

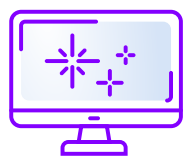


Getting started with Fergus AI

A new way to work across jobs, admin and reporting.

What is Fergus AI?

Fergus AI works like an AI employee across your jobs, admin and reporting. Bringing forward what needs attention and lining up the next step for you to review.



Start here: Create a job then build and send a quote

1 Create the job

ASK FERGUS

“Create a job with a quote for a hot water install at 123 Sesame Street, Auckland.”

Fergus AI drafts the job and asks who it’s for. Choose an existing customer.

2 Build the quote

BUILD IT YOUR WAY

Open the quote once the job is created and build it as you normally would.

Use a favourite, your price books or add line items. Try speaking to Fergus to add materials.

3 Get a second pair of eyes

ASK FERGUS

“Review my quote.”

Fergus flags anything worth a look. Use the Fix with Fergus AI buttons, or leave it as it is. It’s your call.

4 Get it ready to send

PUBLISH, THEN ASK FERGUS

“Draft the email for this quote.”

Check it reads right, then send it.

WHY USE FERGUS AI?

Less searching. Clearer next steps.

See what matters, ask questions and keep jobs moving without digging through menus or job cards.

WHEN IS FERGUS AI USEFUL?

- **See what needs your attention**
Find jobs, quotes, invoices or follow-ups that need action in one place.
- **Work across several jobs at once**
View jobs, customers, quotes and invoices together.
- **Keep a job moving**
See where a job is at and prepare the quote, booking, time entry or invoice.
- **Handle detailed admin**
Create, update and review work with the relevant job details in front of you.
- **Ask about your business**
See incoming work, jobs in progress and how the business is tracking.
- **Build and explore reports**
Ask for data in plain English, Fergus AI will turn it into a report or graph.

TIPS FOR BETTER PROMPTS

- **Be specific:** Include the job, customer, address or timeframe.
- **Keep the conversation going:** Add information or ask a follow-up instead of starting again.
- **Take it one step at a time:** Ask, check the result, then give Fergus the next instruction.
- **Check before sending:** Review customer details, prices and messages before anything goes out.