The job management system tough enough for the trade
A better way to run your business

SmartTrade was conceived in 1998 when Sam MacGeorge, the owner of a building services and project management company, got sick of the volume of paperwork he had to deal with and the fact that his accounting system didn’t manage jobs well. When Sam couldn’t find an affordable job management system, he saw an opportunity to develop a software application to streamline the front-end operations of service companies i.e. managing jobs, customers, suppliers and employees.

SmartTrade is revolutionising the way that service companies, small and large, run their businesses, with practical and affordable solutions for the office and the field.

Our office solution, SmartTrade Server® is a comprehensive job management system, with links to a number of leading accounting programs, sharing data such as customers and invoices and reducing double entry and errors.

Our field solution, SmartTrade Mobile® allows field tradesmen equipped with handheld (Pocket PC) computers to receive and process jobs, and to communicate wirelessly with the office. SmartTrade Mobile® significantly reduces paper work and improves productivity – it keeps your tradesmen in the field and out of the office.

Our products are “off-the-shelf” packages, but allow users to tailor certain features. SmartTrade can be implemented in days or weeks rather than months, and avoids the risks and delays that are common with implementing customised applications.

To ensure that SmartTrade delivers the anticipated benefits, we don’t just sell software, we also ensure that our customers have the right equipment, training and support. We achieve this through a network of technical and training partners covering most of Australia and New Zealand.

View your job in progress
Why service companies are choosing SmartTrade

1. SmartTrade significantly improves job management, with benefits such as:
   • Reducing paperwork, administration, and duplication of data entry
   • Streamlining costing, quoting and estimating, using up-to-date supplier price files.
   • Improving scheduling and tracking of jobs and labour.
   • Improving control of labour, materials, profit margins and variations.
   • Reducing the time spent by tradesmen on non-chargeable activities.
   • Storing key information in a central database, which can be shared over a network.
   • Reducing the cost of printing invoice and order books.

2. SmartTrade offers an affordable, quickly implemented and low risk solution compared to alternatives such as customised applications.

3. SmartTrade can be configured for service companies from one-man operations to large businesses, and is scalable as a business grows.

4. Our network of local partners provides outstanding support and training.

“We have recently had SmartTrade installed and our only regret is that we didn’t do it sooner. It is proving to be an invaluable tool for the day to day running of our company.”

Debbie Williams, Director A.J. Plumbing & Roofing Ltd, Auckland

“Teamed with an accounting package, SmartTrade provides a complete and economical system. This is definitely the tool that trades-people need to drive their companies towards the future.”

Geoff Isherwood, ComputerLink, Accredited accounting software trainer, Melbourne.

“We have recently had SmartTrade installed and our only regret is that we didn’t do it sooner. It is proving to be an invaluable tool for the day to day running of our company.”

Debbie Williams, Director A.J. Plumbing & Roofing Ltd, Auckland

“SmartTrade is simply the best system that I have ever used and I’ve been in the trade for 30 years!”

Mike Heappey, Service Manager, Electrical Response, Auckland
Search and manage jobs. Set to recur or create new jobs quickly from templates.

Scheduler, to plan jobs and manage staff.
Web Work Orders allows customers to log jobs directly over the internet.

Dispatch and return paperwork wirelessly to field staff. no more paperwork or double entry.
## SmartTrade Functionality

| Client database | • Add new clients easily, including multiple sites, contact names, default pricing and payment terms, and notes.  
| | • Import client details from an interfaced accounting program.  
| | • Search for clients by name, contacts, addresses and phone numbers.  
| Job logging | • Create a new job, from scratch or from a template or by duplicating an existing job.  
| | • Select job type (quote, estimate or charge-up) and set a status.  
| | • Allocate responsibility for the job, assign one or more field staff to the job.  
| | • Set job priority level and due date and time.  
| Recurring jobs | • Set jobs to recur at set intervals (e.g. monthly) for a specified period or number of occurrences.  
| Web interface | • Allow selected clients to log jobs into SmartTrade Server® via the internet 24/7.  
| Scheduler | • View calendars for one or more employees.  
| | • Reschedule jobs by dragging and dropping in the scheduler.  
| Dispatch | • Print job sheets for field staff  
| | • Send jobs electronically to field staff equipped with Pocket PC devices.  
| SMS | • Send text messages to field staff equipped with cellphones.  
| Job Management | • Search for jobs by client, status, due date, employee etc.  
| | • View (but not edit) jobs that have been dispatched to Pocket PC devices.  
| | • Record job notes, and selectively include in invoices.  
| | • Automatically record the job history including date and time of key events.  
| | • Attach electronic files to jobs (e.g. drawings, correspondence).  
| | • Archive completed jobs  
| Reports | • Run reports designed from a job management perspective.  
| | • Export data from grids to a spreadsheet.  
| ST Alerts | • Advise when jobs become overdue, are returned from a Pocket PC, are logged by a client via web services or are automatically created from a recurring job.  
| Costing | • Create quotes and estimates quickly using up-to-date supplier price lists.  
| | • Select items direct from supplier price lists or from MyData, or create new items.  
| | • Speed up costing by creating templates or duplicating existing jobs.  
| Job sheet | • Record actual time and materials and monitor gross profit.  
| | • Create purchase orders and invoices direct from the job sheet, and print or email.  
| Variations | • Monitor variations on quoted jobs.  
| Order numbers | • Issue purchase order numbers to field staff  
| Timesheets | • Enter data from timesheets or automatically from SmartTrade Mobile®  
| | • Run timesheet reports by period and activity.  
| | • View hours in the Time tab for a job.  
| MyData | • Group frequently used items into user defined categories  
| | • Enter custom items (e.g. labour rates, call-out fees)  
| | • Create kit-sets (assemblies), including items from different suppliers.  
| Supplier database | • Add new suppliers easily, including multiple branches, contact names, and notes.  
| | • Search for suppliers and orders.  
| Price books | • Download price books from various suppliers and import into SmartTrade Server®.  
| Supplier invoices | • Download from suppliers’ websites (where available) or key in.  
| | • Compare suppliers’ invoices to orders created in SmartTrade Server®.  
| | • Electronically copy line items from suppliers’ invoices into job sheets.  
| Employee database | • Add new employees, including phone numbers and notes.  
| | • Allocate user names and passwords, and assign administration rights if applicable.  
| Accounting interfaces | • Export data to and import data from a number of popular accounting programs using the SmartTrade Data Exchange Wizard.  

---

1 Optional and requires a separate licence
2 Requires an account with Redcoal
SmartTrade Mobile® Functionality

**Send and Receive jobs**
- Receive jobs, either wirelessly or by cradling the Pocket PC™ when in the office or from home over the internet.
- Accept job, or decline or reassign to another employee.

**Log jobs**
- Create a new job in the field (charge-up, quote or estimate)

**Costing**
- Create quotes and estimates quickly while on site.
- Select items from MyData (buy prices can be hidden) or enter custom items
- Print to a portable printer.

**Job sheet**
- Record actual materials while on site, not when back in the office.
- Select items from MyData (buy prices can be hidden) or enter custom items.
- Create purchase orders and invoices direct from the job sheet. Print or email, or return to the office.

**Job history**
- View a list of jobs that have been returned (history period specified by the user).

**Timesheets**
- Enter time as you do the job.

**Synchronise jobs and timesheets**
- Update the view only copy of the job held on SmartTrade Server®.
- After completing a job, return it electronically to the office.
- Send timesheet data back to SmartTrade Server®.

**Signature capture**
- Have the client sign on the screen of the Pocket PC™ to accept a quote, estimate or invoice.

**Data network**
- Choose your data network provider, either GPRS or CDMA.

---

**Technical Specifications – SmartTrade Server®**

**Configurations**
- SmartTrade Server® can run either on a single PC or in various multi-user networked configurations:
  - Client PCs without a dedicated server (peer to peer network)
  - Client PCs networked to a dedicated server (VPN access is optional)
  - Shared network (files reside on a shared network drive)
  - Terminal services (thin client), sharing a single database
  - Terminal services with multiple databases (hosting)

**Code**
- Microsoft .NET Framework 1.1

**Server operating system**
- Pentium 4, 512Mb Ram, 300Mb hard drive space, 100Base-T network card
- Windows 2000 Server, Small Business Server 2003 Premium or later

**Database**
- SQL (either MSDE Service Pack 3a or SQL Server 2000 Service Pack 3a)

**Client PC (minimum)**
- Pentium 4, 256Mb Ram, 100Mb hard drive space, 100Base-T network card

**PC operating system**
- Windows 2000 or later (preferably Windows XP Professional)

**Mobile Connectivity**
- SQLCE, Internet Information Server v5 or above

**Internet connection**
- Broadband connection, fixed IP address

**Web interface**
- Internet Information Server (IIS) v5 or above

**Laptop VPN**
- VPN software and a fixed IP address

**Backup**
- Via SQL Server

---

**Technical Specifications – SmartTrade Mobile®**

**Code**
- Microsoft .NET Compact Framework 1.0

**Mobile device**
- Pocket PC 2003 (Intel X-Scale CPU, 30Mb available program, 10Mb available storage memory)

**Database**
- SQL Server CE

**Operating system**
- Pocket PC 2003

**Wireless data transfer**
- GPRS or CDMA
Supported Accounting Packages (as at 1 October 2004)

<table>
<thead>
<tr>
<th>Package</th>
<th>Supported Versions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accredo</td>
<td>Mercury 1.0.2.29, Saturn 2.0.2.3.302</td>
</tr>
<tr>
<td>Cashbook Complete</td>
<td>v.4.10</td>
</tr>
<tr>
<td>emPower</td>
<td>v.5.0.7</td>
</tr>
<tr>
<td>Honeyworks Gold</td>
<td>v.4.09</td>
</tr>
<tr>
<td>MYOB Australia</td>
<td>Premier 8, Premier 7, Accounting 13 and 14, Accounting Plus 14</td>
</tr>
<tr>
<td>MYOB NZ</td>
<td>Premier 6TE, Premier 8 (2004), Accounting 12, and 14, Accounting Plus 14, Aurora One</td>
</tr>
<tr>
<td>Prophet</td>
<td>IV (DOS) and 2.21.03 (Windows)</td>
</tr>
<tr>
<td>Quantum</td>
<td>V5 expected November 2004</td>
</tr>
<tr>
<td>Sage</td>
<td>Line 50 v.10</td>
</tr>
</tbody>
</table>

About SmartTrade Ltd

SmartTrade Ltd is a privately owned company operating in Australia and New Zealand. Our goal is to offer world-class products that simplify life for our customers.

About our partner network

SmartTrade Ltd has a network of local partners covering most of Australia and New Zealand. Our partners include resellers, and technical and training partners to ensure that our customers have the right equipment, training and support.

In addition, SmartTrade Ltd has entered into arrangements with various suppliers to make price lists and invoices available for download on their websites, and to promote SmartTrade's products to their customers.

Reseller Contact Details:

If you are calling from New Zealand 0800 EASYHELP 0800 327943
If you are calling from Australia 1800 350495
www.smarttrade.biz  info@smarttrade.biz

ABN 70 879 973 518