

Your First Steps in FieldTracker Pro

Add a job · Log work · Invoice clients · Back up your data

STEP 1

Add a New Job

A Job is the foundation — it holds all your work entries, photos, expenses, and invoices for one client or project.

- Tap the Jobs tab at the bottom of the screen.
- Tap the + button in the top-right corner.
- Enter the Client Name, Job Description, and optionally a PO Number.
- Tap Save. Your new job appears in the Jobs list.

Tip: Give your job a clear, recognizable name — you'll reference it when logging mileage and work entries.

STEP 2

Log Your First Work Entry

Work entries track the labor performed on a job — the work type, quantity, and rate that appear on your invoice.

- Tap the job to open its Job Detail screen.
- Tap the Work Log tab, then tap Log Work Today.
- Select the Work Type (or create one in Settings), enter the Quantity, and confirm the Rate.
- Add a note if needed, then tap Save.

Tip: Set up your most-used Work Types once in Settings → Work Types so they're always ready to select.

STEP 3

Send an Invoice

FieldTracker generates a professional invoice from your uninvoiced work entries in seconds.

- Open the Job Detail screen and tap the Work Log tab.
- Tap the Invoice button (appears when you have logged work entries).
- Review the line items, adjust the invoice number and due date if needed.
- Tap Email to open a pre-filled email, or tap PDF to share as a file.
- Entries are automatically marked as Invoiced after you send.

Tip: Only uninvoiced entries appear in the invoice — already-billed work is filtered out automatically.

STEP 4

Back Up & Restore Your Data

Your data lives entirely on your device — no cloud account needed. Use Backup & Restore to protect your data and move it between your iPhone and iPad.

- Go to Settings (gear icon at the bottom of the screen).
- Tap Export Backup — the iOS share sheet will appear.
- Choose Save to Files to store in iCloud Drive, or AirDrop to send directly to another device.
- To restore on another device: open FieldTracker, go to Settings, tap Restore from Backup.
- Select the .json backup file from Files → Downloads (or wherever you saved it).
- Tap Confirm — your jobs, entries, and work types will be restored.

Tip: Back up before updating the app or switching phones. AirDrop is the fastest way to move data from iPhone to iPad.

What else can I do?	A few more features worth exploring:
Mileage Tracking	Log trips from the Mileage tab and link them to a job for IRS records (72.5¢/mile). Set your country in Settings for the correct local rate.
Photo Annotation	Tap any job photo to annotate it with drawings and text before sharing with clients.
Expense Tracking	Add job expenses from Job Detail — they roll into your invoice total automatically.
Job Status	Mark jobs Active or Completed from the Jobs screen to keep your list organized.
Country & Mileage Rate	Go to Settings → Country & Mileage Rate to set the correct deduction rate for your region.