



Box Off
EVERY JOB, SORTED.

User Guide

Version 1.0

Table of Contents

Welcome to Box Off	1
Setting Up Your Account	2
Understanding the Job Pipeline	4
Adding a Customer	5
Adding a Job	6
Building a Quote	7
Getting Quotes Signed	9
Converting Quotes to Invoices	10
Generating Job Sheets	10
Materials Tracking & Profit Margin	11
Calendar View	11
Tasks & Reminders	12
Getting the Most from Your Customer Record	13
Billing	13
Getting Help	14

Everything you need to run your jobs, quotes and invoices in Box Off.
Built for the van. Not the boardroom.
app.boxoff.co.uk

1. Welcome to Box Off

1. Welcome to Box Off

Box Off is the simple job management app for UK tradespeople. This guide walks you through everything from setting up your account to getting paid — in the order you'll actually use it, job by job. No jargon, no 47-page manual. Just what you need.

What you can do in Box Off:

- Track every job from first enquiry through to done and dusted, on one visual pipeline
- Build professional quotes and get them signed online
- Turn accepted quotes into invoices in one click, and track who's paid
- Keep all your customer details and job history in one place
- Generate job sheets, log materials, and see your profit margin per job

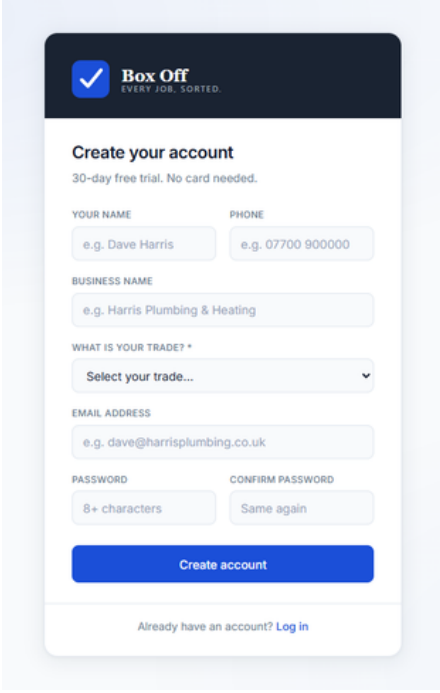
TIP: Every section below follows the natural order of a job — enquiry, quote, schedule, invoice, paid. Read it in order the first time, then jump straight to what you need.

2. Setting Up Your Account

Getting up and running takes minutes — there's no onboarding call and no training course required.

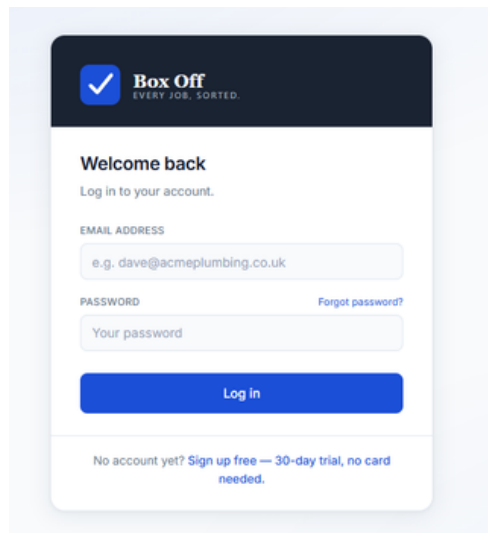
2.1 Signing up

1. Go to app.boxoff.co.uk and select Sign up free.
2. Enter your email address and choose a password.
3. Add your business details — company name, address and contact details.
These appear automatically on your quotes, invoices and job sheets.
4. Your 30-day free trial starts immediately. No card required.

A screenshot of the 'Create your account' form on the Box Off website. The form is titled 'Create your account' with a subtext '30-day free trial. No card needed.' Below the title, there are input fields for 'YOUR NAME' (example: e.g. Dave Harris), 'PHONE' (example: e.g. 07700 900000), 'BUSINESS NAME' (example: e.g. Harris Plumbing & Heating), 'WHAT IS YOUR TRADE? *' (a dropdown menu with 'Select your trade...' as the placeholder), 'EMAIL ADDRESS' (example: e.g. dave@harrisplumbing.co.uk), 'PASSWORD' (with a note '8+ characters'), and 'CONFIRM PASSWORD' (with a note 'Same again'). At the bottom of the form is a blue 'Create account' button. Below the button, there is a link: 'Already have an account? [Log in](#)'.

2.2 Logging in

1. Go to app.boxoff.co.uk/login.
2. Enter your email and password, then select Log in.
3. Forgotten your password? Select Forgot password? and follow the reset link sent to your email.



Box Off
EVERY JOB, SORTED.

Welcome back
Log in to your account.

EMAIL ADDRESS
e.g. dave@acmeplumbing.co.uk

PASSWORD
Your password

[Forgot password?](#)

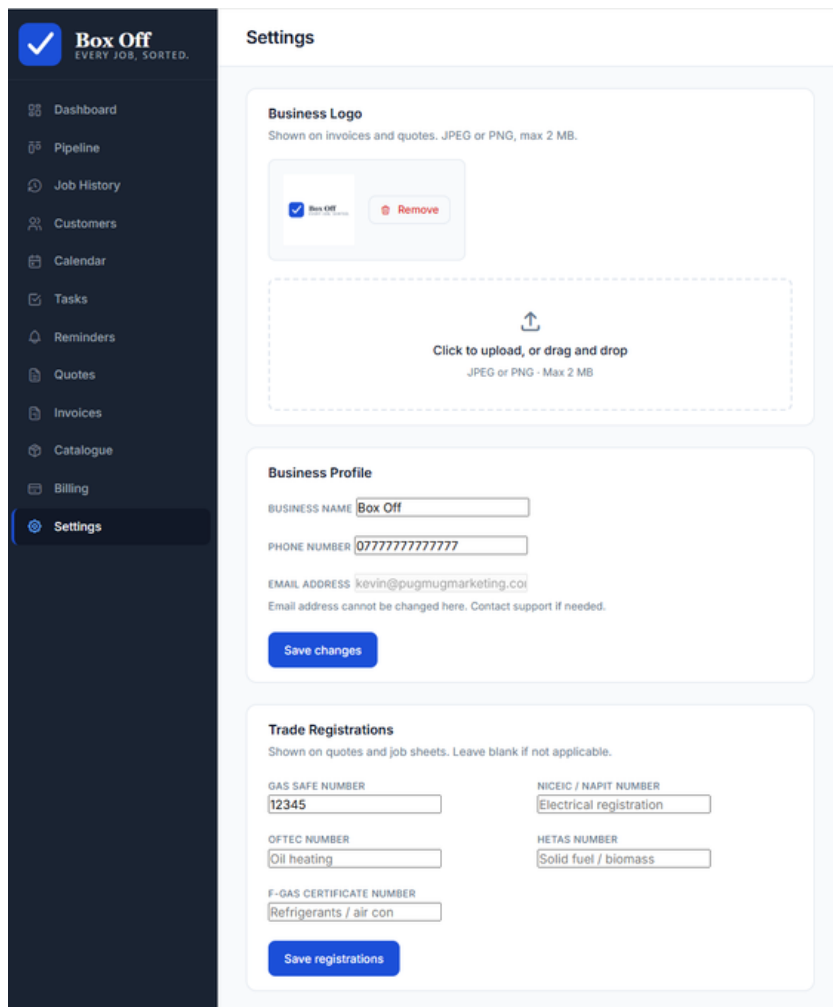
Log in

No account yet? [Sign up free — 30-day trial, no card needed.](#)

2.3 Your company profile

Before your first quote goes out, it's worth setting up your company profile properly — this is what your customers see on every document.

- Add your logo — it appears on quotes, invoices and job sheets
- Check your business address and contact number are correct
- Set your default payment terms



Box Off
EVERY JOB, SORTED.

Settings

Business Logo
Shown on invoices and quotes. JPEG or PNG, max 2 MB.

 [Remove](#)


Click to upload, or drag and drop
JPEG or PNG - Max 2 MB

Business Profile

BUSINESS NAME

PHONE NUMBER

EMAIL ADDRESS
Email address cannot be changed here. Contact support if needed.

Save changes

Trade Registrations
Shown on quotes and job sheets. Leave blank if not applicable.

GAS SAFE NUMBER 12345	NICEIC / NAPIT NUMBER Electrical registration
OFTEC NUMBER Oil heating	HETAS NUMBER Solid fuel / biomass
F-GAS CERTIFICATE NUMBER Refrigerants / air con	

Save registrations

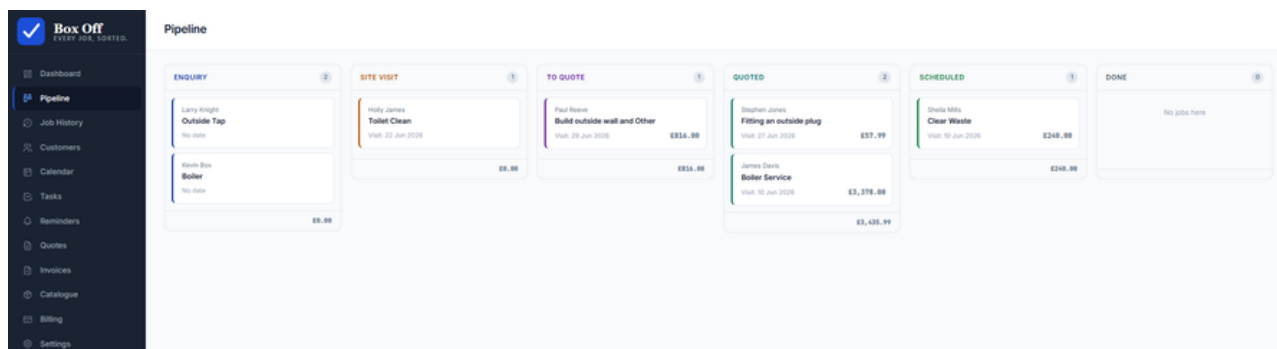
3. Understanding the Job Pipeline

The Job Pipeline is your home screen — your whole business on one screen. It's a visual kanban board showing every job at every stage, so nothing falls through the cracks.

3.1 The six stages

Every job moves through six stages, left to right:

- Enquiry — a new lead has come in
- Site Visit — you've arranged to go and look at the job
- To Quote — you've got what you need and owe them a price
- Quoted — the quote is out, waiting on a decision
- Scheduled — accepted, and booked into the calendar
- Done — job complete



3.2 Moving a job through the pipeline

1. Open the Pipeline from the main menu.
2. Drag a job card from one column to the next as it progresses.
3. Tap a card to open the full job details, customer info, quote and history.

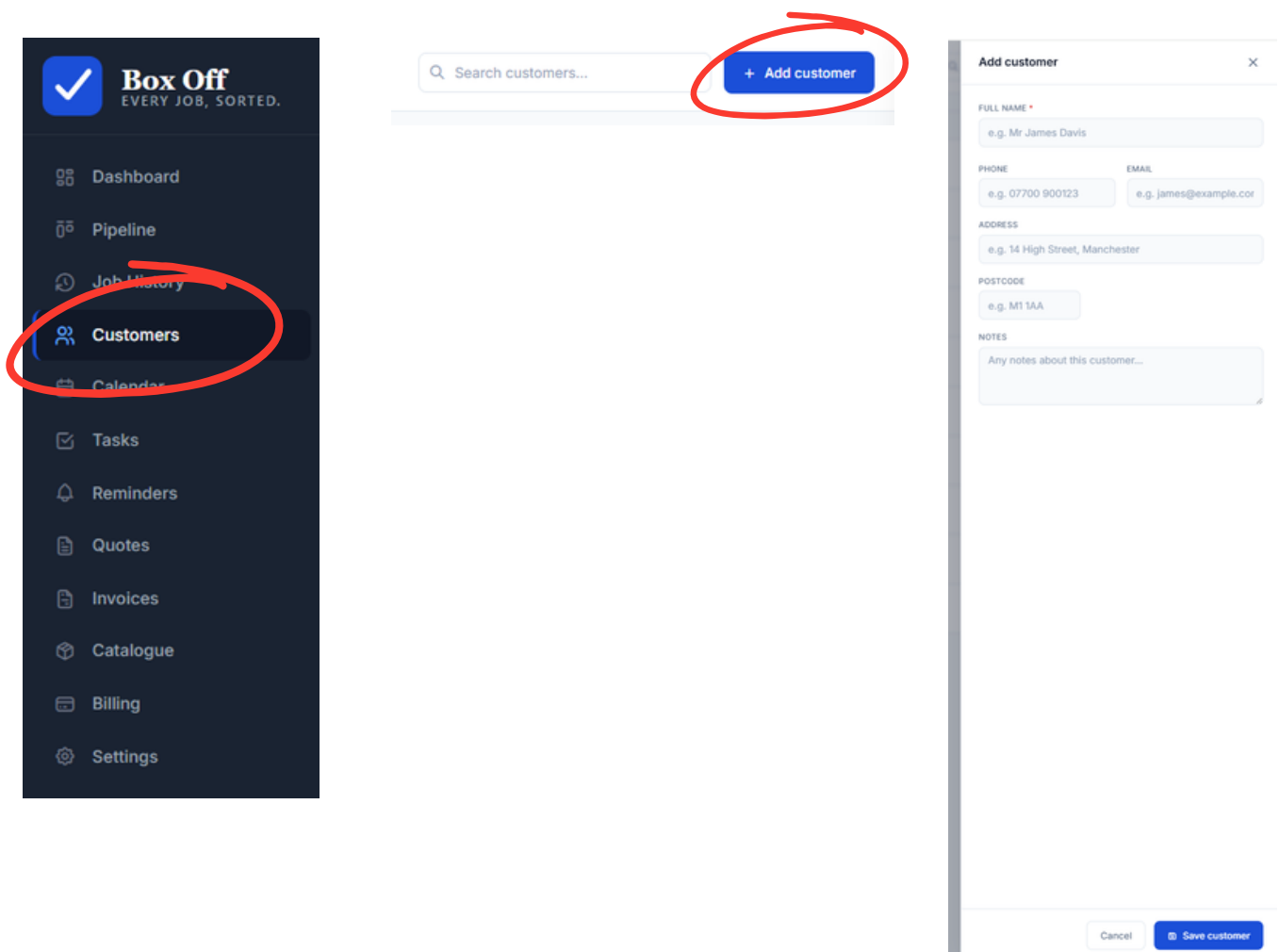
TIP: Works brilliantly on mobile — update jobs from the van between visits, even on rubbish signal.

4. Adding a Customer

Every job needs a customer attached, so it's worth adding new customers as you go – you'll only ever need to type their details in once.

4.1 Creating a new customer

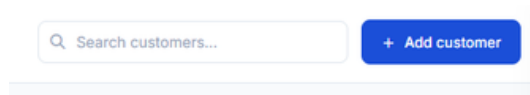
1. Go to Customers in the main menu and select Add Customer.
2. Enter their name, address and contact details.
3. Add any notes worth remembering – access instructions, a dog that hates visitors, that sort of thing.
4. Select Save.



The image shows the Box Off app interface. On the left is a dark sidebar menu with the Box Off logo at the top. The 'Customers' menu item, which includes a person icon, is circled in red. To the right of the sidebar is a light grey header bar containing a search input field labeled 'Search customers...' and a blue button labeled '+ Add customer', which is also circled in red. On the far right is a white 'Add customer' form with a close button (X) in the top right corner. The form contains the following fields: 'FULL NAME' (with a red asterisk), 'PHONE', 'EMAIL', 'ADDRESS', 'POSTCODE', and 'NOTES'. Each field has a placeholder text starting with 'e.g.'. At the bottom of the form are two buttons: 'Cancel' and 'Save customer'.

4.2 Finding a customer

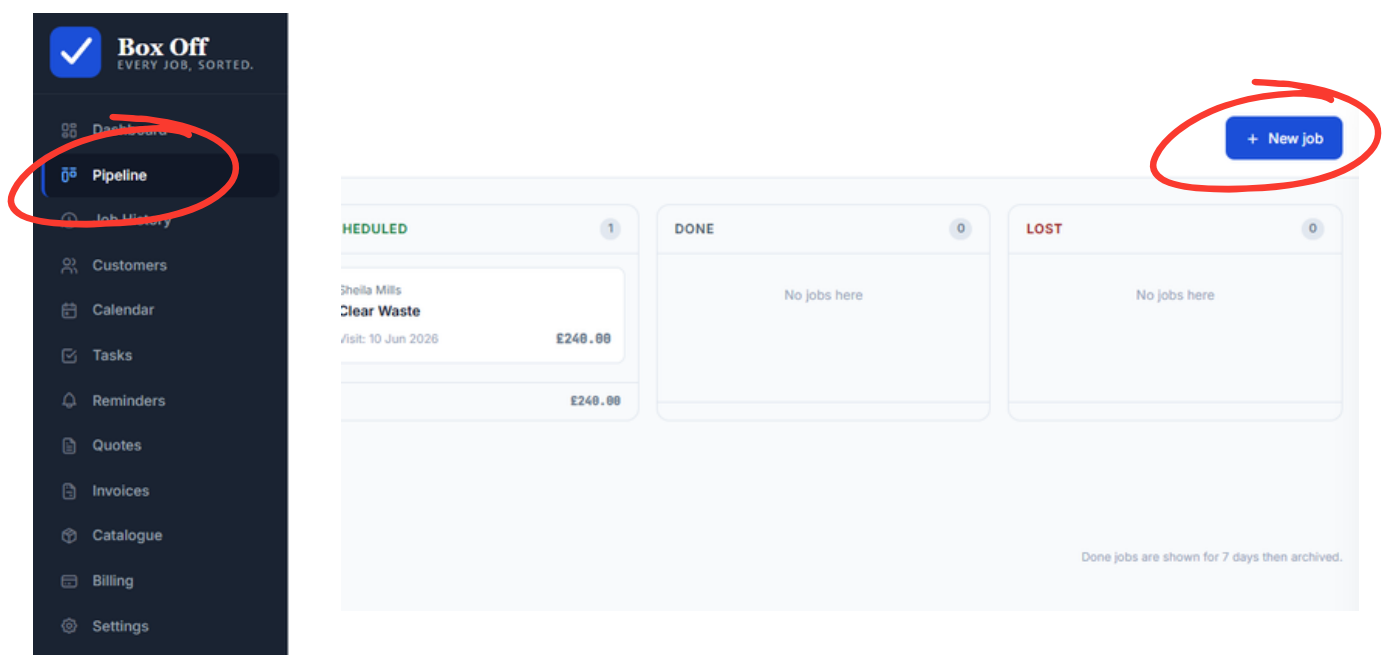
Use the search bar at the top of the Customers list to find anyone in seconds — search by name, address or phone number. Every customer record shows their full job history, plus every quote and invoice linked to their name.



5. Adding a Job

Create a new job in seconds and drop it straight into your pipeline.

1. Select Add Job from the Pipeline or the main menu.
2. Choose an existing customer, or add a new one on the fly.
3. Enter the job details — what the work is, the site address if different from the customer's, and any notes.
4. Choose the starting stage (usually Enquiry).
5. Select Save — the job now appears as a card on your Pipeline.



TIP: The moment a job is in Box Off, it's linked to that customer's history for good — you'll never lose a job card down the side of the van seat again.

6. Building a Quote

Build a professional quote in minutes, not hours. Add labour, materials, and anything else that needs pricing in.

6.1 Creating a quote

1. Open the job and select Create Quote.
2. Add line items for labour and materials, with quantities and prices.
3. Box Off totals everything automatically as you go.
4. Preview the quote before sending.

☒ Box Off

FROM
Pug Mug Marketing
kevin@pugmugmarketing.com
0777777777
1 High Street, A Town
B1 7ZZ
Gas Safe: 12345

TO

Kevin Box
kevin@pugmugmarketing.com
1 High Street, A Town B7 7ZZ
Q-2026-NEW

Line items

Include VAT ☒

DESCRIPTION	QTY	UNIT PRICE	TOTAL	
Labour	1	100.00	£100.00	
Materials	1	90.00	£90.00	

+ Add line

Subtotal£190.00

VAT rate20%

VAT amount£38.00

Grand total£228.00

NOTES

Any notes for the customer...

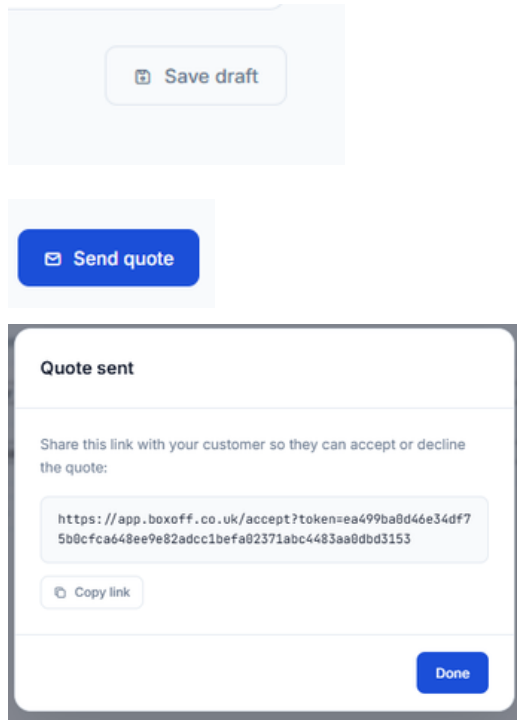
TERMS & CONDITIONS

Payment due within 30 days of completion. Quote valid for 30 days.

Save draft

6.2 Sending a quote

1. Select Save Draft, then click Send Quote.
2. Box Off generates a professional PDF with your logo and the customer's details, and creates a link for online signing.
3. Send the link by email or text — the customer can open and review it on their phone.



Note: If working on pc and you want to send via whatsapp, you can connect your phone to pc at <https://web.whatsapp.com/>

7. Getting Quotes Signed

No more wondering whether they got it, read it, or are just ghosting you.

1. Your customer opens the quote link on their phone or computer.
2. They review the quote and sign it online — no printing, no posting.
3. You get notified the moment it's signed.



Awaiting your response

Q-2026-0016

QUOTE FROM

Pug Mug Marketing
0777777777
kevin@pugmugmarketing.com

PREPARED FOR

FOR

Larry Knight

Outside Tap

DESCRIPTION	QTY	PRICE	TOTAL
Labour	1.00	£250.00	£250.00
Materials	1.00	£300.00	£300.00
		Subtotal	£550.00
		Total	£550.00

TERMS & CONDITIONS

Payment due within 30 days of completion. Quote valid for 30 days.

YOUR SIGNATURE

Draw your signature below to confirm your agreement to this quote.

Clear

× Decline

✓ Accept quote

TIP: If a quote's gone quiet, check its status on the job card — you'll see at a glance whether it's been opened.

8. Converting Quotes to Invoices

Job done? Your accepted quote turns into an invoice, so there's nothing to re-type.

1. Open Invoices to view invoices.
2. Once an invoice has been paid you can change status to paid by clicking the arrow on the right of the relevant invoice
3. You can also use the send reminder button to generate some reminder text to the customer.

Invoices

⚠ £778.00 outstanding

From dd/mm/yyyy To dd/mm/yyyy This month

INVOICE	CUSTOMER	AMOUNT	PAID	STATUS	DOB	
INV-2026-0005	Larry Knight Outside Tap	£558.00	£0.00	Unpaid	21 Aug 2026	⌵
INV-2026-0004	Kevin Box Boiler	£228.00	£0.00	Unpaid	21 Aug 2026	⌵
INV-2026-0003	Isaac Rollins Shower	£120.00	£120.00	Paid	21 Jul 2026	⌵
INV-2026-0002	James Davis Boiler Service	£90.00	£90.00	Paid	11 Jul 2026	⌵
INV-2026-0001	James Davis Boiler Service	£300.00	£300.00	Paid	09 Jul 2026	⌵

9. Generating Job Sheets

Every job gets a downloadable PDF job sheet — the job details, what you're doing, the customer's details and your company info, all in one place.

1. Click on a job on the pipeline.
2. Open the job and select either view job sheet or download PDF.
3. Download the PDF, print it, or pull it up on your tablet on site.
4. Customer can sign the digital job on a tablet/phone using capture signature or via the printed form.

if Edit

CUSTOMER

Kevin Box
📞 07999787878
✉ kevin@pugmugmarketing.com
📍 1 High Street, A Town, B7 7ZZ

PRICE VS MATERIALS

Agreed price	£228.00
Materials cost	£0.00
Remaining	£228.00

if Open

if Add material

ACTIONS

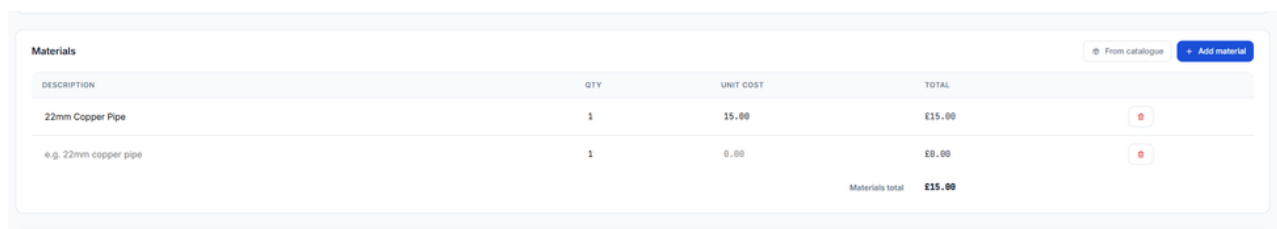
- 📄 View job sheet
- 📄 Download PDF
- ✍ Capture signature
- 🗑 Delete job

if Add note

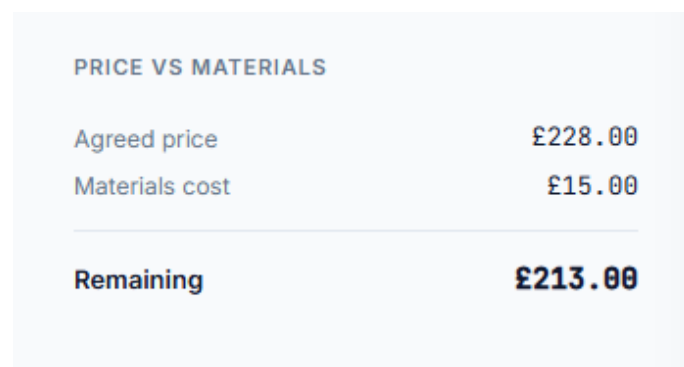
10. Materials Tracking & Profit Margin

Log every material cost against a job and Box Off works out your profit margin automatically – the agreed price minus what you actually spent.

1. Open the job on the job board and select Add Materials.
2. Log each material cost as you go, or add them all at the end.
3. Check the live profit/margin box on the job to see what you actually made.



DESCRIPTION	QTY	UNIT COST	TOTAL
22mm Copper Pipe	1	15.00	£15.00
e.g. 22mm copper pipe	1	0.00	£0.00
Materials total			£15.00

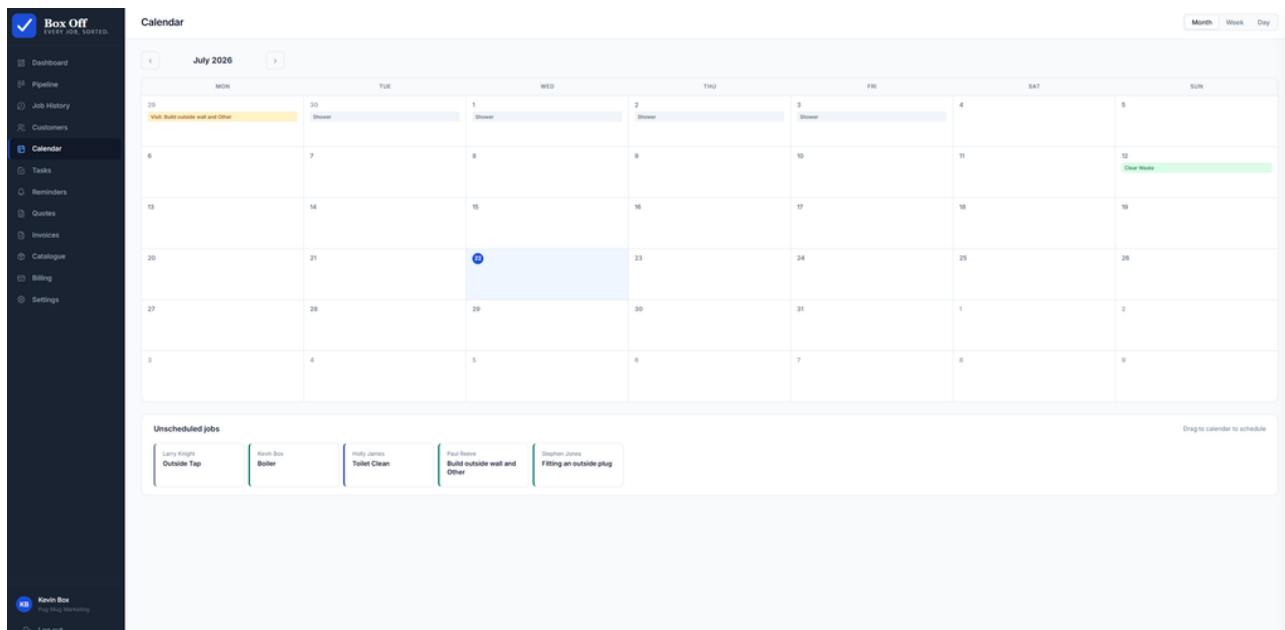


PRICE VS MATERIALS	
Agreed price	£228.00
Materials cost	£15.00
Remaining	£213.00

11. Calendar View

See your week laid out properly, by day, week or month – and stop double-booking yourself.

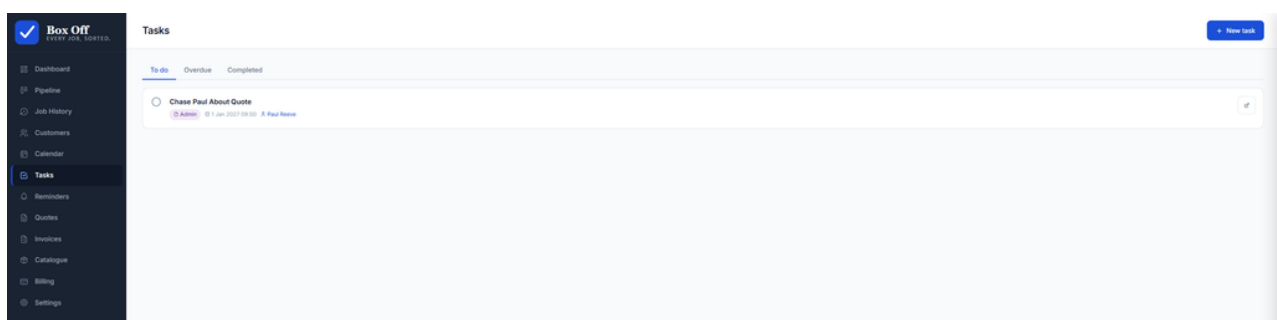
1. Go to Calendar in the main menu.
2. Scheduled jobs appear automatically once a quote is accepted.
3. Tap any entry to open the full job details.
4. Switch between day, week and month views to plan ahead.



12. Tasks & Reminders

Set reminders for follow-ups, callbacks, and anything else you'd otherwise trust to memory.

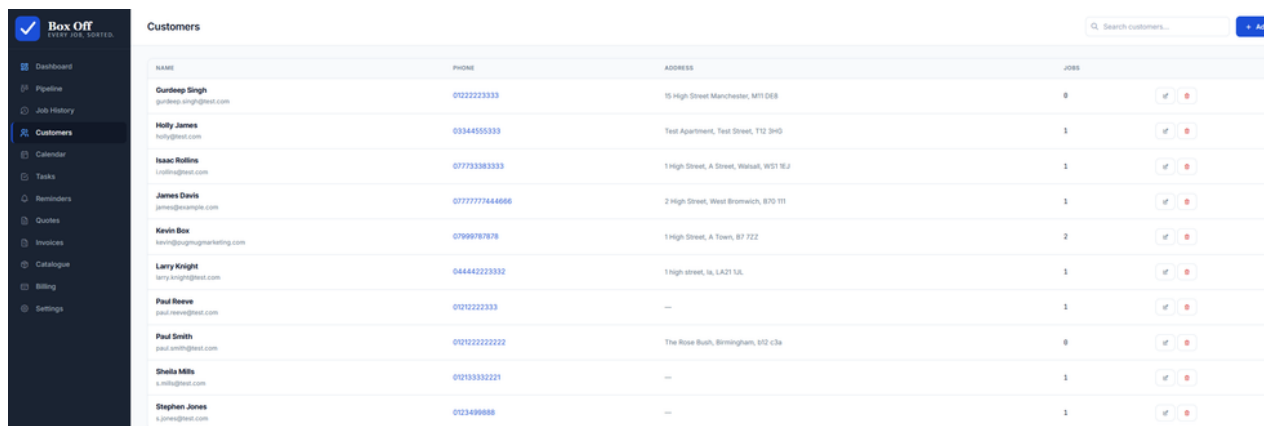
1. Open a job or customer record and select Add Reminder.
2. Set the date and a short note for what needs doing.
3. Box Off flags it when it's due, so a chased quote or a promised callback never slips through.



13. Getting the Most from Your Customer Record

Find which Mrs Jones had the boiler problem in about four seconds — every customer record links automatically to their jobs, quotes and invoices.

- Full contact and address history in one place
- Every past job, quote and invoice for that customer, in order
- Search and filter to find anyone in seconds
- Notes field for anything worth remembering next time you're on site



The screenshot shows the 'Box Off' software interface. On the left is a dark sidebar with a menu containing: Dashboard, Pipeline, Job History, Customers (highlighted), Calendar, Tasks, Reminders, Quotes, Invoices, Catalogue, Billing, and Settings. The main area is titled 'Customers' and features a search bar at the top right with the placeholder text 'Search customers...'. Below the search bar is a table with columns: NAME, PHONE, ADDRESS, JOBS, and a column with status icons (checkmark and red X). The table contains 10 rows of customer data.

NAME	PHONE	ADDRESS	JOBS	
Gurdeep Singh gurdeep.singh@boxoff.co.uk	01222223333	15 High Street Manchester, M1 1DB	0	✓ ✗
Holly James hollyj@boxoff.co.uk	03344555333	Test Apartment, Test Street, T12 345	1	✓ ✗
Isaac Rollins isacrollins@boxoff.co.uk	07773338333	1 High Street, A Street, Watnall, W51 1LJ	1	✓ ✗
James Davis jamesd@boxoff.co.uk	0777777444666	2 High Street, West Bromwich, B70 111	1	✓ ✗
Kevin Box kevin@boxoffmarketing.co.uk	07990787878	1 High Street, A Town, B7 722	2	✓ ✗
Larry Knight larry.knight@boxoff.co.uk	044442223332	1 High Street, 16, LA21 1LJ	1	✓ ✗
Paul Reeve paul.reeve@boxoff.co.uk	01212222333	---	1	✓ ✗
Paul Smith paul.smith@boxoff.co.uk	012122222222	The Rose Bush, Birmingham, B12 03a	0	✓ ✗
Shelia Mills s.mills@boxoff.co.uk	01213332221	---	1	✓ ✗
Stephen Jones s.jones@boxoff.co.uk	01234999888	---	1	✓ ✗

14. Billing

To manage subscriptions visit the billing tab.

- Subscription and billing
- Software invoices
- Update payment method
- Cancel subscription.

15. Getting Help

Stuck on something, or found a bug? Here's how to reach us.

- Visit boxoff.co.uk/support.php for FAQs and guides
- Email us via boxoff.co.uk/contact.php
- Check for feature updates on the Box Off Facebook page

Built for the van. Not the boardroom.



Box Off
EVERY JOB, SORTED.

boxoff.co.uk