

SmartTrade

Primer for working with SmartForms + Assets



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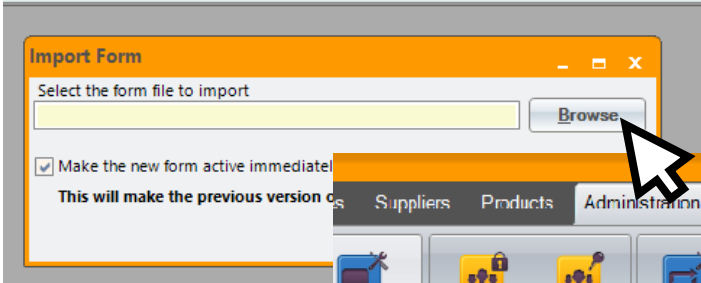
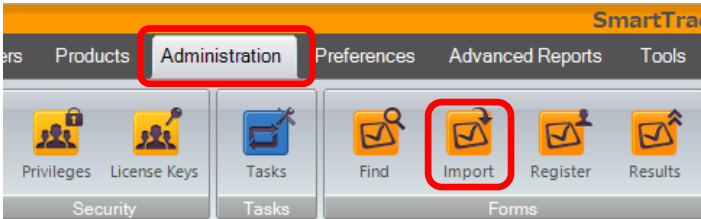
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SmartTrade Ultimate

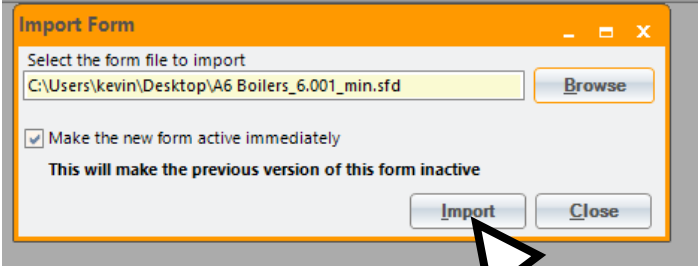
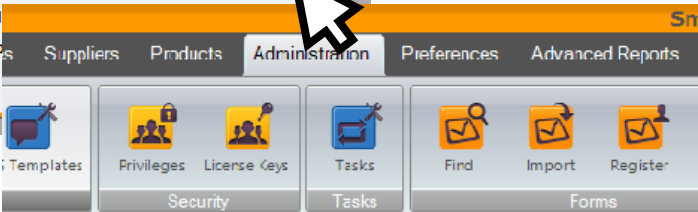
Asset management is a SmartTrade Ultimate feature. SmartTrade users wishing to use assets need to have at least one SmartTrade Ultimate office licence in their pool of office licences.

Importing SmartForms into SmartTrade

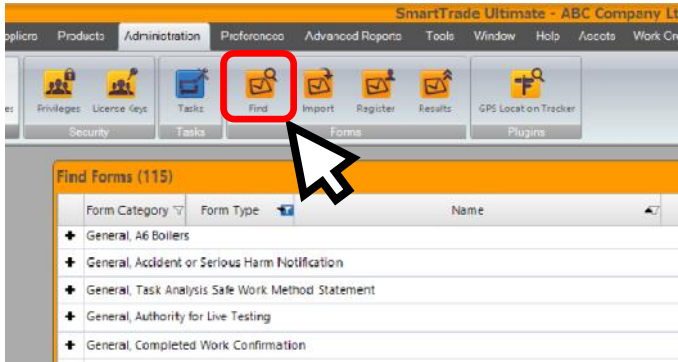
To import a new SmartForm into SmartTrade click on the **Administration** tab and go to **Import** in the Forms section. The **Import Form** window will open and from here you can browse for the file SmartTrade has supplied, when you have selected the file click **Import** to import the file. Once you 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.

SmartTrade Ultimate - ABC Company Ltd v6

Preferences | Advanced Reports | Tools | Window | Help | Assets | Work Orders

Orders | Price Requests | Quotes | SmartForms | Suppliers | Supplier Invoices | Timesheet | Workflow Status | SMS | Accounting | SmartGate | Asset | Project | Mobile | Tele

General

Mobile Preferences

Company Code: ABCTEST ☒ Sync all client details to mobile

Before a job is returned the following will be checked:

- Job note added: Warning only
- Mandatory SmartForms signed off: **Cannot return until done**
- Non-mandatory SmartForms signed off: **Warning only**
- Materials added: Warning only
- Signature added: Warning only
- Timesheet added: Warning only
- Workflow status changed: Warning only

Invoice: Text to display when customer accepts an invoice on mobile and signs for it: Invoice # & Invoice number dated & Invoice date for & Invoice tax (inc tax) was accepted by or on behalf of & Invoice client by:

New numbers: Default maximum new numbers available on mobile devices while they are offline. This can be changed per user on their device. Keep this to a low quantity, e.g. 1 or 2, if the device is mostly online or you rarely add new jobs, orders, invoices or quotes.

Jobs: 1 Orders: 1 Invoices: 3 Quotes: 3

When a SINGLE job is dispatched:

- ☒ Send Email Template
- Email Template: emp
- to: ☐ assigned employee(s) ☐ Job contact ☐ client primary contact ☐ site primary contact

GPS Tracking:

- ☒ Location Tracking on
- Tracking Method: Track
- Fence: 6 kms
- ☒ Keep employee route data for: 120 day(s)

Jobs list to show: ☐ Job Due Date ☒ Next Appointment Date

Save Close

In **SmartForm Preferences** you set up statuses to trigger different actions when the form is signed off.

SmartForms Preferences

Testing | Summary | General

Statuses for this Form Type: Active

Status	Active
Completed	Y
Create invoice	Y
WorkSale	Y
Work required	Y

Form Type Status:

- ☐ Bold ☐ Italic ☐ Strikeout ☐ Underline
- Text Colour: Background Colour:

Work Required:

Send email using the email template to:

- ☐ Job Client Contact
- ☐ Job Site Contact
- ☐ Client Primary Contact
- ☐ Site Primary Contact
- ☒ Responsible Person
- ☐ Assigned Employee(s)

Email Template: Work Required

☒ Attach PDF Result

Work Order Status: ☒ Create a Work Order: Atten -> Work Required ☐ Display in SmartGate

Send an email using the email template to:

- ☒ Office Contact(s)
- Email To Address List: thomas@smarttrade.biz
- Email CC Address List:
- Email BCC Address List:
- Email Template: Work Required
- ☐ Attach PDF Result

Active: ☒

Add Close Save Cancel

Adding a SmartForm to an Asset

SmartTrade Ultimate - Assets

Find Assets

Search by

Client Name: Demo Test Company, Site: , Location: , Asset Description: , Custom Field: , Other Field: , Client Group: , Asset Status: , Asset Condition: , Asset Action: , Asset Type: , What to search for: , What to search for: , Date Type: , Period: , Starting: , Ending: , Search

Asset Type	Description	Location	Client	Client Site	Location
TESTING	Test and Tag		Demo Test Company	12 Kathleen St. Broadbeach, Gold Coast, QLD	
Electric Boiler	Raypak Atmospheric - Hot Water Boilers 507 11	Building A	Demo Test Company	12 Kathleen St. Broadbeach, Gold Coast, QLD	Rear Service O
Extinguisher	Extinguisher testing	Wheel Manufac	Demo Test Company	12 Kathleen St. Broadbeach, Gold Coast, QLD	2nd Floor

Find and open the asset from the **Find Assets** window

Update Asset: Raypak Atmospheric - Hot Water Boilers 507 115kw - Demo Test Company

Docs, Forms(3)

Find Forms (2/3)

Form Category	Form Type	Name	Description	Applicable	Mandatory	Pop-up
General		123 Sign Off Work Docket	123 Sign Off Work Docket			
General	A6 Boilers	A6 Boilers	A6 Boilers			
General		Accident or Serious Harm Notification	Accident or Serious Harm Notification			
General		Attenry Electrical LTD - Task Analysis Safe Work...	Attenry Electrical LTD - Task Analysis			
General		Authority for Live Testing	Authority for Live Testing			
General		Bebrok - Tax Invoice	Bebrok - Tax Invoice			
General		CAEATI Acquittal Form MASS 71	CAEATI Acquittal Form MASS 71			
General		Completed Work Confirmation	Completed Work Confirmation			
General		DEMO - Prospect information form	DEMO - Prospect information form			

Select, Close, Add, Remove

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.

Update Asset: Raypak Atmospheric - Hot Water Boilers 507 115kw - Demo Test Company

Details, Docs, Financial, Custom

Forms(3)

Form Name	Description	Applicable	Mandatory	Pop-up
HVAC - A5 Automatic and safety controls	HVAC - A5 Automatic and safety controls	Y	N	N
A6 Boilers	A6 Boilers	Y	N	N
Update Form A6 Boilers		Y	N	N

Update Form A6 Boilers

☒ This form is applicable to this asset

☐ It is mandatory for this form to be completed

☐ This form will pop-up when the job is opened on mobile if the form has not been completed and signed off

Save, Close

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.

Update Job: S001837 - Demo Test Company - Boiler Testing

Job Card

Job Card

Invoice To

Client Name*

Demo Test Company

Client Reference

Job Type

Charge Up

Site ID and Address*

12 Kathleen St, Broadbeach, Gold Coast, QLD

MAP

Workflow Status*

TO BE SCHEDULED

Job Name

Boiler Testing

Est Job Length (hrs)

0.00

Job Priority

Normal

Job List 1*

Job List 2*

Job Source

Office

Job Category*

AIRCONDITIONING

Initial Job Note

All tests as per attached Asset/Form

Ring client first

Accounting Group*

Person Responsible

Graham Brown

Employees assigned to Job

Dispatched

N

Name

Kevin Greenfield

Client Cc

lan Wills

Allocate New Order Number

Archive Job

Change into Template Job

Create sub-job

Create Template

Duplicate Job

Reprice Job

Create Work Order

Select Assets

Mobile

021 7418526

Mobile

021 7418526

Dispatch actions

Other actions

Search for...

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.

Update Job: S001837 - Demo Test Company - Boiler Testing

Find Assets

Search by

Client Name

Demo Test Company

Site

12 Kathleen St, Broadbeach

Location

Asset Description

Custom Field

Other Field

Client Group

Asset Status

Asset Condition

Asset Action

Asset Type

What to search for

What to search

Date Type

Period

Starting

Ending

Search

Asset Type	Description	Location	Client	Client Site
TESTING	Test and Tag		Demo Test Company	12 Kathleen St, Broadbeach, Gold Coast, QLD
Electric Boiler	Raypak Atmospheric - Hot Water Boilers 507 11	Building A	Demo Test Company	12 Kathleen St, Broadbeach, Gold Coast, QLD
Extinguisher	Extinguisher testing	Wheel Manufacturing Plant	Demo Test Company	12 Kathleen St, Broadbeach, Gold Coast, QLD
Exit Light	Exit Light Test	Building A	Demo Test Company	12 Kathleen St, Broadbeach, Gold Coast, QLD
Split A/C Ductless	Duct testing		Demo Test Company	12 Kathleen St, Broadbeach, Gold Coast, QLD
Split Air Conditioner	AC split inverter, wall mounted cassettes	Wheel Manufacturing Plant	Demo Test Company	12 Kathleen St, Broadbeach, Gold Coast, QLD

Dispatch actions

Other actions

Search for...

Select

Save

Close

Creating a Job from an Asset

In the asset select **Create Current Job** from the **Other Actions** menu

This screenshot shows the 'Other Actions' menu for a specific asset. The menu options are: Archive Asset, Change into Asset Template, Create Asset Template, **Create Current Job** (highlighted), Duplicate Asset, and Log Work Order. The asset details visible in the background include Model # 507, Service Manual URL, Description Raypak Atmospheric - Hot Water Boilers 507 115kw, and Unique Identifiers (Serial # 12/ahw-115, Asset Register # 1218965, ID/Barcode #).

This screenshot shows the 'Create New Job' window. It contains various fields for job creation, including Client Name, Job Type, Job Number, Job Name, Job Length, Job Priority, Due Date, Job Category, Accounting Group, and Person Responsible. There are also sections for Client and Site contact information.

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.

This screenshot shows the 'Update Job' window for a job titled 'Dennis Test Company - Boiler Testing'. The job details are filled out, including Client Name, Job Type, Job Number, Job Name, Job Length, Job Priority, Due Date, Job Category (highlighted in blue), Accounting Group, and Person Responsible. At the bottom, there is a 'Dispatch to Mobile Device' button, which has a dropdown menu with options: 'Send as Teletaskman message', 'Send via Email', and 'Send via SMS'.

Working with SmartForms in SmartTrade Mobile

Charge Up: 5001837

Assets Job Appointments Orders Signatures Pictures Custom Forms **Assets**

Total Assets: 2

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

Custom fields for the Asset

TestCustomField: Do not turn off lights
Department Code: 20
Web Link: <https://www.dropbox.com/s/xtws2l49j1nc/SM-V6.0/Users%20Guide%20v6%20.pdf>
Branch Code: AK
BUDGET (last update): Tue, 04 Oct 2016
Site Group: Admin Building

Asset: AC split inverter, wall mounted cassettes
Location: Wheel Manufacturing Plant Indoor Unit - Meeting Room 3, Outdoor Unit - roof n/e cnr

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.

Charge Up: 5001837

Assets Job Appointments Orders Signatures Pictures **Actions**

Open
View forms
View work orders

Total Assets: 2

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

Custom fields for the Asset

Asset: AC split inverter, wall mounted cassettes
Location: Wheel Manufacturing Plant Indoor Unit - Meeting Room 3, Outdoor Unit - roof n/e cnr

Tap on the **Asset** **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

Asset - Raypak Atmospheric – Hot Water Boilers 507 115kw

Details Notes **Forms**

Job: 5001837 Total Forms:2

A6 Boilers New
Last completed by:
Last completed date:

HVAC - A5 Automatic and safety controls In Progress
Last completed by:
Last completed date:

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

A6 Boilers Ver:9.1

Client Details

Client: Demo Test Company
Site: 12 Kathleen St, Broadbeach, Gold Coast, Q

Asset Details

Asset Type: Electric Boiler
Make: Raypak
Model: Atmospheric
Location: Building A
Location At: Rear Service Office
Serial No: 12ahw-115