tradehelp app

Installer app FREE to download and use

Quick quote tool

Bathroom planner software

Installer toolbox

Buying Group Network

Access to multiple payment options

ANDROID APP ON Google play

Download on the App Store

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

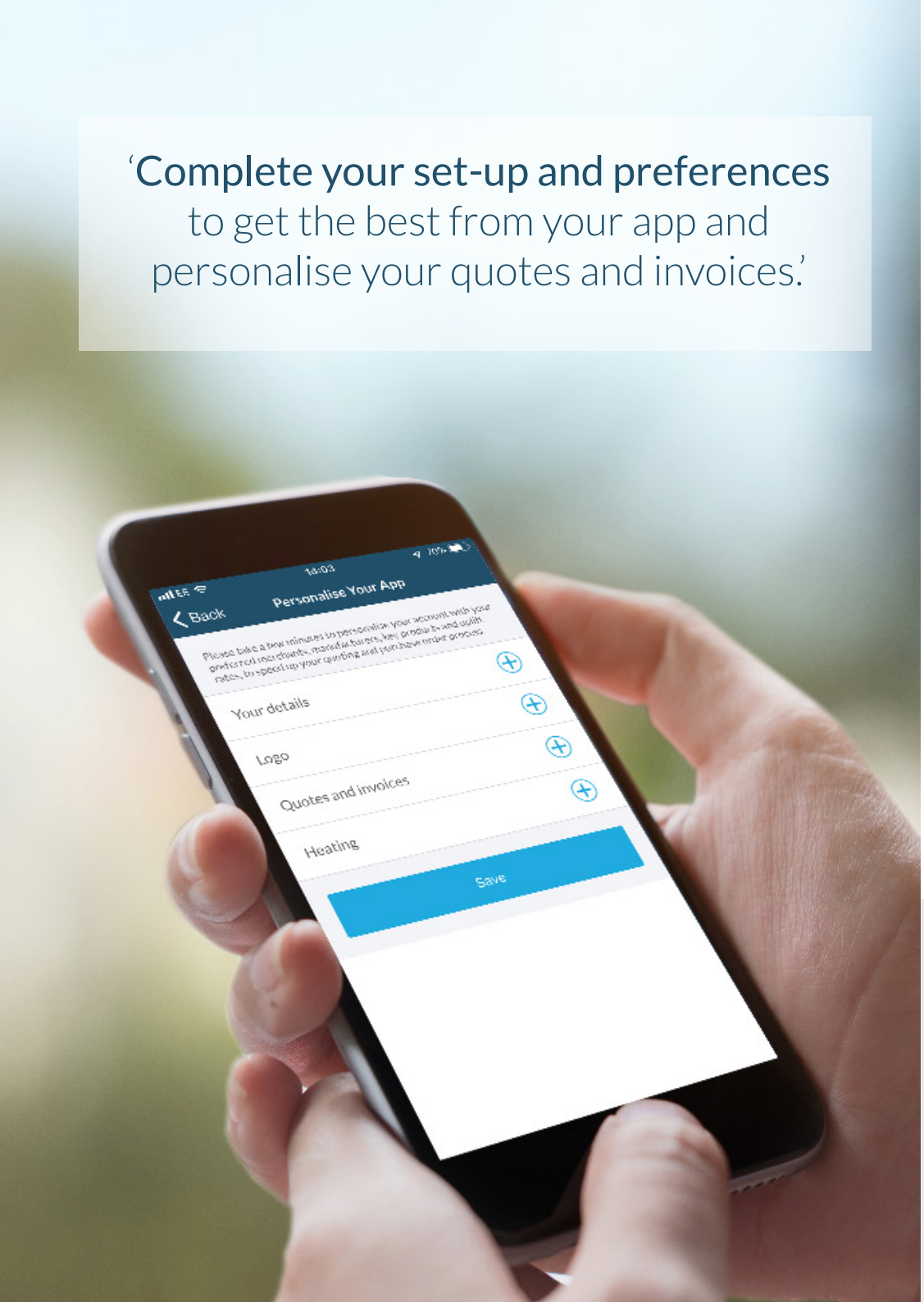
App Guide

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:

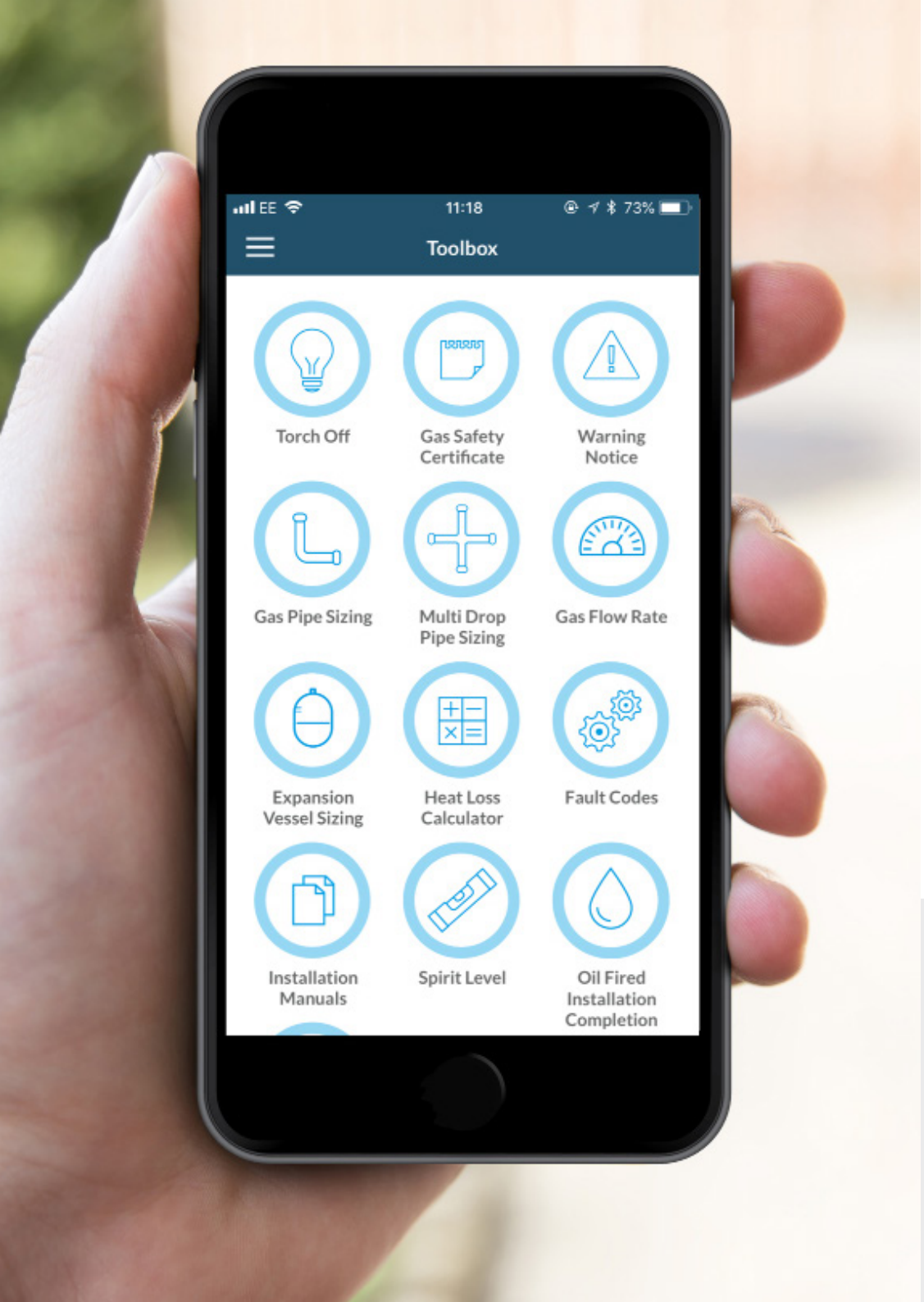
- Company details
- Contact information
- Your logo
- Your profile picture
- VAT status
- Bank payment details
- Website address
- Favourite manufacturers
- Preferred merchants
- Labour rates

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

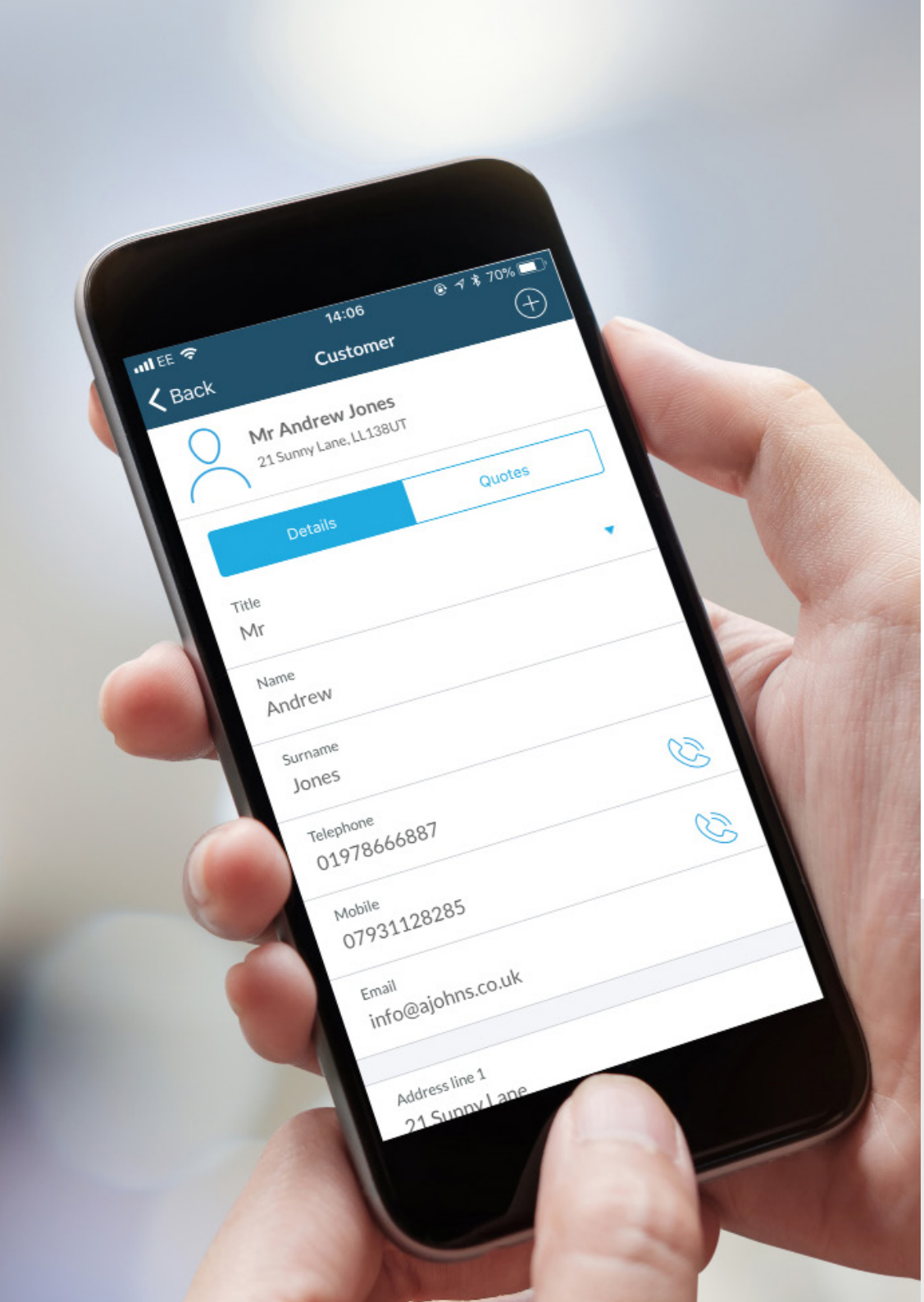
The app provides handy toolbox and installation sections, to help save you time and money. From the main menu you can also access the training centre directory. Using the tools you can:

- Complete Gas Safety Certificates, system change and waiver forms
- Produce Oil Fired Installation Completion and Service and Commissioning reports
- Create customer satisfaction notes
- Register your boiler via TradeHelp
- Find fault codes and installation manuals from all the leading boiler manufacturers
- Create warning notices
- Benefit from a number of time saving industry calculators

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 and quotes 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 or installation
- Create appointment reminders for both you and the customer
- Begin a new quote for a bathroom or heating installation
- Search for quotes already saved against the customer

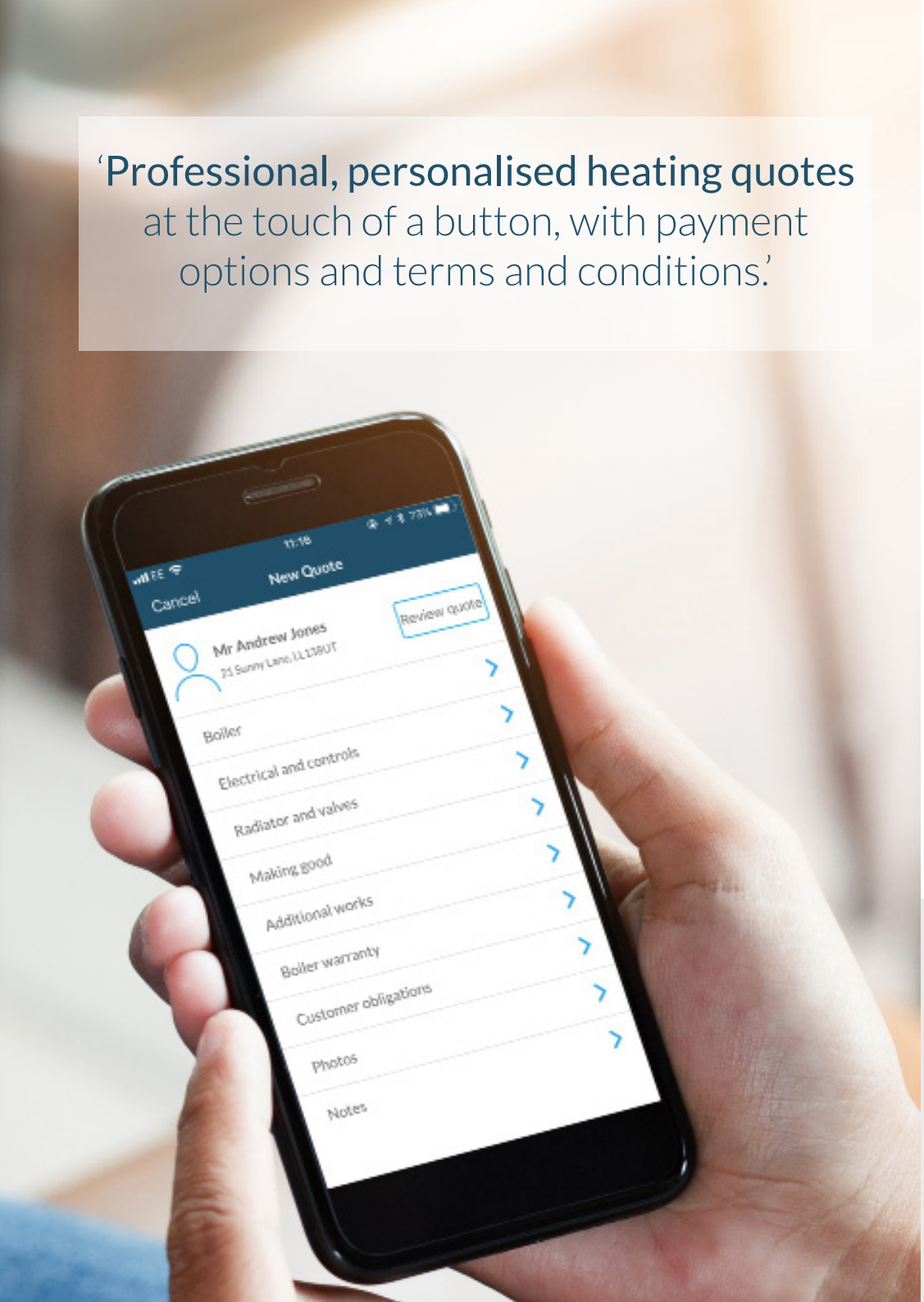
App Guide

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 or start a new quote.

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

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



Heating Quotations

Create a quote for a new heating system or boiler replacement in minutes with the app’s quick quote tool. Simply follow the workflow to:

- Choose the type of quote you wish to create
- Answer the relevant questions to build the detail of your quote
- Select the products you wish to install, including controls, radiators and accessories
- Add any additional works, boiler warranty or customer obligations
- Confirm or edit the full materials list once compiled
- Confirm or edit the suggested labour and quote totals using the blue arrows and add a deposit if relevant

App Guide

The quick quote tool is intuitive and will automatically update your quote with sundry materials and labour as a result of the answers you select to the quote questions.

These can all be reviewed and edited once you have completed the questions before sending to the customer.

Bathroom Quotations

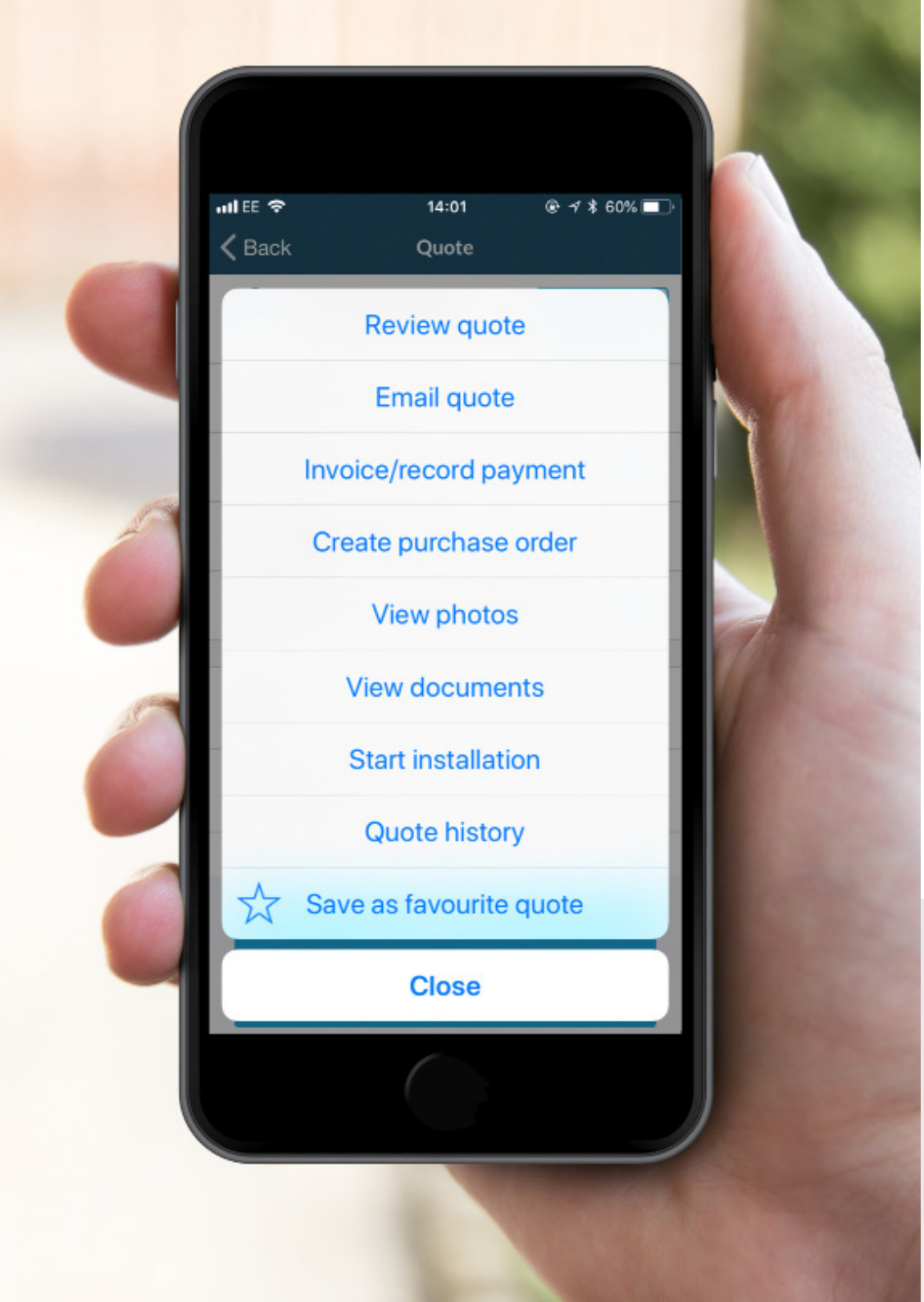
Use the quick quote bathroom tool to design a bathroom plan and build a professional quote for your customer:

- 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
- Create an invoice and email to the customer
- Log any payments received against the quote
- 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, log a payment 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.

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★★★★★

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