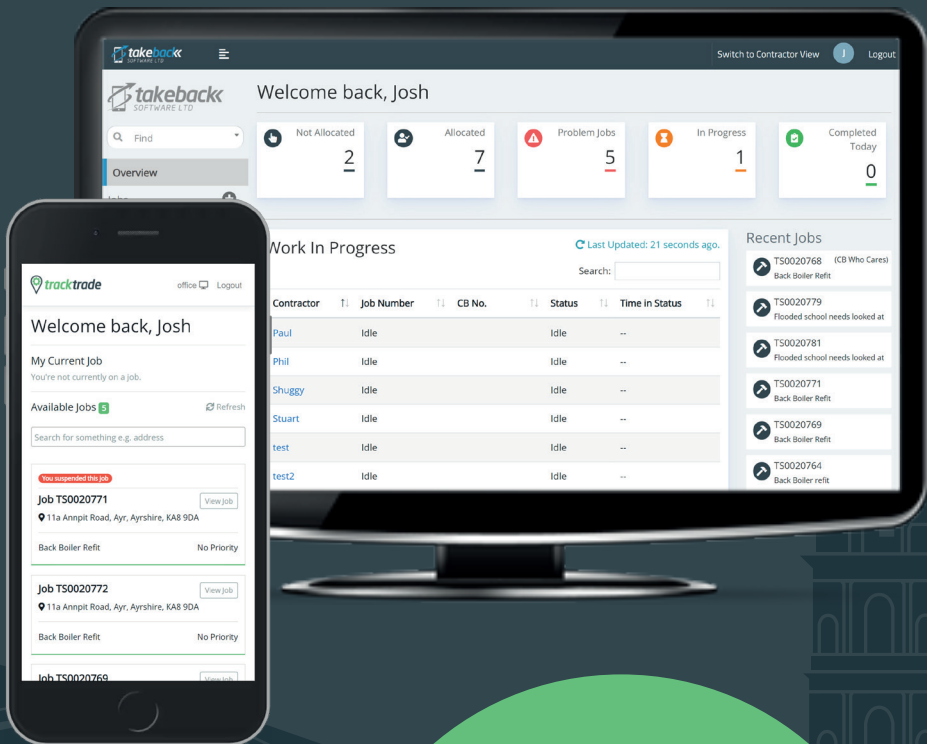# *tracktrade*

FIELD SERVICE APP

What is TrackTrade?

TrackTrade is a cloud-based job management software system designed to streamline and track all processes from the quote, through to invoicing.

Using smart phones or tablets, your field staff and contractors can immediately share job information with office staff; saving time, eliminating paperwork and minimising costly mistakes. You'll always know where your staff are, what they are working on, and when they finish.

Your Office Dashboard and Contractor app

Why choose TrackTrade?

✓ **Paperwork binned. Save time and cut costly mistakes.**

✓ **Real-time information from your field staff, instantly available on your dashboard.**

✓ **Works on any device. Use your existing smartphones or we'll set you up with new ones.**

✓ **Get good data, easily. Photos, notes, and audit trails on each job.**

✓ **Simple to use. Forget cluttered menus, features you won't use and weeks of training.**

✓ **Make it your own. Build your own library of quote templates and workflows.**

✓ **Share job links by text or What's App so even sub-contractors can view jobs.**

✓ **Flexible. Use as little or as much as you like to slot into your existing process.**
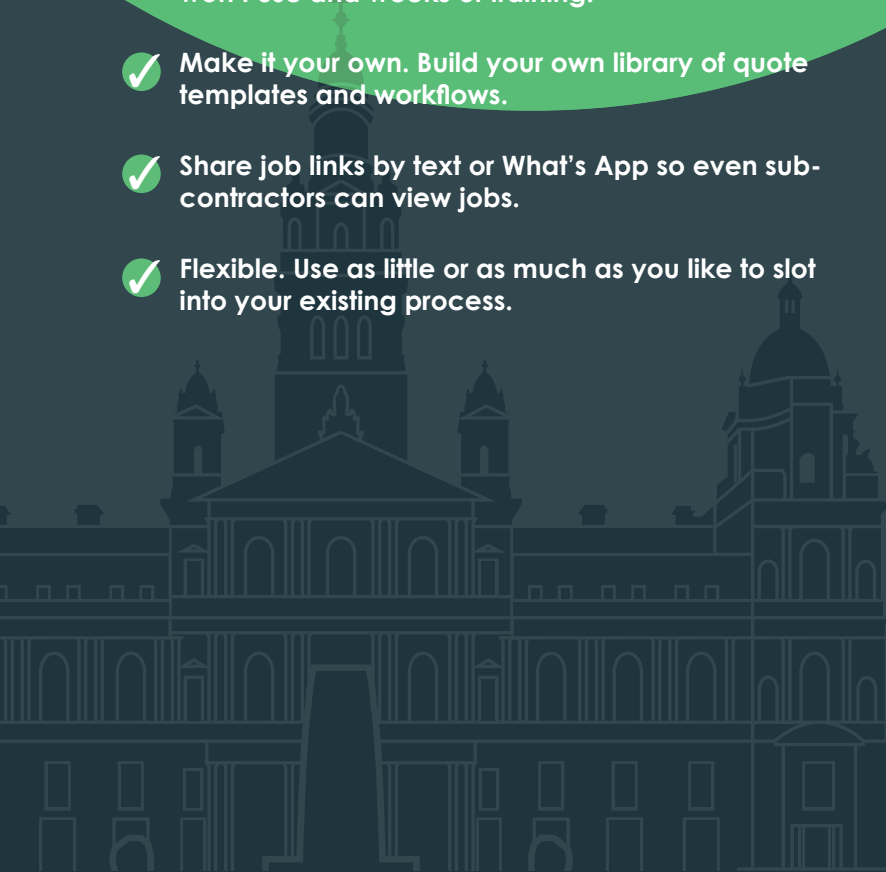
What do you get?

Create jobs easily

Jobs are the driver of any trade business and are the heart of TrackTrade. Book your jobs in quickly with a minimum of fuss.

- Set job priorities and flag emergency jobs.
- Locate duplicate jobs and group by customer work order.
- Find job records easily with our simple job browser.
- Add your own custom job fields, as needed.

Seamless allocation

Once the job's been created you can easily schedule engineer visits, and track the job journey from the Office Dashboard

- Quickly schedule callouts for one or multiple engineers.
- Engineers receive jobs on their phones instantly.
- Prioritise emergency jobs.

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trademark

Create Job

Customer
> Jane Smith

Job Description
> Complete Kitchen Re-fit

Address
> Type to auto-lookup

Date
> 31/10/20XX

Priority
> **Emergency** ⚠

Create Job

Office dashboard

All the day's activities are summarised on a single screen, showing all field staff and their current jobs.

- Five simple job pools organise your jobs.

- Field staff shown as Travelling, On Site, or Idle.

- Completions and Problems KPIs.

- Drill down on any job or staff member for details.
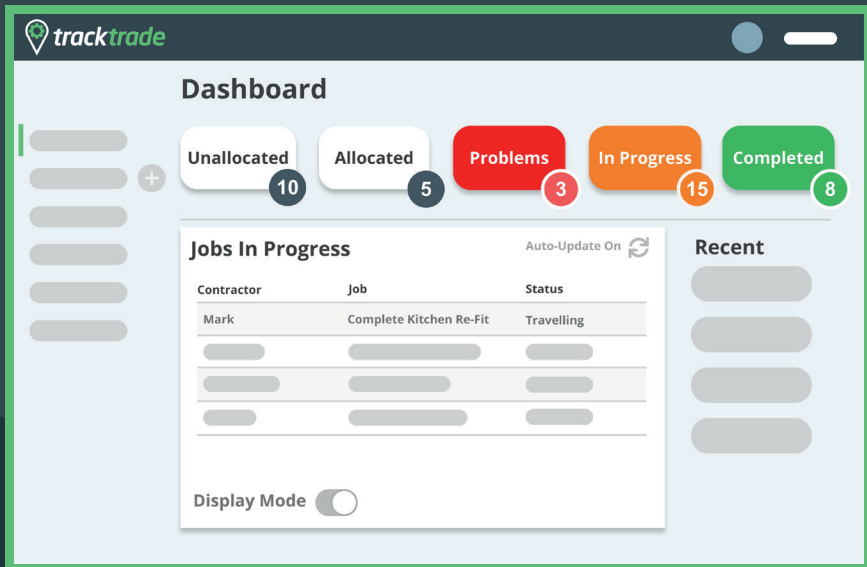
Some customers prefer to have the dashboard on a large LCD TV in the office. With "display mode" enabled, the sidebar menu closes and the dashboard will auto-cycle through all of your contractors.
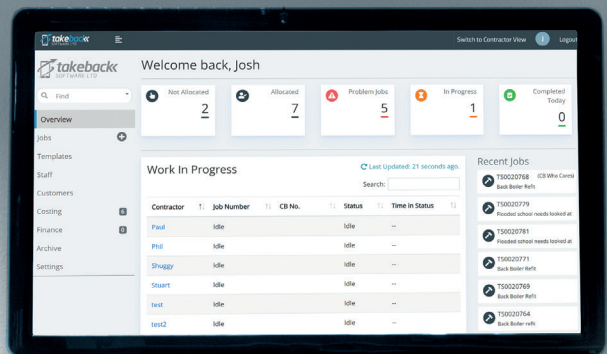
What do you get?

Friendly quotes

Create quick quotes and easy estimates with the friendly, professional quote builder.

- Save repeated quote items to your library.
- Enter your payment terms and dates.
- E-mail a link to your customer and get their signature.
- Quote for additional out of scope work.
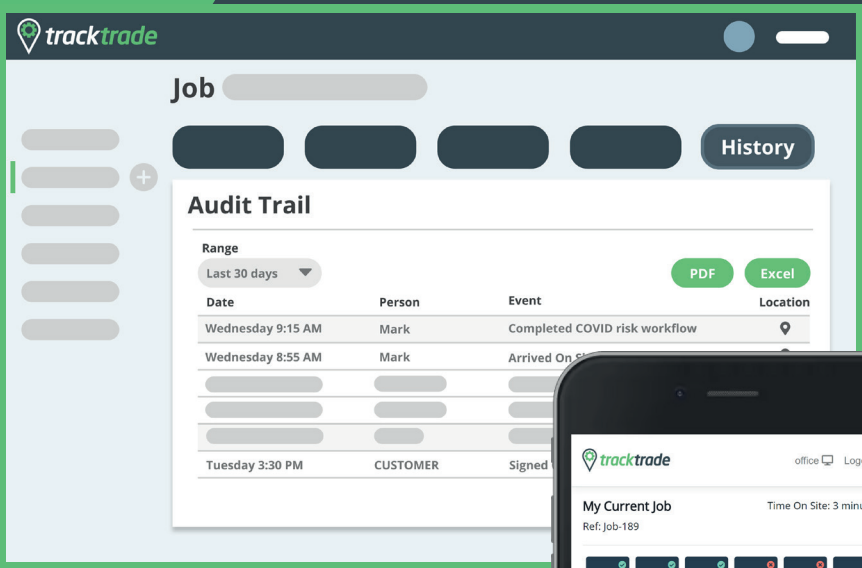

Powerful Workflows

Create task lists with your job specifications and save them as workflows. Engineers are able to sign off what they've done, enter measurements, attach evidence to any task, and sign off on their work when it's done.

Detailed audit trails

Every job on TrackTrade has an extensive audit trail, detailing every action completed by staff.

- Time, date, and GPS location (where available).
- See who entered each change.
- View start, end and travel times.
- Export to Excel for your own record-keeping.

tracktrade

Job

History

Audit Trail

Range
Last 30 days ▼

PDF | Excel

Date	Person	Event	Location
Wednesday 9:15 AM	Mark	Completed COVID risk workflow	📍
Wednesday 8:55 AM	Mark	Arrived On S...	
Tuesday 3:30 PM	CUSTOMER	Signed	

tracktrade
office 🖥 Logout

My Current Job
Ref: Job-189

Time On Site: 3 minutes

Details | Photos | Materials | Signature | Tasks | Hours

Before Photos (3 photos)

📷

After Photos (3 photos)

📷

Suspend Job 🚫 | Complete Job ⊕

Every picture tells a story

TrackTrade puts photo evidence front and center. Capture before and after photos on each job. Photos can be taken on site using any smartphone or tablet and appear instantly in the office. We strip sensitive metadata out of the photos for GDPR compliance and compress them to reduce your data charges and keep the app fast.
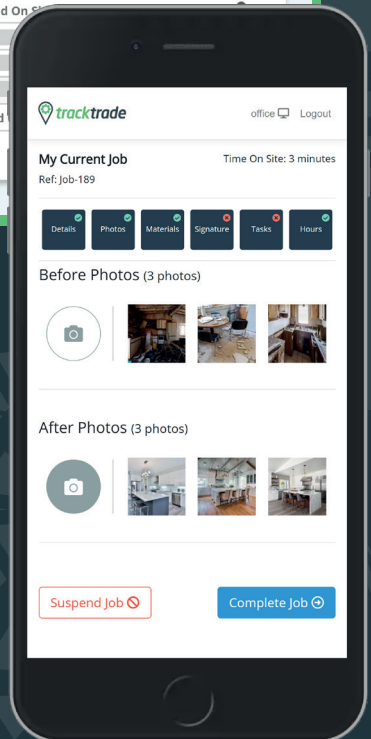
Get In Touch

If you're interested in TrackTrade, we'd love to hear from you. We can travel to your office or facilitate a remote demo via Zoom/Webex/Teams.

Email: sales@takebacksoftware.com
Tel: 0141 280 2232

We're located at:
Unit 1/2 Festival Court, Brand Place, Glasgow, G51 1DR

www.tracktrade.co.uk

work smart. use tracktrade.