal job scope fields.

Job Overview

- Opening a job shows summary cards, actions, revenue/pricing, mileage, estimating data, payments, mileage logs, and daily logs.
- Revenue & Pricing, Mileage, and other overview sections collapse by default when reopening a job. Daily logs and estimating data stay easy to access.
- Expected Revenue reflects linked estimate totals where a linked estimate exists. Linked estimates can control a bid job total.
- Total Paid, Material Deposits, Expenses, Outstanding Balance, Discount Given, Overhead Cushion, and Overhead % are shown for financial clarity.
- The Notes button is full width. Estimate Draft and Invoice Draft sit side by side. Estimate Draft opens an existing linked estimate or creates one if none exists.

Inactive Jobs

- Inactive is a status for jobs you want to keep available without affecting business reporting.
- Nothing inside the job is locked or deleted. Daily logs, payments, notes, mileage, photos, estimates, and invoices remain available.
- Inactive jobs do not count in the Overview business snapshot, job counts, revenue, expected revenue, hours, mileage, expenses, or profit.
- Use the Inactive filter in the Jobs tab to find inactive jobs later.

Log Hours / Miles

- The Log Hours/Miles tab can log time, mileage, notes, and photos for a selected job.
- Hour logging can be manual or calculated from start/end times. If only a start or only an end time is entered, the app tracks the sequence and prompts for the next matching entry.
- Single Log mode only requires work notes, with optional photos, and creates a daily log entry without requiring hours or mileage.
- Receipt-mode jobs switch this screen into limited receipt entry with purchase/refund and expense amount fields.
- Odometer entries auto-timestamp when posted and do not require manual time entry.

Daily Logs

- Daily logs hold the date, posted time, hours or entry type, notes, and photos for work performed.
- Daily logs can be expanded/collapsed and reordered with arrows.
- Edit Logged Dailies lets you edit entries or delete multiple entries. Delete confirmations use a three-second countdown to help prevent accidents.
- Changing start/end times while editing a daily log recalculates total hours inside the edit popup.
- For Gas Receipts or Receipts jobs, daily logs are simplified to date/time, notes, photos, purchase/refund, and expense amount.

Mileage And Odometer Tracking

- Mileage uses start/end odometer readings so distance is calculated from actual vehicle readings rather than typed distance.
- Standard logging pairs a start reading with an end reading. The completed pair shows distance driven and total travel time.
- Continuous Logging supports multi-stop trips with more than two readings in one sequence.
- Mileage entries can be marked Business or Personal. Personal miles stay in the job but do not count toward Overview mileage totals.
- Mileage logs can be edited and deleted. The initial odometer entry cannot be changed once later entries depend on it, unless no later logs exist.

Photos

- Photos can be attached to daily logs and mileage logs.
- The app stores daily-log photos through IndexedDB so photos do not consume limited localStorage space.
- Server photo upload support stores uploaded photos in the server photos folder and references them from the app.
- Expanded photos include a download action for the currently viewed photo.
- Full-resolution photo mode is hidden behind dev mode. Normal app previews use compressed thumbnails for lighter storage.

Payments And Revenue

- Payments can be logged with amount, date, note, and payment type.
- Payment toward total balance reduces the outstanding balance. Additional payment/balance adjustment increases expected revenue.
- Balance adjustments on linked jobs can auto-create an estimate line called New - Balance Adjustment.
- Material deposits are tracked separately and appear as job expenses/material deposits.
- Payment editing is available from the Edit Job menu under Edit Logged Payments.

Estimates

- Estimates can be drafts, pending, accepted, or declined. Sent Estimates shows pending, accepted, and declined estimates.
- Estimate line items can be Labor, Material, or Adjustment. Labor/materials feed estimate totals and overhead. Adjustments are separate line items.
- Each estimate line can be Active or Inactive. Inactive lines stay saved for alternate quote options but do not count in totals, job revenue, CSV totals, or PDFs.
- Overhead costs % adds overhead to labor and materials. Discount subtracts from the final total.
- Changing an estimate linked job updates the estimate client and address. Accepting an estimate can create a job.

Invoices

- Invoices can be working drafts, pending payment, or paid.
- Final invoices created from a job can auto-fill Amount Owed from the outstanding balance.
- Final invoices linked to jobs check linked estimates for discounts and show the discount as subtracted where applicable.
- Estimate documents can also be exported as invoices using Export as Invoice.
- Sent invoices can be reviewed from Overview and marked pending payment or paid.

PDF Export Rules

- Exported estimates are clearly labeled Estimate at the top. Exported invoices are clearly labeled Invoice at the top.
- Only the document label is centered at the top; job titles are left aligned.
- Scope-only documents show labor and materials with overhead folded into those categories.
- Full documents spread overhead across active non-adjustment line items and exclude balance adjustments from overhead allocation.
- Inactive estimate lines are not included in exported PDF totals or exported line items.

Clients

- Clients store name, company, phone, email, notes, and multiple addresses.
- If no company applies, the app fills N/A so the client record stays complete.

- Client detail pages list linked jobs and linked notes. Jobs are clickable from the client page.
- New notes can be assigned to an existing client from a dropdown.
- Deleting clients uses a three-second countdown before confirmation.

Notes

- Notes can be created from More or from inside a job.
- Notes can be linked to a client and/or job, then filtered by linked job in the Notes view.
- Note titles are underlined so separate notes are easier to identify.
- Notes can be reordered with arrows.
- Merged note imports append only missing information below existing information instead of overwriting or duplicating everything.

Overview Tab

- Overview shows the Business Snapshot, Estimates & Invoices, Active & Delayed Jobs, Sent Estimates, Sent Invoices, and other business summaries.
- Business Snapshot can be filtered by client and/or year. If no filter is selected, it shows overall totals.
- Profit YTD and Total Expenses are shown at the top of the snapshot. Revenue, expected revenue, total hours, tracked miles, and job counts are shown below.
- Active & Delayed Jobs shows a maximum of five jobs before becoming scrollable.
- Inactive jobs are excluded from overview totals and active/delayed overview lists.

Reports And CSV Export

- Job Data Report exports job summary data with numeric totals at the bottom.
- Date Report exports dated log information.
- Estimates CSV includes estimate line data, active/inactive state, subtotal, discount, and grand total.
- CSV files include a highlighted/frozen-style top row where supported by the viewing app.
- Downloaded reports can be shared to email, messaging apps, or saved on supported mobile browsers through the device share sheet.

Backups, Imports, And Shared Files

- Export All Data creates a JSON backup of jobs, clients, estimates, notes, and invoices. You can name the backup before saving.
- Import Data smart-merges incoming data. Existing information is not overwritten; only missing records or missing note/job text are added.
- Single-job export is available from a job overview menu and includes the job plus related client, estimates, notes, and invoices.
- Estimate-only and invoice-only JSON files can be imported directly.
- Upload Backup allows renaming a selected file before upload. Upload failures show an unsuccessful message.

Auto-Save And Auto-Backups

- Public mode auto-saves changed public workspace data to the server every 60 seconds and keeps five backups.
- Private mode keeps the primary auto-save locally and overwrites that local backup to save device space.
- Private mode also uploads secondary per-device server auto-backups every 60 seconds, keeping up to five per device.
- Auto-Backups are available from the dev-mode logging options menu.
- Offline public uploads are queued and retried when the connection returns.

More Tab And Settings

- More contains profile/company info, notes, backups, import/export, reports, portal tools, app settings, changelog, and this user guide.
- The changelog is hidden until dev mode is enabled.
- Timestamp and full-resolution photo settings are hidden until dev mode is enabled. Timestamping is on by default and can be toggled off.
- The Edit Portal Upload Location button is hidden unless dev mode is on.
- The user guide can be opened from inside the app without downloading it.

Delete Safety

- Delete actions use a three-second countdown wherever practical, including clients, estimates, invoices, daily logs, mileage logs, notes, and shared files.
- Some edit menus allow selecting multiple entries for deletion after opening the edit list.
- Dev mode may bypass certain countdowns for testing, but normal production use is designed to slow down accidental deletes.

Best Practices

- Use clear job names and groups so search, filters, and exports stay organized.
- Use inactive status for old test jobs, canceled jobs, or archived jobs that should not affect Overview totals.
- Use inactive estimate lines for optional client choices, alternates, or phases that should be saved but not priced in the current quote.
- Export a backup before major imports or large cleanup sessions.
- After uploading a new app version, refresh or reopen the PWA so the service worker can load the newest cache.