



SmartTrade New features and functions

Essential/Ultimate

1. Accounting interfaces:

- Heading line items can now be exported to Xero.

2. Clients:

- Find Clients screen has a new “Search/open” button.
- Add/Update Client form has 2 new date fields and a new layout.
- Client Groups: Have a new default for new clients: Stop credit flag.

3. Preferences:

- Employee Schedule Preferences. Global reminder option removed.

4. Employee Schedule:

- Appointments can now have reminders set on individual appointments with their own appropriate reminder interval. All new appointments will default to none for its reminder interval.
- Jobs menu to have a new “Select activity...” menu.
- Show the assigned timesheet activity on schedule’s green bar.
- Employee Schedule Preferences to have new options to sync Google Calendar more frequently.
- Ability to re-size and hide the side panels.
- “Jobs to Schedule” grid now includes a Workflow Status column and Search by Date fields.
- Employee Schedule Preferences: New field available for job details - & siteid.
- Ability to dispatch one job using right-click option.
- Google interface: Add the first 256 characters of Job Initial Note to Note details in Google Calendar.

5. Jobs:

- Allow Person Responsible and Workflow Status to be edited in Office for a dispatched job (no longer need to force the job back first).

- NEW Job Pictures sub-tab on the Docs tab.
- Duplicate Job screen has a new option to “Keep pictures”.
- Find Jobs: Ability to bulk force back jobs from mobile. **NOTE:** *After bulk forcing back jobs, please refresh the Find Jobs grid by clicking Search again.*
- Find Jobs screen has a new “Search/open” button.

6. Sub-jobs:

- Ability to create sub-jobs. They are a complete stand-alone job, but can share the same job number + a unique identifier for each sub-job. To create a sub-job, edit the job and click Other action => Create sub-job

7. Orders:

- When creating Order from Job Sheet, new ability to choose a different supplier to create a single order using all line items for.
- Find Orders: Add “Smeedi Upload” button and include Smeedi Status in the grid
- Find Orders: Add new Search by Supplier Group field and a new grid column for Supplier Group
- Order Add/Edit: Add “Smeedi Upload” option

8. Supplier Invoices:

- When deleting a Supplier Invoice, display a warning if any line items have been posted to the job
- Add/Update Supplier Invoice: Add payment terms, calculate the due date, and display Approval fields (only populated by Smeedi)
- New option for importing L&H supplier invoices in the new CSV layout (old TXT layout option is still available)
- Find Supplier Invoices: New Search by Approved date and Person Responsible fields
- Add Supplier Invoice: Display warning when job chosen and it has a final invoice.
- Importing supplier invoices where the product code matches one in MyData will assume the MyData item’s description and overriding sell pricing.
- A new message appears at the end of the report if any supplier invoices have been imported for jobs that have already had a final invoice created.
- Import Supplier Invoices: Calculate the Invoice Due Date using the supplier’s payment terms.

9. Suppliers:

- Supplier Groups are now available
- Add/Update Supplier: New layout for Details tab to include three new fields

- Suppliers Preferences: New default fields for Payment Terms and Supplier Group
- Find Supplier Invoices. Added a Total inc GST column to the grid
- Find Suppliers: New Search by Supplier Group field
- Find Suppliers screen has a new “Search/open” button.
- Supplier Payment Terms can now be set up, and includes new options for an Approved Date calculation of the due date (only available for Smeedi users).

10. Timesheets:

- Timesheet Activities to include a new option to show in the job schedule list for adding an activity to a job schedule
- Find Timesheets: A new Approved Y/N column has been added to the grid. Add new “Other actions” to approve or unapproved single/bulk timesheets. This simply sets or unsets the approved flag and does no other checking.

11. Invoices:

- Ability to now archive customer invoices independently to a job. This is useful if you have a recurring job template and you don't want to archive the job, but do want to archive the recurring invoices once they have been exported/paid.
- Find Invoices: New right click menu to bulk archive/unarchive invoice(s)
- Find Invoices screen has a new “Search/open” button.

12. Quotes:

- Find Quotes: New Search by other field of Accounting Group
- Ability to unaccept a quote. This will allow you to change the quote before accepting it again, or accept a different quote.
- If a quote is accepted on a mobile device and a signature captured at the time, the Quote Report in office can now print the signature on the quote.

13. Employees:

- New default Timesheet Activity field for job schedules.

14. Price Requests:

- Find Price Requests: New Search by Supplier Group field and new column added to the grid.

15. Login Page:

- Has a new tab showing support information

16. SmartBiz:

- New Management Report: Van Stock Report
- New Management Report: Item Tracking Report
- New Notes Report in the Management Reports section.

17. Reports:

- Quote Report, Invoice Report and Job Sheet Report – new sub-report to print Pictures from the Job Pictures tab
- Customising Client Summary reports with a Client field tree now includes the OnStopCredit field.
- Customising any report with a client now includes 4 x preference fields for invoice send method
- Customising Supplier Summary reports with a Supplier field tree now includes the Payment Terms and Supplier Group fields.

18. Mobile interface:

- Jobs with unaccepted quotes can now be dispatched to mobile. This means you no longer need to change the job to a Charge-up before dispatching and change back to Quote on return. The job can be set up properly as a Quote and remain as a Quote.
- New “IsDispatched” column on Job Card in SmartTrade v6 to show which employee(s) still have the jobs on the device(s)

Mobile

1. Jobs

▪ Job List

- New orange button for Site Map; remove action to show site in map
- Always opens with a Search panel
- Add new sort option: "Job # (ascending)"
- Display client/site main phones if there are no contacts set up for the job/client/site. If the client/site has multiple contacts, you are now able to view them all from a new Contacts tab for the client/site. Note; for this release you are able to just view the contacts. In a future release we will add the ability add and edit contacts as well.
- Menu in top header removed and replaced with a new Search/filter menu. The menu has a new option to show just the new jobs.

- ALL 'List' pages (Job list, Client list, Order list) - remove the > icon to open the item and replace with pointer to right of item indicating that it can be opened by tapping anywhere on the item (not just on the pointer).

- **Job Card**
 - Occupant information on Jobs can now be seen on mobile
 - Mobile Job Card now has a new accordion section for a better layout look and a new field for estimated job duration
 - The Update Job page has a new Actions button with 3 actions meaning you don't need to go back to the Job List first. The blue action button is at the bottom of ALL the Update Job tabs, so the job can be returned, reassigned, or an invoice requested wherever you are, e.g. on job notes tab, or on job details tab, etc.
 - Add Job page: Added a Search Client button to search for and download a Client that is not currently on your mobile device.
 - Job page; replace icons with words.
 - Job page; remove Create Invoice icon from Job Sheet and add the option to Job's Actions pop-up.

- **Job Sheet**
 - KitSet child details are synced to mobile, which means KitSets without a fixed sell price can be added to jobs on mobile and the sell price will be calculated. NOTE: You cannot see the KitSet child items on the mobile job sheet.
 - Job Sheet tab has been simplified to show only one row per line item. There is a new action button on the Job List page which will let you show costs from the totals under the job sheet line items. While you are on the Job Sheet page you can quickly hide the costs and profit. This is useful if you want to show your customer the sell totals only.

- **Job Pictures**
 - Photo capture for Jobs.
 - New Map button

- **Return Jobs**
 - New "Return Jobs" page where all the mandatory and optional checks are displayed. In this example, the first job cannot be returned because the Mobile Preferences in office say that a Signature MUST be added before the job can be returned. The other warnings can be ignored by the mobile user. The second job cannot be returned because the Timer

is still running for it. Tap the new “Open job” button to open the job directly and add the signature or stop the timer.

2. Clients & Sites

- Ability to **Find Clients that are not currently on your mobile device** and download them to your device. This would then allow you to add a new job for the client and/or view all details for the client including notes and customisable fields. If a client is downloaded to your mobile device, ALL the sites for the client will be downloaded. Each client has an action to allow you to no longer keep the client on your mobile device, e.g. if you only downloaded it temporarily to view some details for it.
- New orange ‘pin’ buttons for each client and site
- Client list; change layout and add buttons to be consistent with Job List.

3. Calendar

- **Calendar/Job Appointments** to use new user preferences for layout. Like Employee Schedule Preferences in office, EACH mobile user can set up the Job Appointments list to display the job details how they like; e.g. as little or as much information as they need. To change what is displayed, GoTo Settings and tap the Appointments accordion. Tap on to explain what to do.
- Calendar; add Today button.

4. Quotes

- Ability to Create new Quote jobs on your device, or dispatch existing Quote jobs to your device that either have or don't have an accepted quote. The Add Job page on mobile asks if you want to add a Quote job or a Charge-up job.
- Ability to Add/ Edit / Delete Costing line items for a Quote job.
- Ability to create a new Quote on mobile.

5. Orders

- Order List – always opens with a Search panel

6. Suppliers

- NEW Suppliers List to view all information about your suppliers

7. Timesheets

- Timesheets can be posted on mobile to jobs that don't have an accepted quote yet.

8. Assets

- Asset List: Location is shown for each asset.
- Assets list; change layout and add buttons to be consistent with Job List.

9. Menus

- A new GoTo menu that can be swiped open from anywhere and will help the user move to the next action. The GoTo menu can also be opened by tapping the blue GoTo button at the bottom left of every page. The GoTo menu shows counter of NEW jobs only; as soon as you open the job it will no longer be considered new. The GoTo menu shows if there is any Timer currently running. The GoTo menu allows you to sync immediately by tapping  the icon.
- Add Home button in the left top corner.
- Change Dashboard to Home and remove icons.
- Top of every page and GoTo menu will show you that there is a **timer running**. Tap on either symbol to open the currently running timesheet so you can stop it.

10. Service/Synchronisation

- Additional security functionality added to the service and synchronisation.
- Encrypt passwords
- Only **sync Job/Client/Site notes** to mobile that are flagged in office as to be visible on mobile. When this version of mobile is released, ALL notes will be flagged as to be visible on mobile. It will be up to the user in office to set individual notes to be not visible as required.
- Provide the user an indication that sync is still happening, and also display how long ago the last sync was successful. This is shown on the GoTo menu.

11. MISC UI changes

- To reduce clutter, to standardise the look of pages, to reduce the number of ways you can do the same thing:
 - All phone number buttons are 'active' – tap on them to ring that number.
 - All email buttons are 'active' – tap on them to open a new email.
 - All other pages have been improved and standardised: Add/Edit Order, Add/Edit Schedule, Asset list, Add/Edit Signature, Add/Edit Client, View Work Orders, Invoice Request, Add/Edit Timesheet, Add/Edit Appointment, Add/Edit Line Item.
 - Change the icon of accordions from “+” to arrow.

12. Settings, Hints & Tips, Support

- Improved Settings page, and Hints & Tips page. Support tab shows mobile OS and browser.
- Settings, Hints and tips and Support and tools pages have separate sections to reduce the long lists into smaller accordions, and add helpful notes for some of them.
- New setting to turn on or off Auto-sync. If this is On, mobile will attempt to sync every 15 seconds. If this is Off, mobile will only sync when you manually choose The sync option from the GoTo menu.

SmartForms

1. Password reset function for Forms4Mobile for users who have access to SmartTrade v6
2. All forms linked to a job, or linked to an asset which is linked to a job can have any or all of the following 'flags'. These flags are maintained in the office. Forms that are not applicable will not be sent to the mobile devices. The flags are:
 - Form is mandatory
 - Form will pop-up when the job is opened on the mobile device
 - Form is not applicable for this job.
3. Job List: Open a job that has a non-signed off form flagged as a 'pop-up' and open the form immediately. This is useful if you have a form on a job that is a Site Safety check, and this form must be completed before any work is started on the job.
4. Job Asset List: Open an asset that has a non-signed off form flagged as a 'pop-up' and open the form immediately.
5. Update Job/Asset Forms List: Show mandatory forms at the top of the list and with a red border. Forms that have been set in office as being not applicable for this job will not appear in the forms lists any more.

Thank You