

A guide to working with SmartTrade Mobile



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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	_ = ×	
d e	Company Code	Jobs list to show	
e e	Sync all client details to mobile Before a job is returned the following will be checked		
:	Job note added Mandatory SmartForms signed off	No check necessary	

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.

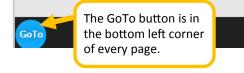
To learn more about the new SmartTrade Mobile, view these short presentations (download as PDFs). <u>Overview</u> (includes a list of new features) <u>Jobs</u> <u>Clients</u> Forms

Home

We're excited about the martTrade Mobile, and look forward to receiving your feedback.

📩 feedback@smarttrade.biz

The team at SmartTrade



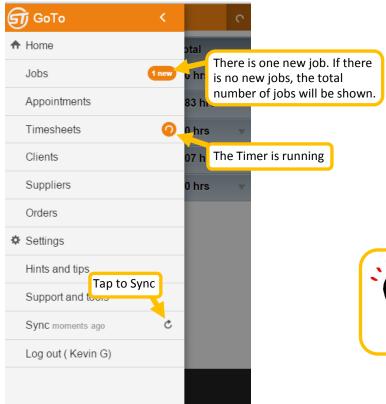


After you log in leave your browser open and SmartTrade Mobile running. This means you will be able to work offline if you don't have an internet connection.

The 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.



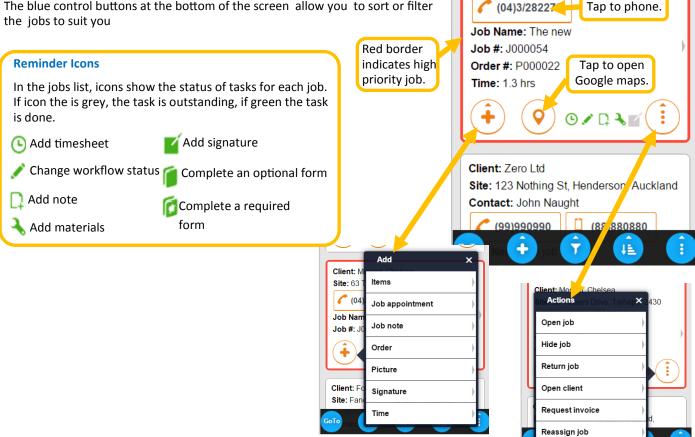
The Jobs List

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.

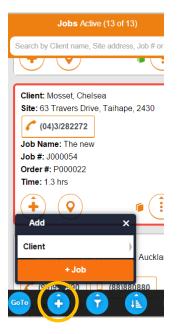
By using the Add or Action buttons on the job you can easily access the different areas of the job.

The blue control buttons at the bottom of the screen allow you to sort or filter



The Add Button

Add a client or job



The Filter Button

Use to show only the jobs you want to see.

Jobs Active (13 of 1	
rch by Client name, Site addres	s, Job # or Job
ient: Mosset, Chelsea te: 63 Travers Drive, Taihap (04)3/282272	e, 2430
ь #: <u>Filter</u> 054	×)
Show Active (13)	•
Show All (13)	0
Show Hidden (0)	
e Show New (0)	O
Show Returning (0)	0

The Sort Button

Select the criteria for how the jobs are sorted.

Jobs Active (13 of 13)				
rch by Clie	Sort by	×		
	City	\bigcirc		
	Client Name	\bigcirc		
i ent: M os t e: 63 Tra	Job #	•		
(04)3/2	Job # (ascending)	\bigcirc		
• b Name : • b #: J000	Job Due Date	0		
der#:P0 me:1.3 h	Next Appointment Date	\bigcirc		
$\widehat{\bullet}$	Postcode	0		
	Priority	\bigcirc		
ent: Zero e: 123 No	Site ID	\bigcirc		
ntact: Jo	Suburb	0		
• (99)990 • Na 🗘		:		

The Actions Button

Jobs Active (13 of 13)

Search by Client name, Site address, Job # or Job n

Site: 63 Travers Drive, Taihape, 2430

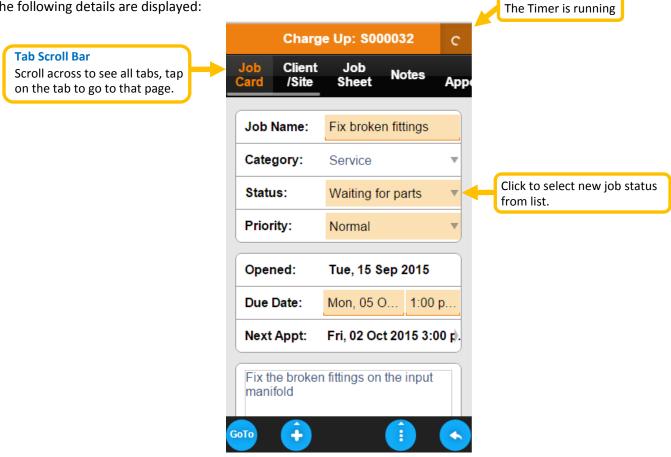
Client: Mosset, Chelsea

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

Jobs Active (13 of 13)			
ch by Client name, Site address, Job # or Job n			
ent: Mosset, Chelsea xe: 63 Travers Drive, Taihape, 2430 (04)3/282272			
b Name: The new b #: J000054 der #: P000022 ne: 1.3 hrs			
Actions x			
e: 123 Not ntact: Joh Show costs			

The Job Card

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

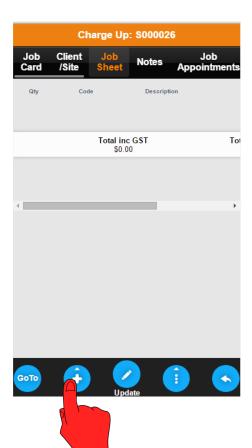


The Client/Site

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

Quote: J000001	
Job Client Job Notes Job Card /Site Sheet Notes Appointm	
Client	Tap to view client details.
Footloose Dance Studio 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	
GoTo + (09)9875689 (021)852963	

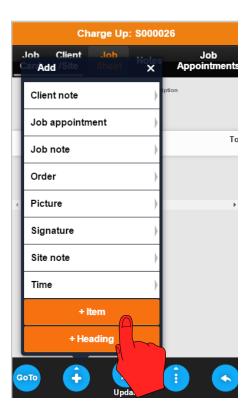
How to add an item to the job sheet



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 <u>+Item</u>.

The Find MyData Item page will open.

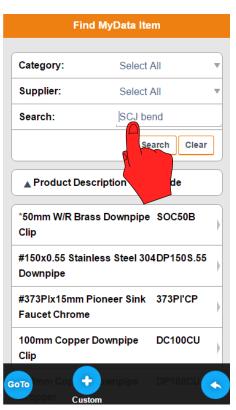
NOTE — You can access the Add menu from anywhere in the job by simply tapping the plus button. When you open the Add menu from the Job Sheet the items relating to that page will be highlighted in orange, if you open the Add Menu from another page +<u>Item</u> and +<u>Heading</u> will be in the alphabetical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

Find My	/Data Item
Category:	Select All 🔹
Supplier:	Select All Cable
Search:	Elbows, Bends Labour Pipe Spoul and Downpipe Swite
▲ Product Descript	Taps hower
*50mm W/R Brass D Clip	ownpipe SOC50B
#150x0.55 Stainless Downpipe	Steel 304DP150S.55
#373Plx15mm Pione Faucet Chrome	eer Sink 373PI'CP
100mm Copper Dow Clip	npipe DC100CU
	mpipe DP100CU



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.

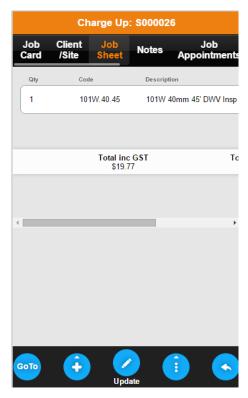
	Find MyDa	ta Item
Categ	ory: S	elect All
Supp	lier: S	elect All
Searc	h: Add Line Item	CJ bend
	Quick Add	lear
▲ Pr	Add	÷
101W SCJ E	40mm 45' Dy Bend	101W.40.45
101W SCJ E		sp 101W.40.88
101W SCJ E		sp 101W.50.45
101W SCJ E		sp 101W.50.88
ото	65mn + VV In Rend Custom	sp 101W.65.

Add Line Item				
Category:	Spouting and Downpi			
#150x0.55 Stainless Steel 304 Downpipe				
Code:	DP150S.55			
Supplier:	Plumbing World			
Quantity:	1			
Unit:	m			
Cost Type	Materials			
Unit Cost:	\$ 54.5600			
Unit Trade:	\$ 58.5100			
Gross Unit Sell:	\$ 81.91			
Discount (%):	0.00			
Unit Sell:	\$ 81.91			

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

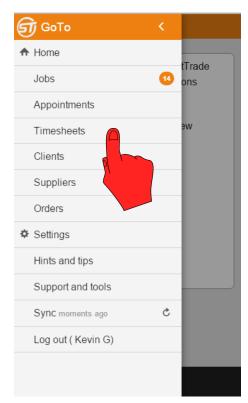
Tap on the blue **Custom** button and blank Add Line Item page will open and you enter the details of the item.

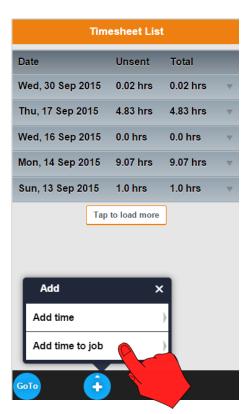
Find I	MyData It	em		
Category:	Select	All		
Supplier:	Select	All		
Search: Search				
	s	earch	Clear	
▲ Product Descr	iption	Cod	e	
*50mm W/R Brass Clip #150x0.55 Stainle: Downpipe)
#373Plx15mm Pio Faucet Chrome	neer Sink	373F	PI'CP)
100mm Copper Do Clip	ownpipe	DC1	00CU)
Custom	ownpipe	DP1	00CU	•



Timesheets

From the GoTo menu select Timesheets, this will take you the Timesheet List, tap the blue Plus button to add time.

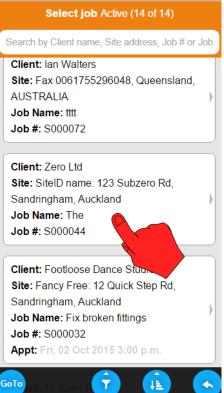




When you tap the Plus button an "Add" dialog box will pop up and you will have two choices

- 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 +0.1h	r +1hr -1hr			

Select the Activity for the entry.

Rd,	Ç)
shop		
shop		
		/
ır - Tı	adesma	an
07 O	ct 2015	
ı.m.	NOW	
um.	NOW	
	-1hr	
s	-1hr	
	S 1hr	

Tap the Start button to start the timer.

Timesh	eet 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
max 254 chars;	0 used so far
Start	

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

Tim	esheet	Entry	3
SiteID name: 12 Sandringham, A			Q
Zero Ltd S000044 - The			
Activity:	W	/orkshop	
Chargeable:			\checkmark
Labour Rate:	La	abour - Tr	adesman
Date:	N	/ed, 07 O	ct 2015
Start:	_1:	43 p.m.	NOW
End:	1:	43 p.m.	NOW
Duration:	0.	0 hrs	
-0.1hr +0	.1hr	+1hr	-1hr
Stop			

Tap the Stop the timer and record the time.

Timesheets— using Start/Finish times to enter the time

Timesheet Entry				
SiteID name: 123 S Sandringham, Auck				
Zero Ltd S000044 - The				
Activity:	Workshop 🔹			
Chargeable:				
Labour Rate:	ate: 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 +0.1h	r +1hr -1hr			

Select the Activity for the entry. Note: the date will default to today.

Timesheet Entry				
SiteID name: 123 Subzero Rd, O				
Zero Ltd S000044 - The				
Activity: Workshop v			•	
Chargeable	hargeable: 🗸			
Labour Rat	r Rate: Labour - Tradesman™			
Date:		Wed, 07 O	ct 2015	
Start:	L	7:30 a.m.	NOW	
End:	L	8:30 a.m.		
Duration:	Duration: 1.0 hrs			
-0.1hr	+0.1hr	+1hr	-1hr	
GoTo O X				

Tap on the Start and End times to change them.

Timesh	eet 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;	
GOTO IT TO JO O AT	 ×

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

'orkshop abour - Tradesm 'ed, 07 Oct 2015
abour - Tradesm
abour - Tradesm
ed, 07 Oct 2015
30 a.m. NOW
30 a.m. Now
0 hrs
+1hr -1hr

Tap the Tick button to save and record the time.

Timesheets— using Duration to enter the time

Jobs				
Orders				
Appointments			•	
Timesheets			•	
⑦ Help	-	•		nis Help explain Ich entry type
Entry Type:	By Duration			
Calculation:	Duration = End -	Sta	(
Calculation: Default interval:		Sta	-	
	0.10 hour units		-	

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.

Times	heet Entry
SiteID name: 123 S Sandringham, Aucl	
Zero Ltd S000044 - The	
Activity:	Workshop 🔻
Chargeable:	\checkmark
Labour Rate:	Labour - Tradesman
Date:	Wed, 07 Oct 2015
Duration:	1.0 hrs
-0.1hr +0.1h	ır +1hr
Enter Note	
GoTo	

Tap on Duration to enter the duration.

Times	heet Entry
SiteID name: 123 Sandringham, Auc	
Zero Ltd S000044 - The	
Activity:	Select Activity
Chargeable:	
Labour Rate:	oour - Tradesman
Date:	Wed, 07 Oct 2015
Duration:	1.0 hrs
-0.1hr +0.11	hr +1hr -1hr
Enter Note	
БоТо	

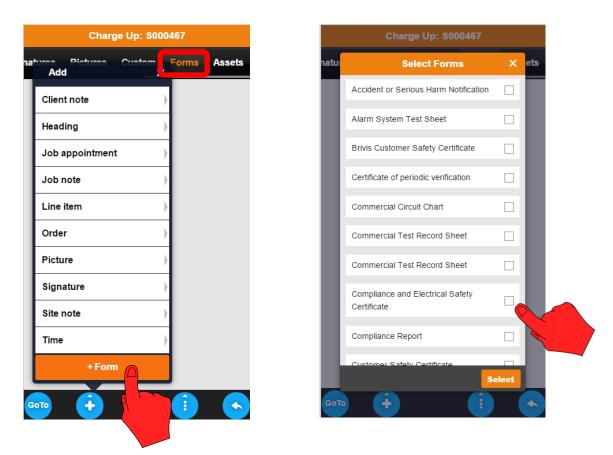
Select the Activity for the entry. Note: the date will default to today.

Timesheet Entry		
SiteID name: 12 Sandringham, Au		
Zero Ltd S000044 - The		
Activity:	Workshop 💌	
Chargeable:	\checkmark	
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.

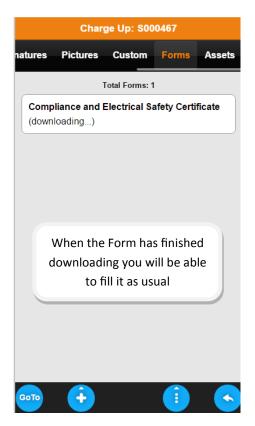
Adding Forms to a job

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.

	Charge Up: S000467	
natu	Select Forms	× ets
	Accident or Serious Harm Notification	
	Alarm System Test Sheet	
	Brivis Customer Safety Certificate	
	Certificate of periodic verification	
	Commercial Circuit Chart	
	Commercial Test Record Sheet	
	Commercial Test Record Sheet	
l	Compliance and Electrical Safety Certificate	☑
	Compliance Report	
	Customer Safety Certificate	lect
GoTo		•



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.

Asset - Duck tesing	Site ID and Address*
	▼ 12 Kathleen St, Broadbeach, Gold Coast, QLD ▼
<mark>u Details Notes F</mark> or	
в	▼ 10 th floor
Asset Type:	
A Split A/C Ductless	Distributor (supplier)*
<u>s</u>	X MARINE
B Make: F Eniitsu	Model* ▼ CoolAir5000
Model:	Service Manual URL https://www.dropbox.com/s/aqmp0d9igwtodc4/SM-V6.0-Users%20Guide%
CoolAir5000	
Model #:	On the Asset there is a special
- 898965653232	field which allows the web
Serial Number:	URL link to be added to the
asdasd	asset. You type in the web
Service Manual:	address or copy and paste the
https://www.dropbox.com/s/agmp0d9igwtodc4/5	link into this field
https://www.dropbox.com/s/admpod/sigwtodc4/s	
ID / Barcode #:	
НННН	<u>S</u> ave
Status:	

Update Job: S000769 - Demo Test Company - exit light

Reports	Job Card Docs	Customise Unlock To customise a new field, click Customis To customise Unlock To re-arrange fields, click Unlock. Drag in then click Apply Changes.	
she	Docs Schedule Job Detail Signatures Assets Custom 1 TeletracNavman	then click Apply Changes. Select Customisable Field (45) Search by Description Add New Customisable Field Description Web Link Type 01-Jar 02-Fe Description CL C	
		05-Mit Currency 04-April Date 05-May List 06-June Phone Number 07-July Textbox 08-Augt Currency 09-Sept URL 10-Octo	<u>C</u> lose

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

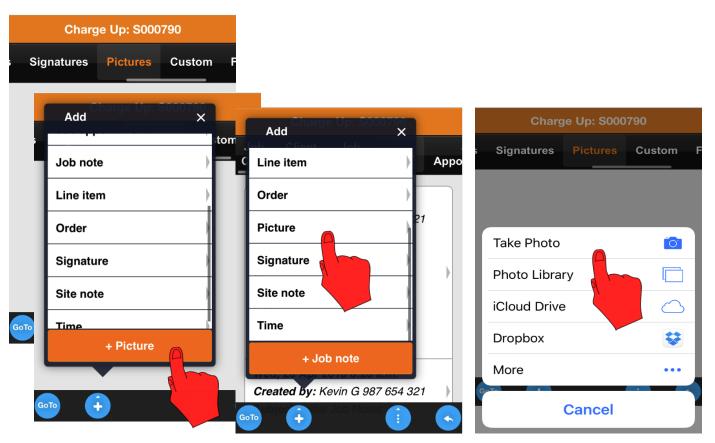
From within a job click on the Custom¹ tab, this will take you the Custom Fields window. Now click the Customise² button this will open the "Select Customisable Field" window. Click the Add³ button to open the "Add New Customisable Field" window. Type in the name you wish to use in the Description field and select "URL" from the Type field. Click Save⁴.

To add the field to the job highlight the field name and click Select⁵. 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.

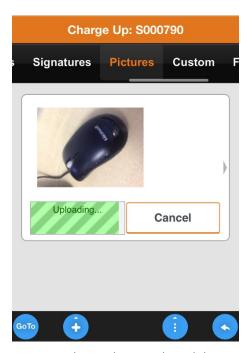
Note: These instructions show adding a link to a job, but links can be also added clients and sites.

Photos

You can add photos to a job by using the camera or from a photo library on your mobile device.

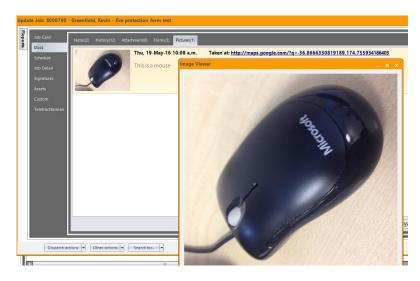


To add a photo to the job tap on the blue plus button this will bring up the Add menu and now select +Picture . Note: You can do this from any page in the job Select how you wish to add the photo to the job, either by taking a photo or adding it from another source.



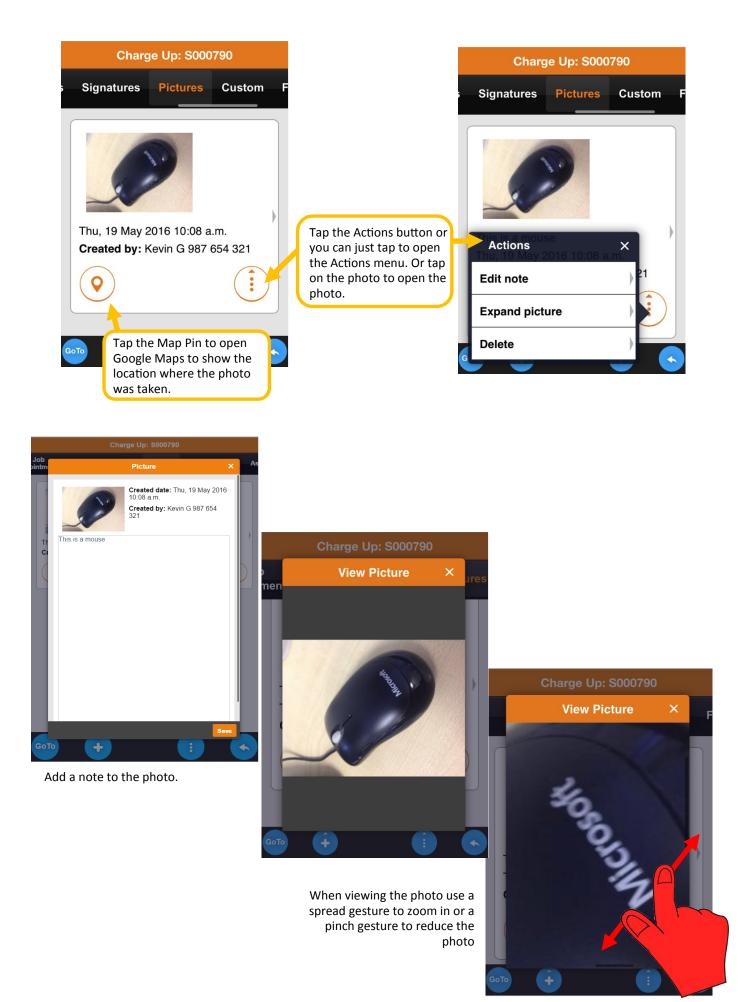
Once you have taken or selected the photo, the photo will be uploaded to the job.

When the photo has uploaded you can add notes to it.



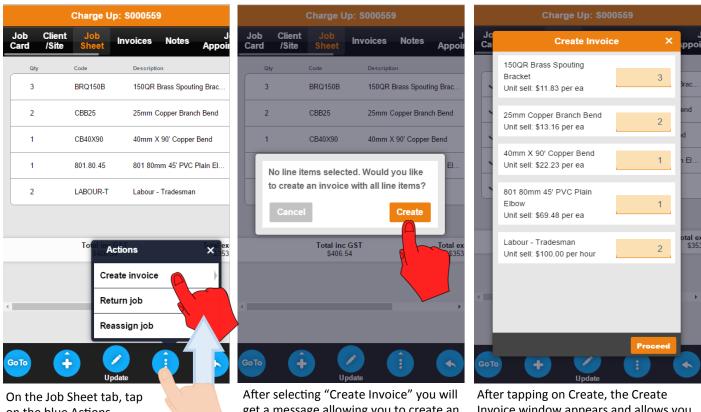
The photo will also available on the job in SmartTrade in the office and for any other user who has the job on their device.

Photos





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



on the blue Actions button and select Create Invoice.

get a message allowing you to create an invoice with all items on the Job Sheet.

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.

		Charge U	lp: \$000559)			Charge Up:	S000559			Charg	e Up: \$0005	59	
Job Card	Client /Site	Job Sheet	Invoices	Notes	, ppoi	Job C Card	The Ticks i		Jotes Jotes Appoir	Job Cli Card /S	ent Job ite Shee		Notes	J Appoir
Q	ty	Code	Descriptio	on		Qty	which iter			Qty	Code	Descrip	tion	
3		BRQ150B	150QR	Brass Spouting I	Brac	3	been sel	ected	Spouting Brac	3	BRQ150	IB 150QF	R Brass Spoutin	ig Brac
2		CBB25	25mm (opper Branch B	end	✓ 2	-вВ25	25mm Copp	er Branch Bend	✓ 2	CBB25	25mm	Copper Branch	n Bend
1		CB40X90	40mm X	90' Copper Ber	d	√1	CB40X90	40mm X 90	Copper Bend	✓1	CB40X9	⁰ Actions	X 90' Copper E	×
1		801.80.45	801 80n	nm 45' PVC Plai	n El	1	801.80.45	801 80mm	45' PVC Plain El	1	801.8	Open		•
2		LABOUR-A	ctions	Tradesman	<	✓ 2	LABOUR-T	Labour - Tra	idesman	✓ 2	LABC	Deselect)
		Op	en									Select all)
		_	lect		es 35:		Total inc G \$406.54	ST	Total ex \$353		Tot	Create invoic	e) ex
4			eate invoic))								pl	
						4			*	1				
Go To	•		P	•	•	GoTo	÷ /			Go To	•	Update	1	

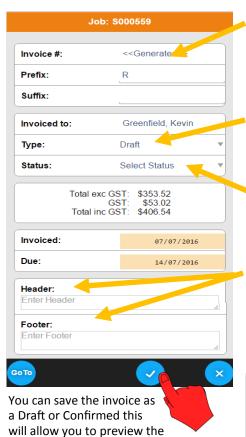
On the Job Sheet tab, tap on the items grid to bring up the Actions menu from here you can select individual items or all the items to be invoiced.

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





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



Job: \$000559

Invoice #:	000200 Confirmed
Prefix:	R
Suffix:	
Invoiced to:	Greenfield, Kevin
Status:	Select Status
GS	ST: \$353.52 ST: \$53.02 ST: \$406.54
Invoiced:	26/07/2016
DueActions	× 02/08/2016
Customer Sign-off	•
Email	•
Preview	•
Preview	



Inv	oice #:	000200	Signed
Pre	efix:	R	
Su	ffix:		
Ir		Send email	×
S		will be sent from SmartTrade ntial/Ultimate.	
L	To:	Kevin@smarttrade.biz	
	Cc:		
Ir	Bcc:		
D		S	end
	ader:		
io To			

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

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

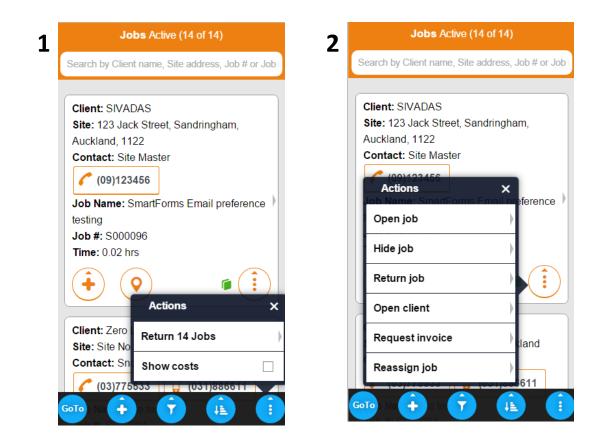
	Preview in	voice
ob # S00 bate 8 Jul our ref o Greenfi ue 15 Jul	0559 2016 eld, Kevin	
Line ite	ems	
Qty	Code	Description
3	BRQ150B	150QR Brass Spout Bracket
2	CBB25	25mm Copper Brand
1	CB40X90	40mm X 90' Copper
1	801.80.45	801 80mm 45' PVC Elbow
2	LABOUR-T	Labour - Tradesman
4		•
	Total exc GST:	\$353.52
	GST: Total inc GST:	\$53.02 \$406.54
го		

The client can be shown a preview of the invoice.

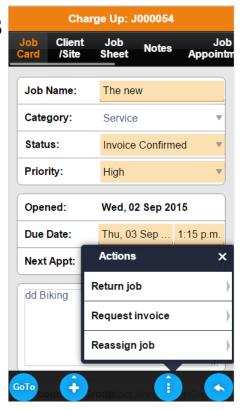
Returning Jobs

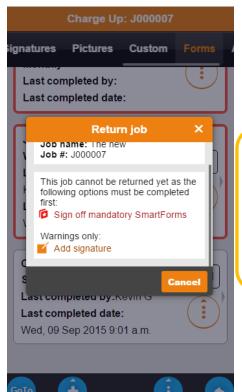
When you have finished with the job it must be returned to the office. The job can be returned from several places:

- 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.



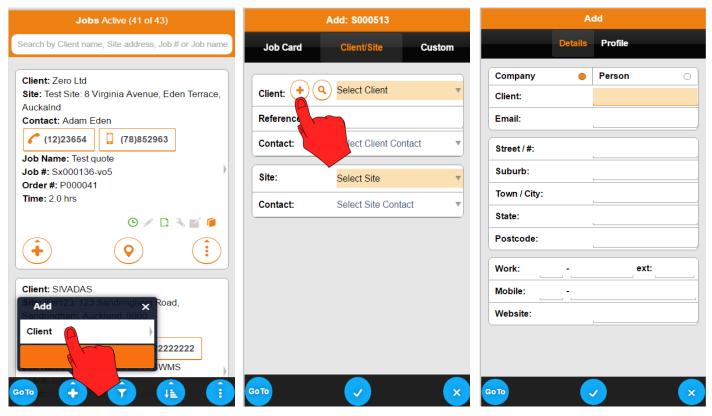






NOTE — Depending on the preferences set in the office you may get warnings or be restricted from returning the job until certain actions have been made.

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

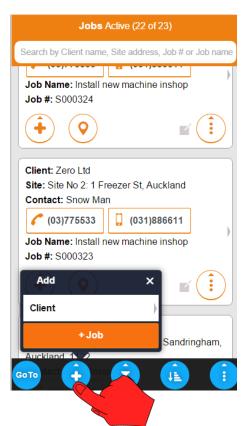
	Add: \$000513			Client: W	ayne, Mr .	John				Add Site	
Job Card	Client/Site	Custom	Details	Contacts	Sites	Notes	Profile	D	etails		Profile
Client: 🔶 🭳	Wayne, Mr John	•	Title:		Mr		•	Site ID:			
Reference:			First Na	me:	John			Street / #	.	1 The E	nd
Contact:	John Wayne		Last Na	me:	Wayne			Suburb:	-		
contact: John W			Email:		John@	wayne.c	om	Town / C		Boothill	
(08)123654	(04)852963		Street /	#:	123 We	st St		State:		WW	
🐱 John@way	/ne.com		Suburb	:				Postcod	e:	1234	
site: (+)	Select Site	•	Town / (City:	Dodge	City		Work:	01 -	123654	ext:
ontact	Select Site Conta	ct 🔻	State:		WW			Mobile:	04 -	874125	
			Postco		1234		,	Website			
10		×	Add Note Site		×	ext:		GoTo			

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

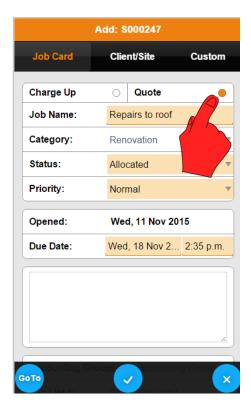
You add both charge-up and quote type jobs on SmartTrade Mobile.



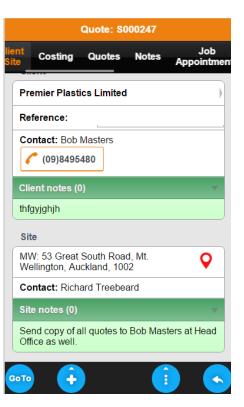
From the job list, tap on the Plus button and select Job.

	Add: \$000247	
Job Card	Client/Site	Custom
Client: 🔶 🍳	Select Client	
Reference		
Contact	Select Client Co	ontact 🔹
Site:	Select Site	
Contact:	Select Site Con	tact 🔻
30 TO		

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.



When the job card opens select the type of job you are adding. Fill in the job details.



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.

		Quote: S000)323						Quote: S00	0323			Qu	ote: S00	0323	
Job Card	Client /Site	Costing	Quotes	Notes	A	Client /Site	C	osting	Quotes	The Ticks indica		t Costing	G	Juotes	Notes	Job Appointme
Qty		Code	Description	1			Qty		Code	been selected	k	Qty	Code	•	Descrip	tion
2		ABB494003	ABB SW	ISOLATOR	80A		2		ABB494003	ABB SW ISOLATOR 80A	N	2	ABE	3494003	ABB S	W ISOLATOR 80
5		BSN6016119016	6 BERNSTE	EIN SECURI	ITY F		5		BSN601611901	BERNSTEIN SECURITY		✓ 5	BSN	N60161190	16 BERN	STEIN SECURIT
2		CLI33VA16	CLI SWIT	CH TRIPLE	WH		2		CLI33VA16	CLI SWITCH TRIPLE WH	•	✓ 2	CL	^{33V} Actio	n ^{CLI S\}	
12		GEN10120GY	CABLE P	VC 1.5MM (CONI		12		GEN10120GY	CABLE PVC 1.5MM CON	•	12	GE	Open		
3		ADO8124	ADOS 81	24 PVC PIP	E CE		3		ADD 812 Action		•	✓ 3	AD	Desele	ct	
4		PL15X902	20(15)x15	imm Pushlo	k Wii		4		Open	•	•	✓ 4	PL1	Desele	ct all	
15		LABOUR-T	Labour -	Fradesman			15		Select	Þ		✓ 15	LAE	Create	quote	
									Select a	II)					P	
		Total inc GS \$2,266.06	Т		Tot (Create	quote			Т	otal inc G \$2,266.06		
GoTo	÷	Update	Î			GoT	•	÷	Update	i s	Go	•		V pdate		

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.

Job: 3	S000323
Quote #:	< <generated>></generated>
Prefix:	Q
Suffix:	
Quoted to:	Zero Ltd
Description:	
Status:	Open
Category:	Select Category
Total exc G G Total inc G	ST: \$1,970.49 ST: \$295.57 ST: \$2,266.06
Quoted:	Tue, 10 Nov 2015
Follow-up:	
Expiry:	
oto der:	

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.

Quoted:	Tue, 10 Nov 2015
Follow-up:	L
Expiry:	L
Header:	
Enter Header	
	/
Footer:	
Enter Footer	

Previewing, emailing and accepting a quote

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

مل	b: \$000468		Preview quote
			Heview duote
Quote #:	000204		Quote # Q000151
Prefix:	Q		Date 11 Nov 2015
Suffix:			To Zero Ltd
			Job # \$000323
Quoted to:	A-Z Stationery Supplies		Your ref
Description:	fix Motor		Expires 3 Dec 2015
Status:	Open	The Header	Fo install new machine in the cutting department
Category:	Select Category		Line items
Total exc	c GST: \$963.42	Tap here	
Actions ^{Total inc}	GST: \$144.51 GST: \$1 40 7.93	to see the	Total exc GST: \$1,970.49
Actions		line items.	GST: \$295.57 Total inc GST: \$2,266.06
Accept	Feb 2016		
Email		The Footer	Thank you for your business
Preview			
	button to access the eview menu and select vant.		Previewing the quote.
p the Actions b cept/Email/Pre e option you w	eview menu and select [,] ant.		Previewing the quote.
o the Actions b cept/Email/Pre e option you w	eview menu and select		
o the Actions b cept/Email/Pre e option you w	eview menu and select [,] ant.	Select from the drop	Previewing the quote.
o the Actions b cept/Email/Pre e option you w Jo	eview menu and select vant. bb: \$001026	down menu how the	Previewing the quote. Accept quote for job: \$000323 Accepted via Digital signature
o the Actions b cept/Email/Pre coption you w Jo Jo uote #:	eview menu and select vant. bb: S001026 000404	-	Previewing the quote.
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p the Actions b cept/Email/Pre e option you w Jo Quote #: Prefix: Suffix: Email will be se Essential/Ultim To: Cc: Bcc:	eview menu and select vant.	down menu how the quote was accepted. Select or type in the name of the person accepting the quote. Capture the client's	Previewing the quote. Accept quote for job: S000323 Accepted via Digital signature Quote # Q000151 dated Tue, 10 Nov 2015 accepted on behalf of Zero Ltd by
p the Actions b cept/Email/Pre e option you w Jo Quote #: Prefix: Suffix: Email will be se Essential/Ultim To: Cc: Bcc:	eview menu and select vant.	down menu how the quote was accepted. Select or type in the name of the person accepting the quote. Capture the client's	Previewing the quote. 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
p the Actions b cept/Email/Pre e option you w Jo Quote #: Prefix: Suffix: Email will be se Essential/Ultim To: Cc:	eview menu and select vant.	down menu how the quote was accepted. Select or type in the name of the person accepting the quote. Capture the client's	Previewing the quote. 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

Emailing the quote.

GoTo

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

Accepting the quote.

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GoTo