

# SmartTrade

**Primer for SmartTrade Users  
beta testing the demonstration**

## **HVAC SmartForm A6 - Boilers**



## Background to this Primer

We have based the demo SmartForm on **Schedule A6—Boilers** on the Australian Institute of Refrigeration, Air Conditioning and Heating's [AIRAH] DA19 HVAC&R Maintenance Manual.

The demonstration SmartForm illustrates a number of the features and functionalities possible with electronic forms.

This primer comprises three parts:

**PART 1— Getting Going**

**PART 2 — Working with the A6 Boilers Demo SmartForm**

**PART 3 — Generating the Work Order in the office**

We have also prepared a companion [Primer for Working with SmartForms + Assets](#) for SmartTrade users who are not currently using SmartForms with Assets.

If you have any questions please do not hesitate to contact myself or the SmartTrade support team.

**Kind regards**

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- ⇒ Create work order notes
- ⇒ Signoff and return the SmartForm
- ⇒ Provide us with feedback

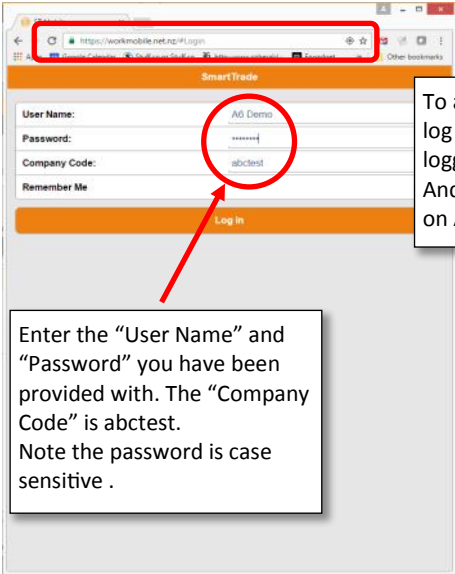
## **PART 3 — Generating the Work Order in the office**

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# PART 1—Getting Going

## 1.1 Logging into SmartTrade Mobile

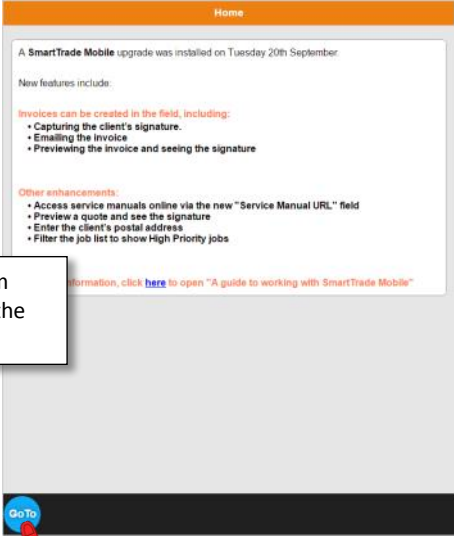


To access SmartTrade Mobile, you need to log into [workmobile.net.nz](https://workmobile.net.nz), if you are logging in on your desktop or with an Android device use Chrome as the browser, on Apple devices use Safari.

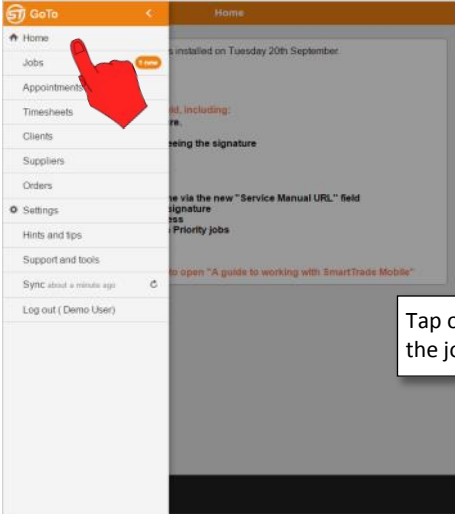
Enter the “User Name” and “Password” you have been provided with. The “Company Code” is abctest. Note the password is case sensitive .

The SmartTrade Mobile home screen, from here tap the blue “GoTo” button to go to the navigation menu.

## 1.2 Open the navigation menu



## 1.3 Open the job list



Tap on “Jobs” to open the job list window.

## (Getting Going cont.)

### 1.4 Open the job

Jobs Active (1 of 1)

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

Client: Demo Test Company  
Site: 12 Kathleen St, Broadbeach, Gold Coast, QLD  
Contact: Ian Wilson  
(09)8526363 (021)7418526

Job Name: Test - Boiler  
Job #: S001903-DEMO  
Due: Sat, 12 Nov 2016 16:20

Tap on the job to open it.



**Reminder Icons**—the icons show the status of tasks for each job. If the icon is grey the task is outstanding, if green the task is done. The two RHS icons are **Complete an optional form** and **Complete a required form**.



Add timesheet



Add signature



Complete an optional form



Complete a required form

### 1.5 Tab on the Assets tab

Charge Up: S001903-DEMO

Job Card Client /Site Job Sheet Notes Job Appointments Signatures Pictures Forms Assets

Job Name: Test - Boiler  
Category: Select Category  
Status: 2.0 SCHEDULED  
Priority: Normal  
Opened: Thu, 10 Nov 2016  
Due Date: Sat, 12 Nov 2016 16:20  
Next Appt: Mon, 12 Dec 2016 09:00

demo job for the A6 Boiler SmartForm

Please add your feedback

You can add comments here.

Accounting Group: Select Accounting Group  
Job List 1: Select Job List 1  
Job List 2: Select Job List 2  
Estimated hours: 0

When in the job tap on "Assets" in the menu bar, this will take you to the asset attached to this job.

### 1.6 Open the asset

Charge Up: S001903-DEMO

Job Card Client /Site Job Sheet Notes Job Appointments Signatures Pictures Forms Assets

Total Assets: 1

Asset: Raypak Atmospheric - Hot Water Boilers 507 115kw  
Location: Building A Rear Service Office

Tap on the asset to open it.

OR

Go straight to the SmartForms without opening the asset.

Charge Up: S001903-DEMO

Job Card Client /Site Job Sheet Notes Job Appointments Signatures Actions

Total Assets: 1

Asset: Raypak Atmospheric - Hot Water Boilers 507 115kw  
Location: Building A Rear Service Office

Open  
View forms  
View work orders

You can go straight to the SmartForms by tapping the Actions button on the asset. [See 1.9 on pg 6](#)

## 1.7 The asset details tab opens

Asset - Raypak Atmospheric - Hot Water Boilers 507 115kw

Details Notes Forms

Description: Raypak Atmospheric - Hot Water Boilers 507

Location: Building A

Location At: Rear Service Office

Asset Type: Electric Boiler

Make: Raypak

Model: Atmospheric

Model #: 507 A

Serial Number: 121ahw-115

Service Manual: <http://simonsboiler.com.au/product/raypak-atmos>

ID / Barcode #:

Status: In service (critical)

Condition: Needs repair

Action: Action repairs

Go To + <

The Asset “Details” displays the details of the asset as entered in SmartTrade Office.



The “Service Manual” field allows you enter a web address link to online manuals etc. so the SmartTrade mobile user can access the manuals in the field.

## 1.8 Click on the Forms tab

Asset - Raypak Atmospheric - Hot Water Boilers 507 115kw

Details Notes Forms

Description: Raypak Atmospheric - Hot Water

Location: Building A

Location At: Rear Service Office

Asset Type: Electric Boiler

Make: Raypak

Model: Atmospheric

Model #: 507 A

Serial Number: 121ahw-115

Service Manual: <http://simonsboiler.com.au/product/raypak-atmos>

ID / Barcode #:

Status: In service (critical)

Condition: Needs repair

Action: Action repairs

Go To + <

Tapping on Forms in the top menu bar takes you the SmartForms attached to the asset.

## 1.9 Open the SmartForm

Asset - Raypak Atmospheric - Hot Water Boilers 507 115kw

Details Notes Forms

Job: 5071903-DEMO Total Forms: 2

A6 Boilers

Last completed by:

Last completed date:

Ductless Split Air Conditioning Unit

Last completed by:

Last completed date:

New

New

Go To + <

Tap on the SmartForm you want to open.

# PART 2 — Working with the A6 Boilers Demo SmartForm

## 2.1 Client and Asset details

The screenshot shows the 'A6 Boilers' SmartForm with two tabs: 'Form' and 'Pictures'. The 'Form' tab is active. Under the 'Client Details' section, the 'Client' is 'Demo Test Company' and the 'Site' is '12 Kathleen St, Broadbeach, Gold Coast, Q.L.'. Under the 'Asset Details' section, the 'Asset Type' is 'Electric Boiler', 'Make' is 'Raypak', 'Model' is 'Atmospheric', 'Location' is 'Building A', 'Location At' is 'Rear Service Office', 'Serial No.' is '12/ahw-115', and 'Model No.' is '507'. The 'Last Service' section shows 'Service Type' as 'Month 6' and 'Service Date' as 'Wed, 09 Nov 2016'. A red circle highlights the 'Asset Details' section.

When the SmartForm opens it will be pre-populated with the client and asset details.

## 2.2 Last service details

The screenshot shows the 'A6 Boilers' SmartForm with the 'Form' tab active. The 'Last Service' section shows 'Service Type' as 'Month 6' and 'Service Date' as 'Wed, 09 Nov 2016'. The 'This Service' section shows 'Service Type' as 'Month 9' and 'Service Date' as 'Wed, 02 Nov 2016'. A red circle highlights the 'This Service' section.

The SmartForm will be populated with the last service details and service type and date for this service.

## 2.3 Select the service recurrence

The screenshot shows the 'A6 Boilers' SmartForm with the 'Form' tab active. The 'Last Service' section shows 'Service Type' as 'Month 6' and 'Service Date' as 'Wed, 09 Nov 2016'. The 'This Service' section shows 'Service Type' as 'Month 9' and 'Service Date' as 'Wed, 02 Nov 2016'. The 'This service includes:' section has a list of options: '1 monthly checks', '3 monthly checks', '6 monthly checks', and '12 monthly checks'. The '1 monthly checks' and '3 monthly checks' options are checked, while '6 monthly checks' and '12 monthly checks' are unchecked. A red circle highlights the '1 monthly checks' and '3 monthly checks' options.

The checks required for this service will be checked, you can manually overwrite these settings.

## 2.4 Mandatory workplace safety checks

The field tech must confirm all mandatory workplace safety check s have been completed to be able to open up the rest of the SmartForm.



*The SmartTrade user has a range of options to manage mandatory safety or compliance requirements:*

*At the job level:*

- ◆ *Jobs can have mandatory form(s) attached so the job can't be commenced until the form(s) have been signed off.*
- ◆ *Jobs can have pop-up form(s) attached which the field tech will see when the job is opened, but aren't mandatory.*

*At the asset level:*

- ◆ *SmartForms can have mandatory or non-mandatory check boxes.*

## 2.5 Select the Schedule

Tap on "Select" to select the Schedule you want to work on.



## 2.6 Use the More button

## (A6 Boilers Demo cont.)



### Automatic calculations

Calculations can be incorporated into SmartForms, this demonstration SmartForms doesn't incorporate calculations.

**A6 Boilers**

Form Pictures

1. Attend to any reported problems, check and adjust as necessary. Interval (months): 1  
☐ Passed - no action required ☐ Passed - action required ☐ Failed - W/O created ☐ N/A

2. Check temperatures on floors, in rooms or in any areas requiring special conditions. Interval (months): 1  
☐ Passed - no action required ☐ Passed - action required ☐ Failed - W/O created ☐ N/A

3. Check controls for physical damage. Interval (months): 1  
☐ Passed - no action required ☐ Passed - action required ☐ Failed - W/O created ☐ N/A

4. Check location of thermostats, ensure correct location relative to controlled area. Interval (months): 3  
☐ Passed - no action required ☐ Passed - action required ☐ Failed - W/O created ☐ N/A

GoTo Sign off

Tapping the More button will show more information relating to that check.

On each check there are four selection buttons.

- ⇒ Passed - no action
- ⇒ Passed - action required
- ⇒ Failed - W/O raised
- ⇒ N/A

**A6 Boilers**

Form Pictures

2. Check temperatures on floors, in rooms or in any areas requiring special conditions. Interval (months): 1  
☒ Passed - no action required ☐ Passed - action required ☐ Failed - W/O created ☐ N/A

3. Check controls for physical damage. Interval (months): 3  
☐ Passed - no action required ☐ Passed - action required ☐ Failed - W/O created ☐ N/A

4. Check location of thermostats, ensure correct location relative to controlled area. Interval (months): 3  
☐ Passed - no action required ☐ Passed - action required ☐ Failed - W/O created ☐ N/A

GoTo Sign off

Selecting the “Passed - action required” option allows you to record the fault and the onsite work done to fix the problem.

## 2.8 Passed—action required

**A6 Boilers**

Form Pictures

1. Attend to any reported problems, check and adjust as necessary. Interval (months): 1  
☒ Passed - no action required ☐ Passed - action required ☐ Failed - W/O created ☐ N/A

2. Check temperatures on floors, in rooms or in any areas requiring special conditions. Interval (months): 1  
☒ Passed - no action required ☐ Passed - action required ☐ Failed - W/O created ☐ N/A

3. Check controls for physical damage. Interval (months): 3  
☐ Passed - no action required ☐ Passed - action required ☐ Failed - W/O created ☐ N/A

GoTo Sign off

## 2.9 Failed—W/O created

The screenshot shows the 'A6 Boilers' SmartForm with two tabs: 'Form' and 'Pictures'. The 'Form' tab is active, displaying a checklist of tasks. Step 2, 'Check temperatures on floors, in rooms or in any areas requiring special conditions.', has a 'Failed - W/O created' radio button selected, which is circled in red. A red hand icon points to the 'Add W/O Note' button below the selected option. Other steps include 'Attend to any reported problems, check and adjust as necessary.', 'Check controls for physical damage.', and 'Check location of thermostats, ensure correct location relative to controlled area.' The bottom of the form has a 'Sign off' button and navigation icons.

Selecting the “Failed - W/O created” option allows you to record the fault by clicking on the Add W/O Note button. SmartTrade will create a Work Order in SmartTrade Ultimate when the SmartForm is signed off.

The SmartForm will pre-populate the note with the check number and description. Any notes added here will be transferred to the Work Order in SmartTrade Ultimate. Tapping the “Confirm” button will save the note and return the user to the form.

## 2.10 Adding a work order note

The screenshot shows the 'A6 Boilers' SmartForm with the 'Form' tab active. A dialog box titled 'Add W/O Note' is open, displaying the text '5.2.2 Check temperatures on floors, in rooms or in any areas requiring special conditions. Thermostat on rear wall of the main office needs to be replaced.' The dialog box has a 'Confirm' button in the top right corner. The background form shows step 2 of the checklist.

Add a description of the problem and recommended solution.

## 2.11 Editing work order notes

The screenshot shows the 'A6 Boilers' SmartForm with the 'Form' tab active. The 'Work order notes' panel is open, displaying the text '5.2.2 Check temperatures on floors, in rooms or in any areas requiring special conditions. Thermostat on rear wall of the main office needs to be replaced.' The panel has a 'Clear' button and a 'Sign off' button. The background form shows step 2 of the checklist.

The Work Order notes can be viewed or edited in the Work order notes panel before the SmartForm is signed off.



### Voice recognition dictation

Most modern smart devices allow voice recognition dictation, makes entering notes much easier and even includes spell checking, numerical data can also be entered.

## 2.12 Signing Off the SmartForm

(A6 Boilers Demo cont.)

A6 Boilers

Form Pictures

Select N/A

A6.3 Boilers - Gas Fired

Select N/A

Work order notes

5.2.2 Check temperatures on floors, in rooms or in any areas requiring special conditions. Thermostat on rear wall of the main office needs to be replaced

Technician Name: Kevin Greenfield

Signature

Clear

Service Status: Work Required

GoTo Sign off

The SmartForm is signed off by tapping on the **Sign off** button. After the SmartForm is signed off you cannot make any changes. SmartForms can be edited in the cloud by office staff with permissions to do so.

The appropriate Service Status needs to be selected and the SmartForm signed off before the Work Order is generated.

When you have finished trialling the SmartForm, return to the job list tap on the action button and select "Return job" this will return the job to SmartTrade Office and remove it from your SmartTrade Mobile.

## 2.14 Provide us with Feedback

Charge Up: S001903-DEMO

Job Card Client /Site Job Sheet Notes Job Appointments Signatures Pictures Forms Assets

Job Name: Test - Boiler

Category: Select Category

Status: 2.0 SCHEDULED

Priority: Normal

Opened: Thu, 10 Nov 2016

Due Date: Sat, 12 Nov 2016 16:20

Next Appt: Mon, 12 Dec 2016 09:00

Demo job for the A6 Boiler SmartForm

Please add your feedback here —

Accounting Group: Select Accounting Group

Job List 1: Select Job List 1

Job List 2: Select Job List 2

Estimated hours: 0

GoTo + ! ↶

We would appreciate your comments and feedback. Please add your comments to the job before you return the job to us.

## 2.13 Return the SmartForm

Jobs Active (1 of 1)

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

Client: Demo Test Company

Site: 12 Kathleen St, Broadbeach, Gold Coast, QLD

Contact: Ian Wilson

(09)8526363 (021)7418526

Job Name: Test - Boiler

Job #: S001903-DEMO

Due: Sat, 12 Nov 2016 16:20

Actions

- Open job
- Hide job
- Return job
- Open client
- Reassign job

GoTo + - ! ↶

## PART 3 — Generating the Work Order in the Office

Work orders and assets are SmartTrade Ultimate features. SmartTrade users wishing to use work orders with assets need to have at least one SmartTrade Ultimate office licence in their pool of office licences.

For more information about how SmartForms work with assets please refer to the [Primer for working with SmartForms + Assets](#).

When the work order is generated in SmartTrade Ultimate it is populated with the asset details and the details of the work required from the SmartForm.

The screenshot shows the 'Find Work Orders' window in the SmartTrade Ultimate software. The window is titled 'Find Work Orders' and has a search bar at the top. Below the search bar, there are several tabs: 'Details', 'Approval', 'Current', and 'History'. The 'Details' tab is selected, showing the following information:

- Client & Asset:**
  - Client Name: Demo Test Company
  - Site ID and Address: 12 Kathleen St, Broadbeach, Gold C
  - Location: Building A
  - Location At: Rear Service Office
  - Client Contact: Ian Wilson (Phone: 08 8526363, Mobile: 021 7418526)
  - Site Contact: (Phone: , Mobile: )
  - Asset: Raypak Atmospheric - Hot Water Boilers 507 115kw, Raypak, Atmospheric, 507
- Work Order Description:**
  - Name: 5001861 - 6.1.4 Inspect water treatment units to ensure prop
  - Description: 6.1.4 Inspect water treatment units to ensure proper operation. Water valves are jammed and the water is not being treated, probably will need to replace the valves
- Work Order Details:**
  - Work Order Number: 000185
  - Open: ☒ Open ☐ Closed
  - Opened: Wed, 09 Nov 2016 4:47 p.m.
  - By: Kevin Greenfield
  - Priority: **Urgent** (highlighted in yellow)
  - Work Order Status: **Atten - Work Required** (highlighted in red)
  - Work Order Action: Needs servicing
  - Work Order List 1: Electrical
  - Work Order List 2: Registered Electrician
  - Assigned To: Jack Jones
  - Estimated Cost: \$2500.0000
  - Job Number: 5001095
  - Job Name: work order test
  - Closed: ☐

A yellow callout box on the right side of the window contains the text: 'In the office you can set the priority, assign an employee and generate a job or link the Work Order to an existing job. Also there are two customisable fields.'