SpyderFlow – How to Guide for Mobile App - 2025

Service Desk Email: servicedesk@spydertech.net.au

Service Desk Phone: 02 4357 9992

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Mobile App | About

Overview

If you perform work on-site and/or manage assets.
Available on:

- Android (Google Play Store)
- iOS (Apple App Store)

Why SpyderFlow?

SpyderFlow makes asset and workflow management easy and convenient when your work takes you mobile.

- Not just for buildings — manage any type of asset including:
  - Parks
  - Power poles
  - Wind turbines
  - Hotel rooms
  - Equipment
  - Vehicles
  - People
  - …or any other asset type.
- Store all your information in one place.
- Manage workflows without juggling multiple apps, scribbled notes, or paper trails.
- Simple, flexible processes that are intuitive — minimal training required.

What SpyderFlow Helps You Do

- Asset Management
- Quote Requests
- Inspections
- Work Orders
- Defect Management
- Cyclical Works
- Photo Storage against properties or jobs
- Notes against properties or jobs
- Activity Log for amendments or variations
- Scoping Works
- Scheduling Resources

Sign In with Single Sign-On (Microsoft SSO)

Overview

SpyderFlow supports Single Sign-On (SSO) options for Microsoft accounts.

This method of sign in allows you as a user to authenticate with a single set of credentials across multiple applications. You may already use this with Microsoft Outlook, Teams and Office software.

By using this method with SpyderFlow, not only can a user save time but also strengthen security by using organisation email/passwords set on their computer.

How to Sign In Using SSO:

When signing up with Microsoft SSO:

1. You will receive an email invitation to sign up to SpyderFlow. Click Sign up on the email.
2. You are directed to the SpyderFlow Sign up page
3. Choose Sign up with Microsoft – Do not enter email/password in fields above. Even though your email address may be prefilled. We are not using the email/password sign up option!
4. A Microsoft – Pick an Account window may show (if you are already signed into your computer with SSO) – Click your organisation email address and follow prompts
5. Enter Password. This may be remembered on your device
6. Click Create.
7. Once verified, SpyderFlow will sign you in and open the Dashboard view.

💡 ***Tip! If prompted for permissions, click Allow to grant access for authentication.***

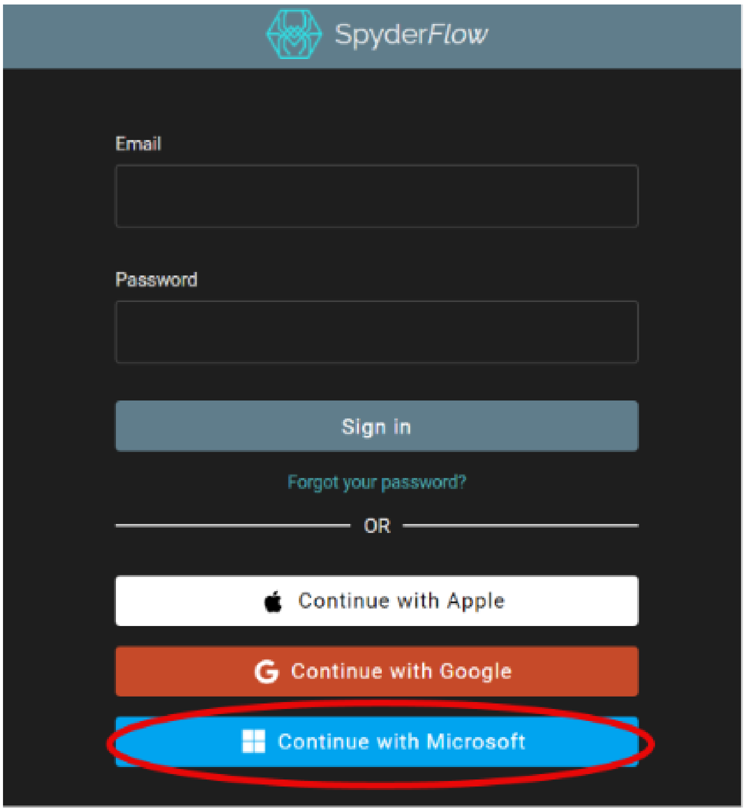
Future Sign-In with Your Microsoft Account

- After signing up with Microsoft SSO, always select Continue with Microsoft on the SpyderFlow login screen.
- Mobile App Access:
  - If you haven't installed the SpyderFlow app, download it from:
    - App Store (for iOS)
    - Google Play (for Android)
  - On the app login screen, tap Continue with Microsoft to sign in.

Cannot Sign in with Microsoft SSO

⚠️ ***Important!***

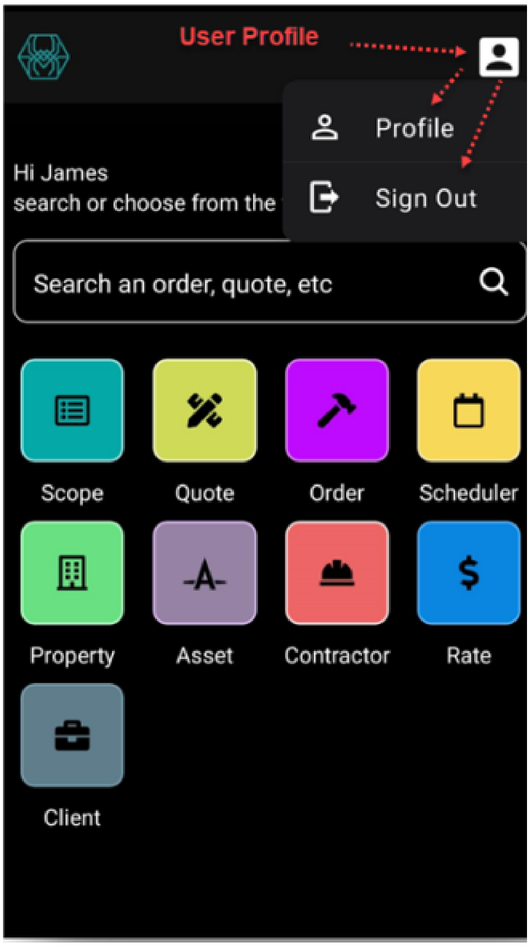
If you did not choose to sign up with Microsoft SSO during your first sign-up, you cannot use SSO for future logins. Contact Service Desk for assistance by phone, email or portal.



Mobile App | User Profile

Overview

The User Profile icon is located at the top-right corner of the screen.
From here, you can view or modify your profile details and sign out of SpyderFlow.



My Profile

- Tap Profile to open My Profile settings.
- By default, the Details tab is displayed, showing:
    - Username
    - Status
    - Display Name
    - Phone #
    - Mobile #

Modify Details

- Tap the pencil icon to edit any field.

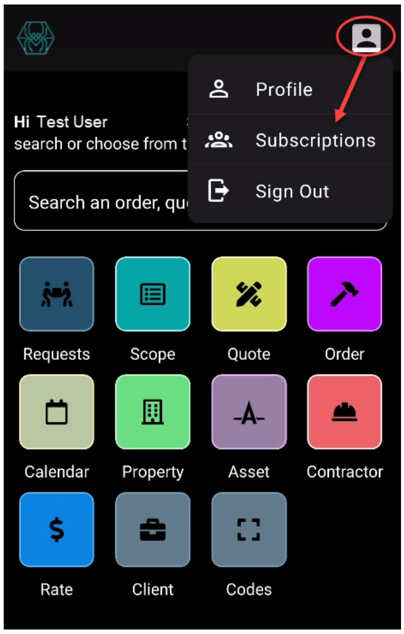
Info Tab

- Displays profile history:
    - When the profile was created
    - Who created it
    - When it was last updatedSign Out

- Tap **Sign Out** to securely log out of SpyderFlow.

Mobile App | Change Subscriber

Overview

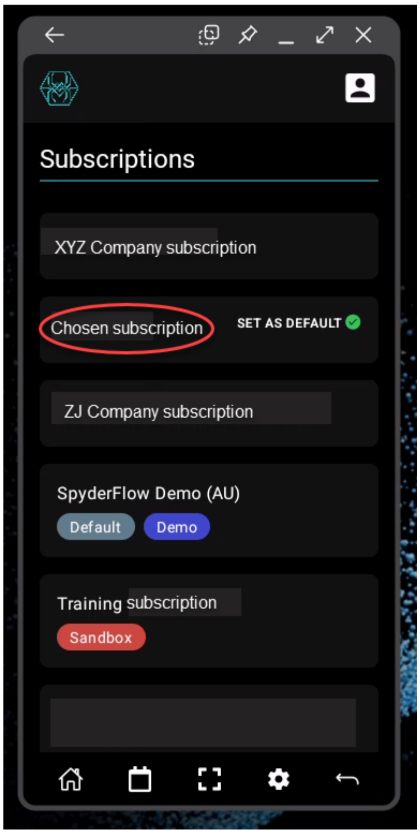


The **Change Subscriber** function allows users with access to multiple subscriptions to switch between them easily.

- Available on both Web and Mobile.
- Eliminates the need to sign out and back in when changing subscriptions.

How to Change Subscription on Mobile

1. Tap Profile (top-right on Dashboard screen).
2. Select Subscriptions.
   - The Subscriptions page will list all subscriptions linked to your login.
3. Tap the subscription you want to switch to.
   - A green tick will appear next to the selected subscription.
   - Option: Set as Default.
4. A green validation message will appear at the bottom of the screen confirming the subscription change.
5. Tap the Home icon (bottom-left).
   - The Dashboard will reload in the selected subscription account.

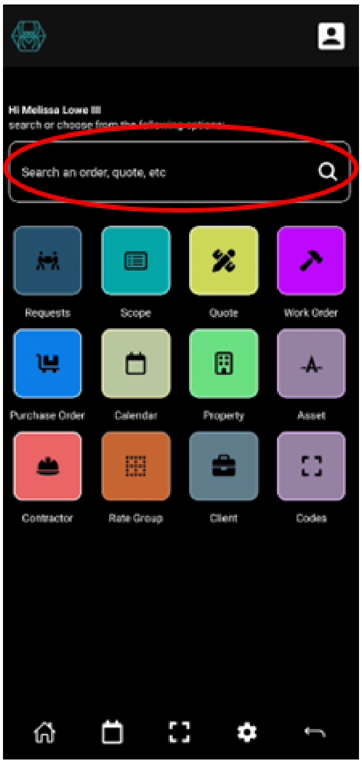


Note

- Default, Demo, Sandbox icons indicate different subscription types.
- If none of these icons are visible, your account may only have production subscriptions (no demo or training subscriptions).
- When a subscription is set as default, it becomes the subscription the user automatically logs into until changed.

Mobile App | Overall Search

Overview



The Overall Search feature allows you to quickly find records from the Home Screen (Mobile Dashboard).

- Use keywords or partial combinations of letters/numbers.
- Can search across multiple fields, including:
    - Addresses
    - Order numbers
    - Asset names
    - Categories
    - And more

Search Results

- Results are colour-coded to match icon categories on the Dashboard:
    - Example: Green = Property, Purple = Order
- Handy hints:
    - Keep your search simple, like asking a question.
    - More search criteria → narrower results.
    - Fewer criteria → broader results.

Examples

- **Address:**
    - type the word or starting letter.
- **Work Order:**
    - type the order number (e.g., starting with "W").
- **Category:**
    - type the category name, e.g., "Property," "Asset," "Land," "Vehicle," etc.

Asset Management – Scope, Quote, Works, Inspect

If you perform work on-site and/or manage assets, is built to support your workflows, wherever you are.

✅ Available on Android (Play Store) and iOS (App Store)

Why SpyderFlow?
Key Benefits

- All-in-one system
  - Manage assets and jobs with ease.
- Simple & flexible workflows
  - Intuitive design means no steep learning curve.
- Mobile convenience
  - Designed for teams on the move.

What SpyderFlow Can Do

- Asset management
- Quote requests
- Inspections
- Work orders
- Defect management
- Cyclical works
- Photo storage (linked to properties or jobs)
- Notes (linked to properties or jobs)
- Activity logs (track changes, variations, amendments)
- Scoping works
- Scheduling resources

SpyderFlow – Mobile App

SpyderFlow App on Android

To install the app on an **Android device**:

1. Open the **Google Play Store**.
2. In the search bar, type: **"SpyderFlow"**.
3. Select the app listed as: **SpyderFlow – SpyderTech**.
4. Tap the **"Install"** button.
5. Once installation is complete, tap **"Open"** to launch the app.
6. **Choose your region**:
    - *Australia*
7. **Sign in** using one of the following methods (based on your organisation's setup):
    - Google Account

GET IT ON Google Play

SpyderFlow Icon on Smart Device

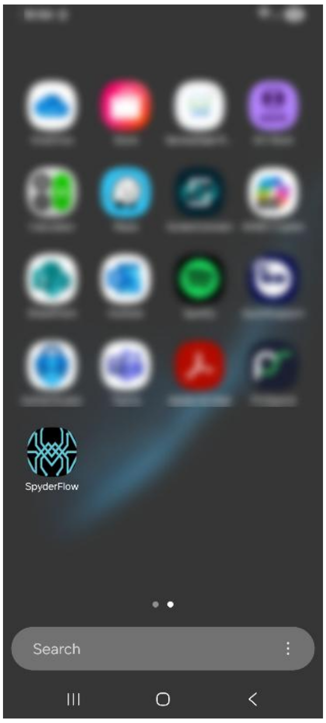
SpyderFlow Mobile App Installation Guide

The SpyderFlow app is available for download on both iOS (Apple) and Android devices.

SpyderFlow App on Apple App Store (iOS)

To install the app on an iPhone or iPad:

1. Open the App Store.
2. In the search bar, type: "SpyderFlow".
3. Select the app listed as: SpyderFlow – SpyderTech.
4. Tap the "Get" button, then authenticate if required.
5. Once the app is installed, tap "Open".
6. Choose your region:
    - *Australia*
7. Sign in using your organisation's chosen method:
    - Google Account



SpyderFlow on a Smart Device

Download on the App Store

SpyderFlow Icon on Smart Device

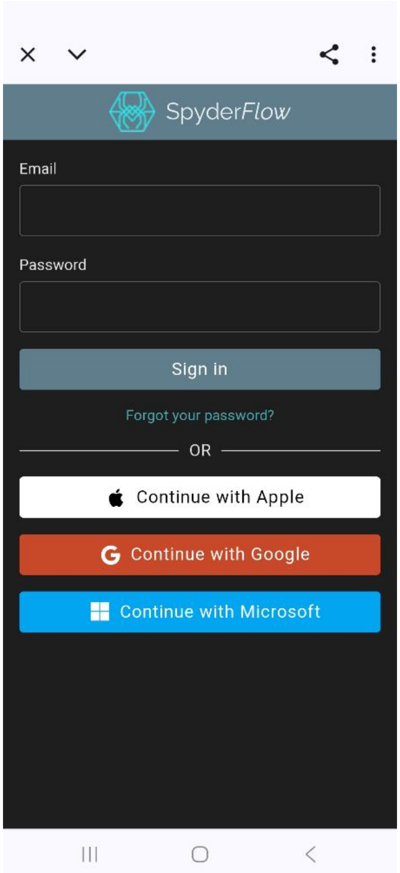


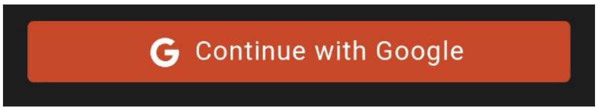
Image of the SpyderFlow app's sign-in

After Downloading the App

Once the **SpyderFlow app** is downloaded and installed on your smartphone, your **screen** will look like the image below:

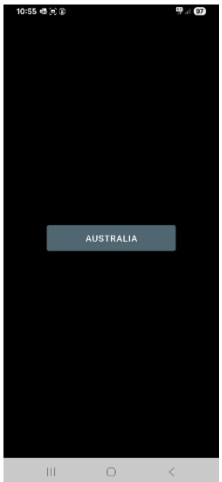
From here, you can:

- **Select your region** (Australia)
- **Sign in** using the method configured by your organisation (Google)



This screen serves as the starting point for accessing all relevant key functions within the SpyderFlow app.

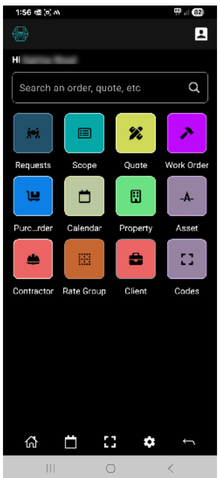
From here, users can easily navigate to the tools and information they need while on the go.



Google Sign-In and Region Selection

Once you select Google Sign-in, you will be taken to a screen to select your region.

- Tap the **Australia** button to proceed.



When you've finished the steps above, your screen will resemble the image on the right.

What's New in the Latest Update

We've modernised the overall look and feel of SpyderFlow Mobile, aligning with current mobile best practices to make the app faster, more intuitive, and easier to use.

Key Enhancements

- **Floating Action Button (FAB)**
  A single, familiar access point for record-level actions — reducing clutter and improving discoverability.
- **Card-Based Layouts**
  Details tabs and forms now follow a clean card design, improving readability, grouping information logically, and lowering cognitive load.
- **Focus Screen Pattern**
  Updated item forms and review modes now feature simplified layouts, helping you complete tasks with fewer distractions.
- **Visual & Interaction Enhancements**
  Refined spacing, cleaner formatting, and consistent design patterns deliver a polished, professional mobile experience.

Mobile App | Home Screen

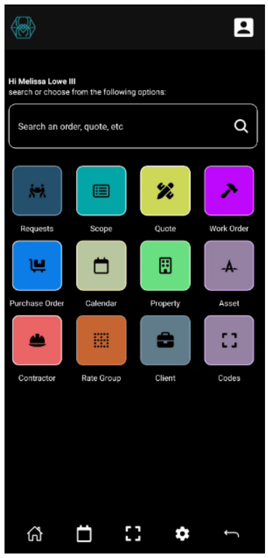
The SpyderFlow Workflow Management app keeps all your information in one place, helping you manage workflow processes across categories such as:

- Scope, Quote, and Orders
  - Flow seamlessly from scoping to quotes, work orders, or purchase orders.
- Asset & Property Management
  - Track and manage assets including property.
- Calendar
  - A centralised solution for organising events and coordinating work activities.
- Rates, Clients & Codes
  - Generate QR and barcodes, manage rate groups, and maintain client details.

Home Screen Overview

The mobile home screen gives you a quick and efficient snapshot of everything happening across the areas and activities you manage in SpyderFlow.

- **Fast search** – Quickly find orders, quotes, and more.
- **User profile & settings** – Easy access at any time.
- **Colour-coded tiles** – Jump directly into key workflow areas.
- **Code tools** – Scan or generate QR and barcodes instantly.
- **Scheduler access** – Available via the main icon or bottom toolbar, keeping your flow while on the go.



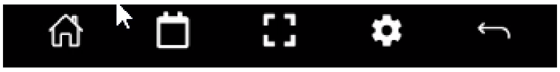
Colour-Coded Icons

The home screen uses familiar **colour-coded icons** to match SpyderFlow categories:

- Requests
- Quote
- Purchase Order
- Property
- Contractor
- Clients
- Scope
- Work Order
- Calendar
- Asset
- Rate Group
- Codes

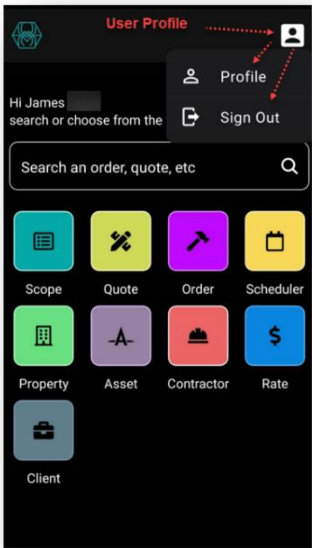
Bottom Navigation

Always available at the bottom of the screen:



- Home
- Code Scanner
- Settings
- Back

Mobile App | User Profile



The User Profile icon is located at the top right corner of the screen.

Profile

- Tap to view or update your user details.
- Opens into My Profile settings, defaulting to the Details tab, which includes:
  - Username
  - Status
  - Display Name
  - Phone #
  - Mobile #
- To edit, click the pencil icon.

Info Tab

- Displays when the profile was created, by whom, and the date of the last update.

Navigation

- Click the Back button inside the My Profile window when finished.

Sign Out

- Use Sign Out to log out of SpyderFlow.

Mobile App | Contractor

A **Contractor** is an external entity engaged to perform work for your organisation who is **not** a direct employee.

Once contractor information is entered into **SpyderFlow**, it can be referenced by the workflows carried out by system users.
In SpyderFlow, contractors may also be referred to as **External Users**, with **restricted access** to ensure data security and role-specific functionality.

Location in App

- **Mobile App → Home Screen (Mobile Dashboard)**
- The contractor profile is **linked to Contractor Workers**, who are the individuals performing work on behalf of the contractor entity.

Contractor Access

Contractors can log directly into the **SpyderFlow Mobile App** to complete required data entry.

They are assigned the **External User** role, ensuring they only access information relevant to their allocated jobs.

User Roles

Contractor Administrator

- Manages their own workers (Contractor Workers)
- Controls access for their team
- Oversees all contractor-related activities within their organisation

Contractor User (Worker)

- Performs the physical work
- Completes all data entry for allocated jobs (e.g., photos, notes, signatures, completion details)

What Contractor Users Can Do

Contractor Users have the ability to:

- Manage and update their own **Contractor Workers**
- Lock down and control access to their team's data
- Perform all activities related to **Purchase Order jobs**, including:
    - Standard work
    - Defect work
    - Job completion
    - Uploading photos
    - Submitting claims

Visual Indicator

- The **Contractor icon** is **colour-coded** within the mobile app to assist users in quickly identifying contractor profiles.

List of Contractors

The **List of Contractors** page is the default view when selecting **Contractor** from the Home screen on the mobile app.
This page functions similarly to other "List of" pages in SpyderFlow.

Key Features

Search, Sort, and Filter

- Contractors displayed on this page can be **searched**, **sorted**, and **filtered** as required.
- This assists users in quickly locating specific contractor entities.

Create New Contractor

- A **Create New Contractor** button is available on the List of Contractors page, allowing users to add a new contractor record.

Selecting Contractors

You can interact with listed contractors in two ways:

- **Tap** — to open and view the contractor's details
- **Tap and hold** — to access additional options, including:
  - Bulk selection
  - Disable multiple contractors if required

Selected Contractor Record

When a contractor is selected, users can view, add, or modify information across multiple sections.

Note: Tap **View** on each section to add, modify, or edit information.
Tap **Done** to save all changes.

Contractor Information Sections

1. Entity Details

General information identifying the contractor entity.

2. Service Type

Defines the types of services the contractor provides.

3. Entity Address

The physical address of the contractor.

4. Postal Address

Separate postal address if applicable.

5. Entity Contact

General contact information for the contractor entity.

6. Primary Contact Person

Details of the main contact within the contractor organisation.

7. Director Details

Information related to the company director(s).

8. Licences / Certificates

Upload and manage supporting documentation:

- Business licences
- Professional certificates

9. Insurance

Contractors may have multiple insurance types uploaded:

- Workers Compensation
- Income Protection
- Specialist Insurance
- Other insurance types

Attachments

Users can add photos or files relevant to the contractor.

- **Once added, attachments appear in a list where they can be searched, sorted, and filtered for easier access.**

Notes

Notes can be added with the following fields:

- **Category**
- **Alert Type**
- **Comments**
- **Note Status**

Visibility Option

Can be viewed by External Users?

- Selecting this option will allow contractors and/or clients to view the note.
- Leaving it unselected keeps the note internal.

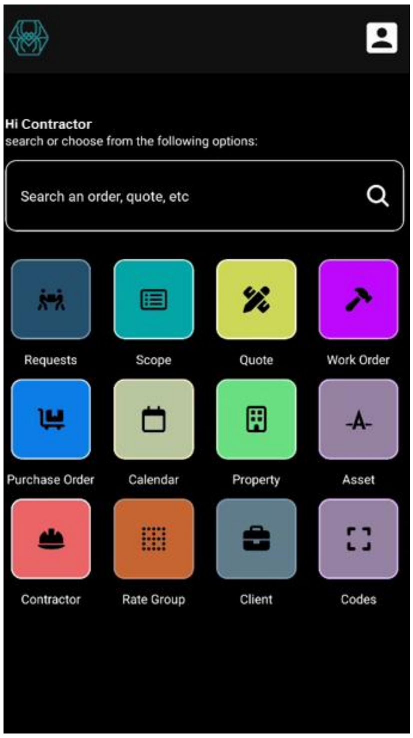
Record Level Security

SpyderFlow enforces strict record-level security (RLS) to ensure contractors only see data relevant to them.

- Information is filtered based on how each contractor is configured.
- Contractor Workers can have further restrictions applied depending on contractor requirements.
- This ensures data privacy, compliance, and role-appropriate access.

How to Change Subscription on the Mobile App

1. Open the Profile Menu



- From the Dashboard screen, tap the Profile icon located at the top right.

2. Select "Subscriptions"

- This will open the Subscriptions page.
- All subscriptions linked to your login will be displayed.

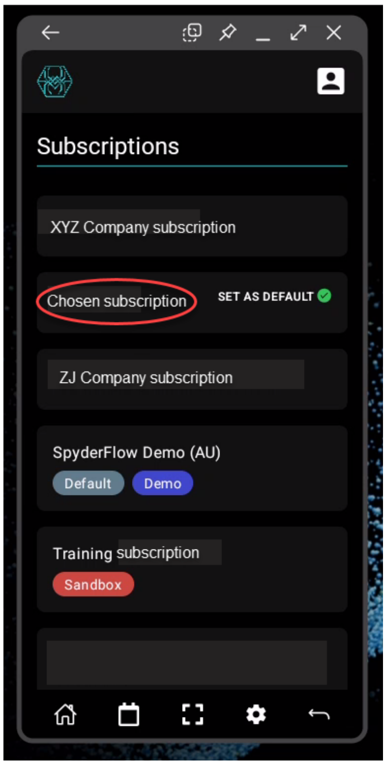
3. Choose the Required Subscription

- Tap the subscription you wish to switch to.
- A green tick will appear next to the selected subscription.

4. (Optional) Set as Default

- You may choose "Set as Default" if you want this subscription to always load when logging in.

5. Confirmation Message



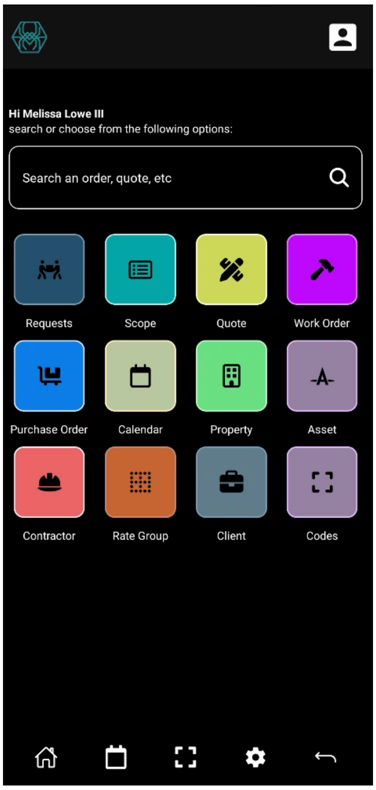
- A green shaded validation message will appear at the bottom of the screen confirming the subscription has been changed successfully.

6. Return to Dashboard

- Tap the Home icon (bottom left of the screen).
- The Dashboard will refresh, and you will now be active in the selected subscription account.

Why This Is Useful

- Allows fast switching between subscriptions
- No need to log out and log back in
- Ideal for users who manage or work across multiple organisations or contractor accounts



Note

- Default, Demo, and Sandbox icons may appear to indicate different subscription types.
- If none of these icons are displayed, it means you only have access to production (live) subscriptions, and not demo or training environments.
- When a subscription is set as Default, this will be the subscription the user automatically logs into each time, until the default is changed.

Mobile App | Overall Search

The search function is available directly from the Home Screen (Mobile Dashboard).

How to Search

- Use keywords or partial combinations of letters or numbers.
- Search across addresses, order numbers, asset names, categories, and more.
- Results are colour coded to match the Dashboard icon categories (e.g., *Green = Property*, *Purple = Order*).

Handy Hints

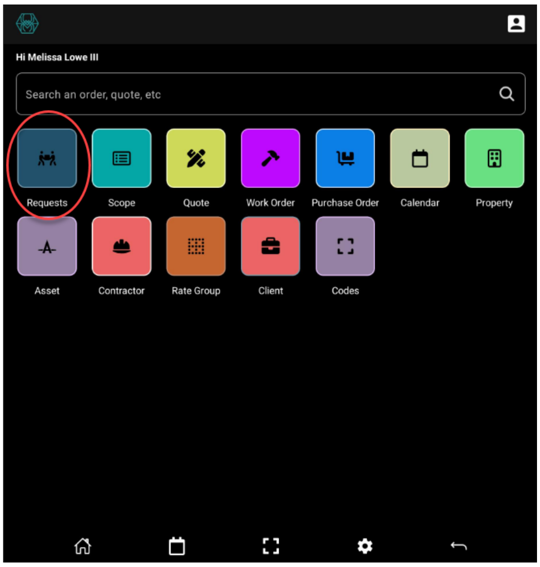
- Keep it simple – search as you would ask the question.
- The more criteria entered, the narrower and more specific the results.
- The less criteria entered, the broader the results returned.

Examples

- For an address → type a keyword or starting letter.
- For a work order → enter the order number, starting with “W”.
- For a category → type the category name, e.g., *Property*, *Asset*, *Land*, *Vehicle*.

Mobile App | Requests

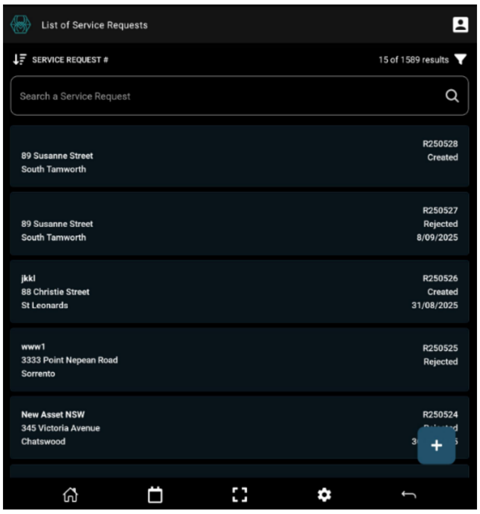
The Service Request Module in SpyderFlow Mobile provides a streamlined way to submit, manage, and track external requests or issues. It improves transparency, collaboration, and efficiency between external users and your internal teams.



Service Request Status Definitions

- **Created**
  - The service request has been logged.
- **Issued**
  - The request is ready for triage.
- **Accepted**
  - All requests have been approved.
- **Rejected**
  - One or more requests have been declined.
- **Closed**
  - All activities related to the request are complete.
- **Cancelled**
  - The request has been marked invalid.

Mobile App | List of Service Requests



Navigation:

Home Screen → Requests → *List of Service Requests*

Adding a New Service Request

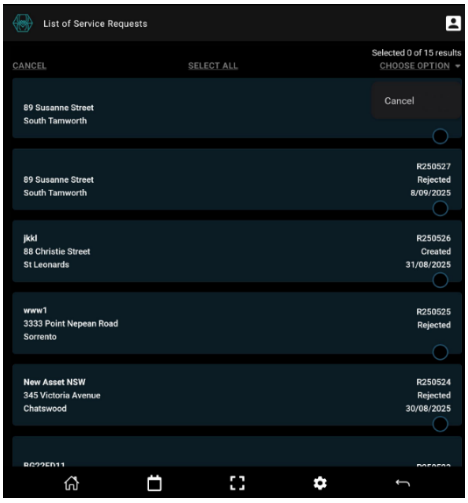
- Tap the "+" button to create a new request.
- Opens the Details page to complete required fields.

Managing the Service Request List

- Sort & Filter – Organise requests to suit your workflow.
- Search – Quickly find a specific service request.

Selecting Requests

- Tap – Opens an individual service request to view, edit, or add information.
- Tap & Hold – Enables bulk selection:
  - Access additional options.
  - Select multiple records to cancel if required.



Bulk select with Choose Option. Can select and choose to canel multiple records.

Mobile App | Add a New Service Request

1. Start a New Request

- From the List of Service Requests, tap the floating “+” button.
- Opens the Create New window.

2. Complete Required Fields

Fill out fields as per your organisation’s business process. Some may be pre-filled:

- Property or Asset
- Type
- Scheduled Start
- Due
- Reported by
- Reported by Phone
- Contact Name
- Contact Phone
- Reference
- Comments
- Flags
- Company
- Client
- Area
- Category
- SRQ Owner
- Inspector
- Inspector Phone
- Rate Group

3. Save & Continue

- Tap **Save** when complete.
- The Service Request will open into a data focus window, where you can add more information:
    - Requests
    - Details
    - Attachments
    - Notes

4. Requests Tab & Menu

- By default, the request opens in the Requests tab.
- A floating arrow at the bottom of the screen opens the Requests Menu for additional options.

Mobile App | Requests Tab

Accessing the Requests Tab

- Ensure the Requests tab is selected at the top of the screen.
- Navigate: Request → Data Focus Screen → Requests

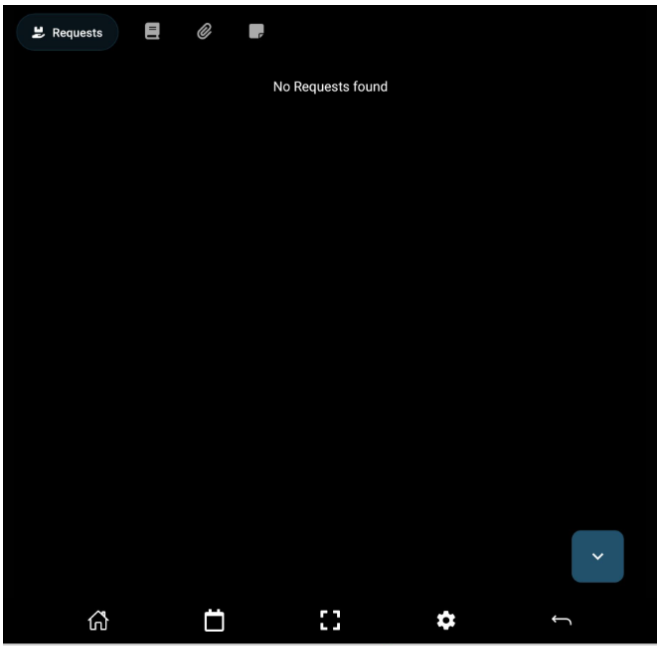
Using the Floating Arrow Menu

- Tap the floating arrow at the bottom of the Requests tab screen.
- Menu options appear: Add Request, Exit, Review, Submit

Adding a Request

1. Tap + Add Request
2. Fill in fields as required by your organisation's business process:
    - Problem
    - Location
    - Quantity (Qty)
    - Unit of Measure (UOM)
    - Instructions
3. Tap Save & Add to add more requests, or Save & Done when finished

- Requests will appear in a summarized list format on the data focus screen.
- To add attachments to a request:
    - Select the request from the list
    - Edit/add attachments (option available after saving the request)

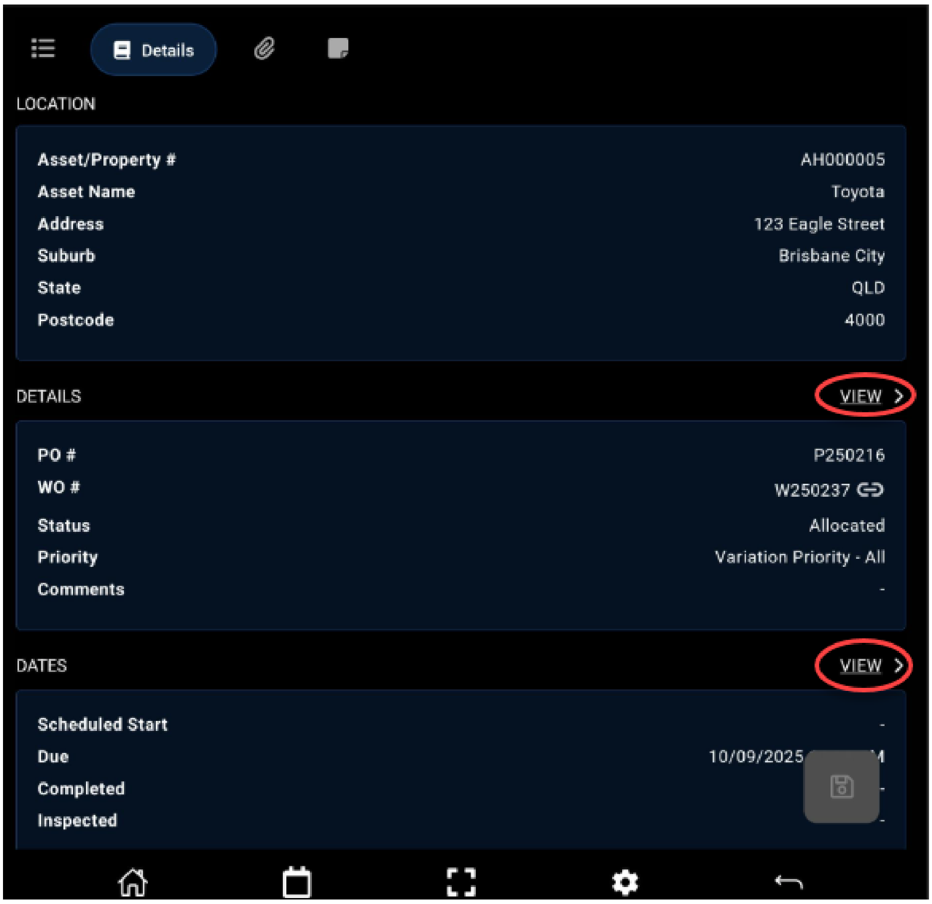


Mobile App | Details Tab

- The Details tab is the second tab from the left.
- Displays grouped information about the request in a tiled layout.
- Clickable View buttons allow editing (as permitted by your organisation).

Grouped Information Includes:

- Location
- Details
- Dates
- Contacts
- Flags
- Settings
- Record Metadata

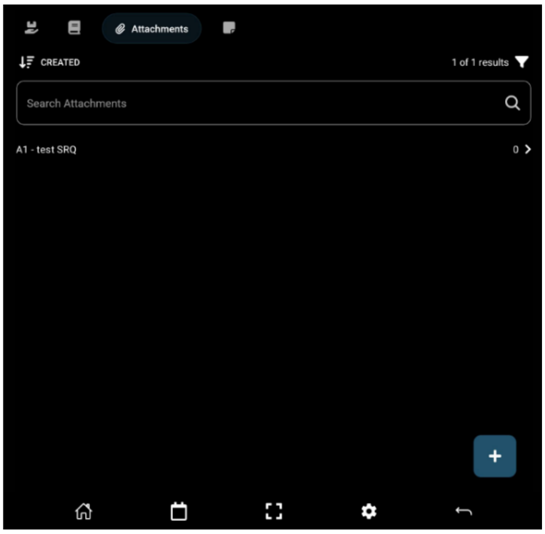


Mobile App | Attachments Tab

The Attachments tab is the third tab from the left.

- Attachments can be searched, sorted, and filtered once added.

Adding an Attachment



1. Tap the floating "+" button.
2. Fill in required fields:
    - Attachment Type
    - Title
    - Attachment Status
    - Can be Viewed by External Users? (if applicable)
3. Once added, each attachment opens into its own data focus page with three tabs:
    - Photos
    - Documents
    - Details

Photos & Documents Tabs

- Tap the floating "+" to add items.
- Options include:
    - Take a new photo
    - Choose a photo
    - Choose a file

Details Tab

- Displays information in a tiled layout.
- Click View to add or modify details, as permitted by your organisation.

Completing the Attachment

- After saving, the title of the attachment appears in the list on the data focus page under the Attachments tab.
- Tap to modify or add as required.
- Tap Save when complete.

Example: An attachment may be added with a title, but still show '0' photos, documents, or files uploaded until content is added.

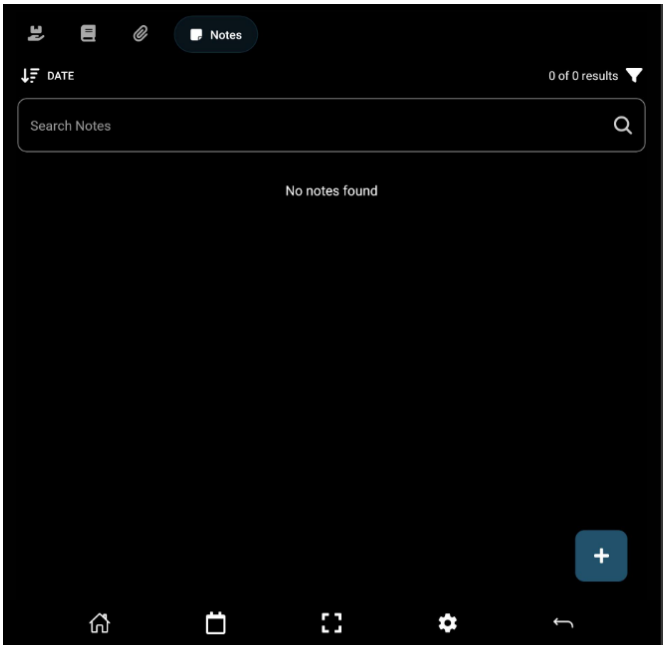
Mobile App | Notes Tab

The Notes tab is the fourth and last tab from the left.

- Notes can be searched, sorted, and filtered once added.
- Like attachments, you can specify whether a note "Can be visible to External Users" when creating it.

Adding a Note

1. Tap the floating "+" button.
2. Complete the New Note form:
   - Category
   - Alert Type
   - Comments
   - Status
   - Can be Viewed by External Users?
3. After saving, the note appears in a list on the data focus page under the Notes tab.
4. Tap a note to edit or modify, as permitted by your organisation.



Mobile App | Selected Service Request

You can select an individual Service Request from the List of Service Requests to view, add to, or modify it.

Viewing Service Request Details

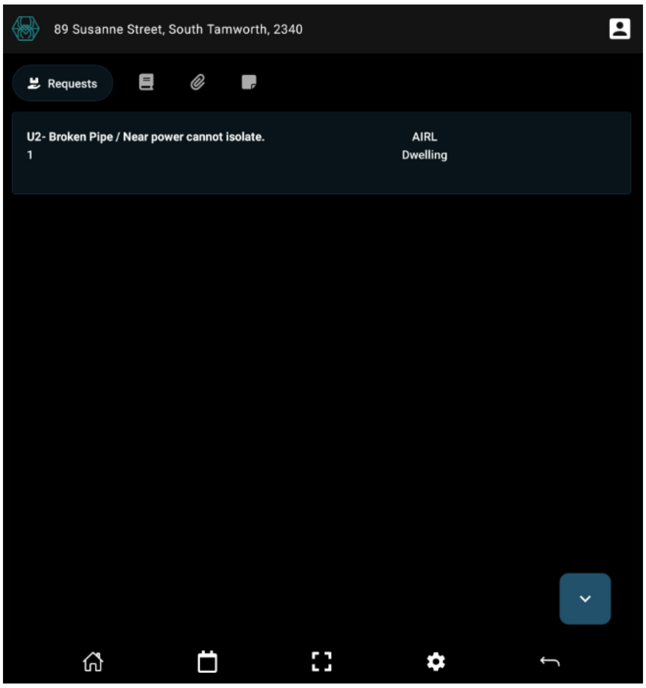
- The top of the screen displays key information about the Service Request:
  - For a property → shows the address
  - For an asset → shows the asset name
- Below this information are the four tabs:

1. Requests – List of problems or issues submitted
2. Details – Core information about the Service Request
3. Attachments – Files, photos, and documents
4. Notes – Additional relevant information

See previous sections for instructions on how each tab works. Once a request is created, it can be added to or edited until complete.

Floating Arrow Menu

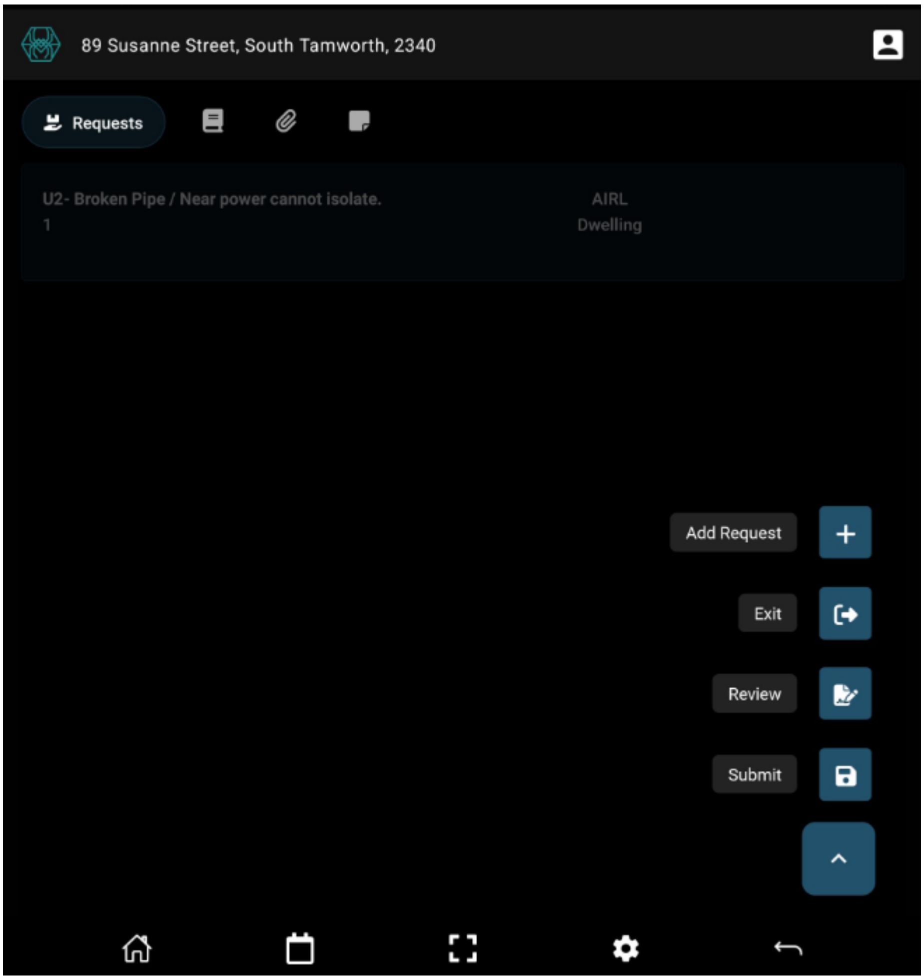
- The arrow at the bottom of the screen opens additional options:
  - Add Request
  - Exit
  - Review
  - Submit



Mobile App | Request Menu (Floating Arrow)

The floating arrow at the bottom of a Service Request screen opens the Request Menu, providing quick access to key actions:

- Add Request – Tap to add additional requests to the Service Request.
- Exit – Return to the List of Service Requests without making changes.
- Review – Review the request and:
  - Tick if completed/accepted
  - Choose X to decline the request
- Submit – Send all changes or updates to the client or subscriber.



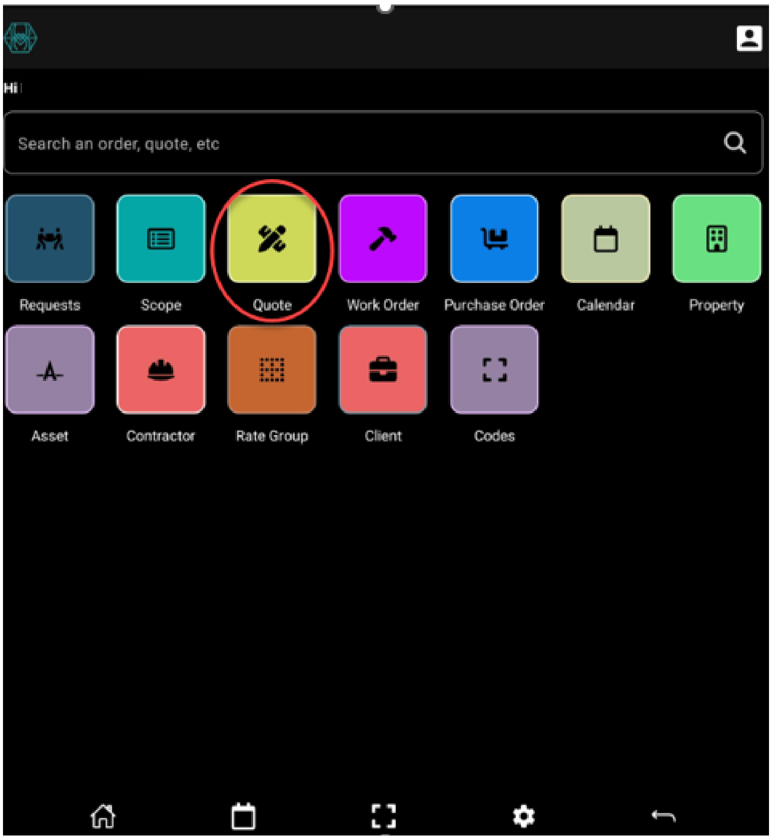
Mobile App | Quote

Dashboard Screen

- The Dashboard appears by default upon sign in or sign up.
- Select colour-coded workflows and sections directly from the dashboard.
- User Profile icon is located at the top right of the screen.
- Shortcut buttons along the bottom of the screen provide quick access to:
  - Home
  - Calendar
  - Code Scanner
  - Settings
  - Back (<)

Accessing Quotes

- Tap the Quote button on the main app screen to view or create quotes.



Mobile App | List of Quotes

When you open the **List of Quotes**:

- SpyderTech logo appears on the left side of the screen.
- User Profile icon is located at the top right.
- Listed quotes appear on the screen. You can:
  - Tap to select an individual quote
  - Tap & Hold to access additional options

Display & Order

- Quotes are displayed based on your Sort or Filter selections.
- If no sorting/filtering is applied, quotes are displayed in last listed format.

Search, Sort & Filter

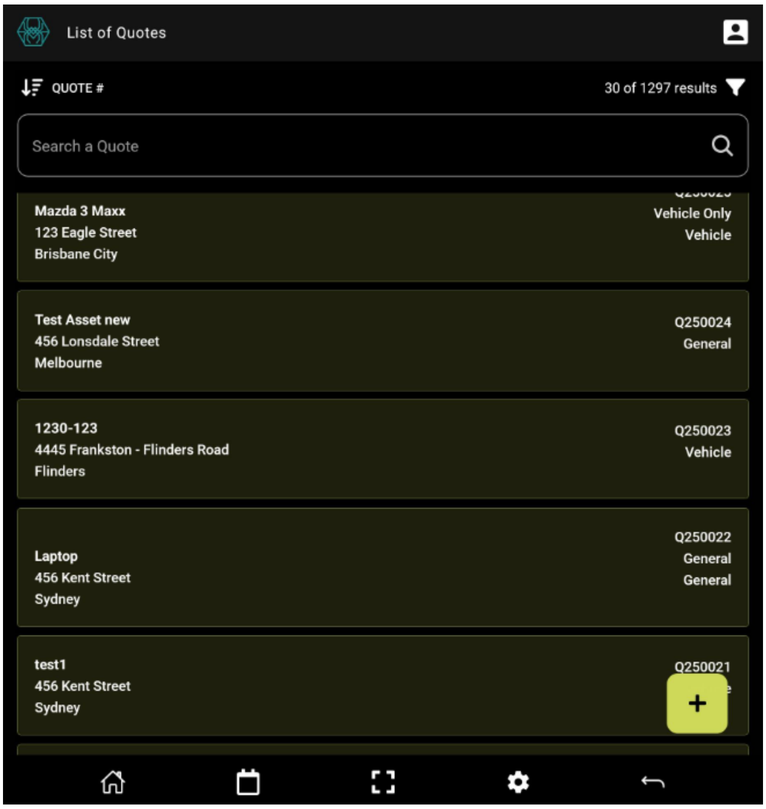
- Search quotes using keywords or partial alphabetical/numerical values.

Sort By:

- Address
- Due Date
- Quote #
- Suburb

Filter By Status:

- Cancelled
- Created
- Paused
- Quote Awarded
- Quote Received
- Quote Review
- Required Quote Sent
- Unsuccessful



Mobile App | Add a New Quote

1. Start a New Quote

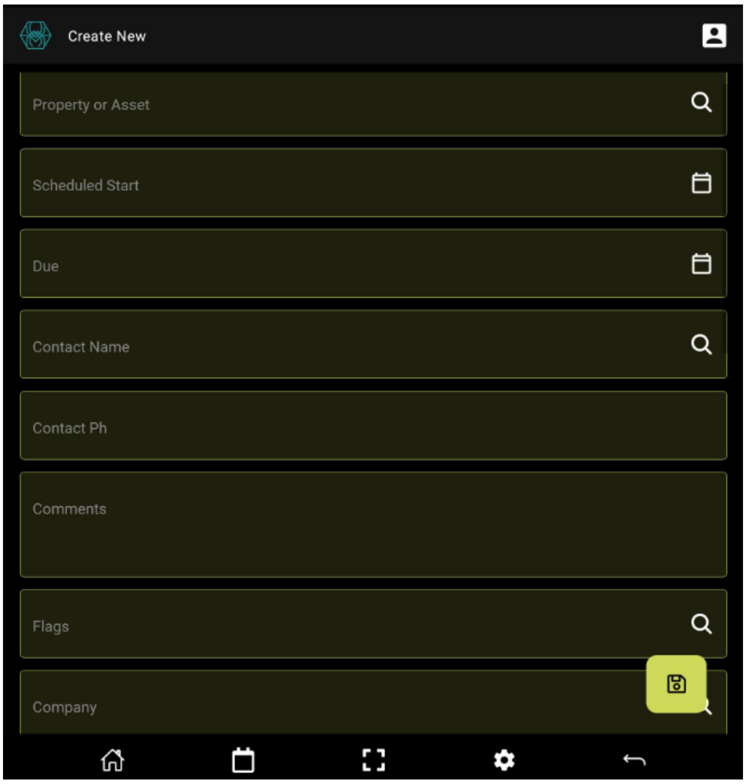
- Tap the floating "+" button on the List of Quotes screen.
- Opens the Create New screen.

2. Fill Out Required Fields

- **Property or Asset** – Start typing to see prefill options for available properties or assets
- **Scheduled Start** – Select date and time from calendar
- **Due** – Select date and time from calendar
- **Contact Name** – Add or search for a contact
- **Contact Phone** – Add or search phone number
- **Comments** – Optional notes
- **Flags** – Search and select available flags for your organisation
- **Company** – Your company issuing the quote
- **Client** – Client the quote is for
- **Area** – Location of the service
- **Category** – Service category
- **Quote Owner** – Name of the owner
- **Quote Owner Phone** – Contact number
- **Quote Estimator** – Name of estimator
- **Estimator Phone** – Contact number
- **Inspector** – Name of inspector
- **Inspector Phone** – Contact number
- **Rate Group** – Select the applicable rate group

3. Save Quote

- Tap Save when complete.
- A validation message will appear at the bottom of the screen confirming the quote has been created successfully.



Mobile App | Quote Data Screen

After creating a quote, the user is redirected to the Data Screen.

Top Section

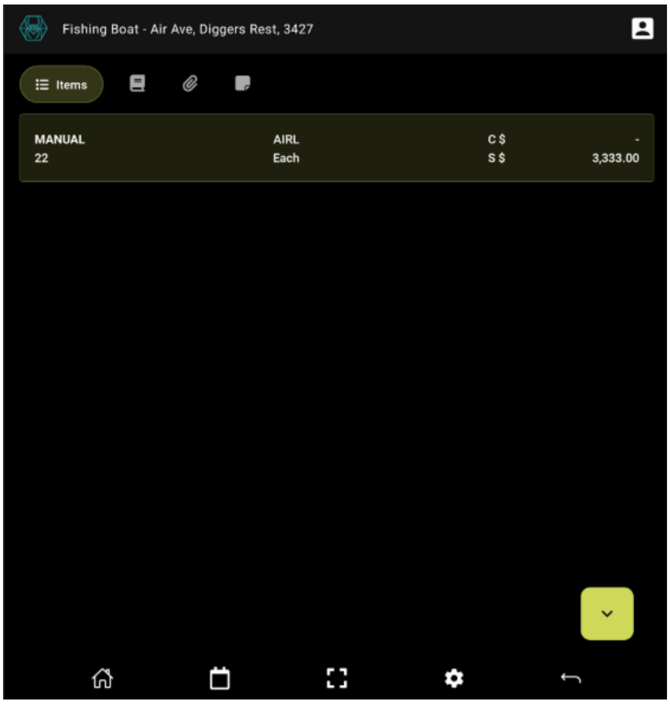
- Displays quote details, summarising what the quote is for.

Tabs

- **Items** – List of items added to the quote (appears as each item is added)
- **Details** – Core information about the quote
- **Attachments** – Files, photos, and documents related to the quote
- **Notes** – Additional information relevant to the quote

Floating Arrow Menu

- Located at the bottom right of the screen
- Provides quick access to actions:
  - **Add Item** – Add new items to the quote
  - **Award** – Mark the quote as awarded
  - **Exit** – Return to the List of Quotes
  - **Send** – Send the quote to the client or subscriber



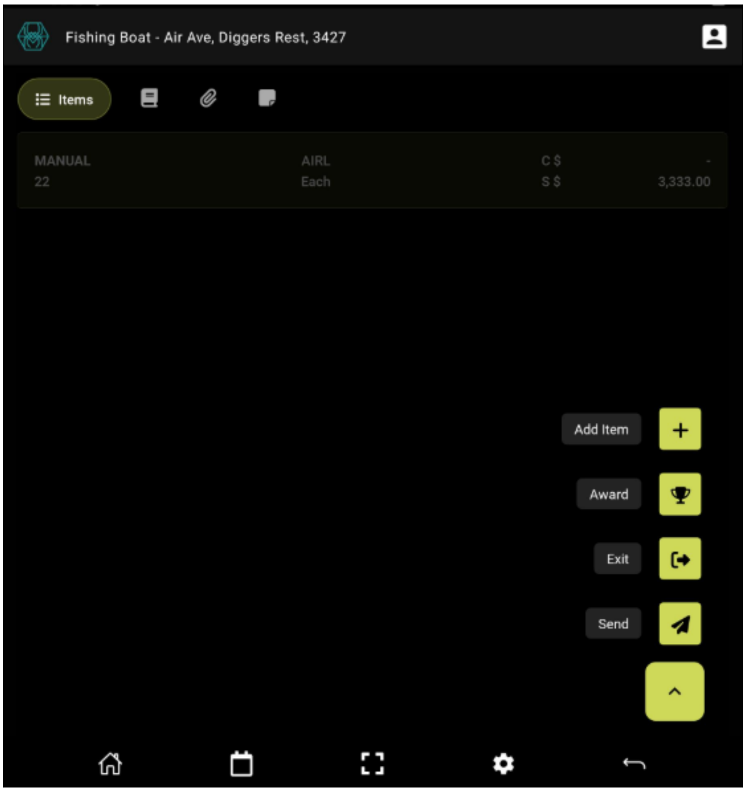
Mobile App | Quote Items

Accessing Items

- **Tap the Items tab on the Quote Data Screen.**
- **Opens the Items menu with available actions.**

Menu Options

- **Add Item**
  - Opens a blank item form.
  - Fill in required fields:
    - Item Code
    - Location
    - Quantity (Qty)
    - Unit of Measure (UOM)
    - Keywords
    - Comments
    - Sell $ (including tax)
  - Save & Add – Add additional items one by one
  - Save & Done – Finish adding items and return to the items list
- Award – Award the quote/item to a contractor
- Exit – Return to the List of Quotes
- Send – Send any changes made to the items


Fishing Boat - Air Ave, Diggers Rest, 3427
Items
MANUAL
22
AIRL
Each
C $
S $
-
3,333.00
Add Item
Award
Exit
Send

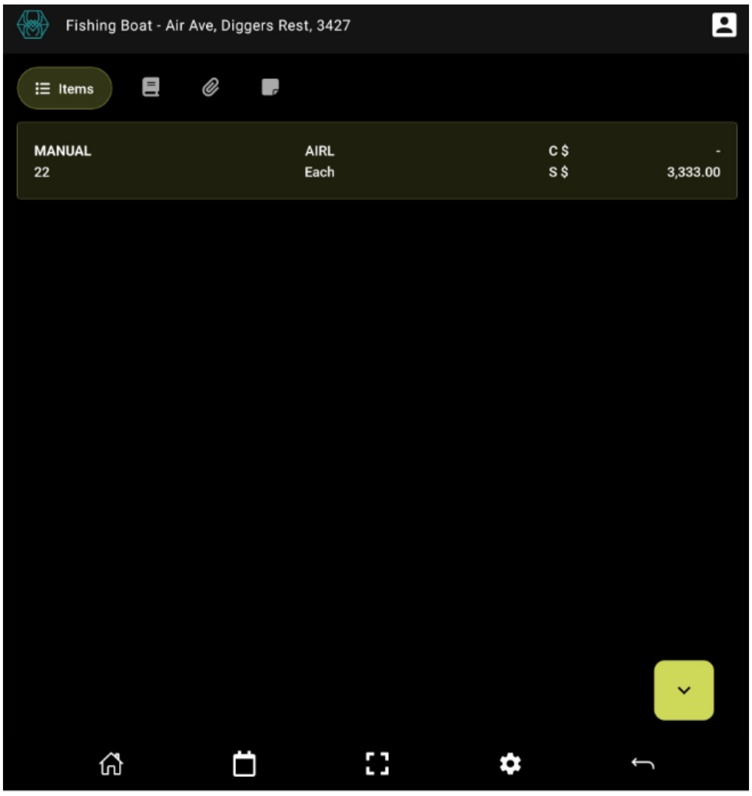
Mobile App | Managing Listed Items in a Quote

Accessing an Item

- **Navigate: Select a Quote → Items Tab → Select an Item**

Adding Cost and Attachments

- **Add Cost Price**
  - Tap + Add Cost Price to enter the cost of the item.
  - Note: A cost price must be added before the quote can be awarded.
- **Add Attachments**
  - Tap + Add Attachments to include relevant files, photos, or documents for the item.
- Once added, the item details are updated in the Items tab list.



Mobile App | Inside a Quote Item

Adding Cost Price

1. Tap into the **Item** from the **Items tab**.
2. Scroll to the **bottom of the screen**.
3. Tap **+ Add Cost Price**.
4. Enter the **cost price** for the contractor.
5. Options:
    - **Save & Add** – Add multiple cost prices
    - **Save & Done** – Return to the **selected item details page**

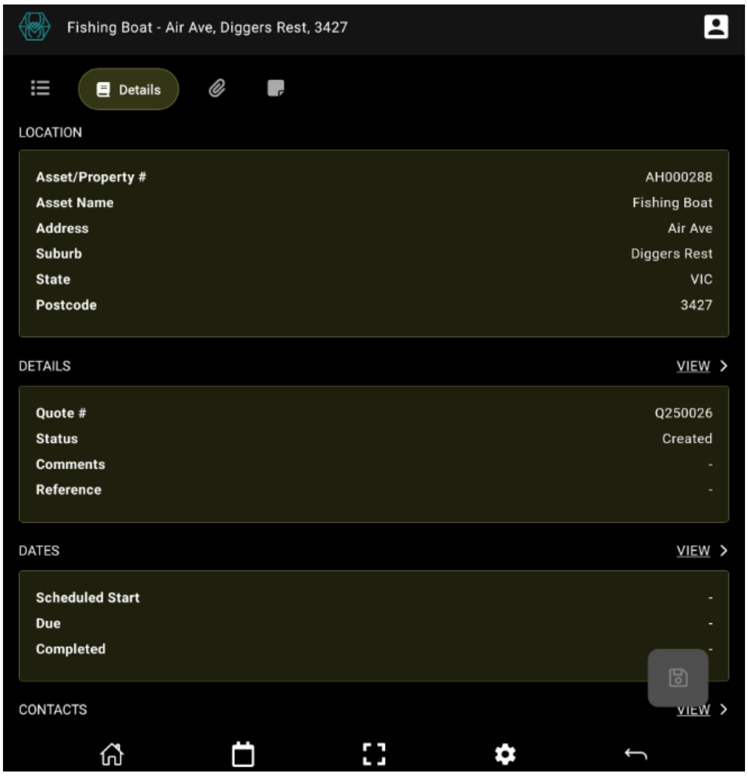
Note: A cost price must be added before the quote can be awarded.

Adding Attachments

1. Tap + Add Attachment in the item.
2. Opens an overlay with options:
    - Take a new photo
    - Choose a photo
    - Choose a file
3. Follow prompts to upload or take a photo/file.
4. Tap Save after each photo or file.
5. When finished, tap Save & Done.

Attachments will appear both on the Quote Data Screen and within the individual item.

Details Tab



- The Details tab is the second tab from the left in the Quote.
- Opens the Purchase Order Details page in a tiled layout, grouped as:
  - Location
  - Details
  - Dates
  - Contacts
  - Flags
  - Settings
  - Record Metadata
- Sections that can be modified will show a View option for editing, as permitted by your organisation.
- Tap Save when changes are complete.

Mobile App | Attachments Tab

The Attachments tab is the third tab from the left in a quote or item.

- Added attachments can be searched, sorted, and filtered.

Adding an Attachment

1. Tap the floating “+” button.
2. Fill in the required fields:
   - Attachment Type
   - Title
   - Attachment Status
   - Can be Viewed by External Users? (if applicable)

Attachment Data Focus Page

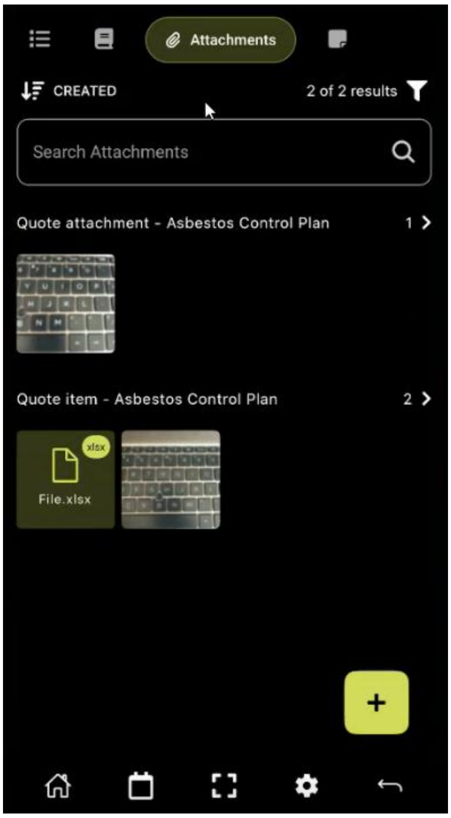
Each attachment opens into its own data focus page with three tabs:

- Photos – Tap + to:
  - Take a new photo

  - Choose a photo
- Documents – Tap + to:
  - Choose a file
- Details – Displayed in a tiled layout with clickable View to add or modify details as permitted by your organisation.

Completing the Attachment

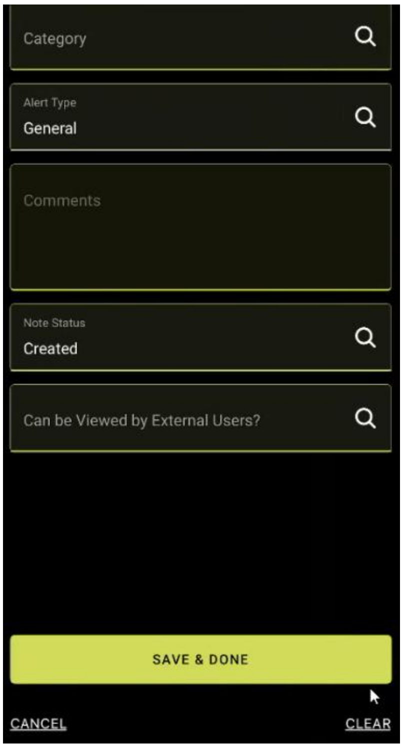
- After saving, the **title of the attachment** will appear in a list format under the Attachments tab.
- Tap an attachment to **modify or add content** as needed.
- Tap **Save** when finished.



Mobile App | Notes Tab

The Notes tab is the fourth and last tab from the left in a quote or item.

- Notes can be searched, sorted, and filtered once added.
- Like attachments, you can specify whether a note “Can be visible to External Users” when creating it.

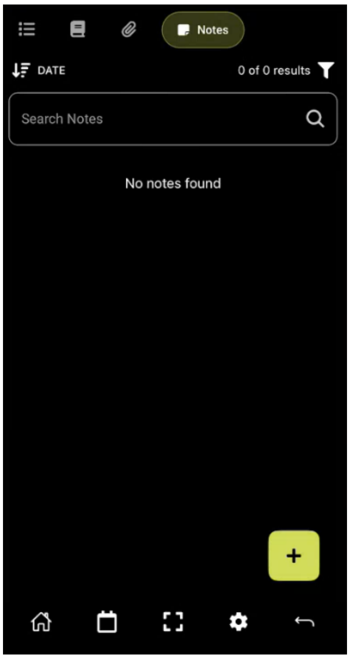


Mobile App | Adding a Note

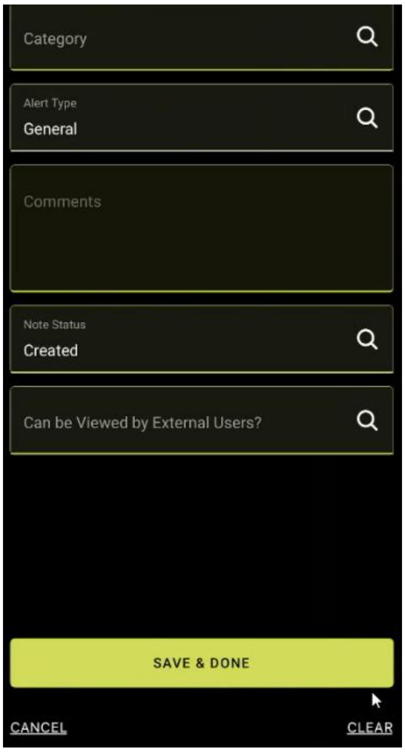
1. Tap the floating “+” in the Notes tab.
2. Fill out the required fields:
   - Category
   - Alert Type
   - Comments
   - Status
   - Can be Viewed by External Users?
3. Tap Save & Done to save the note and return to the Notes list.

Mobile App | Notes Tab – Viewing & Editing

- After saving, the note appears in a list on the data focus page under the Notes tab.
- Tap a note to view or edit its details, as permitted by your organisation's settings.

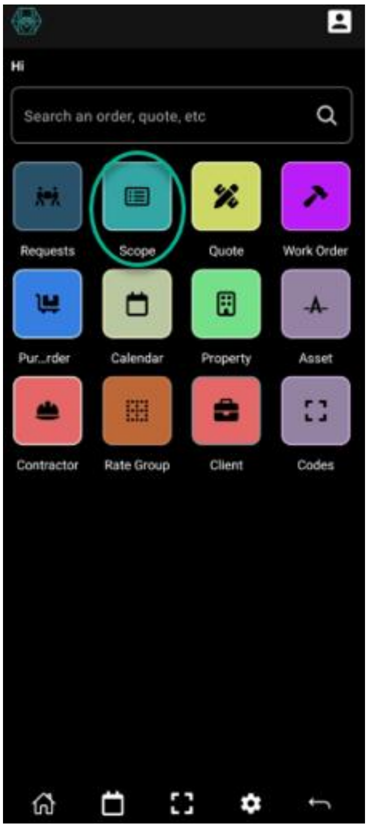


Fill out fields when adding a note . Save & Done



Mobile App | Scope

The Scope module in SpyderFlow allows you to create, manage, and track scope of works with supporting items, attachments, and notes.



Accessing Scopes

- On sign in/sign up, the dashboard appears by default.
- Tap the Scope icon → Opens into the List of Scopes.

List of Scopes

- Use the list to search, filter, and view scopes using partial or full:
  - Numbers
  - Keywords
  - Other details
- Select a scope to:
  - View or modify
  - Add items, details, attachments, and notes

Scope Status options include:

- Created
- Allocated
- Data Entry Required
- Review Required
- Review & Approved
- Paused
- Cancelled

New Features in Scopes

- Create New is replaced with the floating “+” button.
- Once scope details are added, the user is redirected to the Data Screen with tabs:
  - Items
  - Details
  - Attachments
  - Notes

Items Tab (Scope)

When Items is selected, a new menu opens with options to:

- Add Item
- Award
- Exit
- Send

Attachments & Notes

- Attachments can be added to individual items or to the scope itself.
- Both Attachments and Notes allow a checkbox to indicate:
    - “View by External Client or Contractor?” (tick or leave unticked).

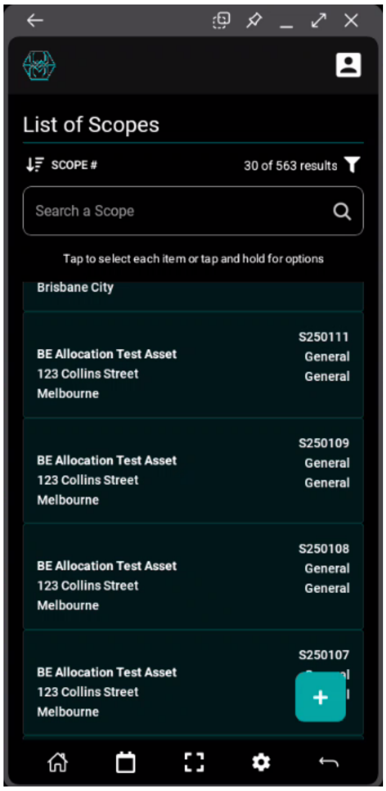
Mobile App | List of Scopes

The List of Scopes screen provides a centralised view to search, sort, filter, and manage existing scopes.

Layout & Navigation

- SpyderTech logo – top left of screen
- User Profile – top right of screen
- Scopes List – displayed in the main view
    - Tap to open a scope and view/modify details
    - Tap and Hold to access options for bulk or additional actions

Search, Sort & Filter



- Search – Use keywords or partial alphabetical/numerical values
- Sort By:
    - Address
    - Due Date
    - Scope #
    - Suburb
- Filter By Status:
    - Allocated
    - Cancelled
    - Created
    - Data Entry Required
    - Paused
    - Review Required
    - Reviewed & Approved

Shortcut Buttons (bottom toolbar)

- Home – return to dashboard
- Calendar – open scheduling view
- Code Scanner – scan QR/barcodes
- Settings – open app settings
- Back – return to the previous screen

Add a New Scope

- Tap the floating "+" button to create a new scope.

Mobile App | Add New Scope

Steps to Create a Scope

1. From the Home Screen, tap the Scope icon.
2. On the List of Scopes screen, tap the floating "+" button to add a new scope.
3. Complete the form fields as per your organisation's business process.
   - Scroll through all sections and ensure red mandatory fields are filled.

Fields to Complete

- Property or Asset – Start typing to see prefill options from available records
- Scheduled Start – Select date and time from calendar picker
- Due – Select date and time from calendar picker
- Contact Name – Add or search for an existing contact
- Contact Phone – Add or search phone number
- Comments – Optional field
- Flags – Search and select available flags defined by your organisation
- Company – The company issuing the scope
- Client – The client the scope is for
- Area – Location/area related to the scope
- Category – Service category
- Scope Owner
- Scope Owner Phone
- Scoper
- Scoper Phone
- Inspector
- Inspector Phone
- Rate Group – Select the appropriate rate group for items

Save & Continue

- Once all details are complete, tap Save and Next.
- A highlighted validation message will confirm successful creation along the bottom of your screen.
- The scope will open automatically in the Data Screen, ready for you to manage:
  - Items
  - Details
  - Attachments
  - Notes

Mobile App | Scope – Add Item(s)

Adding an Item

1. From the Scope Data Screen, tap Items.
2. Tap Add Item.
3. Fill out the required fields:
    - Item
    - Location
    - Qty
    - UOM (Unit of Measure)
    - Keywords
    - Comments
    - Unit Sell $ (incl tax)
    - Liability Type
    - Liability %

Save Options

- Save & Add – Keeps you in the add-items screen to continue adding more items.
    - Each saved item will appear in the list at the bottom.
    - Fields clear, ready for the next entry.
- Save & Done – Saves the current item and returns you to the Items list on the Data Screen.

Selecting Listed Items

- **Tap any listed item to manage it further.**
- **Options include:**
    - **+ Add Attachment**

Adding an Attachment to an Item

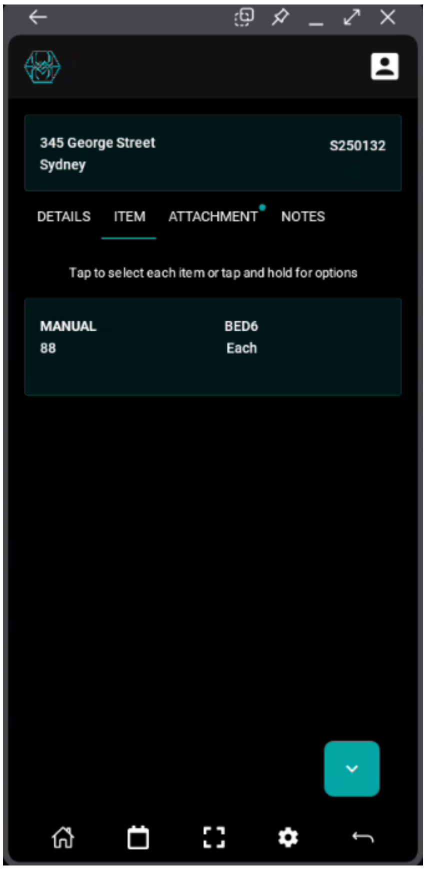
1. Tap + Add Attachment.
2. Fill in attachment details:
    - Attachment Type
    - Title
    - Attachment Status
    - Can be Viewed by External Users? (Client or Contractor, depending on organisation settings)
3. Tap the arrow on the right to access the add menu.
4. Tap + and choose:
    - Take a New Photo

   - Choose a Photo
   - Choose a File
5. Tap Save & Done when complete.

- The attachment will then display in the Attachment list under the selected item.

Mobile App | Scope – Details

- Details automatically flow through from when the scope was created.
- To modify, tap View in each section.
- Make changes and tap Save.
- If the Save button is greyed out, there are no changes to save (details are already up to date)**Mobile App | Scope – Attachments**



- Attachments can be searched, sorted, and filtered.
- Tap an attachment to open its details page.
- Tap the floating "+" button to add a new attachment.
- Complete required fields, including whether the attachment "Can be Viewed by External Users?" (if enabled by your organisation).

Mobile App | Scope – Notes

1. Tap the Notes tab.
2. Tap the floating "+" button to add a note.
3. Fill in the new note form:
    - Category
    - Alert Type
    - Comments
    - Note Status
    - Can be Viewed by External Users? (if enabled by your organisation)
4. Tap Save & Done when complete.

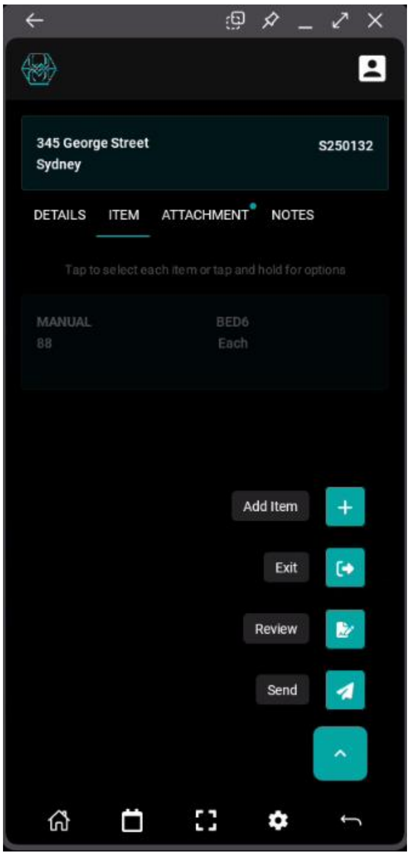
Mobile App | Scope – Existing Scopes

1. From the **List of Scopes**, tap a scope to open.
2. The scope opens by default into the **Data Screen**, with tabs for:

- Items – Review or add items
- Details – Review or update fields such as Scheduled Start, Contacts, Scoper, and Clients
- Attachments – Review or add documents and images
- Notes – Review or add alerts and general information

⚠️ **Remember: Select "Can be Viewed by External Users?" for attachments and notes if required.**

- If this option is not visible, check with your **System** Administrator for configuration.



Floating Action Menu (Scope)

Tap the **floating arrow** at the bottom of the Data Screen for options:

- Add Item
- Exit – Return to List of Scopes
- Review – Review the scope
- Send – Send updates

Mobile App | Work Order

Dashboard Screen

- The Dashboard appears by default on sign in / sign up to the SpyderFlow mobile app.
- Tap the Work Order icon to open the List of Work Orders (default view).

List of Work Order

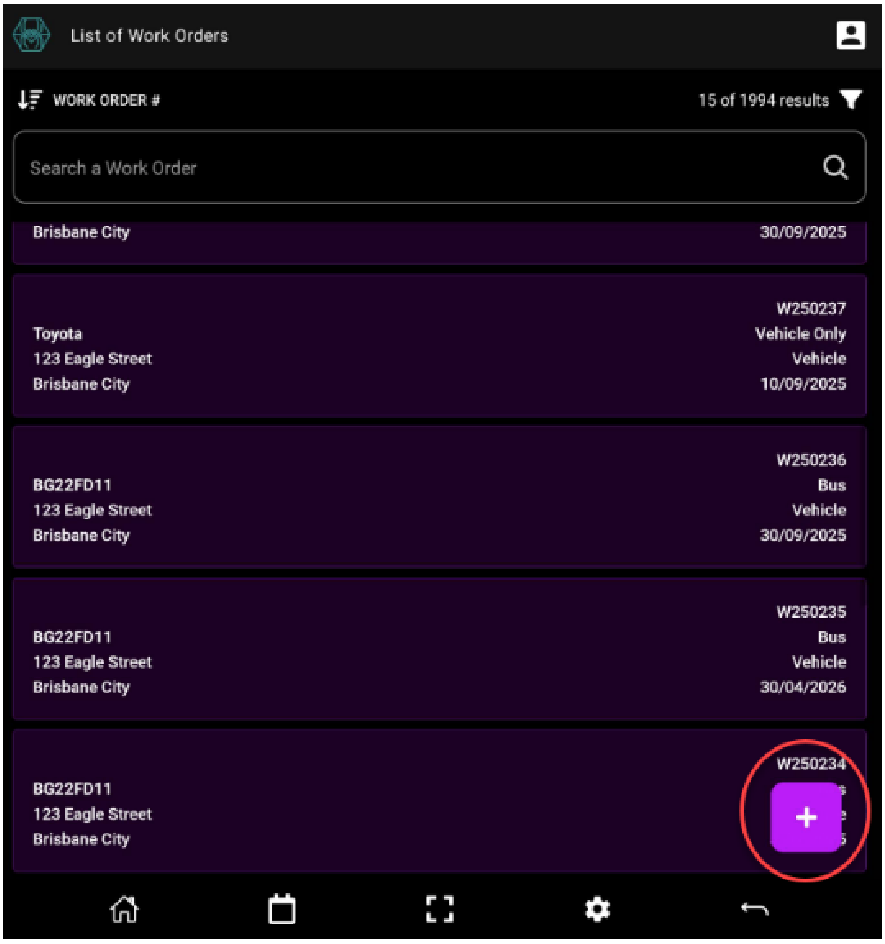
- Use the list to search, filter, and view work orders by partial or full:
  - Numbers
  - Keywords
- Tap a Work Order to view or modify.
- From here you can add: Items, Details, Attachments, and Notes.
- Status options include:
  - Created
  - Allocated
  - Data Entry Required
  - Review Required
  - Review & Approved
  - Paused
  - Cancelled

New Features in Work Orders

- Create New replaced by the floating "+" button.
- Improved layout for a cleaner, modern look.
- After entering scope details, the app redirects to the new Data Screen with tabs:
  - Items
  - Details
  - Attachments
  - Notes
- On the Items tab, tap to open the action menu with options:
  - Add Item
  - Award
  - Exit
  - Send
- Attachments can be added at the item level or at the Work Order level.
- Attachments and Notes both include the checkbox:
  - "View by External Client or Contractor?" (tick to share, untick to keep internal).

Add a New Work Order

1. Go to List of Work Orders.
2. Tap the floating "+" button (circled in image below).
3. Fill in details as required (mandatory fields highlighted in red).
4. Tap Save & Next.
5. The new Work Order opens in the Data Screen to continue setup.



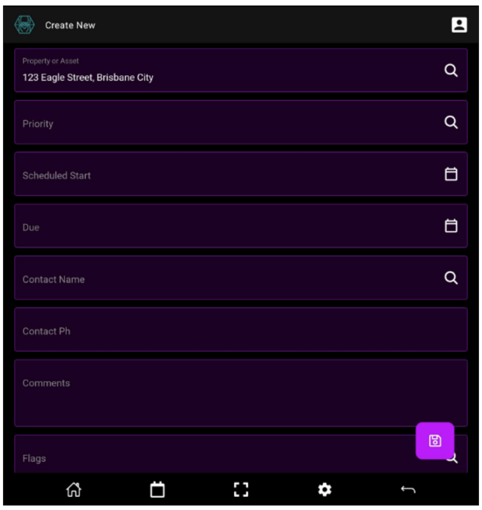
Add New Work Order

When creating a new Work Order, fill in details:

Search for Address

- Begin typing a partial or full address/property/asset name.
- Select from the prefilled options available in the system.
- ⚠️ If the property or asset is not yet in the system, check with your System Administrator or Manager to add it before proceeding.

2. Fill in Required Fields
    - Priority (e.g., Urgent, Routine).
    - Scheduled Start (select from date/time calendar).
    - Due Date / Time (select from date/time calendar).
    - Contact Name (search or enter).
    - Contact Phone (search or enter).
3. Additional Fields
    - Comments (if required).
    - Flags (search and select available flags for your organisation).
    - Company (the company creating the Work Order).
    - Client (the client receiving the Work Order).
    - Rate Group (items rate group as per organisation setup).
4. Save Work Order
    - Click Save.
    - If all mandatory fields (marked in red) have been filled, a validation message will appear confirming the Work Order was created successfully.
    - If an error occurs, missing fields will be highlighted in red. Fill them in, then Save again.



Items, Details, Attachments, Notes

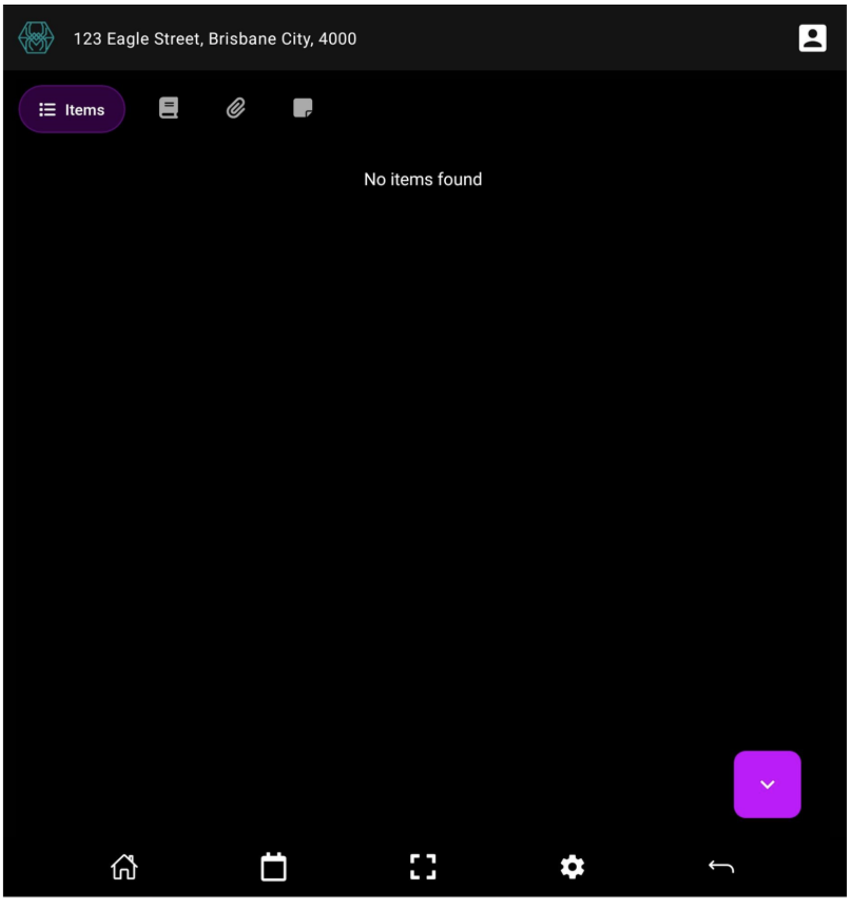
Once a Work Order is created successfully, the user is redirected to the Data Focus Screen, which contains the following tabs:

- Items
- Details
- Attachments
- Notes

Each tab allows you to view, add, or modify information relevant to the Work Order.

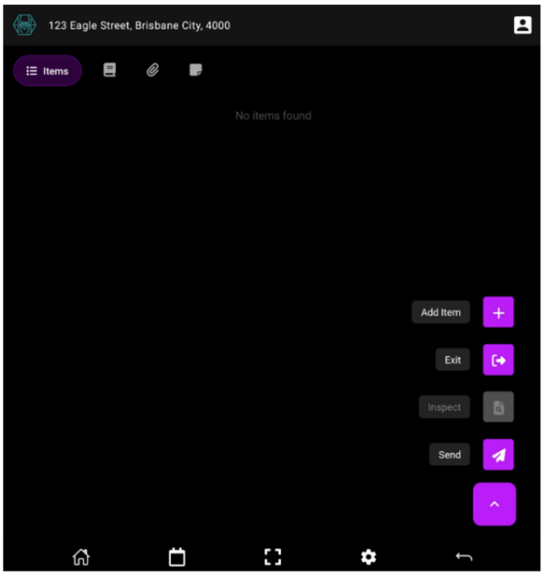
Items Tab

- Open the Items Tab to review or add line items.
- Use the floating arrow (bottom right of the screen) to access actions:
    - Add Item – create a new item and enter details.
    - Exit – return to the Work Orders list.
    - Inspect – review the item in detail.
    - Send – send the item(s) or Work Order as required.



Add Item Tab

1. Click "Add Item +"
    - Opens a new screen to enter item details.
2. Fill out fields (as required by your organisation):
    - Item
    - Location
    - Quantity (Qty)
    - Unit of Measure (UOM)
    - Keywords
    - Comments
    - Allocated To
    - Due Date
    - Scheduled Start
    - Purchase Order #
    - Unit Cost / Cost
    - Unit Sell / Sell
    - Liability Type
    - Liability %



3. Save Options:
    - Save & Add – keeps you in the Add Items area to continue adding multiple items.
        - Each saved item will appear at the bottom of the screen while the entry form clears for the next.
    - Save & Done – adds the item and returns to the main Items list on the Data Screen.
        - Items will display in list order (the list is empty when the Work Order is first created).

Note: The highlighted Items Tab is the first tab by default.
The next tabs left to right are:

- Details
- Attachments
- Notes

Click each tab to view, add, or modify information for the Work Order.

Viewing and Managing Items

- Once items are added, they will display in the Items list on the Data Screen.
- Tap an item to:
  - View details
  - Modify information (as permitted by your organisation)
  - Add an Attachment (documents, images, or files linked to the item)

Attachments added within an item will also appear under the Attachments Tab of the Work Order for a complete record.

Mobile App | Work Order – Add Attachment to an Item

1. Select an item from the Items list on the Data Screen.
2. Scroll to the bottom of the item screen and tap + Add Attachment.
3. The overlay window opens to complete fields:
   - Attachment Type
   - Title
   - Attachment Status
   - Can be Viewed by External Users? (Client or Contractor, if enabled by your organisation)
4. The attachment list appears under + Add Attachment.
   - Tap the arrow on the right to access the add menu.
   - Tap + to select:
     - Take a New Photo
     - Choose a Photo
     - Choose a File
5. Tap Save & Done when complete.

Attachments added within an item will also appear under the Attachments tab of the Work Order.

Work Order – Details Tab

- The **Details tab** automatically flows through information from the Work Order creation.
- To modify, tap **View** in each section.
- Make updates and tap **Save**.
- ⚠️ If the **Save button is greyed out**, there are no changes to save; the details are already up to date.

Work Order – Attachments Tab

- Tap the Attachments tab to view all attachments at the Work Order level.
- Tap the floating "+" button to add new attachments.
- Choose whether the attachment "Can be Viewed by External Users?" (if enabled).
- Once added, attachments can be:
  - Listed and grouped
  - Searched, sorted, and filtered

Mobile App | Work Order – Notes Tab

1. Tap the Notes tab.
2. Tap the floating "+" button to add a new note.
3. Complete the note form:
   - Category
   - Alert Type
   - Comments
   - Note Status
   - Can be Viewed by External Users? (if enabled by your organisation)
4. Tap Save & Done when complete.

Mobile App | Existing Work Orders

1. From the List of Work Orders, tap a Work Order to open.
2. The Work Order opens by default into the Data Screen with tabs for:
   - Items – Review or add items
   - Details – Review or add:
     - Location
     - Details
     - Dates
     - Contacts
     - Flags
     - Settings
     - Record Metadata
     - Tap View on each section to edit as needed
   - Attachments – Review or add documents/images
   - Notes – Review or add alerts/general information

⚠️ Remember:

- Select **"Can be Viewed by External Users?"** for attachments and notes if required.
- If this option is not visible, check with your **System Administrator** to configure it.

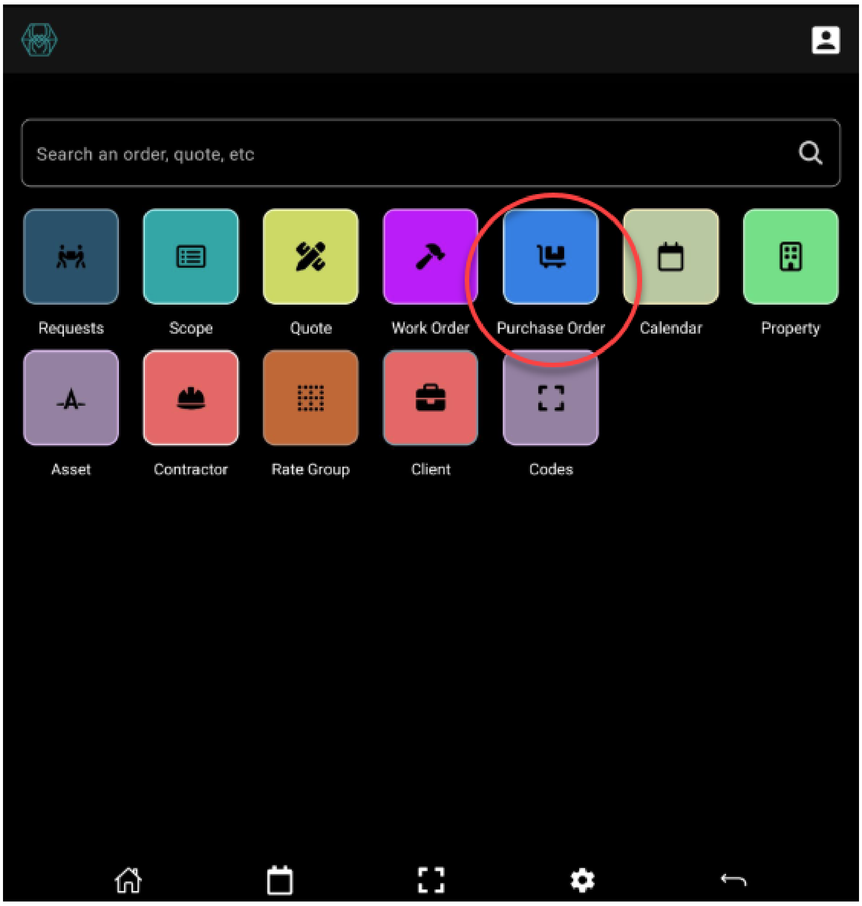
Handy Hints

- Back arrows (top left or bottom right of the screen) allow you to go back one screen at a time.
- Home icon (bottom left) returns you to the Home Dashboard.

Mobile App | Purchase Order

Purchase Orders (POs) in SpyderFlow track approved spend for each Work Order.

- Creation: POs are automatically created when Work Order Items are created.
- Access:
    - From Mobile Dashboard → Tap Purchase Orders
    - Or inside an associated Work Order
- Default View: Opens into the List of Purchase Orders.



Mobile App | List of Purchase Orders

The List of Purchase Orders provides a centralised view to manage, search, and modify POs.

Viewing and Selecting POs

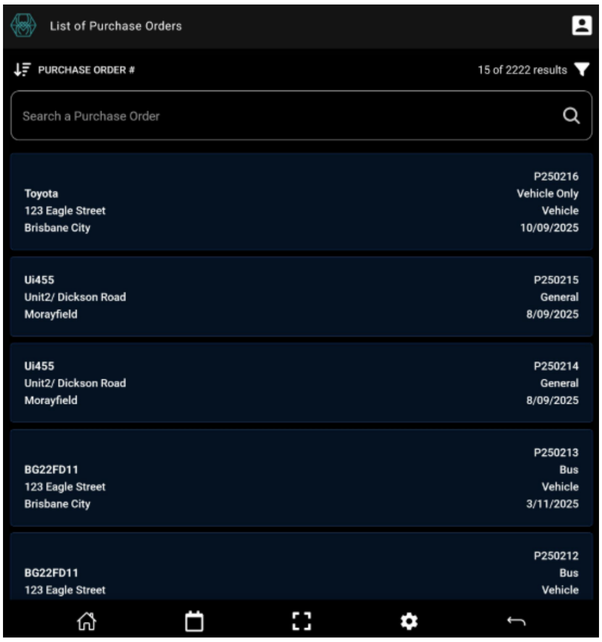
- Scroll up and down the list to view available POs.
- Tap a PO to:
  - View details
  - Add information
  - Modify as permitted by your organisation

Bulk Selection

- Press and hold a PO to activate bulk selection mode.
- Select multiple POs to perform actions such as Cancel.
- A confirmation pop-up will appear:
  - Yes → Confirm the action
  - No → Cancel and return to the list

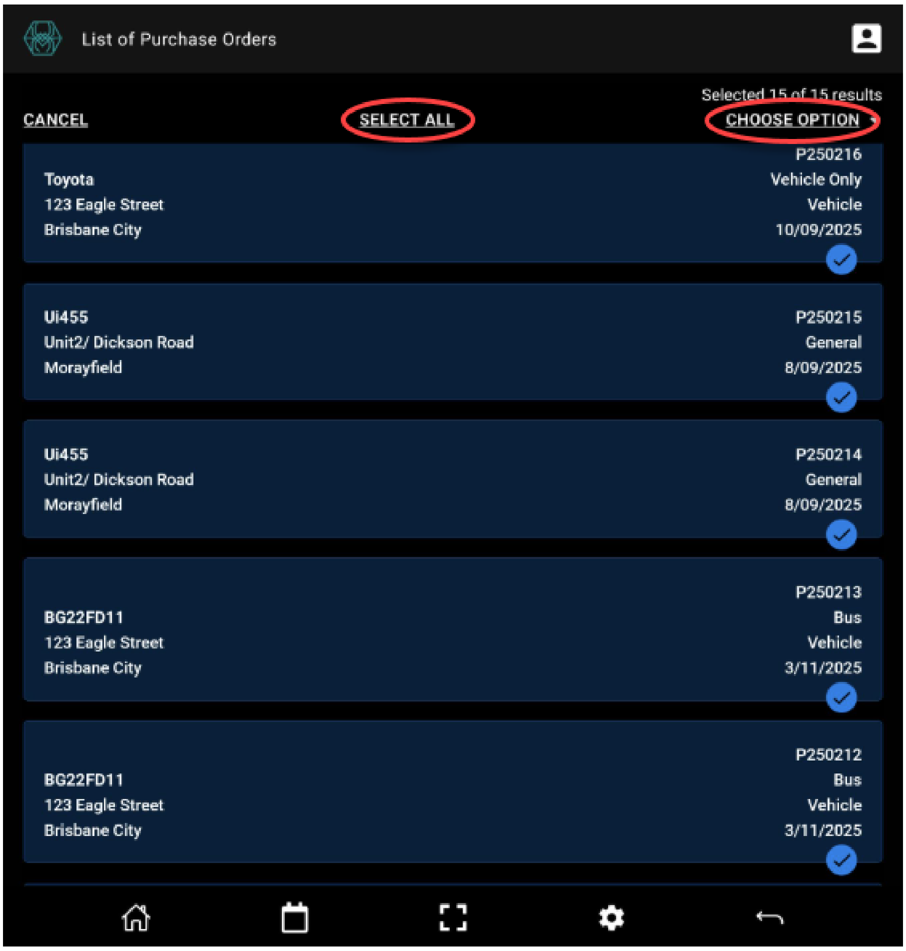
Search, Sort, and Filter

- Use the available search, sort, and filter options to quickly find specific POs by:
  - PO number
  - Property/Asset
  - Status
  - Other relevant criteria



Mobile App | Purchase Orders – Bulk Actions

1. Press and hold on any Purchase Order in the list to activate bulk selection mode.
2. Tap Select All to highlight all Purchase Orders in the list.
3. Tap Choose Option to see available actions.
4. Select Cancel to cancel all selected POs as a bulk action.
5. A confirmation pop-up will appear:
    - Yes → Confirms the cancellation of all selected POs
    - No → Cancels the action and returns to the list



Mobile App | Purchase Order – Data Focus Page

When a Purchase Order is selected from the List of Purchase Orders, it opens into the Data Focus Page with tabs across the top:

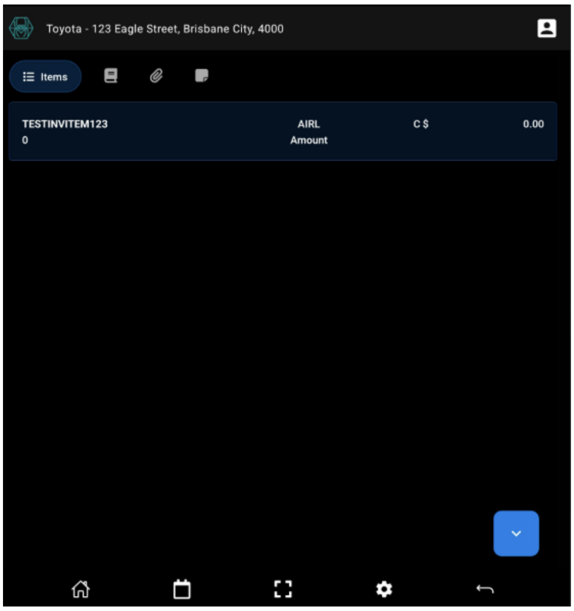
- Items
- Details
- Attachments
- Notes

Items Tab

1. View Existing Items
    - The Items tab displays all existing items within the Purchase Order.
2. Floating Arrow Menu (Bottom of Screen)
   Tap the floating arrow to reveal the action menu:
    - Add Item – Opens a blank form to enter item details.
        - Save & Add – Keeps you in the form to add multiple items.
        - Save & Done – Saves the item and returns to the Items list.
    - Exit – Returns to the List of Purchase Orders.
    - Inspect – Lists items with options to view item details or add attachments.
        - ⚠️ Cannot directly review (tick/cross) in this window; an error message will display if attempted.
    - Send – Notifies the contractor of updates or changes in the Purchase Order.

The Data Focus Page provides full management of a Purchase Order through its tabs:

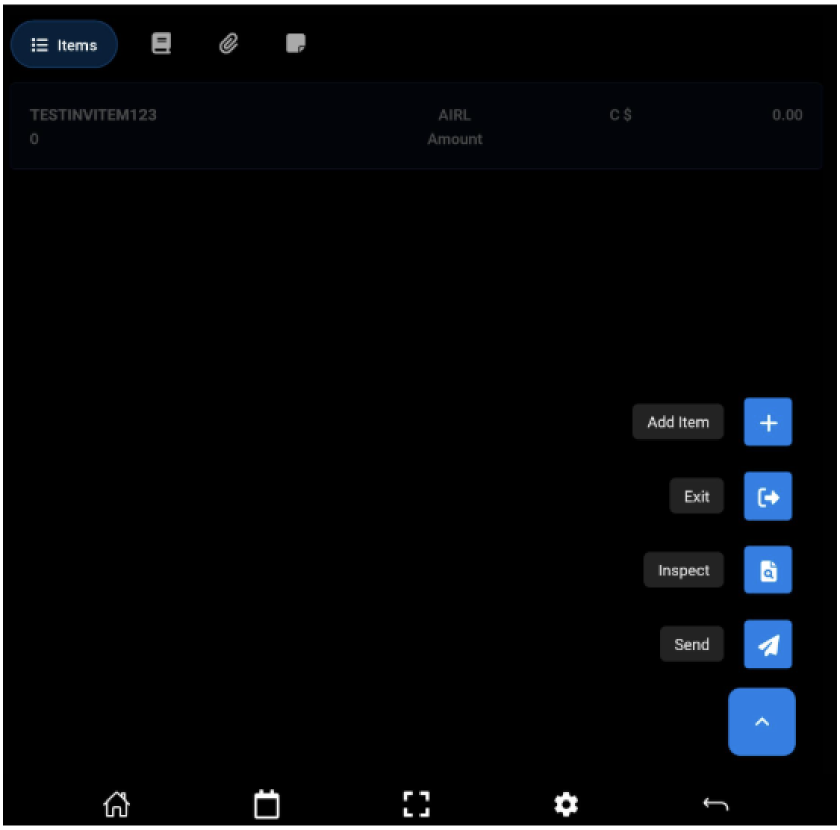
- Items – Add, review, inspect, or send items
- Details – Review or edit Purchase Order information
- Attachments – Add or view documents/images
- Notes – Add or view notes relevant to the Purchase Order



Purchase Order – Items Tab Menu

When in the Items tab of a Purchase Order, tap the floating arrow at the bottom of the screen to access the menu:

- Add Item – Opens a blank form to add new item details.
- Exit – Returns to the List of Purchase Orders.
- Inspect – View item details and add attachments.
    - ⚠️ ***Direct review (tick/cross) is not allowed in this window; an error message will display if attempted.***
- Send – Notifies the contractor of updates or changes in the Purchase Order.

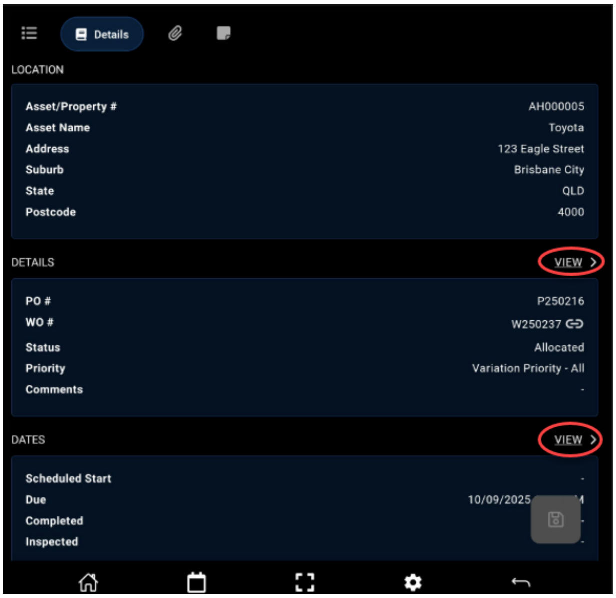


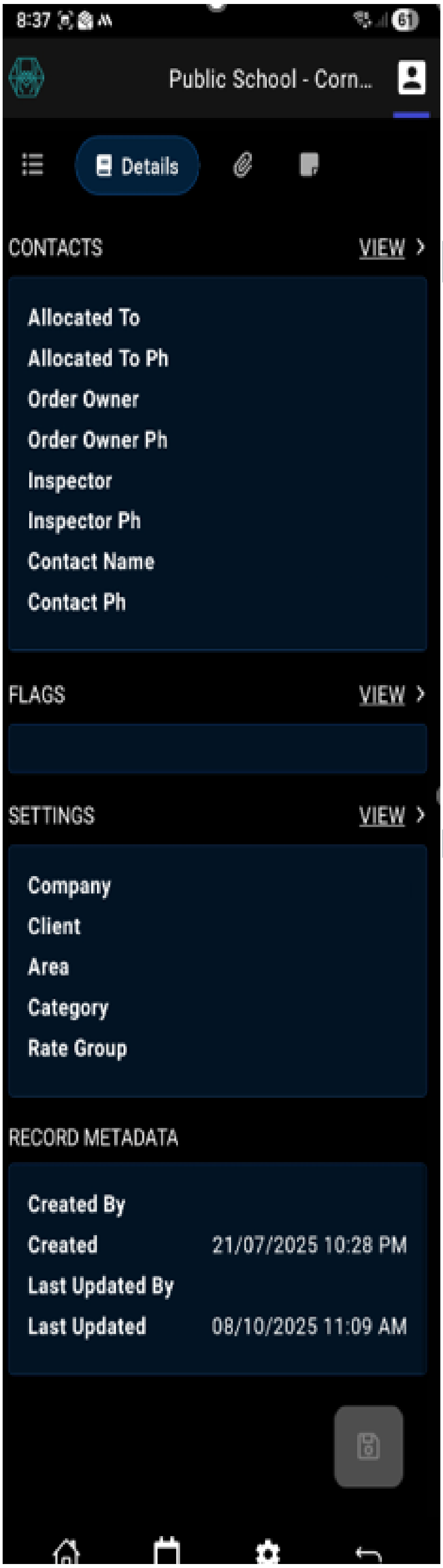
Purchase Order – Details Tab

- Location: Second tab from the left on the Data Focus Page.
- Opens the Purchase Order Details page, displayed in a tile layout for easy viewing.

Sections Displayed:

- Location
- Details
- Dates
- Contacts
- Flags
- Settings
- Record Metadata
- Each section that can be modified includes a View option.
    - Tap View to enter Edit mode (as permitted by your organisation).
- After making changes, tap Save to apply updates.





Contacts:
Click **View** to see all the details of the person who sent you the purchase order.

Flags:
View any flags attached to a job, such as **"Dog on-site"**, **"Two-person job"**, or other important notes that contractors need to be aware of before attending the property.

Settings:
Review all details in this section, including **contractor information**, **client details**, and the **service area**.
Also check that you are assigned to the **correct rate group** to ensure accurate billing and compliance.

Record Metadata:
This section shows **when the purchase order was created and the exact date**.
It's useful for identifying whether a new purchase order has been issued for a job you're already working on, helping prevent any double-ups or confusion between multiple work orders.

Purchase Order – Attachments Tab

- Position: Third tab from the left on the Data Focus Page.
- Attachments can be searched, sorted, and filtered once added.

To Add an Attachment:

1. Tap the floating "+" button.
2. Complete the attachment form:
    - Attachment Type
    - Title
    - Attachment Status
    - Can be Viewed by External Users? (if enabled by your organisation)
3. Each attachment opens into its own Data Focus Page with tabs:
    - Photos – Tap floating "+" to Take a New Photo or Choose a Photo
    - Documents – Tap floating "+" to Choose a File
    - Details – Displayed in a tile layout with a clickable View option to edit or modify details as permitted by your organisation
4. After adding, the attachment title appears in the list format under the Attachments tab.
5. Tap an attachment to modify or add further as needed.
6. Tap Save when complete.

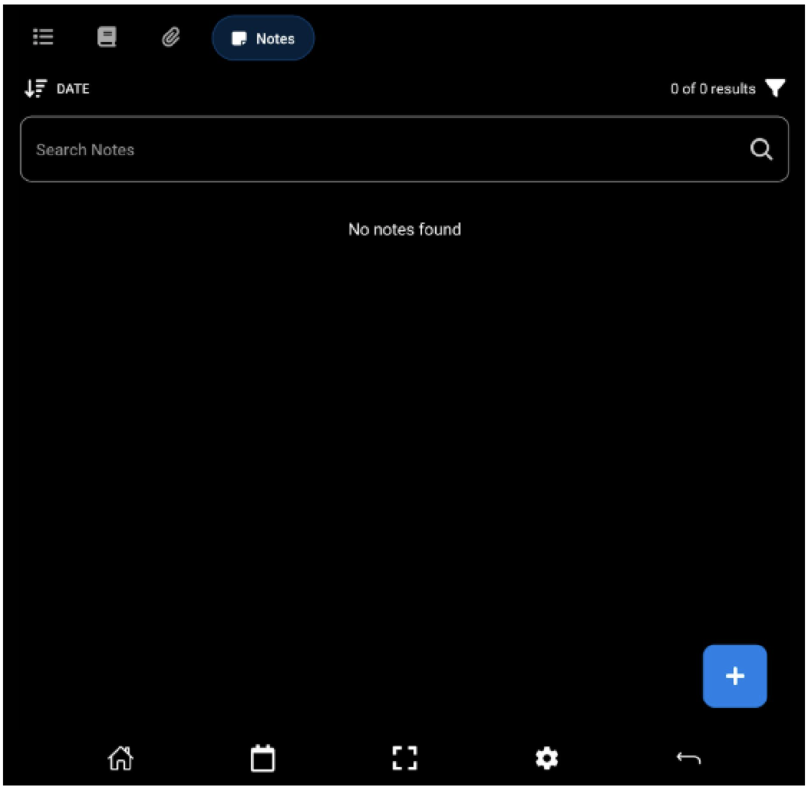
Example: An attachment may be listed with 0 photos, documents, or files uploaded until items are added.

Purchase Order – Notes Tab

- **Position:** Last (fourth) tab from the left on the Data Focus Page.
- Notes can be **searched, sorted, and filtered** once added.
- Like attachments, you can select **"Can be visible to External Users?"** as you create the note.

To Add a Note:

1. Tap the floating "+" button.
2. Complete the note form:
   - Category
   - Alert Type
   - Comments
   - Status
   - Can be Viewed by External Users? (if enabled by your organisation)
3. Tap Save & Done when complete.
4. The note will appear in the list under the Notes tab.
5. Tap an existing note to edit or modify it, as permitted by your organisation.

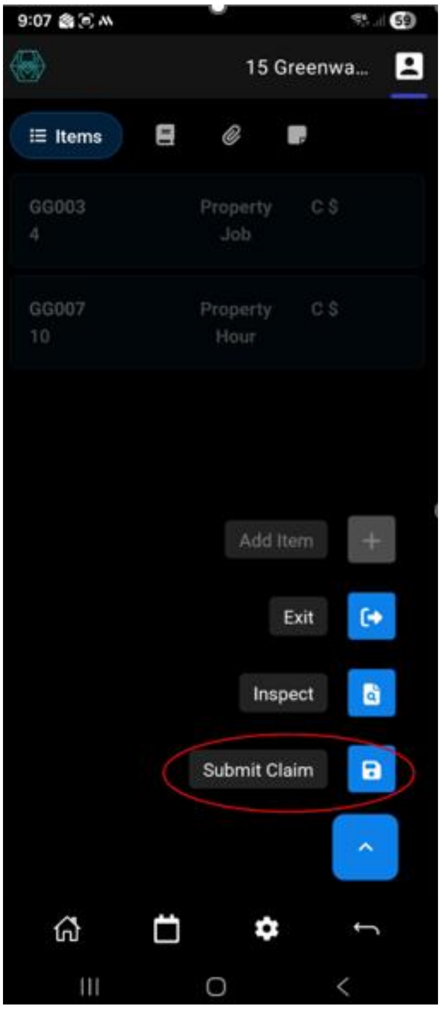


How to Submit a Claim on a Finished Purchase Order

When you have completed a purchase order, you can submit the claim immediately while still on-site.

Submitting the claim in real time provides several benefits:

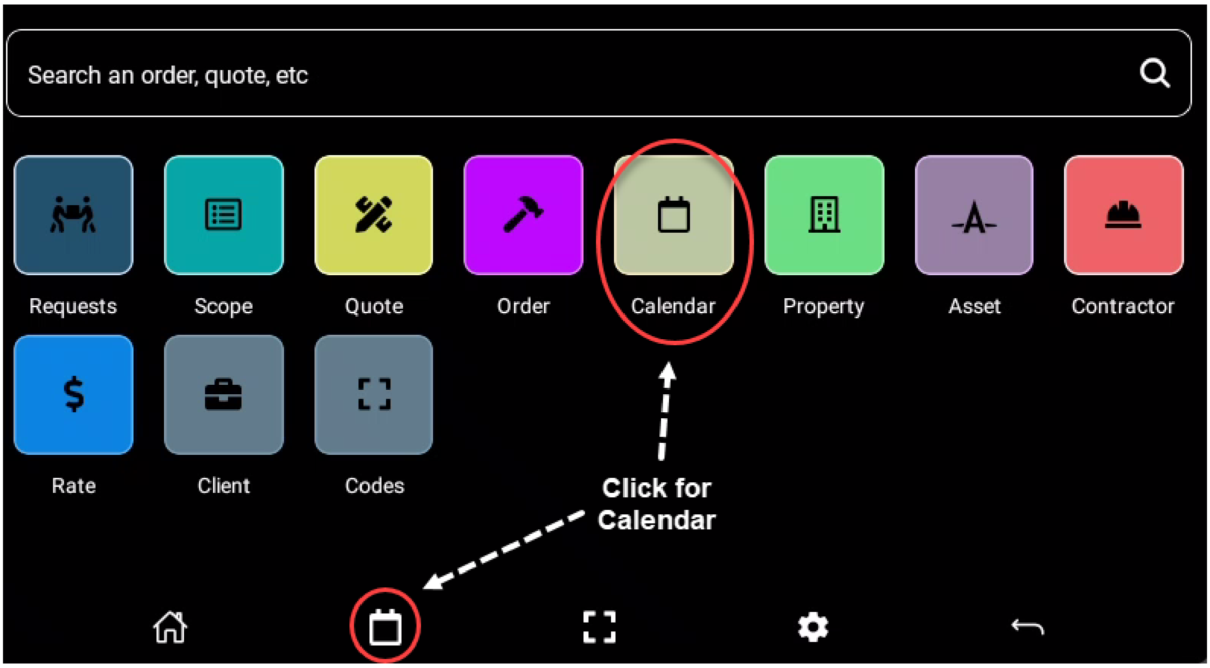
- It **time-stamps** the exact date and time the job was completed.
- It allows the **Response Coordinator** to close the job promptly on their end.
- It streamlines workflow and prevents delays.
- And most importantly, **it helps you as the contractor get paid on time**.



Mobile App | Calendar

Getting Started with Calendar

- Location:
  - Home screen of the SpyderFlow Mobile App (icon format, color-coded with other workflow icons).
  - Accessible from the bottom toolbar, next to the Home button.
- Purpose:
  - The Calendar provides a centralised view for organising events, scheduling tasks, and coordinating activities across your workflows.



Mobile App | Calendar – Features

The Calendar in SpyderFlow allows you to create, view, modify, and share events efficiently.

Key Features:

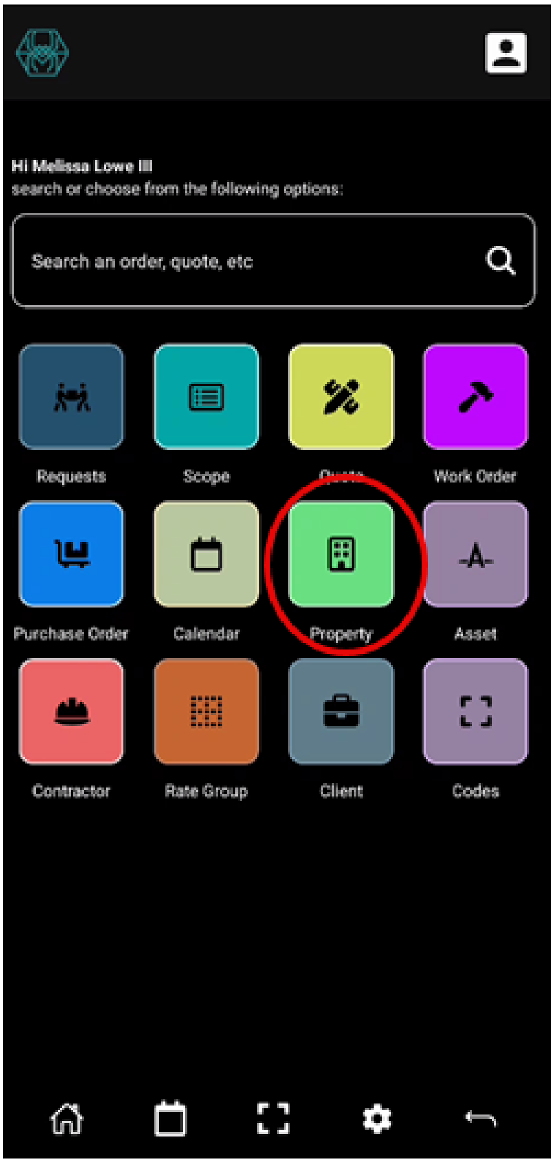
- Month View:
  - Displays the current month with dates.
  - Dates with scheduled activity are marked for quick reference.
  - The selected date is highlighted and matches the list of events displayed below the calendar.
- Event List:
  - Scrollable list of events for the selected date, allowing easy access to day-to-day activities.
- Event Links:
  - Events can be linked to Work Orders, Scopes, or Quotes, providing quick access to relevant workflow items.
- Create & Modify:
  - Add new events, edit existing ones, or share events with relevant team members directly from the calendar interface.

Mobile App | Property

Overview

A Property in SpyderFlow represents a physical asset that workflows are associated with.

- Each property record provides a comprehensive view of all activity undertaken, showing the complete work history.
- The Property button is color-coded like other workflow icons for easy recognition on the Dashboard.
- Default View: Selecting the Property button opens the List of Properties.



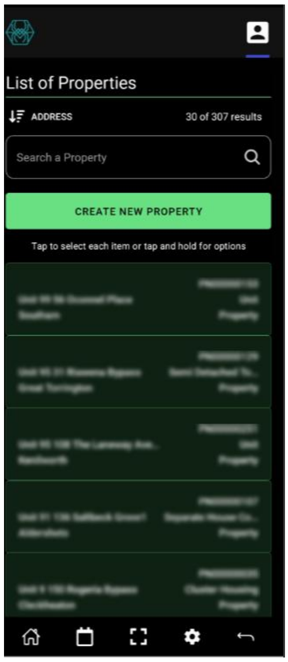
Mobile App | List of Properties

The List of Properties provides a centralised view to manage, search, and access property records.

Layout and Navigation

- SpyderTech logo: Left side of the screen.
- User Profile: Top right of the screen.
- Property List: Displays all properties.
    - Tap a property to view details.
    - Tap and Hold to access additional options.

Sorting, Filtering, and Searching



- Properties can be sorted or filtered according to your chosen criteria.
- On opening, the list displays properties in last listed order by default.
- Use keywords or partial values (alphabetical or numerical) to search for properties.

Create a New Property

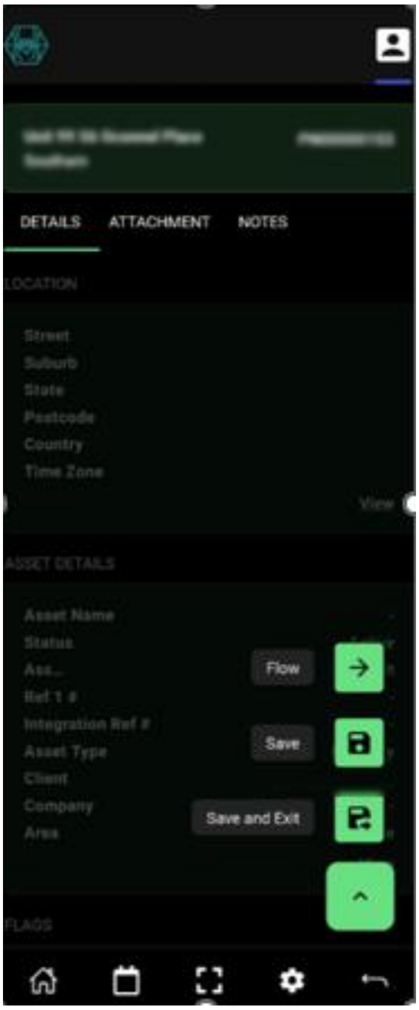
- Tap Create New Property to add a new property.
- Opens the Details window to fill in required fields.
- Tap Save when complete.

Shortcut Buttons (Bottom Toolbar)

- Home – Returns to the Dashboard
- Calendar – Opens Calendar view
- Scan Code – Access QR/Bar code scanning
- Settings Cog – Access app settings
- Back – Returns to the previous screen

Mobile App | Property – Select and View

1. **Selecting Properties:**
   - Tap a property from the List of Properties to view its details.
   - Tap and Hold to access options such as select multiple properties for bulk actions (e.g., Delete).
2. **Property Details & Workflow Integration:**
   - Within a property, you can:
     - View full details
     - Add Attachments (documents, images, files)
     - Add Notes
   - Property records can flow into related workflows:
     - Service Request
     - Scope
     - Quote
     - Work Order
3. **Saving Changes:**
   - Tap Save for each workflow or section to apply updates.
   - Tap Save & Exit to save changes and return to the Dashboard.



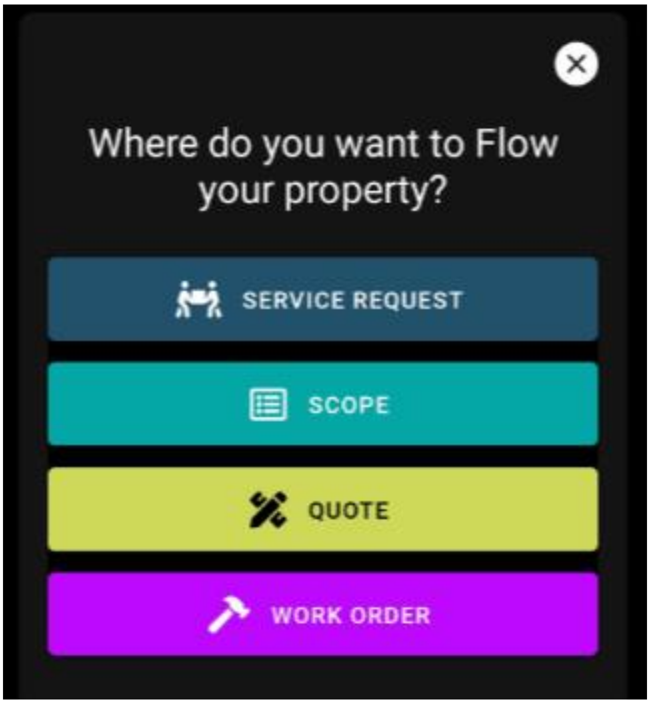
Mobile App | Flow Your Property

Flowing a property allows you to link a property record to associated workflows within SpyderFlow, ensuring all related activities are tracked and managed efficiently.

Steps to Flow a Property:

1. Select a Property from the List of Properties.
2. Access the Property Details screen.
3. Choose the workflow to flow the property into:
   - Service Request – Initiate a new service request for the property.
   - Scope – Begin scoping work for the property.
   - Quote – Create a quote for services related to the property.
   - Work Order – Generate a work order tied to the property.
4. Fill in the required fields for the selected workflow as per your organisation's business process.
5. Save the workflow to link the property.
6. Save & Exit to return to the Dashboard while keeping the property and workflow association intact.

This ensures that all activity for a property is centrally tracked and accessible, providing a complete history and workflow integration.



Mobile App | Asset

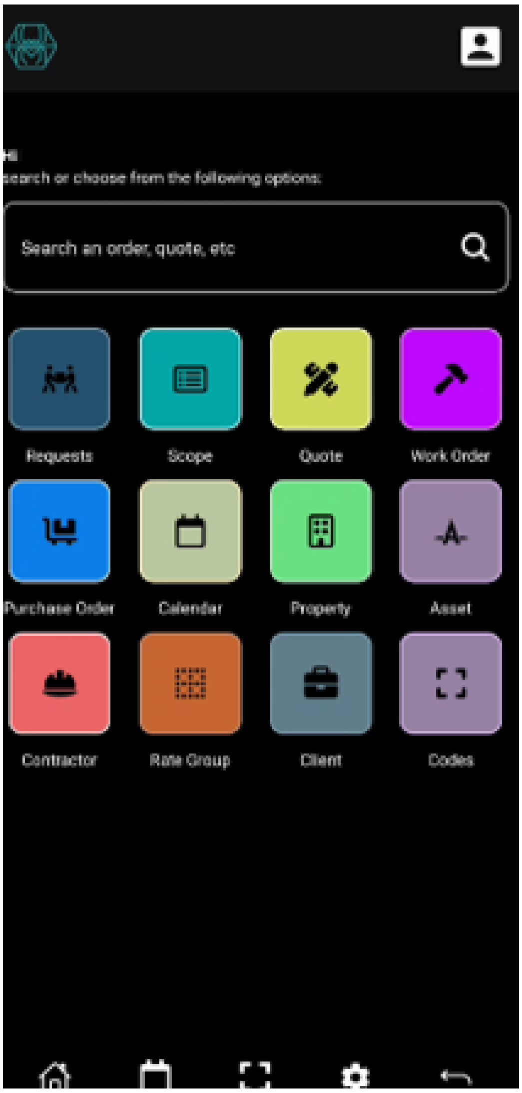
Overview

Assets in SpyderFlow represent important resources for your organisation that workflows are associated with.

- An Asset could be:
  - Motor vehicle
  - Contract
  - Building
  - Equipment
  - Other resources with economic value
- Properties are considered assets but are managed in the Property section.
- Each asset record provides a comprehensive work history, showing all activity associated with that asset.

Navigation

- The Asset icon is available on the Home screen (Mobile Dashboard).
- Color-coded for easy identification.
- Default View: Selecting the Asset icon opens the List of Assets.



Mobile App | List of Assets

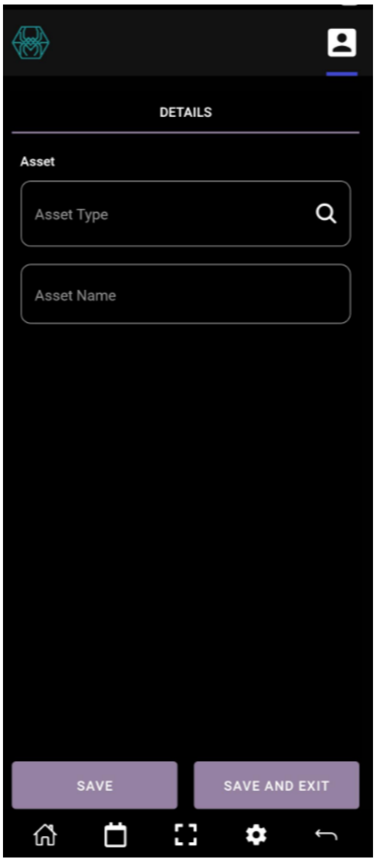
The List of Assets provides a centralised view to manage, search, and access asset records.

Layout and Navigation

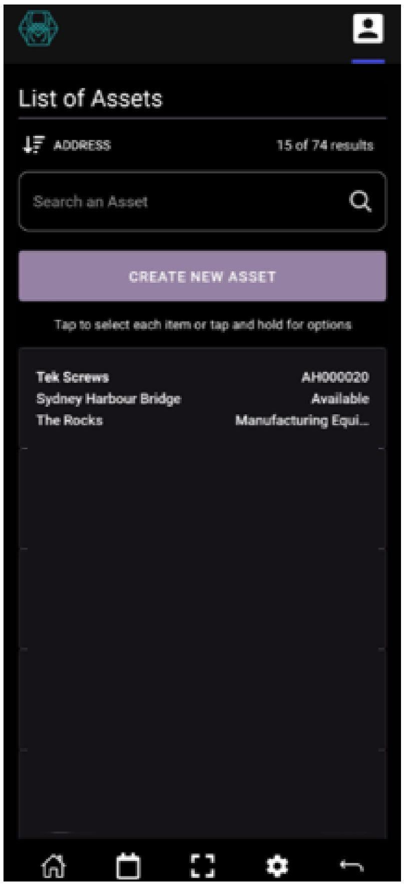
- SpyderTech logo: Left side of the screen
- User Profile: Top right of the screen
- Asset List:
    - Tap an asset to view details
    - Tap and Hold to access bulk options such as select multiple assets or delete

Sorting, Filtering, and Searching

- Assets can be **searched, sorted, and filtered** using keywords or partial alphabetical/numerical values.
- Assets are displayed in **list format**, based on the last applied sort, filter, or addition to the system.



- New window opens when click Create New Asset

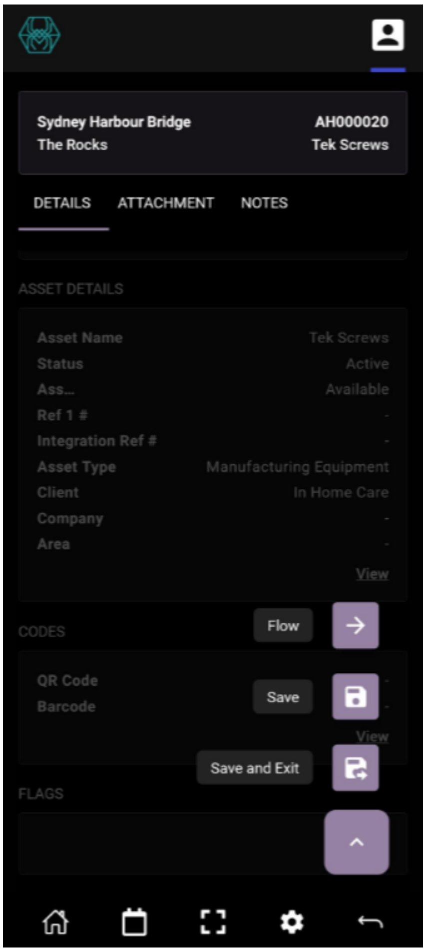


Mobile App | Selected Individual Asset

When an asset is selected from the List of Assets, it opens by default into the Asset Details screen.

Sections Displayed:

- Location
- Asset Details
- Codes
- Flags
- Primary Contact Details
- Details
- Each section includes a View option at the bottom.
  - Tap View to open a new window and add or modify information.
- After adding information, files, or photos, tap Save to apply changes.



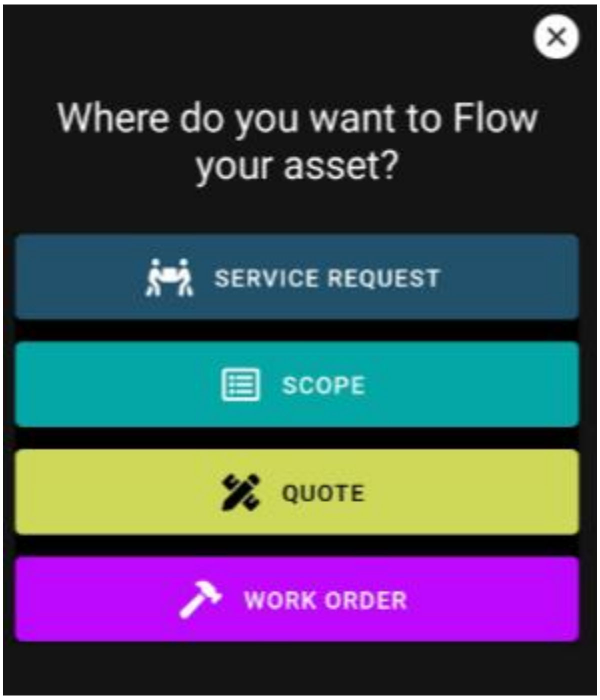
Mobile App | Flow Your Asset

Flowing an asset allows you to link it to related workflows in SpyderFlow, ensuring all activities associated with that asset are tracked.

Steps to Flow an Asset:

1. Select an Asset from the List of Assets.
2. Open the Asset Details screen.
3. Choose the workflow to flow the asset into:
   - Service Request – Initiate a service request for the asset.
   - Scope – Begin scoping work for the asset.
   - Quote – Create a quote for services related to the asset.
   - Work Order – Generate a work order linked to the asset.
4. Complete the required fields for the selected workflow according to your organisation's business process.
5. Save to link the asset to the workflow.

Flowing assets ensures a centralised record of activity and full workflow integration for each resource.

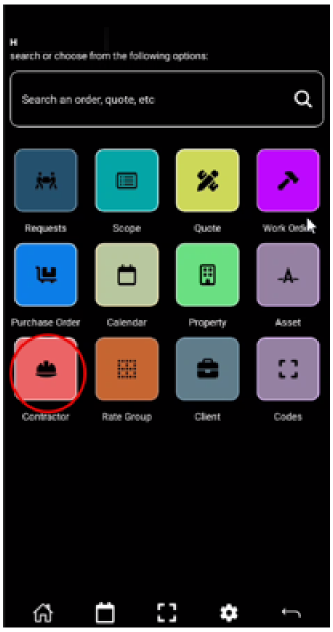


Mobile App | Contractor

Overview

A **Contractor** refers to an external entity who performs work for your organisation but is not a direct employee.

Once contractor information is entered, it can be referenced by workflows in **SpyderFlow**.



- Contractors are also referred to as **External Users**, with restricted access for data security and role-specific functionality.
- Contractors are linked to **Contractor Workers**, who are the individual workers under that contractor entity.

Location: Mobile app → Home screen (Mobile Dashboard)

Contractor Access:

- Contractors can log into SpyderFlow directly to perform data entry (External User role).

User Roles

- Contractor Administrator
  - Manages workers (Contractor Users / Contractor Workers).
- Contractor User
  - Worker role; enters data.
  - Can lock down data for their own workers.
  - Can manage their own Contractor Workers.
  - Supports "Purchase Order" work activities (standard and defect work).

Visual Cue: Contractor icon is colour-coded for easy identification in the mobile app.

List of Contractors

- Default opening page when selecting **Contractor** from the Home screen.
- Functions:
  - Search, sort, and filter (same as other 'List of' pages).
  - **Create New Contractor** button.
  - Tap & Select items, or Tap & Hold for options.
  - Bulk select and **Disable** contractors if required.

Selected Contractor Item

When a Contractor is selected, details can be viewed, added, or modified.

Note: Tap View on each section to edit. Tap Done to save.

Sections include:

- Entity Details
- Service Type
- Entity Address
- Postal Address
- Entity Contact
- Primary Contact Person
- Director Details
- Licence / Certificate
- Insurance:
    - Workers Compensation
    - Income Protection
    - Specialist Insurance
    - Other

Attachments

- Add photos or files.
- Attachments can be searched, sorted, and filtered.

Notes

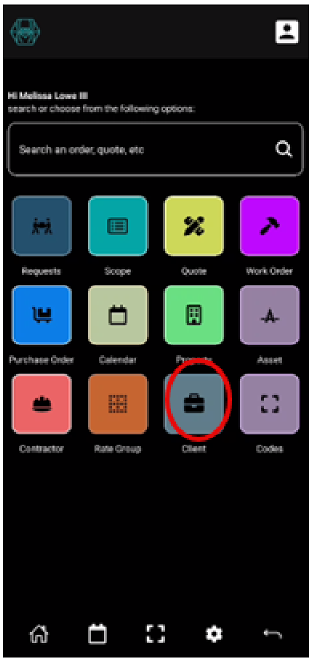
Notes can be added with:

- Category
- Alert Type
- Comments
- Status
- Can be viewed by External Users? – determines visibility for contractors and/or clients.

Record Level Security

- Information is restricted to what the contractor is configured to see.
- Company restrictions apply.
- Worker-level restrictions can also be applied by the contractor.

Mobile App | Client



Overview

Client information is entered into SpyderFlow to enable different clients to be identified, referenced, and incorporated into workflows as required.

Location: Home screen → Mobile Dashboard icon

List of Clients

- Default opening page when selecting Client.
- Displays all Clients within your SpyderFlow.
- Functions include:
  - Filter, search, and sort in list formats
  - Create New Client (opens a new window to add details by fields)

Client Details

Details can include:

- Client Name
- Business Registration #
- Address details
- Contact details
- Financial details
- Allow Custom Payment Dates (checkbox: ticked or unticked)

These details ensure accurate tracking, communication, scheduling, and billing.

Select, Add, or Modify Clients

To update client details:

1. Select the individual client from the List of Clients screen.
2. Click View at the bottom of each section in details.
3. Make required changes.
4. Click Done.
5. Click Save or Save and Exit.

Attachments

Attachments can be added by:

- Taking a new photo
- Choosing an existing photo
- Choosing a file

When adding attachments, complete or select fields for:

- Title
- Attachment type
- Status
- Can be Viewed by External Users**?** (checkbox)

Notes

Notes can be added to Clients with:

- Category
- Alert type
- Comments
- Status
- Can be Viewed by External Users? (checkbox)

Mobile App | Attachments

Overview

Attachments can be added throughout SpyderFlow to support records with photos, files, and documents.

Attachments are available on:

- Requests
- Scope
- Quote
- Work Order
- Purchase Order
- Property
- Asset
- Contractor
- Client

How to Add an Attachment

1. Navigate to the Attachments tab, or open Item → Add Attachment.
2. Tap the + button (bottom-right of screen).
3. Choose one of the following:
    - Take a photo → Add Title + Attachment Type → Save
    - Choose a photo → Select from device → Save
    - Select a file → Upload → Save
4. Attachment is created and added to the record.

Attachment Details

To view more information:

- Tap and hold the attachment → select More Options → Details.

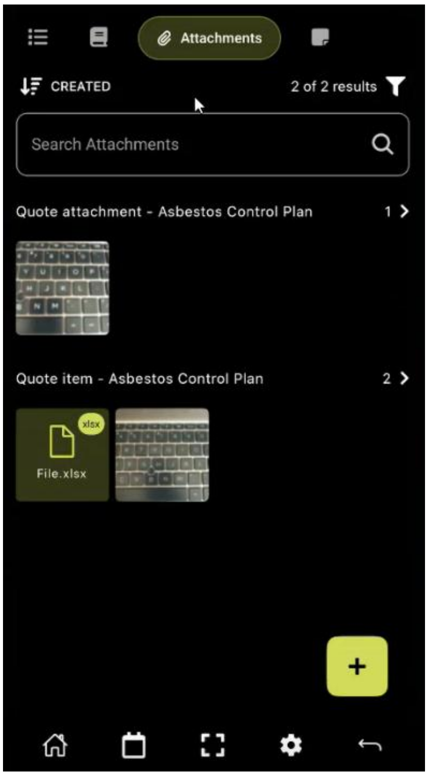
Details include:

- File information (photos or documents)
- Created date and time stamp
- Attachment Categories: Photos / Documents
- Viewed by: option to allow visibility for:
    - Internal users only
    - Internal + External users

⚠️ ***Check with your business process before enabling Can be Viewed by External Users?***

Example

- ***Quote Attachments:***
    - ***Attachments can be added at the Quote level.***
    - ***Attachments can also be linked to individual Quote items.***



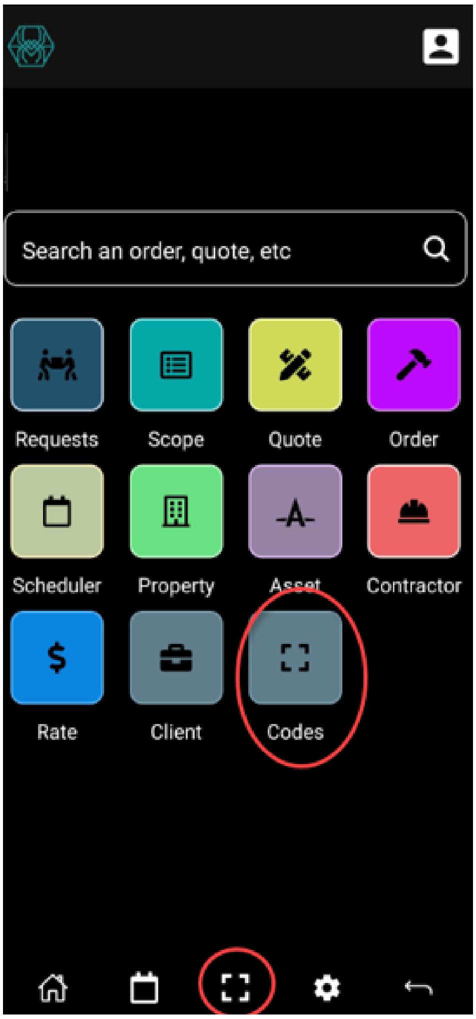
Mobile App | Codes | Scan

Overview

The Scan Codes feature in the SpyderFlow Mobile App makes it easy to identify and update assets by scanning their assigned codes.

How to Scan a Code

1. Open the Codes icon, or tap the Code Scanning option on the bottom toolbar.
2. Click Scan and point your device at the code.
3. The linked Asset will display on your screen.
4. Update asset details as required.
5. Tap Save when complete.



Mobile App | Codes | Generate

The Generate function allows you to create and assign QR Codes to your assets.
Note: *A Manager Role is required to enable QR code generation.*

Generate and Assign QR Codes to Assets

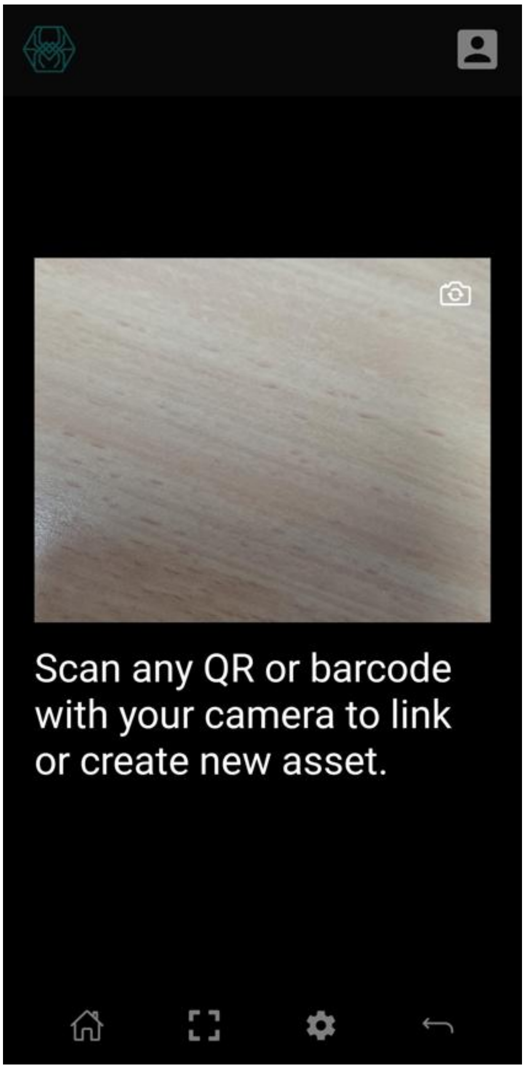
This feature allows quick identification, linking, and retrieval of asset details using QR codes.

Scan Code to Link or View an Asset

1. Tap “Codes” from the mobile app menu.
2. Select Scan QR Code.
3. Point your device at the QR code.

If the Asset is Already Linked

- You will be taken directly to the Asset Details screen associated with that QR code.



If No Asset Is Linked

You will be given two options:

- **Link to Existing Asset**
    - Search and select the correct asset
    - Save to complete the link
- **Create New Asset**
    - Enter the required information
    - Save to finalise the new asset record

Update as Required

After linking or creating the asset, you can update any necessary fields and **Save** when complete.