

ServicePocket

User manual for shop owners

Your service business. In your pocket.

1. Getting started
2. Your services, products and prices
3. Customers, units and places
4. Jobs, scheduling and the calendar
5. Quotes
6. On the job: the work order
7. Finishing and service reports
8. Money: payments, receipts and statements
9. Follow-ups, service plans and texts
10. Reports and insights
11. Working as a team
12. Your data and backups
13. Plans and prices
14. Settings, and when something goes wrong
15. Words used in the app

servicepocket.app

1. Getting started

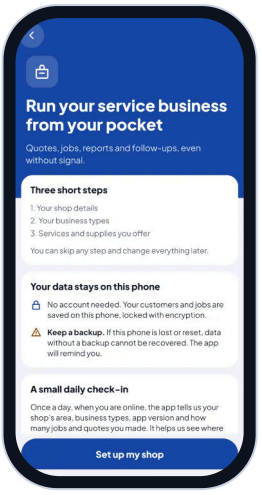
Set up your shop in three short steps, then find your way around Home, the tabs, Search and Help.

Your first time in the app

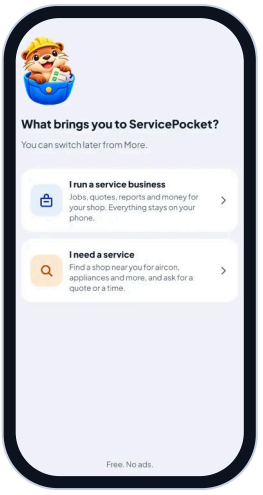
ServicePocket keeps your customers, jobs and money on your phone, locked with encryption. You need no account to start.

If the app first asks **What brings you to ServicePocket?**, tap **I run a service business**. You can switch later from More.

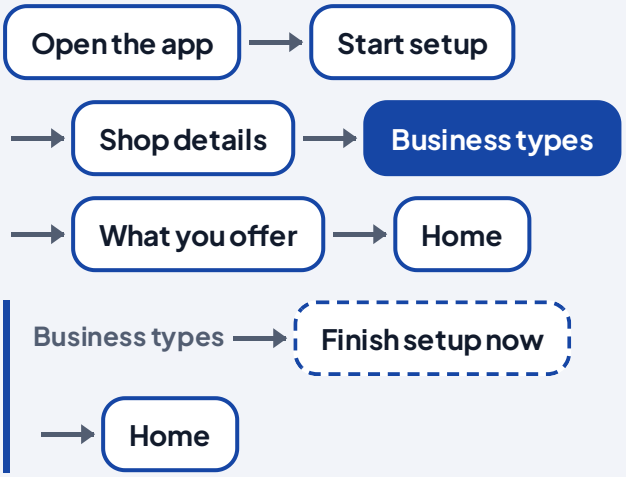
Then tap **Start setup** on Home, and **Set up my shop**. Setup has three short steps, and you can skip any of them and change everything later.



1 Three short steps, and what stays on your phone.



2 Tap I run a service business.

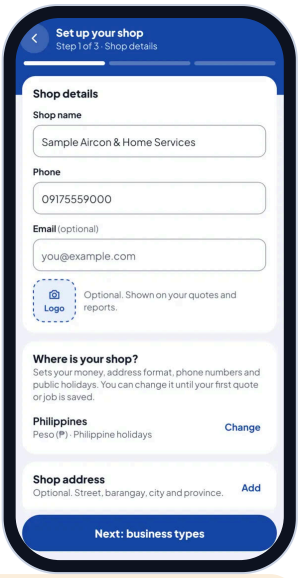


Note: Once a day, when you are online, the app tells us your shop's area, business types, app version and how many jobs and quotes you made. It never sends your customers, prices, photos or notes. Tap **What exactly is sent** on the setup screen to see it all.

Moving from another phone? On Home, tap **Restore from a backup** instead of setting up a new shop. If you were invited to a team, tap **Join with an invite code**.

Step 1: Shop details

1. Type your **Shop name** and **Phone**. Both are needed, because your customers reach you on that number.
2. Add your **Email** if you like.
3. Tap **Logo** to put your logo on your quotes and reports. A square picture works best.
4. Under **Where is your shop?**, check the country. It sets your money, address format, phone numbers and public holidays.
5. Add your **Shop address**: street, barangay, city or municipality and province. It is optional.
6. Tap **Next: business types**.



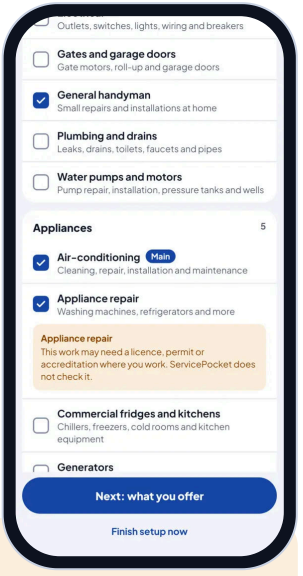
Step 1: your shop's name, phone and logo.

Note: The country is fixed once your shop has quotes or jobs, so check it now.

Step 2: Business types

Pick every kind of work your shop does, such as Aircon service and Appliance repair. The app suggests services and supplies for each one.

1. Tick each business type that fits. Type in the search box, for example "plumber", to find one fast.
2. If you picked more than one, choose the **Main business type**. It sets the defaults for new jobs.
3. Tap **Next: what you offer**, or **Finish setup now** to skip the suggestions.



Step 2: tick your business types.

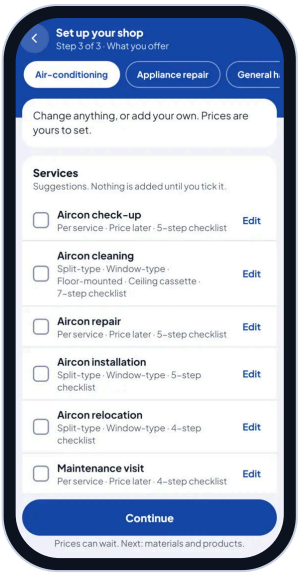
Note: Some work may need a licence, permit or accreditation where you work. ServicePocket does not check it.

Step 3: What you offer

The app shows suggested services for your business types. Nothing is added until you tick it, and the prices are yours to set.

1. Tick the services you offer, or tap **Pick all**.
2. Tap a service to change its name, price or choices before adding it, then tap **Save and pick**. Prices can wait: leave one empty and it says **Price later**.
3. Missing something? Tap **Add your own service**.
4. Tap **Continue**, then do the same for materials and supplies, products, packages, and types and brands.
5. Tap **Add my picks and finish**.

Some services come with a checklist and their usual materials. They are added with the service, and you can change them later in your catalog.



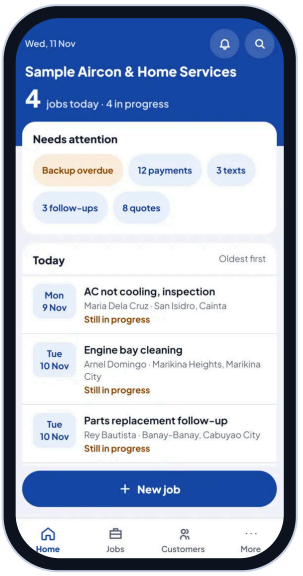
Step 3: tick the services you offer.

Home and the tabs

Home shows your day at a glance. At the top are today's date, your shop's name and how many jobs you have today.

- **Needs attention**: small buttons for what needs you, such as jobs past their time, payments, texts, follow-ups and quotes waiting. Tap one to jump to it.
- **Today**: today's jobs, in time order. A job still in progress from an earlier day says **Still in progress**.
- **Coming up**: on a day with no jobs, your next few jobs.
- **Waiting for payment** and **Waiting on customer**: finished jobs not fully paid, and quotes waiting for an answer.
- **Good to do**: reminders such as making a backup, with **Not now** to put one off.

Tap **New job** at the bottom to add a job from Home.
Four tabs sit at the bottom of the screen.



Home: Needs attention, then today's jobs.

- **Home**: your day.
- **Jobs**: every open job, finished and cancelled jobs, and the calendar.
- **Customers**: the people you work for, with their units and places.
- **More**: your catalog, settings, follow-ups, texts to send, reports and help.

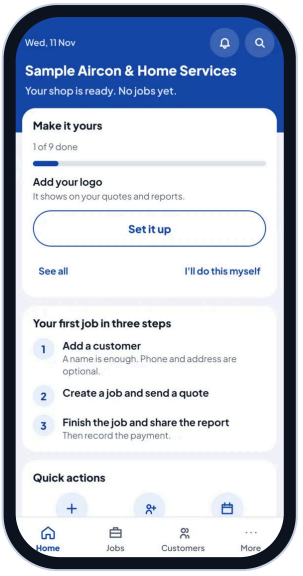
Every screen above the tabs has a round **Home** button at the top right. It takes you straight back to Home. If you typed something not saved yet, the app asks first, so nothing is lost by mistake.

Make it yours

After setup, Home shows a **Make it yours** card. It is a short list of things that make the app feel like your own shop.

- Add your logo.
- Set your working hours and days off.
- Put prices on your services.
- Show your GCash or Maya number on quotes, and add your QR picture.
- Add a link to your review page.
- Look at the texts the app prepares.
- Make your first backup.

1. Tap **Set it up** on the card to go straight to the next item.
2. Tap **See all** to see the whole list.



Make it yours: one thing at a time.

Each one ticks itself when it is done. Tap **I'll do this myself** to hide the card for good; the list stays in More, under Help.

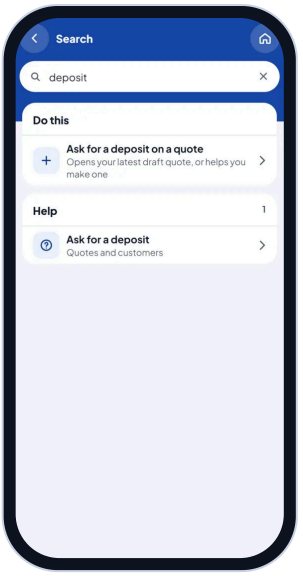
Pro: Picking a document colour, your terms and the customer's signature is part of Pro, and so is inviting a helper.

Search

Tap the magnifier at the top of Home or More to open **Search**. Type what you want in your own words, such as "deposit", "logo" or a customer's name.
Search shows:

- **Do this**: actions, such as Add a customer or Back up my data now. Tap one to go there.
- **Settings and features**: every setting, with where it lives.
- **Help**: the How do I... guides.
- **Customers**, **Units and places**, **Jobs** and **Quotes**: your records, by name, phone, J- or Q-number, serial or plate.

Jobs and Customers have their own search box. When it finds nothing, tap **Search everywhere for** your words to look in Search instead.



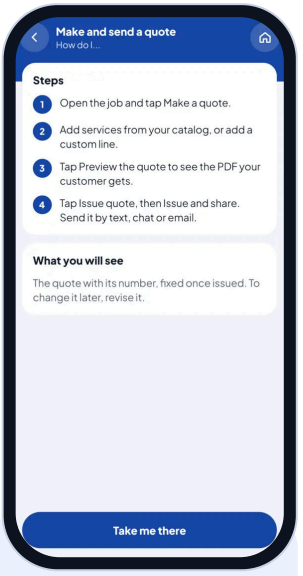
Search finds actions, settings, help and records.

Help

Short guides answer the common questions, such as how to make a quote or record a payment. They are in the app, so they work with no signal.

1. Open **More** and tap **How do I...** under Help.
2. Pick a guide, or type in **Search help**.
3. Read the steps and **What you will see**.
4. Tap **Take me there** to go straight to the right screen.

Busy screens, such as a quote, the work order and a customer, have a **?** at the top. Tap it for the guide about that screen.



A guide, with Take me there.

Tip: Help also has **Full user manual**, which opens this manual as a PDF.

2. Your services, products and prices

Your catalog holds everything you sell and use, at your own prices, so a quote takes a few taps.

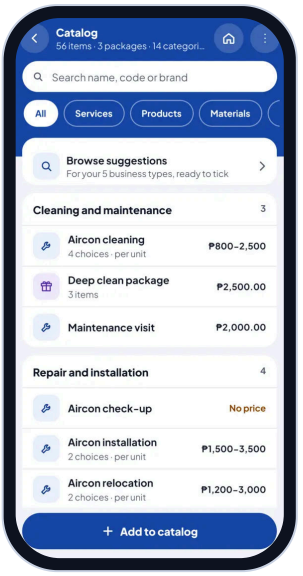
What goes in your catalog

Open **More**, then **Catalog**. Everything you offer is here, grouped by category. There are four kinds of item:

- **Service**: work you do, like aircon cleaning or a repair visit.
- **Product or part**: something the customer keeps, like a capacitor or a remote.
- **Material or supply**: used up on the job, like refrigerant or cleaning solution. You charge it, or keep it as your own cost.
- **Package**: several items sold together at one price.

Use the chips at the top, **Services**, **Products**, **Materials** and **Packages**, to show one kind. The search box finds an item by name, code or brand.

Quotes take their prices from your catalog. Changing a price changes new quotes and jobs only; lines already on a quote never change.



Your catalog, grouped by category.

Tip: Items with no price show **No price**. On Home, the Make it yours item **Put prices on your services** opens a list of only those, so you can price them one by one.

Add an item

1. In Catalog, tap **Add to catalog**.
2. Pick what you are adding: **Service**, **Product or part**, **Material or supply** or **Package**.
3. Type the **Name**, and pick a **Category** if you like.
4. Check **Priced per**. Services start per service, products and materials per piece.
5. Type the **Price** the customer pays. Add **Your cost** too, if you know it: only you see it, and it shows you your margin.
6. Tap **Save**.

For a product or material you can also pick a **Brand**. Under **What the customer sees**, add a short description; it shows under the name on quotes and reports. Under **More details** you can add up to 3 photos and a code, such as ACC-01. Photos are never on quotes.

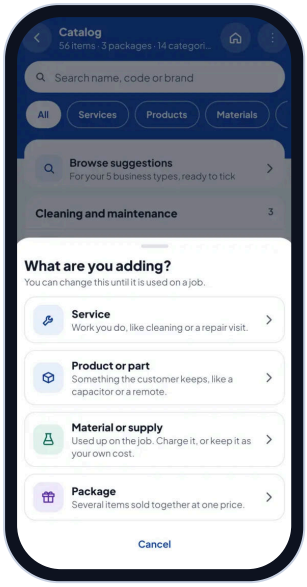
For a material, choose under **Charging the customer**:

- **Charge the customer**: it goes on the quote at its price.
- **My cost only**: never charged or shown to the customer. It counts toward your job cost, so your margin is right.

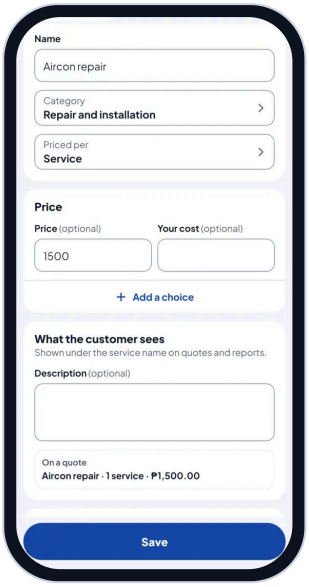
You can still switch this on each job line.

> **Note:** Once an item is used on a job, its kind is fixed. To change it, archive it and add a new one.

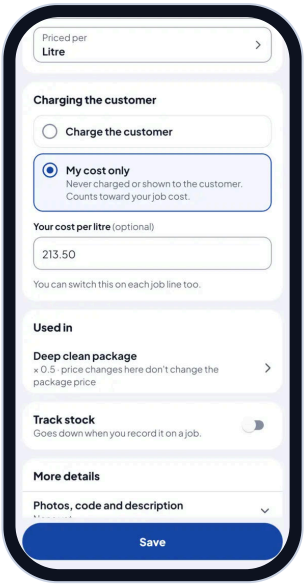
To see how a price changed over time, tap **Price history** on the item.



1 Pick what you are adding.



2 A service with its price and your cost.



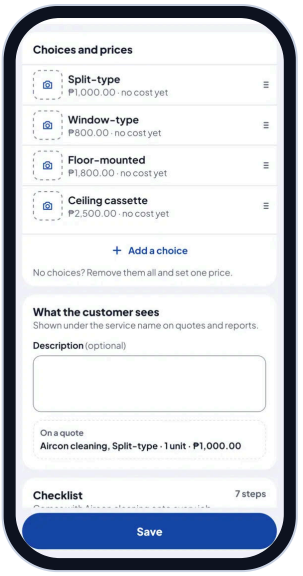
3 A material: charge it, or keep it as your cost.

Choices with their own prices

Many services cost more for bigger work, such as a 1.0 HP and a 2.0 HP aircon, or a sedan and an SUV. Give the item choices, each with its own price.

1. Open the item.
2. In its **Price** card, tap **Add a choice**.
3. Type the **Choice name**, such as "Split type, 1.5 HP", and its price, such as ₱1,500.00.
4. Add your cost for each choice if you know it.
5. Tap **Save**.

When you add the item to a quote, the app asks which choice fits. A choice can have its own photo and code too. No choices needed after all? Remove them all and set one price.



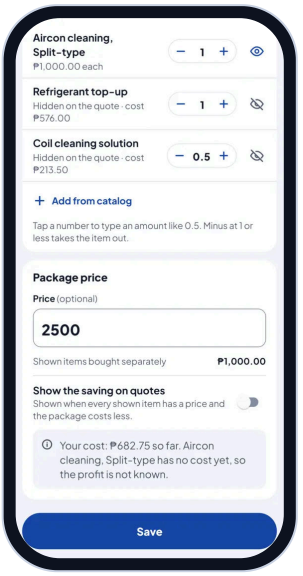
Choices, each with its own price.

Packages

A package sells several items together at one price, such as "Aircon cleaning and freon top-up".

1. Tap **Add to catalog**, then **Package**.
2. Type the name.
3. Under **What's inside**, tap **Add from catalog** and pick the items. Set how many of each go in one package.
4. Tap the eye on an item to show or hide it on the quote. Materials start hidden.
5. Type the **Package price**.
6. Tap **Save**.

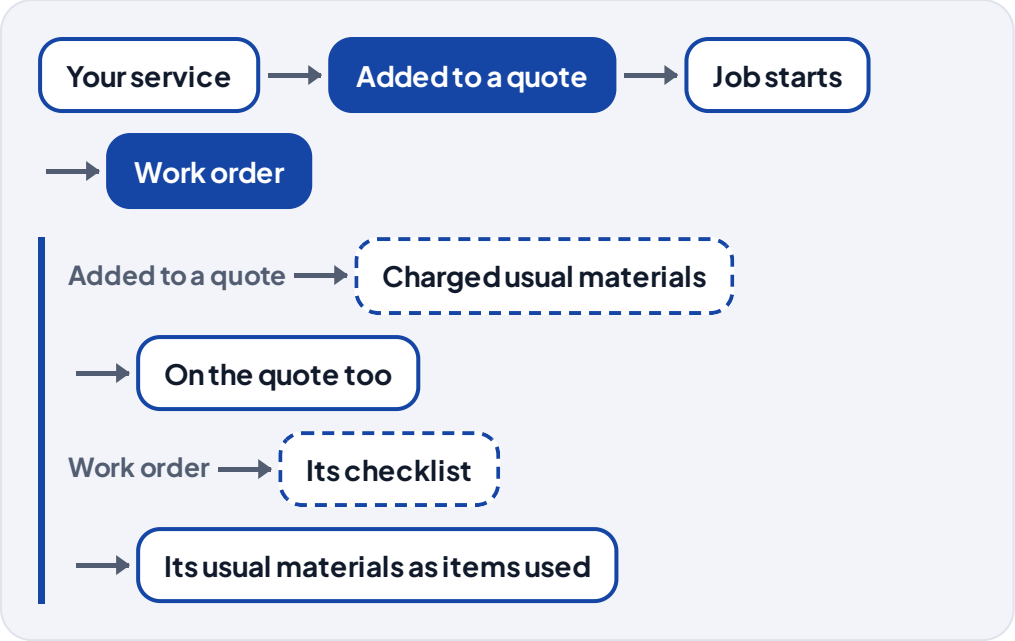
The app shows what the shown items cost bought separately, what the customer saves, and your profit at this price. Switch on **Show the saving on quotes** to print "Separately ₱2,800.00, you save ₱300.00". A package cannot hold another package.

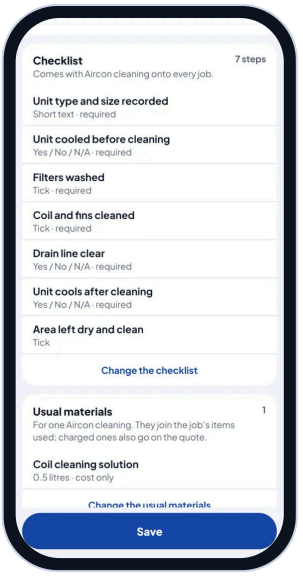


A package: what's inside, its price and the saving.

Checklists and usual materials for a service

A service can bring its own checklist and usual materials to every job. For example, aircon cleaning can bring the steps you always do, and a sachet of cleaning solution.





A service's checklist and usual materials.

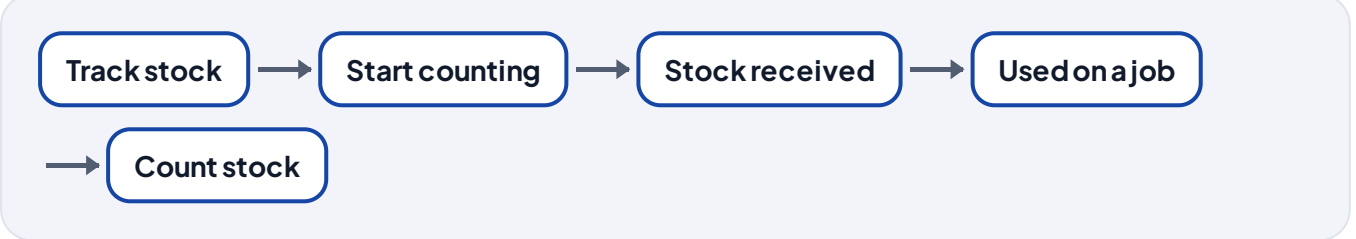
1. Open the service in your catalog.
2. Under **Checklist**, tap **Add a checklist**.
3. Tap **Add a step**, type it, and pick the answer: **Tick**, **Yes / No / N/A**, **Short text** or **Number**.
4. Switch on **Required** for steps that must be answered. A job can still be finished without one; the missing step is flagged.
5. Tap **Save**.
6. Back on the service, under **Usual materials**, tap **Add a material to** and the service's name, then pick what one service uses, and how much.
7. Tap **Save**.

Usual materials that are charged also go on the quote. Ones that are your cost only stay off the quote and count in your costs. Jobs already started keep the steps and items they started with.

Tip: Tap **Copy steps from another checklist** to start from a list you already have.

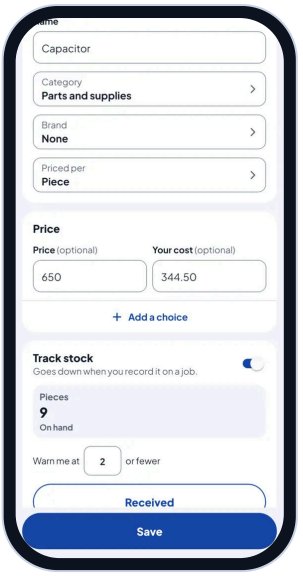
Count your stock

For products and materials you can let the app count your stock. It never blocks a quote or a job.



1. Open the item and switch on **Track stock**.
2. Type **How many do you have now?**, then tap **Start counting**.
3. Set **Warn me at** to see **Low stock** when you run low.
4. When new stock comes in, tap **Received** and type how many and the cost each.
5. Now and then, tap **Count stock** and type what you really have.

When a job that used the item is finished, the count goes down by what you recorded on its work order. If a job used more than the app had, the item shows **Count needed** until you count it. For an item with choices, each choice is counted on its own.
Tap **Stock history** to see every entry. Entries cannot be edited: to fix one, tap it and choose **Undo this entry**.



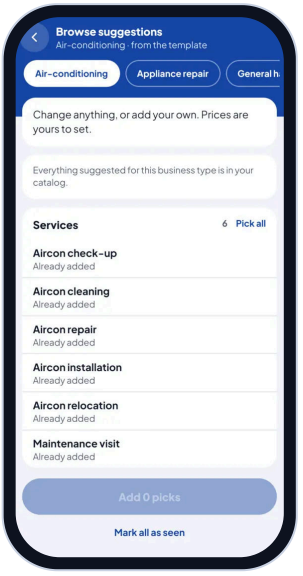
Stock on hand, with Received and Count stock.

Suggestions for your business types

Your business types come with suggested services, materials, products and packages. You can add more of them at any time.

1. In Catalog, tap **Browse suggestions**.
2. Tick what you offer. Items already in your catalog say **Already added**.
3. Tap **Add** with the number of picks.

A **New suggestions** card shows when new ones arrive for your business types. Things you archived or deleted are kept apart under **Removed earlier**, so nothing comes back by itself; tap **Add again** to bring one back.
To change your business types, open **More**, **Settings**, then **Business types**. When you add one, the app offers its suggestions after you save. When you remove one, it asks whether to keep or archive the items that came from it.



Suggestions for your business types, ready to tick.

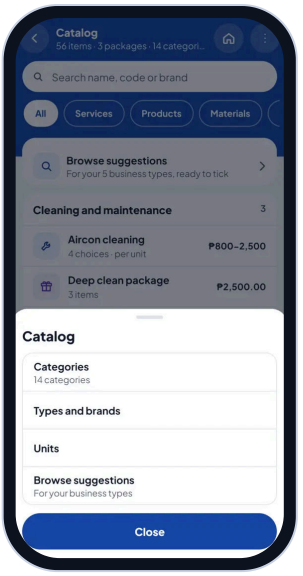
Group and tidy your catalog

Tap the menu at the top of Catalog for these:

- **Categories**: add, rename, reorder or archive the groups in your catalog.

- **Types and brands**: the lists used on items and on customer units, such as aircon and appliance types, brands and vehicle makes.
- **Units**: the standard units, and your own, such as "bottle" and "bottles".
- **Archived**: items, choices and packages you archived.

To stop offering an item, open it, tap the menu and choose **Archive**. It is hidden from your lists, but kept on past jobs, quotes and reports. Bring it back from **Archived** with **Unarchive**.
Delete removes an item for good, but only one that was never used on a job, a quote or a package.



Categories, types and brands, units and archived items.

Pro: In Pro Team, a service also has **Who can do it**: the people who do it, how many are needed, and any licence it needs. The app uses it to suggest who to send.

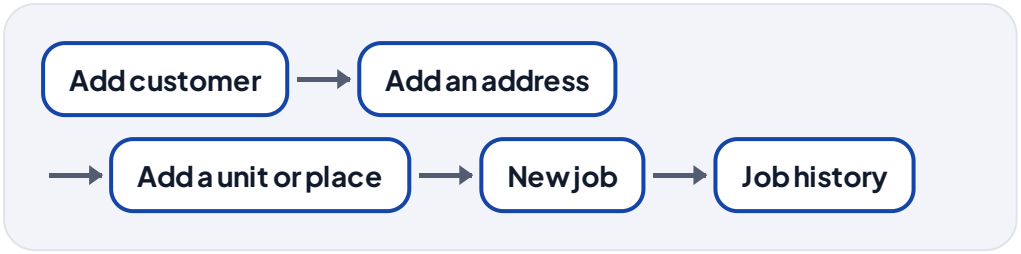
3. Customers, units and places

Keep each customer's phone, addresses and the things you service for them in one place, with their whole job history.

Your customers

Tap the **Customers** tab to see everyone you work for, from A to Z. Each row shows the customer's next or last job.

Type a name, phone number or address in the search box to find one fast.



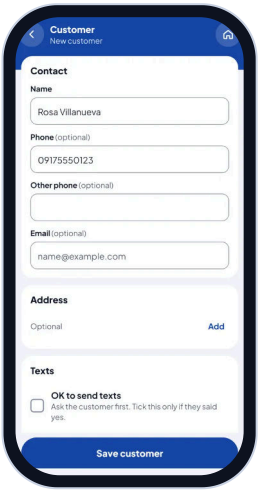


Your customers, from A to Z.

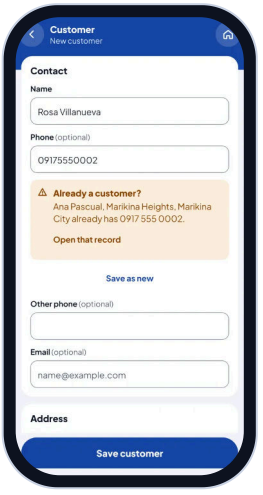
Add a customer

1. On the Customers tab, tap **Add customer**.
2. Type the **Name**. A name is enough; phone and address can come later.
3. Add the **Phone**, and an **Other phone** or **Email** if they have one.
4. Under **Address**, tap **Add** to add where you do the work. It is optional.
5. Under **Notes**, add anything useful, such as "prefers morning visits".
6. Tap **Save customer**.

If the name or phone is already used by another customer, the app says **Already a customer?** and offers **Open that record**. You can still save a new



1 A name is enough to start.



2 Already a customer? Open that record, or save anyway.

one, for example for two people with the same name.

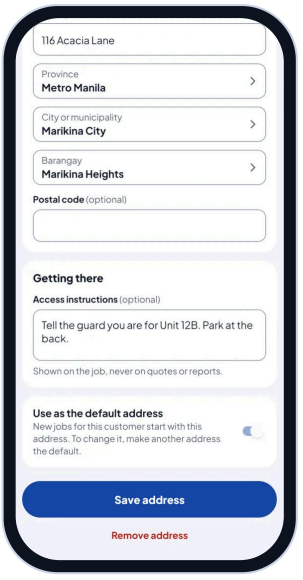
> **Tip:** You can also add a customer while making a job. On the New job screen, tap **Choose a customer**, then **Add a new customer**.

Under **Texts**, switch on **OK to send texts** only if the customer said yes. Ask them first. Without it, the app does not offer to send them texts.

Addresses

A customer can have more than one address, such as a home and a condo.

1. Open the customer and tap **Add an address** under Addresses.
2. Give it a **Nickname** if you like, such as Home or Condo.
3. Type the **Street, purok or landmark**, then pick the **Province**, **City or municipality** and **Barangay**. Metro Manila is listed as a province.
4. Under **Getting there**, add **Access instructions**, such as "gate code with the guard". They show on the job, never on quotes or reports.
5. Tap **Save address**.



An address with access instructions.

One address is the default: new jobs for this customer start with it.
To change it, open another address and switch on **Use as the default address**.
Tap **Directions** on an address to open it in your phone's maps app.

Units and places

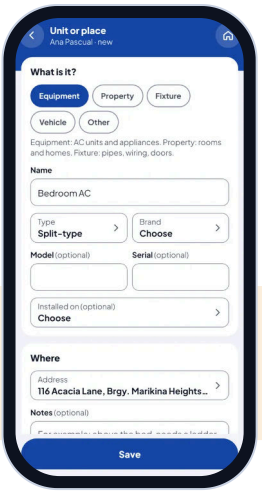
Units and places are what you service for a customer: an aircon, a refrigerator, a room, a car. Adding them lets you see each one's history, such as when Bedroom AC was last cleaned.

1. Open the customer and tap **Add a unit or place**.
2. Under **What is it?**, pick **Equipment**, **Property**, **Fixture**, **Vehicle** or **Other**.
3. Give it a **Name**, such as Bedroom AC or Family car.
4. Pick its **Type** and **Brand**, or **Make** for a vehicle. Type to add one that is missing.
5. Add what you know: model, serial, room or location, plate number, and notes such as "above the bed, needs a ladder".
6. Under **Where**, pick which of the customer's addresses it is at.

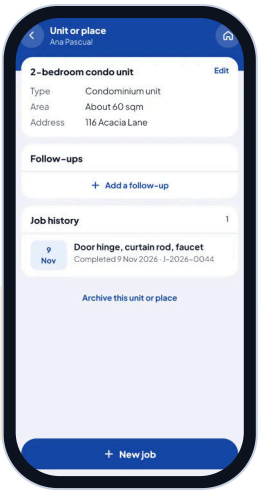
7 Tap **Save**.

Open a unit or place to see its **Job history**, finished jobs newest first, and its follow-ups. Tap **New job** there to book work on it, with the customer and the unit filled in.

Note: The plate number is for your records. It shows on reports only if you choose.



1 A unit: what it is, its type and brand.



2 A unit's job history.

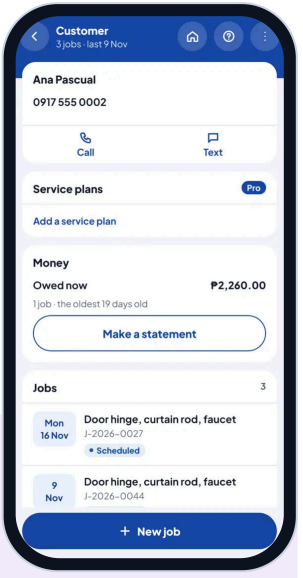
A customer's page

Open a customer to see everything about them:

- **Call** and **Text**, to reach them from your own phone.
- **Money**: what they owe now, and **Make a statement** to send them one PDF of it.
- **Jobs**: their open and past jobs.
- **Units and places**, and **Addresses**.

Tap **New job** at the bottom to add a job for this customer.

Pro: Service plans set up regular visits for a customer, such as aircon cleaning every 4 months. Each visit is a normal job. Tap **Add a service plan** on the customer.



A customer's page: contact, money, jobs, units and addresses.

Archive or delete a customer

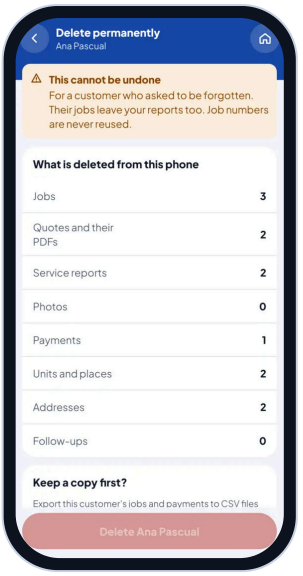
A customer you no longer work for can be archived. Archiving hides them from your lists, but their jobs, quotes and reports stay.

1 Open the customer and tap the menu at the top.
2 Tap **Archive**, then confirm.

An archived customer cannot get new jobs. To find one, tap **Show archived** on the Customers tab, open them and tap **Bring back**. A unit or place can be archived the same way, with **Archive this unit or place**.

Delete permanently is for a customer who asked to be forgotten. It removes the customer and everything about them from this phone: jobs, quotes, reports, photos, payments, units, follow-ups and addresses. Their jobs leave your reports too, and it cannot be undone.

1. Open the customer, tap the menu, then **Delete permanently**.
2. To keep a copy, tap **Export first** to save their jobs and payments as CSV files.
3. Type DELETE to confirm, and tap **Delete** with their name.



Delete permanently: what is removed.

Note: Backups you made earlier still hold that customer. They are your files; delete them yourself if needed.

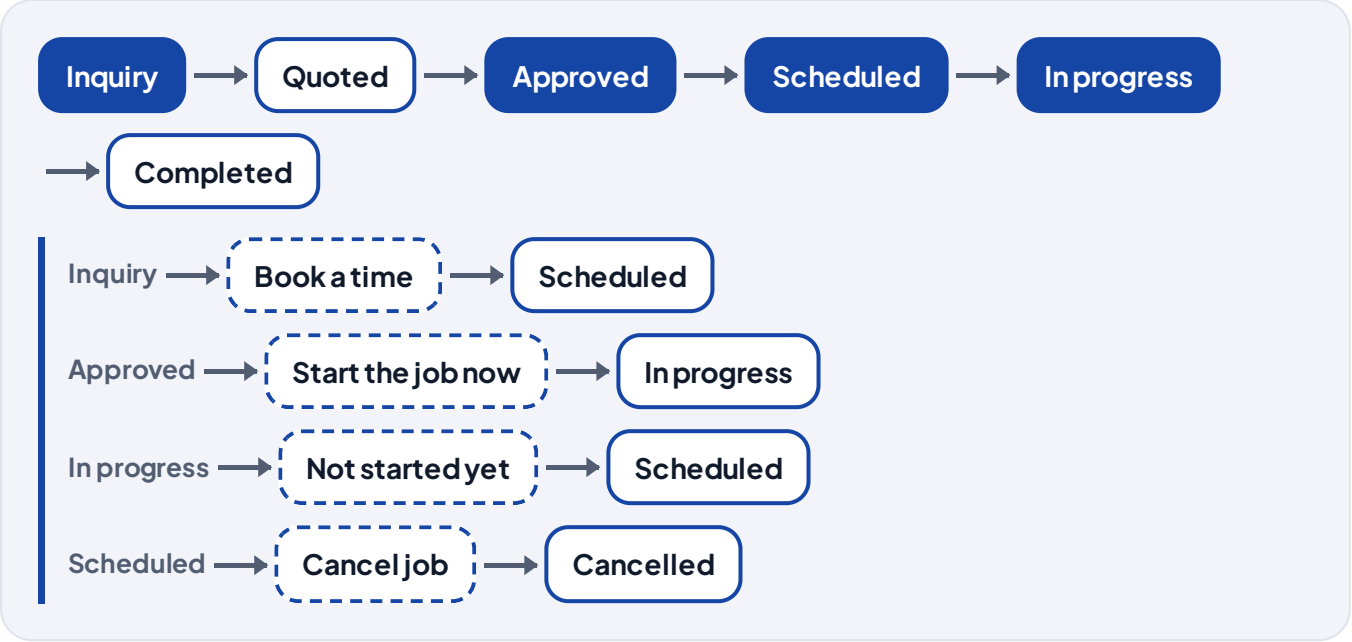
4. Jobs, scheduling and the calendar

Every piece of work is a job, from the first call to the finished report, and the calendar shows your booked days at a glance.

What a job is

A job is one piece of work for one customer, such as "AC cleaning, 2 split-type units". Each job gets a number, such as J-2026-0112. Its quote and service report use the same number, so one number follows the whole job.

A job moves through these steps, and its status shows at the top of the job:



- **Inquiry**: a new job, not priced or booked yet.
- **Quoted**: you issued a quote.
- **Approved**: the customer accepted the quote.
- **Scheduled**: it has a date and time.
- **In progress**: you started the work.
- **Completed**: you finished it and made the service report.
- **Cancelled**: it will not happen. It stays in your history.

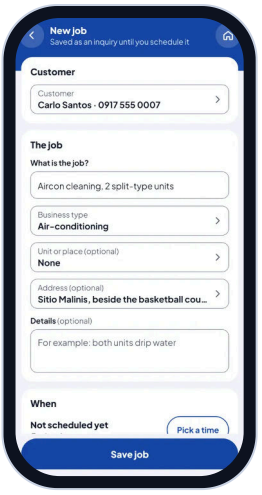
You do not have to use every step. A small job can go straight from Inquiry to Scheduled, with no quote.

Add a job

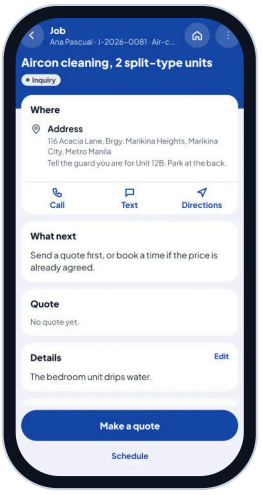
1. Tap **New job** on Home or on the Jobs tab.
2. Tap **Choose a customer** and pick one, or tap **Add a new customer**.

3. Under **What is the job?**, say what it is, such as "AC cleaning, 2 split-type units".
4. Pick the **Unit or place** and the **Address**, if the customer has them.
5. Add **Details** if you like, such as "both units drip water".
6. Under **When**, tap **Pick a time** to book it now, or leave it for later.
7. Tap **Save job**.

A job without a time is saved as an Inquiry, ready for a quote. A job with a time is Scheduled. If your shop has more than one business type, the form also asks which one the job is.
The job's screen then shows what to do next, such as **Make a quote** or **Schedule**.



1. A new job: customer, what it is, and when.

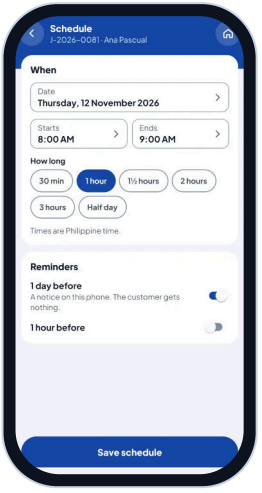


2. A new job shows what to do next.

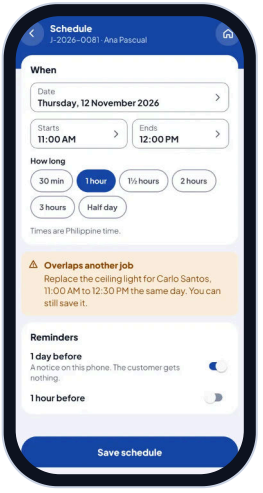
Book a time

1. Open the job and tap **Schedule**.
2. Pick the **Date** and when it **Starts**.
3. Tap a length under **How long**, such as **1 hour** or **Half day**, or pick when it **Ends**.
4. Under **Reminders**, choose **1 day before**, **1 hour before**, or both.
5. Tap **Save schedule**.

Reminders are a notice on this phone; the customer gets nothing from them. After you book, the app may offer a prepared text telling the customer the time, to send from your own phone.
While you pick a time, the app warns you, but never stops you:



1. Pick the day, the time and the reminders.



2. A warning, never a block.

- **Overlaps another job**: another open job is booked at the same time. Cancelled and finished jobs do not count.
- **Outside your working hours**: the time is outside the hours you set.
- A holiday or day off: it says what the day is, and whether you are open.

To move a booked job, open it and tap **Reschedule**.

Tip: Tap **Add to calendar** on a booked job to put it in your phone's own calendar too. **Open in my calendar** fills in the time, the customer's name and the address. If you move the job later, add the new time again.

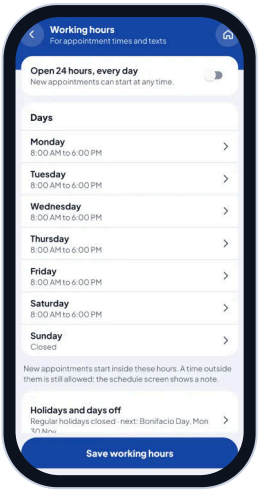
Note: On some phones, reminders come late or only when you open the app. If the job says **Reminders may come late on this phone**, tap **Allow reminders on time** and follow the steps.

Working hours, holidays and days off

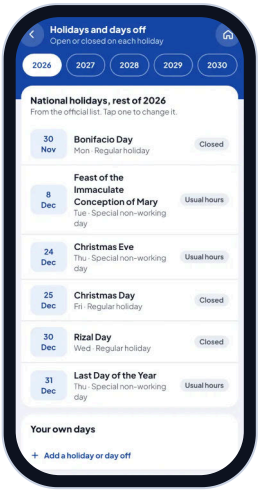
Your working hours set where new bookings start, and the note shown for a time outside them.

1. Open **More**, **Settings**, then **Working hours**.
2. Tap a day to set when you open and close, or switch it off for a day you are closed.
3. Tap **Use these hours for every open day** to copy one day's hours to the rest.
4. Tap **Save working hours**.

A shop open all day and night can switch on **Open 24 hours, every day**. A closing time after midnight is fine; it shows "(next day)".
National holidays are already in the app. To choose whether you are open on them, or to add your own days off:



1 Your working hours for each day.



2 National holidays and your own days off.

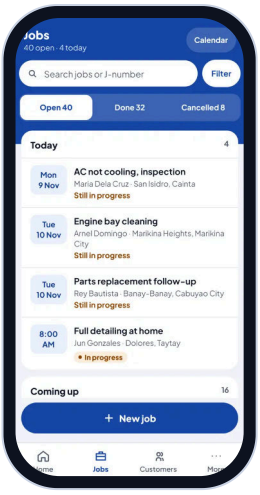
1. On Working hours, tap **Holidays and days off**.
2. Tap a holiday and choose **Closed**, **Open, usual hours** or **Open, special hours**.
3. To add your own, tap **Add a holiday or day off**. Pick **Local holiday**, **Declared non-working day** or **Day off**, give it a name and the days.
4. Switch on **Every year** for a day that comes back each year, such as your city's fiesta.

Holidays and days off show on the calendar and on the schedule screen. Nothing is ever blocked; jobs already booked stay as they are.

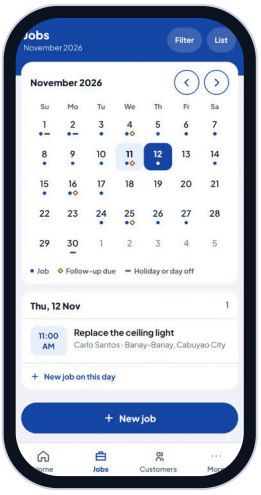
The Jobs list and the calendar

The **Jobs** tab lists every job, in three tabs: **Open**, **Done** and **Cancelled**. Open jobs are grouped:

- **Past their time**: still scheduled after their end time. Start them or reschedule them.
- **Today**.
- **Coming up**.
- **Not scheduled**: inquiries and approved jobs with no time yet.



1 Open jobs, grouped by when.



2 The month, with jobs, follow-ups and holidays marked.

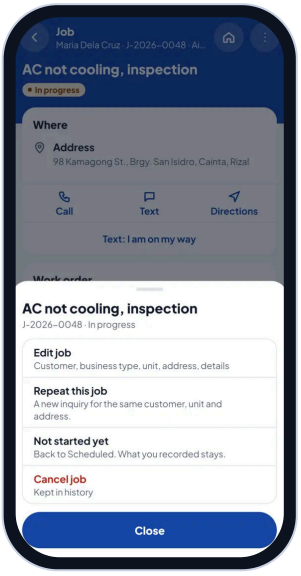
Search by customer, phone or J-number in **Search jobs or J-number**. Tap **Filter** to show only some jobs, such as only Approved ones.
Tap **Calendar** at the top to see the month. Small marks show days with a job, a follow-up due, or a holiday or day off. Tap a day to see what is on it, and **New job on this day** to book one there. Tap **List** to go back to the list.

Start a job, or take it back

- A **Scheduled** job: tap **Start job** when you begin. It moves to In progress.
- A job with no time yet: tap **Start the job now**. The app records it as approved and in progress, with the time now.
- An **In progress** job: tap **Open the work order** to record the work, and **Finish the job** when you are done. The next chapters explain both.

Tapped start by mistake, or the visit did not happen after all?

1. Open the job and tap the menu at the top.
2. Tap **Not started yet**.
3. Tap **Back to Scheduled**, or **Back to Approved** for a job with no time.



Not started yet takes the job back.

The work order and what you recorded on it stay, so starting again carries on.
To change the customer, unit, address or details, tap the menu, then **Edit job**.

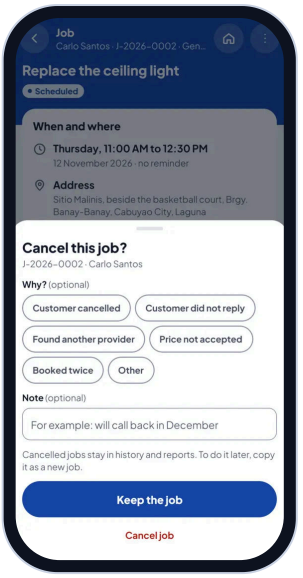
Repeat or cancel a job

To do the same work again, such as next year's cleaning:

1. Open the old job, tap the menu, then **Repeat this job**.
2. Check the new job. It has the same customer, unit and address, and is a new Inquiry.
3. If the old job had an accepted quote, **Start a quote with the same items** is on. It makes a new draft quote with those items, at your catalog prices now, not the old quote's. Switch it off if you do not want one.
4. Tap **Save job**.

To cancel a job that will not happen:

1. Open the job, tap the menu, then **Cancel job**.
2. Under **Why?**, pick a reason, such as **Customer cancelled** or **Price not accepted**.
3. Add a **Note** if you like, such as "will call back in December".
4. Tap **Cancel job**.



Pick why the job was cancelled.

A cancelled job stays in your history and reports, under the Cancelled tab. To do it later after all, open it and tap **Repeat this job**.

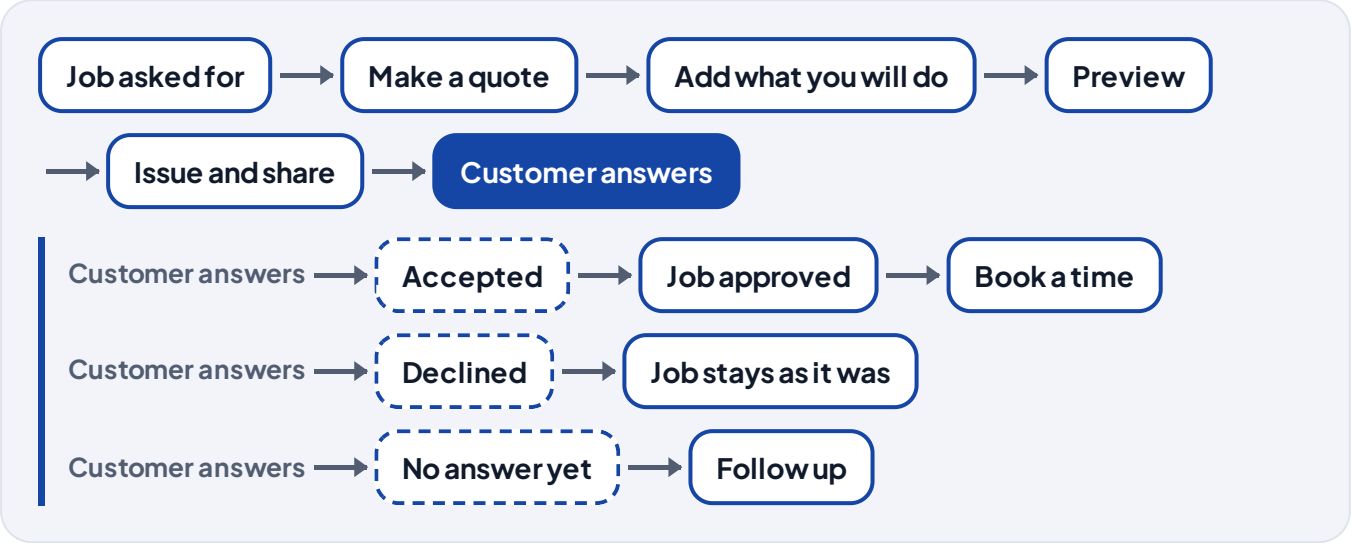
Pro: In a shop with a team, each job is given to the people who do it, and an overlap warning is only for the same person.

5. Quotes

Price the work before you do it, send a clear PDF quote, and keep track of the customer's answer.

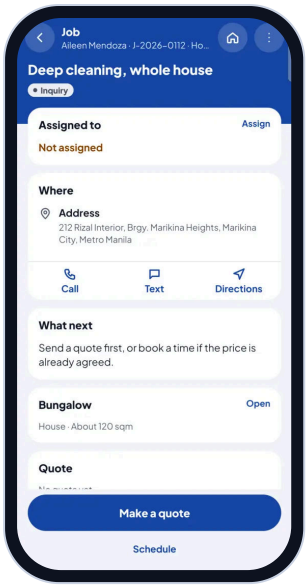
What a quote is

A quote tells your customer what you will do and what it costs, before you start. It is an estimate, not an invoice or an official receipt, and it says so at the top of every page. Each quote has the same number as its job: job J-2026-0112 gets quote Q-2026-0112. Once you issue a quote it is fixed, so you can always show exactly what you sent.

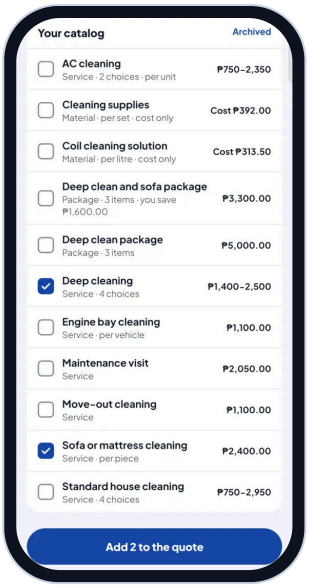


Make a quote

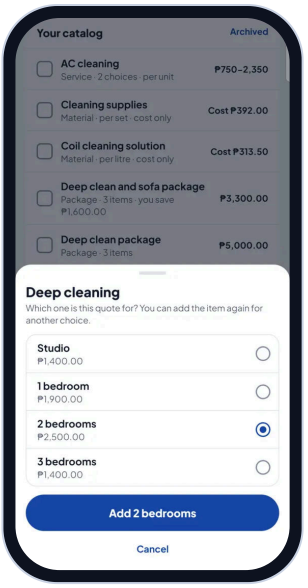
1. Open the job and tap **Make a quote**.
2. Tap **From catalog** and tick everything you will do or supply. Search helps when your catalog is long.
3. Tap **Add**. When a service has choices, such as the size of the home, pick the one that fits.
4. Check the lines and the total. Tap a line to change its quantity or price for this quote only.



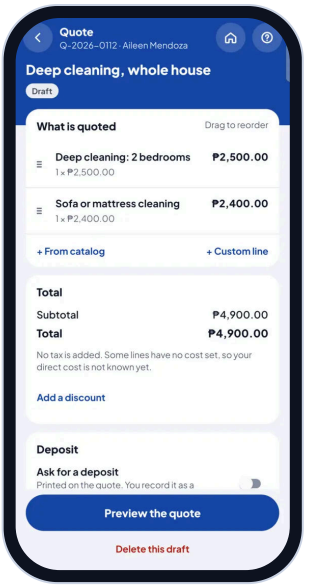
1 The job: tap Make a quote.



2 Tick what you will do or supply.



3 Pick the choice that fits.



4 The draft quote, with its total.

Tip: Something not in your catalog? Tap **Custom line** and type it in. It stays on this quote only.

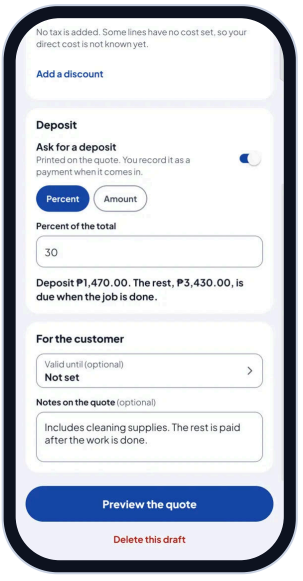
Materials marked cost only, such as cleaning supplies, never show on the quote. They count in your own costs so you can see your margin.

Ask for a deposit

Under the total, switch on **Ask for a deposit** and pick **Percent** or **Amount**. The quote then shows the deposit and the rest, boxed under the totals.

A deposit is a request printed on the quote. When the money comes in, record it as a payment on the job, like any payment.

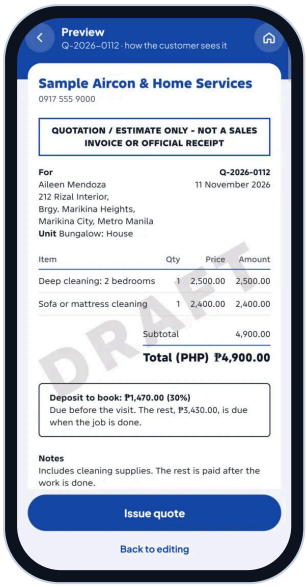
Under **For the customer** you can also set a date the quote is valid until, and add a note, such as what the price includes.



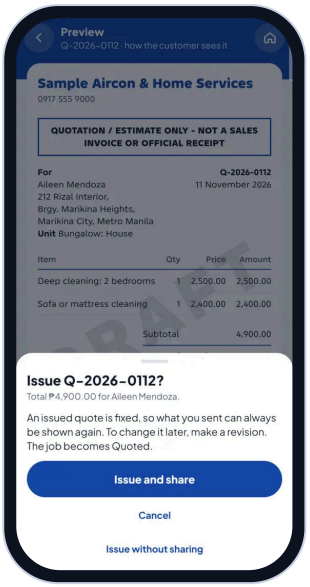
A 30% deposit, and a note for the customer.

Preview and issue

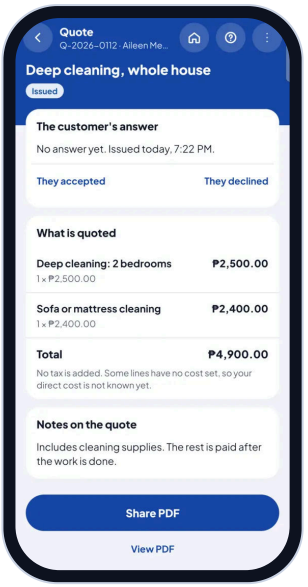
1. Tap **Preview the quote** to see the PDF exactly as your customer will. DRAFT shows only on the preview.
2. Tap **Issue quote**, then **Issue and share**, and pick how to send it: text, chat or email.
3. Choose **Issue without sharing** when you will send it later; **Share PDF** stays on the quote.



1 The preview, as the customer sees it.



2 Issue and share, or issue without sharing.



3 Issued: waiting for the customer's answer.

Issuing a quote moves its job to **Quoted**.

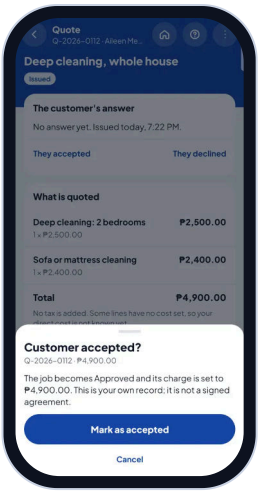
> **Note:** In a team shop, issuing needs a moment online, because quote numbers come from the server so no two phones use the same one. Your draft is saved until then.

Record the customer's answer

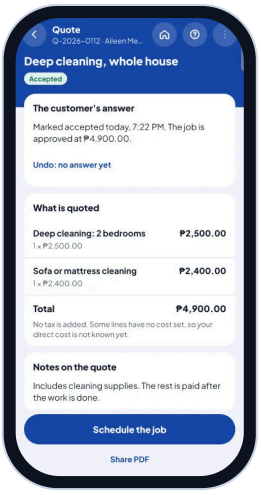
When the customer says yes or no, open the quote and tap **They accepted** or **They declined**.

- **Accepted**: the job becomes **Approved** and its charge is set to the quote's total. Tap **Schedule the job** to book the visit.
- **Declined**: the job stays as it was, so you can revise the quote or cancel the job.
- Tapped the wrong answer? Tap **Undo: no answer yet**.

This is your own record of what the customer said; it is not a signed agreement.



1 Accepted: the job is approved at the quote's total.



2 Then book a time with Schedule the job.

Change a quote after issuing

An issued quote never changes. To change the price or the lines, **revise** it: the app makes a new version, such as Q-2026-0112-R2, from the latest one. The older version stays in history, and its PDF says it was replaced.

To withdraw a quote that was a mistake, **void** it: it stays in history and its PDF shows VOID.

Follow up a quote nobody answered

Quotes waiting for an answer show on Home under the quotes chip. Open one and use its prepared follow-up text, or call the customer. A quote past its valid-until date shows **Expired**, but the customer can still accept it.

Pro: With texts sent for you, ServicePocket sends the follow-up by itself at the time you choose.

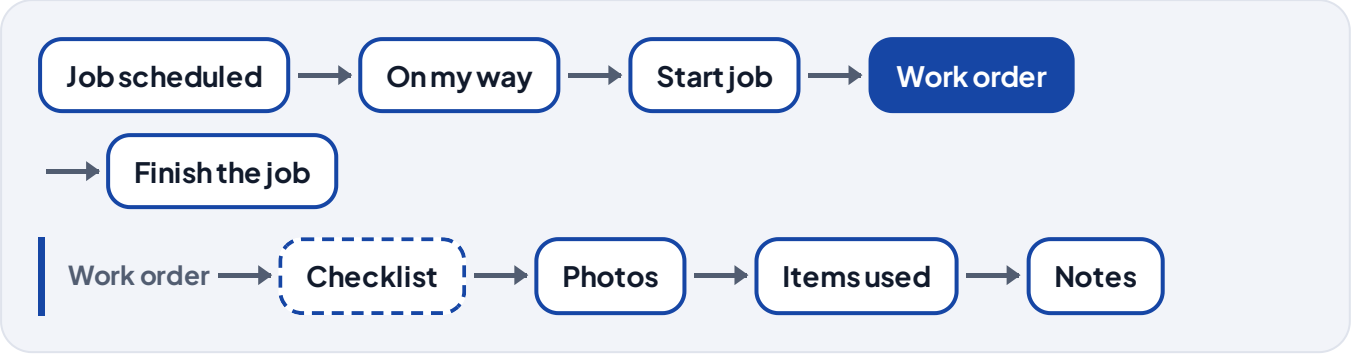
6. On the job: the work order

Tell the customer you are coming, then keep the checklist, photos, items used and your time in one place while you work.

What the work order is

The work order is where you record the work while you do it. It opens when you start the job, and it holds the checklist, the photos, the items you used and your notes for the report.

Everything you record here goes into the service report when you finish. Your costs and your time stay with you; they never print on anything the customer sees.

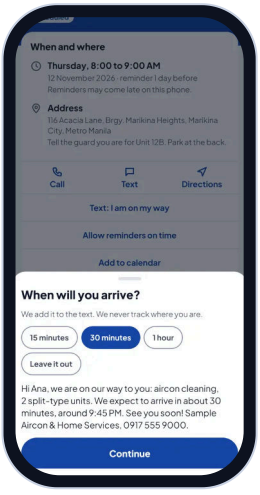


Tell the customer you are on your way

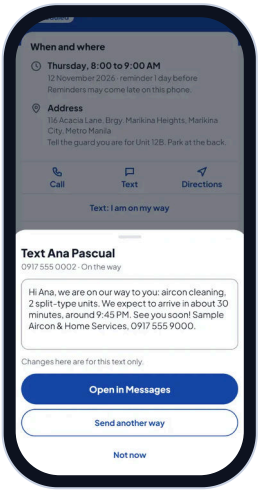
When you leave for a job, you can text the customer about when you will arrive.

1. Open the job. It must be scheduled or in progress, and the customer needs a phone number.
2. Under **When and where**, tap **Text: I am on my way**.
3. Pick **15 minutes**, **30 minutes** or **1 hour**, or **Leave it out**. Then tap **Continue**.
4. Check the words and tap **Open in Messages**, or **Send another way** to use a chat app.

The text says about when you expect to arrive, such as "in about 30 minutes, around 10:30 AM". The app never tracks where you are. Sending this text does not start the job.



1 When will you arrive? Pick about how long you will take.



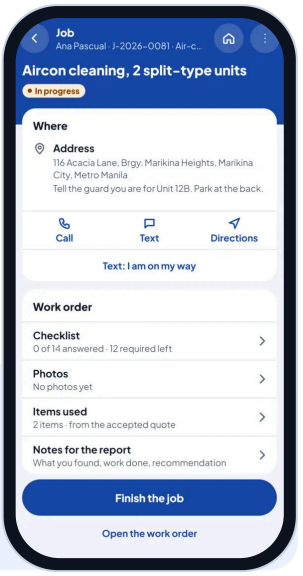
2 The text with your arrival time, ready to send.

Tip: With texts sent for you, the on-the-way text goes out by itself when you tap it, with nothing more to do. See the chapter on follow-ups and texts.

Start the job

1. Open the job.
2. Tap **Start job**. A job with no time booked shows **Start the job now** instead; tap it, then **Start now**.
3. The job moves to **In progress**, and a **Work order** card shows on the job with the checklist, photos, items used and notes.
4. Tap **Open the work order** to fill it in.

Tip: Started by mistake? Tap the menu at the top right of the job, then **Not started yet**. The job goes back to how it was, and what you recorded stays.

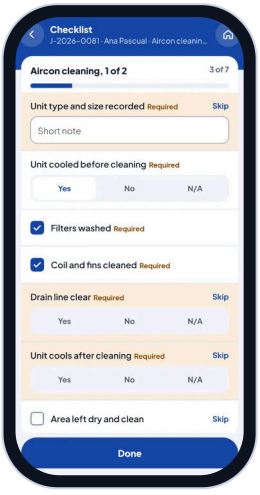


Started: the Work order card on the job.

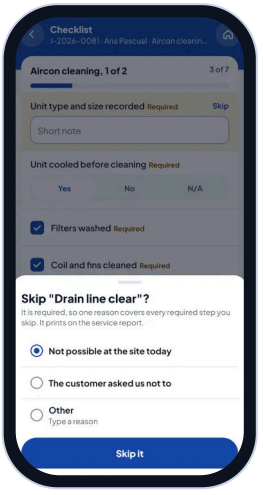
Answer the checklist and skip with a reason

Each service on the job brings its own checklist, such as the steps of an aircon cleaning.

1. On the work order, tap **Open the checklist**.
2. Answer each step. Depending on the step, tap **Done**, pick **Yes**, **No** or **N/A**, or type a number or a short note.
3. Need a step that is not on the list? Tap **Add a step for this job**. Switch on **Also add it to** the service if you want it there next time.



1 The checklist, with required steps left.



2 Skip a required step, with one reason.

Steps marked **Required** are the ones that matter most. The work order shows how many are left, such as "2 required left". The app never blocks you: a missing step is only flagged.

Sometimes a step cannot be done, such as when the customer asks you not to. To skip it:

1. Beside the step, tap **Skip**. A step that is not required is skipped at once.

2. For a required step, pick a reason: **Not possible at the site today**, **The customer asked us not to**, or **Other** and type it.
3. Tap **Skip it**.

One reason covers every required step you skip on the job, and it prints on the service report. Changed your mind? Tap **Answer it** to bring the step back.

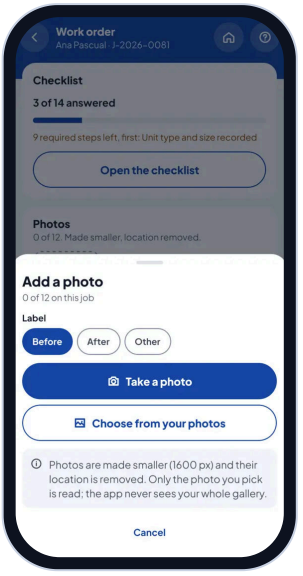
Note: If you tap **Finish the job** with required steps still unanswered, the app asks why they were skipped. Type the reason and tap **Finish anyway**, or tap **Back to the checklist**. Nothing is ticked for you.

Add photos

Photos show the customer what you found and what you did. Each job can have up to 12.

1. On the work order, under **Photos**, tap **Add a photo**.
2. Pick the label: **Before**, **After** or **Other**.
3. Tap **Take a photo**, or **Choose from your photos**.

Photos are made smaller and their location is removed. The app only reads the photo you pick; it never sees your whole gallery. To take a photo off the job, tap it, then **Remove photo**.



Add a photo, labelled Before, After or Other.

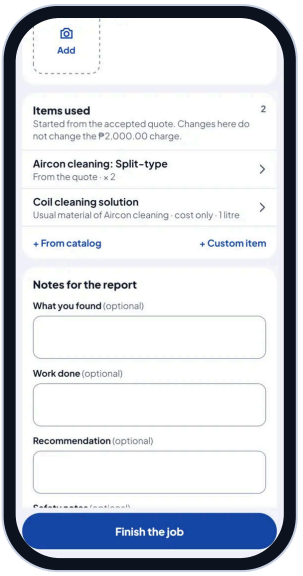
Record the items you used

When the job came from an accepted quote, **Items used** already lists the quote's lines. Change them to match what you really used.

1. Tap **+ From catalog**, tick what you used, then tap **Add** at the bottom. Or tap **+ Custom item** for something not in your catalog.
2. Tap a line to change the quantity used.
3. Switch off **Charge the customer** for a material that is cost only, such as cleaning chemicals. It counts in your costs and never shows on the report.
4. Tap **Remove: not used** for anything you did not use.

Changing the items used never changes what you charge on its own. To change the charge, use **Change the charge** on the job's money.

If you track stock for an item, the app takes it from your stock when you finish the job. When the app shows fewer on hand than you used, it still saves and asks you to count that item later.

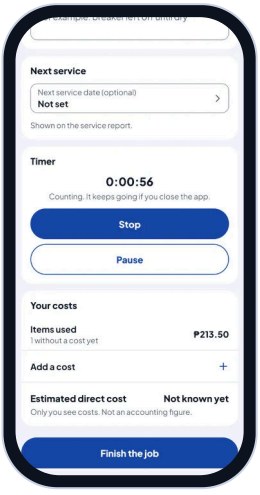


Items used, started from the accepted quote.

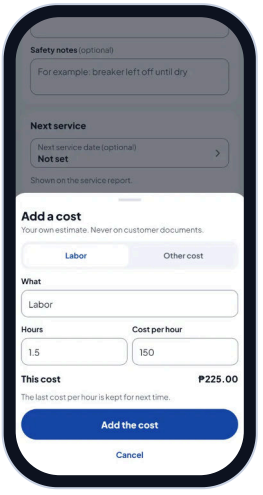
Time the job and record your labor

The timer counts how long the job takes, so you know your labor cost.

1. On the work order, under **Timer**, tap **Start the timer** when you begin.
2. Tap **Pause** for a break, then **Carry on**.
3. Tap **Stop** when you are done. The hours fill a **Labor** cost.
4. Check the **Hours** and the **Cost per hour**, then tap **Add the cost**.



1 The timer, counting.



2 Stopping the timer fills the labor hours.

The timer keeps counting if you close the app. Only one job can have a timer running at a time. The app remembers your last cost per hour for next time.

You can also add a cost by hand under **Your costs**: tap **Add a cost**, then **Labor** or **Other cost**, such as a tricycle fare. Only you see costs; they never print on customer documents.

Before you finish: notes and the signature

Under **Notes for the report**, type **What you found**, the **Work done**, a **Recommendation** and any **Safety notes**. They save as you type and print on the service report.

Under **Next service**, you can set the date the customer should have the next visit. Finishing the job turns it into a follow-up, as the next chapter shows.

When you finish a job, the customer can sign on your phone to say the work on the report was done.

1. Tap **Finish the job**.
2. Tap **Customer's signature**.
3. Hand the phone to the customer to sign under **Sign here**, and type the **Name of the person signing**.
4. Tap **Save the signature**, then finish the job.

The customer can always **Skip** it, and you can finish without it. The signature can only be added before the job is finished, never afterwards. It is not a payment or a receipt.



The customer signs on your phone (Pro).

Pro: The customer's signature is part of Pro. Turn it on or off in More, then Settings, then **Quotes and reports**, with **Ask for a signature**.

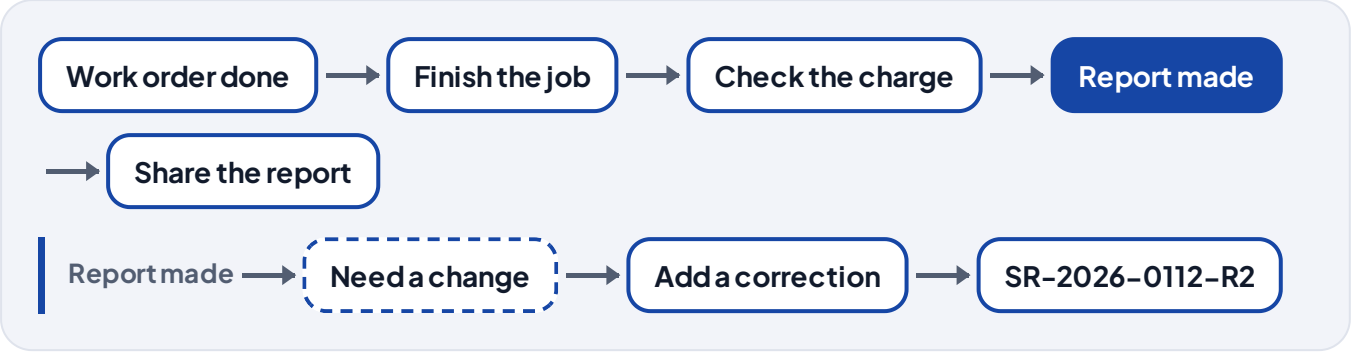
7. Finishing and service reports

Finish the job, settle what you charge, and send the customer a clear service report of the work done.

What finishing does

Finishing a job closes the work and makes its service report. The report has the same number as the job: job J-2026-0112 gets report SR-2026-0112.

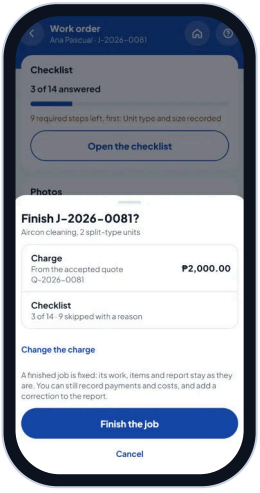
A finished job is fixed: its work, items and report stay as they are. You can still record payments and costs, and add a correction to the report.



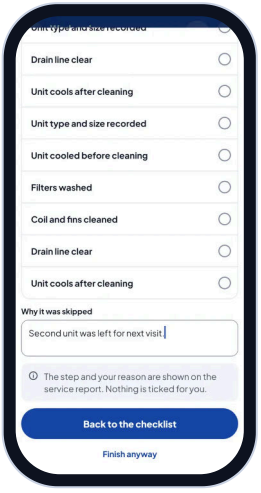
Finish a job

1. Open the job and tap **Finish the job**.
2. If required checklist steps are not answered, type **Why it was skipped** and tap **Finish anyway**, or go **Back to the checklist**.
3. Check the summary: the charge, the stock that will be taken, the checklist and the next service date.
4. Tap **Finish the job**.

The job moves to **Completed**, and a **Service report** card shows on it. Any stock you track is taken from what you have on hand.



1 Finish the job: check the summary first.

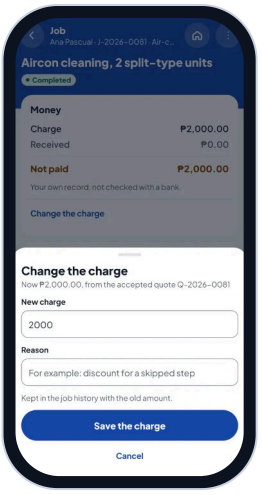


2 Required steps not answered: say why.

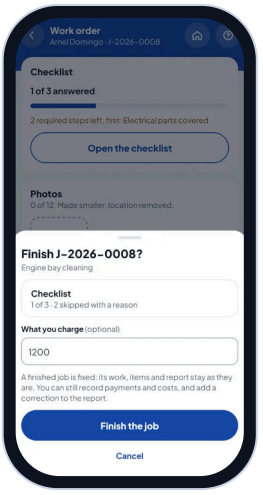
The charge: what you bill for the job

The charge is the amount the customer owes for the job.

- **With an accepted quote**, the charge is the quote's total. The finish sheet says **From the accepted quote**.
- **Without an accepted quote**, the finish sheet asks **What you charge**. Type the amount, such as ₱1,500.00.
- **Not sure yet?** Leave the box empty to **Set later**. Set it on the job when you know, with **Set the charge**.



1 Change the charge, with a reason.



2 No accepted quote: type what you charge, or leave it to set later.

To change a charge that is already set:

1. On the job, under **Money**, tap **Change the charge**.
2. Type the **New charge** and a **Reason**, such as a discount for a skipped step.
3. Tap **Save the charge**.

The old amount and your reason stay in the job's history.

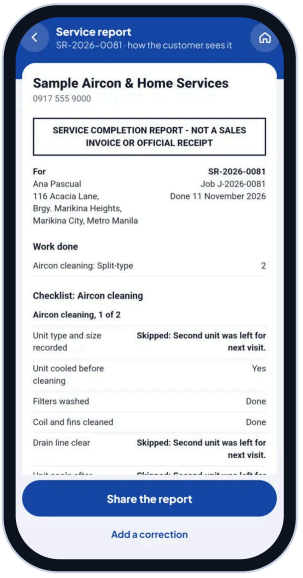
Note: Changing the items used on the work order never changes the charge on its own. Only **Change the charge** does.

The service report

The service report is a PDF that records the work done. It shows your shop, the customer, the unit or place, what you found, the work done, your recommendation, the checklist, the photos and the next service date.

It never shows prices; the quote has them. Every page says it is a service completion report, not a sales invoice or official receipt.

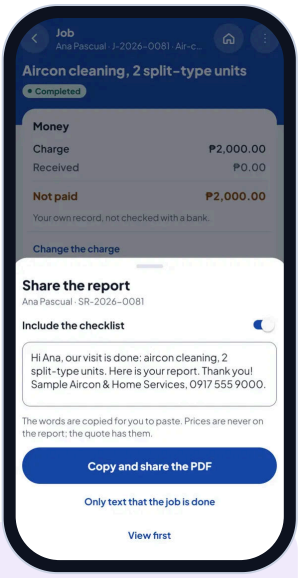
To see it, open the finished job and tap the report under **Service report**.



The service report, as the customer sees it.

Share the report

1. Open the finished job and tap **Share the report**.
2. Choose what goes in: switch **Include photos** and **Include the checklist** on or off.
3. Check the words that go with it. They are copied for you to paste.
4. Tap **Copy and share the PDF**, pick a chat app or email, and paste the words.



Choose what goes in, then share.

To send only a text that the job is done, without the PDF, tap **Only text that the job is done**.

Pro: The shop's terms and warranty note, a document colour and the customer's signature print on reports in Pro. Set them in More, then Settings, then **Quotes and reports**.

Note: In a team shop, sharing needs a moment online the first time, so the report gets its number from the server.

The next service date

Set a **Next service date** on the work order before you finish, such as six months from today for an aircon cleaning.

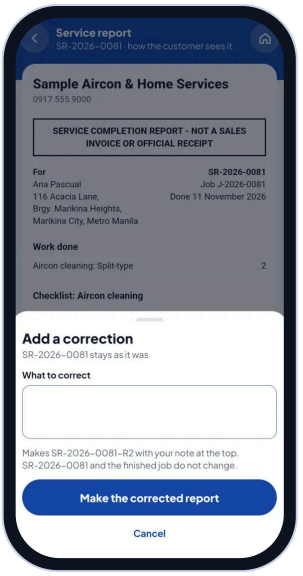
When you finish, the app adds it as a follow-up for the unit, or for the customer when there is no unit. It also prints on the service report, so the customer knows when to call you back. You can change or remove it later from Home or the unit.

Correct a finished report

A finished report never changes. To fix a mistake, add a correction: the app makes a new version, such as SR-2026-0112-R2, with your note at the top.

1. Open the finished job and tap the report under **Service report**.
2. Tap **Add a correction**.
3. Type **What to correct**, such as "Unit is 1.5 HP, not 1.0 HP".
4. Tap **Make the corrected report**.

The first report and the finished job stay as they were. **View the original** shows the first version. A corrected report is not signed again; it says who signed the original.



Add a correction: a new version with your note on top.

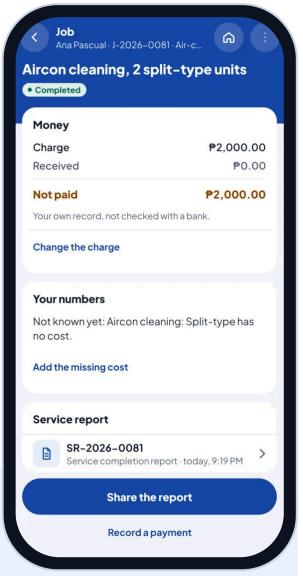
Your numbers: cost and margin

On a finished job, **Your numbers** shows how the job went for you.

- **Estimated direct cost**: the cost of the items used, your labor and other costs you added.
- **Estimated direct margin**: the charge minus those known costs.

If an item has no cost, the margin says **Not known yet**. Tap **Add the missing cost** to fill it in. Only you see these numbers. They are not profit or tax income.

Tip: Costs more than the charge? The card warns you, so you can check the costs and the charge.



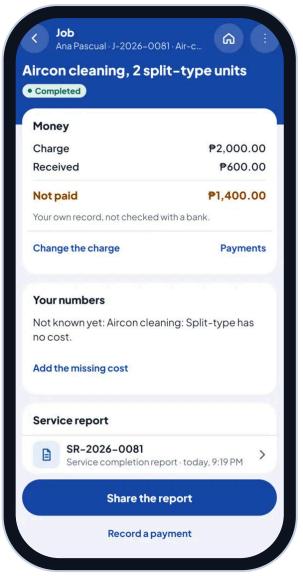
Your numbers: estimated direct cost and margin.

8. Money: payments, receipts and statements

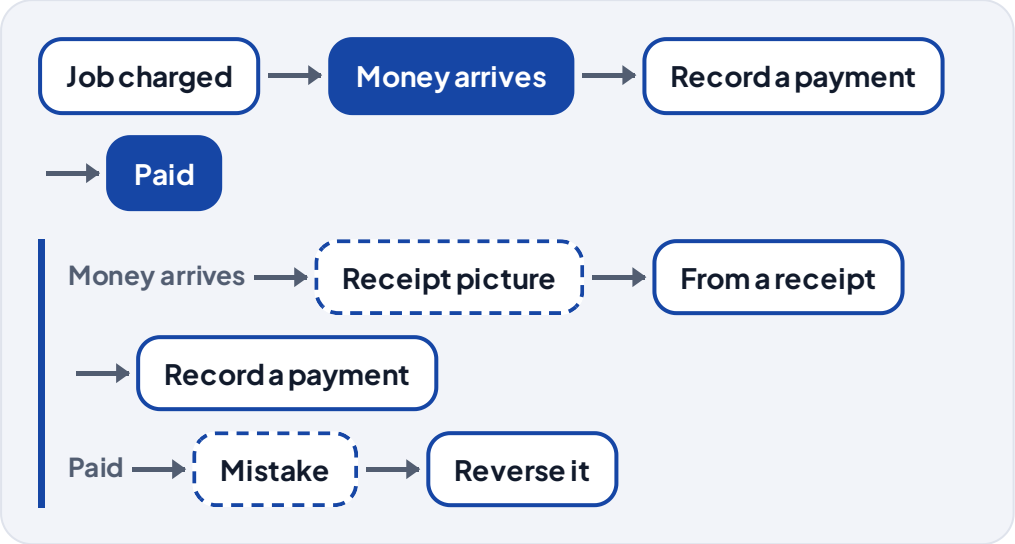
Record the money you receive, see who still owes you, and show customers how to pay.

How money works in ServicePocket

Each job has a charge, the amount the customer owes, and the payments you record against it. The job shows what was **Received** and what is **Not paid**, with a label such as **Partly paid** or **Paid**. Payments are your own record of money received. ServicePocket does not check them with GCash, Maya or a bank, and never stores account details.



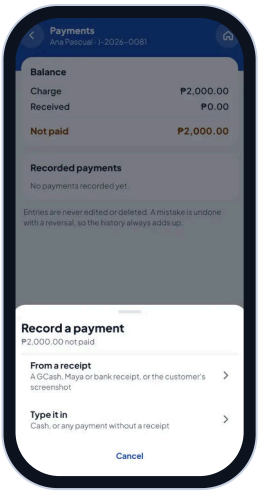
The job's money: received and not paid.



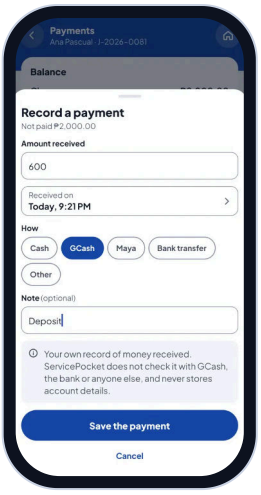
Record a payment

1. Open the job and tap **Record a payment**.
2. Tap **Type it in**.
3. Type the **Amount received**, such as ₱1,500.00, and check **Received on**.
4. Under **How**, pick **Cash**, **GCash**, **Maya**, **Bank transfer** or **Other**, and type how it was paid.
5. Add a **Note** if you like, such as a reference number, and tap **Save the payment**.

The app remembers the last way you were paid, for next time. You can record a payment before the job is finished, such as a deposit or a part payment.



1 Record a payment: from a receipt, or type it in.



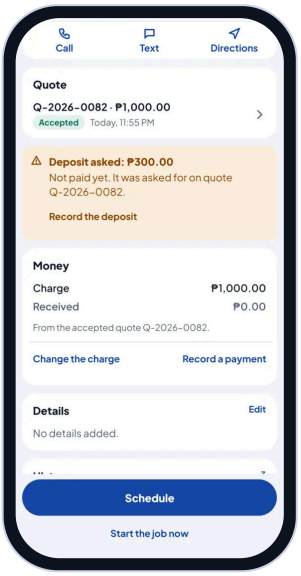
2 Type the amount and how it was paid.

Deposits

When a quote asked for a deposit, the job shows **Deposit asked** with the amount, until it is paid.

1. Open the job and tap **Record the deposit**.
2. The amount starts at what is left of the deposit. Check it and save it like any payment.

A deposit is an ordinary payment, so it counts toward what the customer owes for the job.



A deposit asked on the quote, not paid yet.

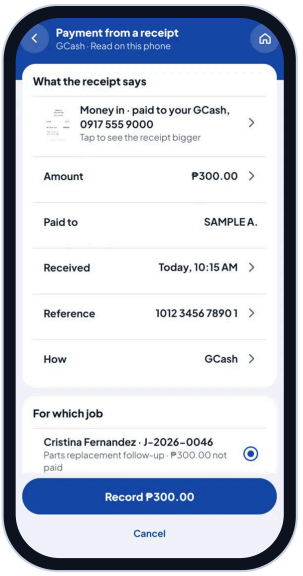
Record a payment from a receipt

When a customer pays by GCash, Maya or a bank, you can record it from the receipt picture instead of typing. It works with your own screenshot or with the one the customer sent you in a chat. The phone reads the receipt itself, with no signal needed.

1. In the Gallery or a chat, open the receipt, tap **Share**, then ServicePocket. Or open the job, tap **Record a payment**, then **From a receipt**, and pick the picture.

2. Check **What the receipt says**: the amount, when it was received, the reference and how it was paid. Type anything that could not be read.
3. Check **For which job**. The app suggests the most likely job; tap **Choose another job** if it is a different one.
4. Check that the money really arrived in your GCash, Maya or bank account.
5. Tap **Record**, with the amount, such as **Record ₱1,850.00**.

The receipt picture is kept with the payment, on this phone and in your protected backup. It never prints on quotes, reports or statements, and it does not count toward the 12 photos of a job. Tap the payment later to see the receipt, share it, or remove the picture.



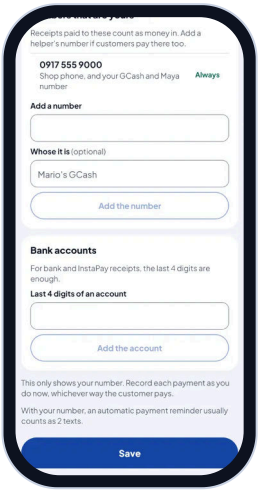
A made-up GCash receipt, read on the phone: check it and record.

Note: A picture of a receipt can be changed. Always check your own GCash, Maya or bank before you record it.

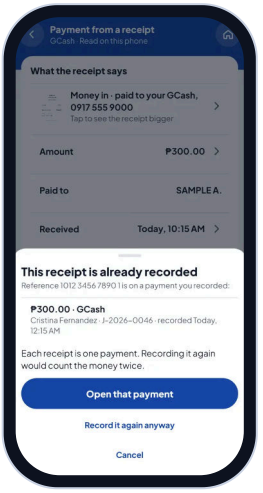
What the receipt reader catches

The same receipt twice. If the reference number is already on a payment, the app says **This receipt is already recorded** and shows that payment. Tap **Open that payment** to see it. Recording it again would count the money twice.

Money paid to another number. The app knows money is yours by your own numbers, not by the receipt's wording. If a receipt shows money paid to a number that is not yours, it asks **Is this money for your shop?** Tap **Yes, it was paid to the shop** for a helper's GCash, for example, or **No, this is not a payment to me**.



1 Numbers and bank accounts that are yours.



2 The same receipt twice is caught.

Purchases and money you sent. Card purchases and bills paid are never recorded as payments. The app says **This is a purchase, not a payment to you**, or **This is money you sent**.

No receipt found. When the app cannot find an amount or a reference number, tap **Choose another picture** or **Type the payment in**.

To tell the app which numbers and accounts are yours:

1. Open More, then Settings, then **How customers pay you**.
2. Under **Numbers that are yours**, your shop phone and your GCash and Maya number are always there. Tap **Add a number** for another one, such as a helper's GCash, and say **Whose it is**.
3. Under **Bank accounts**, type the **Last 4 digits of an account** and tap **Add the account**.

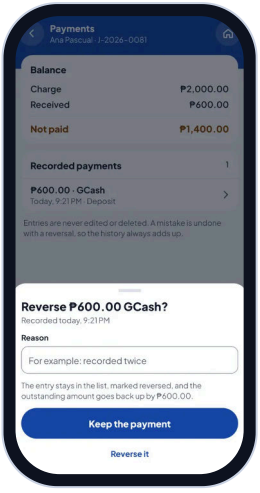
Fix a payment, and see who owes you

Payments are never edited or deleted, so the history always adds up. A mistake is undone with a reversal.

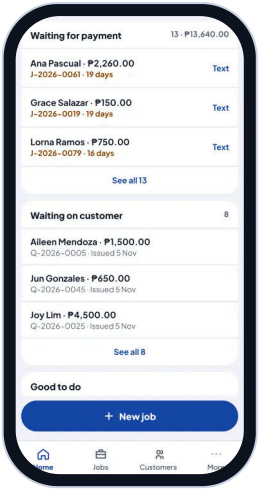
1. On the job, under **Money**, tap **Payments**.
2. Tap the payment that is wrong.
3. Type a **Reason**, such as "recorded twice", and tap **Reverse it**.

The payment stays in the list, marked **Reversed**, and the amount not paid goes back up.

Finished jobs with money still owed show on Home under **Waiting for payment**, oldest first. Tap **Text** on a row to send the customer a prepared payment reminder from your own phone. Tap **See all** for the whole list, with a search by name or job number.



1 Reverse a payment, with a reason.



2 Waiting for payment on Home, oldest first.

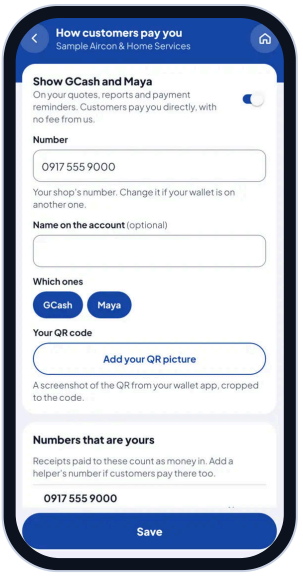
Show your GCash or Maya number and QR

Your GCash or Maya number can print on your quotes, reports and payment reminders, so customers know how to pay you. They pay you directly, with no fee from us.

1. Open More, then Settings, then **How customers pay you**.
2. Switch on **Show GCash and Maya**.
3. Check the **Number** and the **Name on the account**, and pick **Which ones** you use.
4. Tap **Add your QR picture** and pick a screenshot of the QR from your wallet app, cropped to the code.

This only shows your number. You still record each payment yourself.

Tip: Check that the QR scans before you share a quote with it.

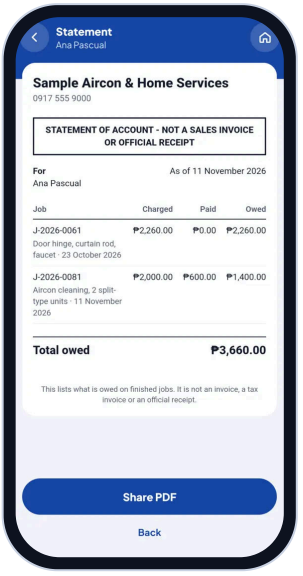


Your GCash and Maya number and QR, shown on documents.

Statements and asking for a review

A statement lists what a customer still owes on finished jobs, in one PDF. It is handy for a customer with several jobs, such as a landlord with many units in Quezon City.

1. Open the customer. The **Money** card shows what is **Owed now**.
2. Tap **Make a statement**.
3. Tick the jobs to list. Switch on **Include paid jobs from the last 3 months** for a fuller history.
4. Tap **Preview the statement**, then **Share PDF**.



A statement of what the customer owes.

The statement says it is not a sales invoice or official receipt. After a good job, you can ask the customer for a review.

1. Open More, then Settings, then **Shop details**. Under **Reviews**, paste the **Link to your review page**. Any site works.
2. Open the finished job and find **Texts for this job**.
3. Beside **Ask for a review**, tap **Text**, check the words and send it.

9. Follow-ups, service plans and texts

Remember when each customer is due again, keep regular customers on a plan, and text them at the right moments.

Reminders for your jobs

ServicePocket can remind you of a booked job with a notice on your phone. The customer gets nothing; these are for you.

1. When you book a job, look under **Reminders** on the schedule screen.
2. Switch **1 day before** and **1 hour before** on or off for this job.

New jobs start with the reminders you set in More, then Settings, under **New jobs**.

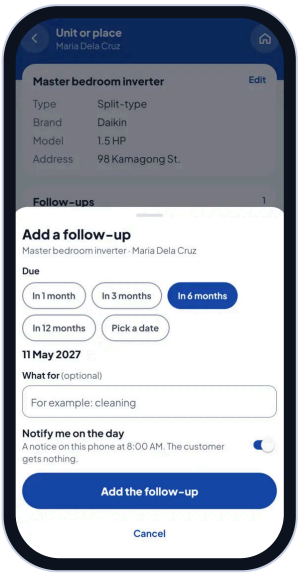
> **Note:** On some phones, a reminder can come late, or only when you open the app, because the phone puts apps to sleep to save battery. See "Reminders on time" at the end of this chapter.

Follow-ups: when a customer is due again

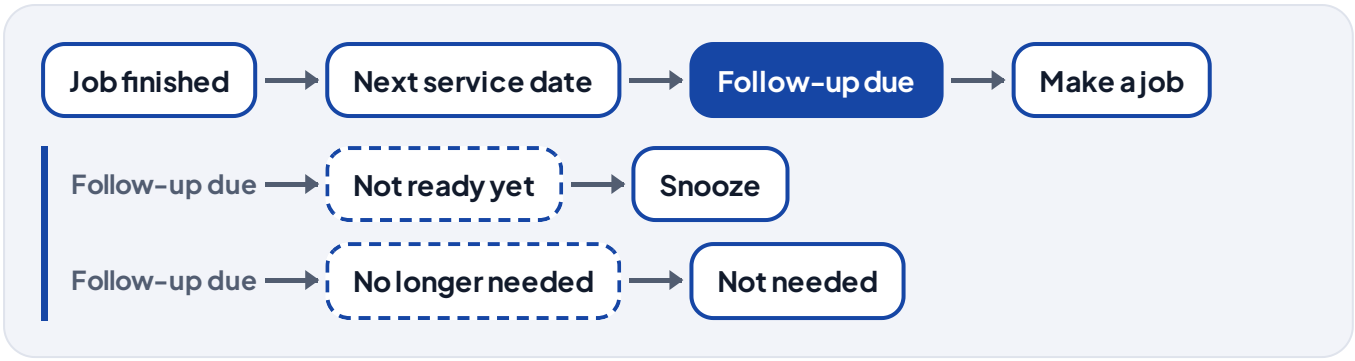
A follow-up is a date when a customer or a unit is due for service again, such as an aircon cleaning every six months. It brings back repeat work without you having to remember.
There are two ways to add one:

- Set a **Next service date** on the work order before you finish a job. Finishing adds it as a follow-up.
- Open a unit and tap **Add a follow-up**. Pick when it is **Due**, type **What for**, such as "cleaning", and tap **Add the follow-up**.

Switch on **Notify me on the day** to get a notice on your phone when it is due.



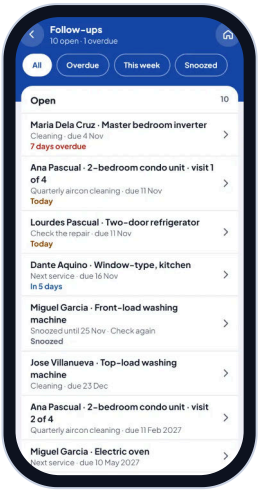
Add a follow-up on a unit.



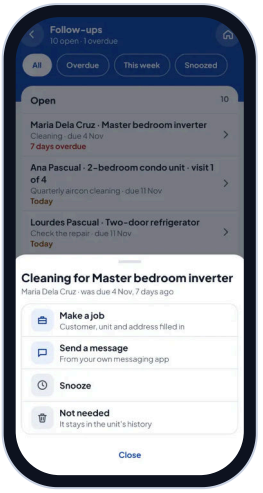
The Follow-ups list

Follow-ups due soon show on Home, overdue ones first. The whole list is in More, then **Follow-ups**, with filters for **Overdue**, **This week** and **Snoozed**.
Tap a follow-up to choose what to do:

- **Make a job**: a new job with the customer, unit and address filled in.
- **Send a message**: a prepared text, sent from your own phone.
- **Snooze**: hide it for **1 week**, **2 weeks**, **1 month**, or until a date you pick.
- **Not needed**: close it. It stays in the unit's history.



1 The Follow-ups list, overdue first.



2 What to do with a follow-up.

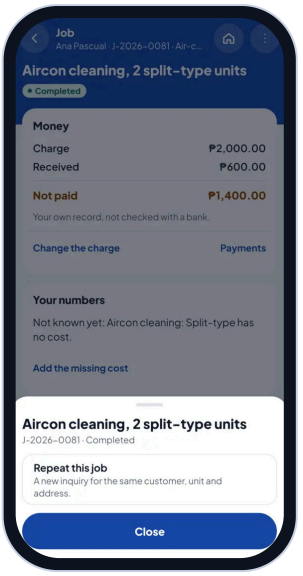
Tip: To choose how many days ahead Home shows follow-ups, open More, then Settings, then **Follow-ups**.

Repeat a job

For work you do again and again, copy an old job instead of starting from nothing.

1. Open the old job. Tap the menu at the top right, then **Repeat this job**. A cancelled job also has a **Repeat this job** button at the bottom.
2. The New job form opens with the same customer, unit and address.
3. If the old job had an accepted quote, switch on **Start a quote with the same items** to get a draft quote at today's catalog prices.
4. Check the form and save the job.

The new job is a fresh inquiry. Nothing about the old job's quote, payments or report carries over.

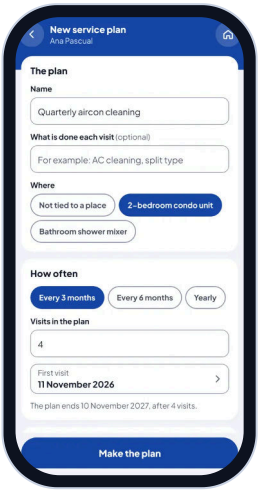


Repeat a job, with a quote at today's prices.

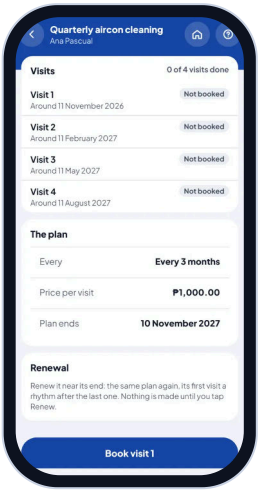
Service plans

A service plan sets up a customer's regular visits ahead, such as quarterly aircon cleaning for a small office in Makati. You see how many visits are done, book the next one in one tap, and get a nudge before the plan ends.

1. Open the customer and tap **Add a service plan**.
2. Type the **Name**, such as "Quarterly aircon cleaning", and **What is done each visit**.
3. Pick **Where**, and **How often**: **Every 3 months**, **Every 6 months** or **Yearly**.
4. Set the **Visits in the plan**, the **First visit**, and a **Price per visit** if you like.
5. Tap **Make the plan**.



1 A new service plan.



2 The plan: each visit and where it stands.

Each visit is planned as a follow-up. Nothing is charged or sent. When a visit is near, open the plan and tap **Book visit**: it becomes a normal job, with the price per visit as its charge. The job shows which plan visit it is, such as "Plan visit 2 of 4".

Plans ending in the next 30 days show under **Plans ending soon** in Follow-ups. Open the plan and tap **Renew the plan** for another round, or **Let it end**. **End the plan** stops it early; visits not booked yet are set aside.

Pro: Service plans are part of Pro. On Free, a plan you already made stays visible.

Text your customers from your phone

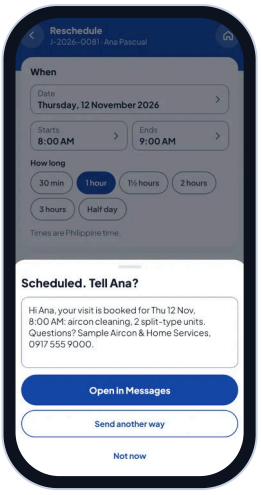
ServicePocket writes the texts for the moments that matter: booking confirmed, the day before, on the way, quote ready, job done, payment reminder, moved or cancelled, quote follow-up, due for service, and asking for a review. You send them from your own phone, on your own load.

First, ask the customer if they are OK with texts:

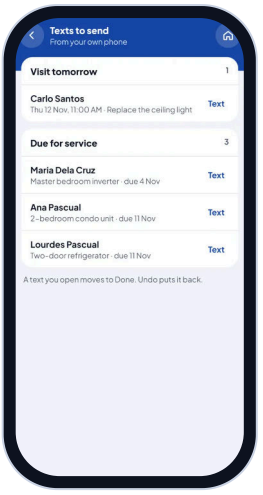
1. Open the customer, then edit their details.
2. Under **Texts**, tick **OK to send texts** only if they said yes.

With it off, nothing is sent for you, and service-due texts stay out of Texts to send.

To send a text:



1 A prepared text, ready to send from your phone.



2 Texts to send: tomorrow's visits and customers due.

1. On a job, find **Texts for this job** and tap **Text** beside the message. Or open **Texts to send** from Home or More.
2. Check the words. Changes here are for this text only.
3. Tap **Open in Messages**, then Send. Or tap **Send another way** for a chat app.

Texts to send lists tomorrow's visits and customers due for service. A text you open moves to **Done today**; **Undo** puts it back. To change the words for every text, open More, then Settings, then **Customer texts**.

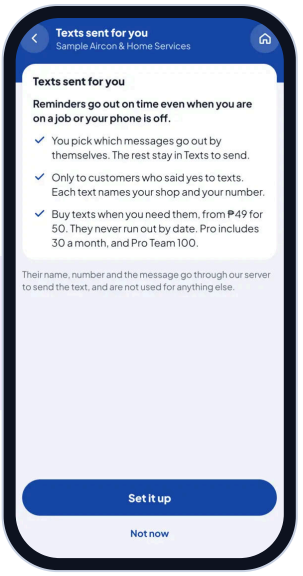
Texts sent for you

ServicePocket can also send texts for you, on time, even when you are on a job or your phone is off. Any shop in the Philippines can use it.

1. Open More, then Settings, then **Customer texts**.
2. Under **Sent for you**, tap **See how it works**, then **Set it up**. You sign in with your number once.
3. Under **Send these by themselves**, pick the messages that go out by themselves. The rest stay in Texts to send.
4. Tap **Add texts** to buy texts ahead. They stay with your shop until you use them.

Texts go only to customers who said yes to texts, and only from 8 AM to 8 PM; on the way can also go while you are open. Payment reminders are always yours to send, so a customer never gets one by mistake. If you run out of texts, nothing is lost: that day's texts move to Texts to send. **What was sent** shows the last 30 days.

Pro: Pro includes 30 texts a month and Pro Team 100. Texts you buy come on top.



Pick which texts go by themselves.

Reminders on time

Some phones put apps to sleep and hold their reminders until you open the app. Allowing alarms and reminders lets ServicePocket wake up at the right minute.

1. Open More, then Settings. Under **New jobs**, tap **Reminders on time**. Phones that do not need it do not show this row.
2. Tap **Open phone settings**.
3. Turn on **Allow alarms and reminders** for ServicePocket, then come back.

The app may also ask **Want reminders on time?** the first time, and a job may say **Reminders may come late on this phone** with **Allow reminders on time**. While a reminder is due within 2 days, a small alarm icon shows at the top of the phone.

10. Reports and insights

See how much work you finished, what you charged and collected, and which services and customers bring in the most.

What the numbers are for

Reports and Insights are your own records, to help you run the shop. They are not for tax filing and not an audited figure, and the app says so on each screen.

Everything is worked out on your phone from the jobs you finished. A job counts on the day it was finished, not the day it was booked.

> **Note:** In a team shop, only the owner sees Reports, and managers too when the owner allows it in **Team rules**. Technicians never see costs or reports.

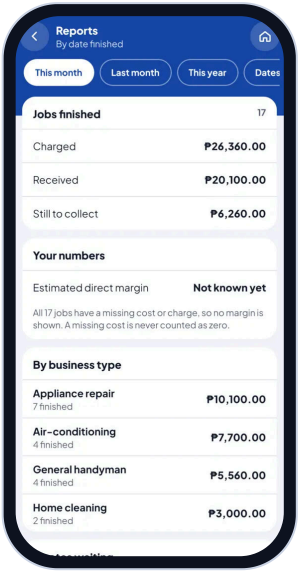
Open your report

1. Tap **More**, then **Reports**.
2. Pick a period at the top: **This month**, **Last month** or **This year**.
3. For other days, tap **Dates**, set **From** and **To**, then tap **Show**. Both days are included.

The **Jobs finished** card shows how many jobs you finished in that period, and three amounts:

- **Charged**: what those jobs were charged.
- **Received**: the payments you recorded for them.
- **Still to collect**: what the customers still owe.

If some finished jobs have no charge set yet, the card says how many, so you can set them.



The report for this month: jobs finished, charged, received and still to collect.

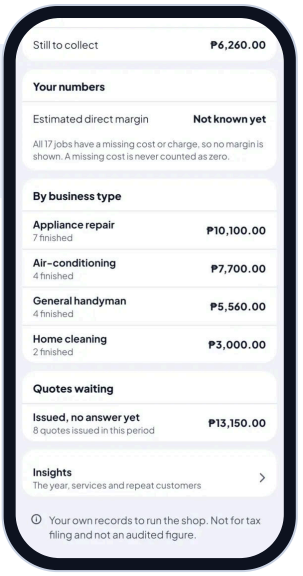
Your margin

The **Your numbers** card shows the **Estimated direct margin**: what you charged, less the direct costs you recorded on the jobs, such as materials and labor.

A job with a missing cost or a missing charge is left out, and the card says how many were left out. A missing cost is never counted as zero, so the margin is never better than it really

is. When no job has all its costs, the margin shows **Not known yet**.

> **Tip:** To make your margin more complete, give your materials a cost in the catalog, and fill in the labor on each work order.



Your numbers: the estimated direct margin, with jobs left out when a cost is missing.

Business types and waiting quotes

Under **By business type**, each of your business types shows how many jobs it finished, such as aircon cleaning or car detailing.

Under **Quotes waiting**, **Issued, no answer yet** counts quotes from this period that the customer has not answered. Follow them up from Home, as the quotes chapter explains.

Insights

Insights look at the whole year so far and answer three questions: how this year compares with last year, which services earn the most, and who your best repeat customers are.

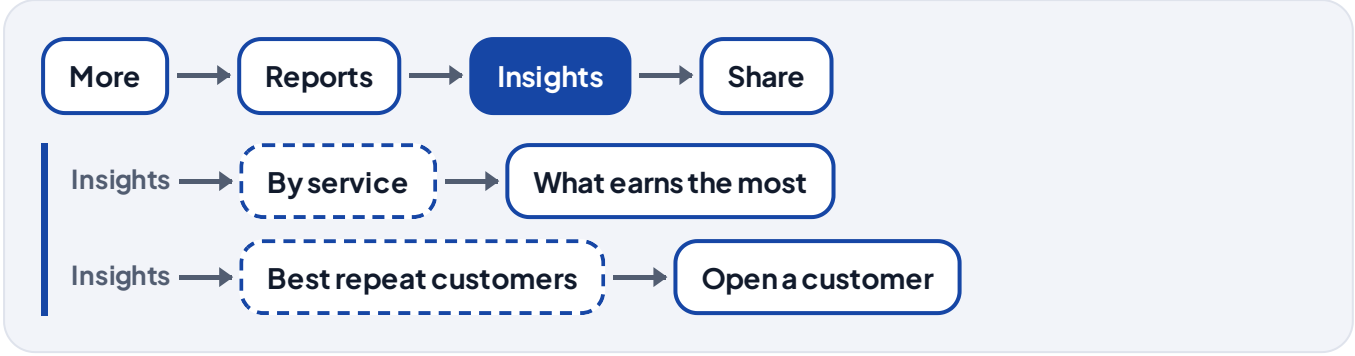
> **Pro:** Insights are part of Pro and Pro Team. On Free, the **Insights** card in Reports explains them, with **See Pro**.

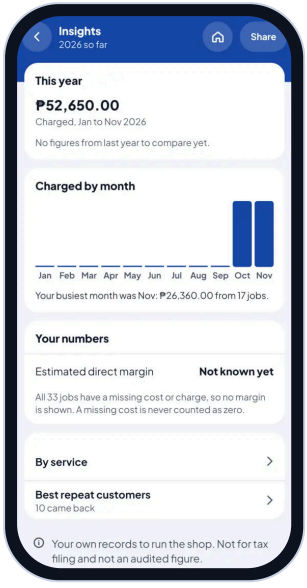
1. Tap **More**, then **Reports**.
2. Tap **Insights**, under the report's cards.
3. Read the cards from the top: **This year**, **Charged by month**, and **Your numbers**.

This year sets what you charged this year so far against the same months last year, such as "₱8,450.00 more than last year". **Charged by month** shows each month, and names your busiest month.

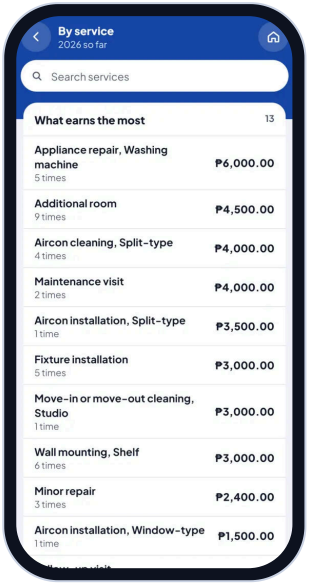
Below them are two more screens:

- **By service**: **What earns the most**, each service with what it brought in and how many times you did it. Search helps when the list is long. A service has no margin of its own, because costs belong to the whole job.
- **Best repeat customers**: customers with 2 or more jobs this year, most first, with what they brought in and their last visit. A customer whose last visit was over 6 months ago is marked, so you can call them.

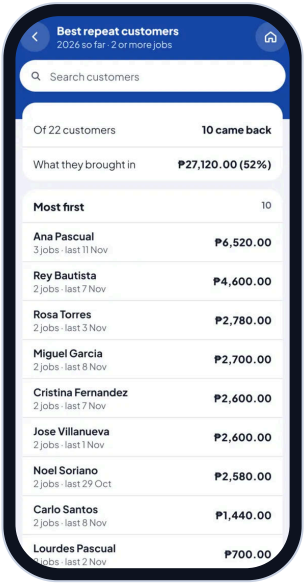




1 Insights: this year against last year, and charged by month.



2 By service: what earns the most.



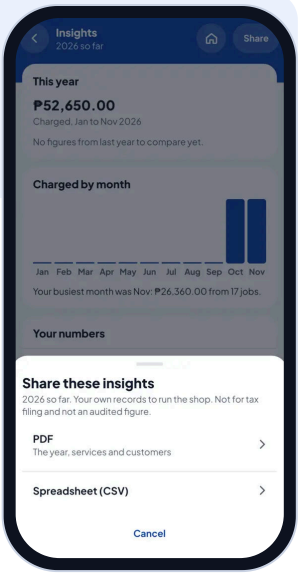
3 Best repeat customers, most first.

Share your insights

1. On **Insights**, tap **Share**.
2. Pick **PDF** for a clean summary of the year, its services and customers.
3. Or pick **Spreadsheet (CSV)** for every row, to open in a spreadsheet app.
4. Choose how to send or save it.

The PDF lists the top 25 services and customers. The spreadsheet keeps them all.

Tip: For a spreadsheet of your customers, jobs and payments, use **Export to a spreadsheet (CSV)** in **Data and backups**. The data chapter explains it.



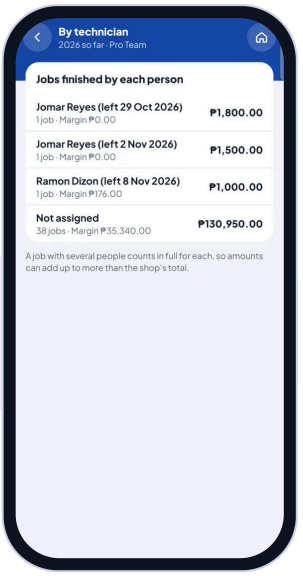
Share as a PDF or a spreadsheet.

Insights by person

In a team shop, **By technician** shows **Jobs finished by each person** this year, with what they charged and the margin. A job done by several people counts in full for each of them, so the amounts can add up to more than the shop's total. Jobs nobody was assigned to show as **Not assigned**.

Pro: Insights by person are part of Pro Team, and only people who can see costs see them.

1. Open **Insights**.
2. Tap **By technician**.



By technician: jobs finished by each person.

11. Working as a team

Give your technicians and office staff the shop on their own phones, each seeing and doing only what their role allows.

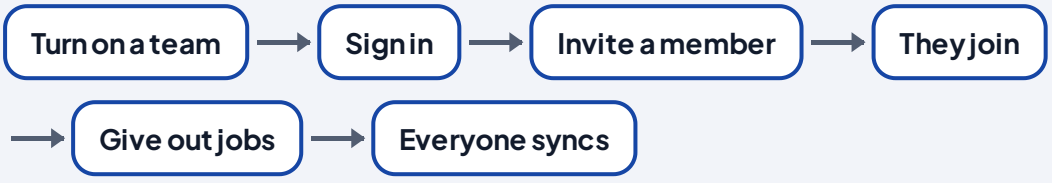
How a team works

On your own, you need no account: everything stays on your phone. When you turn on a team, your shop goes online, kept on ServicePocket's server in Singapore, and only your team can see it.

- Everyone works on their own phone, signed in with their own mobile number.
- Every phone works without signal, and catches up when it is back online.
- Roles decide what each person sees. Technicians see only their own jobs, and never your costs.
- You stay the owner, and you can remove anyone at any time.

From then on, job and quote numbers come from the server, so two phones never use the same number.

Pro: A team needs a paid plan. Pro covers you and 1 personnel; Pro Team covers you and 5. Personnel are the people besides you, and you are never counted. The plans chapter has the prices.



Start a team

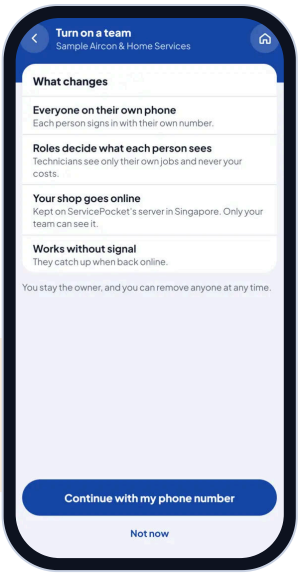
A team needs an account, and your account is your mobile number. Your number is only for signing in and showing your team it is you. Customers never see it.

1. Tap **More**, then **Settings**.
2. In the **Team** card, tap **Turn on a team**. On Free, the button says **See how a team works** instead.
3. Read **What changes**, type your name, and tap **Continue with my phone number**.
4. Type **Your mobile number** and tap **Text me a code**. Philippine, Malaysian and Singaporean numbers work.

5. Type the **6-digit code** from the text, then tap **Sign in**.
6. Tap **Turn on the team**.
7. Keep ServicePocket open while **Putting your shop online** sends your records. Photos keep going in the background while you use the app.

When it is done, the app says **Your team is ready**.

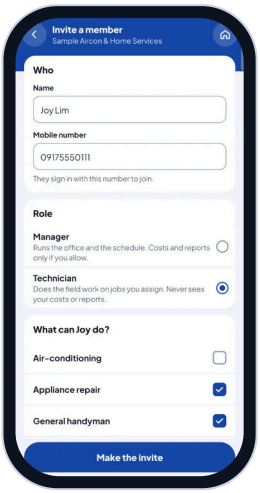
Note: Never share the sign-in code. ServicePocket never asks for it by call or message.



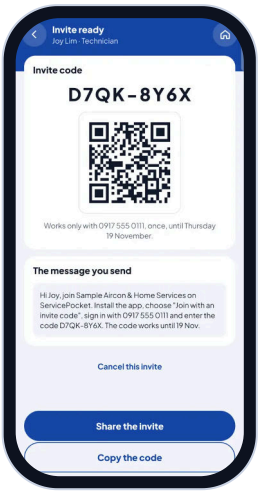
Turn on a team: what changes.

Invite a member

1. Tap **More**, then **Settings**, then **Members** in the **Team** card. This opens the **Team** screen.
2. Tap **Invite a member**.
3. Type their **Name** and **Mobile number**. They sign in with this number to join.
4. Pick their **Role**: **Manager** or **Technician**. Then tap **Make the invite**.
5. Tick **What can they do?**, so the app can suggest them for the right jobs.
6. Tap **Share the invite** and send the message by text or chat, or tap **Copy the code**.



1 Invite a member: name, number and role.



2 The invite is ready to share.

The invite works only with that number, once, for 7 days. Changed your mind? Open the invite and tap **Cancel this invite**: the code stops working at once.

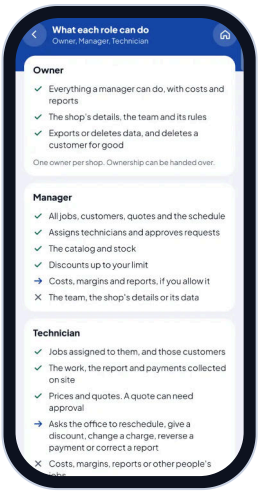
On their phone, the new member installs ServicePocket, taps **Join with an invite code**, types the code or taps **Scan the QR code instead**, then taps **Sign in and join**.

The three roles

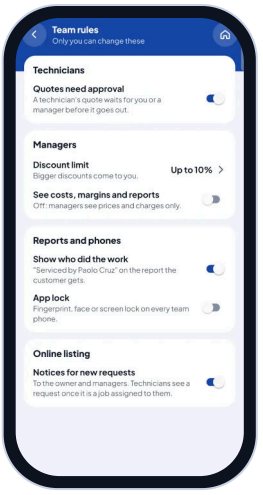
Owner: one per shop. That is you.

- Sees every job, customer and quote, with costs, margins and reports.

- Sets the shop's details, the catalog, prices and the team rules.
- Invites and removes members, exports or deletes data, and deletes a customer for good.



1 What each role can do.



2 Team rules, set by the owner.

Manager: runs the office and the schedule.

- Sees all jobs, customers, quotes and the schedule.
- Assigns technicians and answers their requests.
- Looks after the catalog and stock, and gives discounts up to the limit you set.
- Sees costs, margins and reports only if you allow it.
- Never changes the team, the shop's details or its data.

Technician: does the field work on the jobs you assign.

- Sees the jobs assigned to them, with their customers and addresses.
- Starts and finishes jobs: checklist, photos, items used and the service report.
- Makes quotes, which the office can approve before they go out, and records payments collected on site.
- Sees prices, but never costs, margins, reports or other people's jobs.

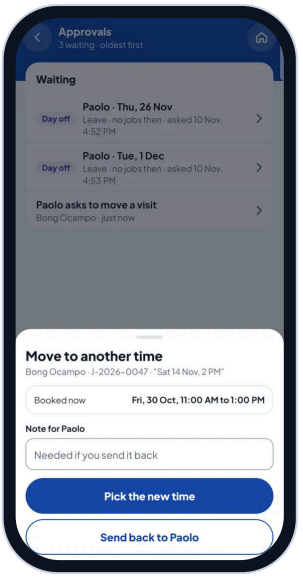
Set what managers and technicians may do in **Team rules**, on the **Team** screen. Only the owner can change them:

- **Quotes need approval**: a technician's quote waits for you or a manager before it goes out.
- **Discount limit**: bigger discounts from managers come to you.
- **See costs, margins and reports**: off means managers see prices and charges only.
- **Show who did the work**: "Serviced by" and the person's name on the report the customer gets.
- **App lock**: every team phone asks for a fingerprint, face or the phone's screen lock when ServicePocket opens, and again after 5 minutes away. A phone with no screen lock is asked to set one first.

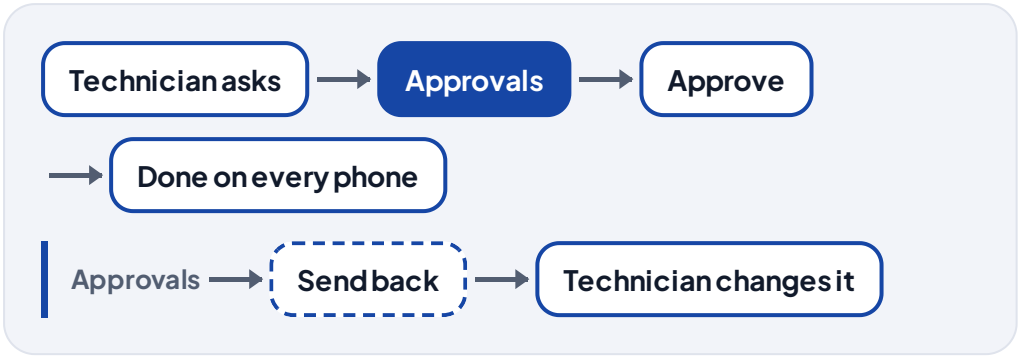
Approvals and Ask the office

Some things a technician cannot do alone. They ask, and you or a manager answer.

- A technician's quote waits for approval when **Quotes need approval** is on. They tap **Send for approval**.
- For anything else on a job, they tap **Ask the office** and pick **Move to another time**, **Give a discount**, **Change the charge**, **Reverse a payment** or **Correct the report**.
- They can also ask for a day off, from **More**, then **My skills and days off**.



A technician's quote waiting for approval.



1. On Home, find **Waiting for your approval**, oldest first, or tap **All approvals**.
2. Open a request. For a quote, tap **See it as the customer will**.
3. Tap **Approve and issue** for a quote, or **Approve**.
4. Or tap **Send back to** and the person's name, with a note that says what to change.

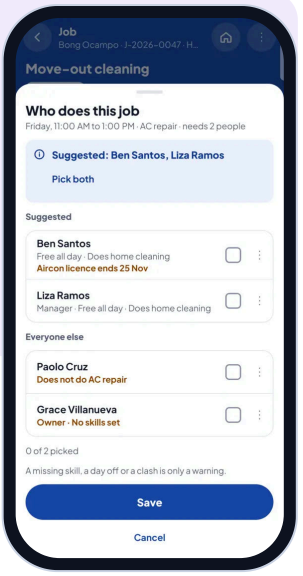
A discount above a manager's limit goes to the owner.

Give out jobs, with suggestions

1. Open the job and find **Assigned to**.
2. Tap **Assign**, or **Change**.
3. In **Who does this job**, pick one or more people, then tap **Save**.

Each person gets the job on their phone the next time it syncs. A clash is only a warning; you can still assign.

Pro: On Pro Team, the app suggests who fits the job and says why, such as "Free 1 PM to 5 PM" or "Served them on 3 Oct". It looks at skills, working hours, days off, other jobs at that time, licences, who served the customer before, nearby jobs and how busy each person is. A missing skill, a day off or a clash only warns: you always decide.



Who does this job: suggested people, with reasons.

To make suggestions better, set up your team's resources:

1. On the **Team** screen, tap **Team skills**. Pick a business type, then tick a person's box for every service of that kind, or open it to pick single services.
2. Skills found from finished jobs show in dashed boxes. Tap **Keep all** and the number found to keep them.
3. Open a person on the **Team** screen to set their **Working hours** (**Same as the shop** unless you change it) and **Days off**, with **+ Add a day off**.

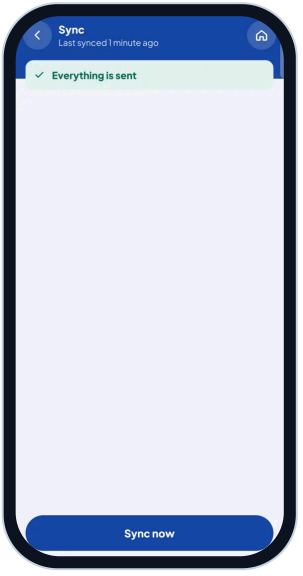
A person with every service of a business type also gets the new services you add to it later.

Sync and the sync chip

Changes go up and come down by themselves whenever a phone has signal. The chip at the top of Home shows how it is going:

- **Synced** and a time: everything is sent.
- **Offline**, with how many changes are waiting: keep working. They go up when you are back online.
- **Needs you**: a change could not go through. Tap the chip to see it. Your other work is not held up.

When two people changed the same thing, the app shows **Changed by two people** and lets you keep one whole version. To send now, tap the chip, then **Sync now**.
On the **Team** screen, a person not synced for 3 days or more shows an amber line, so you can check on them.



The sync screen, opened from the chip on Home.

Remove a member, or hand over the shop

To remove someone, such as Ana:

1. On the **Team** screen, tap Ana's name.
2. Tap **Remove Ana from the team**, then **Remove Ana Cruz** to confirm.

They lose access at once, and the shop's customers, jobs and photos leave their phone the next time it connects. Jobs they did keep their name, and jobs not finished yet go back to **Not assigned**. Anything they changed offline and never sent is set aside for you to look at, never added on its own.

To correct someone's name, such as when it was misspelled on the invite:

1. On the **Team** screen, tap their name.
2. Tap **Name**, type the name as it should be, and tap **Save**. This needs a moment online.

Their phone shows the new name the next time it syncs. Quotes and reports already made keep the name they were made with. Only you, the owner, can change a name; to correct your own, open **More**, **Settings**, then **My account** and tap **Name**.

To make someone else the owner:

1. On the **Team** screen, tap Ana's name.
2. Tap **Make Ana the owner**, then **Ask Ana to take over**. This needs a moment online.
3. Ana taps **Become the owner** on their phone within 7 days, or **Say no**.

Until they accept, you stay the owner and can tap **Take it back**. Once they accept, you become a Manager who sees costs and reports, and you cannot take ownership back yourself.

Note: If your plan ends, the others can only look at the shop for 14 days. Renew within those days and they carry on as before.

When your plan covers fewer people

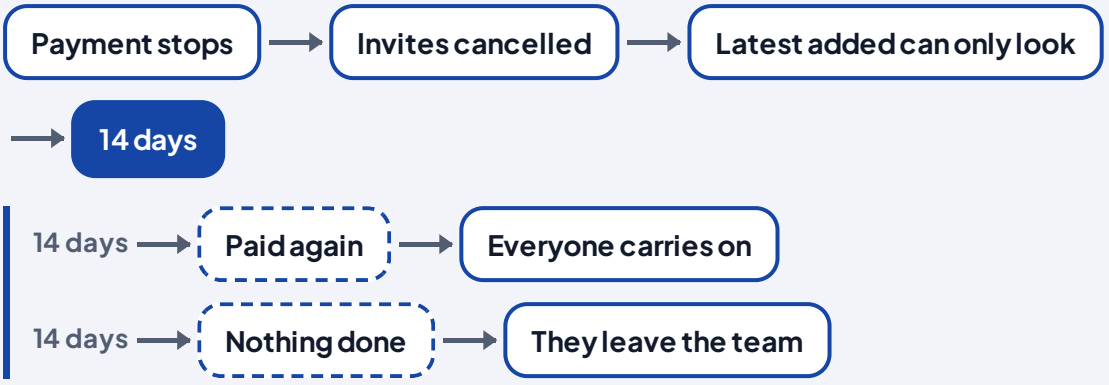
Sometimes your plan pays for fewer personnel than your team has, such as when a payment for extra personnel stops. Your shop keeps working, and only the people not paid for are affected.

- Invites not used yet are cancelled first.
- Then the people added most recently can only look at the shop for 14 days, and they see why on every screen.
- After the 14 days they leave the team, as if you had removed them.

On Home, **Needs attention** shows who can only look and until when. To choose who keeps working instead:

1. Tap **Choose who stays**, or open **Team** and tap it there.
2. Tick as many people as your plan covers. The screen counts them for you.
3. Tap **Save**.

You can change your choice any time in the 14 days, and the 14 days stay the same. To keep everyone, tap **Pay again** and pay for the people you need: they carry on at once, and what they did while waiting is sent.



12. Your data and backups

Your records live on your phone, locked. Keep a backup so a lost or broken phone never costs you your customers and jobs.

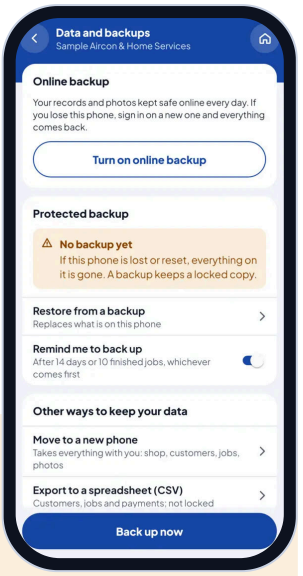
Your data stays on your phone

Everything you add, from customers and jobs to photos and payments, is saved on your phone and locked (encrypted). The app works with no signal, and you need no account.

That also means one thing to remember: if this phone is lost or reset, everything on it is gone. A backup keeps a locked copy somewhere else.

All your backup tools are in one place: tap **More**, then **Settings**, then **Data and backups**.

Note: In a team shop, your records are also kept online for your team. The team chapter explains it. Only the owner sees **Data and backups**.

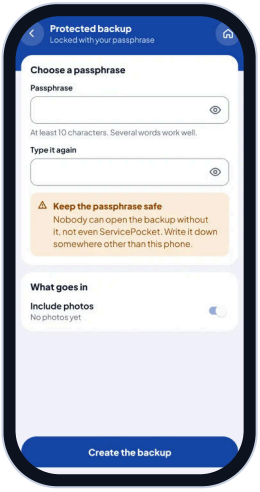


Data and backups: every way to keep your records safe.

Make a protected backup

A protected backup is one file that holds your whole shop, locked with a passphrase you choose. Nobody can open it without the passphrase, not even ServicePocket.

1. In **Data and backups**, tap **Back up now**.
2. Type a passphrase of at least 10 characters. Several words work well, such as "mango jeepney blue tuesday".
3. Type it again.
4. Leave **Include photos** on, unless the phone is short of space. Without photos, reports open but show no photos.
5. Tap **Create the backup**, and keep the app open while it works.



1 Choose a passphrase, and decide on photos.



2 Backup saved, with the file name and folder.

6. Choose a folder for the file. Android does not let apps save into the Download folder itself, so pick or make a folder inside it.

The file is named after the day, such as ServicePocket-2026-11-11.spbackup. Only a saved file counts as a backup.

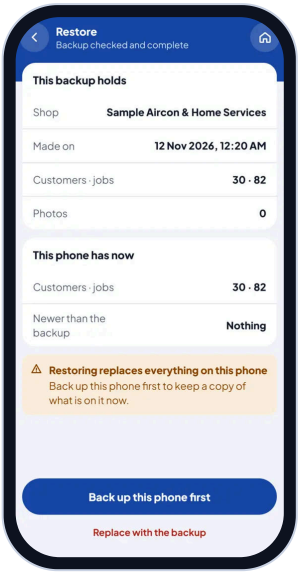
> **Tip:** Write the passphrase down somewhere other than this phone. Then copy the file off the phone, to online storage or a computer, with **Share the file**.

With **Remind me to back up** on, Home reminds you after 14 days or 10 finished jobs, whichever comes first.

Restore a backup

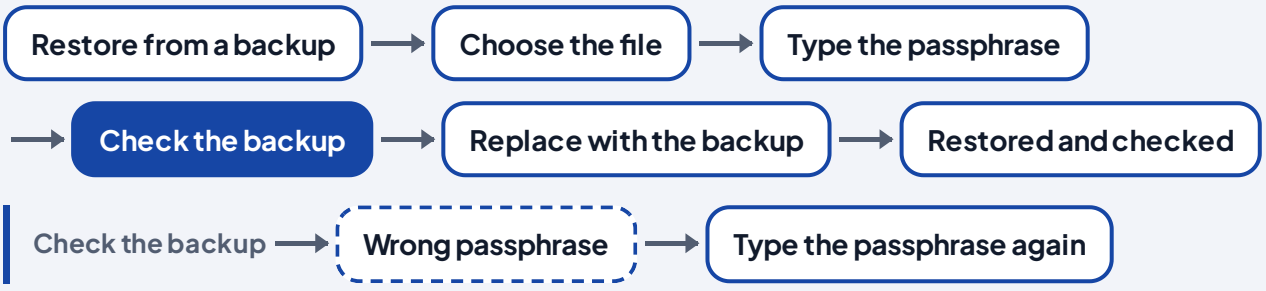
Restoring replaces everything on this phone with what is in the backup.

1. In **Data and backups**, tap **Restore from a backup** and choose the .spbackup file.
2. Type the passphrase for that backup, then tap **Check the backup**. Nothing on the phone changes yet.
3. Look at **This backup holds**: the shop, the day it was made, and its customers, jobs and photos.
4. To keep a copy of what is on the phone now, tap **Back up this phone first**.
5. Tap **Replace with the backup**.



The backup checked: what it holds, before anything changes.

When it is done, the app shows **Restored and checked**, and your follow-up and appointment reminders are set again. Tap **Go to Home**.



Online backup

Pro: Online backup is part of Pro and Pro Team.

With online backup on, a copy of your records and photos goes online by itself whenever you have signal. It is kept on ServicePocket's server in Singapore, and only you can open it, by signing in with your number. You can also use a second phone with the same shop, so you have 2 phones in all.

1. In **Data and backups**, tap **Turn on online backup**.
2. Sign in with your mobile number and the code we text you.
3. Tap **Put my shop online**. Use a strong signal or Wi-Fi for the first copy. Photos can follow later.

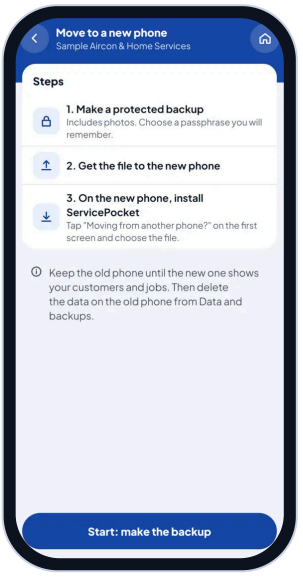
To get your shop back on a new phone, install ServicePocket, tap **Sign in to my shop** on the first screen, and sign in with the same number. The app says **We found your shop**. Tap **Bring my shop here**.

To stop, tap **Turn off online backup**. Your shop stays on this phone and keeps working. The copy online is kept for 90 days, so you can change your mind, or you can delete it at once.

Move to a new phone

Without online backup, move with a protected backup file.

1. On the old phone, open **Data and backups** and tap **Move to a new phone**.
2. Tap **Start: make the backup**. It includes photos. Choose a passphrase you will remember.
3. Get the file to the new phone, for example through online storage or a cable.
4. On the new phone, install ServicePocket and tap **Moving from another phone?** on the first screen. Then tap **Restore from a backup** and choose the file.



Move to a new phone, step by step.

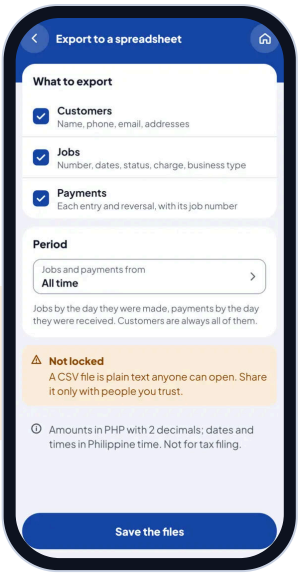
Keep the old phone until the new one shows your customers and jobs. Then delete the data on the old phone, as the last section explains.

Export to a spreadsheet

A CSV file opens in any spreadsheet app, so you or your bookkeeper can read your lists.

1. In **Data and backups**, tap **Export to a spreadsheet (CSV)**.
2. Under **What to export**, tick **Customers**, **Jobs** and **Payments**.
3. Under **Period**, pick **All time**, **This month**, **Last month**, **This year** or **Last year**. Customers are always all of them.
4. Tap **Save the files** and choose a folder.

Note: A CSV file is not locked. Anyone can open it, so share it only with people you trust. It is not for tax filing.



Export to a spreadsheet: what and which period.

Archive, delete a customer, or delete everything

Archive hides a customer from your lists, while their jobs, quotes and reports stay.

1. Open the customer and tap the menu at the top right.
2. Tap **Archive**, and confirm. To undo it later, open the customer and tap **Bring back**.

Delete permanently is for a customer who asked to be forgotten. It removes them and their jobs, quotes, reports, photos, payments and follow-ups from this phone, and cannot be undone.

1. Open the customer, tap the menu, then **Delete permanently**.
2. To keep a copy, tap **Export first**.
3. Type DELETE, then tap the button with the customer's name.

Backups you made earlier still hold that customer. They are your files to delete.

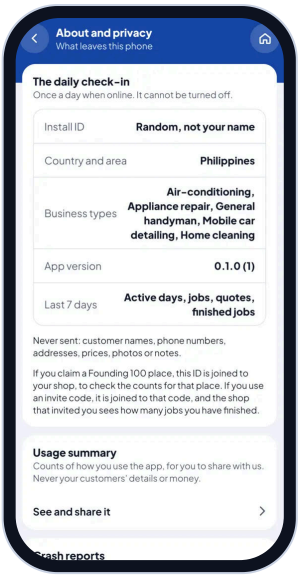
Delete all data on this phone removes the shop, catalog, customers, jobs, quotes, reports, photos, payments and settings. ServicePocket cannot bring them back.

1. In **Data and backups**, tap **Delete all data on this phone**.
2. Tap **Back up first** or **Export to CSV** if you want a copy.
3. Type DELETE and tap **Delete everything**.

What leaves your phone

For a shop on its own, only these leave the phone:

- **The daily check-in**, once a day when online. It cannot be turned off. It sends a random install ID (not your name), your country and area, your business types, the app version, and counts for the last 7 days: active days, jobs, quotes and finished jobs. It never sends customer names, phone numbers, addresses, prices, photos or notes.
- **Crash reports**, only if you switch on **Send crash reports**. They are off by default, and carry no customer names, phones, addresses or photos.
- **What you choose to share**, such as a quote PDF or a text from your own phone.



About and privacy: the daily check-in and crash reports.

To see this for yourself, or to switch crash reports on or off:

1. Tap **More**, then **Settings**.
2. Tap **About and privacy**.

13. Plans and prices

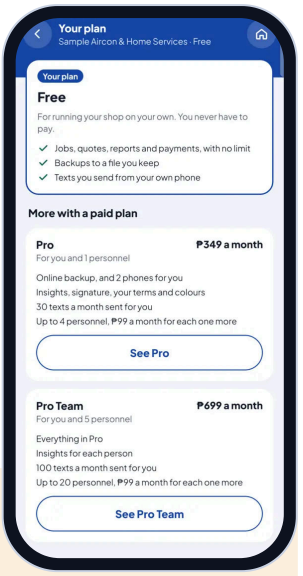
Run your shop free for as long as you like. Pay only when you want online backup, insights, nicer documents or a team.

Free, with nothing locked

ServicePocket has three plans: **Free**, **Pro** and **Pro Team**. There are no ads on any plan. Whatever plan you are on, everything you made stays yours: you can always see, change, back up and export your own records.

To see your plan:

1. Tap **More**, then **Settings**.
2. In the **Plan** card, tap your plan. The **Your plan** screen opens, with the prices for your shop.



Your plan, with the prices for your shop.

Note: The prices here are for the Philippines, and they may change. The **Your plan** screen always shows the prices that apply to your shop. Buying may not be open yet: then the app says **Buying opens soon**, and your shop keeps working as it is.

Free is for running your shop on your own, and you never have to pay:

- Jobs, quotes, reports and payments, with no limit.
- Your logo on quotes and reports.
- Backups to a file you keep, and export to a spreadsheet.
- Texts you send from your own phone.

Pro

Pro is ₱349.00 a month, or ₱3,490.00 a year, for you and 1 personnel. Personnel are the people in your shop besides you, such as a manager or a technician. You are never counted.

- Online backup, and 2 phones for you.
- Insights: what earns the most, and who comes back.
- Your terms, warranty note and colours on documents, and the customer's signature on reports.
- Service plans for your regular customers.

- 30 texts a month sent for you.
- Up to 4 personnel, at ₱99.00 a month for each one more.

Pro Team

Pro Team is ₱699.00 a month, or ₱6,990.00 a year, for you and 5 personnel, each on their own phone.

- Everything in Pro.
- Insights for each person.
- Suggestions of who fits each job, from skills, hours and days off.
- 100 texts a month sent for you.
- Up to 20 personnel, at ₱99.00 a month for each one more.

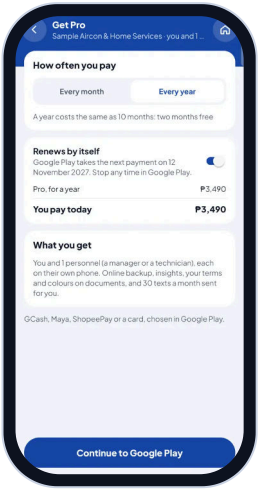
Need more than 20 personnel? Add them one by one until you reach 20, then tap **Talk to us**, and we raise it for you.

How the price adds up

Only you pay; your personnel pay nothing. A year costs the same as 10 months, so you get two months free.

Some examples, for a month:

- Pro with 1 personnel: ₱349.00.
- Pro with 3 personnel: ₱349.00 and 2 more at ₱99.00, so ₱547.00.
- Pro with 4 personnel: ₱646.00. This is as big as Pro goes.
- Your 5th personnel moves you to Pro Team: ₱699.00 for you and 5, which is ₱46.00 less than Pro would be.
- Pro Team with 8 personnel: ₱699.00 and 3 more at ₱99.00, so ₱996.00.



1 Get Pro: how often you pay and what you get.



2 Change the number of personnel.

To change how many personnel you pay for, open **Your plan** and tap **Change the number of personnel**. More personnel cost the difference for the days left; fewer cost less from the next payment.

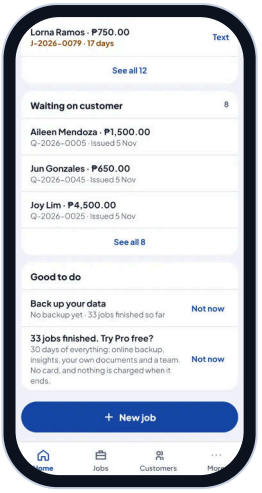
You pay every month or every year. With **Renews by itself** off, you pay once for one month or one year, and nothing more is taken. Paying once covers only you and 1 personnel on

Pro, or you and 5 on Pro Team. You can pay with GCash, Maya or a card, chosen in Google Play.

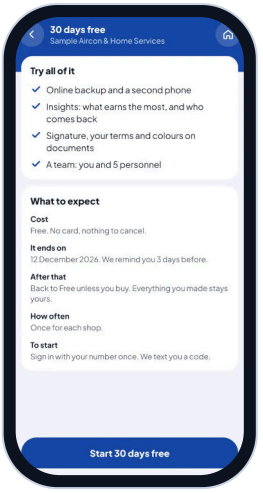
The 30-day free trial

After your 10th finished job, Home shows a card: "10 jobs finished. Try Pro free?" The trial gives you everything in Pro Team for 30 days, for you and 5 personnel. It needs no card, and there is nothing to cancel.

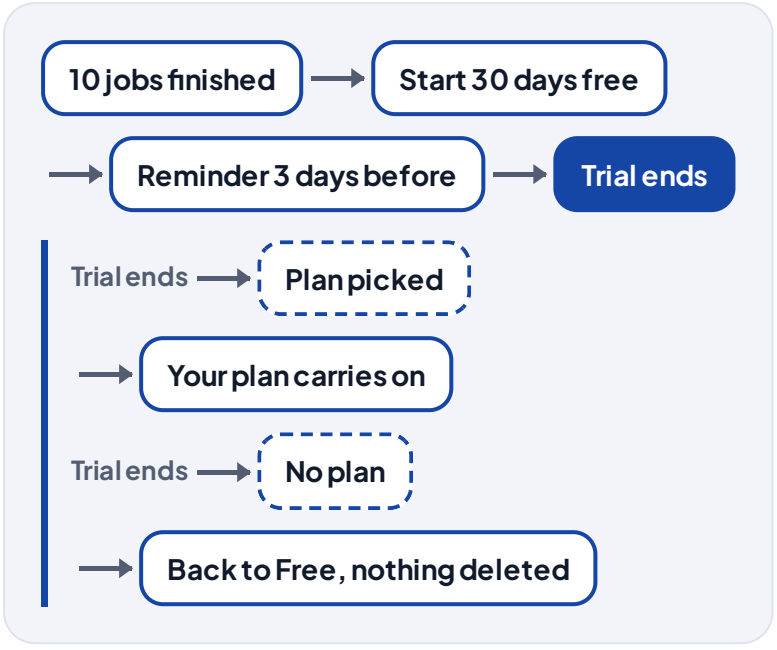
1. On Home, tap the trial card.
2. Read **Try all of it** and **What to expect**.
3. Tap **Start 30 days free**, and sign in with your number once. We text you a code.



1 The free trial card on Home.



2 30 days free: try all of it.



- Each shop gets the trial once.
- The trial includes no monthly texts, but you can still buy texts.
- A plan you buy during the trial starts the day you buy it.
- Tap **Not now** on the offer, and it comes back after 14 days.

Founding 100

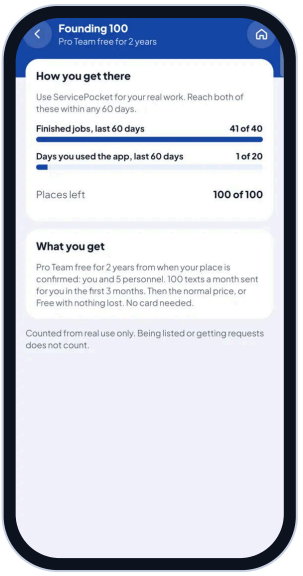
The first 100 shops that really use ServicePocket after the launch get Pro Team free for 2 years, for you and 5 personnel. It needs no card.

- The 2 years start the day we confirm your place.

- 100 texts a month are sent for you in the first 3 months. After that, buy texts when you need them.
- Once your place is confirmed, your shop is like any other Pro Team shop: there is no place number.

For now, you qualify by reaching 40 finished jobs and 20 days of using the app, within any 60 days in a row. Only real use counts.

1. Open **Your plan** and tap **Founding 100**.
2. Watch your progress and the places left.
3. When the screen says **You made it**, tap **Claim my place**, and sign in with your number once.



Founding 100: your progress and the places left.

We look at each shop before its place is confirmed, usually within a day. To check your counts, claiming joins your phone's daily check-ins to your shop: only the counts in them, never your customers, prices or notes.
Your plan then shows **Pro Team, free until** the day it ends.

Founding 100 with more than 5 personnel

Your free Pro Team covers you and 5 personnel, whatever the size of your team, until its 2 years end. Each personnel above 5 costs ₱99.00 a month, paid through Google Play.

1. Open **Your plan** and tap **Change the number of personnel**.
2. Pick the number. The screen shows what you pay now, such as ₱198.00 a month for 7 personnel.
3. Tap **Continue to Google Play** and pay there.

If that payment stops, only the personnel above 5 are affected: they can only look at the shop for 14 days, then they leave it. You choose who stays; the people added last go first unless you pick others. The team chapter shows how. Going back to 5 stops the payment.

When Founding 100 ends

Home reminds you 30 days and 3 days before, with the price of Pro Team for your team, such as ₱798.00 a month with 6 personnel. On the last day, the payment for personnel above 5 stops. Then choose Pro Team at your size, or go on Free and keep every record.



Texts bought ahead

Texts sent for you are reminders and messages ServicePocket sends to your customers on time, even when your phone is off. Any shop in the Philippines can use them, on any plan. The follow-ups chapter explains how they work.

- 50 texts for ₱49.00.
- 100 texts for ₱95.00.
- 500 texts for ₱449.00, which saves ₱26.00.

Tap a pack, and Google Play shows its own payment sheet with the price: confirm there, or close it to buy nothing. The texts are added once Google Play confirms the payment. Texts you buy stay with your shop until you use them; they never run out by date. Pro's 30 texts and Pro Team's 100 texts come each month and do not carry over. A long message can count as more than one text.

When a paid plan ends

Your shop moves back to Free, and nothing is deleted.

- Online backup stops taking new copies. The last copy stays online for 90 days, in case you come back.
- Your personnel can only look at the shop for 14 days. Renew within those days and they carry on as before.
- Insights and document extras stop, and the documents you already made stay as they are.

14. Settings, and when something goes wrong

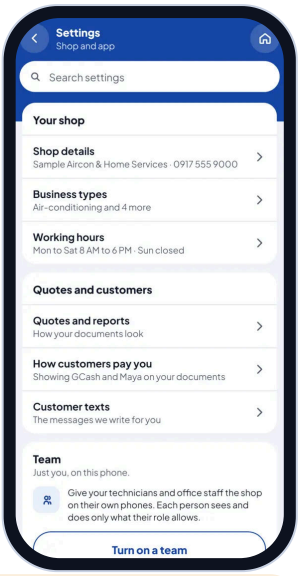
Set the app up your way, and know what to do when a reminder is late, the signal drops or a backup will not open.

Find your way around Settings

Tap **More**, then **Settings**. The settings come in cards:

- **Your shop**: **Shop details**, **Business types** and **Working hours**.
- **Quotes and customers**: **Quotes and reports** (how your documents look), **How customers pay you** and **Customer texts**.
- **New jobs**: the reminders new appointments start with.
- **Your data**: **Data and backups**, and the app lock.
- **Plan**, **Team** and **App**: your plan, your team, **Text size** and **About and privacy**.

Looking for one setting? Type in **Search settings** at the top.



Settings, in cards, with a search at the top.

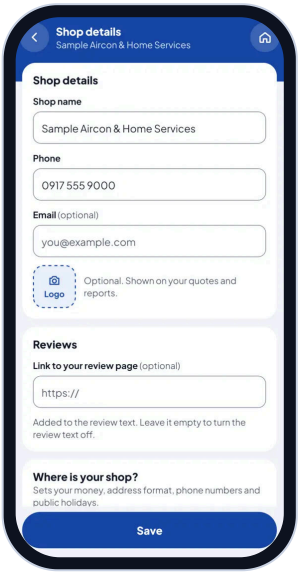
Note: In a team shop, managers and technicians see fewer settings. The shop's setup belongs to the owner.

Shop details and business types

Your shop details print on every quote and report, so keep them right.

1. In **Settings**, tap **Shop details**.
2. Check the **Shop name**, **Phone** and **Email**. Every shop needs a phone number, so customers can reach you.
3. Tap **Logo** to add or change your logo. A square picture works best.
4. Under **Reviews**, paste the **Link to your review page**, starting with https://. Any site works. Leave it empty to turn the review text off.
5. Add or change the **Shop address**. It is optional.
6. Tap **Save**.

Your country sets your money, address format, phone numbers and public holidays. It is fixed once your shop has a quote or a job.



Shop details: name, phone, logo and review link.

To add or remove a trade, tap **Business types**. When you tick a new one, the app offers that trade's suggested services, so you can add them to your catalog.

Working hours, holidays and days off

New appointments start inside your working hours, and the texts sent for you follow them too. A time outside your hours is still allowed; the schedule screen only shows a note.

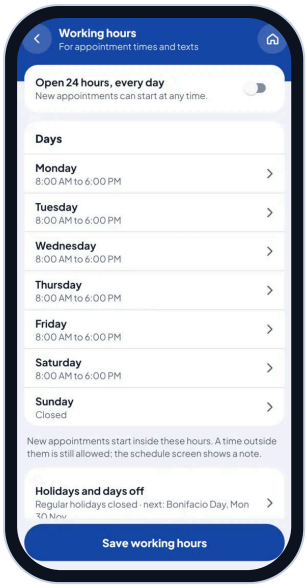
1. In **Settings**, tap **Working hours**.
2. Tap a day. Switch **Open this day** on or off, then set **Opens** and **Closes**. A closing time after midnight is fine: it shows as the next day.
3. To copy one day to the rest, tap **Use these hours for every open day**.
4. Open all the time? Switch on **Open 24 hours, every day**.
5. Tap **Save working hours**.

At the bottom of **Working hours**, tap **Holidays and days off**. The national holidays come from the official list. Out of the box, regular holidays are closed and special days keep your usual hours. Tap a holiday to choose **Closed**, **Open, usual hours** or **Open, special hours** for that date.

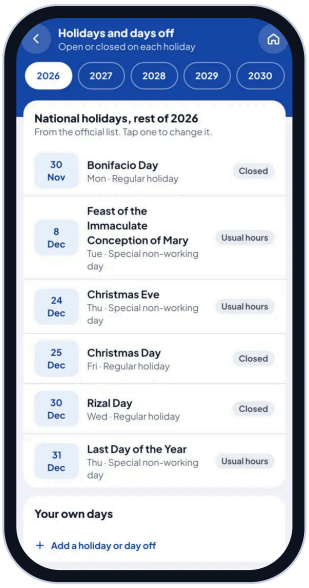
To add a town fiesta, a declared day or your own vacation:

1. Tap **Add a holiday or day off**.
2. Pick what it is: **Local holiday**, **Declared non-working day** or **Day off**.
3. Give it a **Name**, such as "Pasig City Day".
4. Set the **First day**, and the **Last day** for more than one day. Switch on **Every year** if it comes back each year.
5. Choose how **Your shop that day** is: closed, usual hours or special hours. Then tap **Save**.

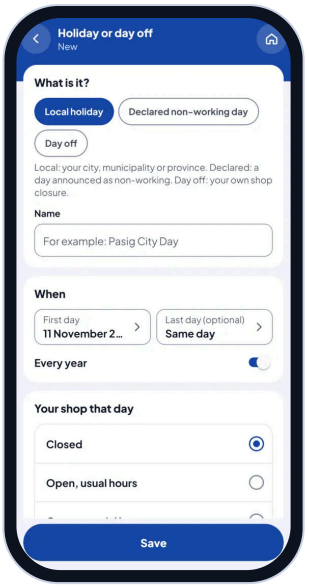
Holidays show as a note on the schedule and a bar on the calendar. Nothing is ever blocked.



1 Working hours, one row per day.



2 Holidays and days off: the national list and your own days.



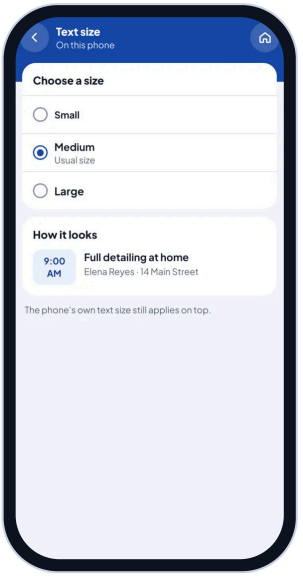
3 Add a holiday or day off.

Text size and the dark look

1. In **Settings**, tap **Text size**.
2. Pick **Small**, **Medium** or **Large**, and check **How it looks**.

The size is for this phone only, and the phone's own text size still applies on top.

ServicePocket follows your phone's light or dark setting. To change it, change the display setting on your phone.



Text size: Small, Medium or Large.

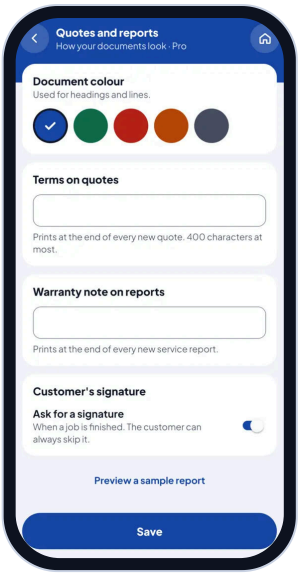
How your documents look

Pro: Document colours, your terms, a warranty note and the customer's signature are part of Pro. On Free, your logo still prints on every quote and report.

1. In **Settings**, tap **Quotes and reports**.

2. Pick a **Document colour**: **Blue**, **Green**, **Red**, **Orange** or **Grey**. It is used for headings and lines.
3. Type your **Terms on quotes**, such as "Price valid for 15 days. 50% downpayment before work starts."
4. Type your **Warranty note on reports**, such as "30-day service warranty on labor."
5. Switch on **Ask for a signature**, so the customer signs on your phone when a job is finished. They can always skip it.
6. Tap **Preview a sample report** to check, then tap **Save**.

Changes apply to new quotes and reports. Documents already issued keep the look they had.



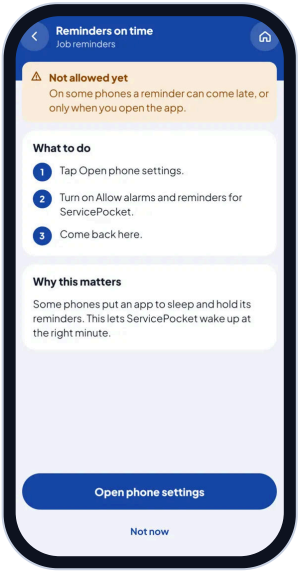
Quotes and reports: colour, terms, warranty note and signature.

Reminders that come late

Some phones put apps to sleep to save battery, and hold their reminders until you open the app. If your reminders come late, let ServicePocket wake up at the right minute:

1. In **Settings**, find the **New jobs** card and tap **Reminders on time**.
2. Tap **Open phone settings**.
3. Turn on **Allow alarms and reminders** for ServicePocket.
4. Come back to the app. The row now says **Reminders arrive when they should**.

A reminder due within 2 days then shows a small alarm icon at the top of the phone until it goes off. If a reminder is ever late again, check that this is still on.



Reminders on time, allowed.

No signal, a sync problem, or a backup that will not open

No signal. Keep working: the app works fully offline. A few things need a moment online, such as signing in, buying a plan and, in a team shop, issuing a quote or giving a new job its number. Until then, a new team job shows **Number when online**.

A sync problem (team shops). When the chip at the top of Home says **Needs you**, tap it.

- **Changed by two people**: pick which version to keep, theirs or **Use mine instead**.
- **Not taken by the server**: read **Why**. Often your role cannot make that change, and you can ask the office instead. Tap **Undo my change** to take the shop's version again.

A backup that will not restore. Nothing on your phone changes until a backup is checked, so you can try again safely.

- **Wrong passphrase**: check capital letters and spaces, then try again.
- **The file is damaged** or **The file is incomplete**: try another copy of the file.
- **Made by a newer app**: update ServicePocket, then restore.
- **Not enough space**: free some space on the phone and try again.
- **Not a ServicePocket backup**: choose the file that ends in .spbackup.
- **The file could not be read**: if the file is in online storage, download it to the phone first.

Getting help

1. Tap **More**, then **Help**.
2. Pick a **How do I...** topic, or type in **Search help**.
3. Follow the steps, or tap **Take me there** to jump to the right screen.

Busy screens also have a **?** at the top, with help for that screen. The full user manual is in **Help** too.
Still stuck? Write to support@servicepocket.app. You also find the address in **Settings**, under **About and privacy**. Tell us your phone model, the app version shown there, and what you tapped before the problem.

15. Words used in the app

What the words on your screens mean, in plain terms.

Jobs and the schedule

- **Job**: one piece of work for a customer, from the first call until it is finished or cancelled. Each job has a number, such as J-2026-0112.
- **Inquiry**: a job a customer asked about, with no quote yet.
- **Quoted**: a job whose quote you issued, waiting for the customer's answer.
- **Approved**: a job whose quote the customer accepted.
- **Scheduled**: a job with a time booked.
- **In progress**: a job you started, with its work order open.
- **Completed**: a finished job, with its service report.
- **Cancelled**: a job that will not go ahead, with the reason.
- **Customer**: a person or business you work for.
- **Unit or place**: the thing or place you service for a customer, such as the bedroom AC, a 2-bedroom condo, the kitchen sink or the family car.
- **Working hours**: the hours your shop is open. New appointments start inside them, but nothing is blocked.
- **Day off**: a date your shop or one person does not work. Holidays come from the official list; you add your own days.
- **Follow-up**: a date to get in touch with a customer again, such as the next aircon cleaning.
- **Next service date**: a follow-up you set on the work order. It prints on the service report.
- **Service plan**: a set of visits for a regular customer, such as cleaning every 3 months. Each visit is a normal job. Part of Pro.

Quotes, work and reports

- **Quote**: what you will do and what it costs, before you start. It is an estimate, not an invoice. Its number matches the job: Q-2026-0112.
- **Draft**: a quote you are still working on. Only the preview shows DRAFT.
- **Issue**: fix a quote so it never changes, ready to share.
- **Revise**: make a new version of an issued quote, such as Q-2026-0112-R2. The older one stays in history.

- **Void**: withdraw a quote made by mistake. It stays in history, marked VOID.
- **Expired**: a quote past its valid-until date. The customer can still accept it.
- **Optional line**: a line on a quote the customer may take or leave.
- **Custom line**: a line typed on one quote only, not taken from the catalog.
- **Deposit**: part of the price you ask for before the work, printed on the quote. You record it as a payment when it comes in.
- **Work order**: the job's on-site record: checklist, photos, items used, labor and notes. It opens when you start the job.
- **Checklist**: the steps to answer on a work order: Yes, No or N/A. A required step you skip needs a reason.
- **Job timer**: a stopwatch on the work order that fills in the labor hours.
- **Service report**: the PDF you give the customer when a job is finished, numbered like the job: SR-2026-0112. It shows no prices, and it is not an official receipt.
- **Correction**: a new version of a finished job's report, such as SR-2026-0112-R2, with what changed on top.

Catalog

- **Catalog**: everything your shop offers, with your own prices.
- **Business type**: a trade your shop works in, such as aircon service or car detailing. Each one suggests services to start your catalog.
- **Service**: work you do, such as AC cleaning, split type.
- **Product**: something you sell to the customer, such as a remote control.
- **Material**: supplies used on jobs, such as cleaning chemicals or wire.
- **Choice**: one version of an item with its own price, such as 1.0 HP and 1.5 HP, or sedan and SUV.
- **Package**: several items sold together at one price.
- **Cost only**: a material counted in your own costs but never charged, and never on the quote or report.
- **Archived**: hidden from your lists and pickers, but kept in your history. You can bring it back.

Money

- **Charge**: what the customer pays for a job. It starts from the accepted quote's total. Changing it needs a reason, and the old amount stays in the job's history.

- **Payment**: money you record as received, by cash, GCash, Maya, bank transfer or another way. It is your own record, not checked with a bank.
- **Reversal**: how a wrong payment is undone. Payments are never edited or deleted, so the history always adds up.
- **Not paid**, **Partly paid**, **Paid**: how much of the charge you have recorded as received.
- **Still to collect**: what customers still owe for finished jobs.
- **Statement**: one PDF listing what a customer still owes across their jobs.
- **Receipt**: a GCash, Maya or bank receipt you share to ServicePocket to record a payment.
- **Direct costs**: the materials, labor and other costs of a job.
- **Labor**: hours worked times your cost per hour.
- **Estimated direct margin**: the charge less the direct costs. It shows only when the costs are known; a missing cost is never counted as zero.

Texts

- **Texts to send**: messages the app writes for you to send from your own phone, on your own load.
- **Texts sent for you**: messages ServicePocket sends on time by itself, even when your phone is off. You buy them ahead, and paid plans include some each month.
- **OK to send texts**: the customer's yes to getting texts. Without it, the app does not offer to text them.

Team, data and plans

- **Owner**: the one person who runs the shop in the app, with everything, costs and reports included.
- **Manager**: runs the office and the schedule. Sees costs and reports only if the owner allows.
- **Technician**: does the field work on the jobs assigned to them. Never sees costs or reports.
- **Personnel**: the people in your shop besides you. Plans count personnel; you are never counted.
- **Invite code**: the code a new member uses to join your team. It works once, for 7 days, with one phone number.
- **Approvals**: requests from technicians waiting for the owner or a manager, oldest first.

- **Ask the office**: how a technician asks to move a visit, give a discount, change a charge, reverse a payment or correct a report.
- **Sync**: how team phones send and get changes. It happens by itself whenever there is signal.
- **Set aside**: changes from a phone that left the team. Nothing reaches the shop until the owner adds it.
- **App lock**: a fingerprint, face or screen lock asked for when ServicePocket opens.
- **Protected backup**: one file with your whole shop, locked with your passphrase. Its name ends in .spbackup.
- **Passphrase**: the words that lock and unlock a protected backup. Nobody can open the backup without it.
- **Online backup**: a copy of your shop kept on ServicePocket's server, so it comes back when you sign in on a new phone. Part of Pro.
- **Daily check-in**: the small daily count of how much the app was used, with no customer details.
- **Free trial**: 30 days of everything in Pro Team, offered after your 10th finished job.
- **Founding 100**: Pro Team free for 2 years, for the first 100 shops after the launch that reach the goal by real use.
- **Make it yours**: the checklist on Home of things that make the app fit your shop, such as your logo and prices.