SPYDERTECH

Contractor Training a Summary

ABSTRACT

Contractors using SpyderFlow

Version 1.0

Date – 17/12/2025

Status – Published

Next Review Date – 17/03/2025

Owner – SpyderTech Service Desk

Contents

Values Statement

Simplicity and Users first

We will be relentless in removing complexity in our products and our services and look at everything we do from our user's perspective first and foremost.

We shape our own and our customers future

We see we create our own destiny, and we strive to create the future that we want to work and live in for ourselves and the users of our systems

We evaluate new technologies and embrace them

We will always be looking to learn and grow and provide new solutions and opportunities for our users with ever changing technology.

We will improve everything we do collaboratively

We will never be satisfied with what we have achieved or how we have achieved it. We will always look to do better by working directly with our user and our partners.

We embrace and respect the differences in all of us

Our strength as a team is found in the uniqueness that all of us bring and we will respect and honour that.

Our Innovation makes a real difference for our customers and ourselves

We make innovation happen because it creates a positive outcome for our users and ourselves and not just for the sake of innovating.

1. Introduction

- Learning Outcomes
- Accessing SpyderFlow
- Dashboard Familiarisation
- Dashboard and Job WorkFlow

2. Purpose

- Contractor Training in SpyderFlow

3. Scope

This document covers content for Contractors using SpyderFlow to:

- Sign into SpyderFlow
- Dashboard Navigation
- Purchase Orders
- Calendar
- Contacts
- Rates
- Account Admin
- Knowledge Base and Mobile App

4. Detail

Learning Outcomes

- Log into SpyderFlow
- Find and undertake assigned jobs
- Upload insurance and licence documents
- Upload before and after job photos
- Complete a work order
- Claim a job

Accessing SpyderFlow

- Log in via the **web version** first is recommended before using the app on your mobile device. This sets up your SpyderFlow.
- App is then available on both Google Play Store and Apple app store.

How to Sign into SpyderFlow

- Open a web browser and browse to www.spydertech.net.au
- On the SpyderTech website > Click **Solutions Tab**
- Select option: **SpyderFlow Sign in**
- Sign in through your chosen method: Email/Password, Apple, Google, Microsoft.

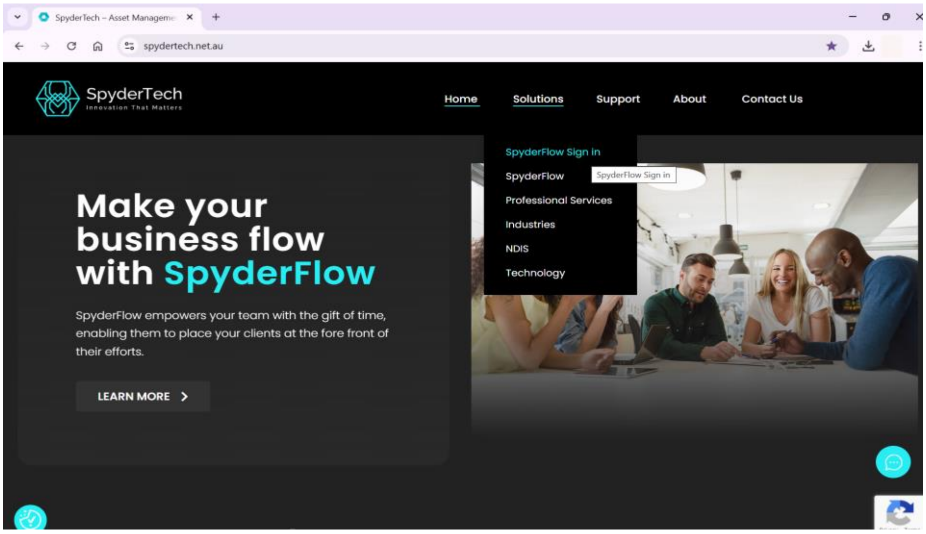


Figure 1: Browse to www.spydertech.net.au > Solutions > SpyderFlow Sign In

Dashboard Familiarisation

- The web dashboard shows alerts, job details, and document upload options.
- Important to understand how jobs appear and how to interact with them.

Main Menu

- Purchase orders
- Invoices
- Calendar
- Contacts
- Rates
- Account Admin
- Knowledge base

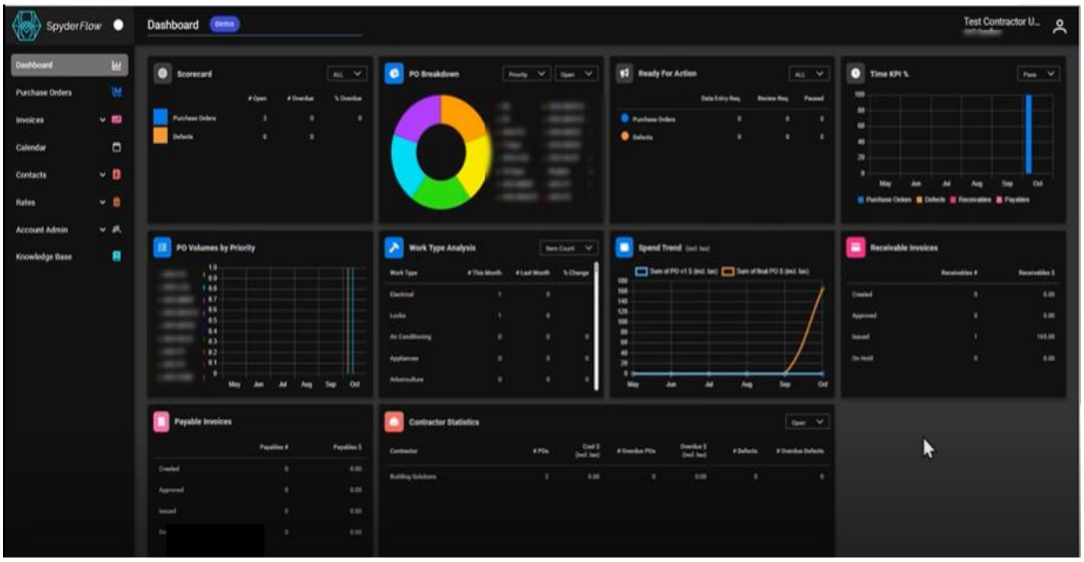
Widgets

- View and/or click to go through links in widgets
- Some widgets also give sort/filter ability

Profile

- Top right (person icon) to go into your Profile, update your details. This is the profile for your user log in to SpyderFlow.

Figure 2: Contractor Dashboard with Main Menu, Widgets and Profile Icon



A Dashboard Overview

SpyderTech
Innovation That Matters

DASHBOARD OVERVIEW

Welcome to Your Dashboard
The Dashboard gives you:
- Job summary
- Compliance alerts
- Quick access to work
- System notifications

Job Status

Allocated	Jobs has been sent to you
Data Entry Required	Updated needed for document of photos
Review Required	Jobs you have asked to be reviewed/updated
Review and Approved	Job is completed and reviewed

Important Alerts
Common Dashboard Alerts:
- Compliance Required (insurance or licence missing)
- Document Expired
- Job Overdue
- Action Required

Job Workflow

- Accept jobs → Upload required documents (e.g. insurance, licences) → Complete tasks → Upload photos/notes → Submit for payment.

SpyderTech
Innovation That Matters

Job Example

Front Door Lock Repair
Job Description:
- Tenant reports **front door lock broken**
- Replace lock for security
- Likely it will be a Rep code that needs to changed to a SOR
- Upload BEFORE and AFTER photos
- Add completion note

Step 1 – Open the Job
Open job:
- ✓ Go to **Purchase Orders**
- ✓ Click assigned job
- ✓ Review **Details** tab
- ✓ Check **Notes tab** for instructions

Step 2 – Upload BEFORE Photo
Attachments → Add → Upload BEFORE photo
- ✓ Title it clearly: "Before – broken lock"

Step 3 – Complete Work
- ✓ Remove damaged lock
- ✓ Install new lock
- ✓ Test functionality
- ✓ Confirm tenant access

Step 4 – Upload AFTER Photo
Attachments → Add → Upload AFTER photo
•Title it clearly: e.g. "After – new lock installed"

Step 5 – Add Job Note if needed
"Replaced damaged lock barrel. Installed new lockset. Job complete and tested."
Or you can add what SOR should be added

Step 6 – Claim Job
Please ensure the time and date of when the job was completed is recorded
Include any updated to SOR you want to list

Support Network

- **Response Coordinators** – Can assist with the process.
- **Online Help** – SpyderFlow Knowledge Base, Contractor Manual
- **IT Service Desk** – Please call or email Service Desk as per your documentation
- **Contract Managers, BTO's** – for advice/assistance, escalations.

5. Logging In to SpyderFlow

When you sign up to SpyderFlow you will choose one of the options below:

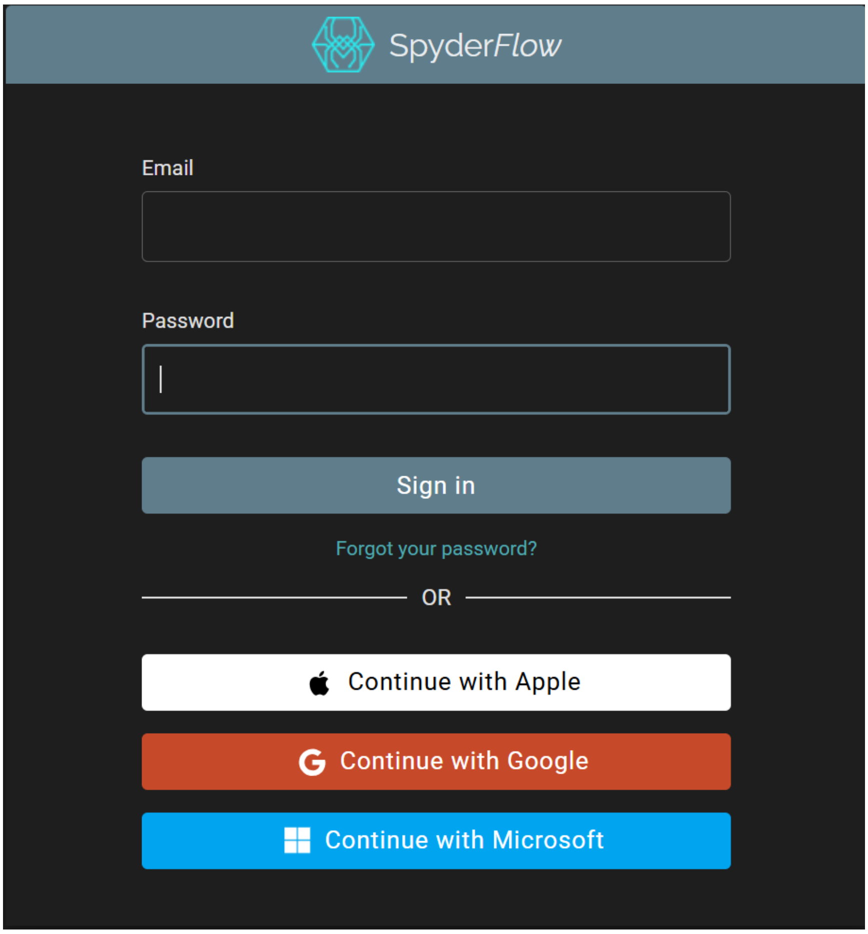
- Email/Password
- Apple
- Google
- Microsoft

It is important to remember that the way you choose to sign up is the way you will continue.

Forgot your Password

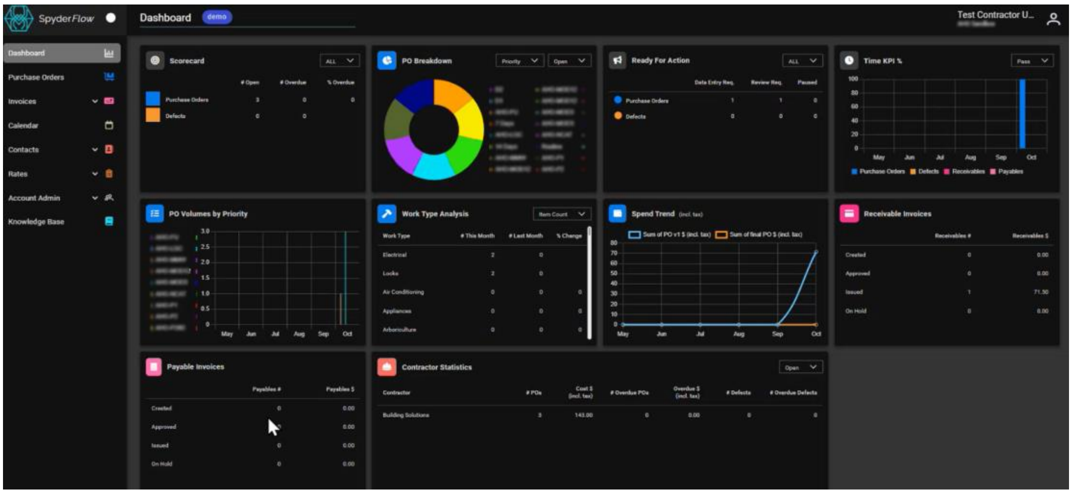
If you signed up with email/password and forgotten your password, please click the link below 'sign in' – **Forgot your password?**

- Link to reset your password will be sent to your email.



6. The Dashboard

When you log into your SpyderFlow you will go by default into the Dashboard. This will give you information about jobs, what you need to do, receivable invoices (what we will pay you) and a sense of licences, insurances you need to manage.

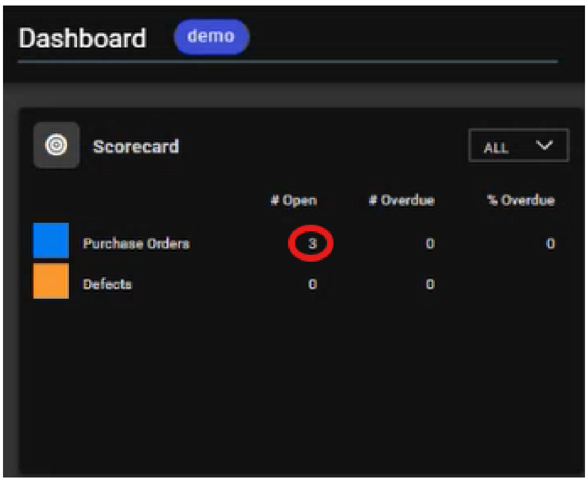


Dashboard Features

Main Menu (Navigation Panel)

- Located on the left-hand side for quick access to different system areas.
- Easy navigation to Purchase Orders, Calendar, Contact information, Invoices and the SpyderFlow Knowledge Base.

Note! If you are on the web version of SpyderFlow then the easiest way to get to your purchase orders is through **ScoreCard widget > Purchase Orders > Open.** Click and go direct to the open orders.



Widgets (Dashboard)

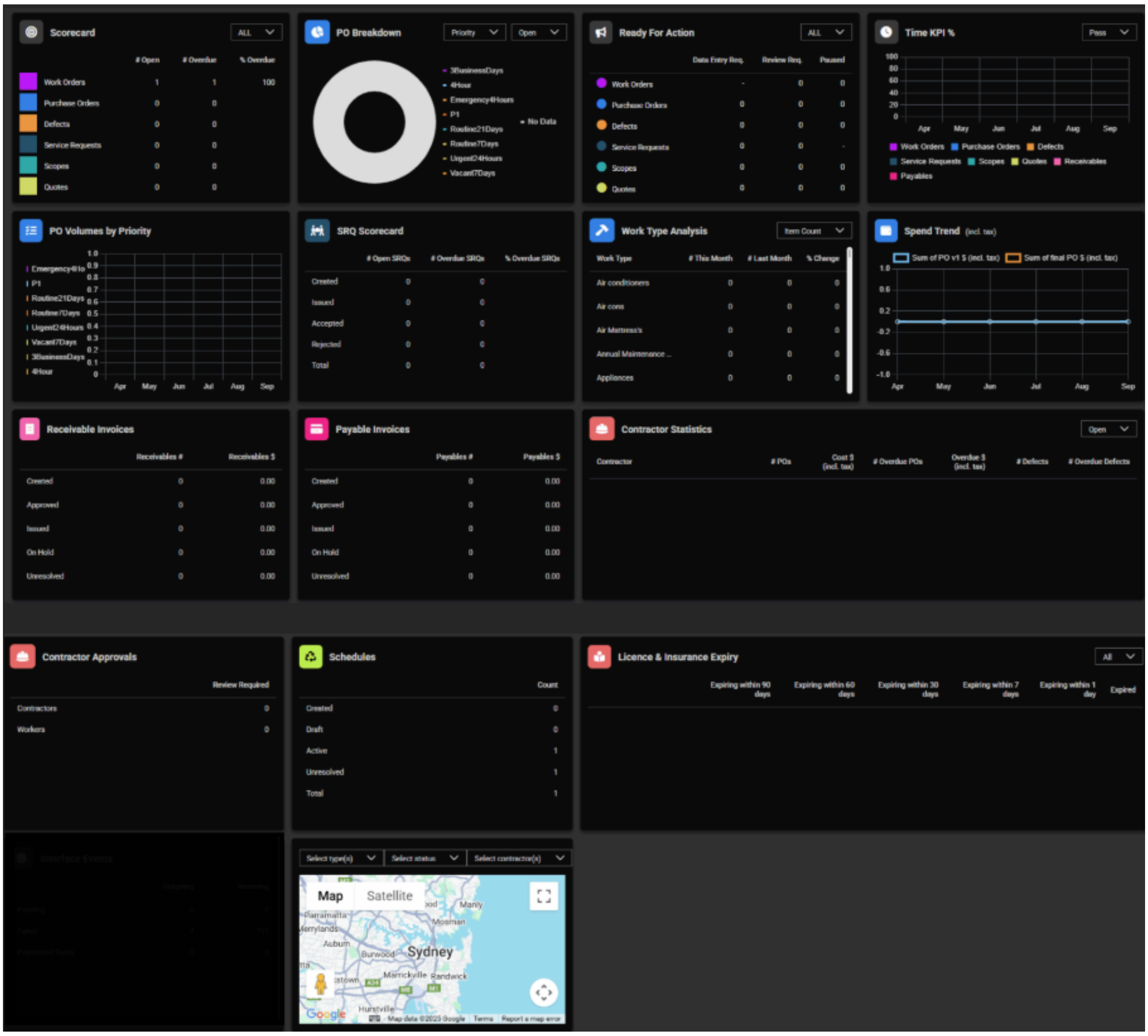
If you are working in the web browser version of SpyderFlow the easiest way to get to jobs may be through widgets.

Some widgets may include but not limited to:

- **Scorecard**: Shows all open/overdue orders, defects.
    - Click the number in each column of Scorecard to go direct to Purchase Orders.
- **Data Entry Required**: Alerts for missing or incomplete job data.
- **Review Required**: Submitted jobs pending review/payment.
- **Receivable Invoices**: View scheduled payments.
- **Licence & Insurance Expiry**: Alerts for upcoming expirations.
- **Map**: See where your jobs are located on the map to plan your travel if work across multiple areas

The widgets you see are relevant to your permissions and work inside SpyderFlow.

You may also have additional to what is listed above.



7. Purchase Orders

The jobs you have in the system to work with and understand what you need to do.

When you receive a job: you will be notified by mobile, email, if urgent a Response Co-ordinator may also contact you.

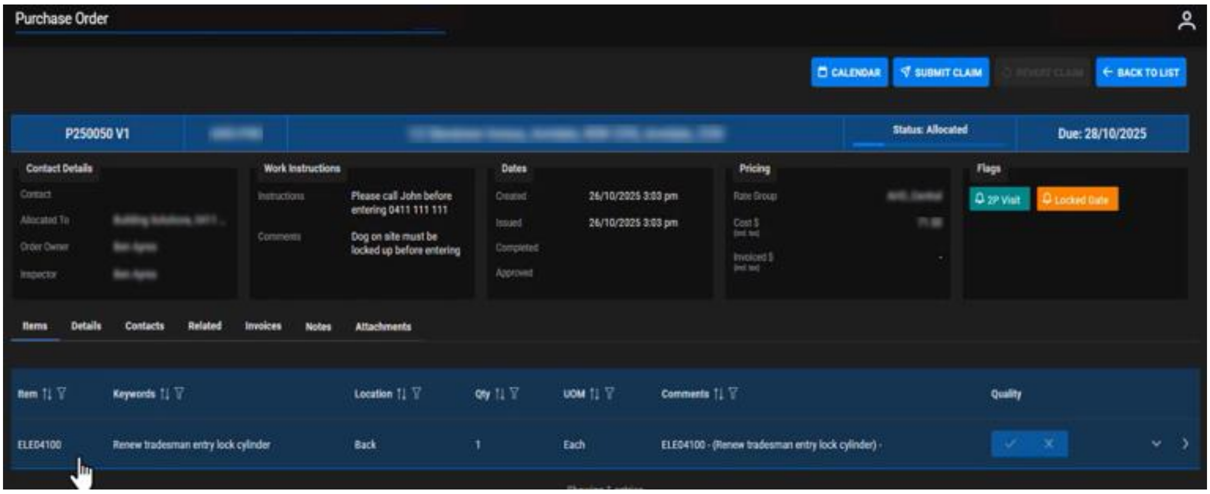
Working a Purchase Order

Click into a list of Purchase Orders from either a widget on the Dashboard or by the Main Menu > Purchase Orders).

- Open the Purchase Order view and check the details.
- Contact information, Work Instructions, Dates, Pricing and Flags are along the top of the order.
- **Flags are quite important:** these give you information to stay safe and to do the job well. Can include 2P (2-person visit), Locked Gate, Dog on Premise as examples. Flags can also alert you in the Tenant may be hard of Hearing or other issues as well.

Purchase Order Tabs

- Under Contact Details, Work Instructions there are Purchase Order Tabs as below:
  - **Items:** We aim to send jobs as SOR code items but in some cases, this may display a REP Code.
    - To expand the item for more information, navigate to right side and click the arrows to expand down or expand fully for greater detail.
  - **Details:** Gives all the information about the job
  - **Contacts:** Contact information e.g. could be the tenant contact details.
  - **Related**: Related areas for example could be a business contact, invoices etc.
  - **Invoices:** Job relevant invoices
  - **Notes:** Add Notes about the job
  - **Attachments:** Upload photos and other attachments



Further information

Along the top of the Purchase Order will be the PO number, code, address, status. Due Date.

Above to the right side is link to your Calendar, Submit Claim/Revert Claim, Back to List buttons.

Job Status

- **Allocated**: Job assigned and ready to start.
- **Data Entry Required**: Update needed before completion. Usually comes with information of what is needed.
- **Review Required**: Job submitted, awaiting approval/payment.

Job Details

- Includes **contact info**, **work instructions**, and **flags** (e.g. safety alerts like dogs or locked gates).
- **Scheduler Rate Items**: Standard jobs with your predefined rates.
- **Rep Codes**: Used when job details are unclear—requires clarification before claiming.

Safety & Support

- Flags help identify special conditions (e.g. 2-person visits).
- Contact details may include carers or personnel for safety coordination.

Summary on Rep codes vs SOR codes

Rep Codes vs SOR Codes in SpyderFlow

- **SOR (Schedule of Rates) Codes**:
  These are preferred and used when the exact work is known. They make quoting and payment straightforward.
- **Rep (Repair) Codes**:
  Used when the job is **reactive** and the exact issue can't be determined from tenant or other conversations.
  Example: "Toilet leaking" might need further inspection to identify the exact fix.

What You Should Do

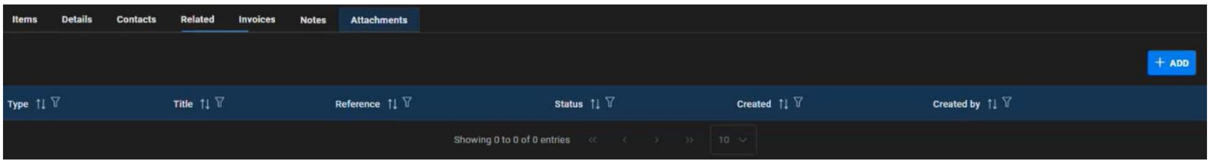
- **If you receive a Rep code**:
    - Add **clear notes** describing the issue.
    - Upload **before and after photos** (date and timestamped with Address location).
    - Request an SOR code change via the **notes section**.
- **Changing Rep to SOR**:
    - Currently done via **notes and attachments**.
    - A future update will allow direct code changes (e.g. "Add this code / Remove this code").

Uploading Attachments (WEB)

Jobs can require uploading attachments. For example, as you complete the work you can be required to take before and after photos, upload to the order.

To do this:

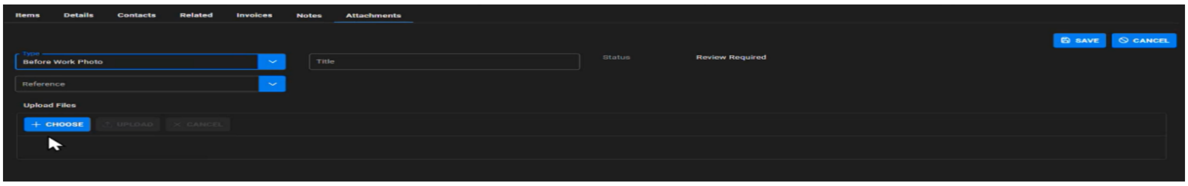
- Go to the **Purchase Order > Attachments tab > Click +ADD**



- Choose attachment **Type** (e.g. "Before Work Photo").
- Click **+Choose** (navigate to your saved photo on your computer and select photo to be uploaded)
- Upload the file, name it, and **Save**.
- When complete **Submit Claim** (main screen of Purchase Order top right side)

Note! Currently, you will need to use another application to add date/time/location to the photos.

This feature is not yet available to take picture direct from camera with date/time stamp on photo.



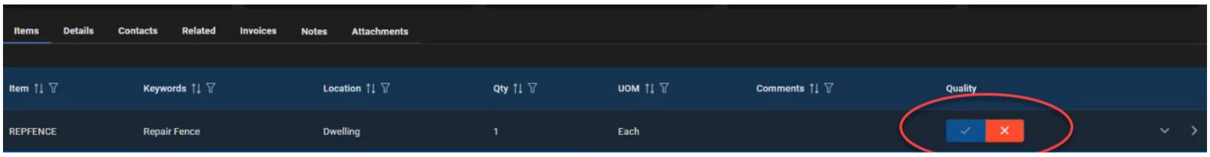
Defects

- At times when you get jobs coming in you may see an item with a red cross. This means there is a defect and there is something that needs to be corrected.
- Click to expand with arrow (right side of the red cross) and the information will be displayed.
- **An example** could be that the incorrect photos have been uploaded.

For this case upload correct photos, add note if required.

This will be reviewed and corrected.

Any issues, please contact Response Co-ordinator to see if there is anything else required on your end to be completed.



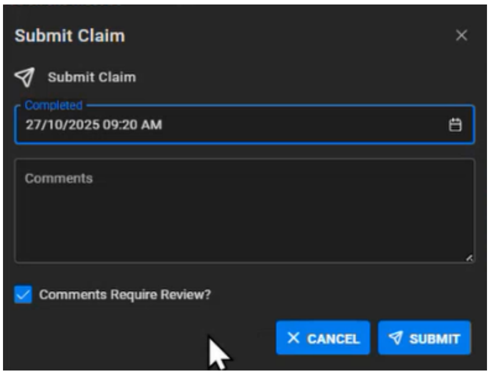
8. Claiming Work in SpyderFlow

Submit Claim

Use the **"Submit Claim"** button on the Purchase order.

Claim Time = Work Completion Time

- Note the time you enter the claim it is the time you completed the job. Not the time submitted the claim.
- Add Comments if need and relevant to the purchase order claim



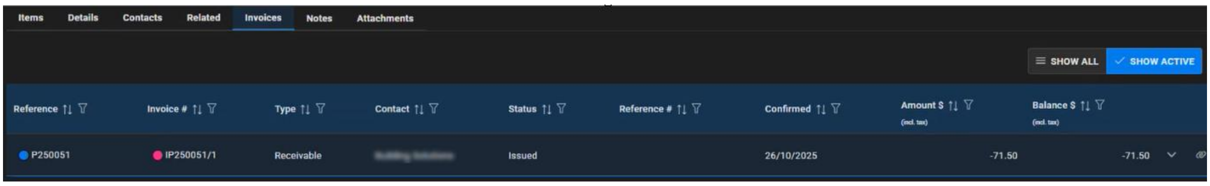
Order submitted > Response Co-Ordinators will review.

Claim is Submitted to be Reviewed

Once you have submitted the claim this will be reviewed, when complete the **Purchase Order status changes to Reviewed & Approved.**

- An invoice will then be added to your system, and you will see invoices you will be paid as schedule to be paid items.
- You do not need to invoice us this will come through when you submit your claim and it is successfully reviewed and approved.

Submit Claim is important as it starts the process of submitting the work and getting paid.



Claim Statuses

- **Review Required**: Submitted, awaiting approval.
- **Approved**: Green tick appears; invoice is generated.
- **Issued**: Invoice pushed to accounting, pending payment.

📎 Supporting Documentation

- Upload **photos**, **notes**, and **attachments** to support your claim.
- Timestamped and location on **before/after photos** help validate the work.

Revert Claim

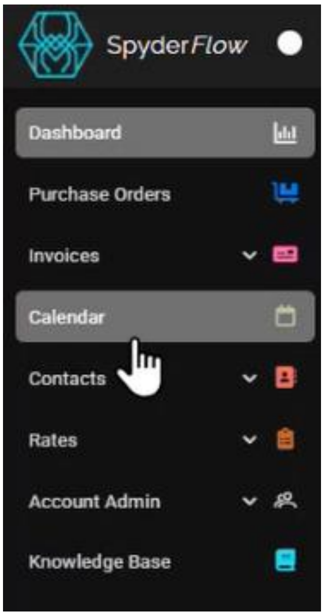
If claim is incorrect click Revert Claim Button, enter the information and claim will be reverted.

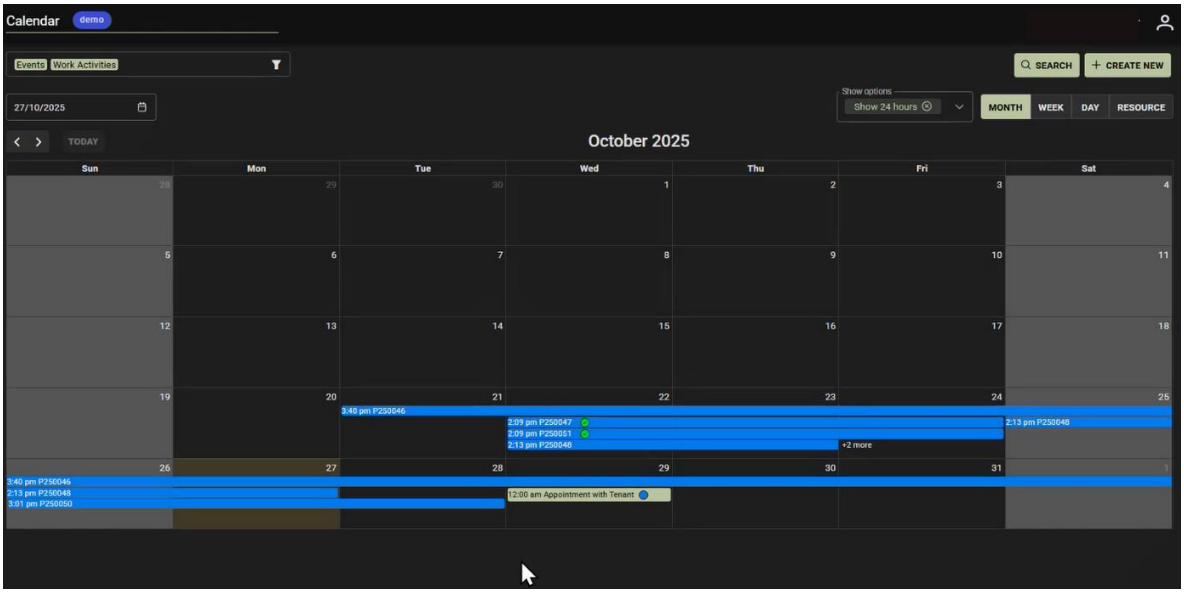
- Follow the instructions like submitting a claim but to revert the claim
- Add notes as required and Save.
- Correct what is missing, or incorrect
- Resubmit claim when complete.

9. Calendar

The calendar shows when the work activities need to be completed.

- Shows **open purchase orders** and their deadlines. Along with coloured bar timeline. If you click on the blue bar and be taken to the job (Purchase Order) itself.
- **Appointments** can be added by you or SpyderFlow staff. Tenant appointment can appear in your calendar when you or staff add for you.
- Shared calendar helps coordinate access and reminders with tenants.

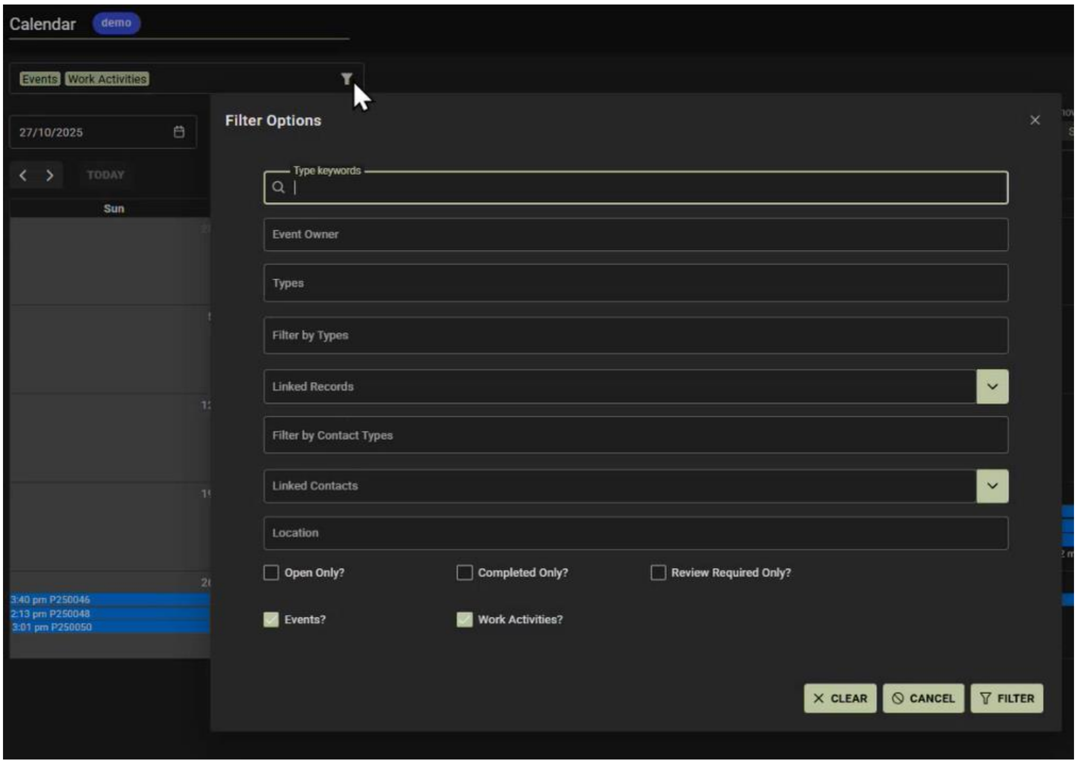




Calendar Filter Options

There are multiple ways to search for, link, filter orders.

Look up Calendar on the knowledge base for further information or click around to see what your calendar can do with the Filter options.



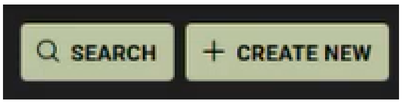
View Options

Can be by Month, Week, Day or Resource View

Show options by ticking check boxes: Events, Work Activities, Show Weekends, Show 24 Hours

Also

- **Search Button**
- **+Create New**



Search and Create New events on your calendar.

10. Contacts

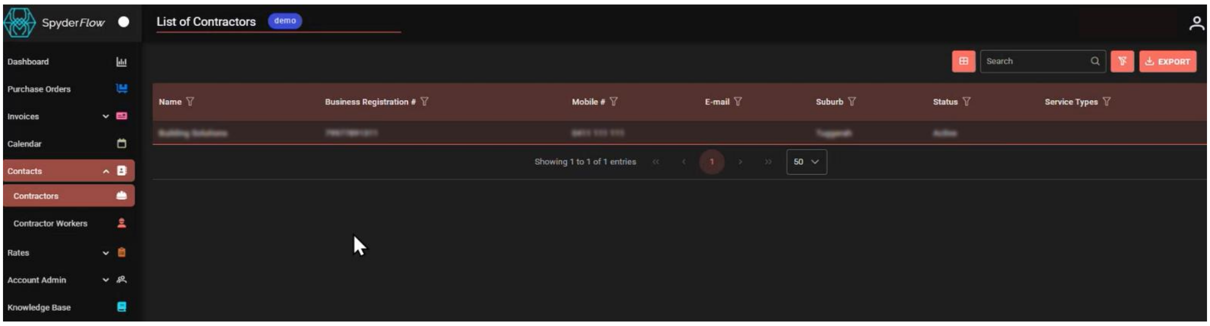
On the contacts page you have your Contractors and Contractor Workers

Contractors > List Of Contractors > Your Contractor record > select to view

Tabs inside your contractor record include information about your business:

- **Details –** Please do not change availability filters on this tab. Or it may affect orders allocated to your business.
- **Contacts** – Can add and edit
- **Insurances** - Can add and edit
- **Licences** - Can add and edit
- **Communications** – check with us if need to change
- **Workers** - Can add more workers. Notice you will all have a worker added by default. This is your main company worker for your business.
- **Notes** - Can add and edit
- **Attachments** - Can add and edit

This is the information you shared with us. You can view and manage your own record to update as needed to share with us.



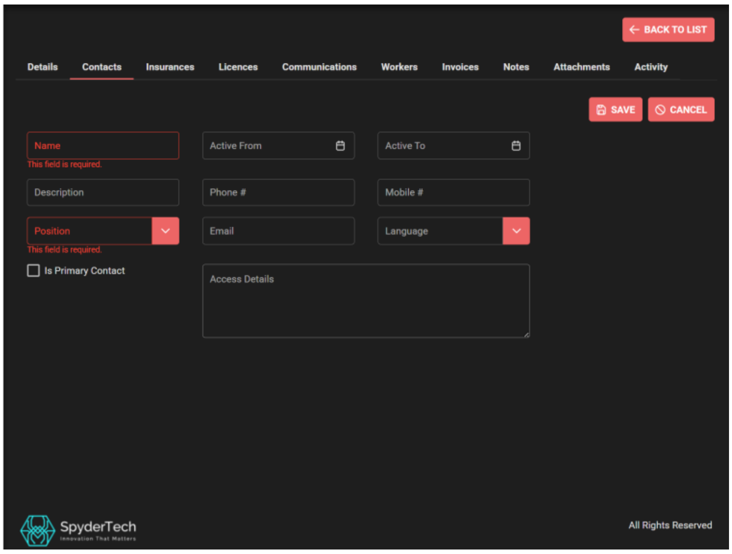
Add a Contact

If you would like to add a contact, you can edit your own record

Click the **Contacts tab > select +Actions > Amend.** Your record will then go into a draft status.

Then you can add more contacts through the **+ADD** button

- Mandatory fields are highlighted red (Name, Position), other fields are optional.
- **Click Save** when complete



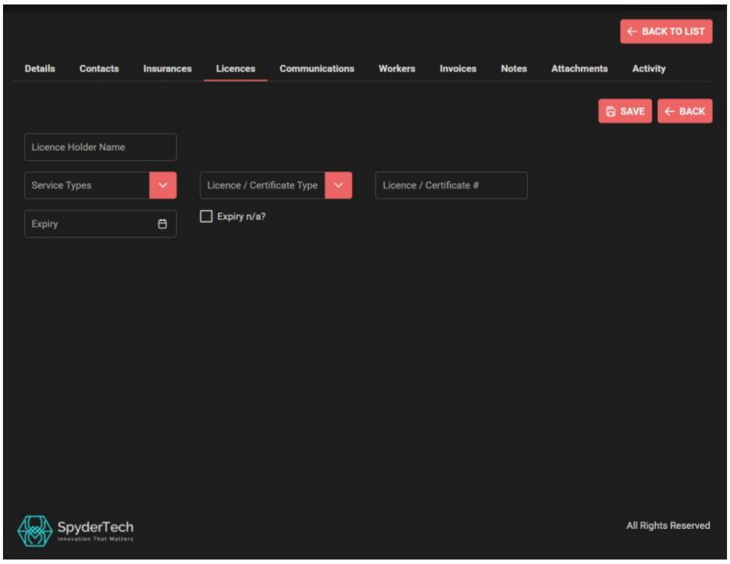
Add Licences and Insurances

Click each Tab as required. Expand rows of information already added if to edit the details.

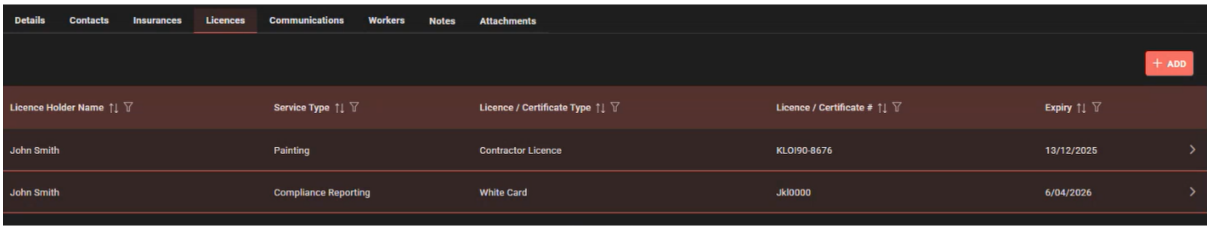
To Edit click the arrows to expand at end of each row, edit the information and Save.

Or Click **+ADD** to add further Licences or insurances, again save when complete.

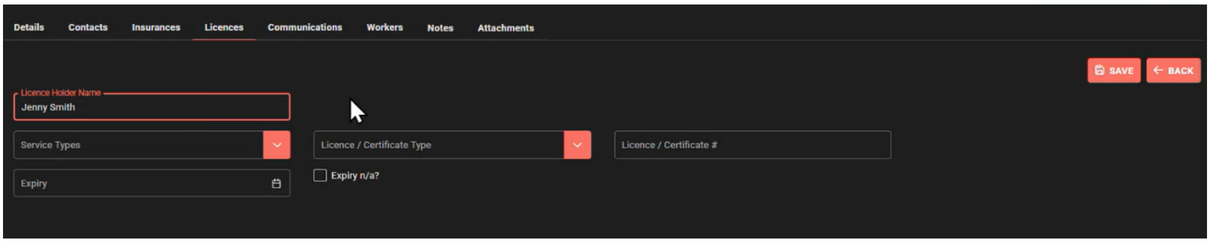
Upload photos of insurances or licences through the attachments tab



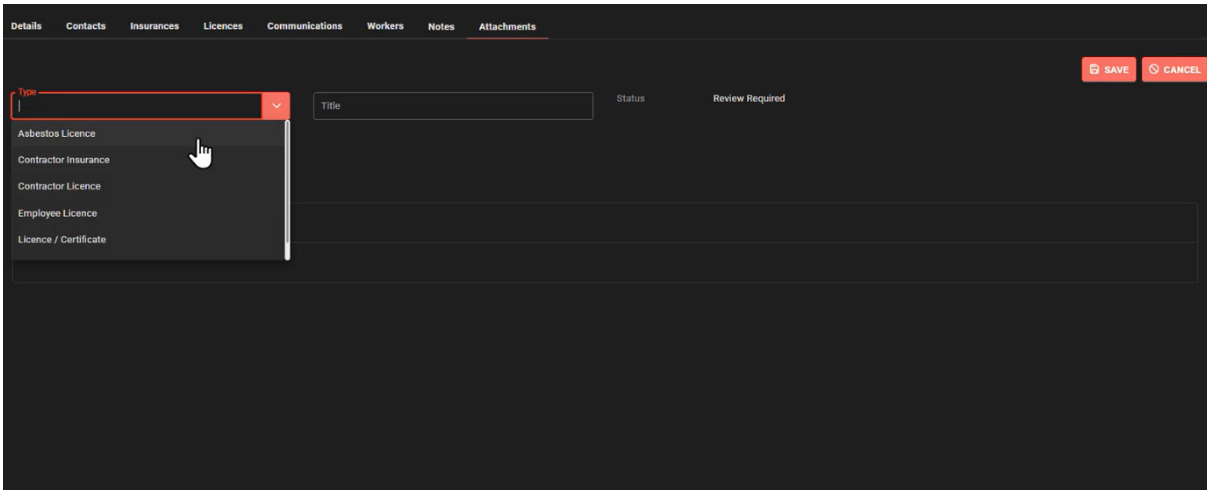
View your licences



Add new licences



Attachments – Add details and photos of your licences, insurances or other relevant information. Upload from your device



Also add in your **Contractor Workers** through tab in Contractor record or from Left side Main menu.

Note: Contractor Workers the information can be added to your SpyderFlow, but we cannot allocate separate user log ins at this time.

It is more for your business to be able to add Worker information to your SpyderFlow.

To Summarise Contractor Profile area

1. Contact Details

- View and edit your business contact info.
- Use **“Amend”** to switch to draft mode and update records.

2. Licences & Insurance

- Add or update licences (e.g. contractor, asbestos).
- Assign them to individuals or keep them at the contractor level.
- Upload documents with expiry dates—system will alert you when they’re close to expiring.

3. Communication Settings

- Set different emails for quotes, scopes, invoices, etc.
- Helps route notifications to the right team members.

4. Workers

- Add workers and assign licences to them individually.
- Useful for tracking specialist qualifications.
- *Currently you cannot assign work directly to workers, however that will be available in future releases.*

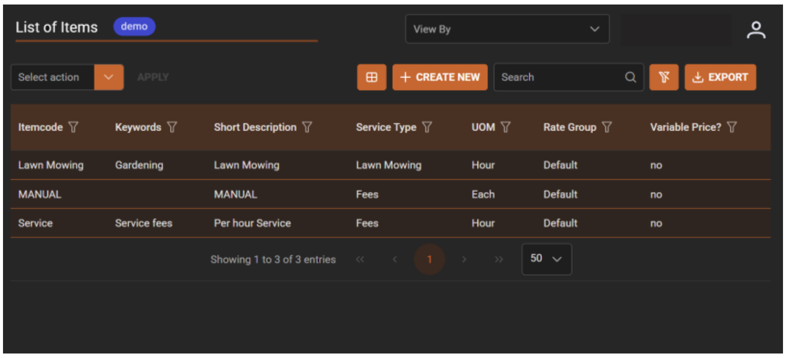
5. Notes & Attachments

- Add notes for internal or shared communication.
- Upload documents (e.g. WWCC, insurance) with virus scanning for safety.

11. Rates

The items are subject to your business, service type and area

- View and filter your agreed rates by service type and location.
- Helps you confirm pricing before claiming.



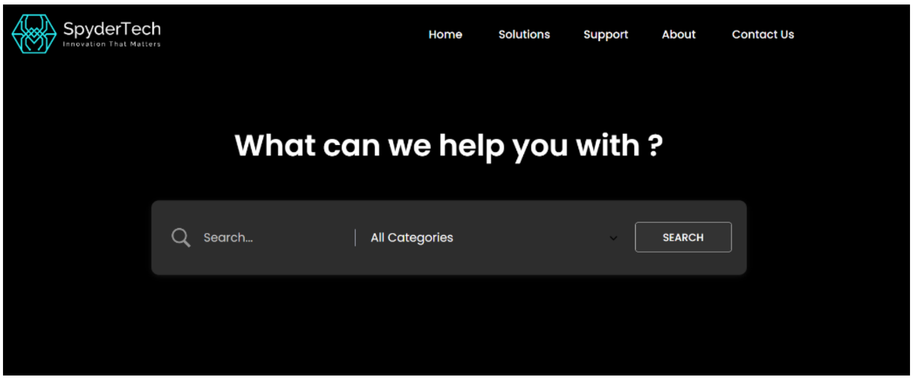
12. Account Admin

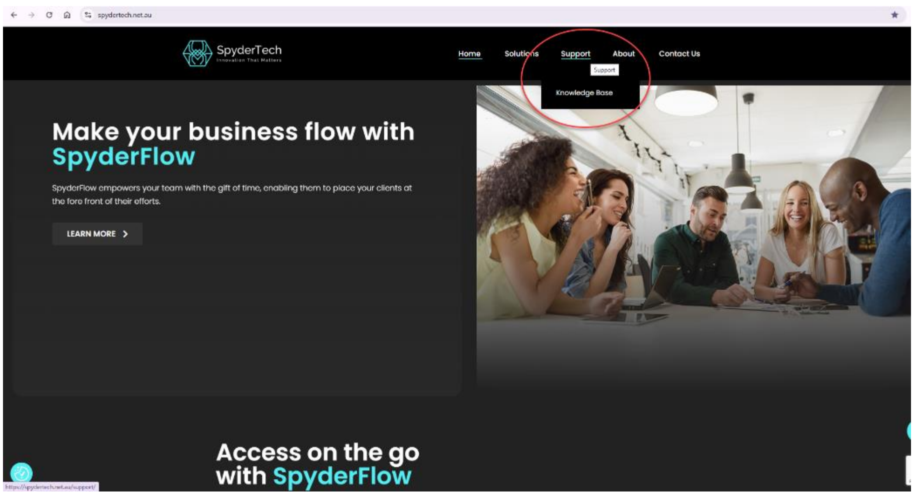
- Located on your Main Menu
- Click to drop down to see who your users are and manage access.
- Should be only access by your Administrator for Company

13. Knowledge Base

- Click the **Knowledge Base** link anytime for help articles and manuals.
- Located on your Main Menu
- Will open into a new web browser window for ease of use separate to your SpyderFlow
- Can also be accessed by web search www.spydertech.net.au, Click Support, Click Knowledge Base on website.

Note! If you Type Contractor Manual or Contractor Summary into Search: this will link you to our latest online versions of training materials.



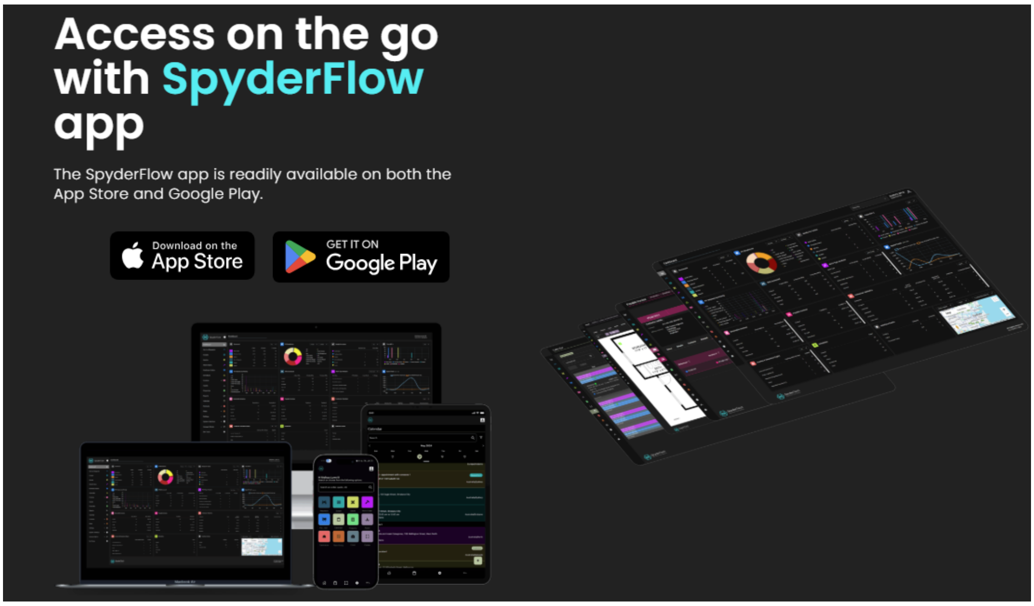


14. SpyderFlow Mobile App

Used more as an on-the-go version of SpyderFlow.

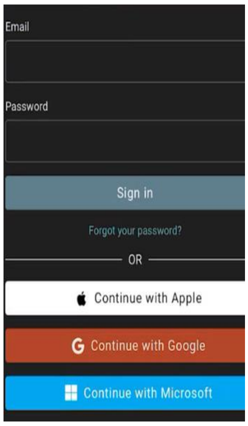
To download the SpyderFlow App go to:

- **App Store – Apple devices** (iPhones, iPads). Search for 'SpyderFlow' and Install to your device.
- **Play Store - Android/Samsung** (phones and tablets). Search for 'SpyderFlow' and Install to your device.



Features of the app

- Can be voice activated for ease or text usage
- View Purchase Orders
- Upload photos, add Notes
- View and use Calendar – see Purchase Orders, Appointments



On the Mobile App > Log in the same way as you would on the Web version.

- If use Email on web use also on Mobile.
- If use Google, Apple, Microsoft then log in same way etc

Note that the mobile app has less functionality than the web version, The mobile app is designed for on the go usage, and the web is for managing your SpyderFlow.

Mobile App Main Screen

Main icons on screen are

- Purchase Orders
- Calendar
- Contractor
- Rate Group

Search bar sits above icons

Your user profile is top right.

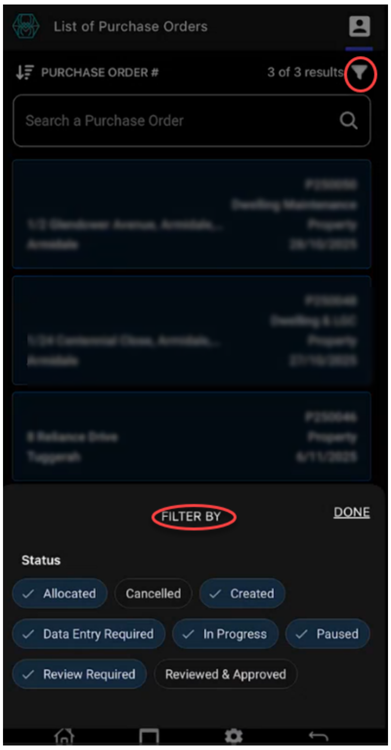
Quick links at bottom of Screen include:

- Home
- Calendar
- Settings
- Back

Purchase Orders on the mobile app

Click to view your jobs to do through List of Purchase Orders (from Purchase Order button on main screen)

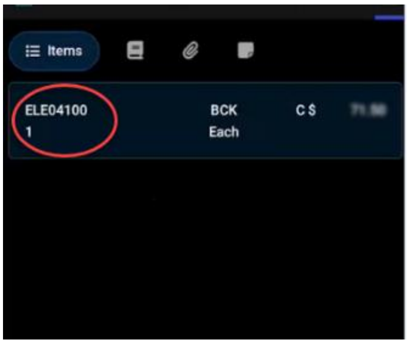
- If you don't see all your purchase orders, then click the filter (top right) near results on screen. This will bring up a Filter by Status that you can adjust your view.
- Click the unselected in filter to see more of your purchase orders (if required).



Inside a Purchase Order

Click to select a purchase order and it will open into a landing page type view of:

- Address across top
- Items, details, Attachments and Notes tabs
- Items (SORs or REP codes) shown in Item tab view

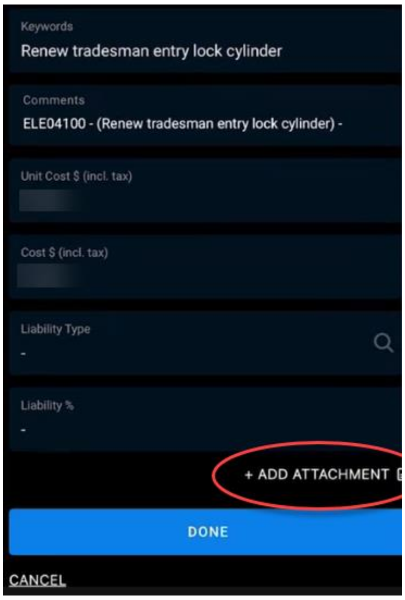


To add a Photo into the Item

Items tab > Select SOR or Rep item to open. This opens into the item details

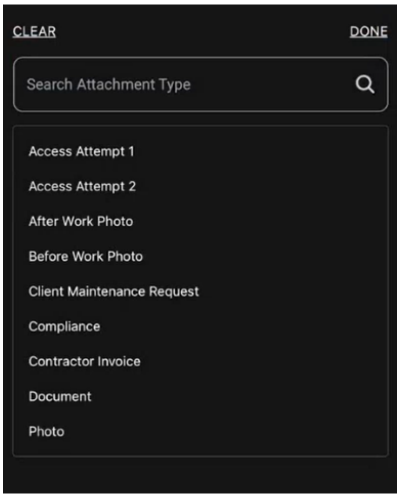
Scroll to bottom of the purchase order item.

- Click **+Add Attachment**



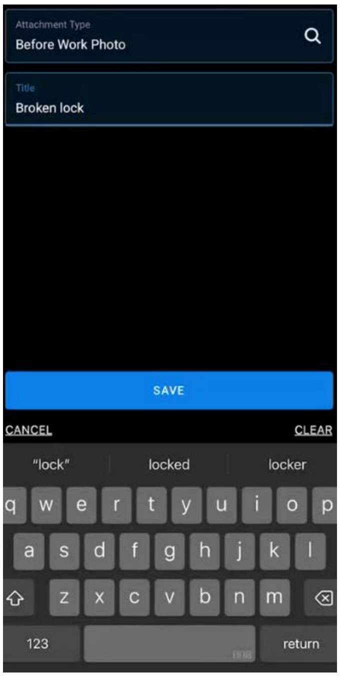
Search Attachment Type

- Search the type of attachment you want to add
- For this example, we will choose Before Work Photo.



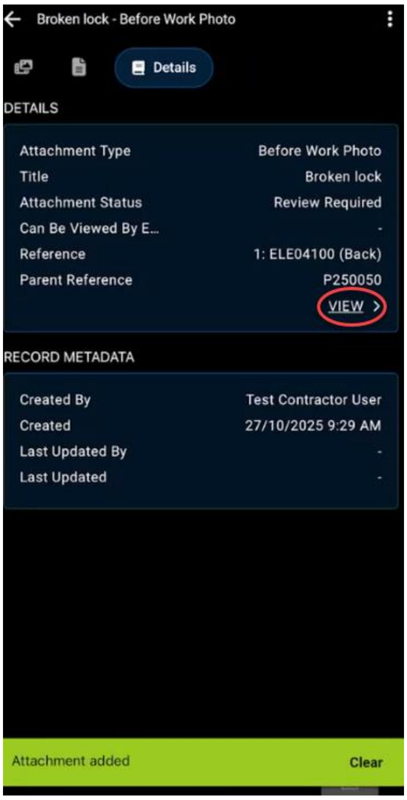
Add a Title for your Attachment.

Type or speak for text



Attachment is added and picked up you are doing Before Work Photo items for that item.

Click View



Add Photos

Click **+** to add photos, This will open into a new window.
Choices will be:

- Take a Photo
- Choose a Photo
- Choose a file

Choose a Photo to upload from your device.

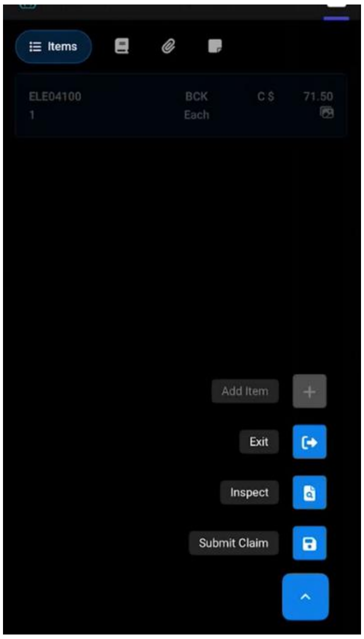
Repeat the process to add more attachments to the item and name, accordingly, choose your photos, upload until complete.

Upload Multiple Photos

- Choose from your gallery or take new photos. At the moment you will need to use a third-party app to time/date stamp your photos before upload.
- Note! You can upload several photos at once under the same attachment entry.
- New attachments in the SOR or Rep Item: Repeat process as above.
- **For example:** After Work Photo. Repeat the process for completed work photos.

Once attachments are complete and job is finished > Submit Claim

The Submit Claim is accessed by clicking arrow at bottom of screen inside the purchase order see below



🕒 **Important**:

When submitting a claim, make sure the **claim time reflects when the work was actually completed**, not when the claim is submitted.

- On the next window Select time/Date work was completed and add comments, tick 'Comments Require Review?' so we know the work is done and we can review.
- Then click **Save & Done**

To check the status has changed on Purchase Order

- Log into the web version of SpyderFlow
- Go to Purchase Orders and the status will now be **Data Entry Required.**
- Response Co-Ordinators will check the order is completed
- Once order is approved, you will see an invoice come through to the purchase order.
- The payment process can continue like earlier described when we were looking at the web version.

Further Questions:

- Please browse to www.spydertech.net.au > Support > Knowledge Base
- Click on Knowledge Base in your Main Menu of SpyderFlow
- Reach out to your Support Network

Thank you for taking the time to learn about SpyderFlow.