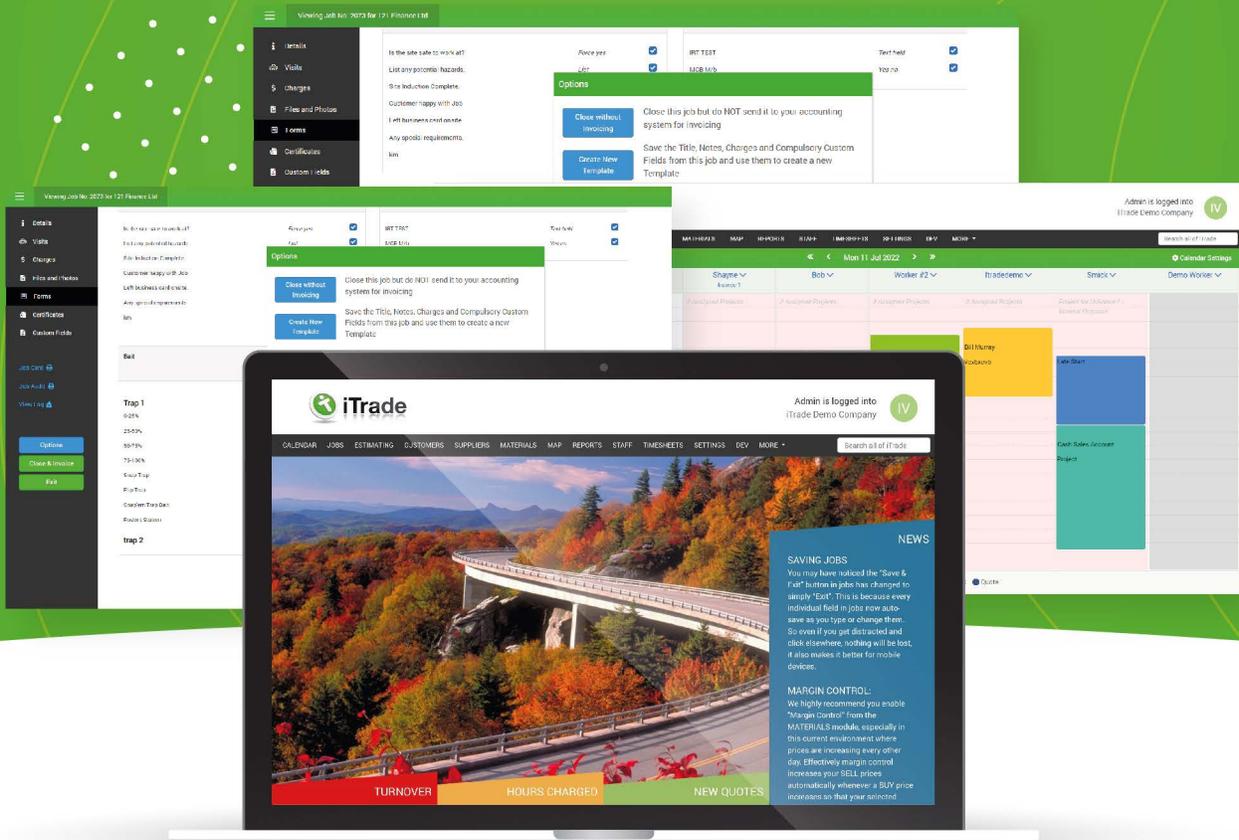


iTrade

Software for the Trades



USER GUIDE



iTrade

Software for the Trades

CALENDAR JOBS ESTIMATING CUSTOMERS SUPPLIERS MATERIALS MAP REPORTS STAFF TIMESHEETS SETTINGS DEV MORE

Project #102

Details

Project Site: [Input] Project # 102

Customer Name: [Input]

Order No: [Input]

Site: [Input]

1020 Phoenix Washington District and United States

CALENDAR JOBS ESTIMATING CUSTOMERS SUPPLIERS MATERIALS MAP REPORTS STAFF TIMESHEETS SETTINGS DEV MORE

Viewing Job No: 2013 For 121 Finance Ltd

Admin is logged into iTrade Demo Company

NEWS

SAVING JOBS

You may have noticed the "Save & Exit" button in jobs has changed to simply "Exit". This is because every

Options

Close this job but do NOT send it to your accounting system for invoicing

Close without invoicing

Close this job but do NOT send it to your accounting system for invoicing

is job automatically repeat at any time

ptions, visits, attachments, certificates, in this job and merge them into another customer. You can also merge multiple in a Customers account.

to be for the customer with the same site, or not visits

stores the job and removes it from all however the job will still be listed in the end at the customer's "History" tab.

Unscheduled Jobs

Unscheduled jobs scheduled for today	Change	Worker #2	Headshots
7am	Change Project	Change Project	Change Project
8am	Card Sales Account	Card Sales Account	Card Sales Account
9am	Card Sales Account	Card Sales Account	Card Sales Account
10am	Card Sales Account	Card Sales Account	Card Sales Account
11am	Card Sales Account	Card Sales Account	Card Sales Account
12pm	Card Sales Account	Card Sales Account	Card Sales Account
1pm	Card Sales Account	Card Sales Account	Card Sales Account
2pm	Card Sales Account	Card Sales Account	Card Sales Account
3pm	Card Sales Account	Card Sales Account	Card Sales Account
4pm	Card Sales Account	Card Sales Account	Card Sales Account

Jobs

Submitted

Sun 3 Apr 2022

Mon 4 Apr 2022

Pro 1926 Site

Duration: 1.00

Pro 1640 Asst

Duration: 2.00

Pro 1640 Asst

Duration: 1.50

Pro 1804 Site

Duration: 1.00

5 May 2022

Annual Leave

Duration: 3.00

Annual Leave

Duration: 1.00

Total for Mon 4 Apr 2022

Normal: 3.50

Annual Leave: 1.00



Company Name

User name

password

Login

Don't have an account? [Start Trial](#)



Company

Username

Password

Login

Table of Content

Login:	6
To server (browser):	6
To the app (IOS or Android):	6
Dashboard	7
Calendar	8
Layouts	8
Tips:	8
Calendar settings	9
Tips:	10
Tasks	11
Tips	11
Jobs and Projects	12
The difference:	12
Jobs:	12
Projects:	12
New Job or project:	13
Tips:	14
Inside a Job	14
Inside a Recurring Job	17
Recurrence:	18
Tips:	18
Inside a project	19
Inside a template	23
Jobs module lists:	24
Status:	24
Current:	25
Tips:	25
Completed:	26
Recurring:	26
Tips:	26
Closed:	27
Templates:	27
Job Forms:	27
Options:	28
Tip:	29

Estimating	30
New Quote	30
Tips:	33
Current	33
Tips:	33
Archived	34
Templates	34
Schedules	34
Options	34
Customers	35
Current	35
Archived	35
Custom Fields	35
Tips:	36
Reminders	36
Tips:	37
Options	38
Invoices	38
Inside a customer's account	38
Sites	39
Active	39
Notes	39
Files	40
History	40
Custom Fields	40
Certificates	40
Login	40
Invoices	40
Suppliers	41
Add a supplier	41
Current	41
Archived	41
Inbox	42
Tips:	43
Purchase orders	43
Invoices	43
Tips:	43
Options	44
Materials	45
Materials	45
Time	46
Kitsets	46
Import	47
Database	47

Note:	47
Margin Control	48
Tips:	48
Options	48
Tips:	48
Maps	49
Reports	50
Customers	50
Van stock usage	50
Tips:	50
Job Audits	50
Analysis	50
Manual Reminders	51
Sent Emails	51
Custom	51
Staff	52
Current	52
Archived	53
Custom Fields	53
Timesheets	54
Timesheet	54
Options	55
Settings	56
Settings	56
Company	56
Upload logo	56
Tax	56
Location	56
Accounting System	57
Note:	57
Export Data	57
More	58
Messages	58
Help	58
Certificates	58
Logout	58

Login

A screenshot of a web login form. It has three input fields labeled "Company", "Username", and "Password". Below the fields is a green "Login" button.

To server (browser):

For any login to the server we use the link <https://login.itrade.net/login.php> This will take you directly to the login page

To login ensure you have received

Company:

Username:

Password:

(Please note only passwords are case sensitive)

Staff must be enabled as administrator to login to the server end (more information on this is in the Staff Current section).

If you are having trouble or have forgotten your password please email. support@itrade.net

Please include your company and username in your email.

A screenshot of the iTrade Pro app login screen. It features the iTrade logo at the top, followed by three input fields labeled "Company Name", "User name", and "password". Below the fields is a green "Login" button. At the bottom, there is a link: "Don't have an account? Start Trial".

To the app (IOS or Android):

For any login to the app you must have the iTrade Pro app downloaded from the app store or play store.

To login ensure you have

Company:

Username:

Password:

(Please note only passwords are case sensitive)

Staff must be enabled as field workers to login to the app (more information on this in the Staff, current section).

If you are having trouble or have forgotten your password please email. support@itrade.net

Please include your company and username in your email.

Dashboard

The dashboard can be found by clicking on the “iTrade” logo in the top left corner, once logged in.

This dashboard will show turnover information, hours charged per worker and quote information. To view more information click on the tab to open.

iTrade

Admin is logged into iTrade Demo Company **IV**

CALENDAR JOBS ESTIMATING CUSTOMERS SUPPLIERS MATERIALS MAP REPORTS STAFF TIMESHEETS SETTINGS DEV MORE ▾ Search all of iTrade

NEWS

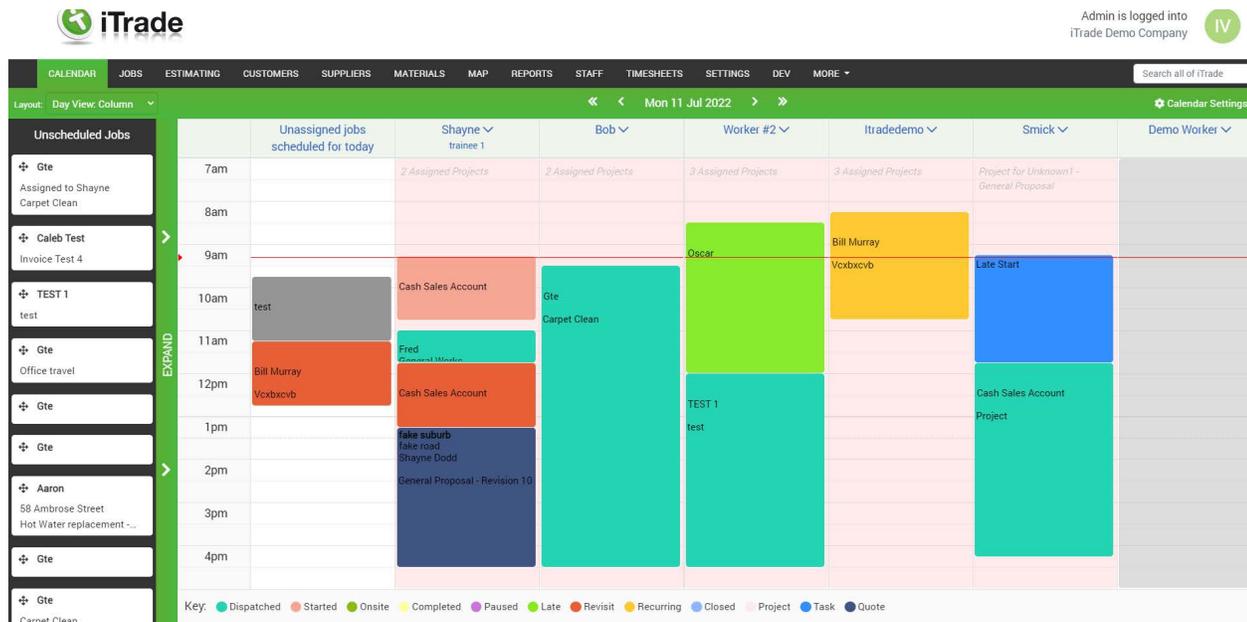
SAVING JOBS
You may have noticed the "Save & Exit" button in jobs has changed to simply "Exit". This is because every individual field in jobs now auto-save as you type or change them. So even if you get distracted and click elsewhere, nothing will be lost, it also makes it better for mobile devices.

MARGIN CONTROL:
We highly recommend you enable "Margin Control" from the MATERIALS module, especially in this current environment where prices are increasing every other day. Effectively margin control increases your SELL prices automatically whenever a BUY price increases so that your selected margin is maintained and you don't

TURNOVER **HOURS CHARGED** **NEW QUOTES**
Week Month Week Month Week Month

Calendar:

The calendar displays all your dispatched jobs, assigned or dispatched projects and tasks.



Layouts

You can choose 6 different layouts:

1. Day view: Row, this will display jobs/projects or tasks in a horizontal format for a single day.
2. Day view: Column, this will display jobs/projects or tasks in a vertical format for a single day.
3. Week view: Row, this will display jobs/projects or tasks in a horizontal format for a week.
4. Week view: Column, this will display jobs/projects or tasks in a vertical format for a week.
5. Week view: Custom, this will display jobs/projects or tasks in a vertical format for a week.
6. Month: This will display jobs for all days of the chosen month with workers and jobs listed in each day.

Tips

Left side menu can be hidden by clicking “Expand” or “Close”. This menu can be expanded twice to show “Unscheduled jobs” (First column) and “Tasks” (Second Column).

You can drag and drop jobs around to reschedule them. The unassigned column can be used as a ‘holding pen’ while shuffling jobs around.

Assigned project will display in light pink. This will not block you from booking jobs for that day. You can click on the calendar in an empty space to add a job, task or view any assigned projects.

Calendar settings

iTrade Admin is logged into iTrade Demo Company IV

CALENDAR JOBS ESTIMATING CUSTOMERS SUPPLIERS MATERIALS MAP REPORTS STAFF TIMESHEETS SETTINGS DEV MORE

Search all of iTrade

Global Calendar Settings

Calendar Type [?](#) Live Static

Working hours Start: 7:00am Finish: 5:00pm

Auto expand working hours on the calendar to show jobs outside of these hours

User Based Calendar Settings (settings for Admin)

These settings are saved per user, meaning that different users can have different settings.

Google Calendar [?](#) You cannot link your google calendar when signed in as Admin

Show week as: Next 7 days

Clicking on job: Shows Preview

Hovering over a job: Does Nothing

Clicking on a day in Month View: Opens clicked day in day view: column

Max Event Stack [?](#): 3

Save

In the calendar tab on the top right of the screen you will see “Calendar settings” which allows you to customize your view.

Working hours: We will only display the calendar to the set hours, unless a booking gets booked outside of these hours. If a booking is booked outside your working hour we will automatically expand the calendar to show the visit.

Show week as: You can set this to how you would like the week view to display.

Clicking on a job: This is what will happen when you click on a job in the calendar view, Either “Show preview” or “Does nothing” or “Open job”.

Hovering over a job: If you hold your mouse cursor over a job choose whether you would like it to “Show Preview” or it “Does nothing”

Clicking on a day in month view: Choose whether it “Opens clicked day in day view column” or “Opens clicked day in day view: row” or “Does nothing”

Max event stacks

Show/Hide & reorder field workers on the calendar: You can choose to hide a worker from the calendar if you are not making a booking for this worker, you can also reorder the staff how you would like them to appear in the calendar.

Bold field: Choose a field that will appear bold on the calendar for any visit booked.

1 line Jobs: This is what will be displayed in the job if the visit only allows 1 line to be displayed. (If the duration is very short)

2 line Jobs: This is what will be displayed in the job if the visit only allows 2 lines to be displayed.

3 line Jobs: This is what will be displayed in the job if the visit only allows 3 lines to be displayed.

4 line Jobs: This is what will be displayed in the job if the visit only allows 4 lines to be displayed.

5 line Jobs: This is what will be displayed in the job if the visit only allows 5 lines to be displayed.

Tips

Each booking takes up a block of space on the calendar according to its duration. The shortest duration is 15 minutes. The longer the duration the more information can be displayed. For larger businesses each dispatcher can select their “Crew” of workers that they manage so their calendar is not cluttered

Tasks

Tasks are a quick way to add meetings, etc on the calendar. Tasks make workers “busy” and notes can be added to these tasks on the App by field workers or admin staff on the server. Recent tasks can be seen in the left hand menu to view all tasks, scroll to the bottom of this list and click all tasks. Give all tasks a title to easily find in the future.

Tasks consist of:

Task title:

These will also be displayed on the app

Notes:

These will also be displayed on the app and allow additional notes to be added. When a note is added from the app, the worker’s name will be recorded.

Contact:

These will also be displayed on the app.

Task Date:

Tasks can only contain one date and time but can be assigned to any number of workers.

Files and photos:

These will also be displayed on the app and allow additional photos and files to be added

Tips

Tasks are normally only used to fill a space and have a reminder note.
To add annual leave or public holiday please see “Staff”

Jobs and Projects:

The difference:

Jobs:

Generally used for work that will take less than a week and less than a handful of separate visits to complete. For simplicity a job more or less becomes an invoice at the end of the job, so one job equals one invoice.

Projects:

Generally used for work that will cross calendar months and require progress payments, signed variations, show profit & loss and include comprehensive reporting. Best for installation and construction or companies that want to give more flexibility to their field workers as it allows them to work on their projects as and when they require provided they are assigned to them.

Table	Jobs	Projects:
Visits	One visit is required for each visit to site for each worker. Visits must be completed before leaving site.	Projects can optionally have specific visits added for individual workers OR be “assigned” to workers which means they will always have the project on their App and can start it any time they require.
Profit and Loss	Each job will show a margin for all materials and time added to the charges section, and a total at the bottom.	Each project will show a margin for all materials and time added to each schedule, and will also display actuals vs estimated quantities. All schedules will show remaining time. Profit and loss calculator at bottom of project to show profit on time or materials.
Time and Materials	Time and materials will display together in the charges section.	Time and materials can be displayed together or separated .
Invoicing	One job = One Invoice.	You can push as many invoices into your accounting system as required from within a project. An ‘Invoiced to-date’ record is kept in the project. You can send individual invoices per schedule as actuals or estimated. You can also choose to send it as 1 total price or bill line items.
Auto Recurring	Jobs can be set to automatically recur at any interval and on specific days of the week, month or year. They can have notes, charges and attachments added and be assigned to specific workers or left unassigned.	Projects can not Auto-Recur
Schedules	Jobs can’t have schedules	Projects can have unlimited individually priced schedules allowing you to break-down large projects into smaller parts.

New Job or project:

When adding a new job or project and the customer has active jobs/projects, we will ask if the job/project you are creating is already in the system (this stops double ups) and what site the job/project is for

Job #	Loaded	Booked	Name	Job Address	Job Title	Worker	Status	Visit Type
R-2035	07 Jun 2022	07 Aug 2022	Bill Murray		Waiting for part 17/02	itradedemo	Dispatched	
R-2025	26 May 2022	27 Jul 2022	Bill Murray		Vcxbxcvb	itradedemo	Dispatched	Charge Up
J-2073	04 Jul 2022	26 Jul 2022	121 Finance Ltd	3B Albany Highway, Albany, Auckland		Smick	Dispatched	
J-2072	04 Jul 2022	26 Jul 2022	121 Finance Ltd	3B Albany Highway, Albany, Auckland		Smick	Dispatched	
R-2024	26 May 2022	25 Jul 2022	Bill Murray		Vcxbxcvb	itradedemo	Dispatched	Charge Up
R-2075	09 Jul 2022	15 Jul 2022	TEST 1		test		Dispatched	Charge Up
R-2074	08 Jul 2022	14 Jul 2022	Bill Murray	10 Rowan St, Wangaratta, Victoria		itradedemo	Dispatched	
J-2052	16 Jun 2022	11 Jul 2022	Cash Sales Account 1234			Shayne	Started	
J-2067	29 Jun 2022	11 Jul 2022	test				Unassigned	
J-2057	17 Jun 2022	17 Jul 2022	Oscar			Worker #2	Dispatched	
J-2064	27 Jun 2022	11 Jul 2022	Gte		Carpet Clean	Bob	Dispatched	
R-2071	04 Jul 2022	11 Jul 2022	Bill Murray		Vcxbxcvb		Revisit	

Adding a new job can be done in a multitude of ways;

- Calendar view, Click the calendar in the date and time you would like to make the booking. Choose “Job”, “select a customer”. When this is done we will automatically add the worker, date, time and duration into the visit section based on where on the calendar you clicked.
- From the “Jobs” module, select “New job”
- From the “Customers” module “the customer” you would like to create the job for. Then “New Job”
- From any quote/ estimate that has only 1 schedule. Quotes with multiple schedules can have projects created from them but not jobs

Adding a new project can be done in a multitude of ways

- From the “Jobs” module, select “New project”
- From the “Customers” module “the customer” you would like to create the job for. Then “New Project”
- From any quote/estimate.

Tips

Projects can also be assigned, this will make them display in pink in the calendar and they will not have a time and date, meaning they won't make a worker busy. Assigned projects will display on the app ready to start at any time. A worker can complete or revisit an assigned project and it will automatically repopulate on their app ready to start their next visit.

Any job or project information that is edited, will not affect the customer account, should you remove a contact or edit contact information. This will not affect the customer's main account or any other jobs/project already created.

Inside a Job

The screenshot shows the 'Viewing Job No: 2073 for 121 Finance Ltd' interface. The sidebar on the left contains navigation options: Details, Visits, Charges, Files and Photos, Forms, Certificates, and Custom Fields. The main content area displays job details, including a list of potential hazards, site induction completion status, and customer happiness. A 'Bait' section shows a progress bar for 'Trap 1' and 'trap 2'. An 'Options' dialog box is open, listing actions such as 'Close without Invoicing', 'Create New Template', 'Make Recurring', 'Merge', 'Duplicate', and 'Archive', each with a brief description of its function.

Job Title: This field is used to show a brief note on the calendar screen and as the job title on your workers app. It is also shown on the “Jobs” module main list screen which makes it handy for notes such as; “Part ordered from XYZ supplier, due in on ABC date” or “Left message xx/xx/xx” or “You MUST be there before 11:30”. Job Title is NOT displayed on invoices.

Customer name: This is the customer the job is booked for, it can be changed once a job is started, if you have inadvertently selected the wrong customer.

Order No: We will automatically add the quote number in here if you have created this job from a quote. Alternatively you can add your order number here. We will also use the address as the order number.

Job address: This address can be changed to any site listed under that customer or you can add a new site. The main site is the customer’s physical address.

Tip: The Building/Unit/Apt field is optional, this is used for business names and unit numbers not listed in the google address finder.

Contacts: You can choose when adding contacts to a customer if you would like to include them in all jobs/projects, if selected they will automatically be added to every job. You can add up to 6 contacts per job/project. Any contacts added on a job/project will only appear on that job/project. If you would like a contact on all future jobs/projects make sure you add them in the customer’s account. All contacts added in jobs will appear on the iTrade Pro app.

Job notes: This is where you enter all your notes that you would like the field worker to view. Anything in this box is visible on the app. You can change whether the field worker notes are included in the job notes section. Click the “Change” button to view options. Jobs notes will be included in the invoicing page, however can be edited before the invoice is sent.

Visit Data: This is where all your field workers data will be stored, this information is uneditable and will give GPS data, travel time, onsite time, paused time, total time, worker name and notes.

Visits: This is where you book a visit for a field worker to attend. When you add a worker with a time and date this will make the worker “busy” on the calendar, this avoids double booking. Default duration and visit types are set in the “jobs”, “option” section. Copy will copy all information except for the worker. Status will display the status of that visit. “Email” will email a booking confirmation for that visit to any contacts added to the job, you can also add additional emails. “SMS” will send a text message confirmation for that visit to any contacts added to the job, you can also add additional numbers. If the customer replies to the SMS we will add this to the job note section and display a pop up when the reply is received. Additional charges apply for text messages. The primary visit is indicated by a small green dot next to the visit number and will be the one to display its status in the current/completed list.

Charges: This is where you add any charges you would like to appear on the invoice. Charges can also be added via the mobile app. “Set margins” will allow you to push a margin to all items on the job with a single click. Time items added on the app will also populate the workers timesheet (this is subject to settings in the app)

Files and photos: Is where you would upload any files or photos to the job. You can also drag and drop files in this box. Any photos or files added via the app will also appear in the section. All files and photos will appear on the app and on the server.

Forms: Each of your job forms can be turned on or off for jobs, they can also be made compulsory meaning field workers will be forced to complete the form. New forms can be created at “Jobs” then “Job Forms”

.....

Certificates: iTrade does not guarantee the validity of certificates as many states do not accept 'self created' compliance certification. It is up to each user to ensure acceptance by their local authorities. Currently iTrade offers certification for the UK, Queensland and New Zealand. If you would like an additional certificate created for your business please email us support@itrade.net charges apply. Certificates are created as PDF documents which can be printed. Certificates are accessible at any time from the customer's account, Job or project, or in the field on the App. Certificates are stored in the cloud in the Northern and Southern hemisphere and also backed up daily to a 3rd party server. iTrade saves your certificates for a minimum of 7 years.

Custom Fields: Can be made from "Customers" then "Custom Fields" section. Custom fields can be made to show in the app or made compulsory. This is where you record information such as install date, model number, serial number etc.

Job card: This will create a PDF copy of the job to include, Details section, Job Title, Visits, Job notes, Attached images and Job history. What displays on your job cards is editable at "Jobs" then "Options"

Job Audit: Will create a PDF copy of the job to include all information from the job including charges and GPS audits. Audits include all data and are not editable.

View Log: This will give a log of all events in the job.

Options:

The screenshot shows a mobile application interface for job management. At the top is a green header with the word "Options". Below it is a list of actions, each with a blue button and a text description:

- Close without Invoicing:** Close this job but do NOT send it to your accounting system for invoicing
- Create New Template:** Save the Title, Notes, Charges and Compulsory Custom Fields from this job and use them to create a new Template
- Make Recurring:** You can make this job automatically repeat at any selectable time frame
- Merge:** Take all the job notes, visits, attachments, certificates, and charges from this Job and merge them into another Job for the same customer. You can also merge multiple Jobs at once from a Customers account.
- Duplicate:** Creates a new job for the customer with the same site, title and notes but not visits.
- Archive:** Archiving a job closes the job and removes it from all calendar views however the job will still be listed in the "Closed" jobs list and at the customer's "History" tab.

A grey "Cancel" button is positioned at the bottom right of the options list.

Close without invoicing: This will close this job but will NOT send it to your accounting system or create an invoice.

Create new template: Will use Title, Notes, Charges and Compulsory Custom Fields from this job and use them to create a new Template.

Make recurring: You can make this job automatically repeat at any selectable time frame.

Merge: Take all the job notes, visits, attachments, certificates, and charges from this Job and merge them into another Job for the same customer. You can also merge multiple Jobs at once from a Customer's account.

Duplicate: Creates a new job for the customer with the same site, title and notes but not visits.

Close and invoice: This is used when a job is complete and you would like to prepare an invoice. You can select invoice dates, due dates, invoice type (this is for Xero link if you would like to send a draft or an approved), invoice email (we will use the email from the customer account), Invoice reference, invoice notes (these will be any notes that were in the notes section of the job, any notes edited here will not affect the job notes). You can combine time items, this will then display only “Time” and a total, combine materials, this will display only “Materials” and a total, combine time and materials displaying only “Time and Materials” and a total or As per Quote, This allows you to add one price and a description, used for quoted work. You can then “create invoice and close job” which then creates the invoice.

Save & Exit, this will save the changes and return you back to the previous screen.

Inside a Recurring Job

The screenshot shows the iTrade software interface. At the top, there is a navigation menu with options: CALENDAR, JOBS, ESTIMATING, CUSTOMERS, SUPPLIERS, MATERIALS, MAP, REPORTS, STAFF, TIMESHEETS, SETTINGS, DEV, and MORE. A search bar is located on the right side of the menu. Below the menu, there is a sub-menu with options: Current, Completed, Recurring, Closed, Templates, Job Forms, and Options. A button labeled "New Recurring Job" is visible on the left. A search bar labeled "Search Recurring" is on the right. The main content area displays a table of recurring jobs with the following data:

Rec #	Title	Name	Job Address	Worker	Frequency	Next Due	Auto Schedule
R-2	Repeat service	Bill Murray	1600 Pennsylvania Avenue Northwest, Washington, District of Columbia	itradedemo	Every week on Monday, Wednesday	Wed 13 Jul 2022 @ 08:15	NO
R-3		Bill Murray	Buckingham Palace, London, England	itradedemo	Every week on Thursday	Thu 14 Jul 2022 @ 06:00	YES
R-5	Do reminders	Shayne SDA	Al Haram, The Great Pyramid of Giza, Giza Governorate		every week on Monday	Mon 18 Jul 2022 @ 08:00	YES
R-6	Lawn mowing	Shayne SDA	..	Shayne	every 6 months on the 1st Monday until December 31, 2021		YES
R-8	Vcxbxcvb	Bill Murray	..	itradedemo		Sun 17 Jul 2022 @ 13:00	NO

At the bottom of the table, there is a pagination control showing "1" and "Items count: 5".

Job title: same as job page 11

Customer name: same as job page 11

Order no: same as job page 11

Job address: same as job page 12

Contacts: same as job page 12

Job Notes: same as job page 12

Recurrence: Whether you would like this job to be created, daily, weekly, monthly or yearly.
Frequency: Here you can set how often the job should occur, the days of the week to occur on, the days of the month to occur on or the month to occur on depending on previous settings.

Delay start: This can be used if a contract is not due to start for a few months.

Expiry date: Can be added so that you don't continue attending when the contract expires.
Schedule: This is whether the job will automatically create a real job and display in the calendar and job list and push to the app.

Schedule: This is whether the job will automatically create a real job and display in the calendar and job list and push to the app.
We will only create a real job for the next visit if "Next recurrence to be scheduled automatically" is selected.
If "All recurrences require confirmation from the calendar" is selected it will require confirmation from the calendar, this means you will need to create a real job from the calendar by clicking on the job and confirming the visit. Until a real job is created it will not appear in the mobile app.

Tips

Jobs will only display on the app and job list if a real job is created.

You can add charges, files and photos to recurring jobs so all future visits will have these already added.

You can add job forms and/or custom fields as checklists and make it compulsory for all future visits. This can be used to remind staff to update service dates etc.
When adding in a monthly visit ensure it falls on a working date by selecting the first "MONDAY" of every month.

When a recurring job is edited from the recurring list it will affect all future visits, all current visits that have been made into a real job will remain unchanged.

Inside a project

Project 1652 for Bill Murray

Details

Project Title [?] Project # 1652
Security system

Customer Name
Bill Murray [change]

Order No
QUOTE #4796

Site
Main Site [Add New Site](#)

Project Address [✎](#)
1600 Pennsylvania Avenue Northwest
Washington
District of Columbia 20500
United States [Map](#)

Test Last3 [✎](#)

Mobile [✎](#) 212764800
Phone 21 21 21 21 950030

[+ Add contact person](#)

Job title: Same as job page 11

Customer name: Same as job page 11

Order no: Same as job page 11

Job address: Same as job page 12

Contacts: Same as job page 12

Project notes: Same as job notes page 12

Visit data: Same as job page 12

Visits: Same as job page 12

Assign workers: Assigned workers will see the project on their mobile App and will be able to start working on the project at any time. Assigning a worker does NOT make that worker 'Busy' and other jobs can be booked for them. Any project assigned to a worker will automatically create a new visit each time the started button is clicked. Assigned visits have no time and date and are normally used for a worker that has ongoing work which might last for months or years.

The screenshot displays the iTrade software interface for a project titled "Project 1652 for Bill Murray". The top navigation bar includes various menu items like CALENDAR, JOBS, ESTIMATING, CUSTOMERS, SUPPLIERS, MATERIALS, MAP, REPORTS, STAFF, TIMESHEETS, SETTINGS, DEV, and MORE. A search bar on the right allows searching for "all of iTrade".

The left sidebar contains a navigation menu with options: Details, Visits, Assign Workers, Charges, Files and Photos, Forms, Certificates, Custom Fields, Invoicing, Profit, Misc, Job Card, View Log, and Analysis Report. At the bottom of the sidebar are buttons for "Add Schedule", "Add Variation", "Options", and "Exit".

The main content area is divided into three sections:

- Visits:** A table with columns: No, Worker, Start Date, Start Time, Duration, Visit Type, Copy, Status, Email, SMS, and Delete. It shows two rows:

No	Worker	Start Date	Start Time	Duration	Visit Type	Copy	Status	Email	SMS	Delete
1	Shayne	Thu 02 Jun 2022	10:45am	1.00			Completed			
2	Unassigned		7:00am	1.50			Revisit			

 Below the table are buttons for "+ Visit" and "+ Multiple Visits".
- Assign Workers:** A section with a heading "Assign Workers" and a sub-heading "Assign Workers:". Below this is a list of checkboxes for various workers: Shayne, Demo worker, Bob, Pboo, Worker #2, Trainee, Itradedemo, Warda, Tester, Plumbing world, Smick, and Peter. All checkboxes are currently unchecked.
- Charges:** A section with a heading "Charges" and a sub-heading "Schedule 1 - Schedule #1". It includes tabs for "Time", "Materials", and "Both", and buttons for "Show Actuals", "Show Estimated", and "Show Both".

Charges: You can select to see time, materials or both. You can also select Show Actuals, Show Estimated or Show both. When a project is quoted showing both allows you to easily compare quoted items and items used. All charges will be assigned to a schedule, If you have multiple schedules you will be asked when adding charges on the app or from the supplier inbox which schedule you would like to charge to. When adding from the server end you can scroll and find which schedule you would like to add the charge to.

When adding charges to a **schedule** you can only add actuals.

When adding charges to a **variation** you can add estimates or actuals. Estimates can be added as you may have quoted this as an extra to the original job.

The screenshot displays the 'Charges' interface for 'Project 1652 for Bill Murray'. At the top, there is a navigation bar with various menu items and a search box. The left sidebar contains a list of navigation options, with 'Charges' currently selected. The main content area is titled 'Charges' and features a sub-header 'Schedule 1 - Schedule #1'. Below this, there is a table with the following data:

Code & Description	Quantity Est / Act	Buy Total Est / Act	Sell Total Est / Act	Margin % Est / Act	Invoiced
EXAMPLELABOUR Example Labour	0 / 100	- / 5,000.00	- / 6,460.00	- / 22.60	0
demo test demo test	0 / 10000	- / 20,000.00	- / 650,000.00	- / 96.92	0
Totals	0 / 10100	\$0.00 / \$25,000.00	\$0.00 / \$656,460.00	0.00 / 96.20	

Below the table, there are four buttons: '+ Add Time', '+ Add Materials', 'Set Margin', and 'Email Supplier'. Underneath the charges section, there is a 'Files and Photos' section which currently shows a placeholder image with a red 'x' icon, indicating a missing or failed image upload.

Files and photos: Same as job page 12

Forms: Same as job page 12

Certificates: Same as job page 13

Custom fields: Same as job page 13

Invoicing: Before we “Add New Invoice” we need to select whether we will be invoicing the Estimated amount or the Actual amount. Estimated amounts will be from our quote or in the case of a variation a quote or what was added in the charges as estimated. Actuals will be any charges added as actuals, this could be from the app, supplier inbox or server. Once you have selected estimated or actual your first invoice for that schedule will lock this option. This is to ensure correct quantities in the case of multiple invoices for that schedule if billing with line items.

Example you add 5 widgets and you invoice 5 widgets this week, add 6 more after the first invoice, when we create the 2nd invoice we will only charge the remaining 6. Total being 11. We display a total, invoiced and balance. Total being the total for the schedule, invoiced is what has been invoiced from this schedule, balance is the remaining amount. You can see the project total and invoice to date with the balance at the bottom.

The screenshot shows the 'Summary & Invoicing' page for Project 1652 for Bill Murray. The page is divided into several sections:

- Summary:** A table showing the project's financial status.

	Amount	Invoiced	Balance
Schedule 1 - Schedule #1	\$656,460.00	\$0.00	\$656,460.00
Project Total	\$656,460.00	\$0.00	\$656,460.00
- Invoice Selections:** A section where users can select how each schedule and variation is to be invoiced. For 'Schedule 1 - Schedule #1', the 'Actuals' option is selected, showing an amount of \$656,460.00. Other options include 'Estimated \$0.00', 'One Amount', and 'Itemised'.
- Invoice History:** A section indicating that no invoices have been created from this project. It includes a '+ Add New Invoice' button and a 'Payment Schedule' button.
- Profit and Loss:** Two tables showing financial data.

Profit & Loss		Profit & Loss As Invoiced	
Project Total	\$656,460.00	Invoiced to date	\$0.00
Actual Costs	\$25,000.00	Actual Costs	\$25,000.00
Profit / Loss	\$631,460.00	Profit / Loss	-\$25,000.00

Invoices to date: This will show you all the invoices you have sent or are in the process of sending. You can “Add New Invoice” to create an invoice. You can select invoice dates, due dates, invoice type (this is for Xero, select if you would like to send a “Draft” or an “Approved” invoice), invoice email (we will use the email from the customer account), Invoice reference, invoice notes you can import your notes from the “Project notes” section. Include payment schedule, and select the amount.

Amounts: Here you can select the schedules and variations you want to include on this invoice. You then need to select the amount of each schedule/variation to invoice or whether you would like line items displayed on the invoice. If you select line items on the invoice, you can adjust the

quantities and iTrade will record the quantity yet to be invoiced.

Note: If you select line items on the invoice, any additional invoices for that schedule must also display line items. If you select an amount to invoice, iTrade does not track which items have/have not been invoiced, and any future invoices for that schedule or variation will also need to be fixed amounts.

Invoice preview allows you to change quantities if “bill line item” is selected or show you the total amount to be invoiced for that schedule.

Files and photos can be added here to send with the invoice, or ones added in the project can be selected to “include on invoice”, A maximum of 10 files/photos can be selected.

You can now “Save & Exit” which saves this invoice and exits this screen, you can come back and edit the invoice. “Save & Send” will send the invoice across to Xero.

You can now edit or delete the invoice. If you haven’t sent to Xero you will also have the option to Push to Accounting.

Profit and loss: there are 3 sections to this. First is profit & loss for the whole project, this will display project total as selected from the estimates/actuals and will display your actual costs giving you your current expected profits. Breakdown gives you the breakdown of each schedule time and materials categories. Profit & Loss as invoiced will show you invoiced to date vs actual cost. This is used to ensure that you have invoiced out more than you have paid out.

Misc: Is used for internal notes and files, these can be pulled from a quote or notes added from the server end, these notes are not visible on the app.

Job card: Same as job page 13

View Log: Same a job page 13

Add schedule: This will add an additional schedule to your existing project.

Add Variation: This will add an additional variation to your existing project. Variations can have estimated and actuals added to them.

Options: If the job is in the current list you can move it to completed, unlike a job when someone marks the visit as complete we don’t move to the completed list, unless all visits are marked complete. Close, this will move the job to the closed list, this should only be done once the project is fully invoiced and complete.

Inside a template

Title: This is to name your template for future use, this will become the job title once a job is created from this template

Notes, charges, Files and Photos, Forms and Custom Fields will automatically populate a job created from this template.

Jobs module lists:

You can reorder the list by clicking on the text in the grey banner.

Status:

Revisit: This means the job requires a revisit, this revisit status can be set on the server or come from the app. If this job was revisited by the field worker there will be a revisit required note in the visit data section.

Dispatched: This means that the job/project has a worker, start date and start time on the primary visit.

Unassigned: This means that the job/project doesn't have a worker assigned to the primary visit.

On Site: This means that the field worker is currently onsite.

Started: This means that the field worker has started their job/project and is currently heading to site.

(empty): This means that there are no visits on the job/project

Green in this list is late, This means that the start time and date have passed.

Mustard means it was a customer added job or SMS response. (To set up so customers can add their own jobs please look at the customer section)

The screenshot shows the iTrade Jobs module interface. At the top, there is a navigation bar with tabs for CALENDAR, JOBS, ESTIMATING, CUSTOMERS, SUPPLIERS, MATERIALS, MAP, REPORTS, STAFF, TIMESHEETS, SETTINGS, DEV, and MORE. The JOBS tab is active. Below the navigation bar, there are filters for 'Current', 'Completed', 'Recurring', 'Closed', 'Templates', 'Job Forms', and 'Options'. A search bar and dropdown menus for 'All Workers' and 'All' are also present. The main table lists jobs with columns: Job #, Loaded, Booked, Name, Job Address, Job Title, Worker, Status, and Visit Type. The table contains several rows of job data, with some rows highlighted in green and others in mustard yellow.

Job #	Loaded	Booked	Name	Job Address	Job Title	Worker	Status	Visit Type
J-2011	16 May 2022	04 Jun 2022	Gte		test		Customer Loaded	
J-2010	16 May 2022	27 May 2022	Gte		test		Customer Loaded	
P-1640	17 Feb 2021		Aaron	58 Ambrose Street, Oran Park	Hot Water replacement - Revision 1		Revisit	
R-2071	04 Jul 2022	11 Jul 2022	Bill Murray		Vcxbxcvb		Revisit	
J-1984	11 Apr 2022		Gte		Carpet Clean part order 11/04		Revisit	
R-2028	28 May 2022		TEST 1		test		Revisit	
J-2051	16 Jun 2022	11 Jul 2022	Cash Sales Account test custom			Shayne	Revisit	
P-1652	08 Mar 2021		Gte				Revisit	
P-1926	01 Feb 2022		Gte		Office travel		Revisit	
J-1147	24 Jul 2019	14 Jun 2022	Frank Spencer	91 Kamo Road, Kensington, Whangarei	New wiring in basement	Peter	On Site	
J-2052	16 Jun 2022	11 Jul 2022	Cash Sales Account 1234			Shayne	Started	
R-1874	08 Oct 2021	14 Oct 2021	Bill Murray	10 Rowan St, Wangaratta, Victoria		itradedemo	Dispatched	
R-1911	12 Jan 2022	17 Jan 2022	Bill Murray		Vcxbxcvb	itradedemo	Dispatched	
P-1474	04 Jul 2021	08 Mar 2021	Bill Murray		Hot Water replacement - Revision 1	itradedemo	Dispatched	

Current:

This is a list of all your jobs still to be completed. This would be your bookings list.

Search and filter: Here you can search your current job list. You can also apply a filter to show jobs, projects or recurring.

Job # Column will display the job/project number, If it has a J before the number it's a job. If it has a P it's a project. If it has a R it's recurring.

Loaded: Will display who loaded the project and on which date. It will display their initials and colour that is set up in the staff module

Booked: Will display the booked time for the primary visit.

Name: This is the customer's name.

Job address: This is the job address.

Job title: This will display the job title, you can update this in the job/project.

Worker: This is the worker assigned to the primary visit.

Status: Displays the status of the primary visit.

Visit type: This is the visit type for the primary visit. To change this go into the job/project and change on the primary visit.

Tips

All columns can be ordered by clicking on the column heading.

Update job title to say, Left message, waiting on part ordered **/**/**, collect part from suppliers on way, etc

Primary visit : The primary visit can be found by the little green dot next to the visit number, within a job/project.

Completed:

This is a job list of all the jobs with the status marked as completed. This is most likely going to be your invoicing list.

Columns are the same as Current on page 18.

Recurring:

This is a list of all your recurring jobs.

Title: This will display the job title, you can update this in the recurring job which will change all future created jobs.

Customer Name: This is the customer's name.

Job Address: This is the job address.

Worker: This is the worker assigned to the primary visit. If no worker is assigned it will be blank.

Frequency: This will display the frequency of the job. Eg: Every week on Monday.

Next Due: This will display the next date for a job to be scheduled.

Auto Schedule: This will display if the job will auto schedule. This is whether the job will automatically create a real job and display in the calendar and job list and push to the app. We will only create a real job for the next visit if "Yes" is displayed. If "No" it will require confirmation from the calendar, this means you will need to create a real job from the calendar by clicking on the job and confirming the visit. Jobs will only display on the app if a real job is created.

Tips

Changing the recurring job will only update future created jobs.

Any job already created will only update that job. To edit the recurring job for future visit go to "recurring" select the job and change.

Closed:

This is a list of all jobs or projects that have been closed off. This list will continue to grow. If a job hasn't been exported it will appear in beige.

Job # Column will display the job/project number, If it has a J before the number it's a job. If it has a P it's a project. If it has a R it's recurring.

Data Added: This was the date the job was added into the system.

Date Completed: This is the date that the job was completed.

Name: This is the customer's name.

Job address: This is the job address.

Job title: This will display the job title, you can update this in the job/project.

Order No: This will be the order number added to the job/project.

Total: This will display the total for the job/project as invoiced.

Exported: This will display the date that invoice was sent to Xero

Templates:

This is where you can set up templates for standard jobs you complete. This could be service type work or work where a form or custom fields should always be compulsory.

We will display a list of all your current templates, they can be edited from here for all future visits.

Job Forms:

This is where you can create job forms. Job forms can be used for multiple things such as service checklists, JSA, audit forms and more. Once a job form is completed it will be stored in the forms tab of a job/project where you can preview the form or attach it to include with the invoice. Forms can be made compulsory on all or individual jobs or projects.

To create a form select "New Form" give it a name

Once you have created a form you now need to add a "label". Each label will require a type.

You can also add sub headings within a form.

Types:

Text field: This will display a text box on the app to be filled out.

Date picker: This will allow a date to be picked.

Yes-No-N/A: This will allow a yes, no, N/A answer to be selected.

Force YES: This will only allow a yes option to be selected.

List creator: This will allow a list to be created, this is ideal for hazard lists etc.

Tick box: This can be used to select/tick items.

Show this form on all jobs: Selecting this option will display this form by default on ALL your jobs and projects. It can still be manually changed on specific jobs and projects. Showing forms on jobs and projects means they are visible on the App but field workers are not required to complete them unless they are also set to compulsory.

Make this form compulsory: Selecting this option will make this form compulsory on all your jobs and projects which means field workers will be forced to complete the form before they can complete the job. It can still be manually changed to non compulsory on specific jobs however by default this form will be compulsory.

Requires a Signature: Selecting this option will require the form to be signed in the field -provided one or more fields in the form are compulsory. If none of the fields in the form are set to compulsory a signature will not be required.

Options:

In the options section you can set default options:

CALENDAR **JOBS** ESTIMATING CUSTOMERS SUPPLIERS MATERIALS MAP REPORTS STAFF TIMESHEETS SETTINGS DEV MORE ▾ Search all of iTrade

Current Completed Recurring Closed Templates Job Forms **Options**

When adding TIME on jobs

Show the date in the description
 Show the name in the description

Text for Booking Confirmation Emails

Dear {JOB_CONTACT_1_FIRST_NAME},

Thanks for choosing {YOUR_COMPANY_NAME}, below are the details of your booking confirmation with us. If for any reason this date and time no longer suits please contact us immediately by replying to this email or call us on {COMPANY_PHONE_NO} otherwise we will see you then.

YOUR BOOKING DETAILS:
At: {START_TIME}
On: {START_DATE}
Site: {SHORT_ADDRESS}
Job No: {JOB_NUMBER}
Order No: {ORDER_NUMBER}

Available place holders: {JOB_CONTACT_1_FIRST_NAME}, {YOUR_COMPANY_NAME}, {COMPANY_PHONE_NO}, At: {START_TIME}, On: {START_DATE}, Site: {SHORT_ADDRESS}, Job No: {JOB_NUMBER} and Order No: {ORDER_NUMBER}

[Restore default text](#)

Reply to email address

Text for Booking Confirmation SMS Messages

Hi {CONTACT_FIRST_NAME} {YOUR_COMPANY_NAME} are coming
At {START_TIME}
On {START_DATE}
To {SHORT_ADDRESS}
Any questions pls reply

Available place holders: {CONTACT_FIRST_NAME}, {START_TIME}, {START_DATE}, {SHORT_ADDRESS} and {YOUR_COMPANY_NAME}

[Restore default text](#) SMS messages cost \$0.10 each

Send booking confirmation SMS/TXT automatically

Send SMS/TXT replies to email:

Cancel Save

Job Options

Notes: Copy field workers notes into the main Job/Project notes field. This option when selected will push all the visit notes from the field workers notes into the Job/Projects notes field.

Times: Copy the workers time into the Job notes field when the Job is returned from the App.
Duration: This is the default duration for a visit.

Signatory Statement: The text to be shown when a customer signs a job in the App.

Visit Types: These visit types can be selected in the visit section of a job, these can be to inform the worker what type of work they might be completing on the job. You can add unlimited visit types to suit your needs.

Show Job Charges on field workers App: This option will allow the worker to see in the charges section on the app if charges have been added

When adding TIME on jobs: These options are for inserting the worker name and date into the description section. E.G “On Site Labour Hire 1st Yr, (8 Jul 2021 Bob)”

Text for Booking Confirmation Emails: This is the default text to display when sending email confirmation booking for the visit section of a job or project.

Reply to email address: This is the default email that all replies will be sent to.

Text for Booking Confirmation SMS Messages: This is the default text to display when sending SMS confirmation booking from the visit section of a job or project. Please note, additional charges apply for text messages. You can also set a default email address for sms replies. Any SMS that is replied to will cause a pop up to be displayed on the top right. If the reply is from a visit text we will add the text message reply in the job notes and display a banner at the top of the job or project next time it is opened.

Internal Emails: This is used as a reminder about jobs or projects.

Default Invoice Type: This is used for when we send the invoice into Xero. Draft will go into Xero as a draft and require approval before being sent to the customer. Approved will go into Xero and be sent to the customer from Xero.

Job Card Options: This is for information you want to show or hide from a job card.

Tips

Always ensure you click “Save” to save any settings you have changed.
By using visit types you can prioritize jobs or order jobs by a custom label.

Estimating

Estimating is where you produce estimates or quotes for customers. You can also create templates and/or schedules to make quoting faster.

Quote #	Customer Name	Quote Address	Quote Title	Emailed	Opened	Accepted	Booked	Amount
524	Shayne Dodd	123 /fake road fake suburb	General Proposal - Revision 6				Mon 30 May	\$8,205.80
525	Shayne Dodd	123 /fake road fake suburb	General Proposal - Revision 7			Thu 02 Jun	Thu 02 Jun 2031	\$8,205.80
526	Shayne Dodd	123 /fake road fake suburb	General Proposal - Revision 8					\$265,751.00
527	Bill Murray	1600 Pennsylvania Avenue Northwest Washington	Quote					\$0.00
528	Unknown1	32c Fortunes Rd Half Moon Bay	General Proposal				Thu 23 Jun 2061	\$85,807.50
529	Shayne Dodd	123 /fake road fake suburb	General Proposal - Revision 9					\$8,205.80
530	Customer 1	56 Pitt Street Sydney	General Proposal					\$8,269.19
531	Shayne Dodd	123 /fake road fake suburb	General Proposal - Revision 10					\$8,205.80

New Quote

There are multiple places you can create a quote from. At “Estimating” then “Current” or at a customer’s account.

To create a quote click, new quote. Then you will need to select the customer and choose which site the quote is for. You can choose if you would like to create a quote or estimate and if you would like to use an existing template or create one from scratch.

Quote title: This field is to name this quote, it’s not actually part of the quote.

Customer Name: Is the customer the quote is for.

Details: This will show who first loaded the quote and when it expires

Quote address: Is the site the quote is for.

Contacts: Will be displayed below the map and address. You can choose when adding contacts to a customer to include in all jobs/projects, this will automatically add them to every job. You can add up to 6 contacts per customer. Any contacts added directly on a job/project will only appear on that job/project. If you would like a contact on all future jobs/projects make sure you add them in the customer’s account. Contacts added here will appear on the iTrade Pro app.

Price Options: This will allow you to display the quote in different formats to the customer.

Tax Options: Will display different tax options to your customers.

Introduction: Is where you can introduce your business.

Scope and Pricing: this is where you add schedules, you can add a saved schedule or use a blank one. You can add as many as you like. Schedules are a list of what you will be providing to your customer, Its “The what’s in it for me” bit.

Exclusions & Notes: This is where you tag out anything not included in your quote/estimate.

Footnotes: Are normally used to add a sign or explain warranties etc.

Attachments: These are the attachments you uploaded in the options section and that you would like to include in the quote, you can also set always attach in the options section to include things like your terms and conditions.

Specific Attachments: Are for this quote only. Later you can pushl all attachments to the job/project.

Visits: Are used to book in a time and date on the calendar to attend the quote/estimate.

Misc: This section is used for your use only. Anything uploaded here isn’t seen by the customer.

Side Menu:

View Log: This will show if information has been changed and by whom.

Style: This allows you to select either contemporary or traditional which effects the layout of the quote.

Preview: Will show a PDF of the quote as the customer would see it.

Email: Will allow you to send the quote to the customer, you can add multiple email addresses, you can change the subject and the email text. You can edit the reply address and choose whether you would like to send the customer a PDF, or email a link. If you send a link we can see if the customer has opened the quote. The customer can also approve the quote and accept your terms of trade online, as well as choose options or comment. You can also preview what your customer sees.



Options:

CALENDAR JOBS ESTIMATING CUSTOMERS SUPPLIERS MATERIALS MAP REPORTS STAFF TIMESHEETS SETTINGS DEV MORE

Current Archived Templates Schedules Options

Defaults Attachments Supplier Logos Save

Show price as

- One total price
- One price per schedule + combined total
- Separate TIME and MATERIALS totals
- Itemised MATERIALS list, one price
- Itemised MATERIALS list, one price per schedule
- Itemised MATERIALS list, itemised pricing
- Itemised TIME & MATERIALS, one price per schedule
- Itemised TIME & MATERIALS with itemised pricing

Tax

- No GST
- Show GST exclusive totals only
- Show GST inclusive totals only
- Show GST exclusive, GST Amount and GST Inclusive Totals

Email Reply Address

shayne@itrade.net

Reply to email address for quotes and purchase orders

Always email a copy to this address

Default Email Wording

Dear {CONTACT_FIRST_NAME},

Thank you for allowing us to prepare this {ESTIMATE_OR_QUOTE} for you.

{VIEW_BUTTON}

We look forward to hearing from you.

{YOUR_COMPANY_NAME}

restore default text

Available place holders {CONTACT_FIRST_NAME}, {ESTIMATE_OR_QUOTE} and {VIEW_BUTTON}

Text Size

Medium

Create project: Will create a project from the information in the quote. You can select which information you would like to populate in the project.

Create job: Will create a job from the information in the quote. You can select which information you would like to populate in the job. You can only create a job if the quote has only 1 schedule as multiple schedules are not supported in jobs.

Lock: This will lock the quote which means it's no longer editable.

Revise: Will create an exact copy for the quote, only the loaded date, quote no and expiry will be updated.

Insert Template: This will override all information currently in the quote and insert the template.

Create Template: Will use the information in the current quote to create a new template.

Project variation: Will insert this quote as a variation into an existing project for that customer.

Archive: This will move the quote from the current list to the archive list and will deactivate the quote link.

Tips

It is recommended to have schedules and templates for your common quotes.

You should always have a template for general proposals, this way all your exclusion and introduction, footnotes and supplier logos are always attached and you don't need to type them out each time.

Set up auto archive to keep your current list current.

If quotes have a "booked date" they will be considered "Won".

If quotes that are accepted online will stay Teal until they are looked at.

Always send as a link rather than a PDF this way customers can select options and see the updated price instantly and can accept online. This also allows us to see if they have opened the quote.

Current

This is a list of all the current quotes in the system, quotes that have expired may also display here. Anything in this list will be used to calculate the Won section at the top. This will display how many quotes you have won vs quoted. A quote is considered won once it has been Booked. This means a job or project has been created from the quote. From here you can add a quote or search existing quotes. You can also reorder the list by clicking on the headings in the grey banner.

Quote #: Is a quote unique number.

Customer Name: This is the customer's name as it appears on the customer account.

Quotes address: This is the address the quote is for.

Quote title: This is the title of the quote. You can rename quotes inside the quotes.

Emailed: This is when the quote was emailed to the customer.

Opened: This is when the quote was opened by the customer, provided it was sent to the customer as a link.

Accepted: This is the date the quote was accepted, provided the quote was sent as a link.

Booked: Is the date the job/project was created from the quote and the job/project number, you can click the number to access the job/project.

Amount: Is the total amount of the quote including any tax.

Tips

Set up a general template to use for all quotes to ensure you have an introduction and sign off.

When you have more than 1 schedule in a quote you can only create a project.

Archived

This is a list of all your archive quotes. From here you can add a quote or search existing quotes. You can also order the list by clicking on the headings in the grey banner. Anything archived will not allow a customer to open the link anymore. If a quote has been archived and you need it back please use revise to get it back into the current list. This will create an exact copy of the original quote apart from quote number, expire date and loaded date.

Templates

This is where you can create a template to use for quotes or edit existing templates.

Schedules

This is where you can create a schedule to insert into a quote or edit existing schedules.

Options

Show Price as: You can select how you would like to display your quotes. The defaults set here can be changed on any quotes.

Tax: Option can be selected here, this default can be changed on any quote.

Email Reply Address: This email address will be the reply email address for quote.

Default Email Wording: This will be the body of the email sent.

Text size: Choose your preferred font size for your quotes.

Expiry: The default expiration date.

Expiry reminder email: Will send out a reminder with the information you have filled out.

Archive: You can turn on auto archive to keep the current list clean.

Margin: You can set minimum margins and apply the rule to all quotes.

Create options: You can choose if you would like to be able to create projects and jobs or both from your quotes. Remember any quote with more than 1 schedule will only be able to create a project.

Attachments: Here you can upload files you would like to attach to your quote, you can also set to always attach for things like Terms of Trade.

Supplier Logos: You can upload logos that you would like to attach to your quote, E.g: Trade association logos, Supplier logos.

Customers

Current

This is a list of all your current customers.

Archived

This is a list of all your archived customers

Custom Fields

Customer Custom Fields

These Custom Fields are designed to record information on products you supply and install for your customers. Examples include installation date, make, model, serial number, location of specific items, Zone Lists, Technicians Name.

Do not use these fields for maintenance (reminders) purposes as these should be recorded at the customers details page.

On this page you create all the fields you need to suit your business. You can then enter the specifics at each Customers account AND any details entered on Jobs by your Field Workers will update the corresponding Customers account details. You also have the option to make individual fields compulsory on a job or on a job template forcing your Field Workers to enter various details when they complete the job - so nothing gets forgotten!

Label	Type	Option
Model	Text field	View & Edit
Install date heat pump	Date picker	View Only
Service date HP	Date picker	View & Edit

+ Label + Sub Heading

Show this group on all Jobs

+ New Group

Custom fields are used to record information on products that you install. Create fields here that then allow you to enter the specifics in each customer's account. These fields will also attach to each site. This can include things like alarm data, model, serial numbers, zone list and anything else you would like to record.

To create a custom field click the new group. Give the group a title Eg, Air Conditioner. You can now add subtitles Eg, Air Conditioner 1, 2 and 3 etc. You can also add labels, this is where you will fill out the information you would like to record for that site. Labels types that are available;

Text Field: This will give you a box to type information into, Eg serial numbers

Date Picker: This will give you a box to populate a date, Eg Install date.

Yes-No-N/A: This allows yes, no or N/A to be selected.

Force YES: This only allows you to select yes.

List creator: Allows you to create a list. Eg, zone list.

Tick Box: This allows you to tick a box, this could be a checklist, etc.

Show this group on all jobs. Which will display information on every job you create and will also push into the app.

Once in a Job or Project, you can select to make it compulsory.

Tips

Create a job template to include custom fields you would like to include, for things like Air conditioning installation, Alarm installs. This way you can have the install date, serial number and model number marked compulsory.

Custom fields are also a good place to record warranty information that was current/applicable at the time of installation.

Reminders

The purpose of Maintenance Reminders in iTrade is to send your customers an email reminding them that the maintenance of the products that you have installed for them is due, or will be due shortly.

Start by adding a suitable Maintenance Reminder TEMPLATE to suit your business, for example; "Alarm System Maintenance", "Gas Heater Maintenance", "AC system maintenance" "CCTV Maintenance" etc. You can have multiple templates if your company installs different product ranges, like Alarms and CCTV systems or Gas Heaters and Gas Hot Water systems.

All Templates have a "Name", a "Repeat" cycle and an email subject and body. When you select the "Add a Maintenance Reminder Template" we insert very basic default information into the email, we recommend you modify this to suit your needs. Once you have created one or more templates they will display on the 'Details' page of every customer and site in your iTrade account.

Then all you need to do is enter an applicable date in the customers account when you install a product. The date you enter will be the date that the next email will be sent to your customer. When that email gets sent, the displayed date will rollover to the next date based on your

The screenshot displays the iTrade software interface for Customer No. 656 Shayne Dodd. The top navigation bar includes tabs for CALENDAR, JOBS, ESTIMATING, CUSTOMERS (selected), SUPPLIERS, MATERIALS, MAP, REPORTS, STAFF, TIMESHEETS, SETTINGS, DEV, and MORE. A search bar on the right contains the text "Search all of iTrade".

The left sidebar contains a navigation menu with options: Detail, Sites, Active, Notes, Files and Photos, Custom Fields, Certificates, Login, Invoices, History Log, and buttons for New Job, New Project, New Quote, New Invoice, Cancel, Options, and Save.

The main content area is divided into several sections:

- Account Details:** Account Number (656), Marketing Source (google), Customer Type (elec).
- Pricing Options:** Price Level (Sell 1), Material Discount (10%), Labor Discount (0%), Labor 1 Override (\$ 0.00), Invoices Due (7 day(s) after the invoice date).
- Maintenance Reminder - Annual Service:** Next Send Date (Thu 29 Apr 2032), Repeats (Every 12 months), Last Sent (Fri 29 Apr 2022), Sending To (shayne@itrade.net).
- Maintenance Reminder - Service:** Next Send Date (empty), Repeats (Every 6 months), Last Sent (Wed 20 Oct 2021), Sending To (shayne@itrade.net).
- Sites:** A table listing sites with columns ID #, Site Name, and Physical Address.

ID #	Site Name	Physical Address
3	Fake Road	123, fake road, fake suburb, Fake, 3010
12	27 Hamlet Street	27 Hamley street, Woolloowin
24	test	

selected “Repeat” cycle, or it will be empty if there is no repeat cycle. If you prefer to ‘Manually’ update dates after a customer has their maintenance done, leave the “Repeat” cycle set to none and simply enter the next date directly in the customer’s account.

Customer maintenance reminder email dates, (next and last sent) are displayed in jobs on the field workers App at the “Forms” tab. Enter an email subject and appropriate text in the email body. You can use the displayed placeholders to insert data into your emails, for example; ‘customer full name’, ‘Contact name’ and the ‘address’ of the property (very important if your customer is a property manager or has multiple branches).

Each template can have a follow up email optionally set. It is good to add this because a lot of people don’t respond initially, so a reminder can be worthwhile. Automated reminders are emailed to ALL contacts in the customer’s account that have “Include in Maintenance Reminders” selected. You can edit this for each/any contact at any time. The emails we send include an “Unsubscribe Link” which, if selected, will automatically remove that contact from receiving any future automated reminders. If you attempt to re-enable reminders for a contact that has previously unsubscribed, you will be warned.

Tips

Set up reminders to ensure you get repeat work from your customers. This will also be an opportunity for the customer to get other work done. Consider making or offering extended warranties based on having regular maintenance undertaken, this encourages great uptake and repeat business.

Options

In here you can set marketing sources, add or remove any you would like. You can also create customer types. You can make these mandatory when you next open a customer, you will need to ensure information is in these fields.

With these fields you can run a report in the “Reports” tab. This will show you where your customer came from, and show a breakdown of turnover for each division of your business.

Eg, you run 3 advertising campaigns. One T.V one Radio and Newspaper. You can now run a report to check which one was most effective. You can also filter by customer type. This means you can see what kinds of customers you got from each campaign.

Invoices

This will be a list of all invoices created for all your customers. You can search for invoices from here for all customers. You can also add invoices or export an invoice. Note: you can select an invoices tab inside a customer’s account to view just that customer’s invoice.

Inside a customer’s account

When inside a customer account you can add a New job, New Project, New Quote or a New invoice. We can view the history about this customer and change or update any details. When you update a customer in iTrade we automatically update your Xero account.

The screenshot displays the iTrade software interface for a customer's account. The top navigation bar includes tabs for CALENDAR, JOBS, ESTIMATING, CUSTOMERS, SUPPLIERS, MATERIALS, MAP, REPORTS, STAFF, TIMESHEETS, SETTINGS, DEV, and MORE. A search bar is located on the right side of the top bar. The left sidebar contains a menu with options: Detail, Sites, Active, Notes, Files and Photos, Custom Fields, Certificates, Login, Invoices, and History Log. The main content area is titled "Details" and shows the following information:

- Full Name or Company Name:** Shayne Dodd
- Physical Address:** 1600 Pennsylvania Avenue Northwest, Washington, District of Columbia 20500, United States
- Postal Address:** No Address, [Click to edit](#)
- Contact Information:** Shayne Dodd, Email: shayne@itrade.net, Mobile: 555 1234

A map of Washington, D.C. is displayed on the right side of the details section. At the bottom, there are sections for Account Details and Pricing Options.

Full Name or Company Name: This is the customer name as it will appear on jobs or projects and push into Xero.

Physical Address: You can also add building/unit/apt to help the workers find the address, This part isn't included in the google address search. Once you start typing into the street box we will populate the data as per google maps.

Postal Address: This will push into Xero.

Contacts: You can add or edit any contact in here, You can add, First Name, Last Name, Title, Email, Mobile, Phone, Phone alt, Fax and notes. All this information will push into the app for the worker to see. In each contact you will have some additional options. Include in jobs or projects, Include in Quotes, Include when emailing, Include in Maintenance reminders emails and Make this person the primary contact. 1 person must always be the primary contact.

Account Details: Account number, billing emails, marketing source, customer type.

Pricing Options: In here you can set price level for the customer, add materials discounts, add labour discount, have labour 1 overrides and invoice due

Maintenance Reminder: This is where you can view any automatic reminder or update them to ensure they are sent to customers

Sites

Sites are for customers who have multiple addresses. This could be property managers, developers or business customers like banks or chain stores. Within a site you can have notes, files, history and custom fields. Meaning each site has its own records. Sites can be turned into customers should the property be sold.

Active

This will show all active jobs, projects and quotes for the customer including any sites. You can merge jobs from this list. Merging a job is done if 2 or more jobs are created for the same thing. Some users merge all customer's jobs at the end of each month.

Notes

Pop up Note, this is a note to pop up when a customer is opened, This note could be a warning about payment, or to send a certain worker or possibly to avoid sending a particular worker.

Site Notes, this is where you can store parking instructions and gate codes. This information can be viewed on the app in the site note section.

Files

Customer files: This is where you can store files about this customer, such as a new customer contract, terms or trade that have been signed.

Files & Photos added via Jobs and Projects: This will show all files and photos for every job or project for that customer.

History

This will store all your job, projects and quote history. This will also show who created or edited sites or customer information.

Custom Fields

This is where the customer's unique information is stored. As per what you set up in the custom field section.

Certificates

Currently iTrade offers Electrical Record Of Inspection, CoC's, ESC and Gas Safety & Compliance Certificates for use in NZ and electrical certificates for Queensland and Gas Certificates for the United Kingdom. If you would like an additional certificate created for your business please email us support@itrade.net charges apply.

From here you can view and email any certificates that were created from that customer. You can edit any certificate that hasn't been completed.

Login

This is where you can set up customer logins. This will allow your customer to load their own jobs, view existing quotes, jobs and projects in progress. They can only see the job number, booked date, job address, job title, worker, status and visit type.

Invoices

This will show a list of all invoices for this customer.

Suppliers



Admin is logged into
iTrade Demo Company



CALENDAR JOBS ESTIMATING CUSTOMERS SUPPLIERS MATERIALS MAP REPORTS STAFF TIMESHEETS SETTINGS DEV MORE

Search all of iTrade

Current Archived Inbox Purchase Orders Invoices Options

Add Supplier Search Supplier

ID#	Name	Phone	Contact	Mobile	Email
25	Bunnings				
3	Electrical Services				
21	Electrical Suppliers Ltd	09 555 7741	Alison		testing@gmail.com
24	Google				
22	Voltex				

<< 1 >> Items count: 5

Add a supplier

To add a supplier, Go to the “suppliers” tab then “Add Supplier”. When you add a supplier we will ask for a “Materials Prefix” this will add a code in front of all supplier codes in your material database. This is done to avoid double ups of items as two suppliers might sell the same product.

Once you have added the supplier, you can populate Physical Address, Postal Address, add contact person, add purchasing codes, back accounts, tax rate and notes.

Current

This is a list of all your current suppliers.

Archived

This is a list of all your archived suppliers.

Inbox

This is where we can import CSV or PDF invoices and associate them with a job or project or leave them unassociated, you can also push the invoices to Xero to the suppliers account, to be paid.

When you receive the first email for a supplier you will need to associate that supplier's email to their account. This means in future all emails from that supplier will automatically be linked to their account.

The first CSV file from a supplier will also need to be field matched, What this means is the columns need to be matched to the columns in our system. You will be walked through this process. This only needs to be done once per supplier as we store this information against that supplier.

With a PDF you can simply fill out the information from the file and associate it to a job or project.

The screenshot shows the iTrade software interface. At the top, there is a navigation menu with options: CALENDAR, JOBS, ESTIMATING, CUSTOMERS, SUPPLIERS (highlighted), MATERIALS, MAP, REPORTS, STAFF, TIMESHEETS, SETTINGS, DEV, and MORE. A search bar is located on the right side of the menu. Below the menu, the 'Inbox' section is active, showing 'Inbox Address: demo@inbox.itrade.net' and 'Inbox' and 'Archived' tabs. A search bar and 'Show All' button are also present. The main content area is divided into two columns. The left column is titled 'Emails received from your suppliers...' and shows a date '23 Jun 2022' and a 'Manual Upload' button. Below it are 'Import Pricelist' and 'Archive' buttons. The right column is titled '...how we will process attached invoices' and shows two invoice entries. The first entry is for 'Plumbing World Limited' with invoice number 1900291-0, order number 'test', and total \$9.37. It has options for 'View Invoice', 'Process', 'Associate with job' (Unassociated), and 'Push to Xero' (checked). The second entry is for 'Plumbing World Limited' with invoice number 1900290-0, order number 'michelle test', and total \$31.87. It also has options for 'View Invoice', 'Process', 'Associate with job' (Unassociated), and 'Push to Xero' (checked). A URL 'https://login.itrade.net/index.php#' is visible at the bottom left.

Tips

We prefer all invoices in CSV format. This means we can extract line items and all other details with minimal input.

We highly recommend setting up this inbox as this can save you a considerable amount of time every week.

Email training@itrade.net to set up a training session on the supplier inbox if required.

Purchase orders

From here you can email purchase orders to your selected suppliers. We will also record all purchase orders sent out here. With the filter on the top right you can select individual suppliers or all. You can also search with the search bar function.

To create a new purchase order, click “New Purchase order” you will now need to select the supplier. You then give it a date, amend the purchase order number, and you can set your reference (We recommend you use job or project numbers).

Once in the purchase order you can add materials and files. You can take out pricing and change quantities as required. You can also preview the purchase order and email it to your supplier.

A notes field is also available for recording things such as delivery notes, site contacts details etc.

Invoices

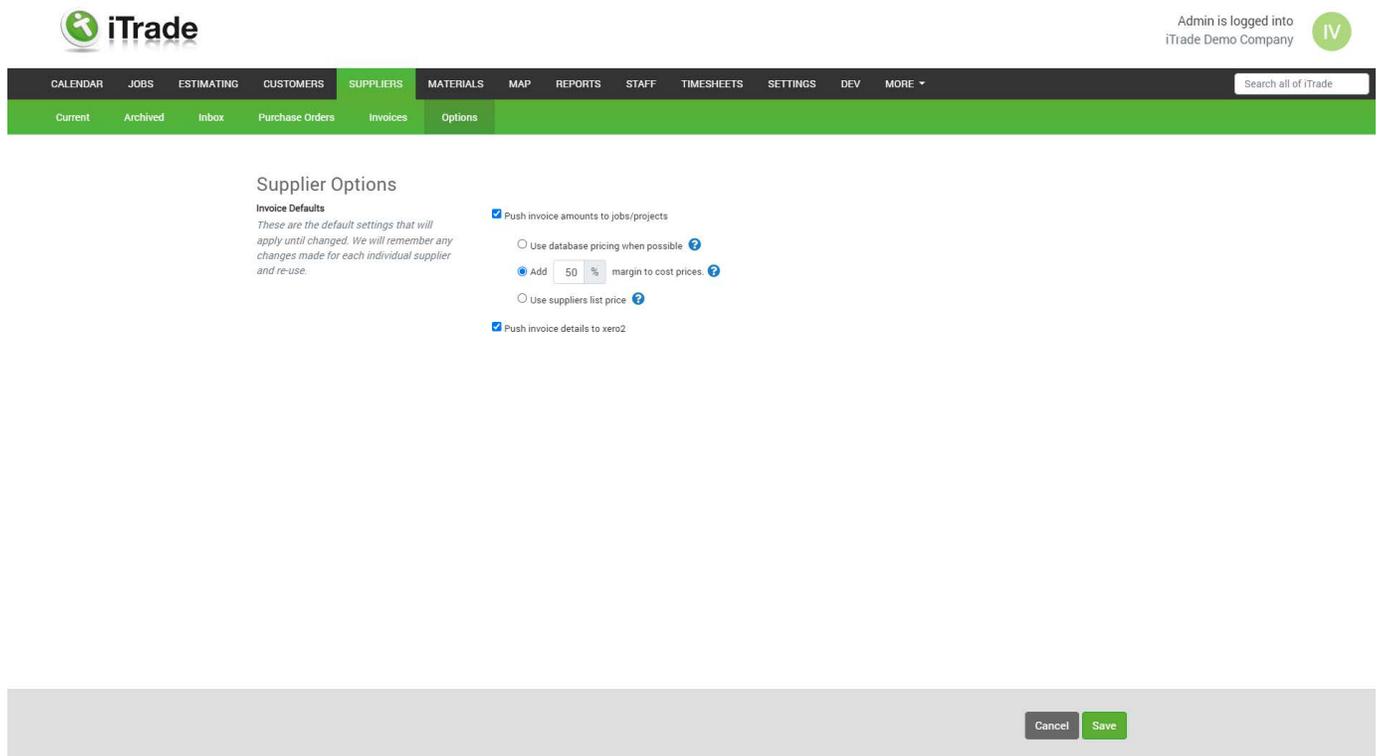
This will show all invoices that have been processed against any supplier. With the filter on the top right you can select individual suppliers or all. You can also search with the search bar function.

When you click on an invoice you can edit the invoice, copy selected items to a job, re-push to Xero or delete.

You can also scroll up and down the list as per the previous screen.

Tips

If you are looking for a particular invoice and you don't know the order number but you know the supplier, apply the filter in the invoice list. Then select an invoice and use the up and down to find the exact invoice.



Here you can select some default options for processing invoices in the inbox.

You can push invoice amounts to jobs/projects
With 3 options to select.

Use database pricing when possible: If matching supplier codes are found in your materials list for this supplier, we will use those prices on the job. If no matches are found, we will use the invoice LIST price.

Add -- % margin to cost prices: The sell prices shown on the job will be the cost prices from this invoice increased to reflect your chosen margin.

Use suppliers list price: The sell prices shown on the job will be the list prices from this invoice. You can check the invoices list prices using the “View Invoice” button.

Push invoice details to Xero: This will push the invoice into Xero to be paid and allocated against that supplier. This means at the end of the month when you get a statement you can reconcile in Xero.

Materials



Admin is logged into
iTrade Demo Company



Supplier Name	Suppliers Code	Description	My Code	Buy	Sell 1	Sell 2	Sell 3	App	□
Voltex	Vol-ZIN-2345	Zip-it® Nylon Drill Point - 100 Pack		46.57	93.14	77.62	93.14	●	□
Voltex	Vol-ZIN-2000	Zip-it® Nylon - 100 Pack		39.92	79.84	66.53	79.84	●	□
Voltex	Vol-ZIM-2346	Zip-it® Metal Drill Point - 100 Pack		55.19	110.38	91.98	110.38	●	□
Voltex	Vol-ZIM-1000	Zip-it® Metal - 100 Pack		44.52	89.04	74.20	89.04	●	□
Voltex	Vol-ZIN-2350	Zip-it® Junior (Nylon) - 100 Pack		21.12	35.20	35.20	42.24	●	□
Voltex	Vol-S300-W	White General Purpose Silicone - 300ml		9.80	19.60	16.33	19.60	●	□
Voltex	Vol-HDL9T90-WH	White Frame to Suit Voltex 90mm Monaco & 10mm Downlights		3.00	6.00	5.00	6.00	●	□
Voltex	Vol-SBF-36W	White Door Flush Mounting Switchboard 36 Way - Metal Back		111.35	222.70	185.58	222.70	●	□
Voltex	Vol-SBF-24W	White Door Flush Mounting Switchboard 24 Way - Metal Back		78.71	157.42	131.18	157.42	●	□
Voltex	Vol-SBF-18W	White Door Flush Mounting Switchboard 18 Way - Metal Back		53.05	106.10	88.42	106.10	●	□
Voltex	Vol-SBF-12W	White Door Flush Mounting Switchboard 12 Way - Metal Back		40.23	80.46	67.05	80.46	●	□
Voltex	Vol-WPS220	Weatherproof Switch - IP66 20A 2 Pole		10.90	21.80	18.17	21.80	●	□
Voltex	Vol-WPSS-16	Weatherproof Sunset Switch		74.75	149.50	124.58	149.50	●	□
Voltex	Vol-WS1-16	Weatherproof Single Switch 2-Way 1P 16A - IP66		22.04	44.08	36.73	44.08	●	□
Voltex	Vol-WPP1HS	Weatherproof single powerpoint - IP53 - Slimline		20.94	41.88	34.90	41.88	●	□
Voltex	Vol-WPP1H-15	Weatherproof Single Powerpoint - IP53 - 15A		23.62	47.24	39.37	47.24	●	□
Voltex	Vol-WPP1H	Weatherproof Single Powerpoint - IP53		18.14	36.28	30.23	36.28	●	□
Voltex	Vol-WPEE	Weatherproof Mounting Enclosure		19.06	38.12	31.96	38.12	●	□

To add materials click “Add Materials”, you can allocate a supplier for this material item, add supplier code, description, my code(for easier searching), Xero sales account, Xero Purchases account, Buy Price, Sell 1, Sell 2, Sell 3 and enable margin control for this item only (See margin control for more detail).

Misc:

Exclude this item from “Stock Usage” report: This will exclude this item from your stock usage reports. These reports are in the reports tab.

Exclude this item from displaying in the app: This means this item will not display in the charges section of the app.

Include Width & Height fields when selling: Will allow you to bill this item based on measurements, rather than quantities.

Add item to every new job. Qty: This is used to add service charges to every job, or any other item you would like always included on all your jobs.

Materials

This is a list of all your current materials. From the right hand side you can select the box and either click app or delete on the top. If you click the “app” button this will either remove the item from the app or add to the app. If you click “delete” this will delete the item from your materials database.

You can click an item to open it to edit.

Time

This is where you add time or labour items. These items, when added to a job or project, can be pushed into a workers timesheet. If added via the app these hours are automatically added to the workers timesheet.

To add a time item click “Add Time”, you can now add item code, description, Xero Sales Account, Xero Purchases Account, Buy Price, Sell 1, Sell 2 ,Sell 3 and labour type (This is used to populate the workers timesheet should they get paid more for after hours or callouts, etc)

Kitsets

To add a kitset click “New Kitset”, you will now need to give the kitset a description and Unique ID. You can now add your own code (for easy searching) and a Xero Sales Account.

You can add time items and material items to make up the kitset.

When you select “Use Manually Adjusted Pricing” This means the pricing will be locked. Should items that make up that kitset have a price rise the price of the kitset will remain the same. If manually adjusted pricing is not selected the kitset price will change to reflect the items making up the kitset pricing.

The screenshot displays the iTrade software interface for managing a kitset. The top navigation bar includes options like CALENDAR, JOBS, ESTIMATING, CUSTOMERS, SUPPLIERS, MATERIALS (selected), MAP, REPORTS, STAFF, TIMESHEETS, SETTINGS, DEV, and MORE. A search bar is located in the top right corner.

The left sidebar contains navigation options: Details, Time, Materials, and Totals. Below these are buttons for Cancel, Delete, and Save and exit.

The main content area is divided into several sections:

- Kitset Details:** A form with fields for Unique Id (GENIN), Description (General install), My Code, and Xero Sales Account (Please select an account).
- Time:** A table listing time items with columns for Code, Description, Qty, Buy, Sell 1, Sell 2, and Sell 3. It shows two items: EXAMPLELABOL (Example Labour) with Qty 5.00 and another with Qty 5.
- Materials:** A table listing material items with columns for Code, Description, Qty, Buy, Sell 1, Sell 2, and Sell 3. It shows one item: ELE-R1764 (Rinnai Galv 45Deg Bend) with Qty 10.00.
- Kitset Totals:** A summary table showing Buy, Sell 1, Sell 2, and Sell 3 prices. It includes a checkbox for "Use Manually Adjusted Pricing" and a table for Margin and Margin %.

Code	Description	Qty	Buy	Sell 1	Sell 2	Sell 3
EXAMPLELABOL	Example Labour	5.00	\$250.00	\$425.00	\$416.65	\$500.00
		5	\$250.00	\$425.00	\$416.65	\$500.00

Code	Description	Qty	Buy	Sell 1	Sell 2	Sell 3
ELE-R1764	Rinnai Galv 45Deg Bend	10.00	\$1,288.40	\$2,576.80	\$2,147.30	\$2,576.80
		10	\$1,288.40	\$2,576.80	\$2,147.30	\$2,576.80

	Buy	Sell 1	Sell 2	Sell 3
Time and Materials Totals	\$1,538.40	\$3,001.80	\$2,563.95	\$3,076.80

	Buy	Sell 1	Sell 2	Sell 3
Margin		\$1,538.40	\$1,025.60	\$1,538.40
Margin %		50%	40%	50%

Import

From here you can import your supplier's CSV files to your database. You can do this per supplier which is recommended, meaning deleting or updating that supplier's pricing is easier.

First you must get CSV files from your supplier. The required CSV format details can be found Here. We recommend asking for a cut down price book, as your supplier's full pricebook might have ten of thousands of items with similar descriptions. Most suppliers have an option for 1000 most used or recently purchased items.

You then need to field match the columns in the CSV to the appropriate field. If you require help with this just email us; support@itrade.net

You then select whether you would like to:

Import all items from the selected file

Or

Update pricing of existing items only

Do not display these materials on the mobile Apps. This is used to stop all items pushing to your field workers app. This is used to reduce the amount of items they have to select making it easier to find items.

Database

This allows for backing up your material database or restoring to a previous backup. You can also export your database. From here you can also delete all Materials from a selected supplier.

The screenshot shows the iTrade web application interface. At the top, the iTrade logo is on the left, and 'Admin is logged into iTrade Demo Company' with a user icon 'IV' is on the right. A navigation menu includes CALENDAR, JOBS, ESTIMATING, CUSTOMERS, SUPPLIERS, MATERIALS (highlighted), MAP, REPORTS, STAFF, TIMESHEETS, SETTINGS, DEV, and MORE. Below this is a sub-menu with Materials, Time, Kitsets, Import, Database (highlighted), Margin Control, and Options. A search bar contains 'Search all of iTrade'. The main content area is titled 'Materials Database' and contains four actions:

- BACKUP**: Create up to three backups that you can restore to if necessary. A table shows three backups:

Backup #1	Backup #2	Backup #3
Wed 15 Jun 2022 11:41	Wed 15 Jun 2022 10:41	Mon 13 Jun 2022 13:11
52837 Items	52837 Items	52836 Items
- RESTORE**: Restore your materials using one of the above backups.
- EXPORT**: Create a CSV of your materials.
- DELETE MATERIALS**: This function is used to Wipe Clean your materials database. You must have at least one backup first.

* Please note: Backups, Restores, Exporting & Deleting EXCLUDES time items.

Note

This is not a backup of your account, which is done automatically everyday for you. This is just a backup of your materials in case you want to undo something you have done.

Margin Control

Margin Control will automatically adjust your sell prices (provided “lock” has not been selected) whenever a Buy price changes.

Buy prices can be updated manually, during a price book import or when selecting “update pricing” from the supplier’s inbox when price increases are detected. In all of these instances, your sell prices will automatically adjust if Margin Control is in use.

Low prices will be increased to meet the set minimum margin while any high prices will be reduced to meet the set maximum margin.

First you need to enable margin control, now you can set our default margins. This will update every item in your material database to match these margins. You can set a minimum and maximum for each of your sell prices. To have an exact margin set both the Minimum and maximum to the same value.

Once we have enabled margin controls and set the defaults we can now do margin control per supplier and/or per material item.

To set up a margin control for a supplier, please select “Add supplier margin”, then we will select the supplier to apply this rule too, now we set the margins.

Any item uploaded to that supplier will have the margin control as per the rule set.

To add individual stock margin, you can select “Add individual stock margin” or this can be done in the item within the materials list, by using the “Create new margin control” option.

We will list out all the margin control rules so we can edit them as required. We can also delete rules we no longer require.

You can also disable margin controls in options.

Tips

Enable margin control to allow for all pricing to automatically update in your price book. This will help avoid low margins or selling items below cost.

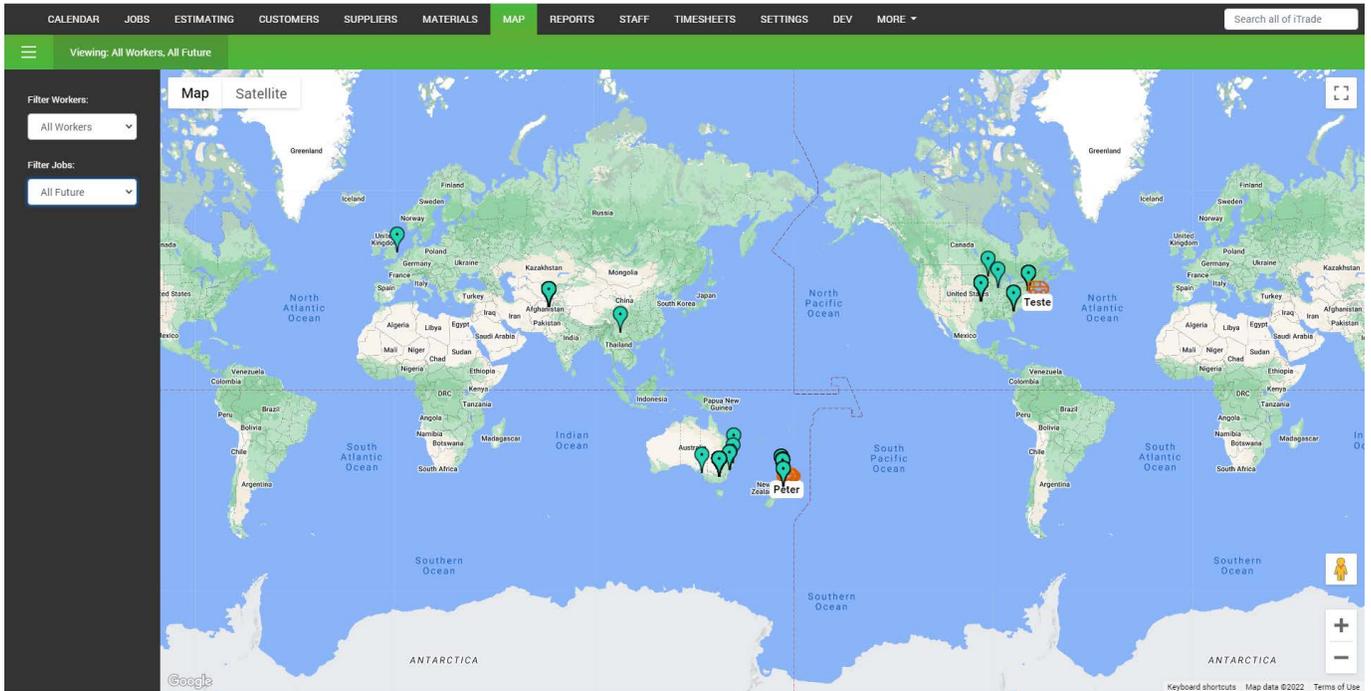
Options

From here you can rename your sell prices and labour types

Tips

Choices like “Retail”, “Trade” and “Builder” are quite common along with Normal, After Hours and callout for labour types.

Maps



From here you have a map view which you can sort into:
Todays Jobs
Jobs in progress
All current Jobs

Reports



Admin is logged into
iTrade Demo Company



CALENDAR JOBS ESTIMATING CUSTOMERS SUPPLIERS MATERIALS MAP REPORTS STAFF TIMESHEETS SETTINGS DEV MORE

Search all of iTrade

Customers Van Stock Usage Job Audit Analysis Manual Reminders Sent Emails Custom

Analysis Gross Profit

From Date

To Date

Options Only display closed jobs

[CSV Export](#) [PDF Export](#) [Preview](#)

Date	Job #	Total	Cost	Gross Profit	Margin %	Last Invoice date	Job Status
21 February 2019	1	\$271.54	\$117.54	\$154.00	56.71		DELETED
21 February 2019	2	\$0.00	\$0.00	\$0.00	0		CLOSED
21 February 2019	3	\$0.00	\$0.00	\$0.00	0		CLOSED
21 February 2019	1000	\$1,068.67	\$34.50	\$1,034.17	96.77		CLOSED
22 February 2019	1001	\$1,000.00	\$0.00	\$1,000.00	100.00		CLOSED
22 February 2019	1002	\$0.00	\$0.00	\$0.00	0		CLOSED
25 February 2019	1003	\$0.00	\$0.00	\$0.00	0		CLOSED
25 February 2019	1004	\$0.00	\$0.00	\$0.00	0		CLOSED
25 February 2019	1005	\$0.00	\$0.00	\$0.00	0		CLOSED

Customers

From here you can run a report for either customer by custom fields or customer by marketing source.

Van stock usage

This report is used for re-stocking your vehicles.

This report will show all items charged out from the app from each worker for the select period, items that have “Exclude from stock usage report” will be excluded.

Tips

Run this report weekly to restock vehicles to a pre-set level. This will also help identify any missing items. If a worker forgets to charge out an item they will have low stock in their vehicle and will hopefully be able to recall where the part was used.

Job Audits

This report will show jobs or projects that have been closed and by clicking on the job or project will show the job or project audit.

Job Audit: Will create a PDF copy of the job to include all information on the job including charges and GPS audits.

Analysis

Worker analysis

This will run a report for all workers for a selected time period. It will display charged hours, time, material, and a total and profit.

Sales Analysis

This will run a report for Marketing Source and Customer Type (as set in the customer account) for a selected period. It will display a total for each category.

Tips

Set up marketing sources and customer types. This will help when you run an advertising campaign to know where your customers came from, and to see if the marketing campaign is returning good results or not!

Quoting Analysis

This will run a report for all the quotes that have been done in a selected period. You can also filter by customer number and quote number. Leave the customer and quote number blank to include all.

Projects Analysis

This report will include current and closed projects that had any movement during this period. We recommend running this report AFTER all your supplier invoices have been associated to Jobs/Projects for the selected period. You can also run this report for selected customers. There is also a more detailed report found inside projects in the left hand side menu.

Work in progress

This report will show all jobs or projects that are in your current list. This report excludes Jobs and Projects where the primary visit is Completed

Manual Reminders

From here you can see all manual reminders you have sent or create a new reminder or Create a new Default text to insert into any reminder. These reminders can be used for company shut down periods eg, christmas hours. They can also be used to select certain custom fields to send out reminders for replacement or servicing. However the Automated reminders are better as you only need to set them once.

New Manual Reminder

Here you can select date fields from your custom field. You can also select a date range. This will pick up any date in the custom field within that range. Or you can select send to "all customers" which is used for newsletters, etc.

Sent Emails

This will be a list of all your emails sent out from iTrade in the preceding three months. Any displayed in red failed to send, This could be due to the wrong email address being used.

Custom

These are custom reports commissioned by iTrade users. If you would like to commission a custom report please email support@itrade.net charges apply.

Staff

Here we can set up staff, archive past employees, and set up custom fields for staff members

	Username	Mobile	Admin	Worker	Show Pricing	App Invoicing	Supervisor	Trainee
ID	itradedemo		YES	YES	YES	NO	YES	NO
DE	Demo Worker		NO	YES	YES	YES	NO	NO
WG	Worker #2		NO	YES	NO	NO	NO	NO
BB	Bob		YES	YES	YES	YES	NO	NO
TE	tester		NO	YES	NO	NO	NO	NO
SH	Shayne		YES	YES	YES	NO	YES	NO
MW	Smick	21552222	YES	YES	NO	NO	NO	NO
TO	trainee 1		NO	YES	-	-	-	YES
PH	Pboo		YES	YES	YES	YES	NO	NO
TF	Trainee		YES	YES	NO	YES	NO	NO
TT	Warda		YES	YES	NO	YES	NO	NO
PW	plumbing world		YES	YES	NO	YES	NO	NO
PK	Peter		YES	YES	YES	YES	YES	NO
PO	Polly		YES	NO	-	-	-	-

Current

This is a list of all current staff members.

Username: This is the name that they use to login, This can't be changed once saved.

Mobile: Mobile number

Admin: This will display if the staff member is an admin allowing them to login to the server end.

Worker: This will display if the staff member is a worker allowing them to login to the mobile app.

Show pricing: Determines if the worker will see pricing on the app.

App invoicing: Determines if the worker can finalize the invoice which will send it directly to the customer. Using the Xero Pay now feature you can receive payment while onsite, saving the need for a portable payment system.

Supervisor: A supervisor has more access on the app. Supervisor can see other workers' jobs, revisit, unassigned and unscheduled. Also supervisors can add visits to a job and edit customers.

Trainee: Can only be assigned to other workers on the calendar. They only have access to see the jobs for the worker they are assigned to for that day. They also have access to their timesheet.

To add a staff member click the "Add Staff", you will now need to give them a username and password. Please note the username needs to be unique and can't be changed as all history will be tied to the username.

You can now add personal information for this staff member. You will then need to set what permissions that staff member will have.

To book Annual Leave click “Add Annual leave” add a start date and time and end date and time. You can then choose to exclude certain days as required. When a staff member has annual leave booked it will block them out on the calendar, meaning no visits can be booked. It will also add this to their timesheet. Note that field workers can also request annual leave via the App which sends notifications and needs approval by an Admin.

To archive a staff member click archive

Archived

This is a list of all archived staff.

Custom Fields

These are used to add extra details you may wish to record for your staff eg, shirt size, trade registration, etc.

Timesheets

Here you can see all workers timesheets, and export in CSV format, email to payroll companies, add sick leave, add downtime, reimbursements, add oncall days, add unpaid breaks, add paid breaks, add notes. You can also see how many workers have submitted their timesheets for that period.

Ideally each worker is responsible for their own timesheet, completes, checks and submits them, however it can all be done by an admin if required.

Timesheet

When you click into a pay period you will have all workers summaries displayed. This will show each worker, how many hours in each category set up in the Time section. From here you can Email, export or print.

When you click into a worker you will see a detailed (If “Detailed” is selected in at style) view for the period selected. You can also add jobs, downtime, reimbursements, on-call, unpaid breaks, sick leave, public holidays, notes, and request annual leave.

You can also click on any of the hours, to change them as required.

You can change the style from “Detailed” to “First to Last”. “First to Last” means we will display the time from when the first job was first started to the time the last job of that day was completed (or paused, or revisited or rescheduled)

Options

Select your pay frequency: This will allow you to create timesheets for weekly, fortnightly or monthly periods.

End of current pay period: You can adjust this to ensure your pay period falls on the day you would like, eg Thursdays.

Allow workers to search and add jobs to their timesheet: This option allows your workers to search all jobs and projects and add them on their timesheet even if they haven't attended the site. Without this option enabled, only jobs that are assigned to the worker and have been "Started" via the App are shown on timesheets. Therefore by enabling this option your timesheets change from being "Proven & Accurate with an audit trail" to "Possibly Inaccurate and requiring checking". This option is convenient for company whose workers don't always use the App, however it opens the possibility of "Timesheet exaggerations". We recommend using caution.

Submit all field workers timesheets up until (but excluding) the current period: This will submit workers timesheets up to the current period. This is used to tidy up old unsubmitted timesheets.

Auto-create timesheets for these workers: On the first day of each new pay period we will create a timesheet for the selected workers. Workers not selected here will still have a timesheet created if they start a job on the app.

Export column order: Here you can select individual fields to be included in your timesheet export. You can also reorder the list by dragging the hamburger menu on the side. This will allow you to move it to a new position allowing you to modify the export file to suit any payroll software.

Settings

Here you can find all your company information, tax information, set up accounting software and export any jobs, customers and materials.

The screenshot shows the iTrade web application interface. At the top, the iTrade logo is on the left, and the user is logged in as 'Admin' for 'iTrade Demo Company' on the right. A navigation menu includes CALENDAR, JOBS, ESTIMATING, CUSTOMERS, SUPPLIERS, MATERIALS, MAP, REPORTS, STAFF, TIMESHEETS, SETTINGS, DEV, and MORE. A search bar is also present. The 'Settings' page is active, with sub-tabs for 'Settings', 'Accounting System', and 'Export Data'. The left sidebar contains a menu with 'Company', 'Tax', 'Location', 'Misc', and 'Holidays', and a 'Save' button. The main content area is divided into two sections: 'Company' and 'Tax'. The 'Company' section includes fields for 'Company Full Name' (iTrade Demo Company), 'Postal Address' (123 Fake Street, Fake Town, Fake City), 'Phone Number' (555 1234), 'Email Address' (shayne@itrade.net), and 'Website' (http://www.itrade.net). There is also a 'Logo' section with an 'iTrade' logo and buttons for 'Upload Logo' and 'Delete Logo'. The 'Tax' section includes 'Tax Type' (radio buttons for GST, Sales Tax, VAT), 'Tax Rate' (input field with 15 and a percentage sign), and 'Inventory is' (radio buttons for Tax Exclusive, Tax Inclusive).

Settings

Company

This is the information we will display on any PDF we create out of the system. This will appear on forms, quotes and reports. The email address you have here will also be your default reply address for emails sent out of iTrade.

Upload logo

Here you upload your company logo to appear on forms, quotes and reports.

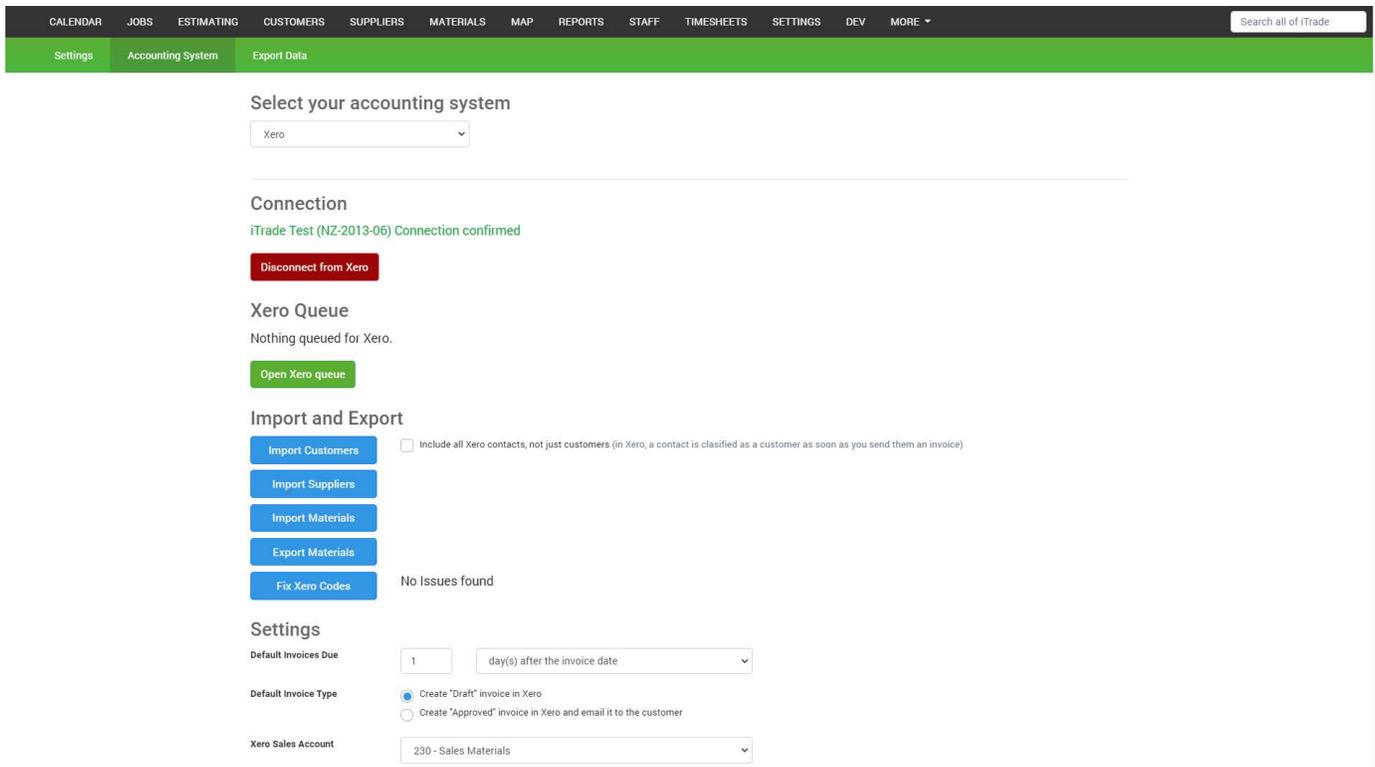
Tax

Here you set your Tax type, Tax rate and whether your inventory is tax exclusive or tax inclusive. Please note: We do not recommend setting your inventory to tax inclusive as this reduces the option of how tax can be displayed on your quotes

Location

Set your country, select your timezone for your calendar, Select your currency and select your paper size for documents you want to print from iTrade

Accounting System



None: This means you aren't using iTrade for invoicing purposes

CSV: This means you can export invoices in CSV format to import into other accounting systems.

Invoicing by iTrade: This means iTrade will create your invoices. Invoice can be found in the "customer's account" then "Invoices" tab. Here you can mark as paid, part paid, or unpaid. You can also add notes to invoices.

XERO OAuth 2.0: This is where you link iTrade directly to your xero account. From here you can check the Xero Queue, this is where you can see any issues that have occurred, any errors will contain an error message. Error messages are in red and at the top of the list. You can import your customers and contacts from Xero, Import suppliers, Import materials and export materials. You can also set your invoices due date, invoice type (draft or approved), Xero sales account and Xero purchase account and can update your list of accounts to match Xero.

Note:

Information updated in iTrade will automatically update. However anything updated in Xero must be manually pulled into iTrade from this page.

Default invoice due dates can also be set per customer in the customers account.

Default invoice type (draft or Approved) can also be set in the "Jobs" then "Options" section and can be changed on each invoice before being sent.

Xero sales and Purchase accounts can be set on a per item basis in the materials module by selecting any item and changing the fields.

Export Data

Here you can export your customers, jobs and materials in CSV format.

More

Messages

Here is a list of all SMS messages sent from your iTrade account. You can also send SMS messages from here.

Help

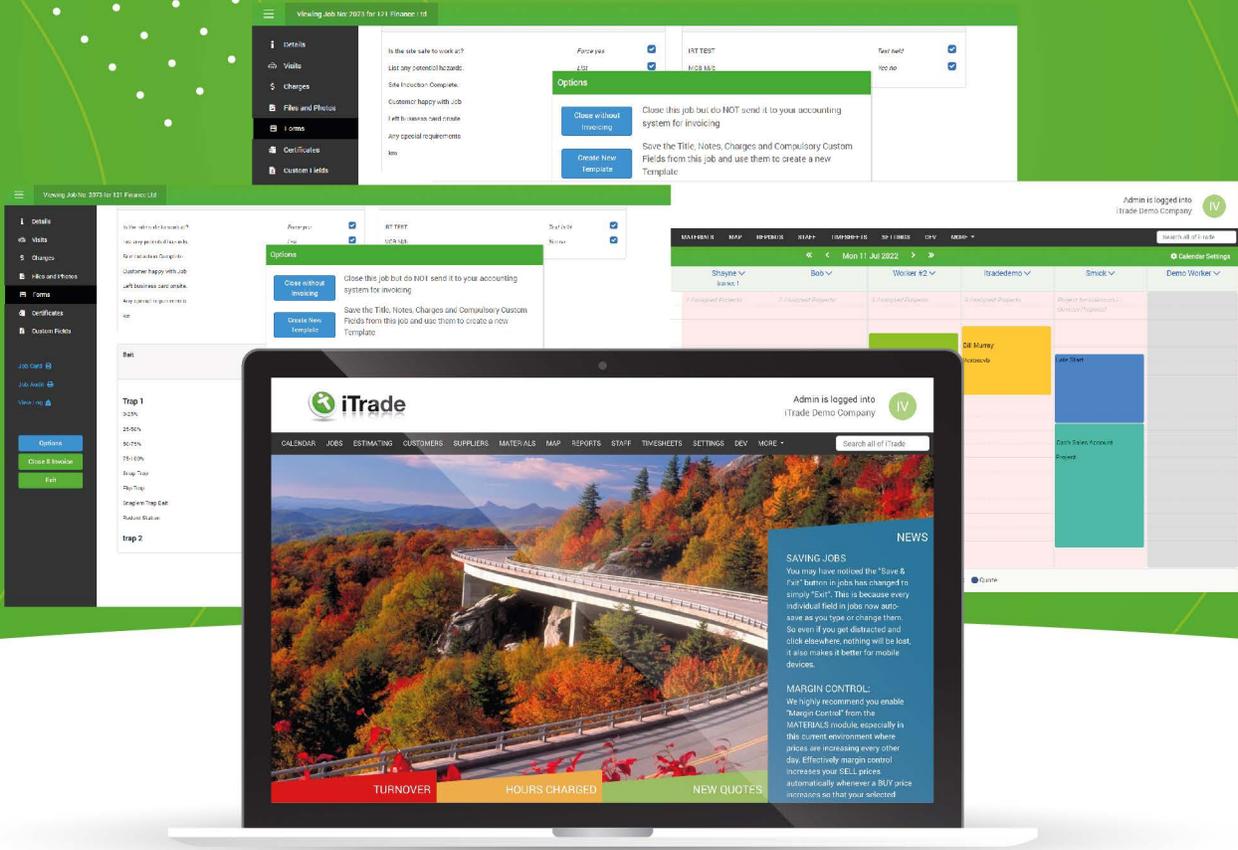
This is where you can find our training videos, user guide, setup Wizard and make a support request.

Certificates

Here you can view and search all certificates produced by all staff.

Logout

To log out select your initial at the top right corner of the screen then selecting “Log Out”



iTrade

Software for the Trades

 www.itrade.net