SmartTrade
MOBILE

A guide to working with SmartTrade Mobile

September 2016

CONTENTS

SmartTrade

User Name:	
Password:	Password
Company Code:	
Remember Me	✔

Log in

Logging in

You will need to know your individual user name, password and company code to log in to SmartTrade Mobile successfully.
These should be provided by your office administrator.

Once logged in, you will stay logged in unless you specifically log out

> The user name, password and company code can be found on your Employee record and in the Mobile preferences:

Mobile Preferences

Company Code

☑ Sync all client details to mobile

Jobs list to show
○ Job Due Date
◉ Next Appointment Date

Before a job is returned the following will be checked

| Job note added | No check necessary |
| Mandatory SmartForms signed off | Warning only |

The Home Page

From here you can view any update messages SmartTrade sends and can access the GoTo panel.

The GoTo panel makes navigating between pages easier.

Open it by tapping on the GoTo button or by swiping across the screen from the left to right.

Home

To learn more about the new SmartTrade Mobile, view these short presentations (download as PDFs).

Overview (includes a list of new features)

Jobs

Clients

Forms

We're excited about t[...]martTrade Mobile, and look forward to receiving your feedback.

✉ feedback@smarttrade.biz

The team at SmartTrade

GoTo

> The GoTo button is in the bottom left corner of every page.

The GoTo panel

Is a quick way to navigate between pages, simply tap on any item to go to that page.

The GoTo panel also provides helpful information.

GoTo

⌂ Home	otal
Jobs	1 new	0 hrs
Appointments	83 h
Timesheets	⟳	0 hrs
Clients	07 h
Suppliers	0 hrs
Orders	
⚙ Settings	
Hints and tips	
Support and tools	
Sync moments ago	⟳
Log out (Kevin G)	

> There is one new job. If there is no new jobs, the total number of jobs will be shown.

> The Timer is running

> Tap to Sync

> *After you log in leave your browser open and SmartTrade Mobile running. This means you will be able to work offline if you don't have an internet connection.*

The Jobs List

This lists the jobs that have been dispatched to you.

Here you can see the main details of the job such as the client, site address, telephone numbers, order number, time entered and appointment date and time.

By using the Add or Action buttons on the job you can easily access the different areas of the job.

The blue control buttons at the bottom of the screen allow you to sort or filter the jobs to suit you
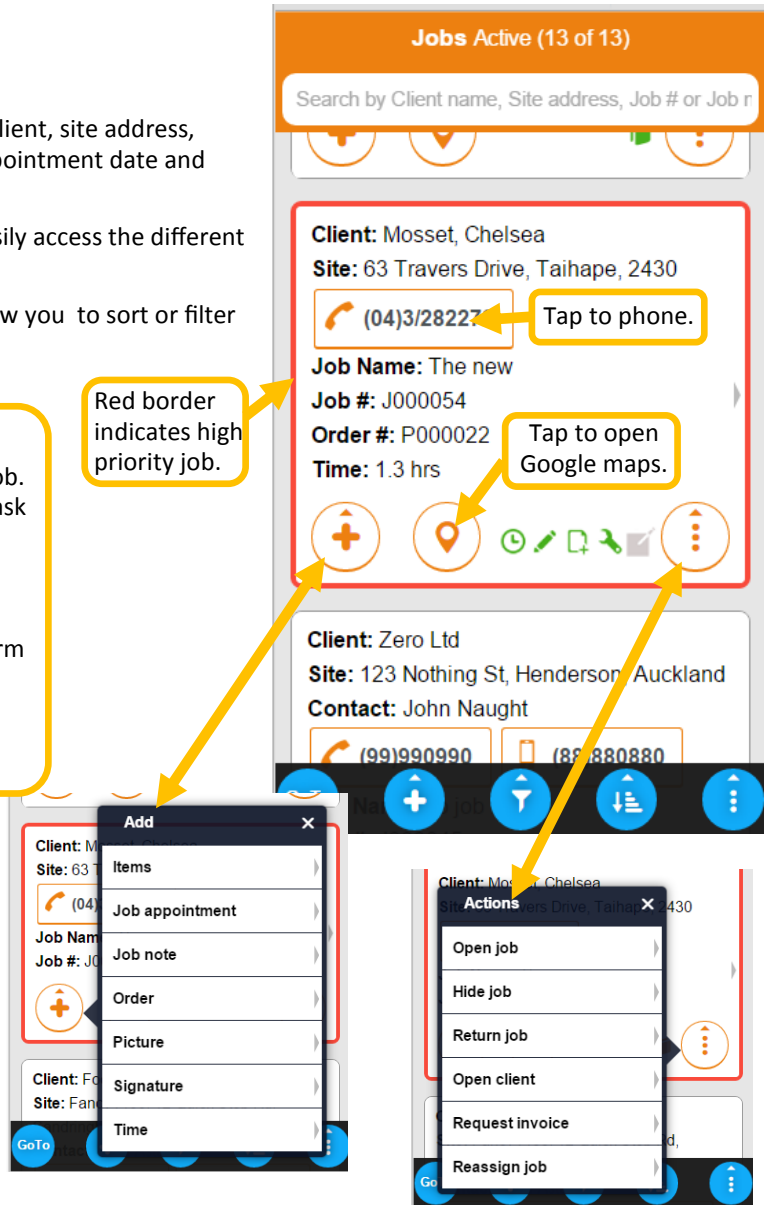
Reminder Icons

In the jobs list, icons show the status of tasks for each job. If icon the is grey, the task is outstanding, if green the task is done.

🕐 Add timesheet

✏️ Change workflow status

📄 Add note

🔧 Add materials

📗 Add signature

📗 Complete an optional form

📗 Complete a required form

Tap to phone.

Red border indicates high priority job.

Tap to open Google maps.

Add
- Items
- Job appointment
- Job note
- Order
- Picture
- Signature
- Time

Actions
- Open job
- Hide job
- Return job
- Open client
- Request invoice
- Reassign job

The Add Button

Add a client or job

Add
- Client
- + Job
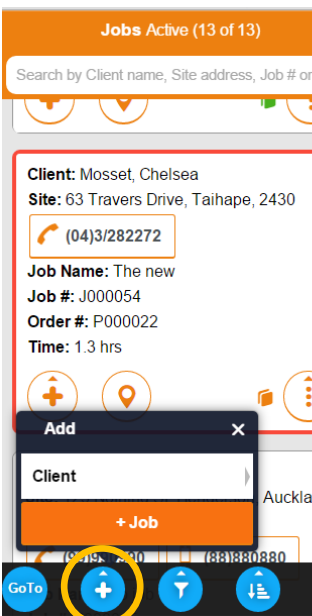
The Filter Button

Use to show only the jobs you want to see.

Filter
- Show Active (13)
- Show All (13)
- Show Hidden (0)
- Show New (0)
- Show Returning (0)
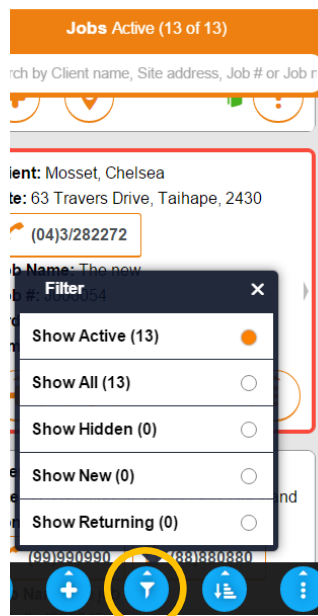
The Sort Button

Select the criteria for how the jobs are sorted.

Sort by
- City
- Client Name
- Job #
- Job # (ascending)
- Job Due Date
- Next Appointment Date
- Postcode
- Priority
- Site ID
- Suburb
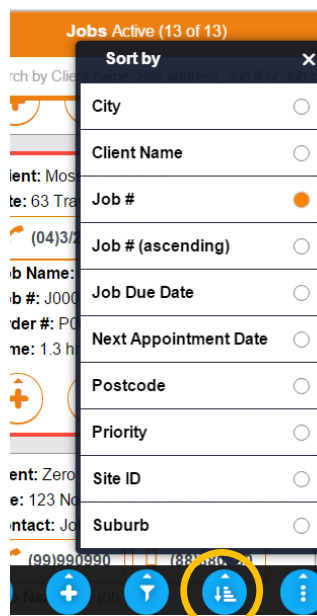
The Actions Button

Return multiple jobs or show costs on the job sheet and costing tab.

Actions
- Return 13 Jobs
- Show costs
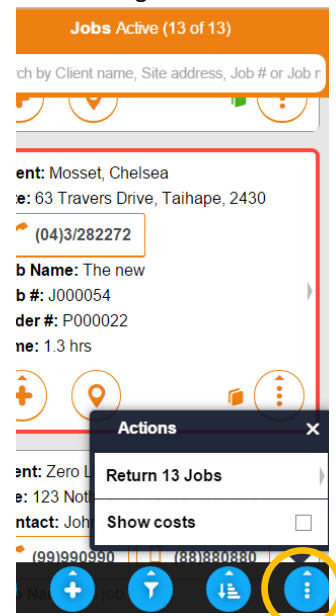
The Job Card

When you tap to open a job from the jobs list the following details are displayed:

The Timer is running

Tab Scroll Bar
Scroll across to see all tabs, tap on the tab to go to that page.

Charge Up: S000032

| Job Card | Client /Site | Job Sheet | Notes | App |

Job Name:	Fix broken fittings
Category:	Service
Status:	Waiting for parts
Priority:	Normal

Click to select new job status from list.

Opened:	Tue, 15 Sep 2015
Due Date:	Mon, 05 O...	1:00 p...
Next Appt:	Fri, 02 Oct 2015 3:00 p.

Fix the broken fittings on the input manifold

GoTo

The Client/Site

From here you view/edit all the client's details and notes.

Quote: J000001

| Job Card | Client /Site | Job Sheet | Notes | Job Appointm |

Client

Footloose Dance Studio

Tap to view client details.

| Reference: | 46568 |

Contact: Fred Astair

| (09)9875689 | (021)852963 |

Tap to phone

Client notes (0)

Postdated cheque for 20th next month is acceptable for payment.

Site

Fancy Free: 12 Quick Step Rd, Sandringham, Auckland

Tap to open Google Maps

Contact: Fred Astair

| (09)9875689 | (021)852963 |

GoTo

How to add an item to the job sheet
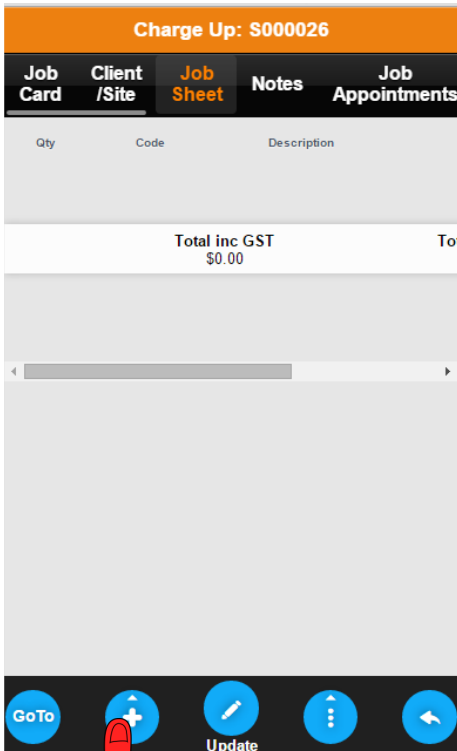
To add an item to the job sheet from inside the job, tap on the blue plus button this will bring up the Add menu and now select +Item.

The Find MyData Item page will open.

NOTE — You can access the Add menu from anywhere in the job by simply tapping the plus button. When you open the Add menu from the Job Sheet the items relating to that page will be highlighted in orange, if you open the Add Menu from another page +Item and +Heading will be in the alphabetical listing and items relating to that page will be in orange.
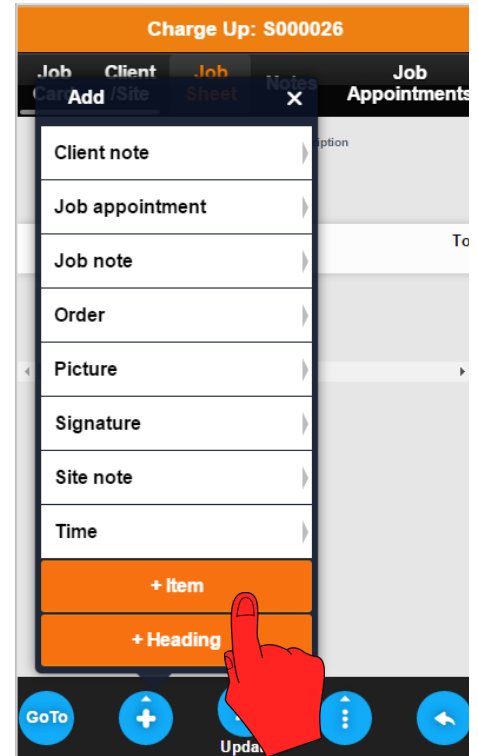

Finding Items

From the Find MyData Item page you can search for the MyData item you wish to add to the job sheet. You can search by Category or Supplier by tapping the drop down menu and selecting the criteria. In the Search field you search by any keyword or number in the code or description.
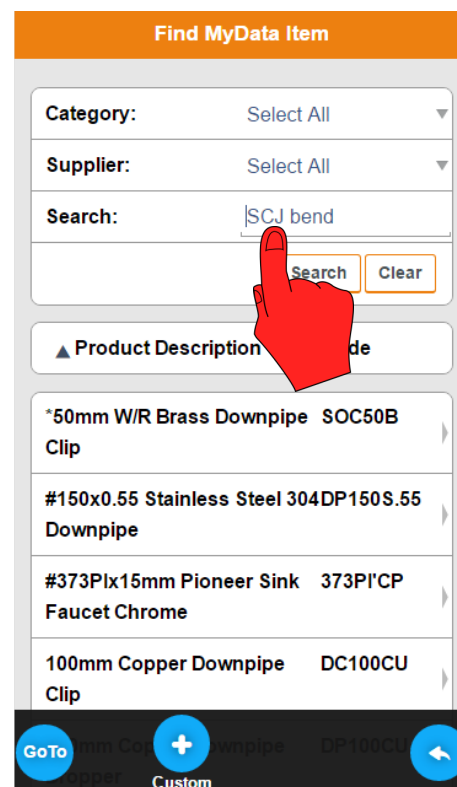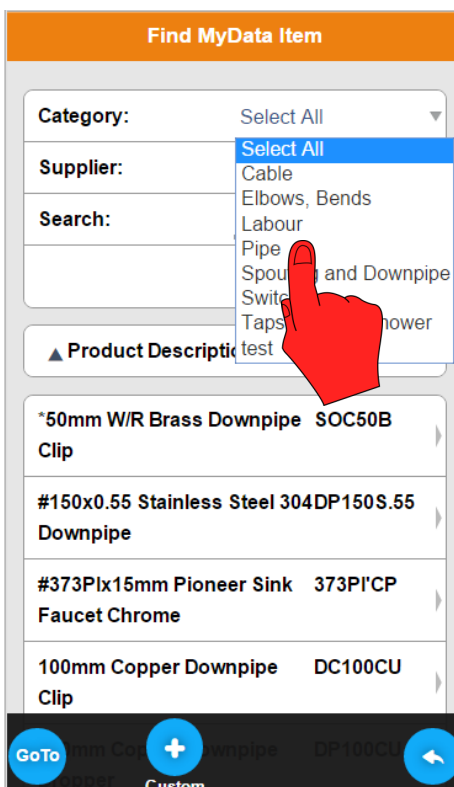
Adding Items to the Job Sheet

When you have found the item, tap on it and an "Add Line Item" box will pop up and you will have two choices.

1) **Quick Add** will add the item to the job sheet with a quantity of one.

2) **Add** will open the item and you will be able to edit the description, quantity and prices.
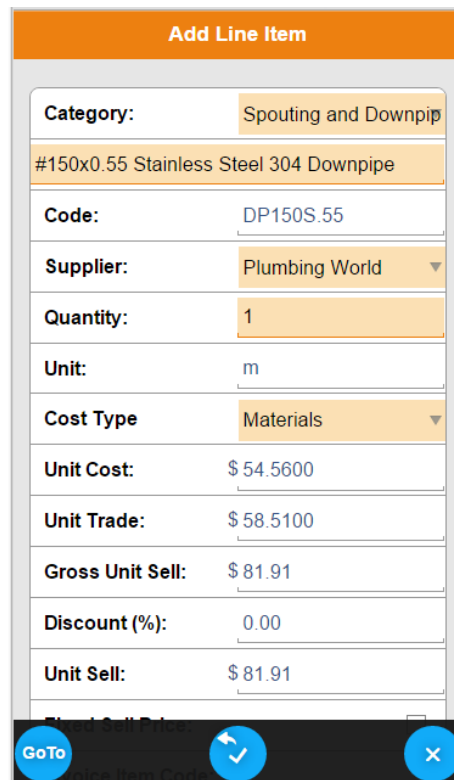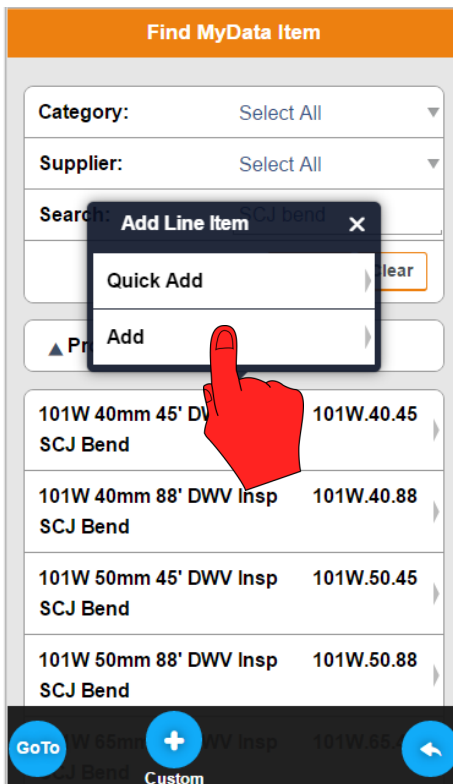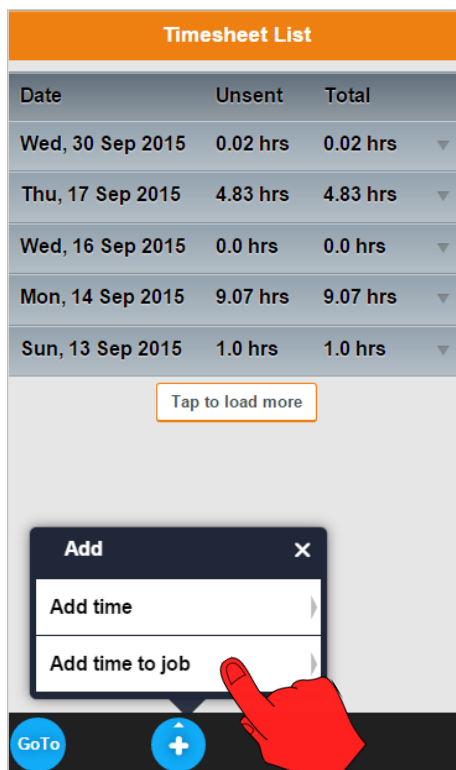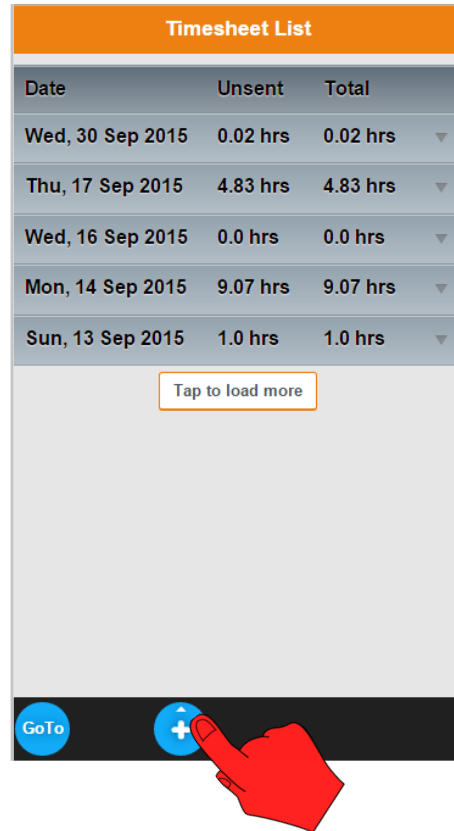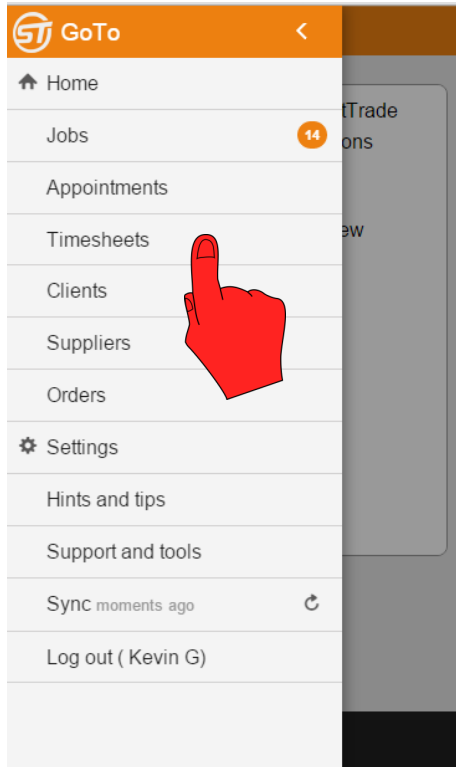

If the item you want to add to the job sheet is not in MyData you can add the item as a custom item.

Tap on the blue **Custom** button and blank Add Line Item page will open and you enter the details of the item.
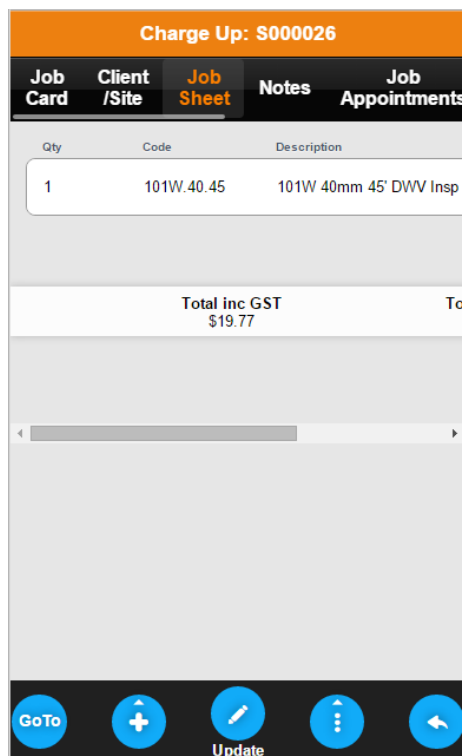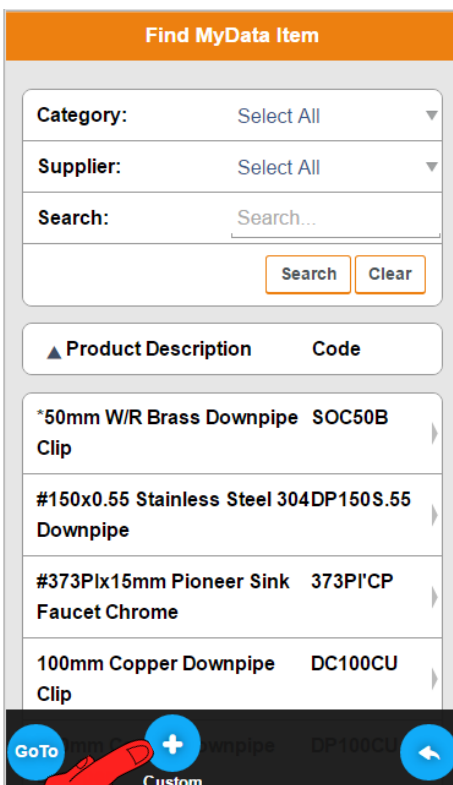
Timesheets

From the GoTo menu select Timesheets, this will take you the Timesheet List, tap the blue Plus button to add time.
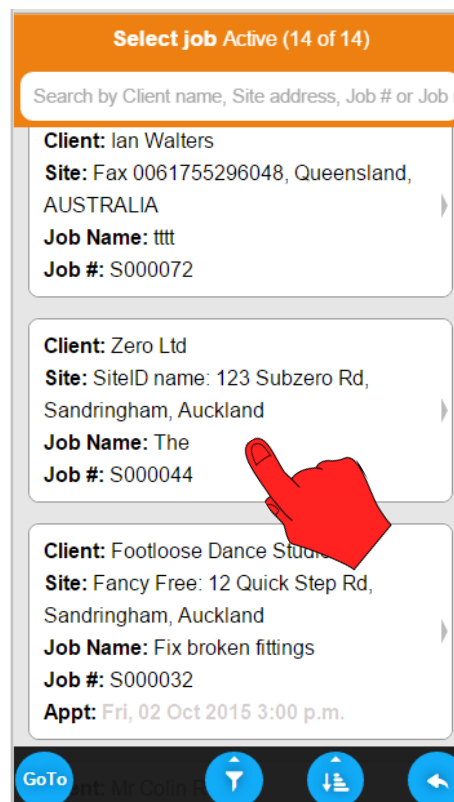
When you tap the Plus button an "Add" dialog box will pop up and you will have two choices

1) **Add time** to add non job related time e.g. lunch.

2) **Add time to job** to add job related time.

Select the job you wish to add time to.

Timesheets— using the Timer to enter the time

Timesheet Entry

SiteID name: 123 Subzero Rd, Sandringham, Auckland

Zero Ltd
S000044 - The

Activity:	Workshop ▼
Chargeable:	✓
Labour Rate:	our - Tradesman▼

Date:	Wed, 07 Oct 2015
Start:	7:30 a.m. **NOW**
End:	8:30 a.m. **NOW**
Duration:	1.0 hrs

| -0.1hr | +0.1hr | +1hr | -1hr |

GoTo | ⏱ Start | ✓ | ✕

Select the Activity for the entry.

Timesheet Entry

| Chargeable: | ☐ |
| Labour Rate: | Labour - Tradesman▼ |

Date:	Wed, 07 Oct 2015
Start:	7:30 a.m. **NOW**
End:	8:30 a.m. **NOW**
Duration:	1.0 hrs

| -0.1hr | +0.1hr | +1hr | -1hr |

Enter Note

max 254 chars;   0 used so far

GoTo | ⏱ Start | ✓ | ✕

Add note if required, you may have to scroll down to see the Notes field.

Timesheet Entry

SiteID name: 123 Subzero Rd, Sandringham, Auckland

Zero Ltd
S000044 - The

Activity:	Workshop ▼
Chargeable:	✓
Labour Rate:	Labour - Tradesman▼

Date:	Wed, 07 Oct 2015
Start:	7:30 a.m. **NOW**
End:	8:30 a.m. **NOW**
Duration:	1.0 hrs

| -0.1hr | +0.1hr | +1hr | -1hr |

GoTo | ⏱ Start | | ✕

Tap the Start button to start the timer.

Timesheet Entry

SiteID name: 123 Subzero Rd, Sandringham, Auckland

Zero Ltd
S000044 - The

Activity:	Workshop ▼
Chargeable:	✓
Labour Rate:	Labour - Tradesman▼

Date:	Wed, 07 Oct 2015
Start:	1:43 p.m. **NOW**
End:	1:43 p.m. **NOW**
Duration:	0.0 hrs

| -0.1hr | +0.1hr | +1hr | -1hr |

GoTo | ⏹ Stop | | ↩

Tap the Stop the timer and record the time.

Timesheets— using Start/Finish times to enter the time

Select the Activity for the entry.

Note: the date will default to today.

Add note if required, you may have to scroll down to see the Notes field.

Tap on the Start and End times to change them.

Tap the Tick button to save and record the time.

Timesheets— using Duration to enter the time

Settings

Jobs	▼
Orders	▼
Appointments	▼
Timesheets	▲

⑦ Help	▼

Entry Type:	By Duration ▼
Calculation:	Duration = End - Sta
Default interval:	0.10 hour units ▼
Default Duration:	1.0 hrs
Default Start:	7:30 a.m.

This Help explains each entry type

GoTo

To change the method of entering the time, go to the GoTo menu and select Settings and in Settings select Timesheets and then you will be able to change the Entry Type.

Timesheet Entry

SiteID name: 123 Subzero Rd, Sandringham, Auckland

Zero Ltd
S000044 - The

Activity:	Select Activity ▼
Chargeable:	☐
Labour Rate:	our - Tradesman▼

Date:	Wed, 07 Oct 2015
Duration:	1.0 hrs

-0.1hr	+0.1hr	+1hr	-1hr

Enter Note

GoTo ✓ ✕

Select the Activity for the entry.

Note: the date will default to today.

Timesheet Entry

SiteID name: 123 Subzero Rd, Sandringham, Auckland

Zero Ltd
S000044 - The

Activity:	Workshop ▼
Chargeable:	✓
Labour Rate:	Labour - Tradesman▼

Date:	Wed, 07 Oct 2015
Duration:	1.0 hrs

-0.1hr	+0.1hr	+1hr	-

Enter Note

GoTo ✓ ✕

Tap on Duration to enter the duration.

Timesheet Entry

SiteID name: 123 Subzero Rd, Sandringham, Auckland

Zero Ltd
S000044 - The

Activity:	Workshop ▼
Chargeable:	✓
Labour Rate:	Labour - Tradesman▼

Date:	Wed, 07 Oct 2015
Duration:	1.0 hrs

-0.1hr	+0.1hr	+1hr	-1hr

Enter Note

GoTo ✓ ✕

Tap the Tick button to save and record the time.

Adding Forms to a job

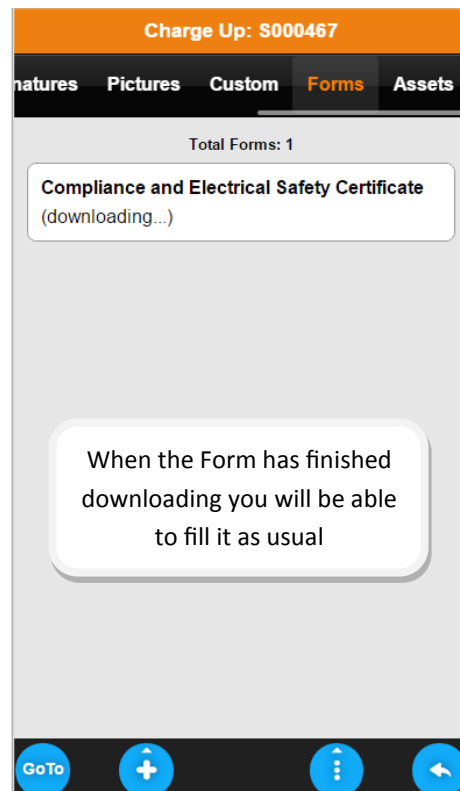To add a Form to a new job created on the mobile device or an existing job, scroll to Forms in the top menu bar, tap on the blue plus button and select **+Form**.
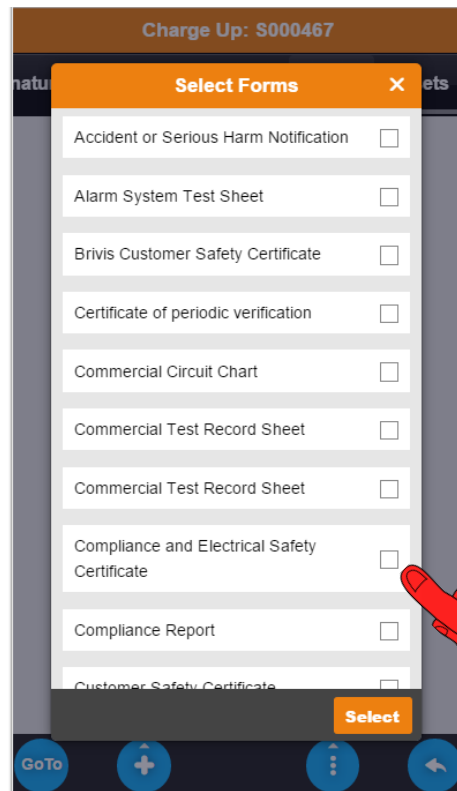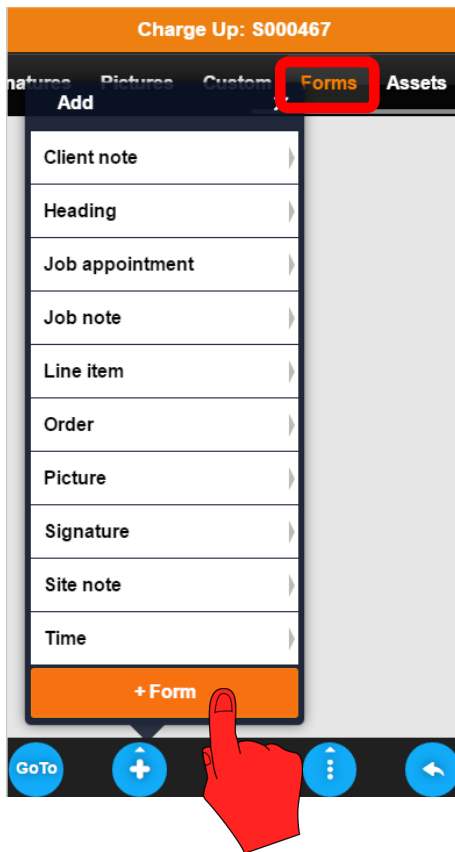
If you are working Off-line you will only see Forms which are on the device i.e. being used on other jobs. When you are working On-Line you will see all the Forms in the system and will be able to download the Form you require.
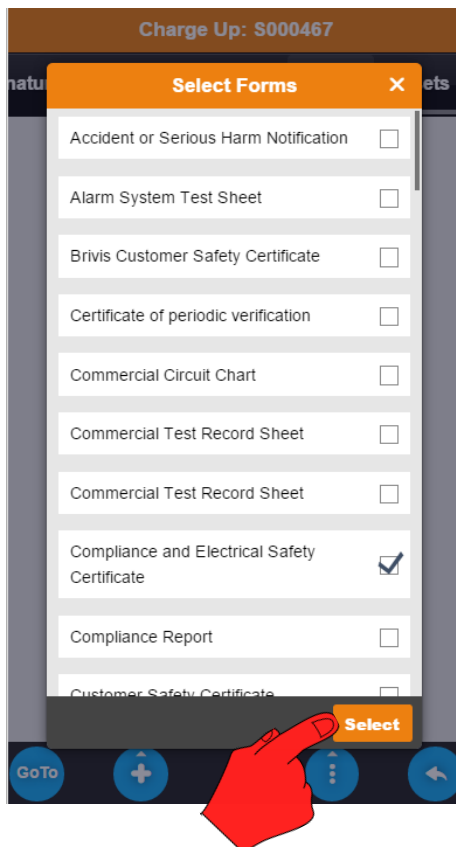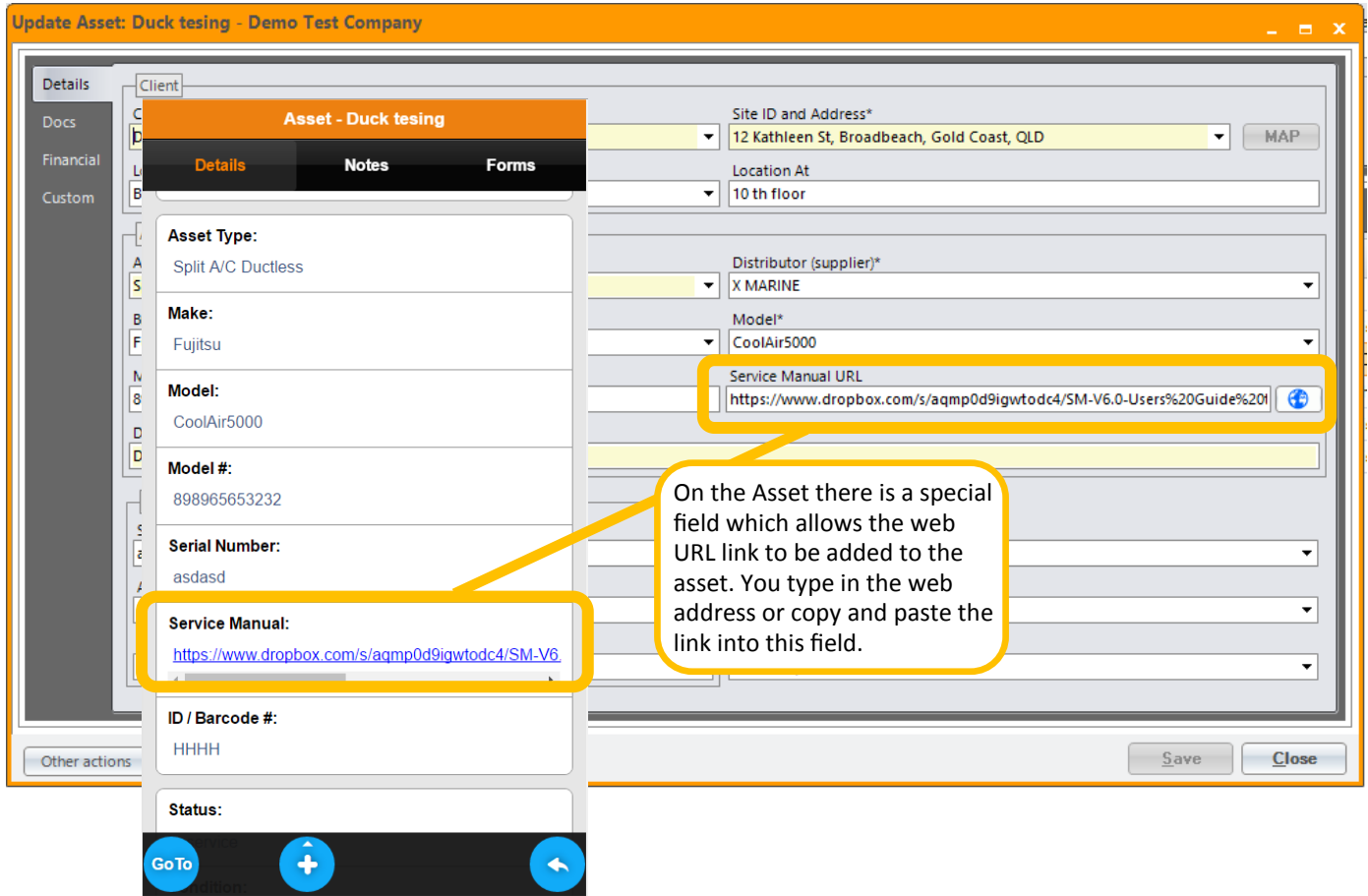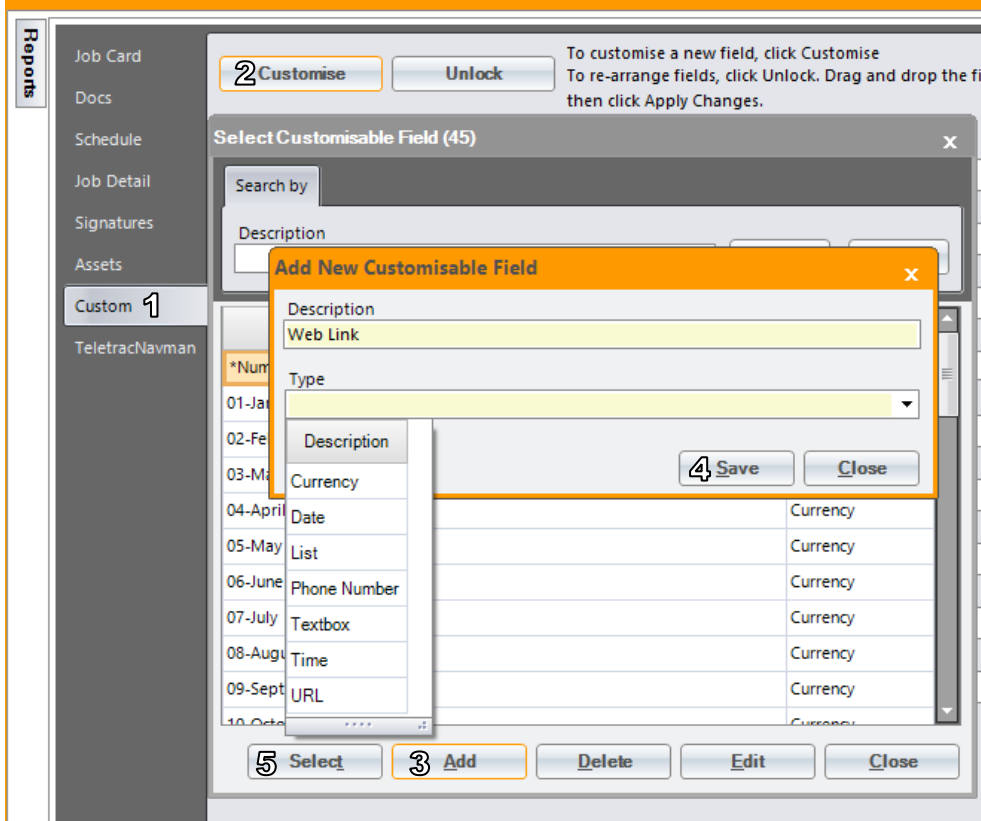
Linking Files to Jobs and Assets

Files can linked to jobs and assets if they have web address, such as a link from Dropbox, Google Drive, Microsoft OneDrive or a manufacturer's website. A link is added in the office and Mobile user will be able to open the link in SmartTrade Mobile and view the files.

This functionality will allow you to access files relating to the job remotely from SmartTrade Mobile.

On the Asset there is a special field which allows the web URL link to be added to the asset. You type in the web address or copy and paste the link into this field.

## Creating a Custom Field on a job for the web link.

From within a job click on the Custom[1] tab, this will take you the Custom Fields window. Now click the Customise[2] button this will open the "Select Customisable Field" window. Click the Add[3] button to open the "Add New Customisable Field" window. Type in the name you wish to use in the Description field and select "URL" from the Type field. Click Save[4].

To add the field to the job highlight the field name and click Select[5]. Once you have added the field to a job it will available for use on all jobs. For the field to be displayed on the Mobile it has to be one of the first ten fields on the job.

Note: These instructions show adding a link to a job, but links can be also added clients and sites.
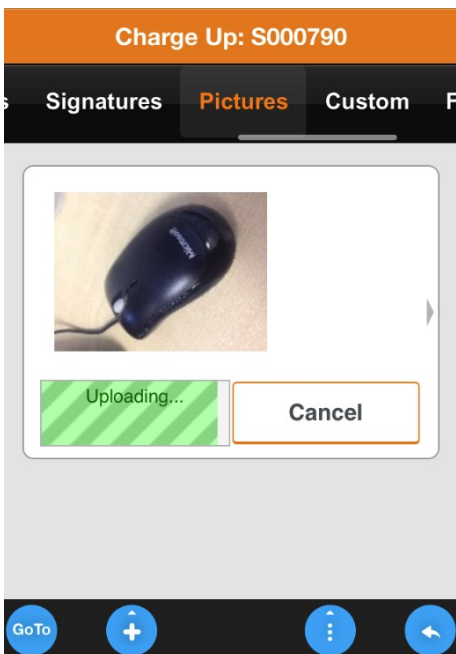

13

Photos

You can add photos to a job by using the camera or from a photo library on your mobile device.
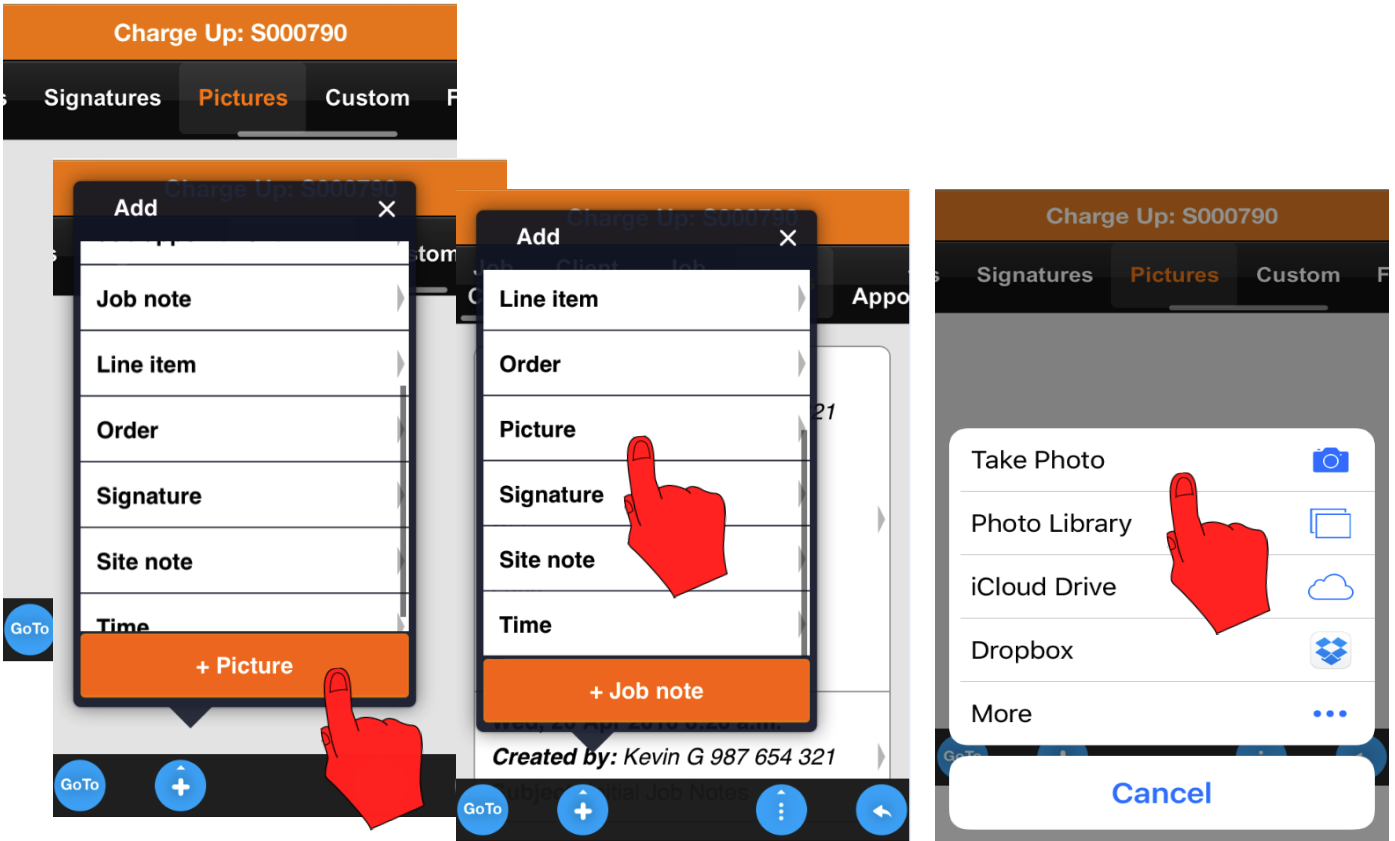
To add a photo to the job tap on the blue plus button this will bring up the Add menu and now select +Picture .
Note: You can do this from any page in the job

Select how you wish to add the photo to the job, either by taking a photo or adding it from another source.
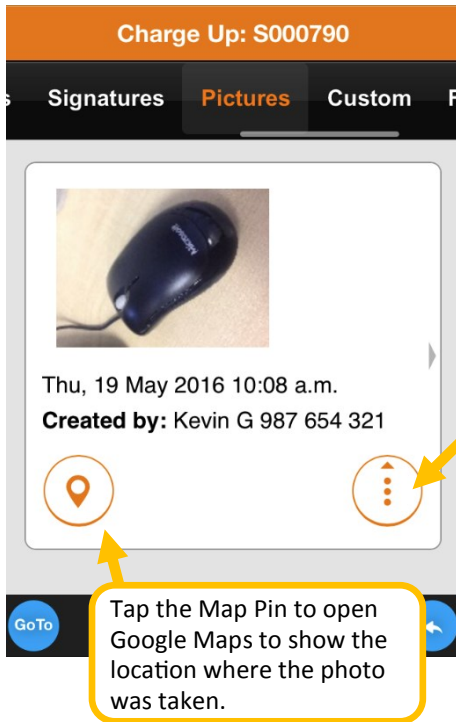

Once you have taken or selected the photo, the photo will be uploaded to the job.
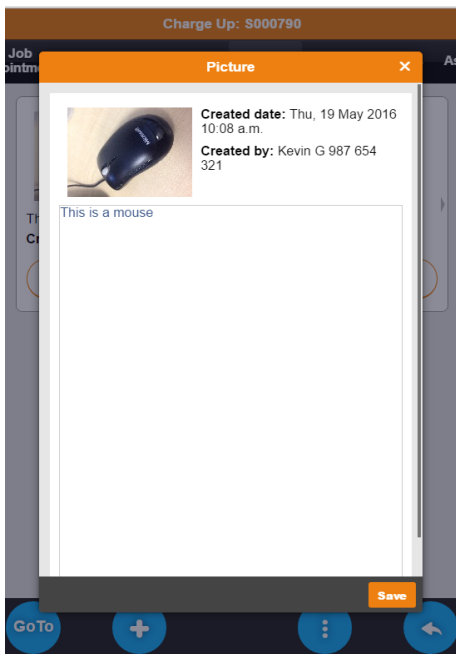When the photo has uploaded you can add notes to it.
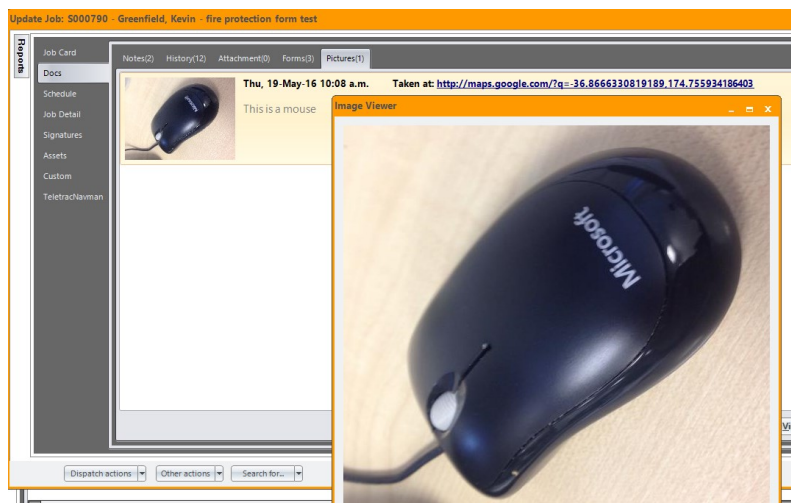
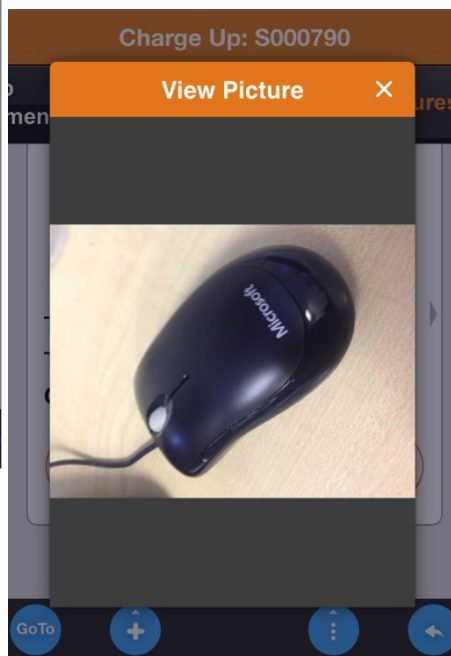The photo will also available on the job in SmartTrade in the office and for any other user who has the job on their device.

Photos

Tap the Actions button or you can just tap to open the Actions menu. Or tap on the photo to open the photo.

Tap the Map Pin to open Google Maps to show the location where the photo was taken.
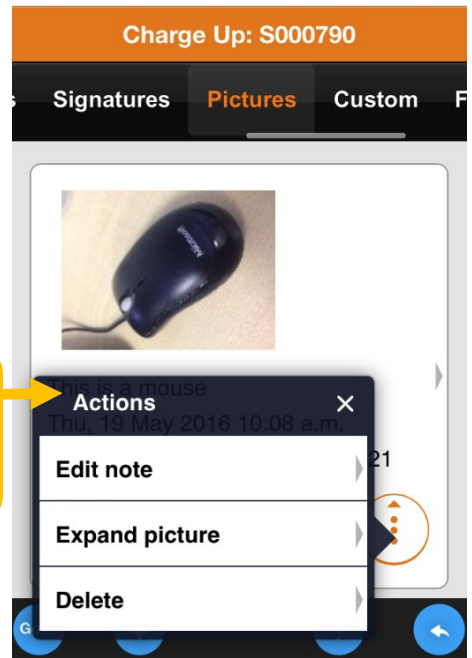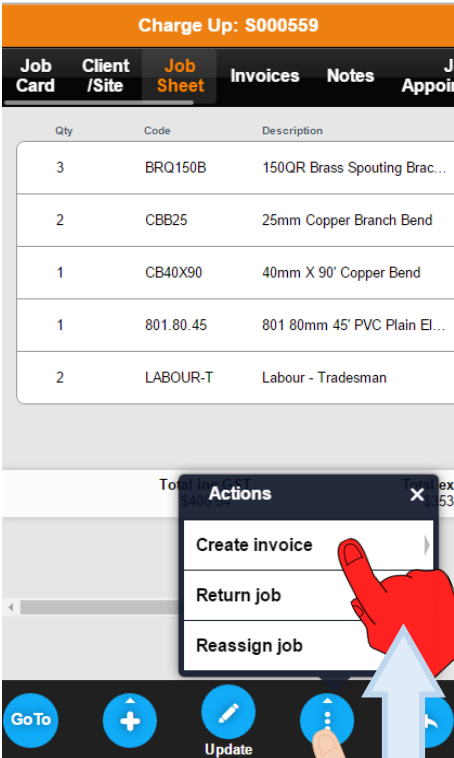
Add a note to the photo.

When viewing the photo use a spread gesture to zoom in or a pinch gesture to reduce the photo
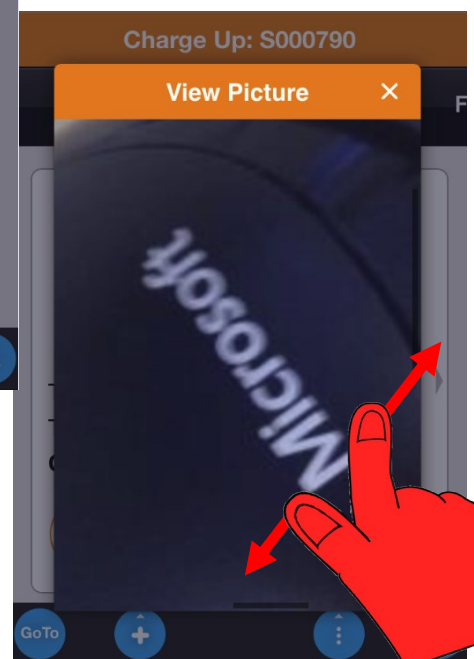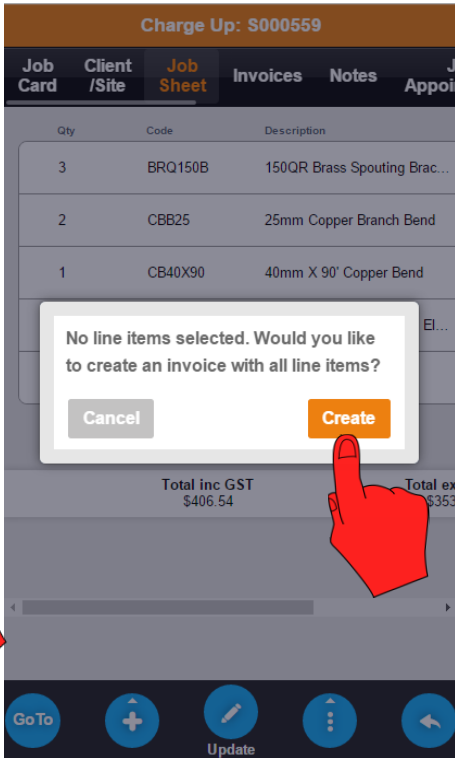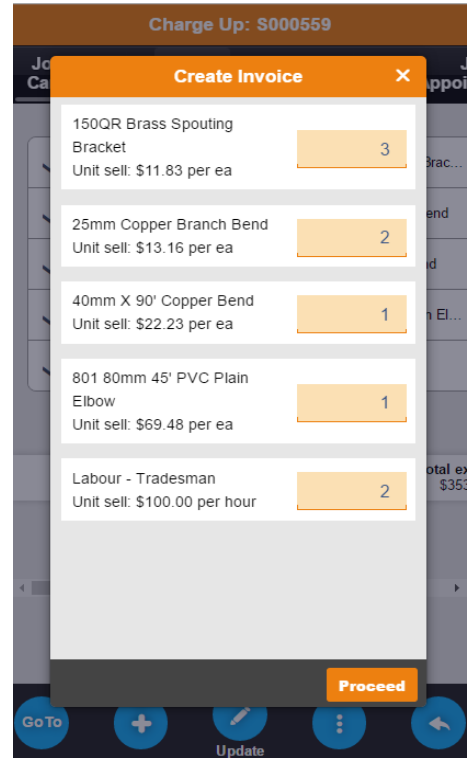
Creating an Invoice

After adding items and time to the Job Sheet you can create an invoice for your client on site.

On the Job Sheet tab, tap on the blue Actions button and select Create Invoice.

After selecting "Create Invoice" you will get a message allowing you to create an invoice with all items on the Job Sheet.

After tapping on Create, the Create Invoice window appears and allows you to change the quantities to be invoiced. Tap on Proceed to create the invoice.

NOTE — If you want to create an invoice by selecting individual items use the method detailed below.
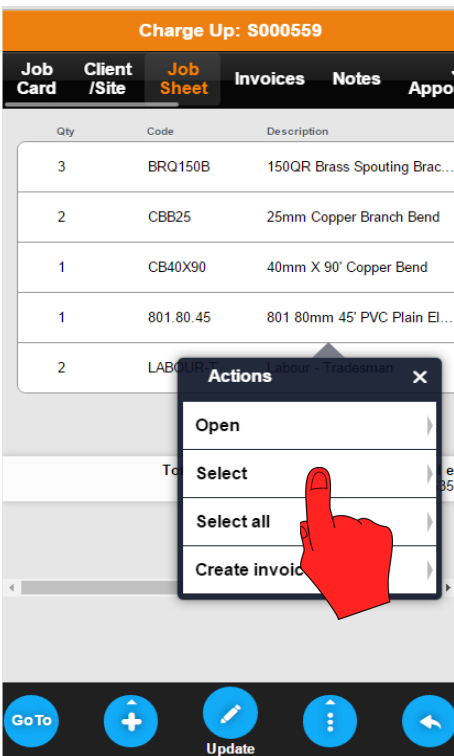
On the Job Sheet tab, tap on the items grid to bring up the Actions menu from here you can select individual items or all the items to be invoiced.
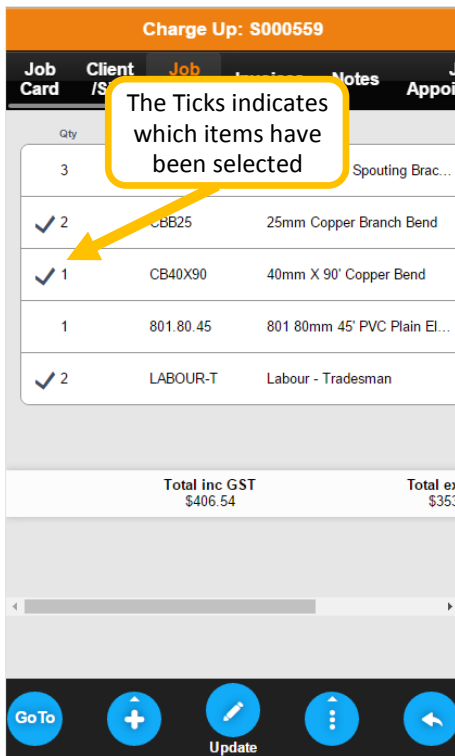
The Job Sheet with the selected items is now ready to be invoiced.

On the Job Sheet tab, tap on the items grid to bring up the Actions menu. From here select Create Invoice.

Creating an Invoice continued

NEW

Job: S000559	
Invoice #:	<<Generate>>
Prefix:	R
Suffix:	
Invoiced to:	Greenfield, Kevin
Type:	Draft
Status:	Select Status

Total exc GST:	$353.52
GST:	$53.02
Total inc GST:	$406.54

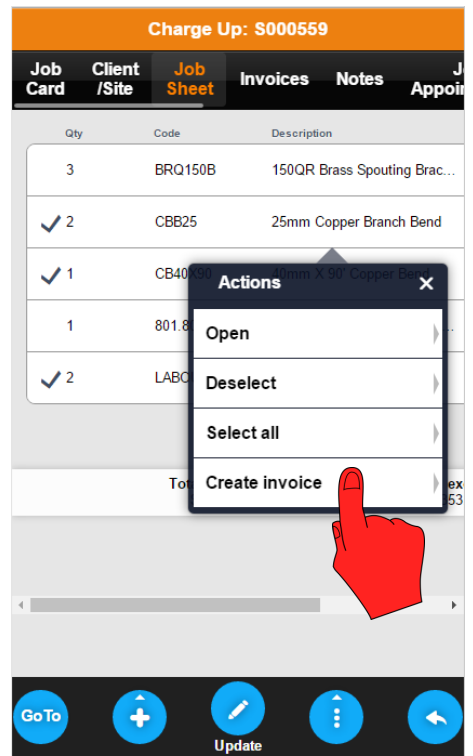| Invoiced:	07/07/2016
Due:	14/07/2016

Header:
Enter Header

Footer:
Enter Footer

GoTo ✓ ✕

SmartTrade will generate the invoice number when you confirm the invoice. You can change or add a prefix or suffix to the generated invoice number.

Type— this will default to ether Draft or Confirmed depending on the Preference settings in SmartTrade Office.

Status— the statuses are set up in SmartTrade Office, you can select the appropriate status from the drop down list.

The **Header** and **Footer** fields allow text to be added to the invoice The header appears below the address. The footer appears at the bottom of the invoice.

You can save the invoice as a Draft or Confirmed this will allow you to preview the invoice.

If the invoice has been saved as a Draft you can Confirm it from the Action button.

Actions ✕
Confirm
Preview

GoTo ⋮

Job: S000559	
Invoice #:	000200 Confirmed
Prefix:	R
Suffix:	
Invoiced to:	Greenfield, Kevin
Status:	Select Status

Total exc GST:	$353.52
GST:	$53.02
Total inc GST:	$406.54

Invoiced:	26/07/2016
	2/08/2016

Actions ✕
Customer Sign-off
Email
Preview

GoTo ⋮

When you have confirmed the invoice you can get client to sign it off, email it or preview it.

Sign invoice for job: S000559

Invoice # R000200 dated 27 Jul 2016 for $406.54 (inc tax) was accepted by or on behalf of Greenfield, Kevin by:

▼ Kevin

Kevin (signature)

Clear

Signature note:
Enter Note

GoTo ✓ ✕

The client can sign off and add a note to the invoice.

Job: S000559	
Invoice #:	000200 Signed
Prefix:	R
Suffix:	

Send email ✕

Email will be sent from SmartTrade Essential/Ultimate.

To: Kevin@smarttrade.biz
Cc:
Bcc:

Send

Header:
Enter Header

GoTo ⋮

The invoice can be emailed to the client, it will emailed from SmartTrade Office using any default settings.

Preview invoice

Invoice # R000149
Job # S000559
Date 8 Jul 2016
Your ref
To Greenfield, Kevin
Due 15 Jul 2016

Line items ▲

Qty	Code	Description
3	BRQ150B	150QR Brass Spout Bracket
2	CBB25	25mm Copper Branc
1	CB40X90	40mm X 90' Copper
1	801.80.45	801 80mm 45' PVC Elbow
2	LABOUR-T	Labour - Tradesman

|	
Total exc GST:	$353.52
GST:	$53.02
Total inc GST:	$406.54

GoTo

The client can be shown a preview of the invoice.

Returning Jobs

When you have finished with the job it must be returned to the office. The job can be returned from several places:

1) The Job List Action button will let you return all jobs.
2) The Action button on the job will return that job only.
3) The blue Action button in the job will return that job only.
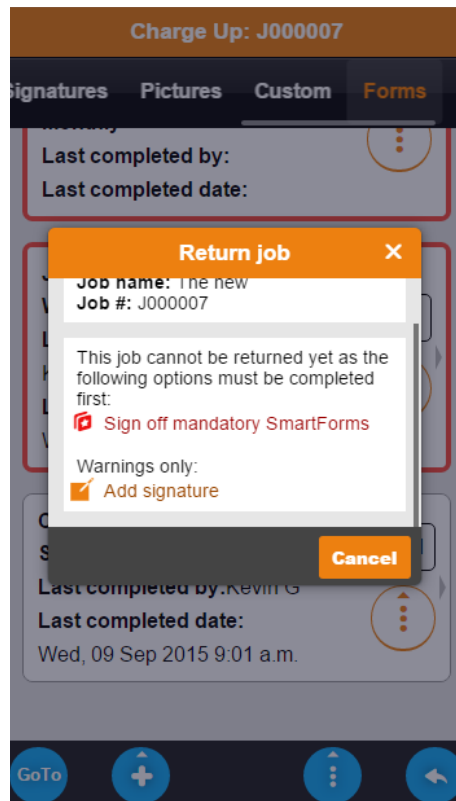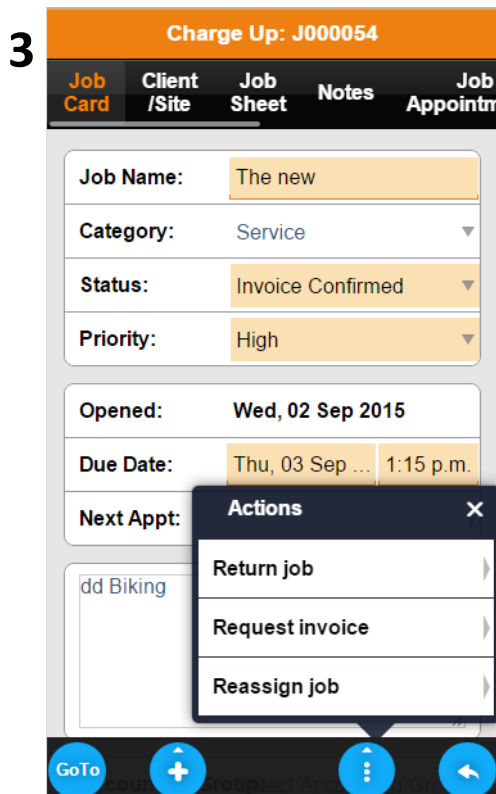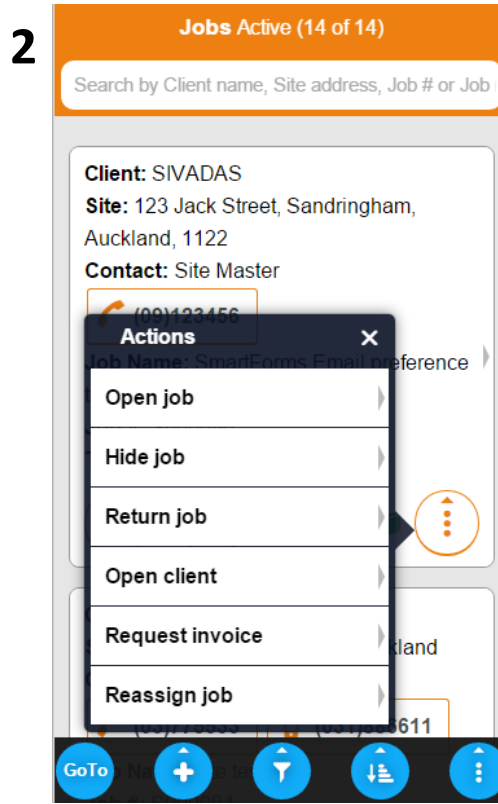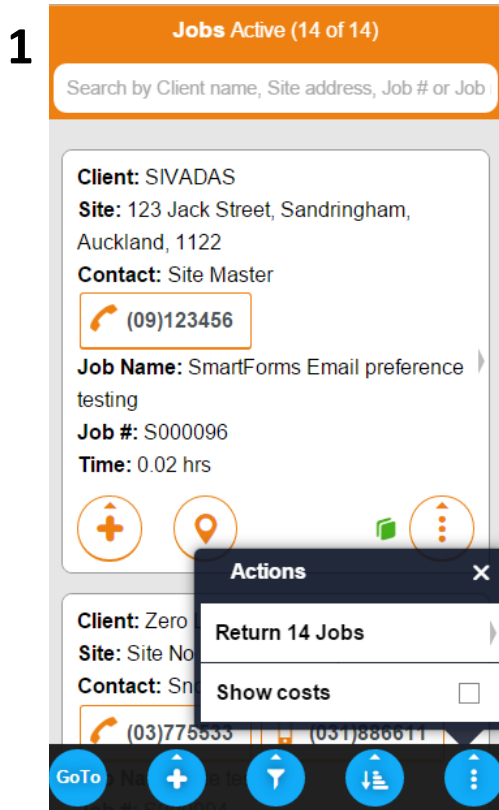
NOTE — Depending on the preferences set in the office you may get warnings or be restricted from returning the job until certain actions have been made.

Adding Clients and Sites

You can add a client from the Job List page or when you are creating a job.

Fill in the client's details, you can add the client as a company or a person and tap the blue Tick button to save the entry.
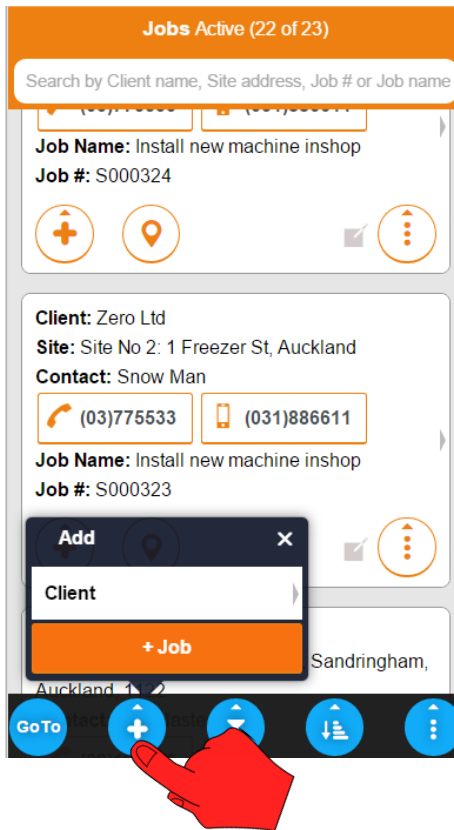
Adding a Site

You can add a site to the client from within the Job or when you are editing the client.

Fill in the site's details, and tap the blue Tick button to save the entry.

Adding a job

You add both charge-up and quote type jobs on SmartTrade Mobile.

From the job list, tap on the Plus button and select Job.
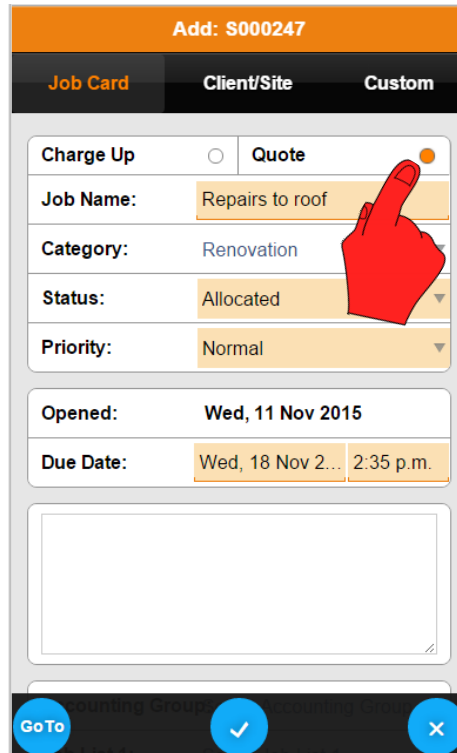
When the job card opens select the type of job you are adding.

Fill in the job details.
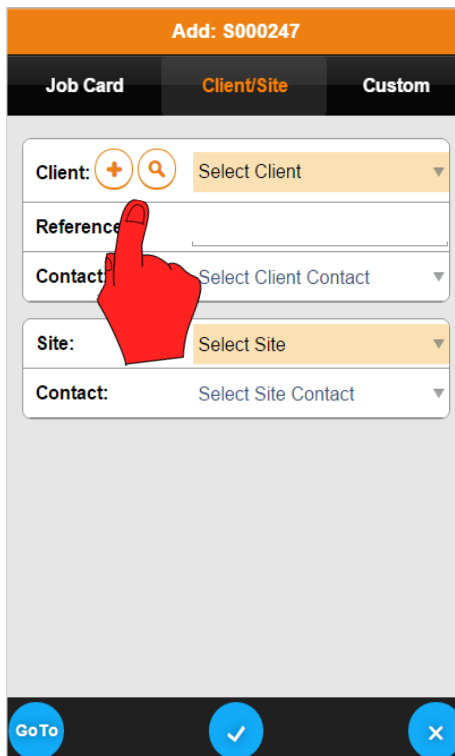
On the Client/Site tab you can add a new client and site or search for an existing client (only if preferences have been set up.) If the client is already on your device select it from the drop down menu.
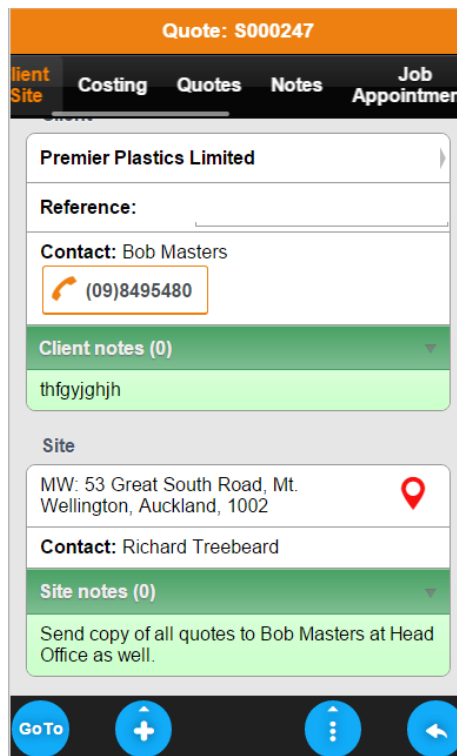
Once you have found or selected the client, you can view the client details and notes.

Creating a quote

After saving the job will be able to add items to the Costing tab to create your quote.

Adding items to the Costing tab is the same as adding items to the Job Sheet, see pages six and seven for details.

When you have finished adding items to the Costing, tap on an item to open the Action menu and you can select the item or all the items.
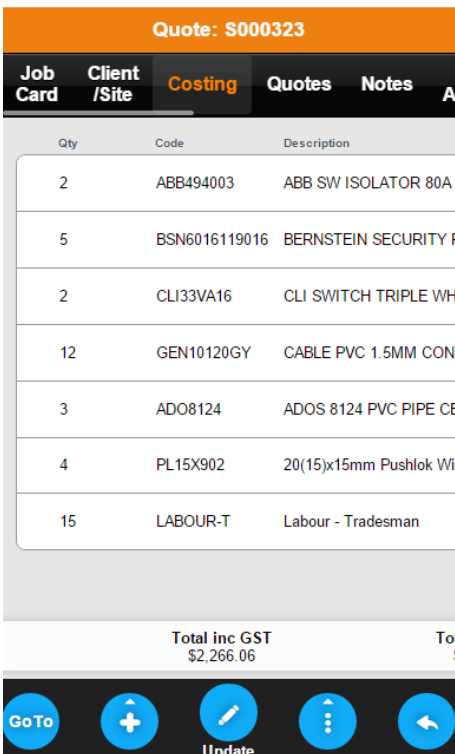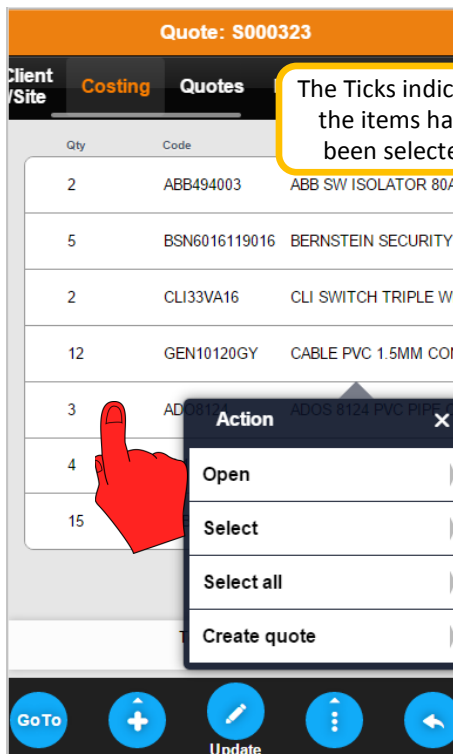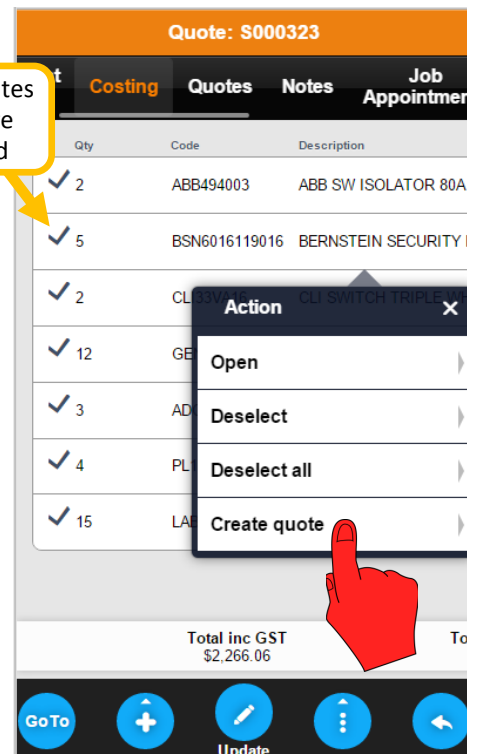

After you have selected the items for your quote tap again select Create quote.
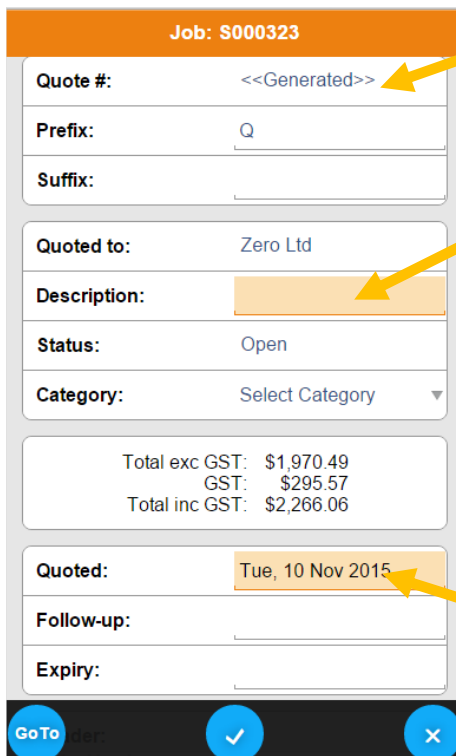
SmartTrade will generate the quote number. You can change or add a prefix or suffix to the generated quote number.

Add a description, this description is only an internal note and will not be printed on the actual quote.

The header and footer fields allow text to be added to the quote. The header appears below the address. The footer appears at the bottom of the quote.

The quote date will default to todays date but can be changed. You can also add Follow-up and Expiry Dates.
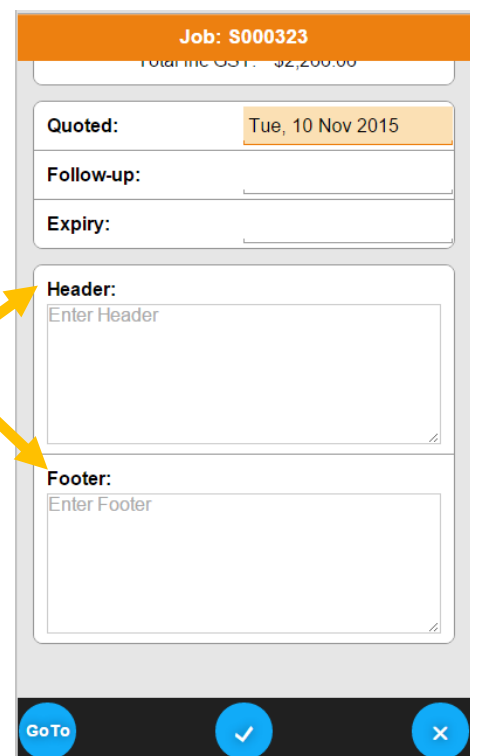
Previewing, emailing and accepting a quote

After the quote has been created and saved, the quote can be previewed or accepted.

Job: S000468

Quote #:	000204
Prefix:	Q
Suffix:	
Quoted to:	A-Z Stationery Supplies
Description:	fix Motor
Status:	Open
Category:	Select Category ▼

Total exc GST: $963.42
GST: $144.51
Total inc GST: $1,1_7.93

Actions ✕

Accept ▸   Feb 2016
Email ▸
Preview ▸

Tap the Actions button to access the Accept/Email/Preview menu and select the option you want.

Preview quote

Quote # Q000151
Date 11 Nov 2015
To Zero Ltd
Job # S000323
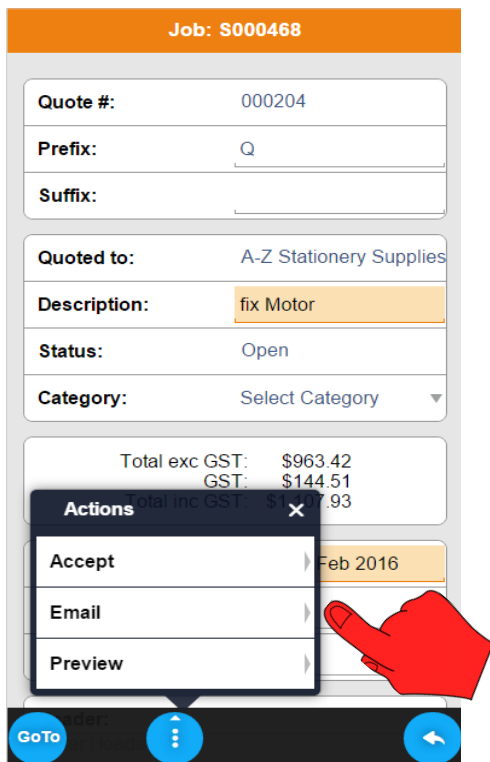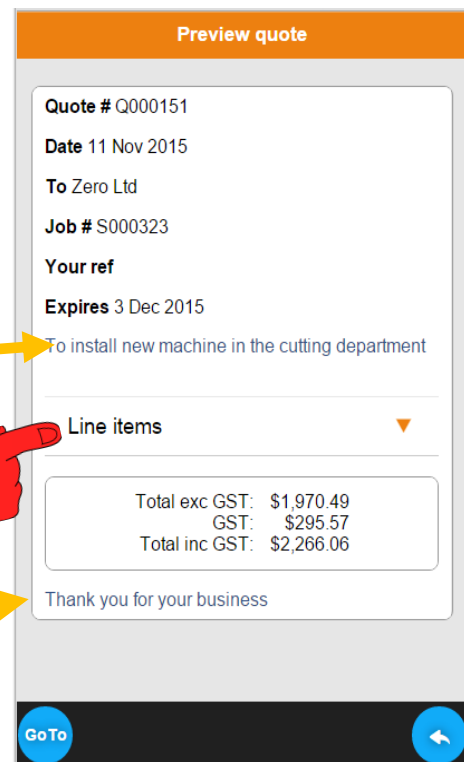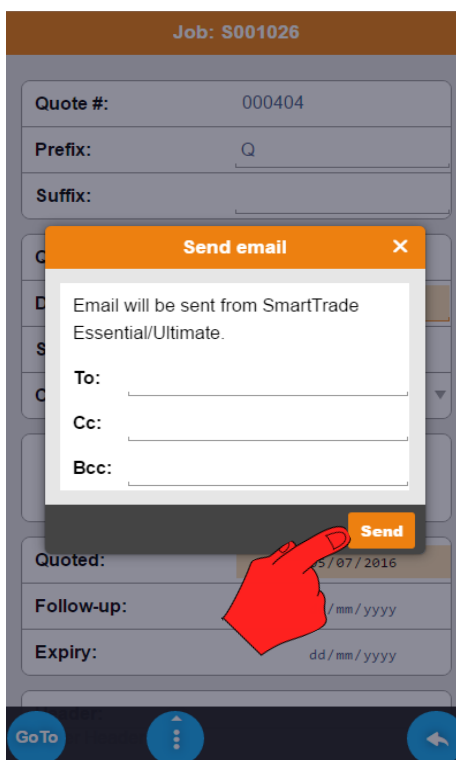**Your ref**
Expires 3 Dec 2015
To install new machine in the cutting department

Line items ▼

Total exc GST: $1,970.49
GST: $295.57
Total inc GST: $2,266.06

Thank you for your business

The Header →

Tap here to see the line items.

The Footer →

Previewing the quote.

Job: S001026

Quote #:	000404
Prefix:	Q
Suffix:	

Send email ✕

Email will be sent from SmartTrade Essential/Ultimate.

To:
Cc:
Bcc:

Send

Quoted: 5/07/2016
Follow-up: /mm/yyyy
Expiry: dd/mm/yyyy

Emailing the quote.

The quote will be emailed from SmartTrade Office next time you sync.

Accept quote for job: S000323

Accepted via Digital signature ▼

Quote # Q000151 dated Tue, 10 Nov 2015 accepted on behalf of Zero Ltd by

▼ Type name or select contact

Clear

Select from the drop down menu how the quote was accepted.

Select or type in the name of the person accepting the quote.

Capture the client's signature.

Accepting the quote.