



Getting started with Fergus Assistant

A simpler way to manage jobs, schedules and everyday admin in Fergus.

What Fergus Assistant can do and where to start.

Ask Fergus Assistant in plain English to find information, update jobs and schedules, prepare quotes and invoices, or draft descriptions and messages. You'll check anything important before it happens.



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

1 Create the job

ASK ASTRO
"Create a job with a quote for a heat pump install at 18 King Street, Auckland."

Start from scratch, an enquiry or supplier quote. If more than one customer matches, choose from the shortlist.

2 Build the quote

BUILD IT YOUR WAY
Open the quote once the job is created and get the assistant to build it for you.

Try using your favourites, or attach a PDF or spreadsheet. You can also build the quote as normal.

3 Get a second pair of eyes

ASK FERGUS ASSISTANT
"Review my quote."

Fergus AI will review your quote and flag anything that needs reviewing before you send it.

4 Get it ready to send

PUBLISH, THEN YOUR FERGUS ASSISTANT
"Draft the customer email for this quote. Show me before I send it."

Check or edit the message, send it when you're ready.

WHY USE FERGUS ASSISTANT?

Less searching. More doing.

Find what you need, ask what comes next and keep work moving without digging through menus or job cards.

WHEN IS YOUR FERGUS ASSISTANT USEFUL?

- **Find jobs, customers and sites**
Pull up jobs, contact details and customer sites.
- **View and organise the schedule**
See who's free, what's on and which jobs are unassigned.
- **Create and manage jobs**
Create jobs, update the type, finish them or check costs.
- **Create quotes and invoices**
Build and send a quote, then turn it into an invoice when ready.
- **Handle detailed admin**
Create, update and review work with the relevant job details in front of you.
- **Check timesheets and tasks**
Check time entries, tick off tasks and reply to notes.
- **Ask about the business**
Ask for information in plain English, Fergus 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.