



User Guide

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Welcome

Welcome to the user guide for the HytechGas application. This document will help to guide users on how to use all of the features of the app. If you are unsure of how to use any features or would like to request access to an account please email:

saul@hytechsolutions.info

Getting Started

Please download the HytechGas app from the relevant store on your device (AppStore for iOS device or Google Play Store for Android device.)

Once downloaded you will need to login with your email address that you used in signing up to use the app. If this is your first time using the app you will need to use your temporary password which you will have received via your email address otherwise login to the app using your password.

If this is your first time logging into the app then you will be required to accept our terms & conditions before using the app for the first time and you will also be prompted to change your temporary password to your own secure password.

When you are logged into the app the first thing that you will be presented with is the Calendar page (Fig.1). The calendar is the central focal point of the HytechGas application, it allows for engineers to see all of their assigned jobs for any given day and provides easy access to their information and a quick map link to view the location of their jobs geographically.

For an admin user, the calendar is the place where they will be able to quickly add jobs and view all jobs for all their engineers.

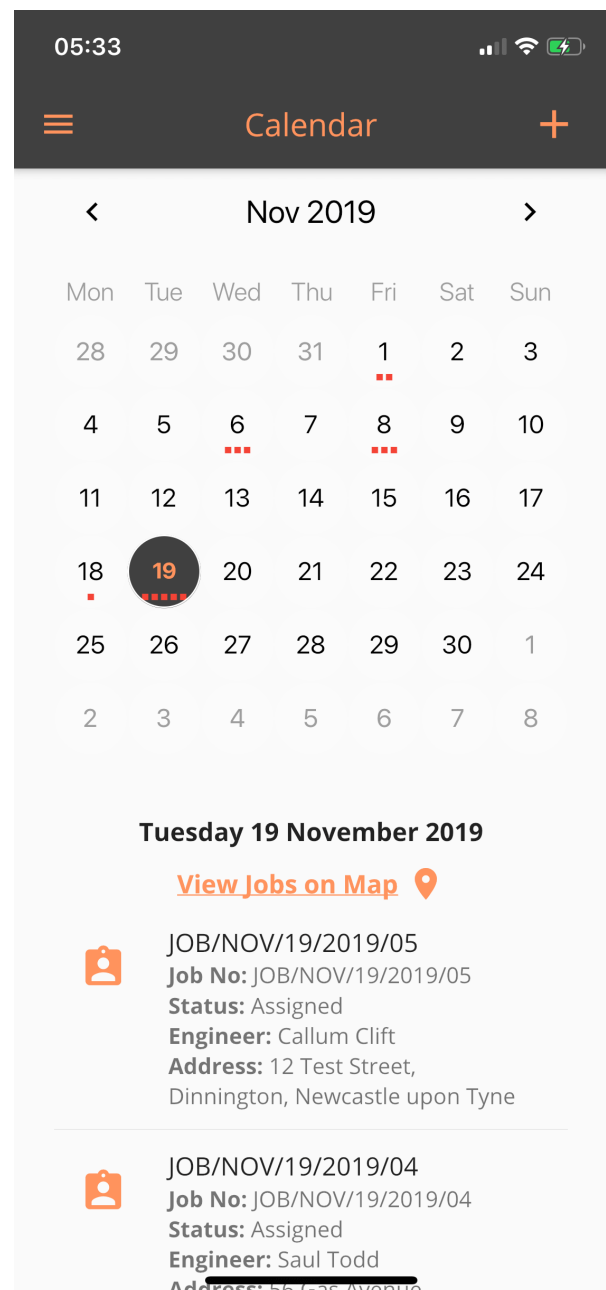


Fig.1 - Calendar

General Navigation

Navigating around the different sections of the HytechGas app can be done so using the side menu (Fig.2):

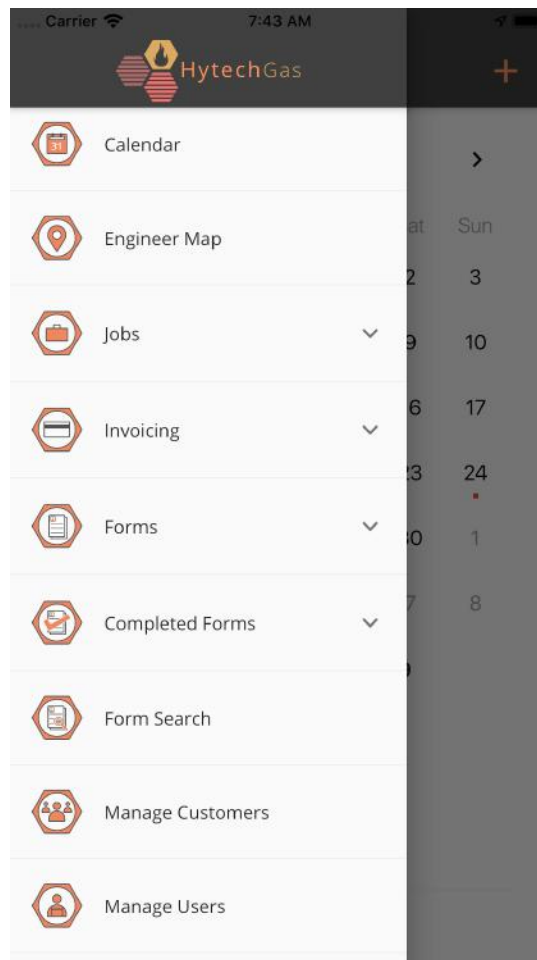


Fig.2 - Side Menu

To navigate back from pages you can use the arrow at the top left of your device screen (Fig.3):

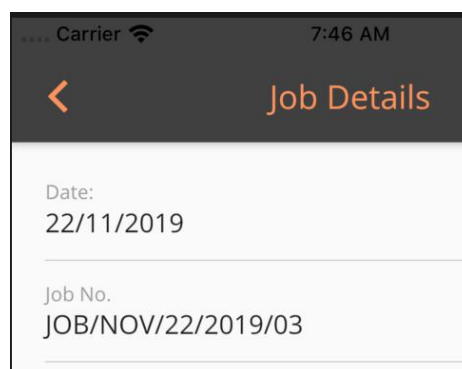


Fig.3 - Back Arrow

Creating Jobs

Creating jobs in the HytechGas app can be done in a couple of ways but the quickest way is to simply tap on the day you wish to create a job for on the calendar and then tap the '+' icon in the top right of the screen.

This will then take you to the 'Raise Job' page of the app. Depending on the day you had selected from the calendar this will pre-populate the day of the job accordingly.

If you already have some customers added to the app database you can start to type their name in the 'Customer' field and you will see any matching customers show in the dropdown menu (Fig.4). Once you select the customer from the menu this will automatically populate the address and contact details of the customer on the job sheet.

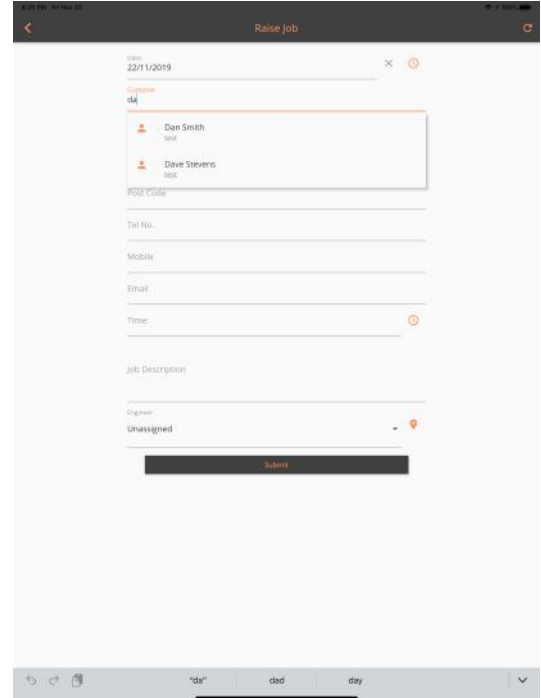


Fig.4 - Auto-populate customer details

When selecting an engineer for the job you can either select an engineer directly from the engineer dropdown or you can tap on the pin icon next to the engineer dropdown which will launch a map view showing the last known location of all of your engineers and from here you can tap on an engineer and assign the job to them (Fig.5).

Once you have completed all of the required information about a job you can submit the job and this will be saved to the online database and added to the jobs map. If the job was assigned to an engineer then that engineer will receive a push notification on their device to let them know that they have been assigned a job and this will not show up in their calendar.

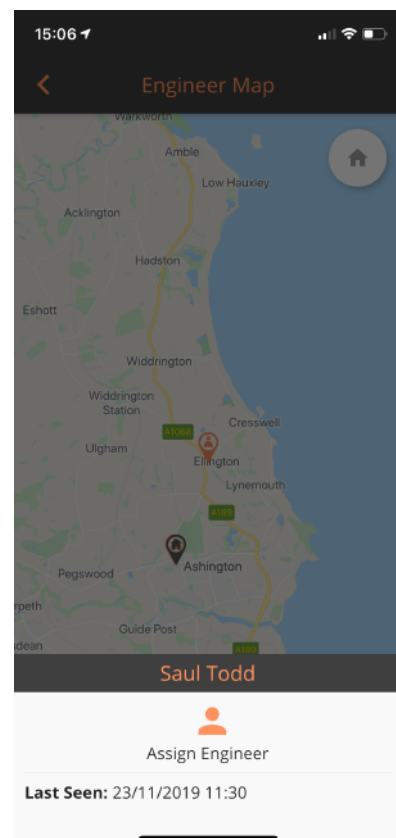


Fig.5 - Assign Engineers by location

Editing Jobs

Jobs can be edited once they have been created so admin users are able to change any required details if needed. To edit a job simply open the job then tap on the three vertical dots on the top right of the screen then tap 'Edit Job' (Fig.6).

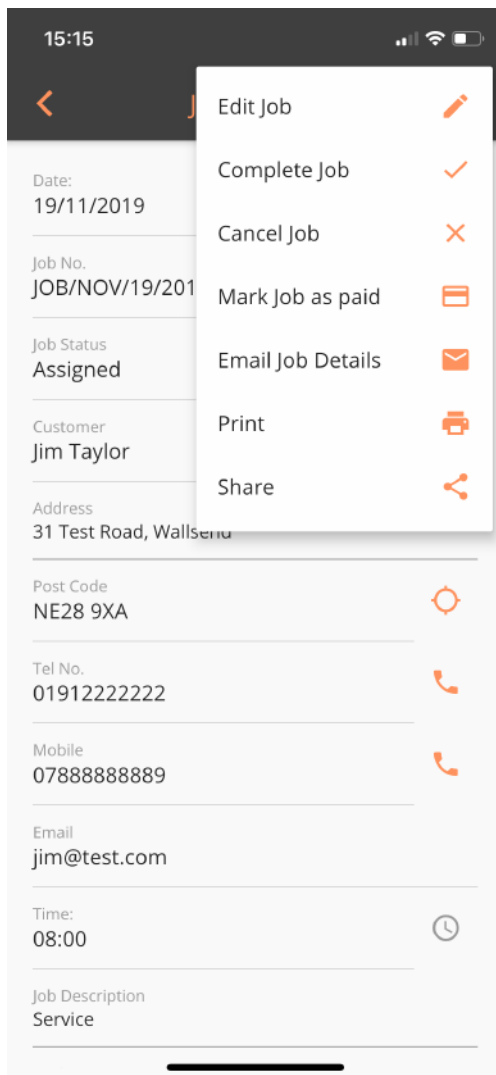


Fig.6 - Edit Job Button

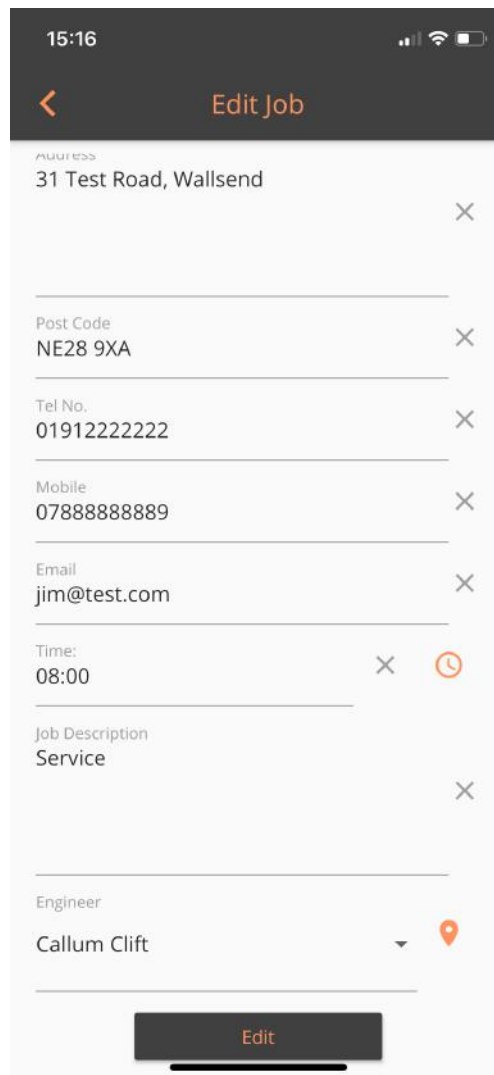


Fig.7 - Edit Job Page

Whilst in edit mode you can make any changes to the job that you want, if you want to cancel the changes simply tap the back button on the top left of the screen. In order to commit the changes you will need to tap the 'Edit' button at the bottom of the screen. If you are re-assigning the job to a different engineer the original engineer in the job will get a push notification to tell them they are not longer assigned to the job and the new engineer will get a notification telling them they are now assigned to the job

Completing Jobs

When a job has been completed you will need to mark that job as completed so that its status will get updated in the jobs database. In order to do this simply open the job, then tap on the three vertical dots on the top right of the screen then tap 'Complete Job.' If the customer has paid for the job you can also chose to 'Mark Job as paid' and this will update its payment status in the jobs database. When a job has been successfully completed the job will show with a green tick icon and its status will show as 'Completed' (Fig.8). When viewing the jobs map any completed jobs will also show with a green pin.

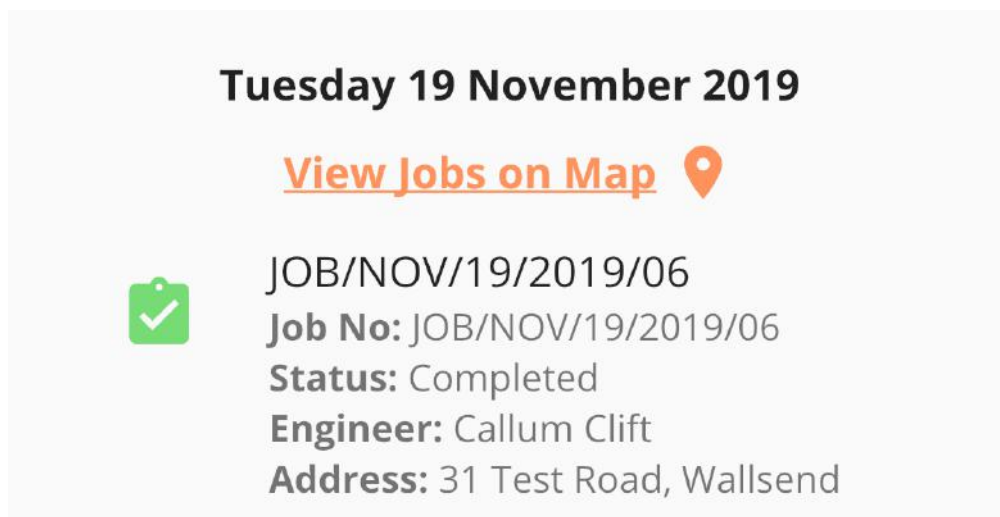


Fig.8 - Completed Job

Cancelling Jobs

If you need to cancel any job you can simply open the job, then tap on the three vertical dots on the top right of the screen then tap 'Cancel Job.' You will then need to provide a reason for cancellation e.g. customer not home, then submit and this will successfully cancel the job (Fig.9).

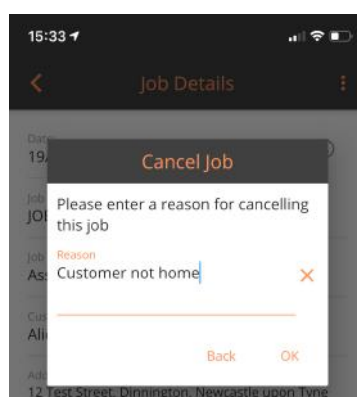


Fig.9 - Cancelling a Job

Jobs Map

Users can view the location of all of their days jobs simply by tapping on any in the calendar then tapping on the orange text 'View Jobs on Map' this will bring up the map view (Fig.10) showing the location of all their jobs marked as individual pins. Note that jobs will only show on the map is they have valid post codes assigned to them otherwise they can be located on the map.

If you tap on any of the job pins this will bring up some options for that job (Fig.11), you can perform one of the following options:

- View the details of the job and subsequently perform any actions such as edit or complete the job
- Call the customer using the contact details assigned to the job
- Get directions to the job using either Apple Maps (iOS) or Google Maps (Android)



Fig.10 - Jobs Map

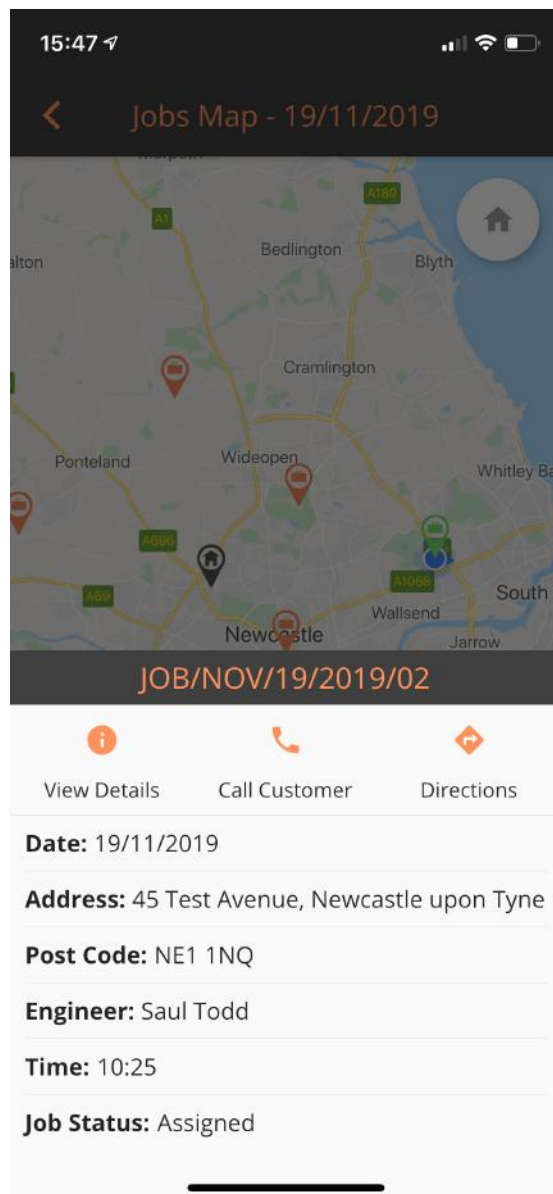


Fig.11 - Job Options

Engineer Map

Admin users can view the location of all of their engineers simply by opening the 'Engineer Map' page. This will bring up the map view (Fig.12) showing the location of all their engineers marked as individual pins.

If you tap on any of the pins this will bring up some options for that engineer (Fig.13). You can either:

- Assign a job to the engineer
- View their jobs for the current day
- Call the engineer



Fig.12 - Engineer Map

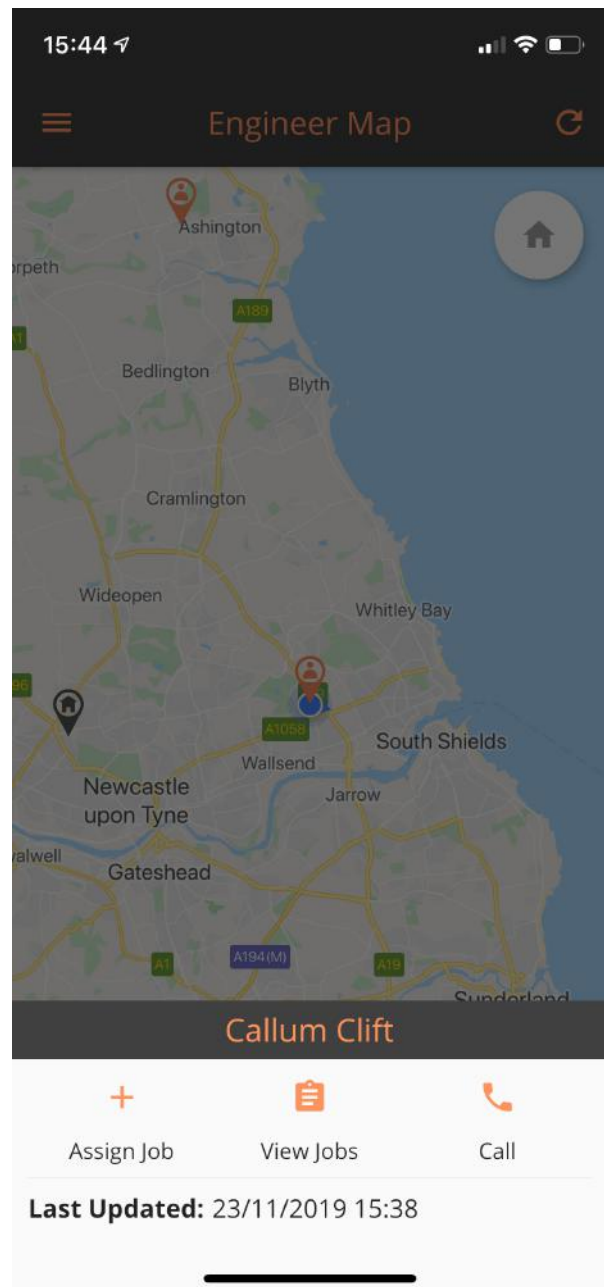
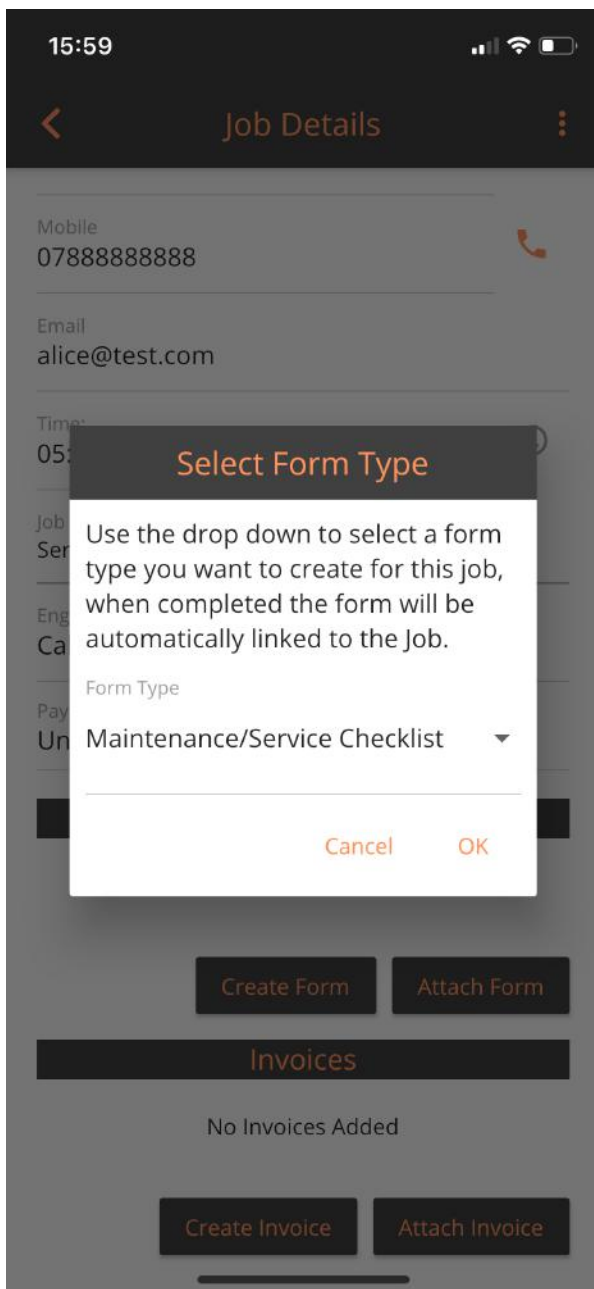


Fig.13 - Engineer Options

Creating Forms

When using the HytechGas engineers can create forms in two ways. HytechGas allows for users to directly link any forms to corresponding jobs, in order to link a form to a job an engineer simply needs to open the job they are currently working on and tap on the 'Create Form' option. From there the engineer will need to choose which form they wish to create (Fig.14). Once an engineer has selected a form this will open up that relevant form and in cases where its permitted some of the information on the form will be auto-populated with the matching customer details from the job (Fig.15).



15:59

Job Details

Mobile
07888888888

Email
alice@test.com

Time
05:00

Job
Ser

Eng
Ca

Pay
Un

Select Form Type

Use the drop down to select a form type you want to create for this job, when completed the form will be automatically linked to the Job.

Form Type
Maintenance/Service Checklist

Cancel OK

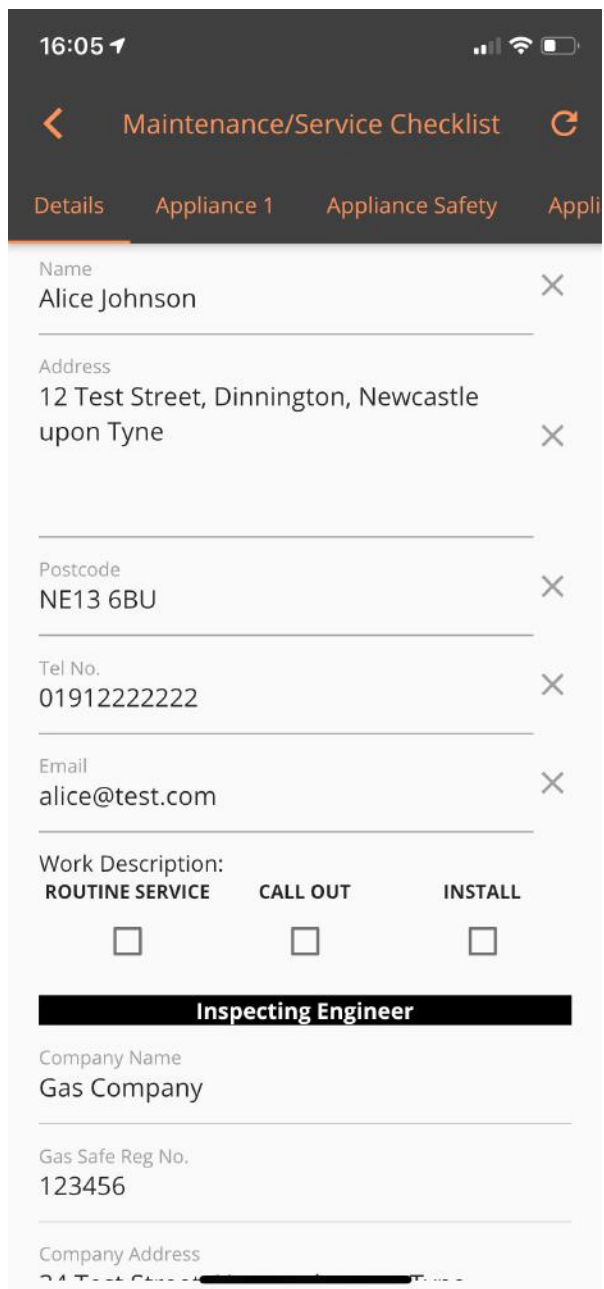
Create Form Attach Form

Invoices

No Invoices Added

Create Invoice Attach Invoice

Fig.14 - Selecting a Form



16:05

Maintenance/Service Checklist

Details Appliance 1 Appliance Safety Appli

Name
Alice Johnson

Address
12 Test Street, Dinnington, Newcastle upon Tyne

Postcode
NE13 6BU

Tel No.
01912222222

Email
alice@test.com

Work Description:
ROUTINE SERVICE CALL OUT INSTALL

☐ ☐ ☐

Inspecting Engineer

Company Name
Gas Company

Gas Safe Reg No.
123456

Company Address
24 Test Street, Newcastle upon Tyne

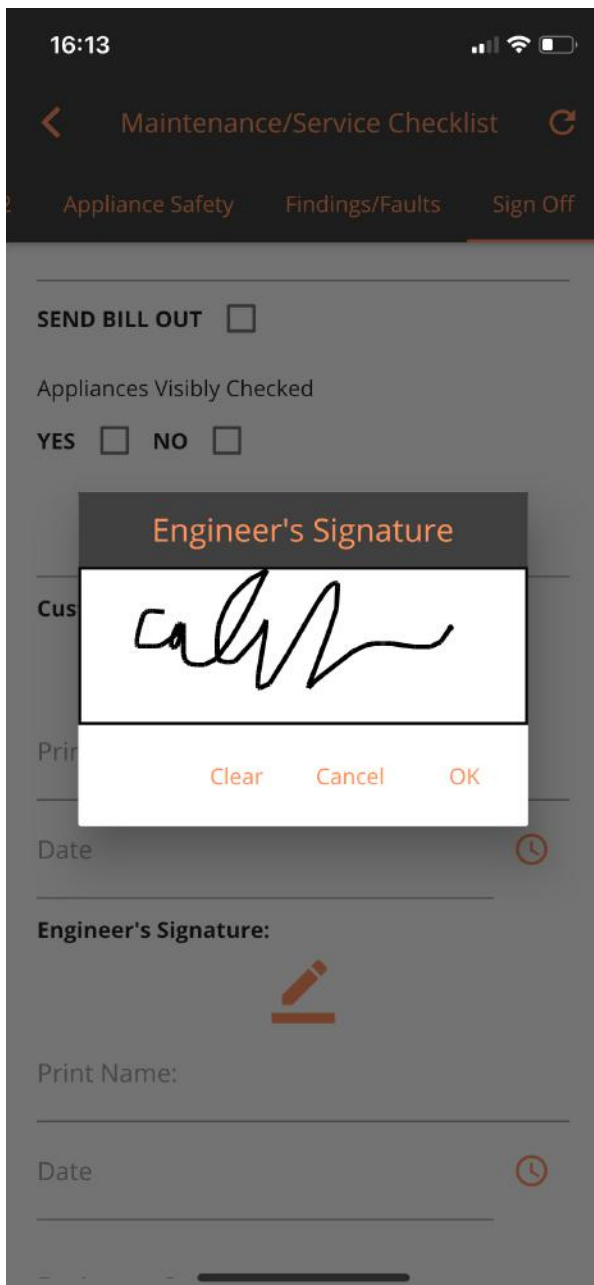
Fig.15 - Pre-populated Information on Maintenance Checklist

When filling out a form engineers can navigate through the form by swiping up and down the page and in instances where forms contain more than one section users can simply swipe right or left or tab the tabs along the top of the form.

Some forms in the app require digital signature (Fig.16) which can be performed using your finger or a smart pen that is compatible with your device.

After forms have been completed they can be found attached to the job (if the form was created from the job (Fig.17)) or they can be located in the 'Completed Forms' section.

Some forms contain fields for a customer address, if this field has been filled in then the customer will receive a PDF copy of the form sent to their email address.



16:13

< Maintenance/Service Checklist >

Appliance Safety Findings/Faults Sign Off

SEND BILL OUT ☐

Appliances Visibly Checked

YES ☐ NO ☐

Engineer's Signature

Cus

Print

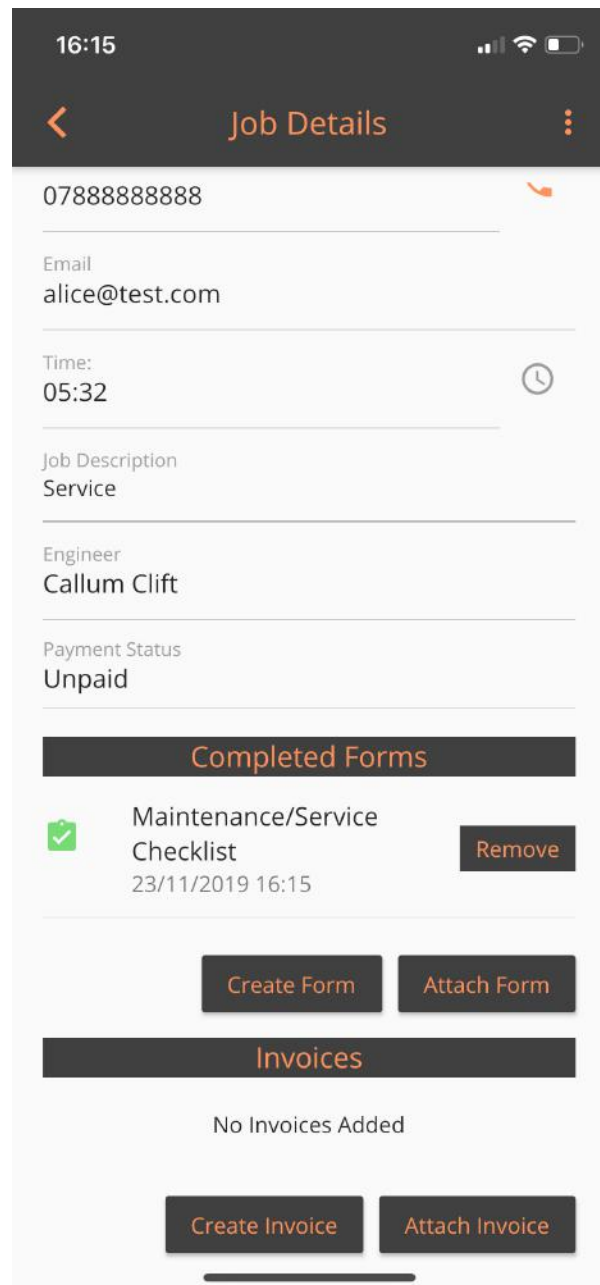
Date

Engineer's Signature:

Print Name:

Date

Fig.16 - Digital Signature



16:15

< Job Details >

0788888888

Email
alice@test.com

Time:
05:32

Job Description
Service

Engineer
Callum Clift

Payment Status
Unpaid

Completed Forms

Maintenance/Service Checklist
23/11/2019 16:15

Create Form Attach Form

Invoices

No Invoices Added

Create Invoice Attach Invoice

Fig.17 - Completed Form

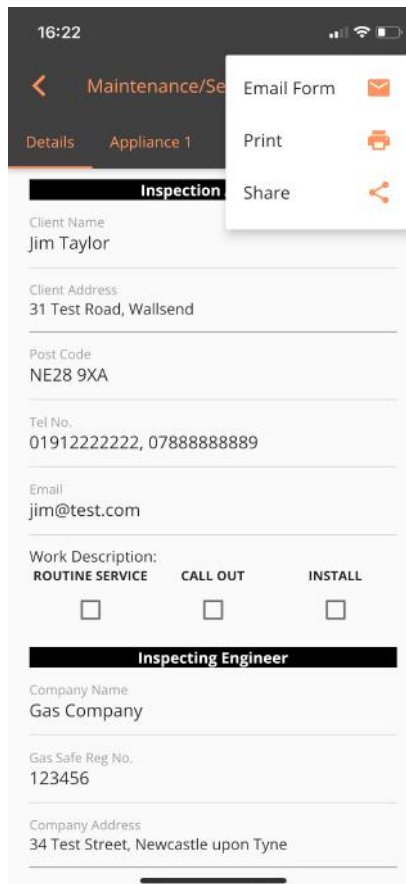
If an engineer just wants to create a form on an ad-hoc basis without linking it to a job then they can simply open the forms menu and choose a form to complete. Engineers can then later choose to link the form to any job they wish using the 'Attach Form' option on the job page.

Sharing Forms

HytechGas allows user to share forms and job details in a variety of ways this includes:

- Email
- Printing
- Airdrop
- Text
- WhatsApp
- Facebook

In order to share a form simply open a completed form and then tap on the three vertical dots on the top right of the screen then tap whichever share option you wish to choose (Fig.18).



The screenshot shows a mobile app interface for a gas safety form. At the top, the status bar shows the time 16:22 and signal/battery icons. The app header has a back arrow, the title 'Maintenance/Service', and a three-dot menu icon. Below the header, there are tabs for 'Details' and 'Appliance 1'. The 'Appliance 1' tab is active, showing a form for 'Inspection'. The form contains the following fields: Client Name (Jim Taylor), Client Address (31 Test Road, Wallsend), Post Code (NE28 9XA), Tel No. (01912222222, 07888888889), Email (jim@test.com), Work Description (with checkboxes for ROUTINE SERVICE, CALL OUT, and INSTALL), Inspecting Engineer (Gas Company), Gas Safe Reg No. (123456), and Company Address (34 Test Street, Newcastle upon Tyne). A share menu is open over the top right of the form, showing options: Email Form, Print, and Share.

Fig.18 - Share Options

Managing Customers

In the HytechGas app admin users can add their customers to our customer database from the 'Manage Customers' section (Fig.19).

Admin users can add customers (Fig.20), edit customers and perform a list of actions for each customer such as:

- Raise a job for that customer
- View all previous jobs for that customer
- Delete customer

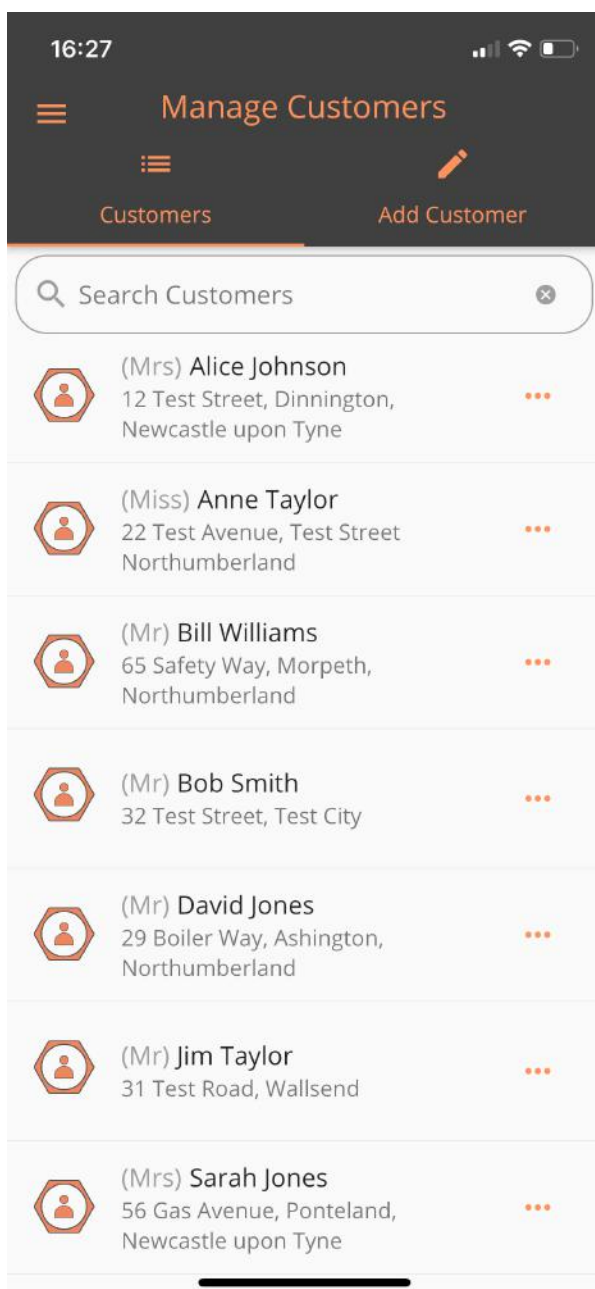


Fig.19 - Customer Database

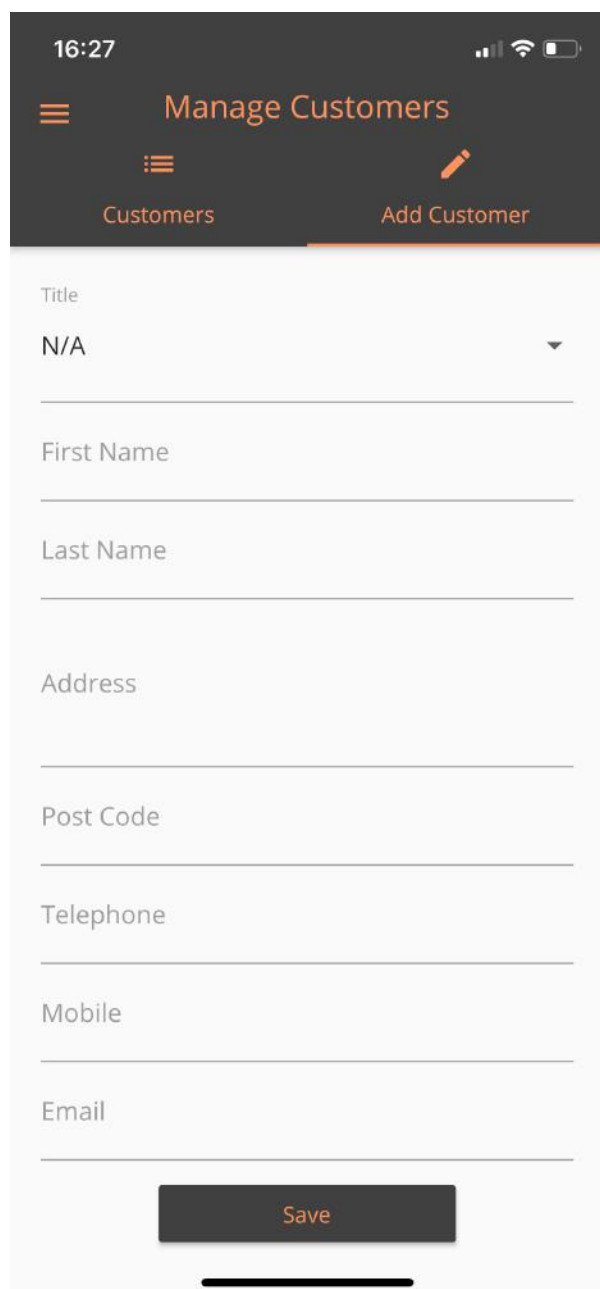


Fig.20 - Add Customer

Managing Users

In the HytechGas app admin users can add other users within their company to the HytechGas system from the 'Manage Users' section (Fig.21).

Admin users can add users (Fig.22), edit users and suspend/resume users which will stop users from using app or allow them to use the app accordingly.

The number of users you can add to the app will depend on the number of licenses you have purchased for your company to use. You can add licenses to your account by contacting us via email (saul@hytechsolutions.info).

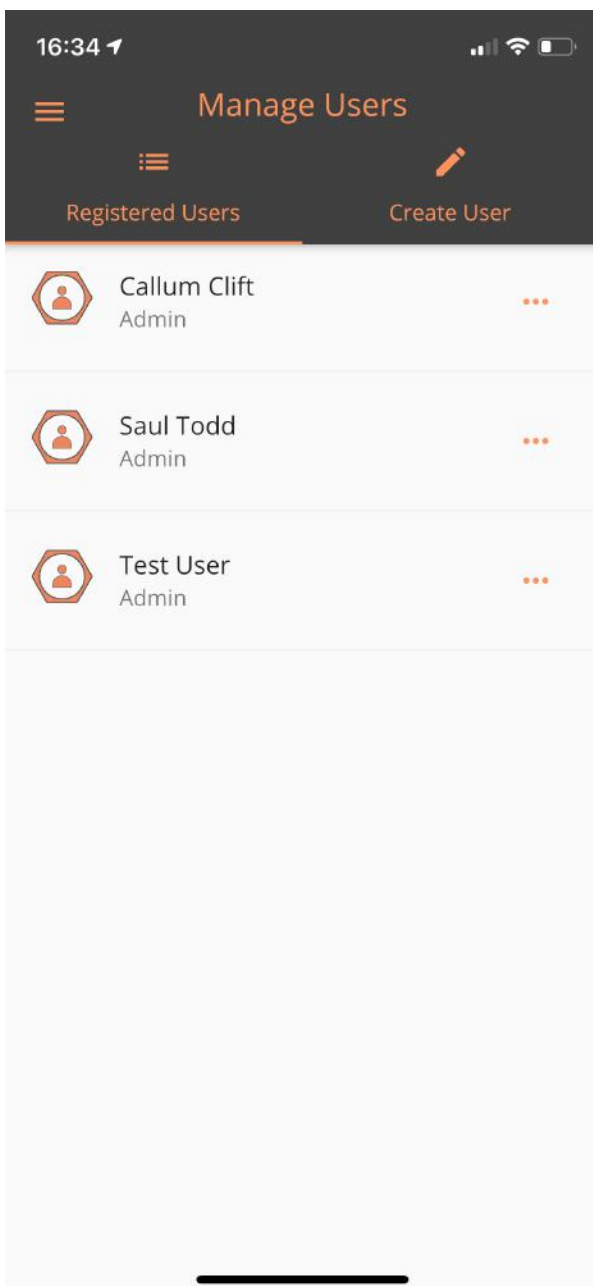


Fig.21 - Users within your Company

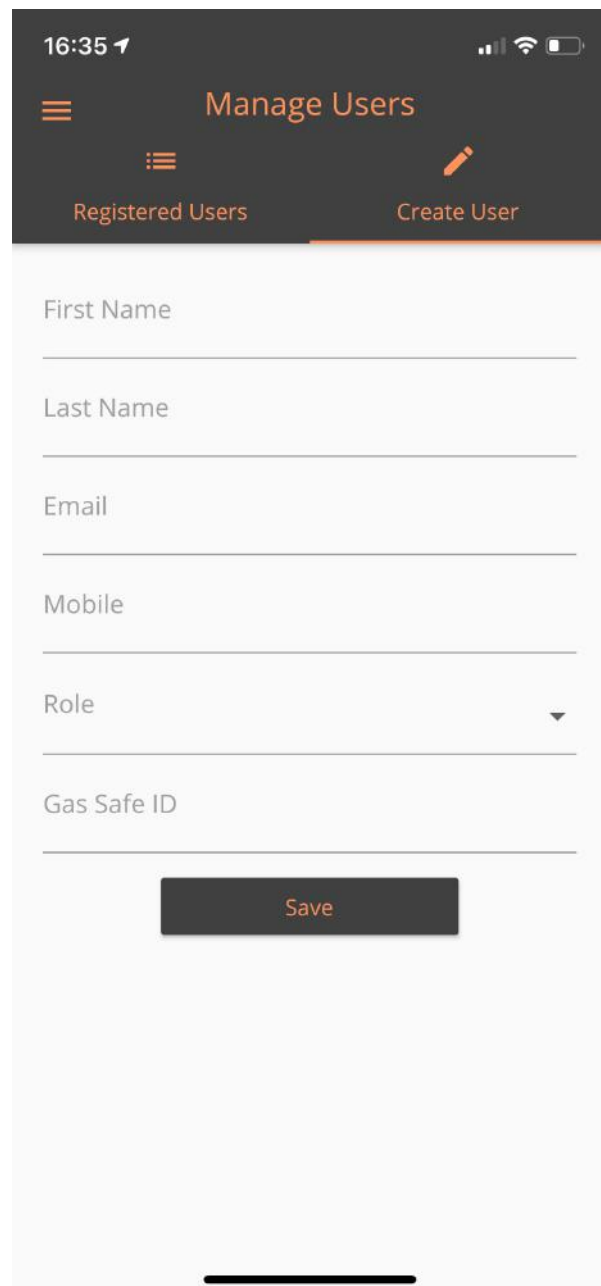


Fig.22 - Adding a User

Jobs Database

HytechGas contains a comprehensive jobs database which stores all of your previously created jobs. Users in the app are able to perform searches on the jobs database to find any past jobs by navigating to the 'Jobs Search' page in the app which can be found in the menu by opening the 'Jobs' option, then tapping on 'Jobs Search' (Fig.23).

Users can search for jobs using a variety of filters depending on their user role. Admin users can search for all jobs in the company whereas engineers are limited to their jobs only. Admin users are able to filter jobs based upon the following filters (Fig.24):

- Dates From & To
- Customer
- Engineer
- Job Status

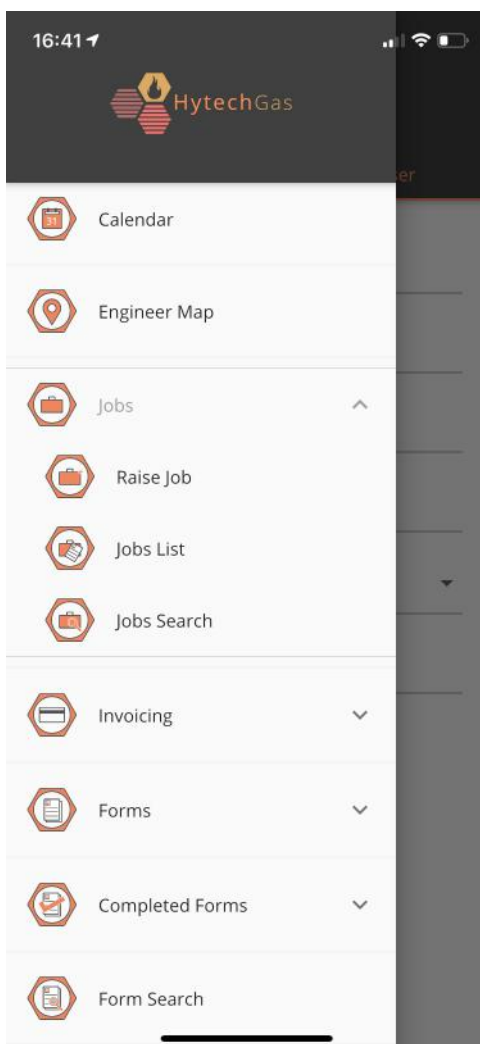


Fig.23 - Jobs Search in menu

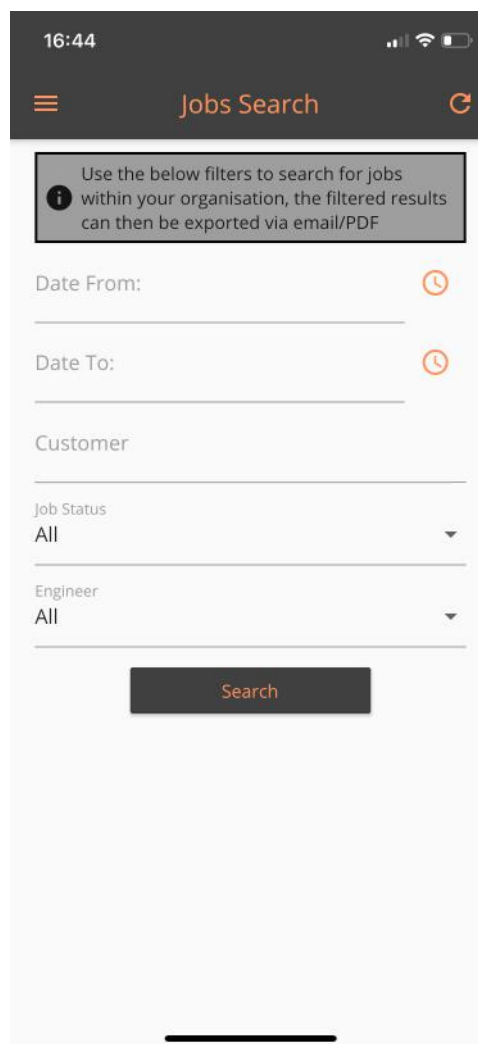


Fig.24 - Jobs Search Filters

Once a search has been performed and some results are returned this will show all of the jobs that match your search criteria in a scrollable list (Fig.25). From here users can view each job and perform actions on each job or they can choose to share the list of jobs externally via email, printing, AirDrop etc.

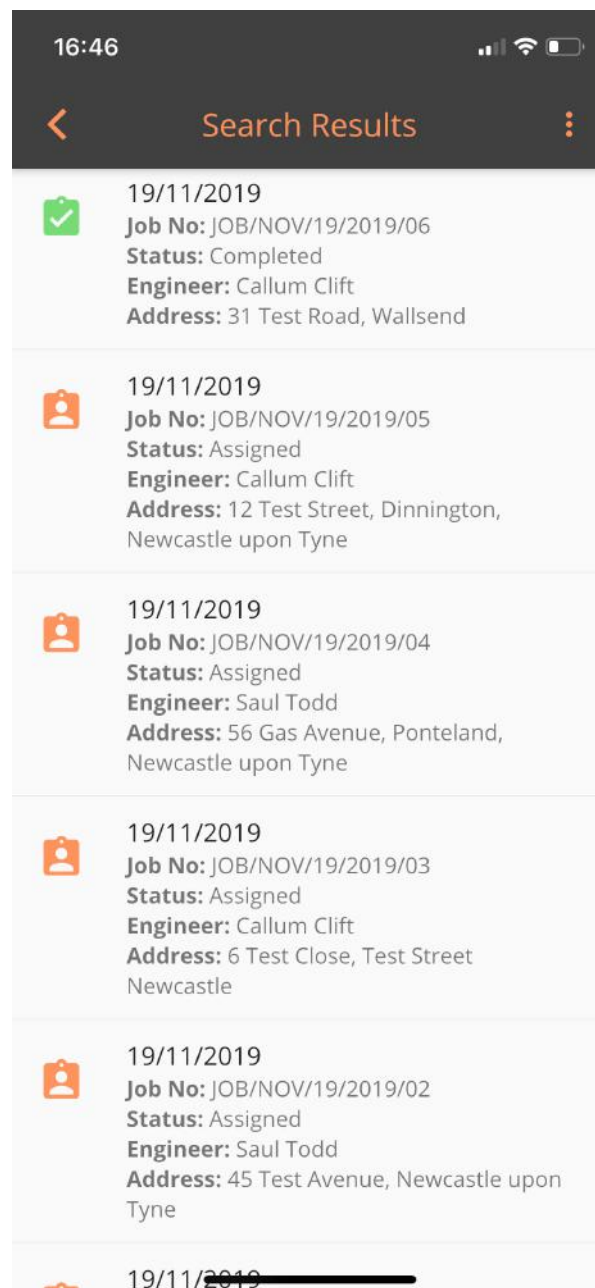
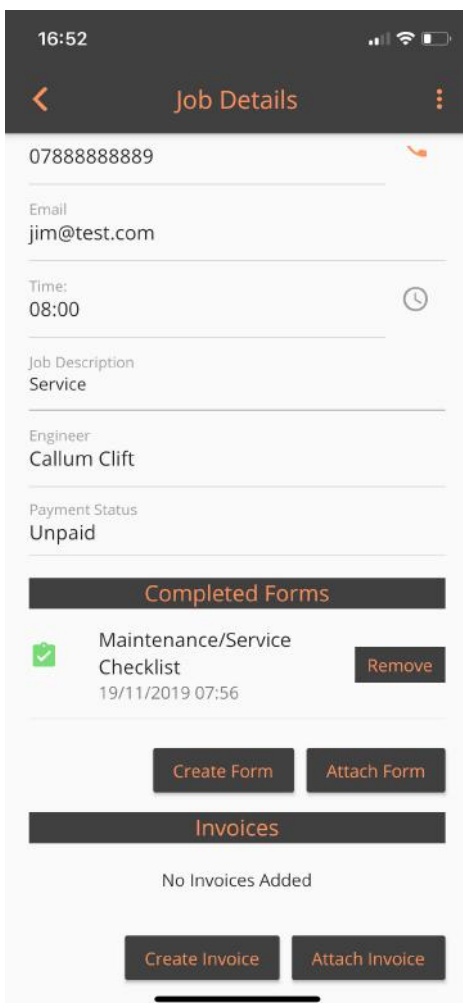


Fig.25 - Jobs Search Results

Creating Invoices

Admin users in the HytechGas app can create & view invoices for jobs. User can choose to create an invoice directly from the job using the 'Create Invoice' button (Fig.26) from the jobs page or they can navigate to the Invoice section of the app and create a standalone invoice using the 'Generate Invoice' page.

If an invoice is created directly from a job this will automatically populate the customers address and contact details with the details of the customer linked to that job (Fig.27).



16:52

< Job Details >

07888888889

Email
jim@test.com

Time:
08:00

Job Description
Service

Engineer
Callum Clift

Payment Status
Unpaid

Completed Forms

✓ Maintenance/Service Checklist
19/11/2019 07:56 Remove

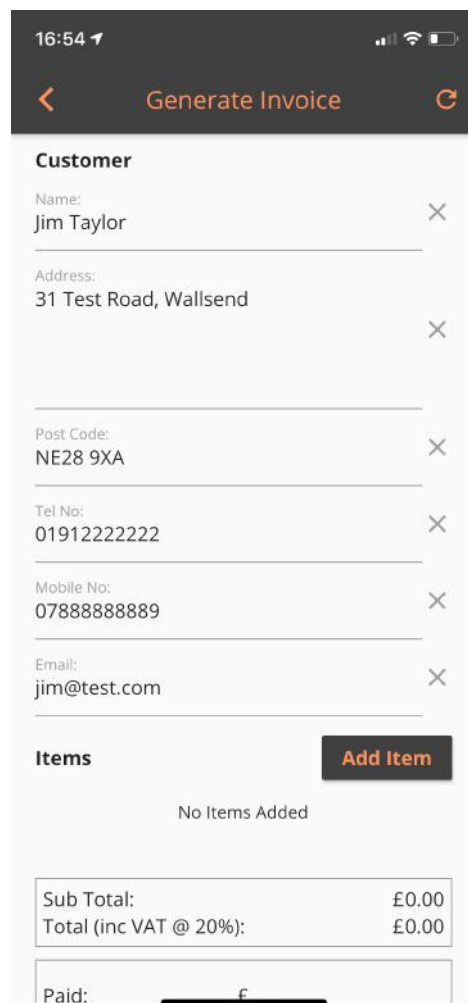
Create Form Attach Form

Invoices

No Invoices Added

Create Invoice Attach Invoice

Fig.26 - Create Invoice from job



16:54

< Generate Invoice >

Customer

Name:
Jim Taylor

Address:
31 Test Road, Wallsend

Post Code:
NE28 9XA

Tel No:
01912222222

Mobile No:
07888888889

Email:
jim@test.com

Items Add Item

No Items Added

Sub Total:	£0.00
Total (inc VAT @ 20%):	£0.00

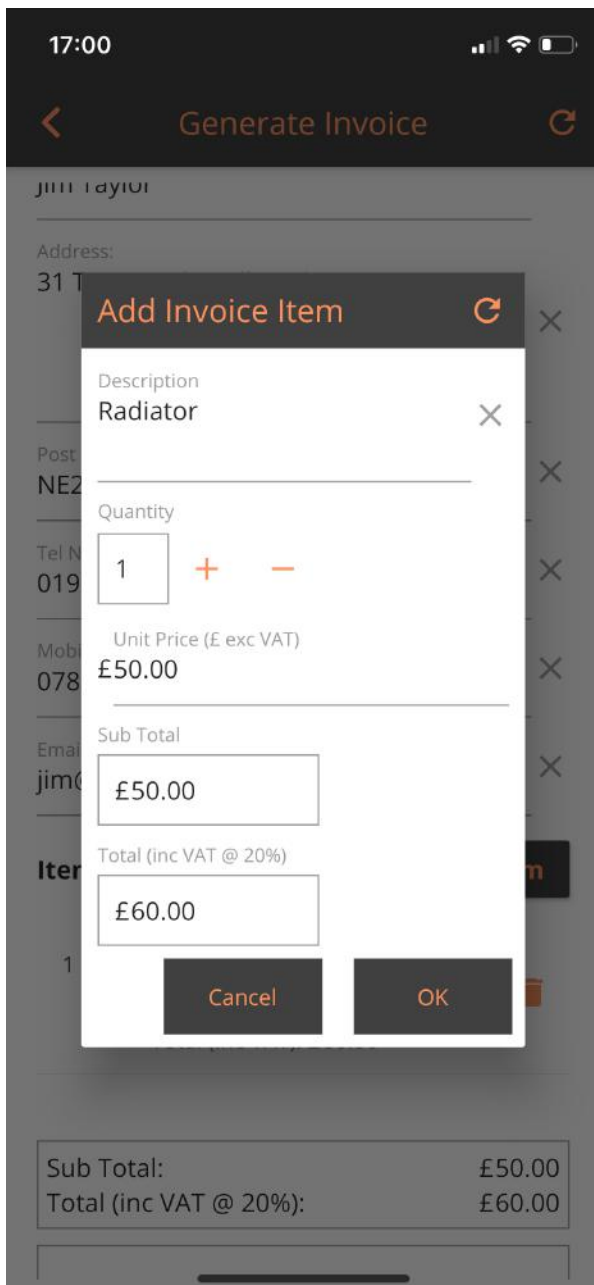
Paid: £

Fig.27 - Auto-populated details on Invoice

In order to add items to an invoice simply tap the 'Add Item' button and fill-in the details of the item, select a quantity and add the non-VAT price (Fig.28). The app will then calculate the VAT price of each item and subsequently the overall invoice cost after adding up the prices of each item in the invoice (Fig.29).

After adding the invoice items you will need to select both the date (the date which the invoice is generated) and the due date of the invoice. Once all required fields are filled in you can submit the invoice and this will be added to the invoice database.

Completed invoices can be viewed directly from the job sheet (if the invoice was created directly from a job) or by navigating to the Invoices section of the app then tapping on 'Invoices' which will bring up a list of your latest invoices separated by status.



Add Invoice Item

Description: Radiator

Quantity: 1

Unit Price (£ exc VAT): £50.00

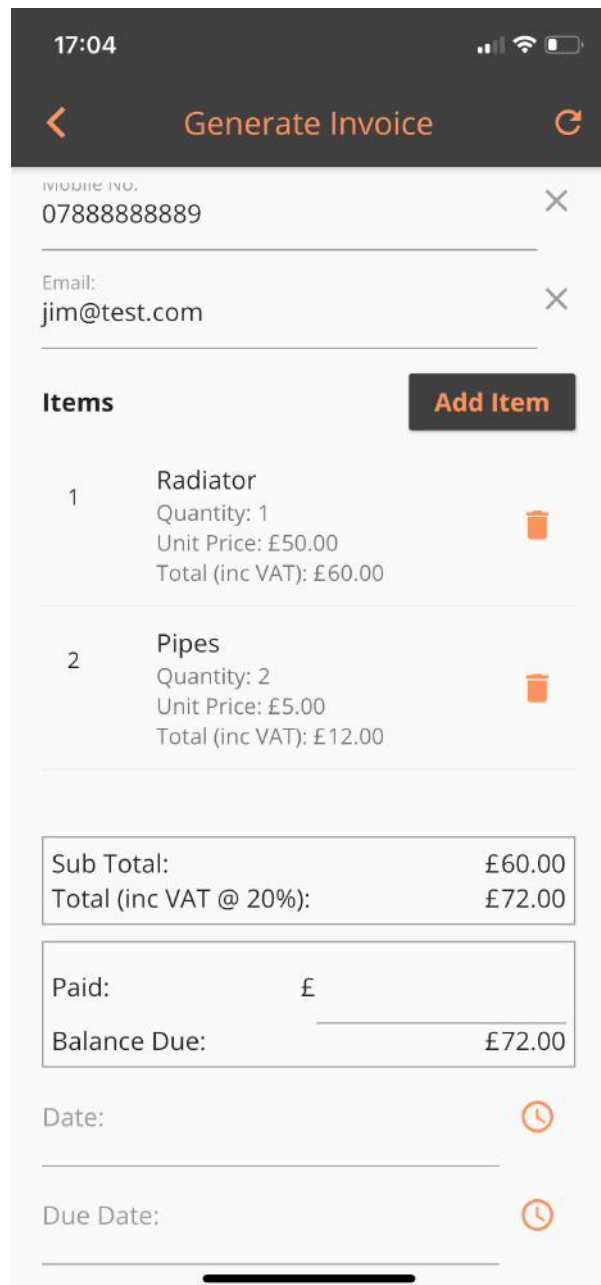
Sub Total: £50.00

Total (inc VAT @ 20%): £60.00

Cancel OK

Sub Total: £50.00
Total (inc VAT @ 20%): £60.00

Fig.28 - Adding an Invoice Item



Generate Invoice

Mobile No.: 07888888889

Email: jim@test.com

Items

1	Radiator	Quantity: 1	Unit Price: £50.00	Total (inc VAT): £60.00
2	Pipes	Quantity: 2	Unit Price: £5.00	Total (inc VAT): £12.00

Sub Total: £60.00
Total (inc VAT @ 20%): £72.00

Paid: £
Balance Due: £72.00

Date:
Due Date:

Fig.29 - Sub Total & Total of Invoice

Invoice Database

HytechGas contains a comprehensive invoices database which stores all of your previously created invoices. Admin users in the app are able to perform searches on the invoices database to find any past invoices by navigating to the 'Invoice Search' page in the app which can be found in the menu by opening the 'Invoices' option, then tapping on 'Invoice Search' (Fig.30).

Admin users are able to filter jobs based upon the following filters (Fig.31):

- Dates From & To
- Invoice Status

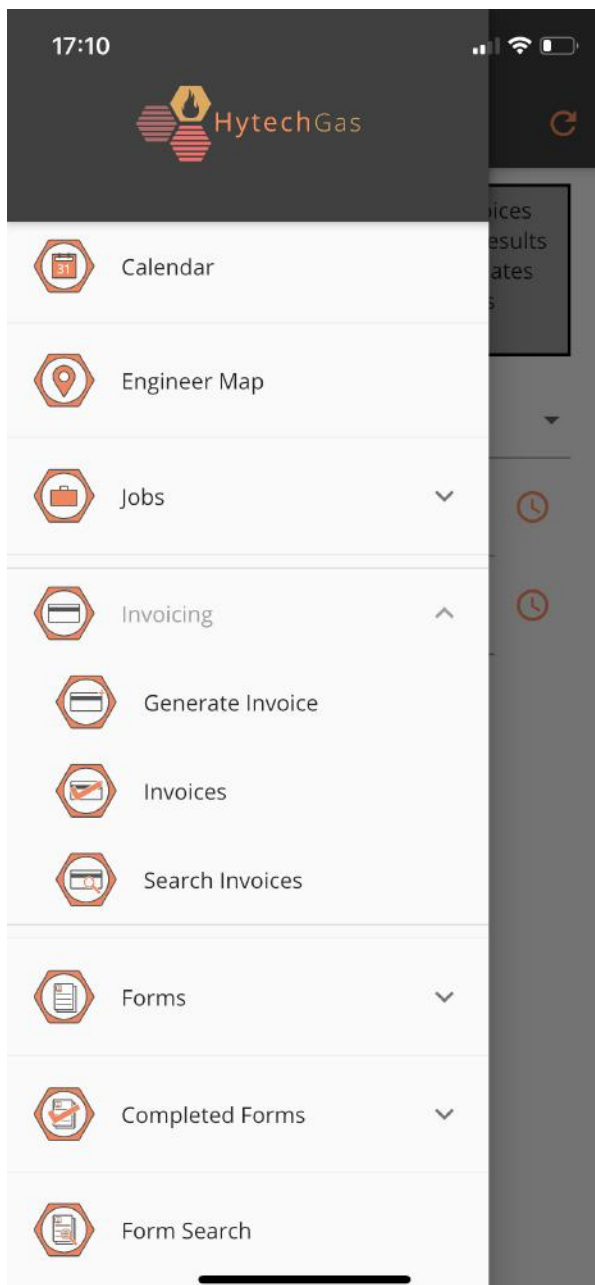


Fig.30 - Invoice Search in Menu

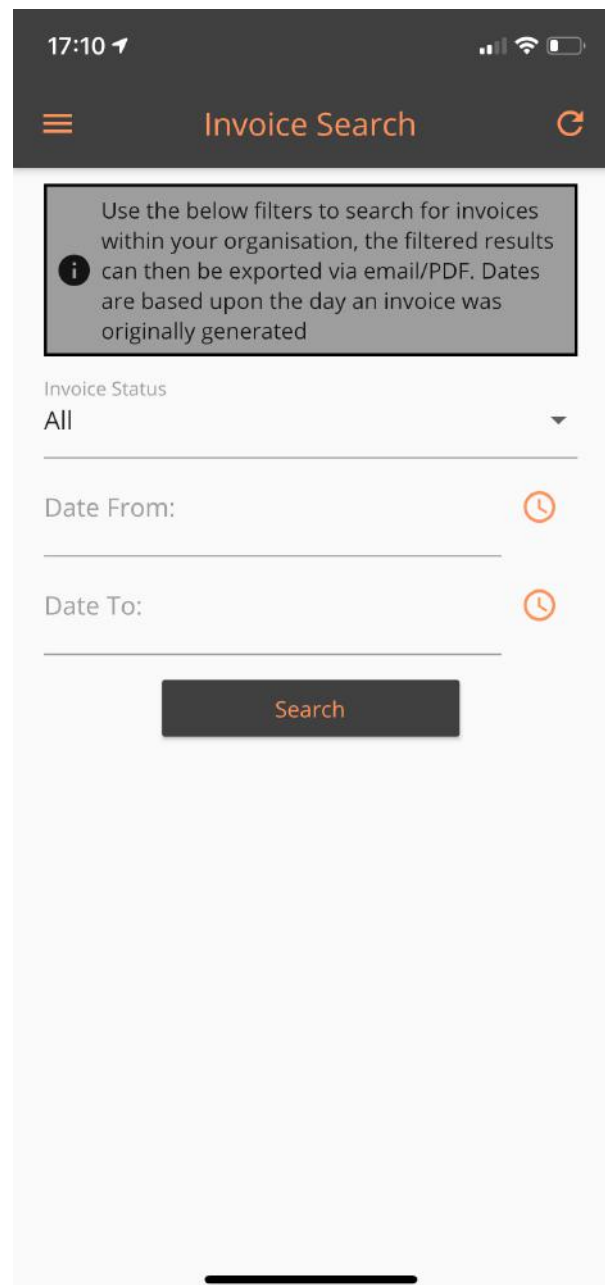


Fig.31 - Invoice Search Filters