



Using Your Fergus Assistant 101

What it can do and how to use it across your day.

Meet your Fergus Assistant

Think of Fergus Assistant as an extra pair of hands for getting work done. Say or type what you need in plain English, and it turns everyday requests into action while you stay in control.

WHAT IT CAN DO FOR



Create and update

Tell it what needs doing and Fergus Assistant turns requests into action.

WHAT IT CAN DO FOR YOU

- Create and update jobs and sites
- Update the schedule: Book, reschedule or cancel visits and assign staff.
- Build and manage quotes. Add sections, line items, favourites, check margins.
- Manage invoices: Check, create & send invoices, & record payments.
- Everyday admin: Add costs, tasks and notes, and draft descriptions or messages.

WHY IT'S HELPS

Tell it what needs doing and Fergus Assistant handles the admin without jumping between screens in Fergus.

WHAT IT CAN DO FOR



Find and understand

See what's happening across the business abd jobs.

WHAT IT CAN FIND AND SHOW

- Jobs, customers, contact details and sites
- Job & customer history, progress & costs
- Schedules, available staff & unassigned jobs
- Quotes and invoices that need attention
- Timesheets, missing entries, tasks & notes
- Job costing, labour, sales, margin and customer reports

WHY IT'S HELPS

Get answers and see what needs attention without digging through individual jobs, screens or reports.

Use both across the day

Capture updates in Fergus Go, then review jobs, invoices and reports back at your desk.

BEFORE THE DAY STARTS

Open Fergus Assistant and ask, "What needs my attention today?"

ON SITE

Use the assistant to log your time and add a job note by voice.

BACK AT THE DESK

Use Fergus Assistant to check jobs that are ready to invoice and prepare the next steps.

You're still in charge. Fergus Assistant helps with the admin. It doesn't replace your judgement. Check important details before approving or sending anything, especially customer messages, quotes and invoices.