

USER GUIDE

Job Note Optimizer

Write it like a tech. Send it like a report. A guide for techs, team admins and one-person shops.

Zappy AV
Designed by an AV professional, for AV professionals

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> **New here?** Techs start with sections 2 to 4. Team admins read everything. One-person shops read 2 to 4, then 7.

1 Welcome

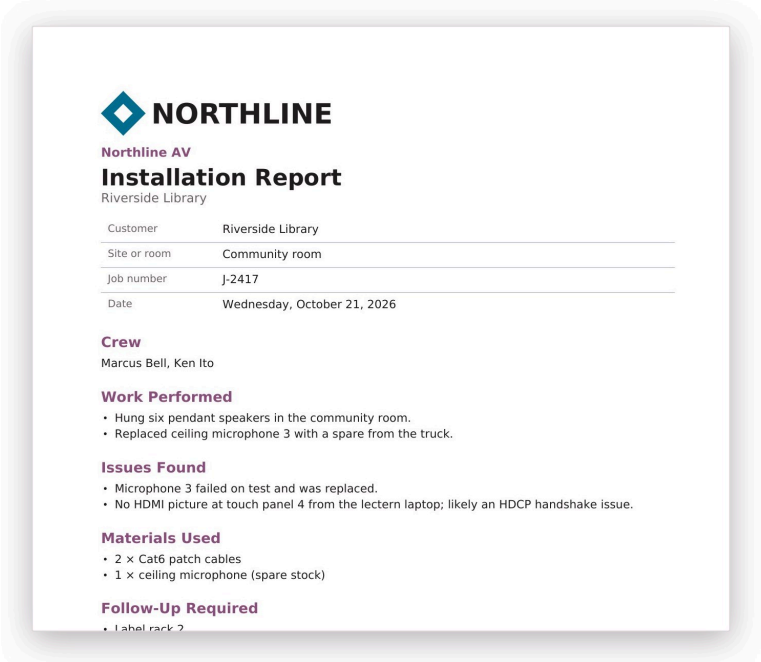
Job Note Optimizer turns the notes you type or dictate on site, at an install or a live show, into a finished report in your company's format. It asks about anything unclear, then gives the office a PDF and a customer-ready email.

Job Notes is one of the apps in **Zappy AV**. You sign in once at **work.zappyav.com** and open Job Notes from there. It works in any phone or computer browser, and there is nothing to download.

Use the part of this guide that fits you:

You are...	Read
A tech or installer on a team	Getting started, then the two "For techs" sections
An org admin (owner, office manager, lead)	Everything, especially "For team admins"
A one-person shop	Getting started, "For techs", then "For solo users"

A note moves through three steps: the tech writes it, the report gets formatted (with AI or without), and an org admin approves it and sends it.



NORTHLINE

Northline AV

Installation Report

Riverside Library

Customer	Riverside Library
Site or room	Community room
Job number	J-2417
Date	Wednesday, October 21, 2026

Crew

Marcus Bell, Ken Ito

Work Performed

- Hung six pendant speakers in the community room.
- Replaced ceiling microphone 3 with a spare from the truck.

Issues Found

- Microphone 3 failed on test and was replaced.
- No HDMI picture at touch panel 4 from the lectern laptop; likely an HDCP handshake issue.

Materials Used

- 2 × Cat6 patch cables
- 1 × ceiling microphone (spare stock)

Follow-Up Required

- Label rack 2

What you end up with: a finished Installation Report as a PDF, with your logo, crew and sections.

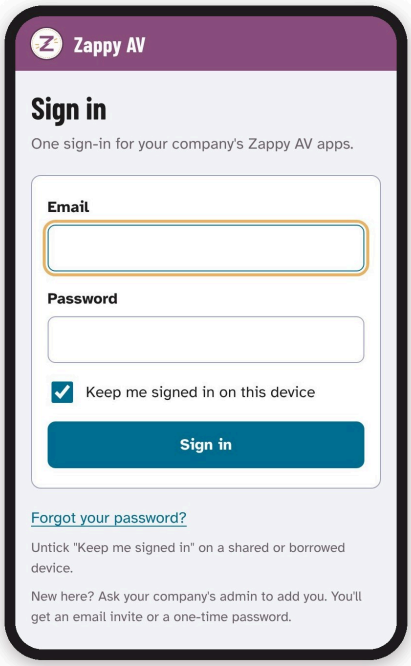
2 Getting started

Your company's team lives in Zappy AV. Your org admin adds you there, and you get either an **email invite** or a **one-time password**.

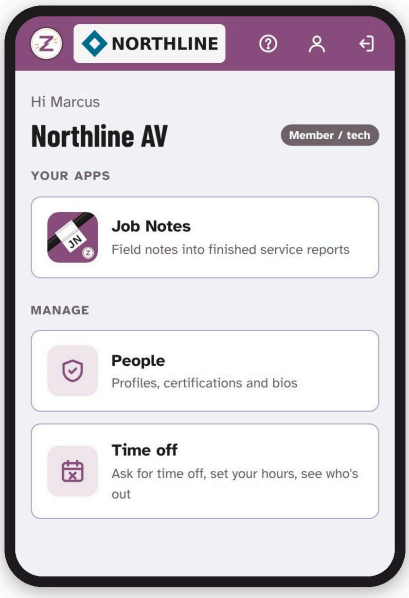
If you got an email invite: tap the link, enter your name and choose a password.

If your admin gave you a one-time password: sign in at work.zappyav.com with your email and that password, then choose your own.

Open Job Notes. After you sign in, your Zappy AV home page shows a tile for each app your company uses. Tap **Job Notes**. You stay signed in to both, and signing out of one signs you out of both.



The Zappy AV sign-in page at work.zappyav.com. The same sign-in opens every app your company uses.



Your Zappy AV home page. Tap **Job Notes** to open it.

Put Zappy AV on your phone's home screen. It then opens like an app, with Job Notes and your other apps inside it.

- iPhone: open work.zappyav.com in Safari, tap **Share**, then **Add to Home Screen**.
- Android: open it in Chrome, tap the menu, then **Add to Home screen** or **Install app**.

Turn on notifications in Job Notes under **Account → Notifications** on each device you use. You'll hear when a note is approved or sent back, and admins hear when a note is waiting. On iPhone, notifications only work after you add the app to your Home Screen (iOS 16.4 or later). Notifications never include what anyone wrote.

Optional: two-step sign-in. In Zappy AV, under **Settings → Two-step sign-in**, you can require a code from an authenticator app each time you sign in.

3 For techs: writing a note on site

Write one note per job per day. A live show counts as a job: use the venue or client as the customer and the show date as the job date. Tap **+ New note** and fill in:

Field	What to put
Customer	Start typing; pick an existing customer so notes stay together
Site or room	Optional, e.g. "Community room"
Job number	Optional, but needed for whole-job reports and job-day comparison
Job date, start and end time	When you were on site. Overnight shifts add up correctly
Lunch	Asked only when your hours cover your company's lunch window
Your work on this job	Shown only if your company uses titles and skills
Crew	Who was with you, each with their own times and lunch (see below)
Photos	Up to 20; take them or pick from your camera roll
Notes	What you did, in your own shorthand

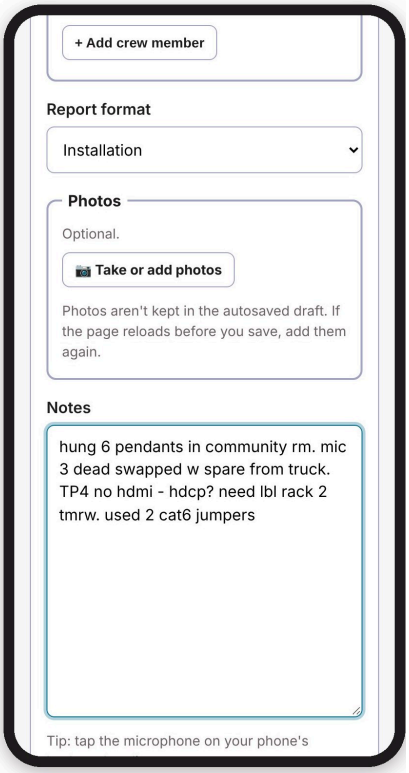
Write the notes the way you'd text them. "hung 6 pendants comm rm. mic 3 dead swapped w spare. TP4 no hdmi - hdcp? need lbl rack 2 tmrw" is fine. To dictate, tap the microphone on your phone's keyboard.

Crew. If you're the lead, tap **+ Add crew member** for each person on site. Pick teammates from the list, or type a name and company for a temp or subcontractor without an account. Each person gets their own start, end and lunch. If your company uses titles and skills, also pick each person's work.

Photos are shrunk on your phone before upload, and location and camera details are removed.

Drafts save on your phone as you type, so a dropped signal or a closed tab doesn't lose your notes. Photos aren't in the autosaved draft, so add them again if the page reloads before you save.

Tap **Save note** when you're done. You can edit it until it's approved.

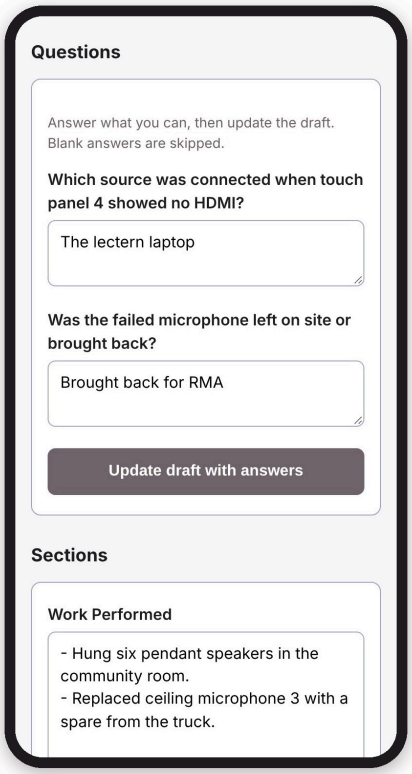


The note form on a phone. Shorthand is fine.

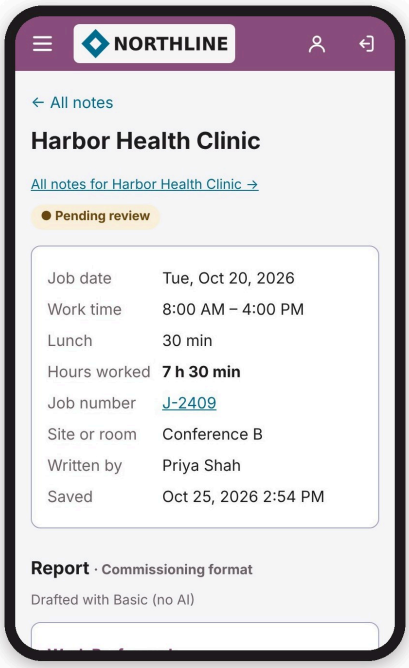
4 For techs: formatting the report and getting it approved

After saving, open the note and tap **Format report**.

1. Tap **Draft the report with …** (the name shows which AI service you're using). It takes up to a minute.
2. Your notes come back sorted into your company's sections (Work Performed, Issues Found, Materials Used, and so on), written in plain, professional wording.
3. If something's unclear, questions appear above the sections. Answer what you can and tap **Update draft with answers**. Blank answers are skipped.
4. Read each section and fix anything the AI got wrong. You know what happened on site; it doesn't.
5. Tap **Save report**.



Answer the AI's questions, then tap **Update draft with answers**.



A saved note shows its status at the top: here, Pending review.

How many questions you get depends on the experience level your admin set for you: New to AV, Beginner, Intermediate or Experienced. New people get more questions, in plain language, with AV terms explained. Experienced techs only get asked when something important is missing.

No AI set up? "Basic (no AI)" is always available. It sorts each sentence into a section by keywords, without rewording anything, and nothing leaves the app.

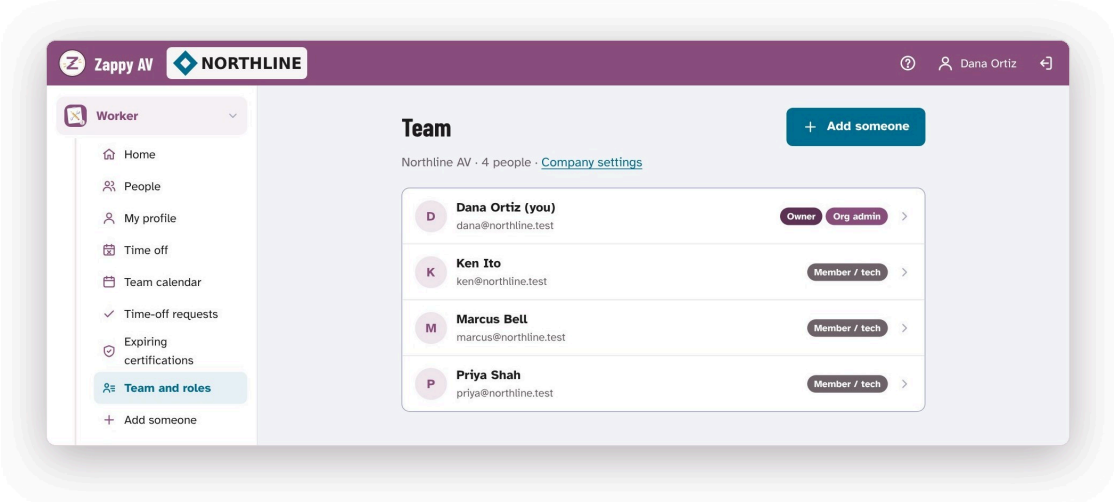
Where your note stands:

Status	What it means	What you do
Pending review	Waiting for an org admin	Nothing; you can still edit it
Changes requested	Sent back with a reason, or reopened after approval	Read the message, edit the note or report, save. It goes back for review
Approved	Done and ready to send to the customer	Nothing; only an approver can change it now

Messages. Each note has a private thread between you and your org admins. Use it to answer a question about the note instead of texting. When the note is approved, the thread is archived with it.

5 For team admins: setting up your organization

Your team is managed in Zappy AV. Add people, set their role (org admin, sales, designer, member/tech or guest), give them a job title and skills, reset sign-ins and turn people off under **Team and roles** in Zappy AV. The first time someone opens Job Notes, they appear on its Members page.

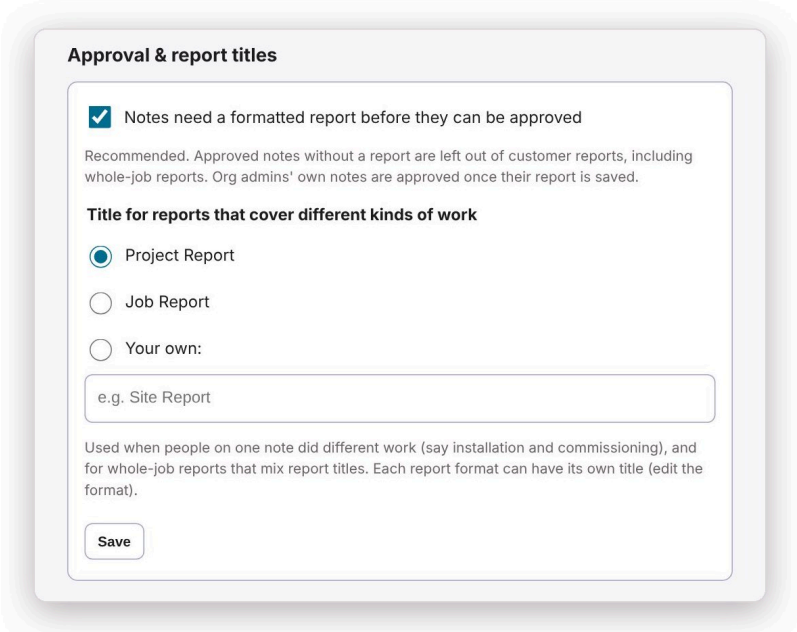


Zappy AV → Team and roles: everyone on the team, with **+ Add someone** at the top.

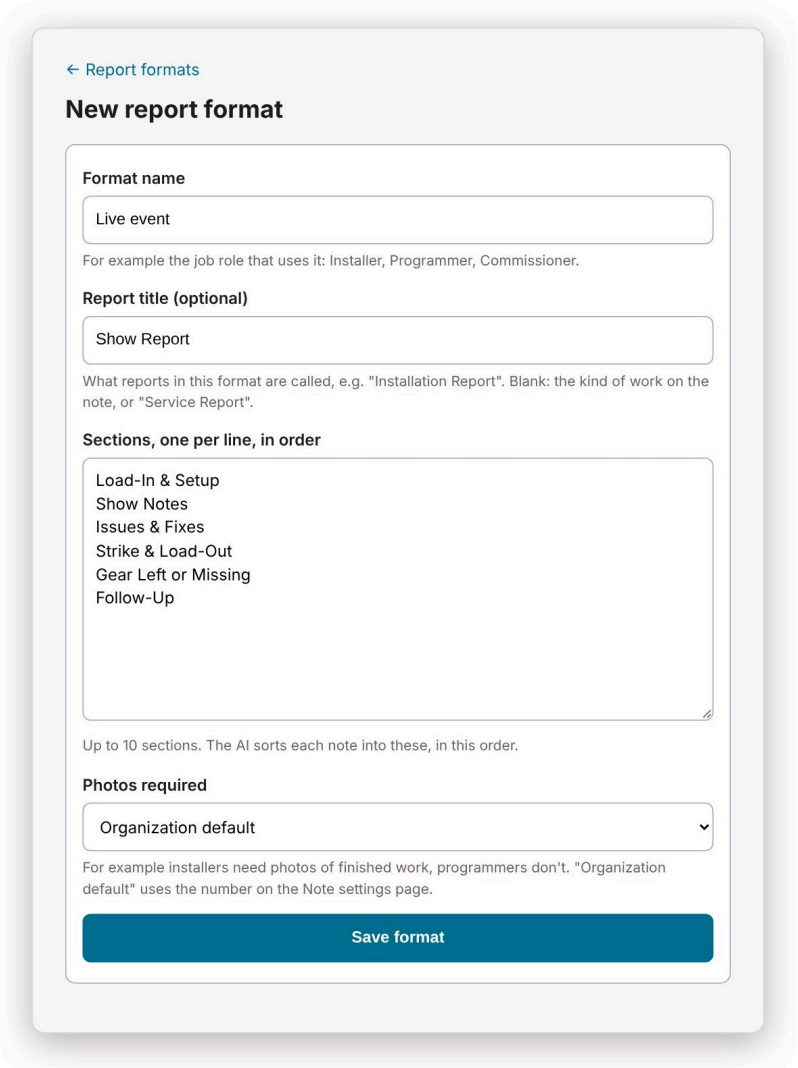
Then set up Job Notes once, in this order, before your team writes its first note. Everything is in the left-hand menu on a computer, or the menu button on a phone.

1. **Note settings → Report formats.** A format is the list of sections a report uses. Start from a ready-made one or from scratch, and give each format a report title ("Installation Report", "Commissioning Report"). Pick a default; assign other formats to people on the Members page.
    - **Doing live events?** Tap **Live event** under "Add a format". It starts as a **Show Report** with Load-In & Setup, Show Notes, Issues & Fixes, Strike & Load-Out, Gear Left or Missing, and Follow-Up. Use it as your default if you mostly do shows, or give it to your live crew only.

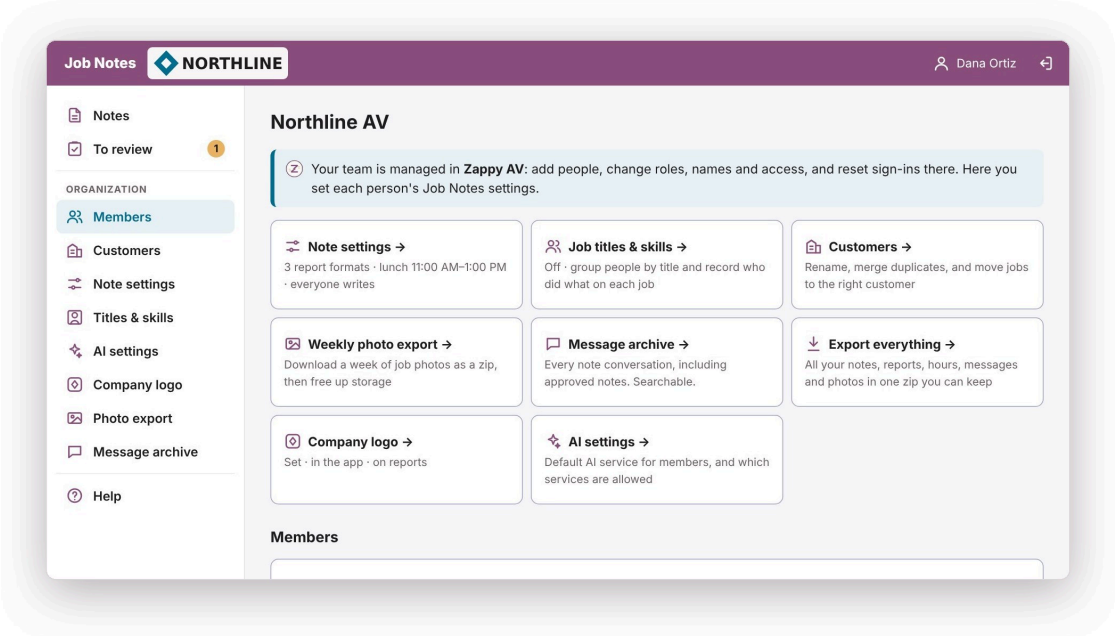
2. **Note settings → everything else:**
    - **Approval & report titles:** keep "needs a formatted report before approval" on, so no blank report reaches a customer. Choose the title for mixed work: Project Report, Job Report or your own.
    - **Photos:** how many each note needs (0 = optional).
    - **Lunch:** your lunch window and usual length. Techs are only asked about lunch when their hours cover it.
    - **Crews:** "Everyone writes their own note" or "The lead writes one note for the crew". Turn on job-day comparison if every note has a job number.
3. **AI settings.** Choose which AI services your team may use, and optionally add one organization key so nobody needs their own. Set the default number of questions. Keys are stored encrypted and never shown again. Usage is billed to the key's account.
4. **Company logo.** Upload a wide PNG with a transparent background. Choose whether it shows in the app, on PDFs and in the customer email.
5. **Titles & skills** (optional). Turn it on if one job can mix kinds of work, like installing and programming. The lists, and each person's title and skills, come from Zappy AV (Company settings and each person's profile). Reports then get a section per kind of work.
6. **Members.** For each person, set their **experience level** (how many questions the AI asks them), **report format**, whether they **can see the team's approved notes**, and their **worker type**. Temps and subcontractors can be limited to certain job numbers.



Note settings → Approval & report titles.



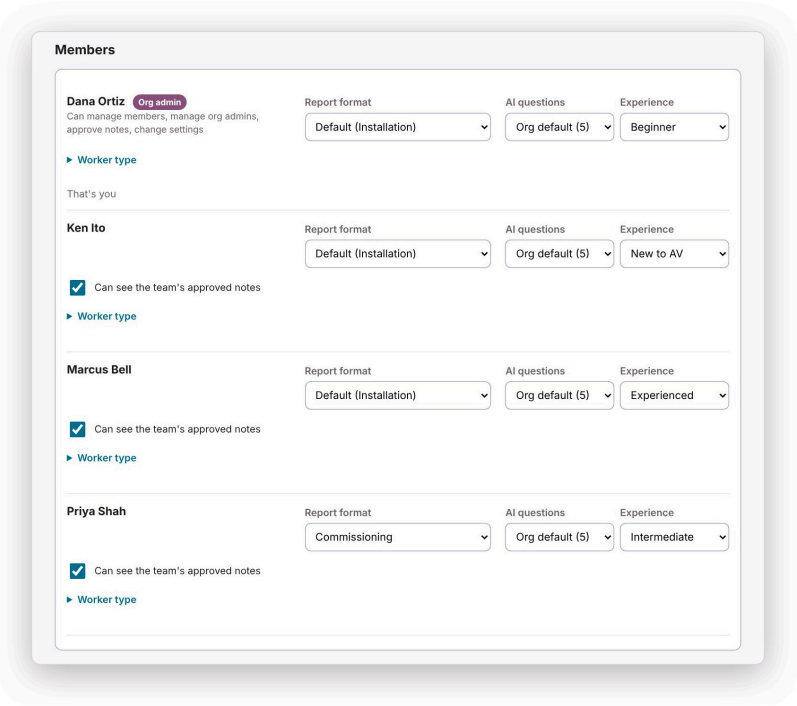
The **Live event** format: a Show Report with sections for load-in, the show, issues, strike and gear.



The Members page: settings shortcuts, and a reminder that the team itself is managed in Zappy AV.

Permissions for other admins. Every org admin can see all notes and members. What they can change is up to you. Most switches are set in Zappy AV on each person's page; approving notes is set here on the Members page:

Permission	Where	Lets them
Manage team	Zappy AV	Add people, change their details, turn them off; in Job Notes, edit members' settings
Manage org admins	Zappy AV	Make or remove org admins and set their permissions
Company settings	Zappy AV	Company details, titles and skills; in Job Notes, note settings, AI, logo and customers
Approve notes	Job Notes	Approve notes, send them back, reopen approved ones

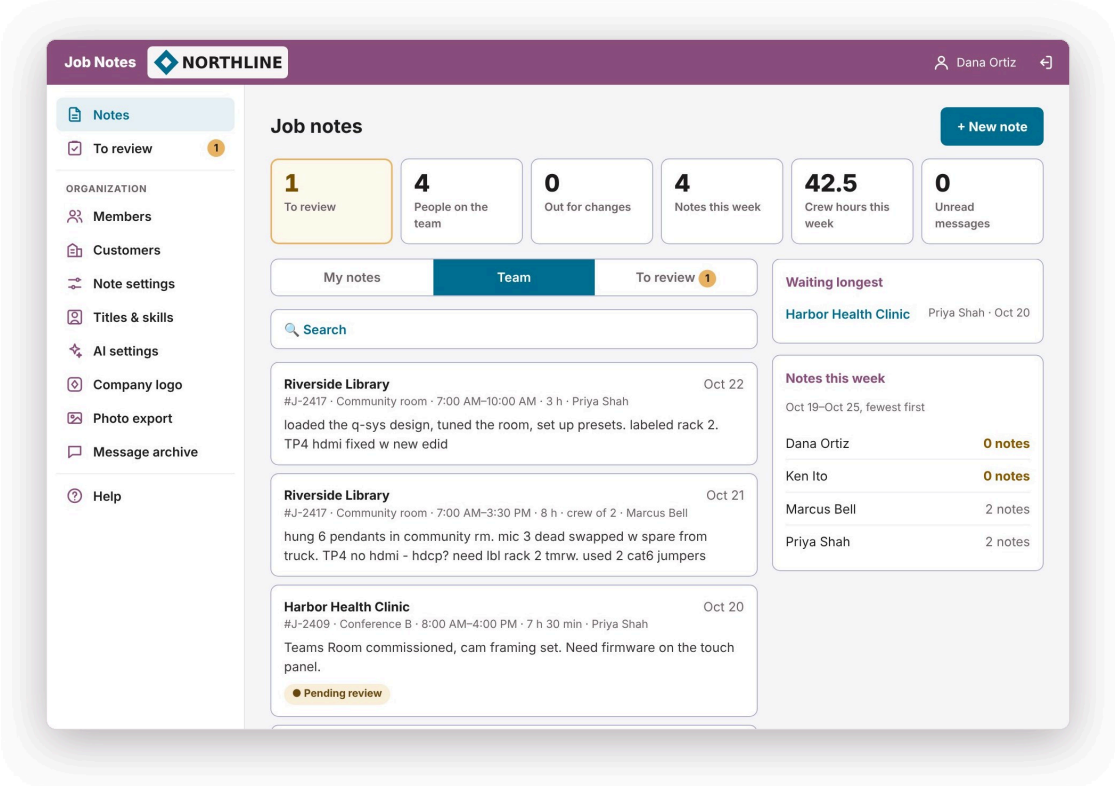


Each person's report format, AI questions, experience level and team-notes access.

The company owner always has every permission. Nobody can change their own permissions.

6 For team admins: reviewing and sending reports

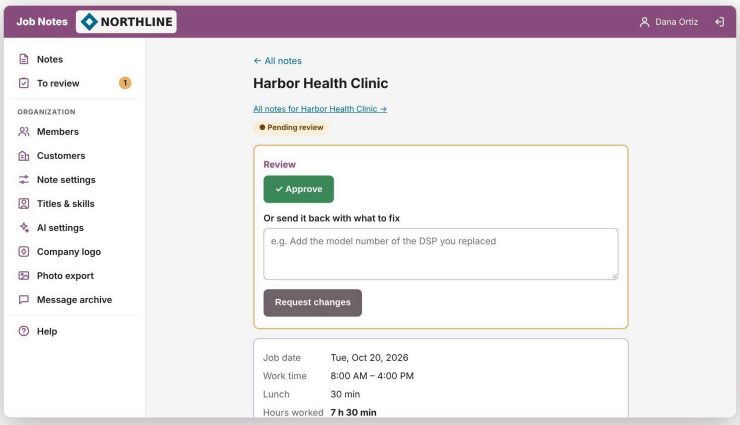
Start at the dashboard. The tiles across the top show notes to review, people on the team, notes out for changes, notes and crew hours this week, and unread messages. On the right, "Waiting longest" is the oldest note in the queue, and "Notes this week" lists people with the fewest notes first, so you can see who hasn't written one.



The dashboard on a computer: what needs attention this week.

Review a note. Open the **To review** tab and pick a note. Check the report against the tech's original notes, which sit below it. Then either:

- **Approve** it, or
- write what needs fixing and tap **Request changes**. It goes back to the tech with your reason, starts the note's message thread, and notifies them.



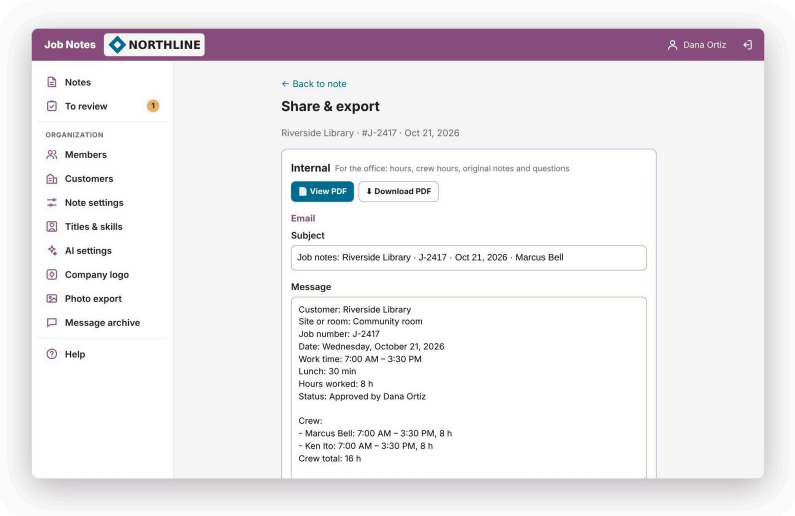
Reviewing a note: **Approve**, or write what to fix and tap **Request changes**.

Your own notes as an approver are approved as soon as you save their report.

Approved one by mistake? Open it, tap **Reopen for edits** and give a reason. It goes back to the tech as "Changes requested" and drops out of every report until it's approved again.

Send a single note's report. On an approved, formatted note, tap **Share & export**:

Version	What's in it	Use it for
Customer	Report sections, crew, photos, your logo	Sending to the customer
Internal (title ends in "(Internal)")	All of that, plus everyone's hours and the tech's original notes	Your records, billing, the PM



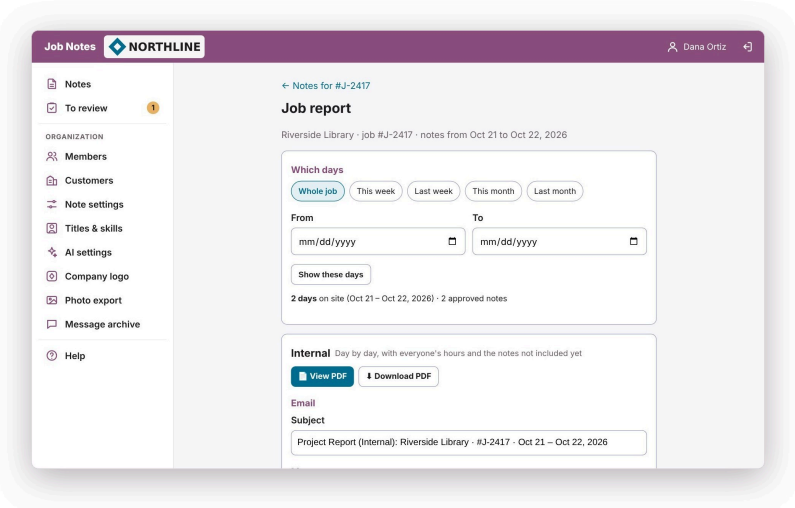
Share & export: PDFs and a ready-to-paste email for each version.

For each version you can view or download the PDF, or copy the email. **Copy with logo** pastes your logo at the top in Gmail, Outlook or Apple Mail; paste the subject separately and attach the PDF, since photos are in the PDF, not the email.

Report titles follow the work: a note using the Installation format is an "Installation Report". When the people on one note did different kinds of work, it uses your mixed-work title, such as "Project Report".

Whole-job report. On any note with a job number, tap **Whole job report**. It puts every approved note on that job number in one report, day by day, never merged. Pick the whole job, a quick range or your own dates.

- The customer version only includes approved notes that have a formatted report.
- The internal version adds everyone's hours and totals, lists notes not included yet (and why), and flags anyone on two notes the same day, whose hours may be counted twice.



The whole-job report: pick the days, then send the customer or internal version.

Other tools:

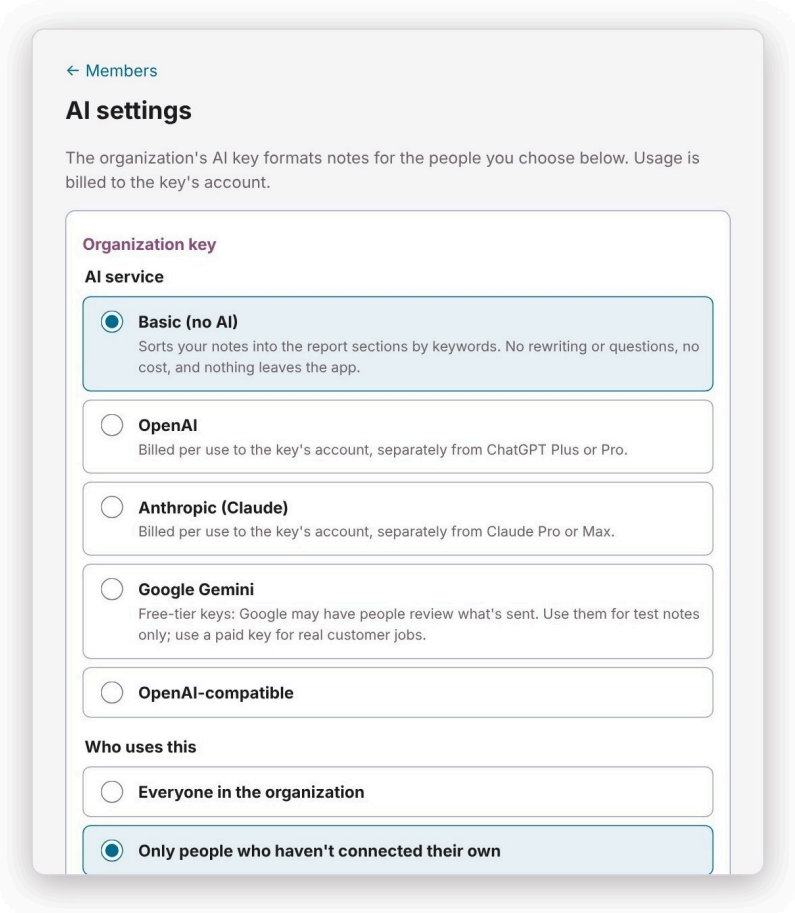
- **Customers:** rename, merge duplicates ("Acme" and "Acme Corp"), or move a job to the right customer.
- **Job-day comparison** (if turned on): open it from any note with a job number. It shows every note and everyone's hours on that job for the day, with mismatches over 15 minutes flagged.
- **Photo export:** a weekly zip with a folder per job. After downloading, you can clear that week's full-size photos from storage; notes keep small previews.
- **Message archive:** every note's message thread, for the record.
- **Export everything** (admins who can change settings): one zip with every note, report PDFs, hours, messages and photos, in files that open without the app.

7 For solo users

A one-person shop, or a freelance tech who works installs and shows, is a company of one, with you as its owner. Use "Request early access" at zappyav.com/job-notes and we'll set up your Zappy AV company. You get every permission, so you write, approve and send your own reports.

Set up in about 15 minutes:

1. **Note settings:** pick or build the report format you use most, and set its report title. Set your usual lunch window and length.
2. **AI settings:** add your own AI key (OpenAI, Anthropic, Google Gemini or a compatible service), or use Basic (no AI).
3. **Members:** set your own experience level. "Experienced" keeps questions to a minimum.
4. **Company logo:** upload it so your PDFs and emails look like your business.



AI settings: pick a service and add your key, or use Basic (no AI).

Your day-to-day: write the note on site, tap **Format report**, check it and save. Your note is approved as soon as the report is saved. Then use **Share & export** to send the customer PDF and email. At the end of a multi-day job, send the **Whole job report**.

What you can skip: crews, permissions, job-day comparison and the review queue. Titles and skills only help if you list helpers on your notes.

Bringing on help? List a temp or subcontractor as crew by name; they don't need an account. When you hire someone, add them in Zappy AV under **Team and roles → Add someone**. Everything in "For team admins" then applies.

8 Tips, privacy and troubleshooting

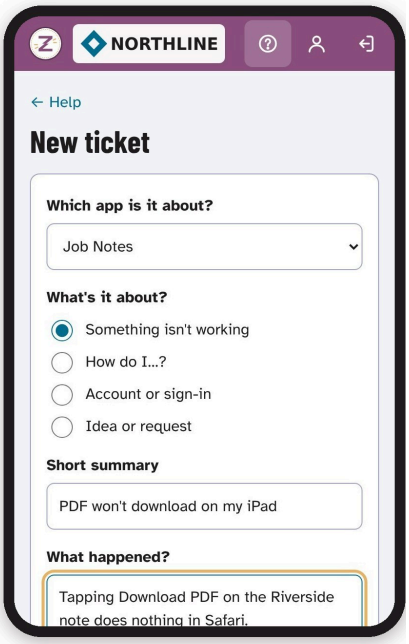
Tips for better reports

- Write the note the same day, while you remember part numbers and room names.
- Put a job number on every note. Whole-job reports and job-day comparison depend on it.
- Say what's left to do ("need lbl rack 2 tmrw"). It lands in Follow-up, and the next tech knows where to start.
- Answer the AI's questions even briefly. One-word answers still beat a guess.

Your data

- AI runs on your company's or your own AI account, or not at all with Basic. Keys are stored encrypted and never shown again.
- Zappy AV's admin console shows company names and counts, never your notes, photos, messages or exports.
- Photos have location and camera details removed before they're stored.
- Notifications say what happened, never what anyone wrote.

Getting help. Tap **Help** in the Job Notes menu. It opens a support ticket in Zappy AV with Job Notes and the page you were on already filled in. Pick what it's about, describe the problem and attach screenshots if they help. Mark it "This is stopping me from working" if it is. Zappy AV support replies in **Help** (the **?** at the top of Zappy AV), and you get an email when they do. Your org admins can see your tickets and often help first.



Help opens a ticket in Zappy AV, with Job Notes already picked.

If something isn't working

Problem	Try this
No invite email	Check your spam folder, or ask your admin to send the invite again from Zappy AV
No Job Notes tile on your home page	Your company or your role doesn't include Job Notes yet; ask your org admin
"Couldn't format the notes"	Ask your admin to check the AI key under AI settings, or draft with Basic (no AI) for now
No notifications	Turn them on under Account → Notifications on that device; on iPhone, add the app to your Home Screen first
Can't edit an approved note	Ask an approver to reopen it
No PDF or email on Share & export	Format and save the report first
Can't see teammates' notes	Your admin controls whether you can see the team's approved notes
Forgot your password	Tap **Forgot your password?** on the Zappy AV sign-in page

Can't sign in at all? Email **zappyav@gmail.com**.