

# Quickstart guide

Making the most of your Magnetize **free trial**



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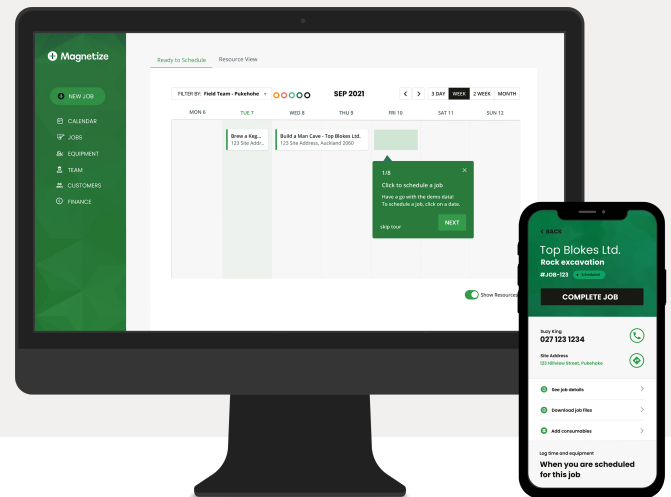
021 931 974

## So simple, you don't actually need this guide to get started!

That said, to help you get the most out of your free trial, there are some features that we'd like to show you.

Give us a call when you're done.

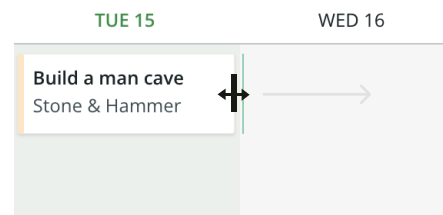
Let's go! — *Scott & Paul.*



### 1 Have a go with the demo jobs!

When you first jump into Magnetize, you'll see some demo jobs scheduled on the calendar. Have a play and get a feel for it.

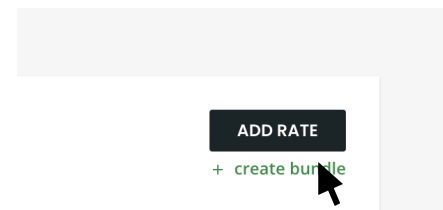
TIP: You can reschedule or extend jobs across multiple days by clicking a dragging the job cards.



### 2 Add your own job info

Have a go at adding your own rates, equipment and staff.

NOTE: if you come onboard with Magnetize, we can bulk-import your data into Magnetize for you to save you time!



#### Add a rate

Go to "Finance" and add a rate that you normally charge out for (e.g. Digger Day rate). You can even bundle rates together.



#### Add an item of equipment

Perhaps a truck, excavator or rig from your fleet.



#### Add another team member

How about someone who also manages jobs and financials? Add them as a full access user too, and they'll get an email to log in. There's no limit to the number of users, while you're on a free trial.

### 3 Create, quote and schedule a job

Ready to see how jobs work? Magnetize is built so you can create, quote and schedule a new job in literally a few seconds.



#### Add a new job

Click "NEW JOB" to create a new job. Have a go at adding a customer, job contact and site address.

#### Quote it (optional)

Select items from your ratebook to quote in seconds. You can also change it to an estimate. Send the quote to your own email address to see what your customer will see. Go ahead and "approve" it.

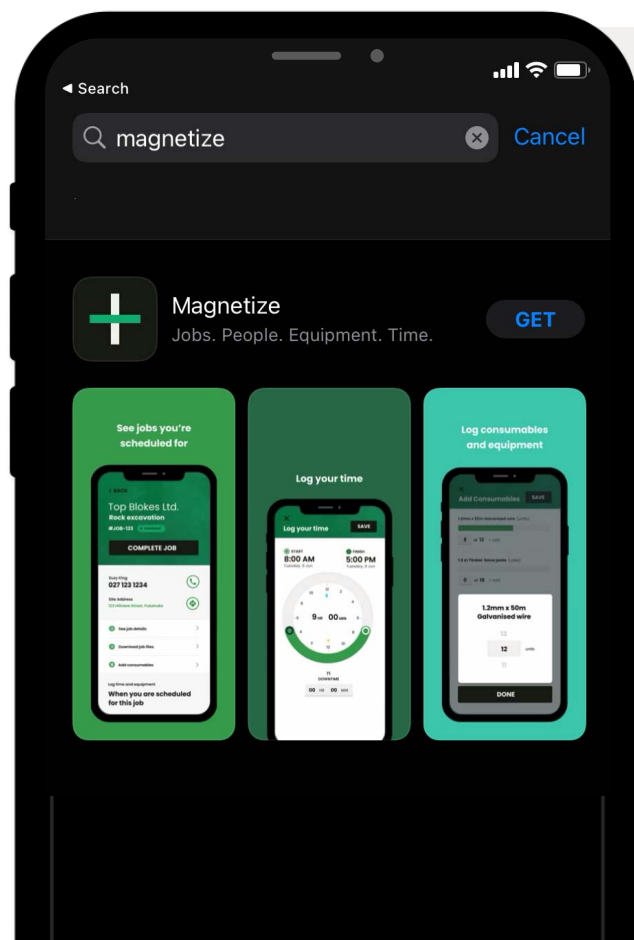
#### Schedule it

When you're ready to schedule, jump over to the "Schedule" tab and schedule it for your team and equipment.

TIP: Schedule it to yourself for the next step in the mobile app..

### 4 Download the mobile app

Now jump over to the App Store (Apple) or Play Store (Andriod), search for "Magnetize" and download the Magnetize app. Sign in using the same email address and password. The app also works on tablets/iPad.



#### Magnetize™ MOBILE APP

Built so your staff can see all:

- jobs assigned
- all job info

Staff will use the app to log:

- time
- equipment hours
- consumables used
- files, notes and photos

## 5 Log the mahi

### Add your time

On the job details screen, scroll down to the scheduled dates and add your time on the job for each day. You'll also see team mates' time logged.

### Equipment time

Add equipment used, and the hours.

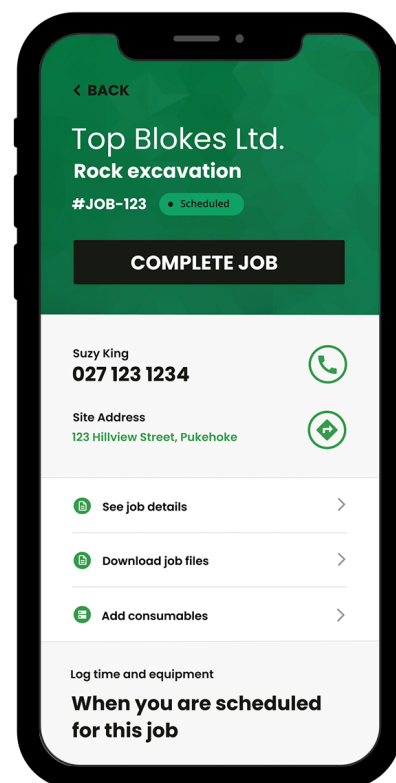
### Consumables

See consumables quoted with the job, and add quantities used to the total.

### Notes and photos

Add notes and photos to the job's timeline.

When you're done, hit the button **"COMPLETE JOB"**



## 6 Close and invoice it!

• complete

### Create the invoice

Back at your computer, the job will now show as "complete". In the logs tab, you can give it a once over to check the logs are correct. Then create the invoice in a few clicks by reconciling what was quoted vs actuals.

### Time logs for payroll

To export all time log data, jump over to 👤 TEAM -> "time logs"

### Give us a call

We're keen to hear how you got on,  
and are here to answer any questions.



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