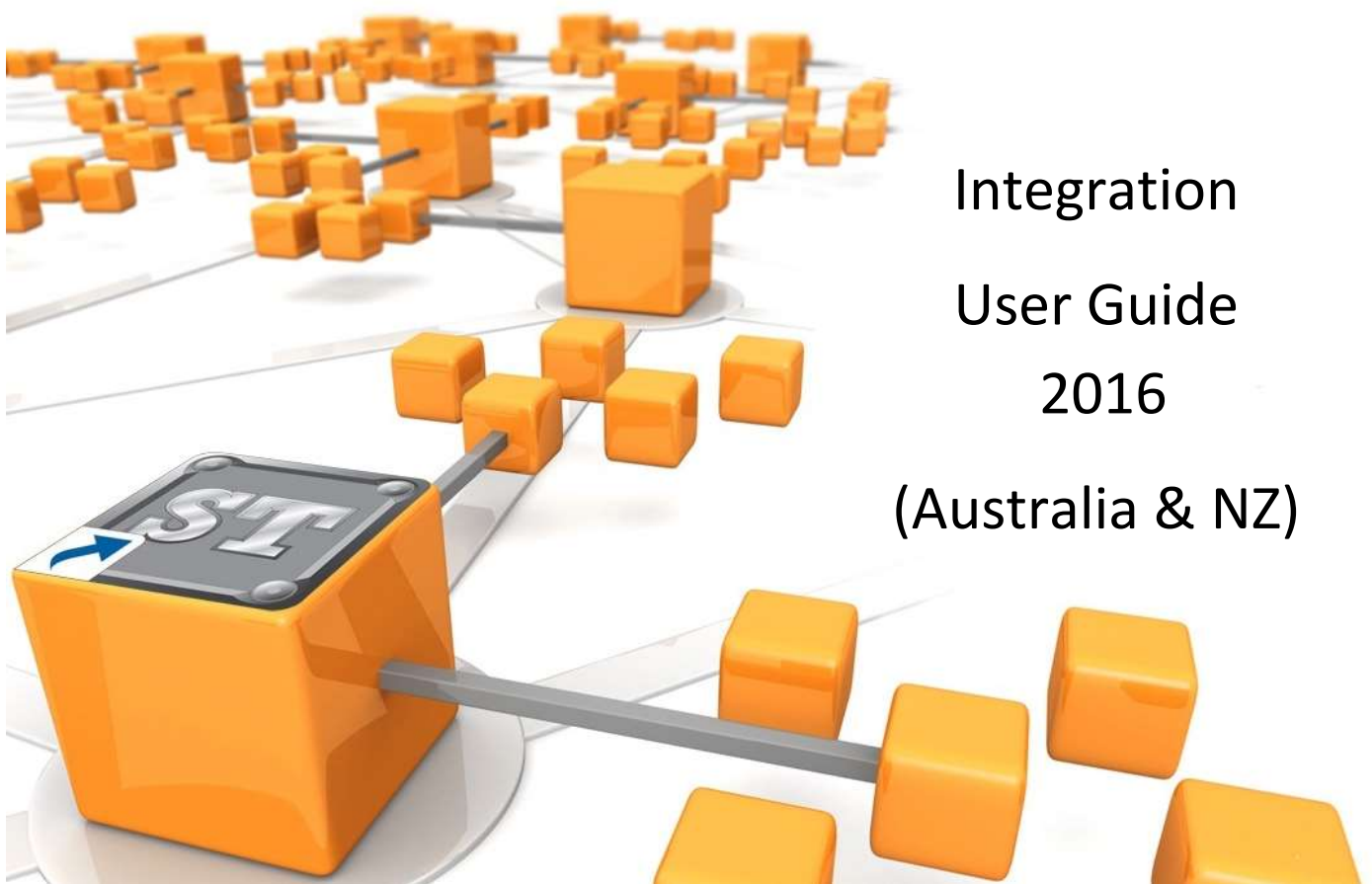


SmartTrade *ULTIMATE*

TELETRAC NAVMAN



Integration

User Guide

2016

(Australia & NZ)

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1. Version

This user guide was released on 15 June 2016 and is for SmartTrade Ultimate version 6.1.27.155.

2. Introduction

The integration allows SmartTrade users to:

- View maps displaying vehicle and job locations.
- If the vehicle has a Teletrac Navman in-cab display, dispatch jobs and send messages from SmartTrade to Navman (but not from the vehicle to SmartTrade)
- Post time and mileage data from Teletrac Navman to SmartTrade jobs.

The best way to use the integration depends on the Teletrac Navman setup, which may differ between vehicles, and on whether field employees have SmartTrade Mobile. We suggest that you call us to discuss suitable workflows.

3. Setting up

Contact SmartTrade's support team (Aus 1800 350 495; NZ 0800 327 943; support@smartrade.biz). We will help with the set-up (the set-up instructions are in the Appendix). 2 preliminary requirements are:

- A connection user name and a password from Teletrac Navman. SmartTrade can arrange this, with your permission, but it may take up to 24 hours.
- At least 1 SmartTrade Ultimate licence. If only one person schedules and dispatches jobs then 1 Ultimate licence should be sufficient; the other users can use Essential licenses.
If multiple users need to use the Teletrac Navman function in SmartTrade at the same time, then additional Ultimate licences will be required.

Or the interface to work, the computer or computers running SmartTrade Ultimate must be connected to the internet.

4. Using the Teletrac Navman features of SmartTrade Ultimate

Talk to us about workflows that suit your configuration. This will depend on the equipment (fleet tracking only, fleet tracking + in cab display etc), which may differ between vehicles, and on whether your field employees are equipped with SmartTrade Mobile.

Transmissions between SmartTrade and Teletrac Navman units in vehicles aren't instantaneous, typically taking a minute or two, and can only happen when the vehicle ignition is on.

Teletrac Navman records the vehicle's location when certain events occur, such as ignition on or off, and if no event occurs then about every 2 minutes. SmartTrade stores the time and location data for up to 90 days.

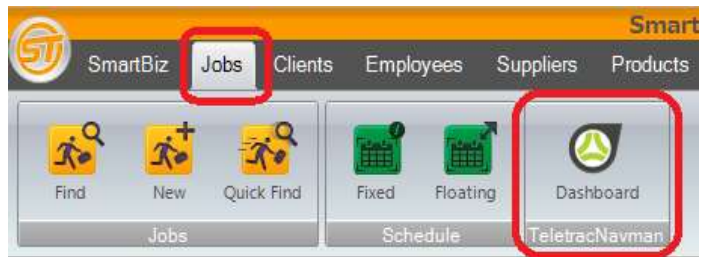
When a vehicle equipped with a Teletrac Navman unit is first linked to SmartTrade, only data for the last 8 days is available. The number of days' data available will increase day by day until it reaches the maximum number of days.

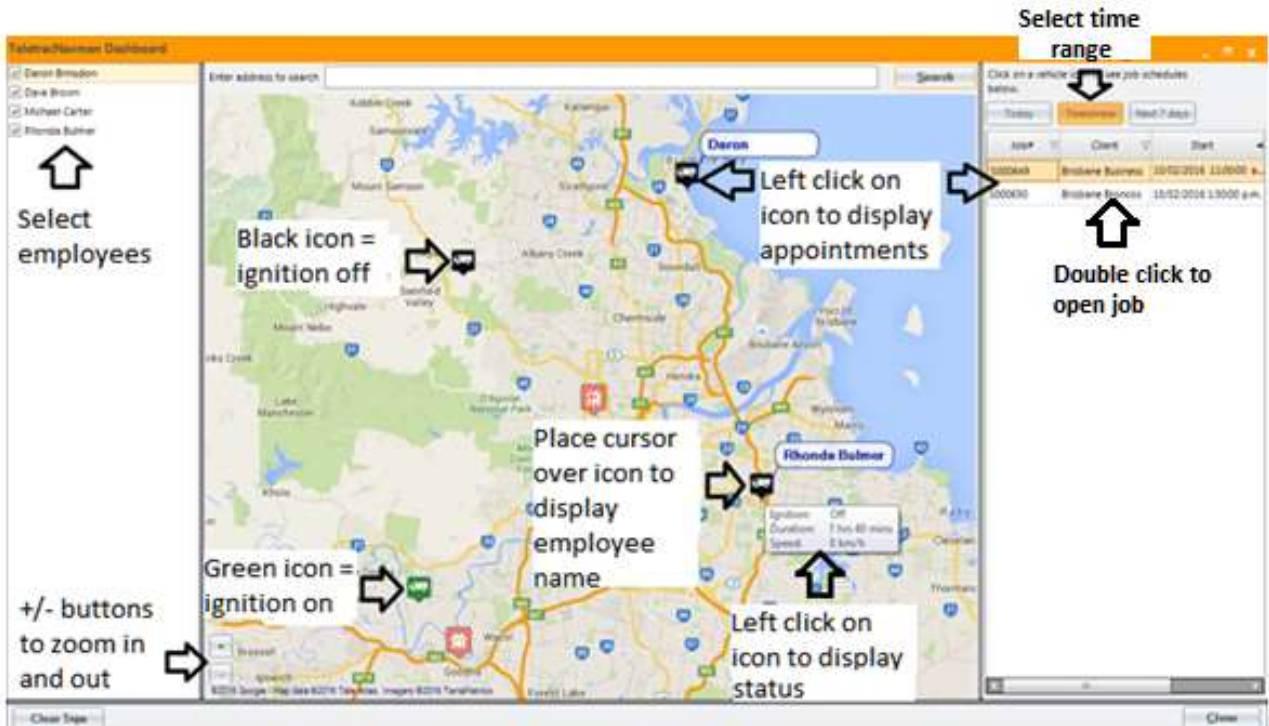
5. Teletrac Navman dashboard in SmartTrade

Open the dashboard from the Jobs menu.


Actions that can be initiated from the dashboard include:

- Search for an address
- Add a new client for a location
- Add a job for a location
- View job appointments for today, tomorrow or the next 7 days.
- Find jobs for a location
- See vehicle status (ignition on or off, speed ...)
- Open a job from the location icon
- Send a message to a vehicle (only if the vehicle has a Teletrac Navman in-cab display)
- Show recent trip routes

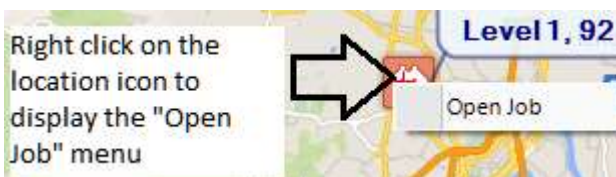




- To see an employee's vehicle in the map at the last recorded location, tick their name in the left hand panel. When you close and reopen this form, SmartTrade remembers the last selection.
- To display the job appointments for an employee in the right hand panel, click on the vehicle icon. Choose between 'Today', 'Tomorrow' or 'Next 7 days'.
Note: if more than one employee is assigned to a vehicle, only the job appointments for the first employee selected will be displayed. Because of this, it is easier to select the primary person for each vehicle in the left panel (e.g. don't tick the apprentices).

To zoom in or out, use the  buttons in the left bottom corner of the map, or the wheel if using a mouse.

To open a job, right click on the location icon and then click "Open Job".

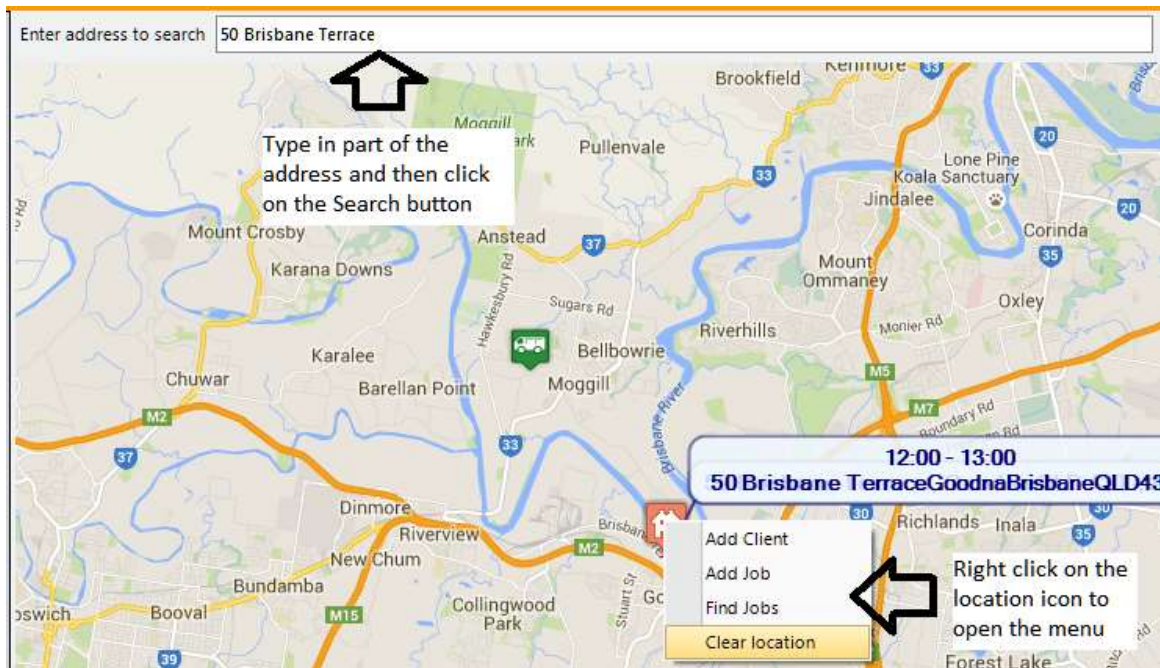


The dashboard is "floating"; drag it to a 2nd monitor, and keep it there while you continue working in SmartTrade on your 1st monitor. The dashboard auto-refreshes every 1-2 minutes.

5.1.Address search

Type any part of an address into the search field at the top of the central panel. Press the <Enter> button, or click the Search button and if the address is valid, it will appear on the map as below, with a binoculars

icon .



5.2.Actions using the location icon.

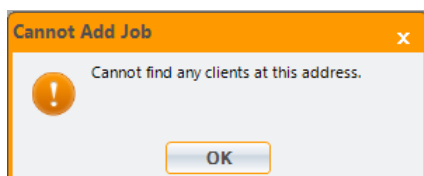
Right-click on the location icon to display a menu with 4 options:

5.2.1. Add Client

Opens the “Add New Client” screen in SmartTrade with the address already filled in.

5.2.2. Add Job

First it checks if a client already exists for this address. If a client cannot be found, the following message appears. Add a new client first (see section 5.2.1).




Otherwise if there is a client for the selected address, the “Add New Job” screen is opened with the Client and address details filled in.

Important! Finding a client address in SmartTrade from the location in the map depends on the address structures being similar (e.g. “Brisbane Terrace” in the map won’t match “Brisbane Tce” in SmartTrade). When searching, avoid using words that may be abbreviated. If you think that there is an existing client at that location, search using Find Clients.

5.2.3. Find Jobs

Opens the “Find Jobs” screen with the Site Address field filled in from the Google Maps location.

5.3.Actions using the vehicle icon

Place the cursor over the  icon to display the employee’s name:



Left-click on the vehicle to display the vehicle status:



The vehicle icon is black if the ignition is off.

Right-click to open the menu

5.3.1. Send Message

The “Teletrac Navman Message” screen is opened by right clicking on a vehicle icon in the Teletrac Navman map in a job or in the Teletrac Navman dashboard, and selecting “Send message”.



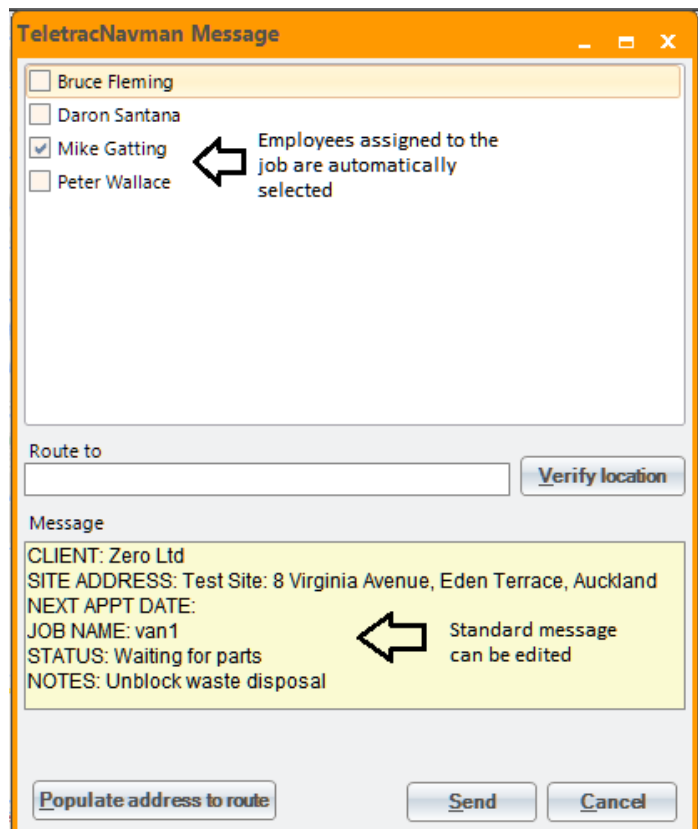
- Messages can be sent to multiple vehicles.
- Messages can only be sent from SmartTrade via to vehicles equipped with a Teletrac Navman display unit. Messages and replies can't be sent from the vehicle to SmartTrade.
- The outgoing message isn't saved in SmartTrade, although a history event is logged.

The vehicle that you click on will be automatically selected as a recipient of the message..

- Tick any other employees that you want to receive this message.
- Type in a message (required, max 400 characters).
- To enter an optional “Route to” address, either:
 - Click on the “Populate address to route” button;
 - or
 - Type in an address, and then click the “Verify location” button to ensure it is a valid address

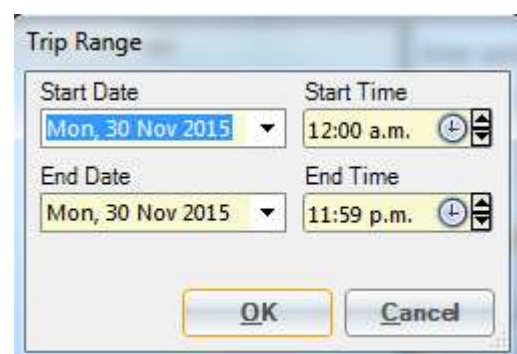
If the message is sent and the location was not found by Teletrac Navman, no route address will be sent to the Teletrac Navman console.

- Click the “Send” button.

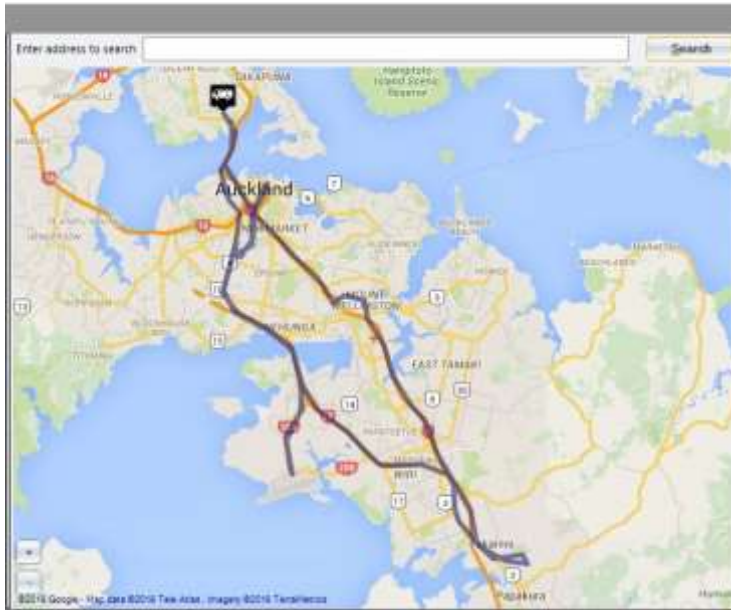


5.3.2. Show Trip

Opens the Trip Range screen, allowing start and finish dates and times to be defined (maximum of a 24 hour time span).



Click the OK button and the route during the chosen date/time range is displayed in the map.



Click the “Clear Trips” button (in the bottom left corner) to revert to the standard map view.

SmartTrade stores trip data for the last [60] days, so tracking for earlier days has to be done in the Teletrac Navman system.

5.3.3. Post Trip to Job

This function allows:

1. Time to be posted from Teletrac Navman to SmartTrade timesheet entries (and then to line items in a SmartTrade job).
2. Mileage to be posted from Teletrac Navman to line items in a SmartTrade job.
3. Routes to be displayed based on ignition on/off events.
4. All recorded time and location points to be displayed.

The ability to post mileage (as kms) and time to SmartTrade jobs is very useful for those users, who charge travel time and/or mileage to jobs. This is common in country and rural areas where employees may have to travel considerable distances to and from jobs.

TeletracNavman Trip

From: Mon, 16 May 2016 12:00 a.m. **Previous/next days**

To: Mon, 16 May 2016 11:59 p.m. **< >** **Search**

Location	km To	Travel To	Ignition Off	Time At	Ignition On	Time From
<input type="checkbox"/> 6 Lawson St, Byron Bay NSW 2481, Australia	208	02:23	11:56 a.m.	00:15	12:11 p.m.	00:43
<input checked="" type="checkbox"/> 79 Southern Cross Dr, Ballina NSW 2478, Australia	36	00:43	12:54 p.m.	00:15	01:11 p.m.	02:32
<input checked="" type="checkbox"/> 15 Lawson St, Byron Bay NSW 2481, Australia	37	02:32	03:40 p.m.	01:32	05:12 p.m.	00:10
<input type="checkbox"/> 1-2 Lighthouse Rd, Byron Bay NSW 2481, Australia	3	00:10	05:21 p.m.	00:02	05:22 p.m.	00:02
<input type="checkbox"/> 1-2 Lighthouse Rd, Byron Bay NSW 2481, Australia	0	00:02	05:24 p.m.			

Total distance: 73 **Total km for selected ignition on/off events**

Show All Trip **Trip actions** **Close**

Post Mileage (km) to Job
Post Time to Timesheets

Select ignition on/off events and display route

TeletracNavman Trip

From: Mon, 16 May 2016 12:00 a.m.

To: Mon, 16 May 2016 11:59 p.m. **Search**

Location	km To	Travel To	Ignit
<input type="checkbox"/> 6 Lawson St, Byron bay NSW 2481, Australia	208	02:23	11:5
<input checked="" type="checkbox"/> 79 Southern Cross Dr, Ballina NSW 2478, Australia	36	00:43	12:5
<input checked="" type="checkbox"/> 15 Lawson St, Byron Bay NSW 2481, Australia	37	02:32	03:4
<input type="checkbox"/> 1-2 Lighthouse Rd, Byron Bay NSW 2481, Australia	3	00:10	05:2
<input type="checkbox"/> 1-2 Lighthouse Rd, Byron Bay NSW 2481, Australia	0	00:02	05:2

Total distance: 73

Show All Trip **Trip actions** **Close**

Post Mileage (km) to Job
Post Time to Timesheets

Post mileage to SmartTrade jobs

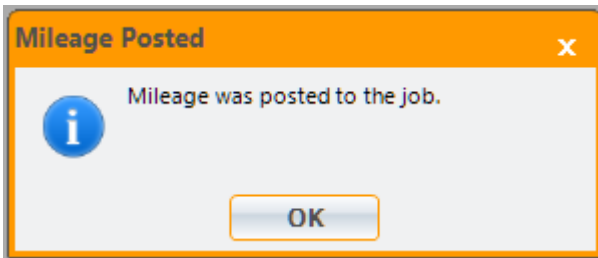
1. Open the "Trip actions" list, and click on "Post Mileage (km) to Job" to open Select Jobs
2. Find the appropriate job
3. Click on the "Select" button

Trip actions

Post Mileage (km) to Job

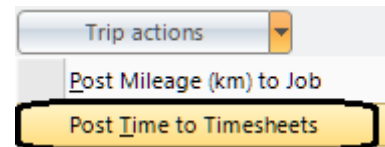
Post Time to Timesheets

4. When the “Mileage Posted” popup appears, click on the “OK” button.

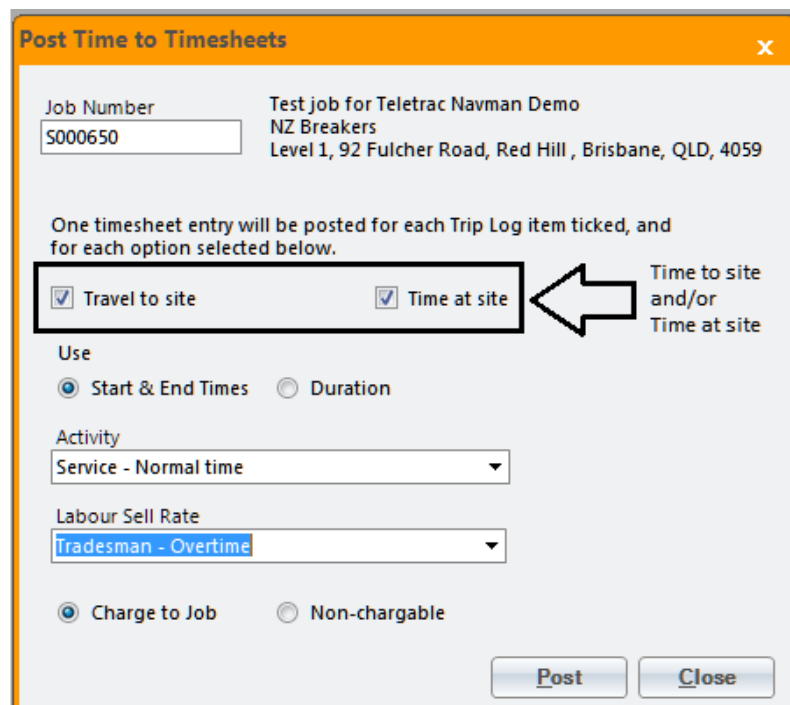


Post time to SmartTrade timesheets

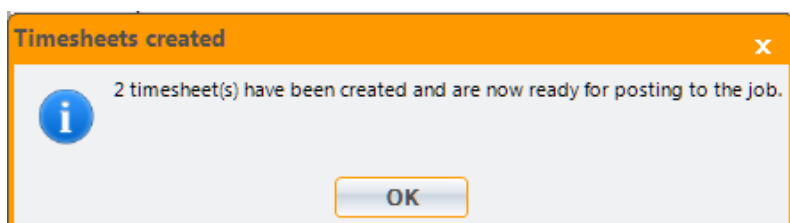
1. Open the “Trip actions” list, and click on “Post Time to Timesheets”
open Select Jobs
2. Find the appropriate job
3. Click on the “Select” button to open the “Post to Timesheets” form
4. Select:



- a. Time to be posted (either Travel time to site, Time at site, or both)
 - b. Time format to use (Start & End Times or Duration)
 - c. An activity (optional)
 - d. Labour Sell Rate
- Note: only the rates that have been linked to the employee are available.
- e. Charge to Job/ Non-chargeable



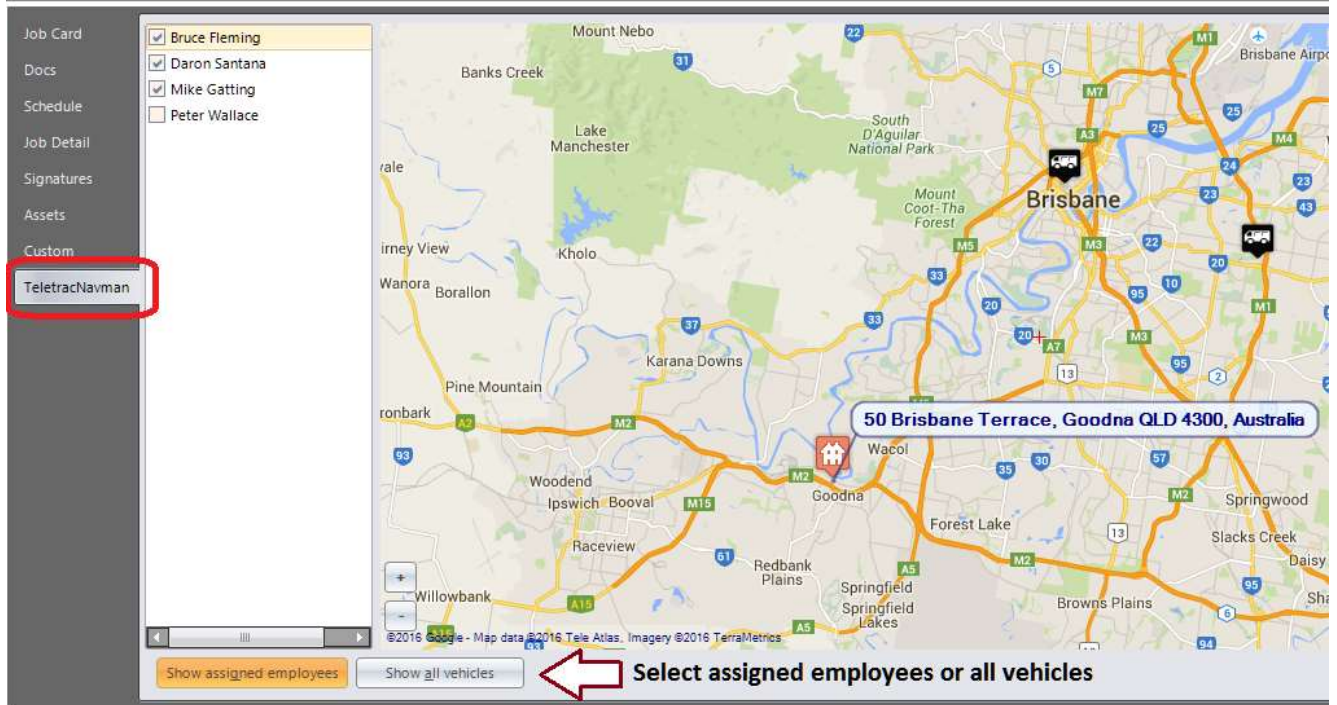
5. Click on the “Post” button.
6. When the “Timesheets created” popup appears, click on “OK” to create the timesheets.



6. Job map



Click on the TeletracNavman tab in any job and a house icon will mark the job location and display the address.



Use the buttons at the bottom left corner of the map to select which vehicles are displayed:

- **Show assigned employees** = displays all vehicles that are assigned to this job (via an assigned employee)
- **Show all linked vehicles** = displays all vehicles

6.1.Actions using the vehicle icon



Place the cursor over the icon to display the employee's name, and right click to open the menu:



6.1.1. Send Message

See section 5.3.1

6.1.2. Assign to job

If this menu item is greyed out, the employee is already assigned to the job.

6.1.3. Assign to job and send

Assigns the employee to the job, and opens the Teletrac Navman Message screen. See section 7.

6.1.4. UnAssign from job

If this menu item is greyed out, the employee is not currently assigned to the job.

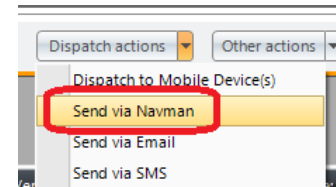
6.1.5. Post Trip to Job

See section 5.3.3. As you are working in the job, there is no need to select a job when posting mileage to jobs or time to timesheets.

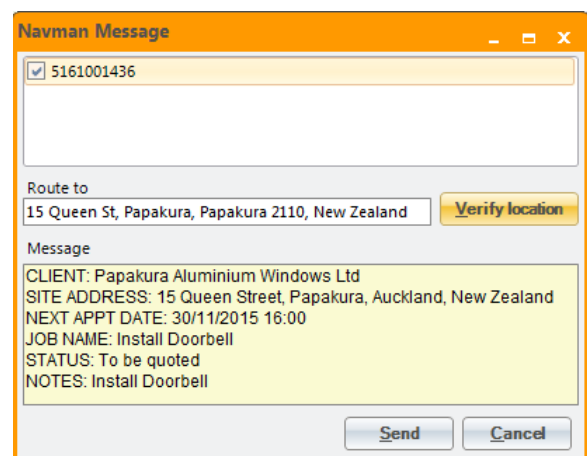
7. Dispatching a job as a Teletrac Navman message

If a vehicle has a Teletrac Navman display unit in the cab, job information can be sent from SmartTrade as a message:

- a) Open the job and ensure that the appropriate employee is assigned to the job.
- b) Click Dispatch actions => Send via Teletrac Navman.



- c) The "Teletrac Navman Message" form.
- d) Edit the message, add a "Route to" if required, tick the appropriate vehicles and click the "Send" button.
- e) The Job's history will show that the job was sent via Teletrac Navman.

A screenshot of a 'Navman Message' form. The form has a title bar with the text 'Navman Message' and standard window controls. It contains a list box with a checked item '5161001436'. Below the list box is a 'Route to' section with the text '15 Queen St, Papakura, Papakura 2110, New Zealand' and a 'Verify location' button. The 'Message' section contains the following text: 'CLIENT: Papakura Aluminium Windows Ltd', 'SITE ADDRESS: 15 Queen Street, Papakura, Auckland, New Zealand', 'NEXT APPT DATE: 30/11/2015 16:00', 'JOB NAME: Install Doorbell', 'STATUS: To be quoted', and 'NOTES: Install Doorbell'. At the bottom of the form are 'Send' and 'Cancel' buttons.

APPENDIX – Setting up the integration between Teletrac Navman and SmartTrade Ultimate

Before starting, obtain an API user name and password. Email Teletrac Navman citing the customer name and requesting “API user name and password to allow integration between Teletrac Navman and SmartTrade”.

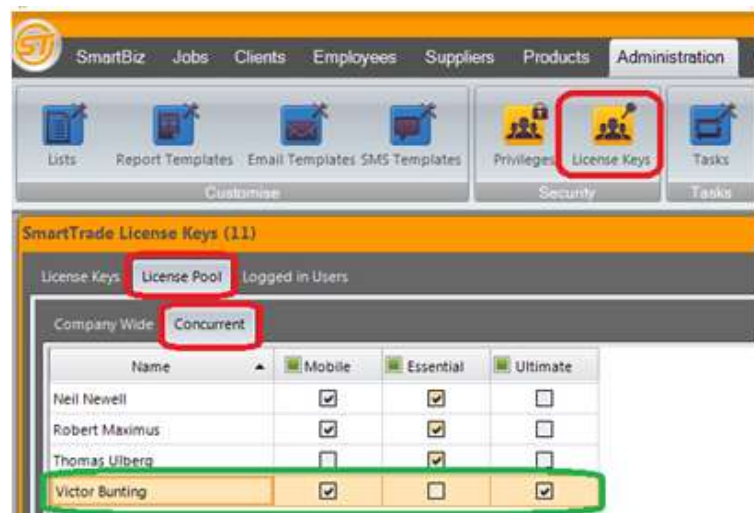
In NZ: support@navmanwireless.co.nz

In Australia: wdgaussupport@navmanwireless.com or

- Select employees to use the Teletrac Navman maps in SmartTrade and assign the appropriate privileges.
- Enter the Teletrac Navman connection user name and password into SmartTrade preferences.
- Set up vehicles in SmartTrade and link these to the corresponding Teletrac Navman vehicles.
- Assign your employees to vehicles.
- Log into the Teletrac Navman page in the

1. Select employees to use the SmartTrade Ultimate and assign appropriate privileges

- Open the SmartTrade License Pool Concurrent tab (Administration ⇒ License Keys ⇒ License Pool tab ⇒ Concurrent tab)
- In the Ultimate column tick the employees who are allowed to use Ultimate.



Each selected employee must be a member of a security group that has appropriate privileges. Relevant privileges are:

- Navman Dashboard
- Preferences – Navman Edit (usually only granted to Administrators)
- Preferences – Navman View
- Vehicle – Delete
- Vehicle – Find
- Vehicle - Maintain

For help on privileges and security groups, in SmartTrade go to Help ⇒ Contents ⇒ Administration ⇒ Security Group Privileges.

2. Enter the Teletrac Navman connection user name and password into SmartTrade Preferences

Open the Teletrac Navman Preferences panel (Preferences ⇒ Plug-ins ⇒ TeltracNavman).



- Tick "Integrate with Teletrac Navman"
- Enter the connection user name and password obtained from Teletrac Navman
- Select the country.
- If intending to post mileage from Teletrac Navman to jobs in SmartTrade Ultimate, select a MyData item to be the default charge-out rate. This rate can be changed or edited when posting mileage to jobs.

If there isn't a suitable item in MyData, create a new item.

3. Set up vehicles in SmartTrade and link them to vehicles in Teletrac Navman

SmartTrade Ultimate allows vehicles to be set up, as a special asset class. Vehicles can be set up whether or not they have Teletrac Navman units, but to start, enter those with units. In the future, add the other vehicles.

To add a vehicle, click on Assets and then New:



Enter the vehicle details

If the Teletrac Navman Preferences are set up (see above), the TeletracNavman vehicle field will display a dropdown list of all vehicles equipped with Teletrac Navman units. Select the appropriate vehicle (a vehicle in SmartTrade can be linked to only one vehicle in Teletrac Navman).

Description	Reg Number
Deron Q300	51950
Dave Brown	1EAA 955
Dave Brown 2	1EUC201 - Prade
George Feher Q4	YBR43J
Matt McK Demo Case	Ex Black Knight 5
Matt McKenzie	CJL135
Michael Carter Q4	185KUE
Nuno Q300	

4. Assign your employees to vehicles

To link an employee to a vehicle:

- Open the employee record
- Select a vehicle.

Each employee can be linked to one vehicle, but multiple employees can be assigned to a vehicle e.g. in a Tradesman + Apprentice situation. If the apprentice swaps vehicles, update the apprentice's employee record to link to the new vehicle.

The Employee column of the Find Vehicles grid shows which, if any employees are linked to the vehicle.

Regist...	Type	Brand/make	Model	Status	Year	Colour(s)	VIN	Engi...	TeletracNavman	Employee
12345	Car	Rolls Royce	Phantom		2015	Silver			Michael Carter Q4	Michael Carter
C/JL135	Car	Ferrari	Daytona		2010	silver			Rhonda Bulmer	Rhonda Bulmer
5195IO	Car	Lada	Samara		1978				Daron Q300	Daron Brinsdon
1EAA95	Van	Toyota	Hilux	High	2013	Black			Toyota 86GTS	Dave Brown

5. Ensure that each employee has at least one labour rate assigned

This is optional and only needed if intending to post travel and on-site time from Teletrac Navman to SmartTrade timesheets,

MyData Cate...	Product Code	Description	Unit	Unit C...	Pricing	Fixed Sell P...	Invoice Item C...
Labour	LABOUR-O	Tradesman - Overtime	hour	\$45.0000	Fixed Sell Pri...	\$109.00	LABOUR
Labour	LABOUR-T	Labour - Tradesman	hour	\$40.0000	Fixed Sell Pr...	\$100.00	LABOUR

6. Test the connection

- Open the Teletrac Navman dashboard (Jobs TeltracNavman ⇌ Dashboard).
- Tick all employees and check that the vehicles are displayed. There may be a delay of several minutes before the first vehicle data is transmitted from the Teletrac Navman to SmartTrade.