

CURRICULUM RESOURCE

Digital Tools for Apprenticeship: Tradify for iPhone and Android

OALCF ALIGNMENT

| Competency | Task Group | Level |
|--|-----------------------------------|-------|
| Competency A - Find and Use Information | A1. Read continuous text | 2 |
| Competency A - Find and Use Information | A2. Interpret documents | 2 |
| Competency B - Communicate Ideas and Information | B3. Complete and create documents | 2 |
| Competency C - Understand and Use Numbers | C2. Manage time | 2 |
| Competency D - Use Digital Technology | N/A | 2 |

Goal Paths (check all that apply)

- Employment
- Apprenticeship
- Secondary School Credit
- Postsecondary
- Independence

Embedded Skills for Success (check all that apply)

- Adaptability
- Collaboration
- Communication
- Creativity and innovation
- Digital
- Numeracy
- Problem Solving
- Reading
- Writing

NOTES: Part three of a six-part series on basic workplace and apprenticeship digital tools.

ACKNOWLEDGEMENTS

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This Employment Ontario service is funded in part by the Government of Canada and the Government of Ontario through the Canada-Ontario Job Fund Agreement.



The opinions expressed in this report are the opinions of Community Literacy of Ontario and do not necessarily reflect those of our funders.

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DIGITAL TOOLS FOR WORKPLACE AND APPRENTICESHIP BASICS

Note for practitioners:

This series of **Skills for Success Curriculum Resources** is a beginner's guide to the certain handy digital tools for use in the workplace or on apprenticeships. The goal is to provide basics tools to employed learners, or learners seeking employment, so that they can thrive as employees.

This series looks at a range of apps, from imperial-to-metric conversion apps guides to measurement and business basics apps. The goal of the series is to give employees an expanded digital toolkit for use on the job.

These resources are learner-based and activity-focused, with each topic area serving as a walk-through of the information or technology, followed by personalized activities. The activities invite learners to respond to lesson material or explore their own ideas on the subject.

The series is divided into six sections that can be used separately or in tandem:

- Metric Conversions (for iPhone and Android)
- AR Ruler (for iPhone and Android)
- Tradify (for iPhone and Android)
- aTimeLogger (for iPhone and Android)
- St. John Ambulance (for iPhone and Android)
- Server Life (for iPhone and Android)

DIGITAL TOOLS: Tradify

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This is Section Three: Tradify for iPhone and Android

Overview

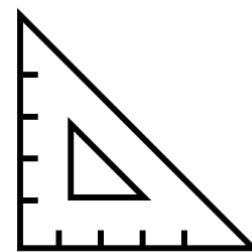
Tradify Overview

Tradify is an app used by tens of thousands of tradespeople. It helps manage the admin side of a tradesperson's business. It helps with:

- tracking enquiries
- quotes
- scheduling
- invoices
- tracking jobs and customers

The Tradify app allows tradespeople to have their business paperwork in one place: on their phone. This helps with organization and reduces mistakes. All the important details of the business are stored and sorted.

- This lets tradespeople focus their attention and talents on the job at hand!



This resource will help you download the Tradify app. It will teach the basics of the Tradify app and help you get familiar with the main features.

Pro and Cons

Tradify Pros and Cons

Some benefits to the Tradify app:

- simple features and easy to use
- templates for things like quotes and invoices
- Tradify's support team will help with your concerns
- helps you to manage employee schedules
- can be used on lots of different platforms like iPhones, Androids, and laptops

Watch the video below to get a sense of how Tradify is helping this plumbing company:



Some drawbacks to the Tradify app:

- there is a monthly fee to use Tradify, but you will get a chance to try it for free



Let's discuss!

What is **your** experience?

1. Are you a tradesperson? Yes No

2. Are you independent or part of a company? Independent Company

3. Do you have employees? Yes No

4. What is some admin work that you have to do? Check all that apply:

Respond to enquiries

Writing quotes

Keeping track of customers

Keeping track of jobs and sites

Writing invoices

Scheduling

5. Which of these admin jobs do you find the most challenging? Why?

Downloading for iPhone

Tradify App

Now we will get started using the Tradify app for iPhone or Android smartphones. But first we need to download the app onto the phone.

1. Getting Tradify for iPhone

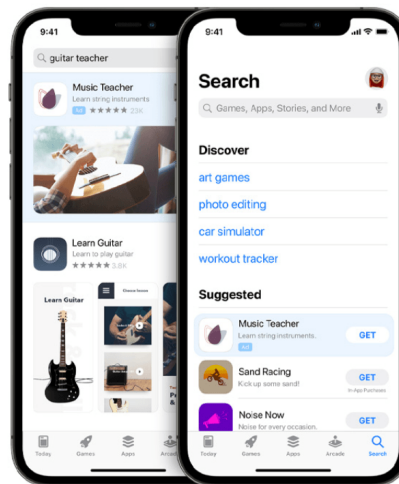
If you have an **iPhone**, start here. (If you have an Android, skip to section 2.)



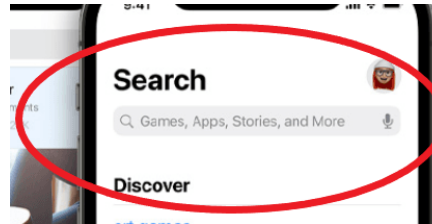
Tap the App Store icon:



The App Store looks like this:



Type in the search bar:
Tradify



Find the correct app. You may have to scroll down a little. Its icon looks like this:



Tap **GET**.

**New Task!**

Download the app.

- Follow the steps above and download the app.
- Make sure the icon appears on your phone.
- Once it's downloaded, skip ahead to section 3 and we will try it out!



Downloading for Android

2. Getting Tradify for Android

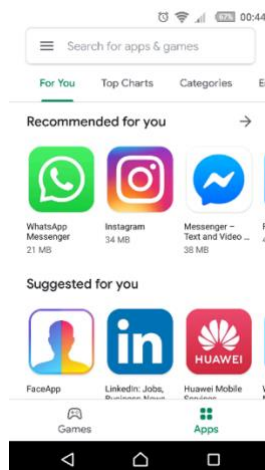
If you have an **Android**, start here. (If you have an iPhone, skip to section 3.)



Tap the Google Play icon:

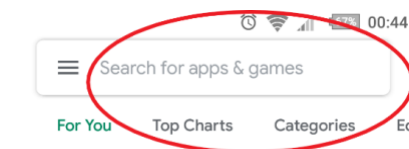


The Google Play store looks like this:



Type in the search bar:

Tradify



Find the correct app. You may have to scroll down a little. Its icon looks like this:



Tap **GET**.



**New Task!**

Download the app.

- Follow the steps above and download the app.
- Make sure the icon appears on your phone.
- Once it's downloaded, skip ahead to section three and we will try it out!



Using Tradify

3. Using Tradify

When you download Tradify, it will ask you for some personal information. It will ask for things like your name, address, email address, and phone number. It will also ask you for the name of your business.

- If your business doesn't have a name yet, just put down your name instead.

On the Tradify home screen you will see buttons at the bottom. They show you the main sections of the Tradify app:



We will go over each section one by one. They are organized as follows:

- The Schedule keeps track of **when** your jobs are. You can see the schedule by day, week, or month.
- The Jobs section contains a list of present, future, and past jobs. It shows all important details about the jobs.
- The Sales section allows you to keep track of enquiries, quotes, and invoices that are ongoing. It also allows you to make new ones.
- The Customer section contains a list of present and past customers.

Tradify On the Job

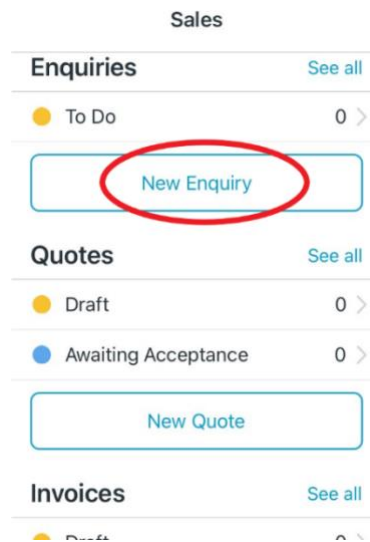
The easiest way to learn Tradify is to use it the way you would on the job. Usually, a job begins with an enquiry from a customer. Someone may have heard about your business from another customer and they call with a job for you. Let's start there.

Enquiries

To record a new enquiry, Tap the Sales button at the bottom of the phone:



The sales screen appears:



Tap New Enquiry.

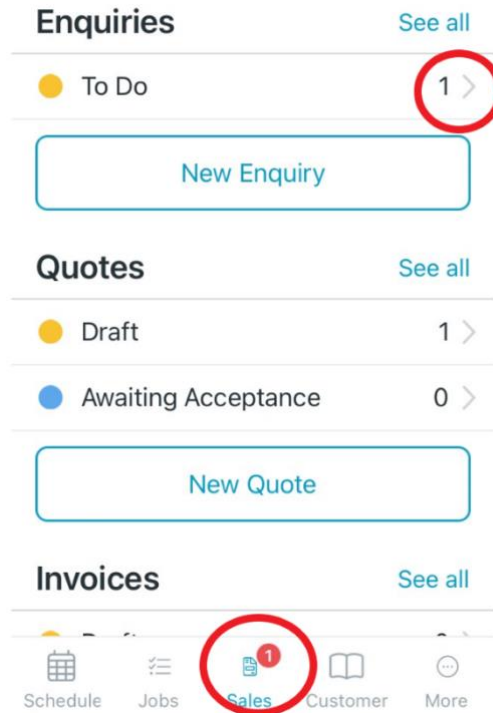
Let's pretend the enquiry is from a customer named G.

| Enquiry Information | |
|---------------------|---------------------|
| Name | Customer G |
| Phone | 141608055 |
| Email Address | Customer g@gmail... |

We would enter their contact information and a description of the job.

Once we've recorded the new enquiry, the app will remind us.

Now on the sales screen it tells us that there something “To do” in enquiries:

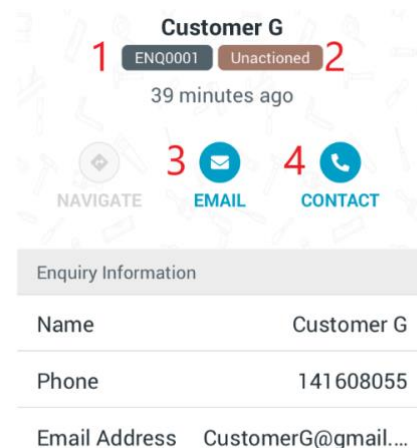


It also highlights that there’s something to be done with a red 1 on the Sales button:

If we tap To Do, we will be taken to a list of enquiries and then Customer G’s enquiry.

Here we see:

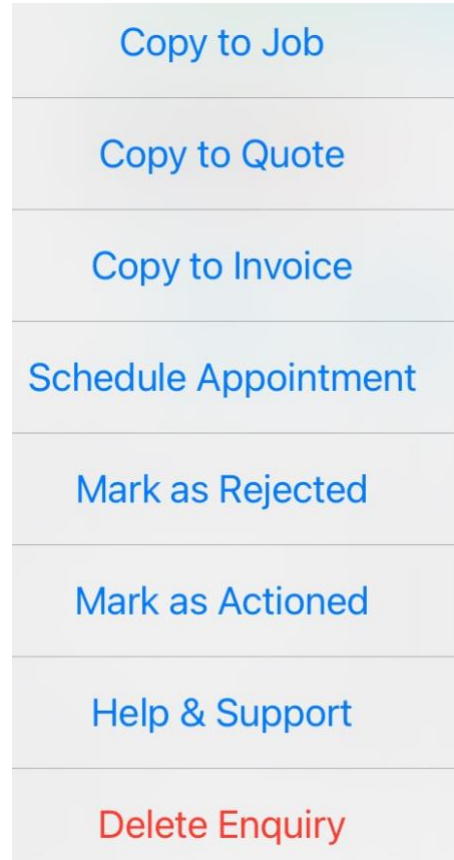
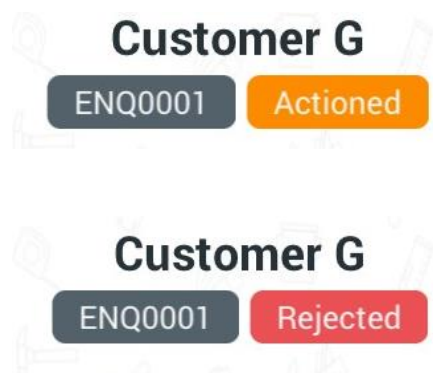
1. the enquiry number for records
2. whether the job has been actioned (this job has not)
3. a button for quickly emailing the customer
4. a button for quickly calling the customer



At the top of the screen there will also be an Enquiry Actions button:

Tapping this will give you many options:

The coloured tag next to the Enquiry number will change as you change the status of the enquiry:



**Now you try it.**

Record a customer enquiry.

You have received an enquiry for your services from Customer H. Customer H would like their water heater fixed.

Their email address is: CustomerH@gmail.com

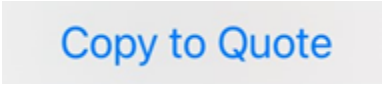
Their phone number is: 613-707-9999

- Go to the Sales screen.
- Create a New Enquiry by filling in Customer H's information.
- Check over the enquiry to make sure the information is correct.
- Go back to the Sales screen to check your To Do list.
- Go back into Customer H's enquiry and tap Enquiry Actions.
- Tap Mark as Rejected.
- Go back to the Sales screen.

Quotes

The next step in your workflow is writing a quote. Tradify has a template for quotes that makes this task simple. Let's write a quote for Customer G. One way to begin a quote in Tradify is to:

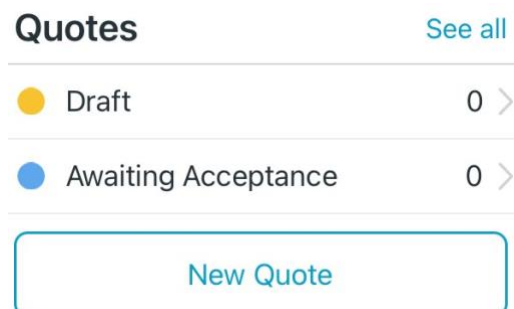
- go into Customer G's enquiry
- tap the Enquiry Actions button
- choose the option Copy to Quote

A rectangular button with a light gray background and the text "Copy to Quote" in blue.

You will be taken to the quote building page.

The other way to begin a quote is:

- go to the Sales screen
- scroll down to the Quotes option
- tap New Quote



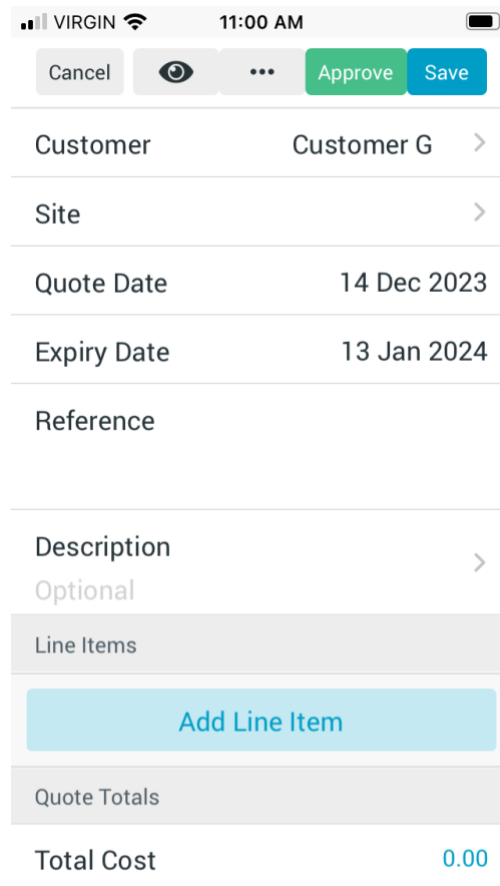
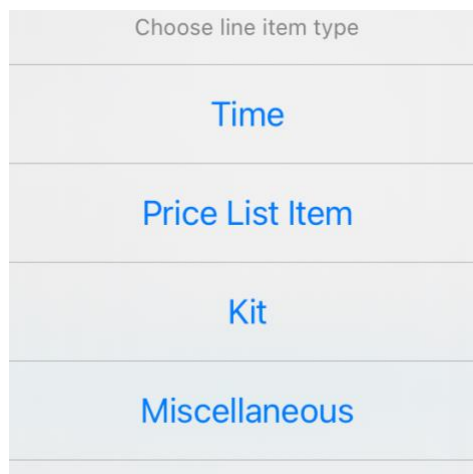
You will be taken to the quote building page.

The quote building page looks like this:

You can add information like:

- the site of the job
- a description of the job
- detailed costs

Choosing Add Line Item gives you several options for costs:



Tapping the three dots at the top of the screen gives you more options like:

- cancelling the quote
- emailing the quote
- revising the quote
- previewing the quote
- or creating an invoice from the quote

**Now you try it.**

Build a new quote.

Put together a quote to fix Customer H's water heater. After investigating the job you decide on the following costs:

Parts: 1 mixing valve: \$250.00

Labour: 3 hours work at \$175 per hour.

- Go to the Sales screen.
- Tap New Quote.
- Fill in the Customer field by adding Customer H's information.
- Add a description of the job.
- Add the line items from above.
- Tap the three dots at the top and then Preview Quote.
- Tap Save.

Your quote should look something like this:

| Draft Quote | | QT00001 | | |
|---|--|---|-----------------------------------|-------------------------------------|
| Mr & Mrs Daisy 123 Willow Street Clarence | Site Job Number Job Address Reference | Primary Dwelling JB00001 123 Willow Street Clarence RESIDENTIAL | Date Expiry Date | 11 December 2023 10 January 2024 |
| Quote Notes: | | | | |
| Visit property to supply and install part. | | | | |
| Provide certification and sign-off to customer. | | | | |
| Description | Quantity | Unit Price | Discount | Amount |
| Time | | | | |
| Installation and fitting time | 20 | 80.00 | 10.00% | 1,440.00 |
| | | | Subtotal | 1,440.00 |
| Materials | | | | |
| Metal part | 30 | 1.176 | 5.00% | 33.52 |
| | | | Subtotal | 33.52 |
| Misc | | | | |
| Certification and Sign-Off | 78 | 80.00 | | 6,240.00 |
| | | | Subtotal | 6,240.00 |
| Subtotal (includes a discount of 161.76) | | | | 7,713.52 |
| GST | | | | 941.03 |
| Total CAD | | | | 8,654.55 |

What do you find helpful about building a quote this way?

What do you find challenging about building a quote this way?

Invoices

The final stage in the workflow is billing the client when the work is completed. This will require you to write out an invoice. One way to start an invoice in Tradify is to:

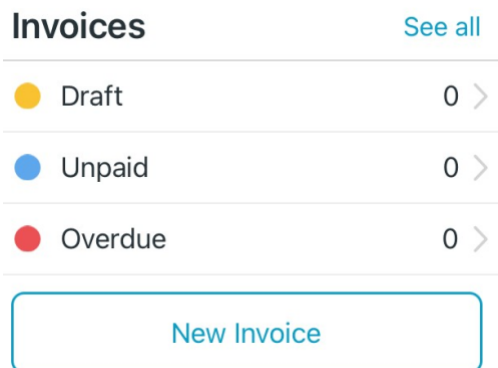
- go to your list of quotes and choose one
- once you are in that quote, tap the tree dots at the top
- you will be given the option to Create Invoice from Quote

Create Invoice from Quote

- you will choose which quote to use
- finally you will be taken to the invoice building page

The **other** way to begin an invoice is:

- go to the Sales screen
- scroll down to the Invoices option
- tap New Invoice



- you will be taken to the invoice building page.

There will be a few steps to completing the invoice. First you will be given the option of different invoice types. If you have already written a quote, you will usually choose **From a quote**.

From a quote

Full or partial quotes invoice with line items that match the quotes you choose

Then you will be able to choose the amount you will charge. If the final job cost matches the quote amount, you will choose **Copy Entire Quote Amount**.



Copy Entire Quote Amount



Then you will be able to view the final invoice. After reviewing it to be sure the information is correct, tap Approve in the top right corner. You will then be able to **send** the invoice to the customer.

Send Invoice?

This invoice has been approved. Do you want to email to your customer?

No

Yes

**Now you try it.**

Build a new invoice.

Put together an invoice for fixing Customer H's water heater. After finishing the job you decide costs in the quote line up with the costs of the job:

Parts: 1 mixing valve: \$250.00

Labour: 3 hours work at \$175 per hour.

- Go to the Sales screen.
- Tap New Invoice.
- Choose Customer H.
- Choose **From a quote**.
- Choose **Copy Entire Quote Amount**.
- Tap Approve in the top right corner.
- You should be prompted to **Send Invoice**. (Choose No.)

More Features

Tradify has many other features to help you stay organized. The features include important lists, scheduling, maps, and support.

1. Customers

As you receive new enquires, you will add customers to your client list. This list is one of the main sections of your Tradify app and can be accessed by the Customer button at the bottom of the home screen:



This list will show you your active customers and any customers you have archived:



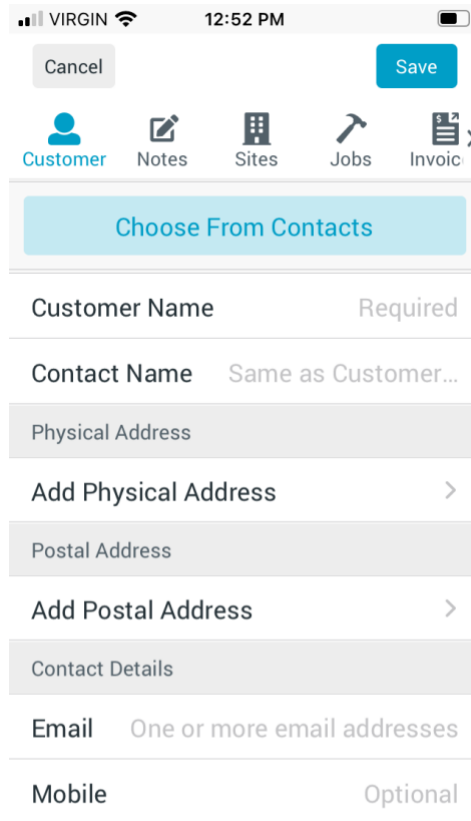
This symbol in the bottom right corner allow you to add new customers:



You will reach a new customer page and be able to fill in their information:

The bar at the top will allow to add other details like:

- notes about the customer or the work you have done for them
- the sites you have worked on for them
- the jobs you have done for them
- past and current invoices



Now you try it.

Make a new customer entry.

- Tap the Customer icon at the bottom of the home screen.
- Tap the blue circle in the bottom right corner.
- Fill out some customer information:
 - Customer B, email CustomerB@gmail.com
- Tap Notes at the top
- Add a note:
 - Customer B wants a leak fixed on an old toilet
- Tap Save

2. Jobs

The jobs page is similar to the customer page. It is a list of ongoing and past jobs. You access it using the Jobs icon on the bottom of the home screen:



It allows to add new jobs and see active and archived jobs. It even includes a timer to help you keep track of your work hours.

3. Schedule

The schedule can be accessed using the Schedule icon at the bottom of the home screen:



Your jobs will be uploaded here. You will be able to see them on a daily or weekly schedule. You can also see pending jobs:



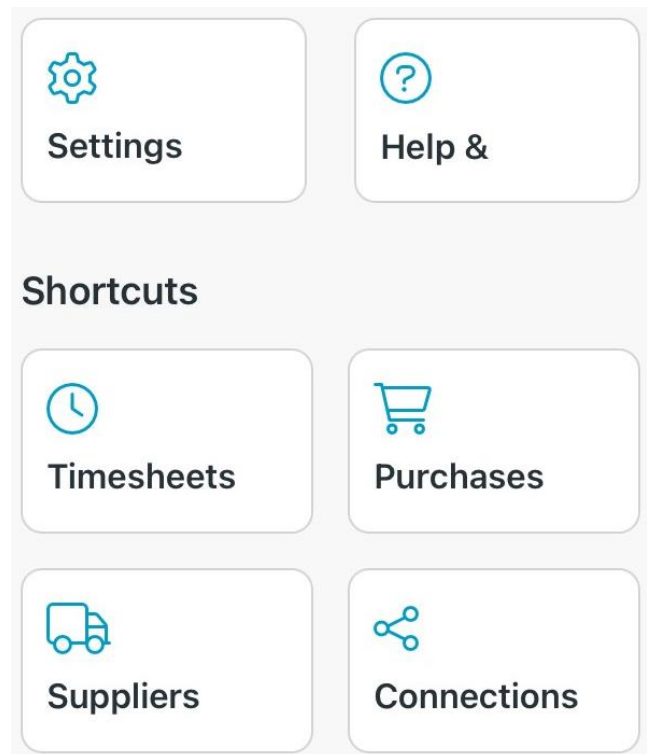
4. Extra Features

The final main section on the Tradify app can be accessed by tapping the More icon at the bottom of the home screen:



Here you will find many more helpful features including:

- lists of suppliers you have used
- lists of purchases you have made
- lists of your important connections
- timesheets for tracking employee hours
- settings for changing your personal account information
- connection to Tradify's support team



Skills for Success

The **Skills for Success** (SFS) are the everyday skills Canadians need for work, learning and life. Several SFS are required for you to be successful using the Tradify app:

- **Numeracy.** Numbers skills are essential when making quotes and writing invoices. Accuracy is essential when dealing with customer costs.
- **Digital.** The Tradify app requires flexing your basic digital skills. You will need digital skills to download and navigate the app.
- **Problem Solving.** Working with different digital systems requires some problem solving. Identify the problem. Then think about it carefully. Then work toward a solution.
- **Creativity and Innovation.** Sometimes applying technology to on the job or apprenticeship problems is a way to show creativity and innovation. Keep learning new tools!

Learn more about the Skills for Success here:

<https://www.canada.ca/en/services/jobs/training/initiatives/skills-success.html>

- Also see the other resources in this series: **Digital Tools for Workplace and Apprenticeship Basic Skills**