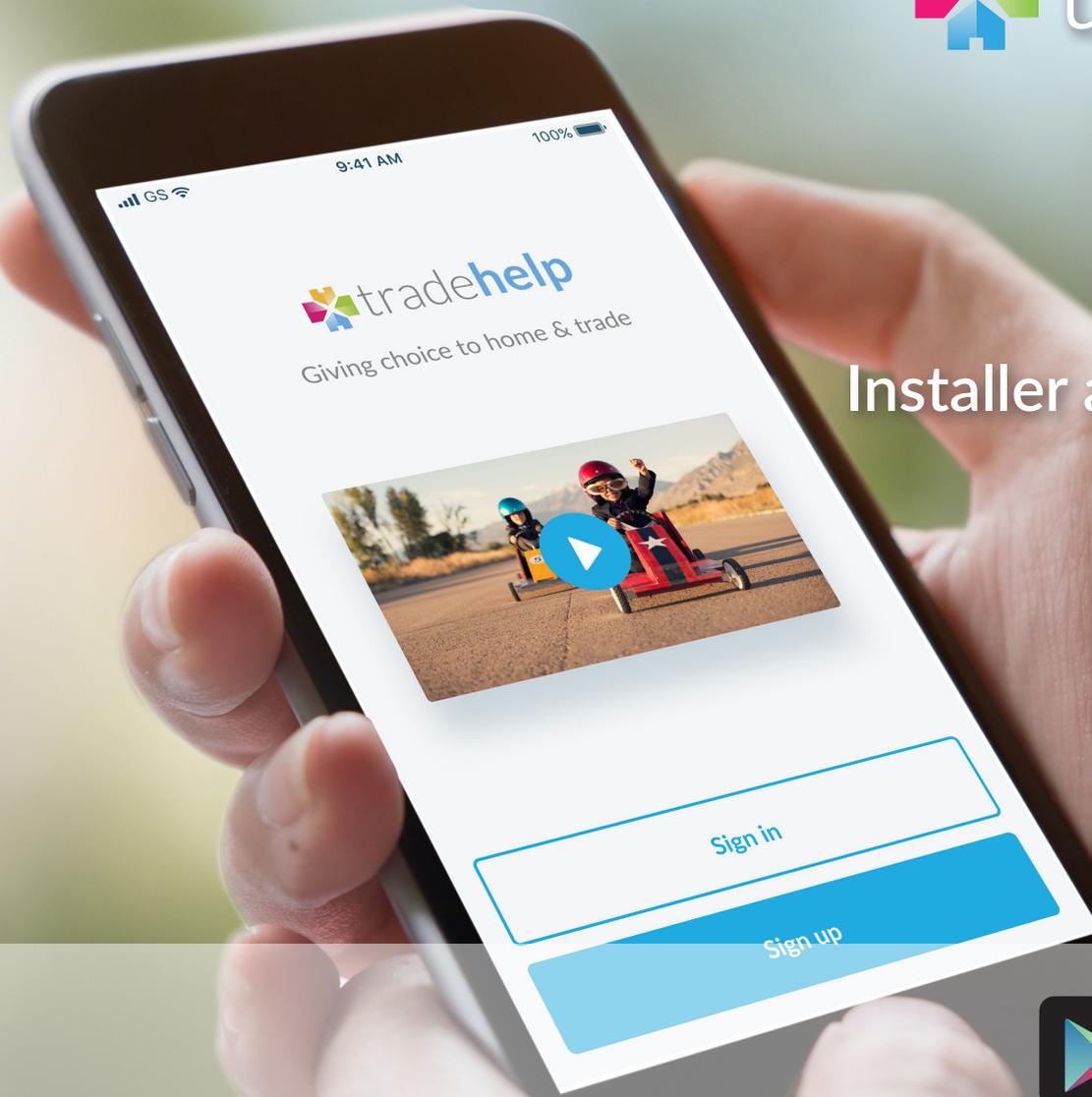


tradehelp app

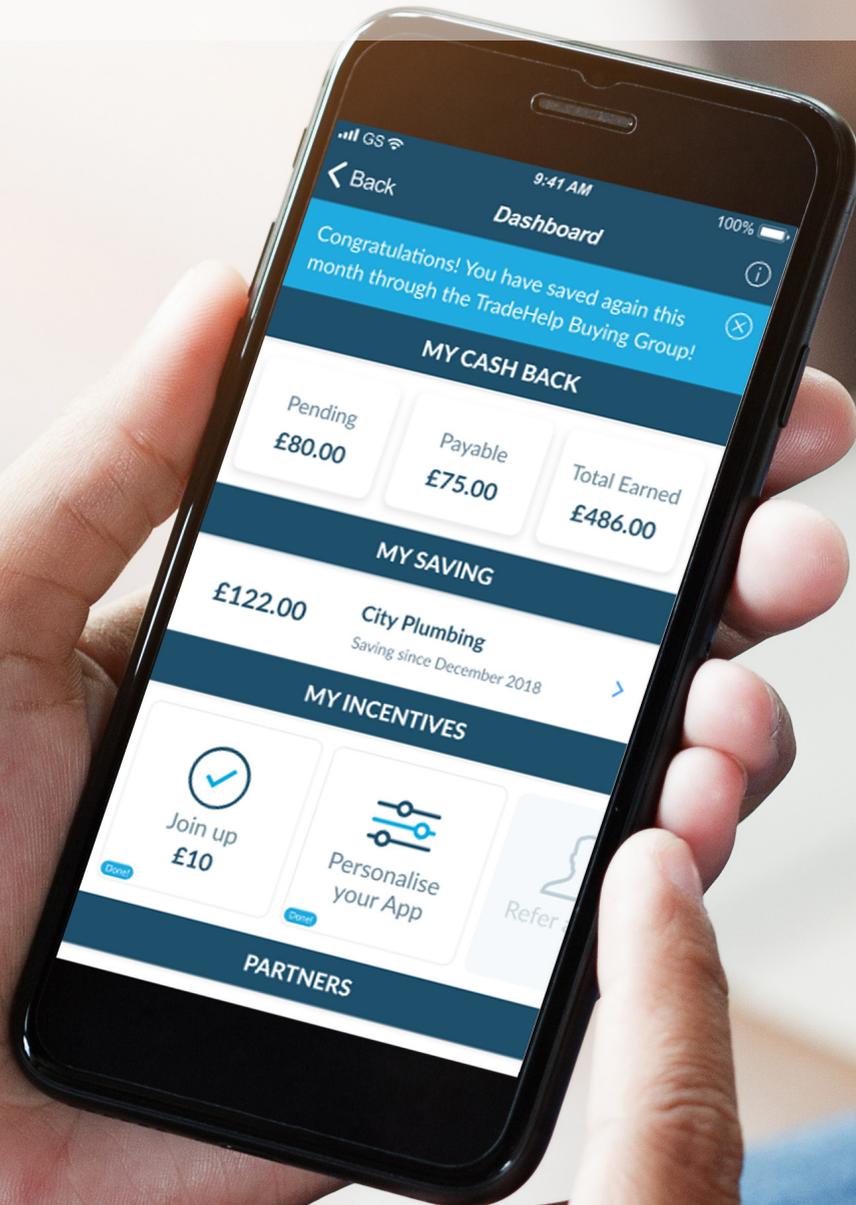


Installer app **FREE** to download and use

- Quick quote and invoice tool
- Bathroom planner software
- Installer toolbox
- Buying Group Network
- Finance for your customers



'Negotiating cash back and special offers from leading merchants and manufacturers on your behalf.'



TradeHelp Buying Group

Combining the buying power of our installer network with industry know-how, we have negotiated lower prices from a number of heating and bathroom manufacturers and merchants. Products can be purchased on your own account from any Merchant.

Our members can access lower prices and special offers on:

- Boilers
- Radiators
- Chemicals
- Filters
- Controls
- Thermostats
- TRV's
- Pumps
- Copper Tube
- Sanitaryware



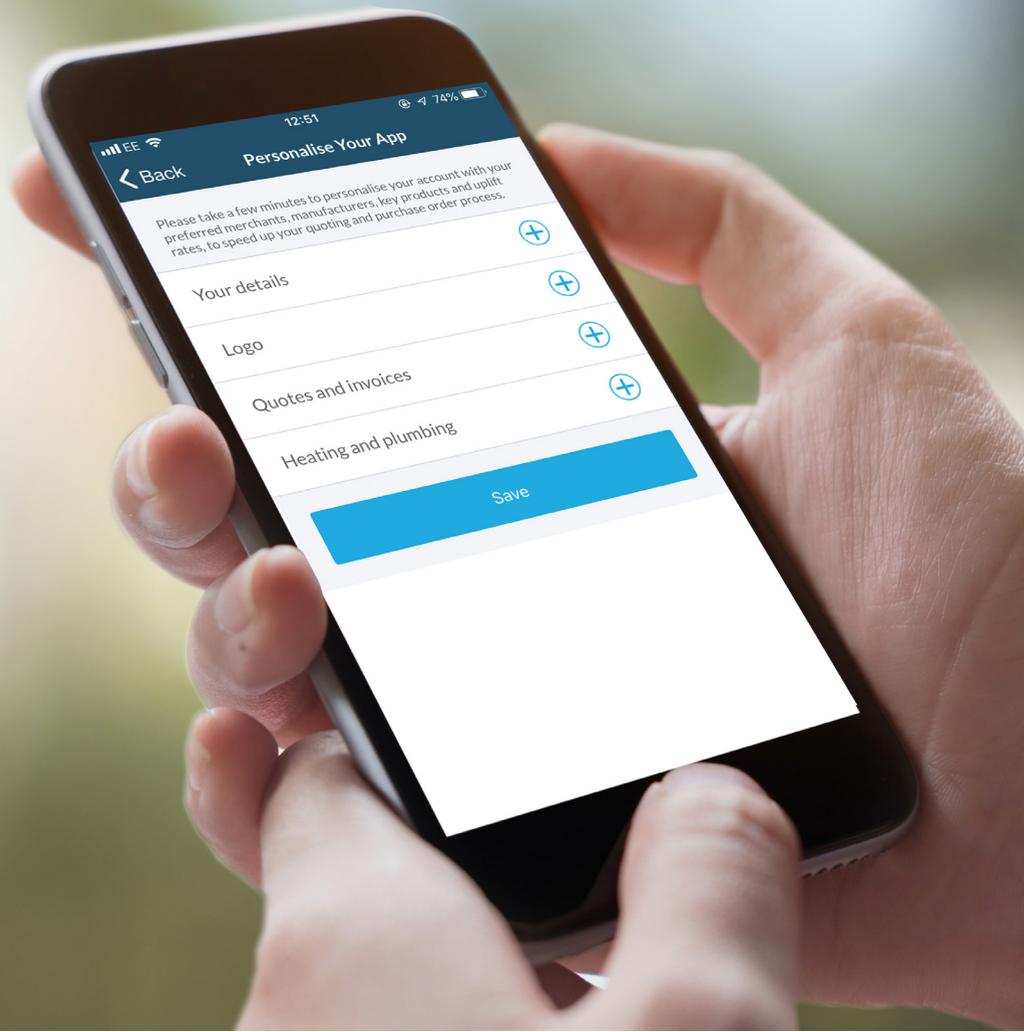
App Guide

The TradeHelp Buying Group is joined through the app.

Once downloaded, create an account and follow the instructions to register. A member of our team will be in touch to discuss all of the Buying Goup benefits.

Start saving from the day you join.

‘Complete your set-up and preferences to get the best from your app and personalise your quotes and invoices.’



App Set Up

Setting up your app saves you time. Favourite products will appear at the top of your selections and your details will populate onto quotes and invoices. You can personalise:

- Company details
- Contact information
- Your logo
- Your profile picture
- VAT status
- Bank payment details
- Website address
- Favourite manufacturers
- Preferred merchants
- Labour rates



App Guide

App Setup can be found within Settings on the main menu.

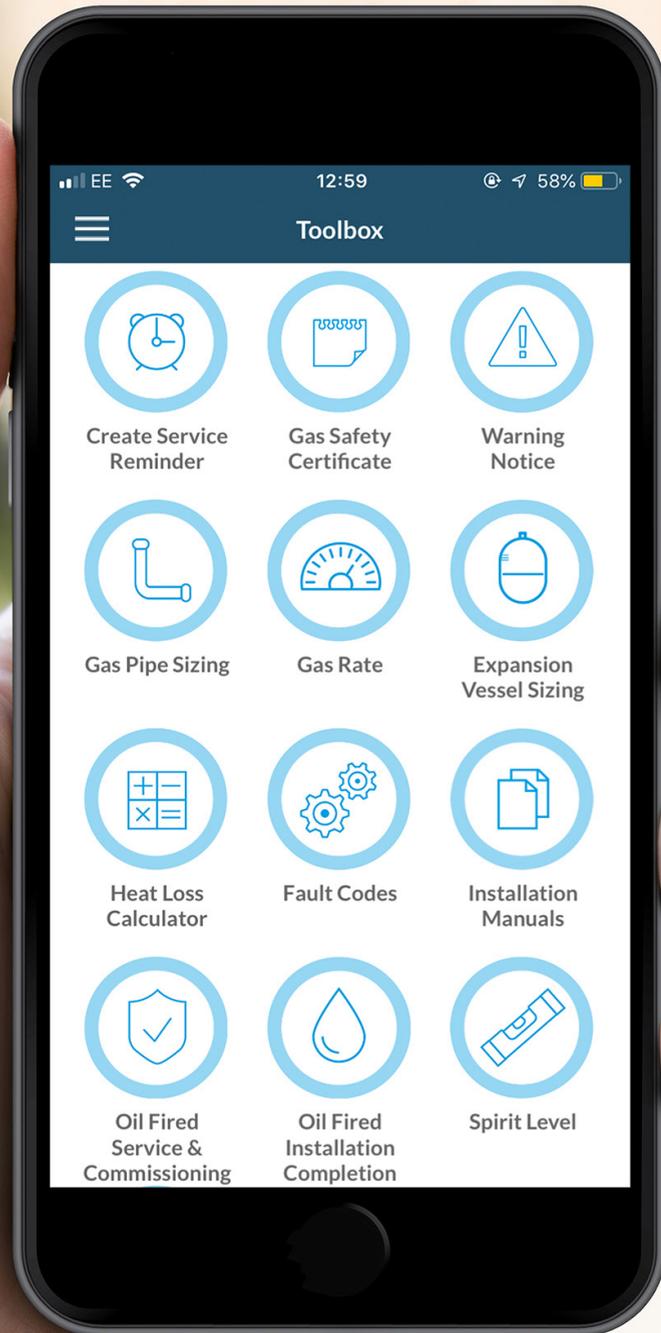
Complete all sections to get the best out of your app.

A logo can be uploaded from your camera roll. Use a high resolution image for the best result.

Useful Tools

The app provides handy toolbox and installation sections, to help save you time and money. From the main menu you can also access the training centre directory. Using the tools you can:

- Complete Gas Safety Certificates
- Create Service Reminders for customers and yourself
- Produce Oil Fired Installation Completion and Service and Commissioning Reports
- Create cooling off period Waiver Forms
- Find fault codes and installation manuals from all the leading boiler manufacturers
- Create Warning Notices
- Benefit from a number of time saving industry calculators
- Register your boiler via TradeHelp



App Guide

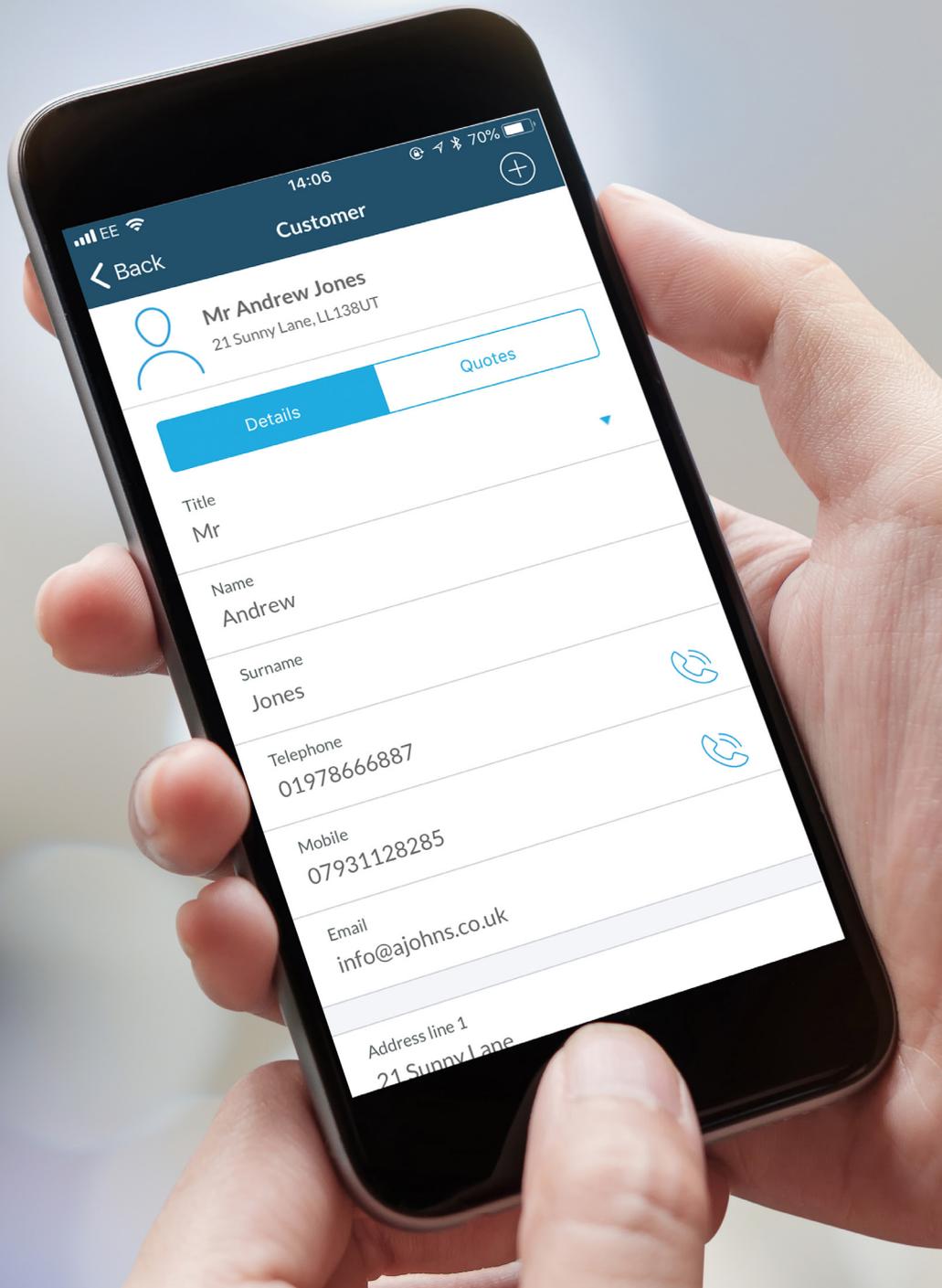
The Toolbox and Installation pages can be accessed direct from the main menu.

Use the Document Upload option to send in your product invoices for cashback claims.

Managing Customers

Manage your customers' details, appointments, quotes, invoices and service reminders all from one page within the app.

- Create a new customer, saving their contact details to populate into the quote
- Call a customer direct from the app
- Save a new appointment for a quote, repair, service or installation
- Create appointment reminders for both you and the customer
- Begin a new quote for a bathroom or heating installation
- Begin a new invoice
- Search for quotes already saved against the customer
- Create service reminders for both yourself and the customer



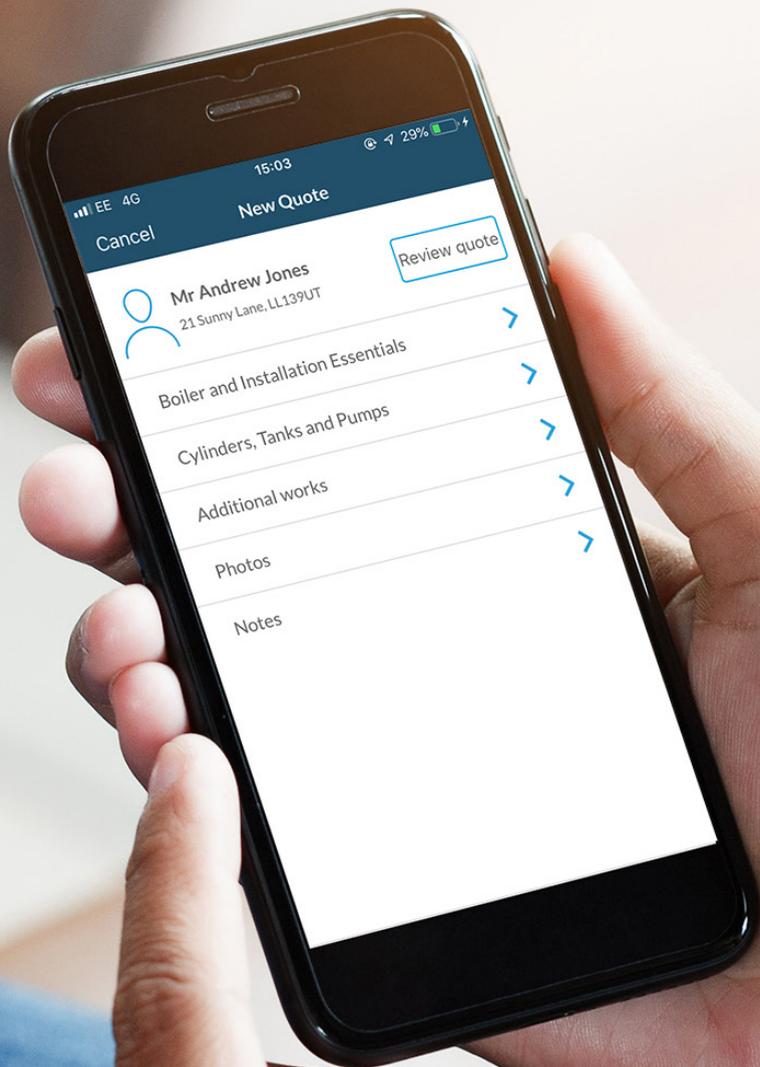
App Guide

Create a new customer by selecting Customers from the main menu and choosing the + sign in the top right hand corner.

Once their details are saved you can then create an appointment, service reminder or start a new quote or invoice.

All customer information is confidential to you and will not be shared.

‘Professional, personalised heating quotes at the touch of a button, with multiple payment options and terms and conditions.’



Heating Quotations

Create and email professional quotes whilst on the go. Simply choose one of the quote forms below and follow the workflow:

- **Quick Quote**
The simplest quote form for Gas or Oil installations. Manually add key items and labour, then include any additional works if required.
- **Service and Repair**
Create quick service or repair quotes by adding simple line items. Please note this form cannot be used for finance quotes.
- **Comprehensive Replacement or New Heating**
An intuitive quote form that automatically adds labour, parts and fittings. Creates an in-depth breakdown for the customer and a ready made bill of materials to send direct to your merchant of choice.

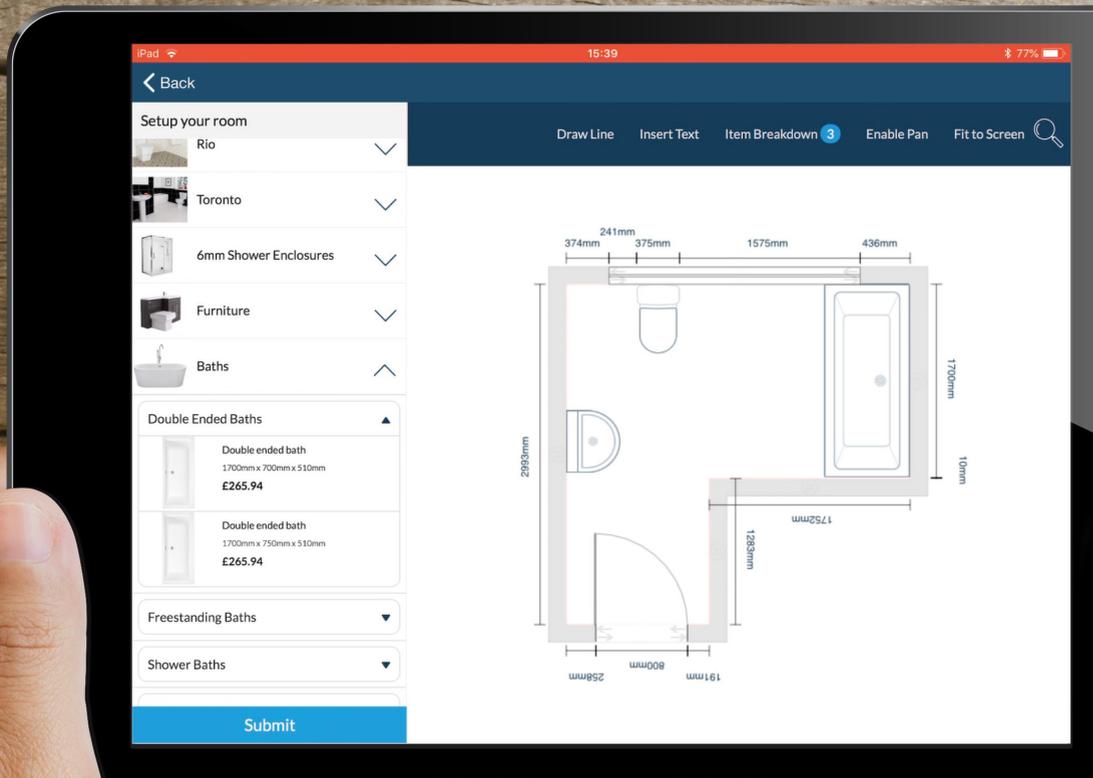


App Guide

To speed up the quoting process a favourite quote can be saved for future use.

To do this you must first complete one of the forms above, then select 'Favourite Quote' from the quote actions list on completion. Please note service and repair quotes cannot be saved as favourite templates.

'Detailed bathroom plans created direct from your tablet in the customer's home.'



Bathroom Quotations

Use the quick quote bathroom tool to design a bathroom plan and build a professional quote for your customer:

- Select a customer and choose Quote With Room Planner
- Follow the menu to personalise the room and add obstructions, windows and doors with the drag and drop technology
- Choose the desired products, along with essential and linked items, and position on the plan
- Review the Item Breakdown to see a full list of your choices, and submit the plan
- Follow the prompts to add installation costs or additional works including joinery or tiling
- Review the quote total and set a deposit if required



App Guide

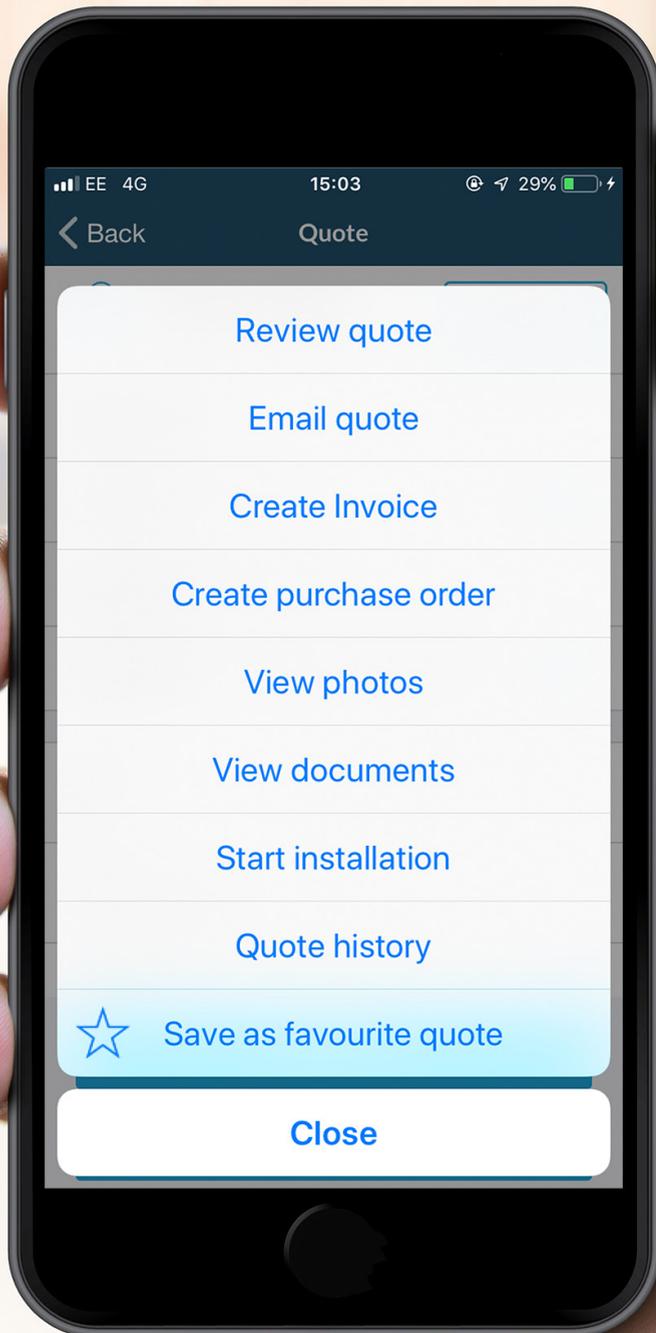
A bathroom plan can only be compiled on an iPad or tablet.

For any other device, or if a plan is not required, simply select Quote Without Room Planner and you will be provided with a list of suppliers and ranges from which to make your selection.

Quote Actions

Once you are happy with your quote, the Quote Actions button provides easy access to the next steps:

- Review your quote to make any amendments
- Email your quote direct to the customer including full terms and conditions
- Create an invoice and email to the customer
- Create a purchase order to send direct to your merchant
- View any photos or documents saved against the job
- Start the installation and access the install tools
- View the full quote history
- Save the quote as a favourite quote to use in the future



App Guide

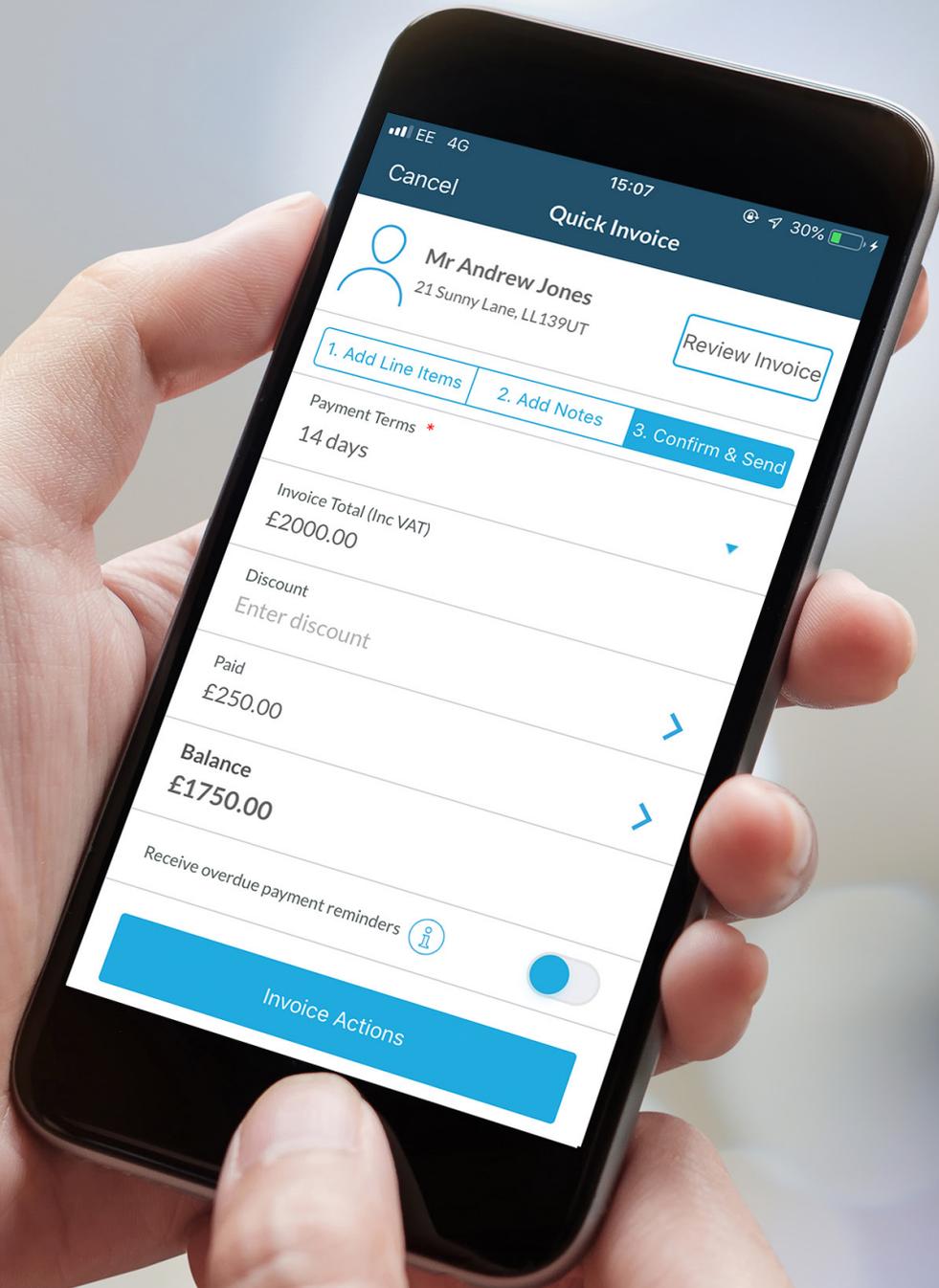
You can return to the Quote Actions list at any time to edit or re-send a quote, create an invoice or start an installation.

To return to your quote, simply choose Review Quotes from the main menu, select the required quote and then choose Quote Actions.

Quick Invoicing

Create and email professional invoices for jobs of any size using the Quick Invoice tool.

- Select Invoices from the main menu and choose your customer or create a new customer using the + button
- Add line items including quantity, price and VAT %. Itemised prices can be hidden from the invoice if preferred
- Any notes entered will be shown on the invoice and bank details will populate from the app settings
- Payment terms can be chosen from Due Now to 28 days and discounts can be added as a percentage or fixed value
- Email the invoice to the customer by selecting Invoice Actions
- An optional payment reminder email will be sent to you once the payment is overdue



App Guide

Invoices can also be created directly from a quote by selecting 'Create Invoice' from your quote actions. This will automatically populate the total cost of the works into your invoice and link the customer details.

Return to the invoice at any time to record a payment and view the outstanding balance.

tradehelp app



Join the thousands of installers already saving
time and money

Download for FREE today

