SmartTrade

Primer for working with

SmartForms + Assets

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SmartTrade Ultimate

Asset management is a SmartTrade Ultimate feature. SmartTrade users wishing to use assets need to have at least one SmartTrade Ultimate office licence in their pool of office licences.

Importing SmartForms into SmartTrade

To import a new SmartForm into SmartTrade click on the **Administration** tab and go to **Import** in the Forms section. The **Import Form** window will open and from here you can browse for the file SmartTrade has supplied, when you have selected the file click **Import** to import the file. Once you have imported the form you will be able to see it in the list of forms you have installed by clicking on the **Find** icon in the Forms section.
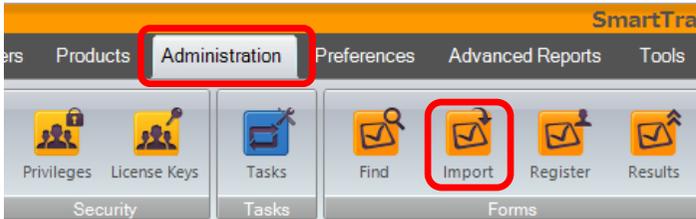
Click **Browse** to find the SmartForm you wish to import.
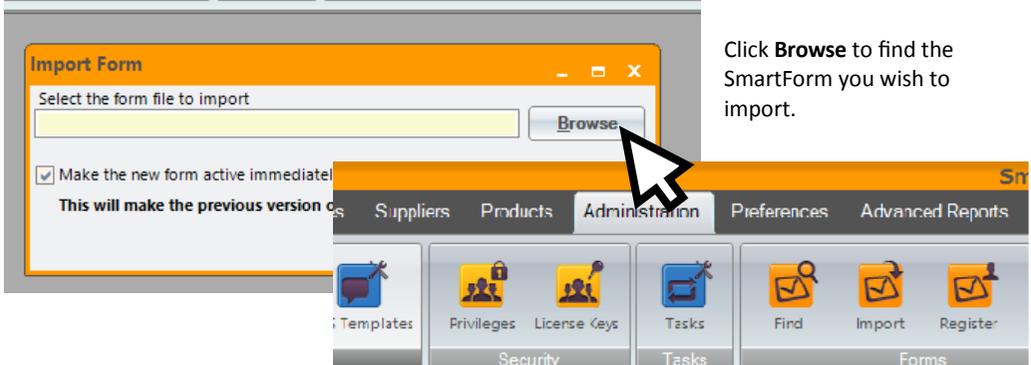
Click **Import** to import the form.
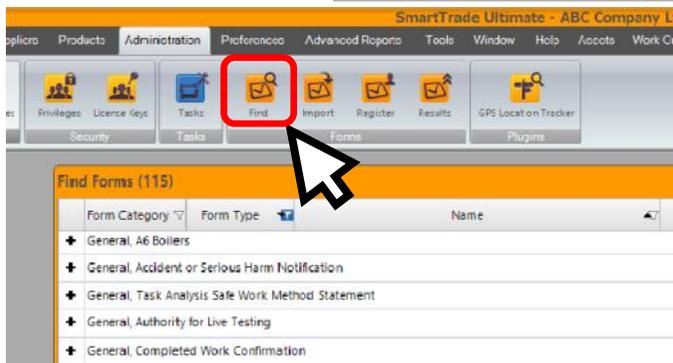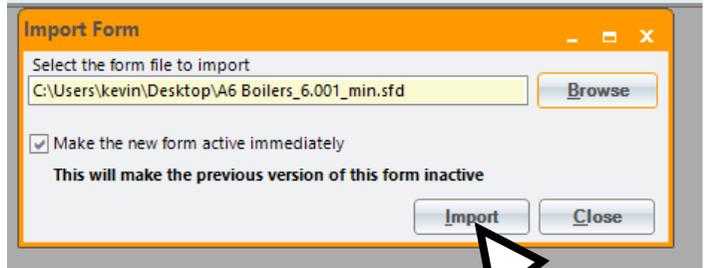
Click on the **Find** icon to view the list of forms installed.

Preference Settings

In **Mobile Preferences** you can set it so that a SmartForm has to be signed off before the job can be returned to the office or give the user a warning that the SmartForm needs to be signed off.
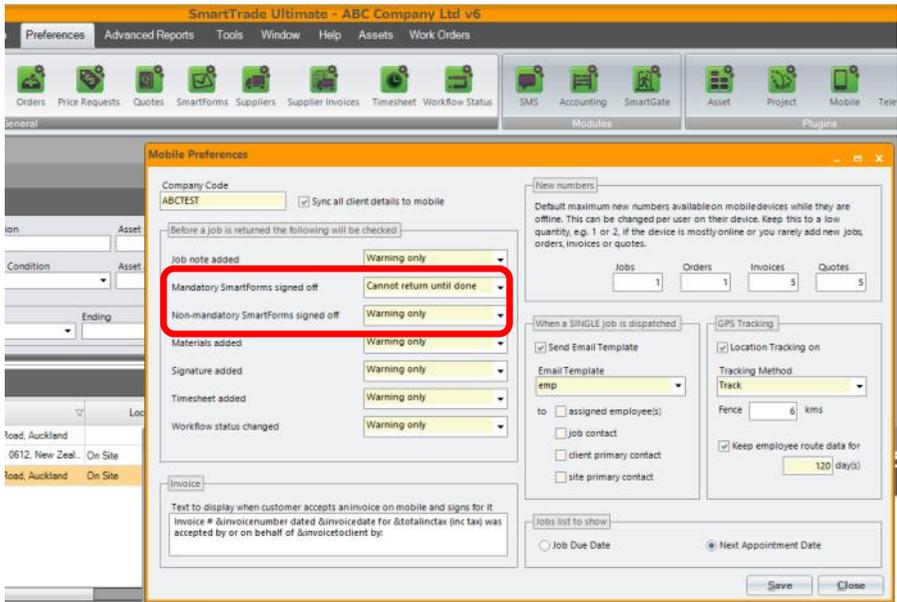
In **SmartForm Preferences** you set up statuses to trigger different actions when the form is signed off.
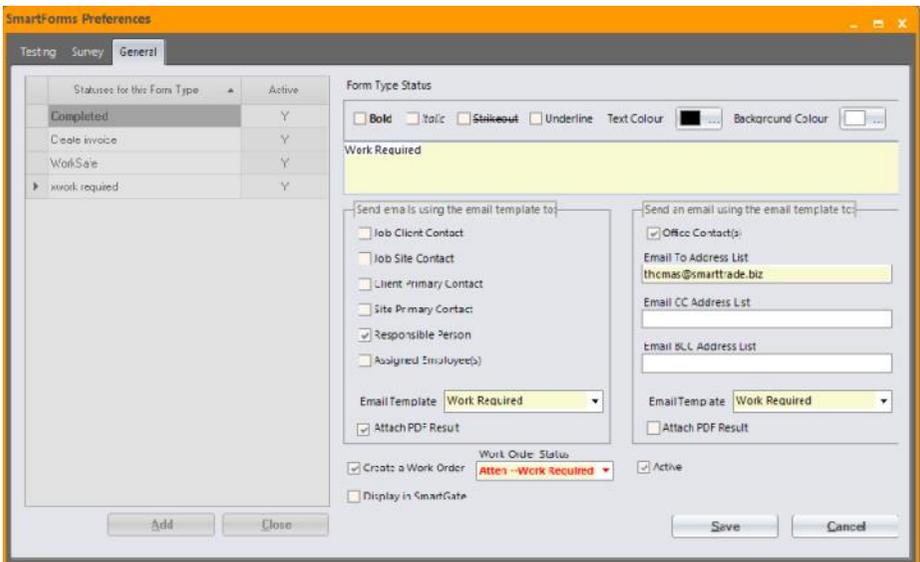
Adding a SmartForm to an Asset
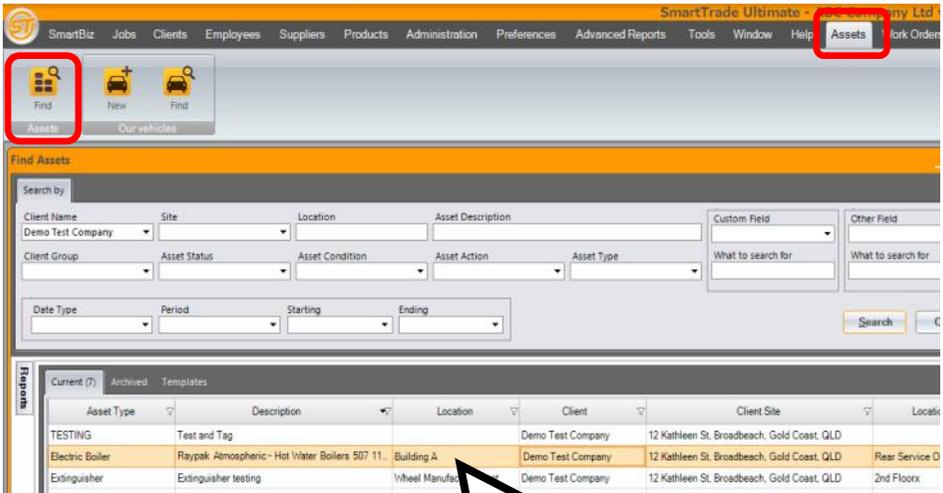
Find and open the asset from the
Find Assets window
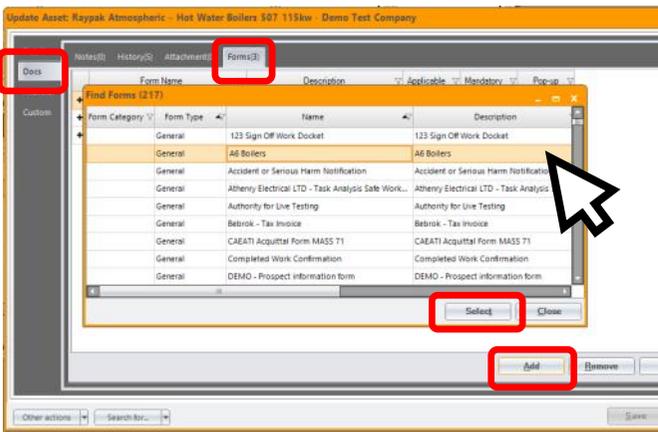
Open the asset, click on
the **Docs** tab, then
Forms.

When the **Find Form**
window opens click
Add and highlight the
form you want to add
and click **Select** to add
the Form.

Once the SmartForm has been
added to the asset you can
double-click on it to open a
dialog box. This will allow you
to set preferences to make the
form mandatory and/or a pop-
up so that the Form opens
when you tap on the asset in
SmartTrade Mobile.
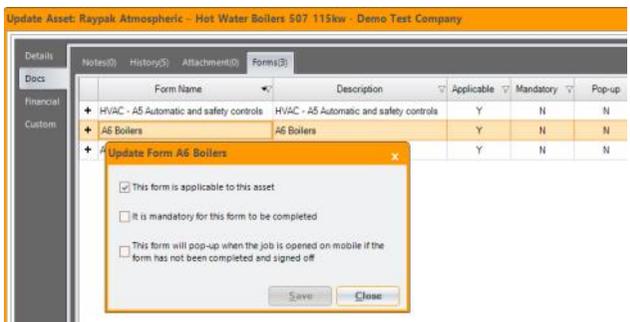
Adding an Asset to a Job

You can either add the asset to an existing job or you can create a job from the asset.
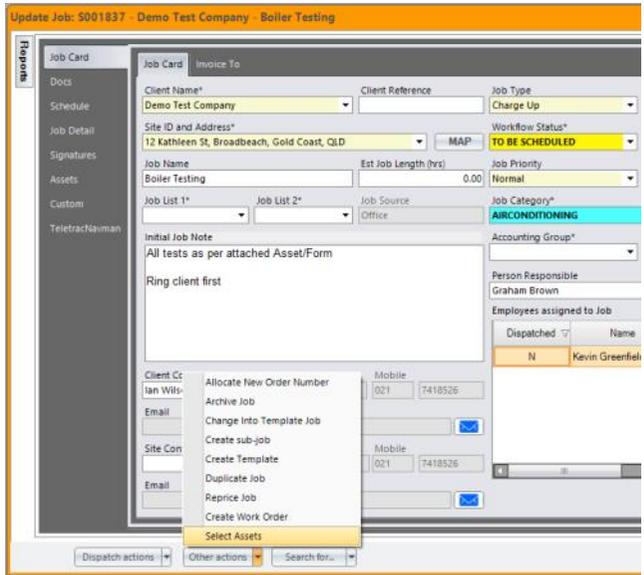
To add an asset to an existing job, from the **Other Actions** menu choose **Select Assets**.

The **Find Asset** window will open and you can select from the assets for that client.

Any forms attached to the asset will come with the asset.
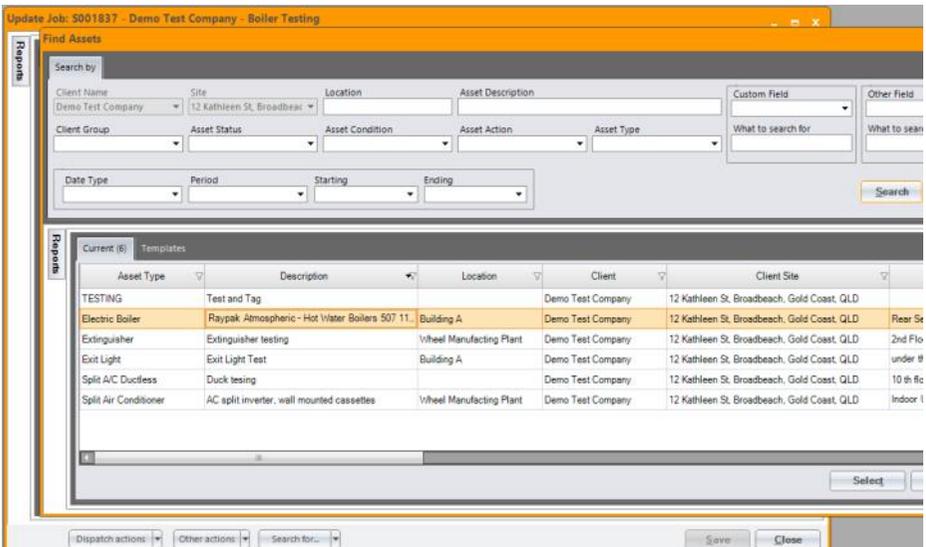
Creating a Job from an Asset

In the asset select **Create Current Job** from the **Other Actions** menu
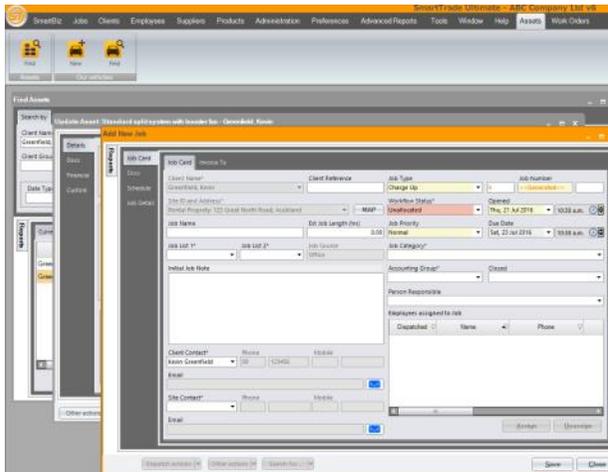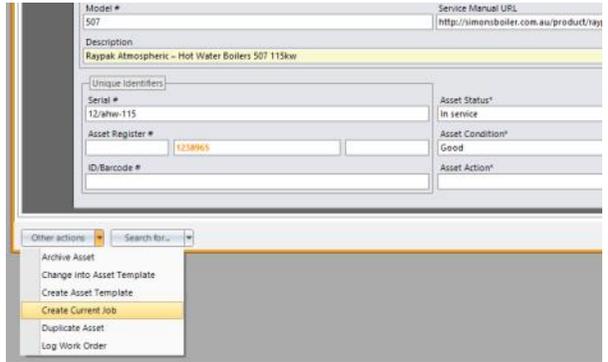
The new job window will open and you can add the job details as normally.

Any forms attached to the asset will still be on the asset.

The job can now be dispatched to the field tech on SmartTrade Mobile.

Any assets and forms on the job or asset will be dispatched.
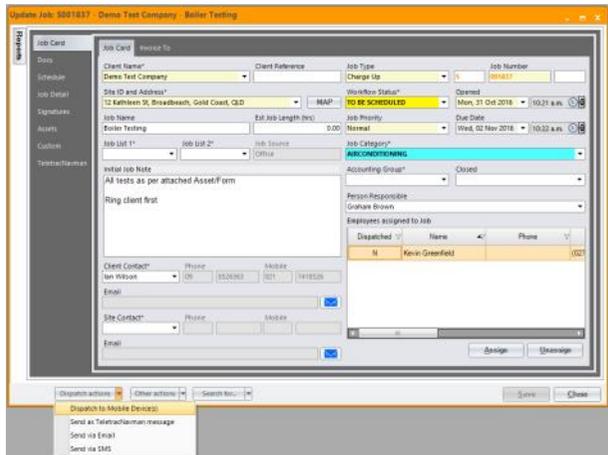
Working with SmartForms in SmartTrade Mobile

Open the Job on SmartTrade Mobile and scroll across to the **Assets** tab, here you will see all the assets attached to that job.

> *The Custom Fields allow extra information to stored on the Asset.*
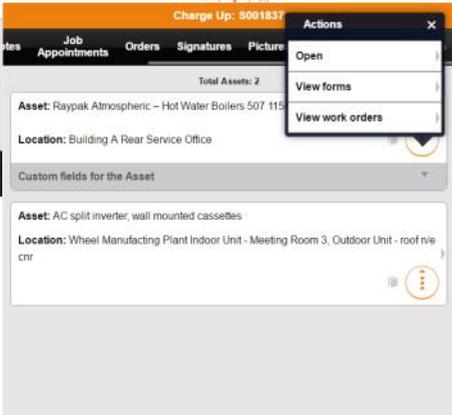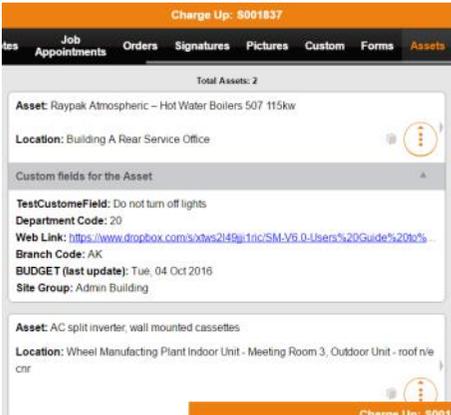
Tap on the **Asset** (i) **Action** button and select **View Forms** to see all the SmartForms attached to that asset.

Tap on the **SmartForm** to open it.

Now you can fill in the SmartForm with your test results

> *The SmartForm status tells you if the form is New, In Progress or Completed.*