M4 Streamline

Complete User Guide

Your All-in-One Tradie Management System

Version 1.0

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1. Getting Started

Welcome to M4 Streamline! This guide will help you master your tradie management system.

Quick Start Tips:

• Start by adding your first client in the **Clients** tab

• Create a quote for that client in the **Quotes** tab

• Once accepted, convert it to an invoice and schedule the job

• Track expenses as you go to monitor profitability

2. Dashboard

Your command center for quick insights and actions.

What You See:

• **Quick Stats:** Total clients, upcoming jobs, pending quotes, and unpaid invoices at a glance

• **Alerts:** Tomorrow's jobs, expiring quotes (48hr warning), and overdue invoices

• **Upcoming Jobs:** Next 5 scheduled jobs with client details and times

• **Recent Activity:** Accepted quotes and unpaid invoices requiring attention

Quick Actions:

• **+ Add Client** (Ctrl+N): Add a new customer

• **+ Schedule Job** (Ctrl+J): Create a new job

• **+ Create Quote** (Ctrl+Q): Generate a professional quote

■ **Tip:** All cards are clickable - tap to jump to the relevant section!

3. Clients

Manage your customer database with ease.

Key Features:

• **Search:** Find clients by name, email, phone, or address

• **Quick Quote:** Create a quote directly from any client card

• **Notes:** Add important reminders or preferences for each client

• **Bulk Delete:** Select multiple clients and delete at once

Adding a Client:

1. Click **+ Add Client** or press **Ctrl+N**

2. Fill in: Name, Email, Phone, Address (optional)

3. Add notes if needed (e.g., 'Prefers morning appointments')

4. Click **Save**

Editing & Deleting:

• Click **Edit** to update client details

• Click **Delete** to remove (asks for confirmation)

• Use checkboxes + **Delete Selected** for bulk operations

■ **Pro Tip:** Export your clients to CSV for backup or importing to other tools!

4. Schedule (Jobs)

Plan and track your work schedule.

Two Views Available:

• **List View:** See all jobs with full details, team assignments, and profit tracking

• **Calendar View:** Visual monthly calendar with color-coded team members

Creating a Job:

1. Click **+ Schedule Job** or press **Ctrl+J**

2. Select client and enter job title

3. Choose date, time, and duration (in days)

4. Assign team members (Business accounts)

5. Add notes about the job

6. Click **Save**

Job Status:

• **Scheduled:** Job is planned (blue badge)

• **In Progress:** Currently working (yellow badge)

• **Completed:** Job finished (green badge)

Profit Tracking:

Each job shows a profit/loss breakdown:

• **Revenue:** From linked paid invoice

• **Expenses:** Sum of all expenses tagged to this job

• **Profit:** Revenue minus expenses with margin %

• Click ■ **View Expenses** to see detailed breakdown

■ **Pro Tip:** Multi-day jobs show duration on the card. Photos can be uploaded to document work!

5. Quotes

Create professional quotes with itemized pricing.

Creating a Quote:

1. Click **+ Create Quote** or press **Ctrl+Q**

2. Select client (address auto-fills)

3. Quote number auto-generates (editable if needed)

4. Enter job address (if different from client's home)

5. Add line items with descriptions, quantities, and prices

6. Toggle GST on/off (10% automatically calculated)

7. Set deposit percentage (0%, 30%, 40%, 50%)

8. Customize payment terms

9. Click **Create Quote**

Sharing Quotes:

• **Download PDF:** Professional formatted document

• ■ **Email:** Send directly to client

• ■ **SMS:** Text quote link (requires SMS setup)

• ■ **Upload File:** Attach plans, photos, or documents

Quote Status:

• **Pending:** Awaiting client response (expires after 30 days)

• ✓ **ACCEPTED:** Client accepted via link or marked manually

• ✓ **CONVERTED:** Quote converted to invoice

Next Steps:

• **Convert to Invoice:** Create invoice from accepted quote

• ■ **Schedule Job:** Add to calendar directly from quote

■ **Pro Tip:** Quotes show job address next to client name - helpful for repeat clients with multiple properties!

6. Invoices

Send invoices and track payments.

Three Views:

• **Unpaid:** Outstanding invoices requiring payment

• **Paid:** Completed transactions

• **Monthly:** Revenue grouped by month

Invoice Features:

• Auto-generated invoice numbers (INV-001, INV-002, etc.)

• Shows client name and job address for easy identification

• Issue date and due date tracking

• Overdue warnings with day count

• Payment date tracking for paid invoices

Quick Actions:

• **Edit:** Update title, dates, status, or notes

• ■ **Mark Paid:** One-click payment recording

• **Mark Unpaid:** Reverse if paid by mistake

• **Download PDF:** Professional invoice document

• ■ **Email:** Send to client

• ■ **Get Payment Link:** Stripe integration (if configured)

Overdue Tracking:

Invoices show status badges:

• ✓ **PAID:** Payment received (green)

• ■ **DUE IN X DAYS:** Payment due soon (yellow)

• ■ **OVERDUE (X days):** Payment late (red)

Bulk Operations:

• Select multiple invoices with checkboxes

- Delete old paid invoices in bulk

■ **Pro Tip:** Dashboard shows total outstanding and paid amounts at the top!

7. Expenses

Track costs and link expenses to jobs for profit analysis.

Adding an Expense:

1. Click **+ Add Expense** or press **Ctrl+E**
2. Enter date and amount
3. Select category (Materials, Fuel, Equipment, etc.)
4. Link to specific job (optional but recommended)
5. Assign to team member (Business accounts)
6. Add description
7. Upload receipt (optional)
8. Click **Save**

Expense Categories:

• Materials, Fuel, Equipment, Subcontractors

• Office Supplies, Insurance, Marketing, Other

Filtering & Views:

• **Current Month:** This month's expenses

• **Month Selector:** View any past month

• **All Time:** Complete expense history

• **Search:** Find by description or category

Job Linking:

When you link expenses to jobs:

• Job cards show total expenses

• Automatic profit/loss calculation

• Click ■ **View Expenses** on job to see breakdown

Table View:

Expenses display in an organized table with:

• Date, Category, Job, Team Member, Description, Amount

• Receipt links (click ■ to view)

• Checkboxes for bulk deletion

• Sortable and searchable

■ **Pro Tip:** Link expenses as you go - this gives real-time profit tracking on jobs!

8. Analytics

Understand your business performance with visual insights.

Key Metrics:

• **Quote Win Rate:** Percentage of quotes that get accepted

• **Total Revenue:** All paid invoices

• **Total Expenses:** Sum of all tracked costs

• **Net Profit:** Revenue minus expenses with margin %

• **Outstanding:** Unpaid invoices total

Secondary Metrics:

• **Avg Collection Time:** Days between invoice sent and payment

• **Avg Quote Value:** Mean quote amount

• **Overdue Invoices:** Count of late payments

Top Clients:

See which clients generate the most revenue:

• Ranked list with total paid amounts

• Number of completed jobs per client

■ *Most Profitable Jobs:*

Top 5 jobs by profit margin:

• Ranked with profit amount and margin %

• Shows revenue vs expenses breakdown

• Warning if jobs are running at a loss

Business Funnel:

Track your sales pipeline:

• Quotes Sent → Quotes Accepted → Invoices Sent → Invoices Paid

Charts:

• **Revenue vs Expenses:** Line chart showing trends over time

- **Expense Categories:** Pie chart of spending breakdown
- Date range selector: Current Month, 3/6/12 months, All Time

■ **Pro Tip:** Check analytics weekly to spot trends and optimize pricing!

9. Settings

Customize your system and manage account preferences.

Company Information:

• Business name, ABN, phone, email, address

• Appears on quotes and invoices

Team Members (Business Accounts):

• Add workers with names, occupations, and colors

• Assign to jobs for scheduling

• Track individual expenses

• Color-coded in calendar view

Stripe Integration:

• Connect Stripe for online payments

• Clients can pay invoices directly

• Get payment link button on invoices

SMS Settings:

• Configure Twilio for SMS notifications

• Text quotes and invoices to clients

Account Type:

• **Solo Tradie:** Single person, simplified interface

• **Business:** Team management features enabled

Data Management:

• **Export CSV:** Backup data for clients, jobs, quotes, invoices, expenses

• **Delete Account:** Permanently remove all data (requires double confirmation)

■ **Pro Tip:** Fill in company details first - they'll auto-populate on all your documents!

10. Keyboard Shortcuts

Work faster with these time-saving shortcuts!

Action	Windows/Linux	Mac
Add Client	Ctrl + N	■ + N
Create Quote	Ctrl + Q	■ + Q
Schedule Job	Ctrl + J	■ + J
Add Expense	Ctrl + E	■ + E
Go to Dashboard	Ctrl + D	■ + D
Go to Schedule	Ctrl + S	■ + S
Go to Analytics	Ctrl + A	■ + A

■ **Note:** Shortcuts only work when you're not typing in a text field!

Tips & Best Practices

Getting the Most from M4 Streamline:

1. Link Everything:

• Link expenses to jobs for automatic profit tracking

• Convert quotes to invoices to maintain data flow

• Schedule jobs from accepted quotes

2. Use Job Addresses:

• Set specific job addresses for clients with multiple properties

• Addresses show on quotes and invoices for clarity

3. Track Expenses Daily:

• Enter expenses as you go, not at month end

• Upload receipts immediately

• Link to jobs for real-time profit visibility

4. Leverage Search:

• Every section has powerful search

• Search by name, address, amount, date, or description

• Use bulk operations to clean up old data

5. Review Analytics Weekly:

• Check profit margins on completed jobs

• Monitor quote win rate

• Identify your most profitable job types

6. Backup Regularly:

• Export CSV files monthly

• Keep copies of important quotes and invoices

7. Professional Communication:

• Fill in company details in Settings

- Use PDF downloads for formal documents
- Set up email and SMS for faster client communication

Support & Resources

Need help? Here's how to get support:

Feature Requests:

Have an idea for improvement? Use the feedback button (■/■) on any screen to share suggestions.

Database Migrations:

Some features require database updates. If a feature isn't working:

1. Check Settings for any SQL migration files
2. Run them in your Supabase SQL Editor
3. Refresh the app

Remember:

M4 Streamline is designed to save you time and increase profitability. The more you use it, the better insights you'll gain about your business!

Happy streaming! ■