Job Pulse Quick Start

Version 1.0 — November 2026

The day-one path in one short guide. Every step ends with the chapter of the full User Manual that covers it.

Getting in

- **Your setup link.** You don't create your own account: Job Pulse emails you a setup link. It works once and stays valid for 7 days. Set a password (12–256 characters), then sign in. If the link expires, an Administrator can send a fresh one from **Team Access**. (Manual Ch 2)
- **Forgot your password?** On the sign-in page choose **Forgot password** and enter your email. The reset link is valid for 30 minutes, works once, and you can request one up to 3 times an hour. (Manual Ch 3)
- **Your role.** An **Administrator** runs the company and sees everything in it. A **Project Manager** works only the jobs assigned to their PM code. (Manual Ch 4)

The path: one job, start to finish

The numbers below are the manual's worked example: **Demo Electric Co.** and job **D-101, the Riverside Clinic Fit-out** — a $100,000 contract with Sample Builders LLC.

1. **Set your T&M rates (once, only if you do T&M work).** In **Settings → Time & Materials Pricing**, enter your labor rate and markups and click **Save T&M pricing**. Demo Electric Co. uses $125/hr, 15% on materials, 10% on equipment. (Manual Ch 16)
2. **Create the job. Jobs → New Job**: job number, name, customer, and contract value, then the billing method — quoted price or time & materials. ⚠ **Choose cost tracking (At job level or By scope) carefully. It locks with your first cost entry.** Then add your scopes with their estimates. Check the review screen, then click **Create Job**. (Manual Ch 6)
3. **Set up the Schedule of Values (SOV).** These are the line items your customer sees on each pay app. D-101's are Rough-in $40,000, Trim $25,000, Switchgear $35,000 — they must add up **exactly** to the contract. Set the two retainage percentages here too (D-101: 5% and 5%). (Manual Ch 7)
4. **Every week: record costs and update percent complete.** Costs go on the job's **Cost tracking** tab, each with a work description. Update each scope's percent complete there too, in the **% complete (current)** field on each scope's card. (Manual Ch 8 and 9)
5. **Change orders move in one order:** Pending → Submitted → Approved → Signed → Executed. Signed updates your margins; Executed adds the CO to the SOV so you can

bill it. D-101's CO-01, "Added receptacles", is $10,000, executed Sep 15. (Manual Ch 10)

6. **Bill at month end.** In **Billing & A/R**, click **Create SOV application**. Set **Work completed through** to the last day of the period (it starts out at today's date — change it), enter the period's progress, and check the preview: it shows exactly what the issued pay app will say. D-101's August app: $12,000 billed, $600 retainage, **$11,400** due — and no CO-01, because it wasn't executed until Sep 15. (Manual Ch 11)
7. **Record the sent date the day you send it.** Click **Record sent date** on the issued pay app, confirm the payment terms, and confirm with **Record permanent fact**. Only now is it money owed to you: it gets a due date (D-101's August app: sent Aug 31 + 30 days = due Sep 30), shows in A/R and aging, and can receive cash. (Manual Ch 12)
8. **Apply the check when it comes.** Record it in **Cash receipts**, then allocate it to the open pay app. A partly covered pay app shows **Partially paid**; you can't apply more than what's still owed. (Manual Ch 13)
9. **Work late money in Collections.** The worklist shows open bills worst first, as of today. Log every call and email, and record a payment promise — one open promise per bill. (Manual Ch 14)
10. **Close out.** Use **Reduce retainage** to bring both rates to 0% with a note, then **Review reduction** and confirm. Then create a final pay app with 0 work this period. On D-101 that releases $5,500 — line 5 reads $0 and line 8 reads $5,500. (Manual Ch 15)

T&M in 30 seconds

On a T&M job you bill the work actually recorded, at the rates from step 1 — the result is a **T&M bill**, not a pay app. Write clear descriptions; they print on the invoice as the work performed. At billing time, open the job's billing cycle in **Billing & A/R** and work in this order: 1. **Settle the proof question first.** Attach time sheets and receipts under **Evidence** (**T&M proof required**), then click **Verify T&M**. Or, in the **No T&M proof required** panel, type a reason and click **Record no T&M required**. If you record the skip, neither document below is required. 2. **Open draft → Figure from recorded work.** At Demo Electric Co.'s rates, 20 labor hours, $800 of materials, and $200 of equipment figure to a **Gross billed** of $3,640. (The header shows $0 until you submit. That's normal.) 3. **Attach your internal draft** (unless you recorded the skip), then click **Submit for review**. Submitting creates the official invoice — its number is assigned and its breakdown is frozen. 4. **Download T&M invoice (PDF)** and send that PDF to the customer — it is the bill of record. 5. **An administrator posts it:** attach proof you sent it (unless you recorded the skip), then **Review and post external submission**. You can re-download the invoice any time. (Manual Ch 16)

⚠ Can't undo — four permanent steps

- **Cost tracking:** the At job level or By scope choice locks with your first cost entry. (Manual Ch 6)
- **Change order executed date:** it decides which pay app's month the CO is billed in. (Manual Ch 10)
- **Issuing a pay app:** the issued figures are frozen and can't be edited afterward. (Manual Ch 11)
- **Record sent date:** the sent date is permanent once saved. (Manual Ch 12)

What Job Pulse doesn't do yet

No daily logs or crew/overtime fields; materials are recorded in dollars only; there is no QuickBooks or payroll link; and there is no import for a job that is already partway through billing. (Manual Ch 1)