



TRADESMATE

Set up once. Run every job with confidence.

A practical guide to customers, jobs, quotes, invoices, payments, expenses, reminders, team access and business data.

ANDROID APP USER GUIDE

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START HERE

What TradesMate helps you do

TradesMate keeps the operational side of a trade business in one secure workspace. Use the tabs at the bottom of the app to move between the day-to-day areas.

- | | |
|----|---|
| 01 | Set up your account and business profile |
| 02 | Add customers and contact them |
| 03 | Schedule, assign and complete jobs |
| 04 | Create quotes and convert accepted work |
| 05 | Issue invoices and record payments |
| 06 | Track expenses, outstanding money and profit |
| 07 | Configure reminders, team access and security |
| 08 | Manage subscription, themes and data export |

Recommended order

Complete the business profile first, then add a customer, schedule the job, prepare the quote, convert it to an invoice, and record payments and costs. This keeps every record linked and the Finance totals meaningful.

01 - SETUP

Create your account and business profile

Download TradesMate from Google Play. Registration creates your business workspace and makes you its owner.

1

Register

Enter your business name, your name, email address and a strong password. If a TradesMate partner supplied a referral ID, enter it during registration.

2

Open Business settings

Tap More, then Business profile. Only the owner can change the main business details.

3

Complete the profile

Add the business email, phone, address, registration number and tax number as applicable. These details are used on customer-facing documents.

4

Choose the default currency

Select GBP, USD or EUR before creating documents. Existing quotes, invoices and expenses keep their original currency so historical totals remain correct.

Before live use

Check your business name, address, contact information and currency carefully. Create one test quote and PDF to confirm that the customer sees the details you expect.

Your main navigation

- Home - paid revenue, outstanding money, profit, upcoming jobs and overdue invoices.
- Finance - quotes, invoices, payments, expenses and currency totals.
- Jobs - scheduled work, status and assigned worker.
- More - profile, team, reminders, subscription, export, security and appearance.
- Customers - customer records and contact actions.

02 - CUSTOMERS

Build a clean customer list

Create the customer before scheduling work or preparing documents. A customer name is required so jobs and documents remain easy to identify.

1**Add a customer**

Open Customers and tap New customer. Enter the customer's name and any available email, phone number and address.

2**Review before saving**

Use a full, recognisable name. Add the job-site address if it is the usual service location.

3**Use contact actions**

Open the customer record and tap Call, Email or WhatsApp. The phone number and email address are also tappable.

4**Edit when details change**

Open the existing customer and use Edit. Updating a customer avoids duplicate records and keeps future work attached to one history.

WhatsApp numbers

Use an international-format number where possible, including the country code, for example +44 for the United Kingdom. WhatsApp decides whether the number belongs to an active account.

Good customer data

- Do not create placeholder or blank customers.
- Confirm spelling before issuing a quote or invoice.
- Treat exported phone numbers, email addresses and addresses as personal data.

03 - JOBS

Schedule the work and keep the team aligned

A job links the customer, time, address, assignee, reminders and job photos.

1**Schedule**

Open Jobs and tap Schedule job. Choose the customer, enter a clear title, date and start time, and add the address and description.

2**Assign**

Owners and admins can choose a team member. Workers see the work available to their role.

3**Set the reminder**

Choose how long before the start time TradesMate should notify you. The job start time and the reminder interval are different: a 60-minute reminder fires one hour before the job.

4**Update status**

Move work through Scheduled, In progress and Completed. Use Cancelled only when the job will not proceed.

5**Add evidence**

Open Job details to add Before and After photos. Images are compressed for practical storage while preserving useful visual quality.

Time zones

Enter the job in the phone's local time. TradesMate sends a timezone-aware value to the server and displays it back in local time. If a time looks wrong, check the phone's automatic date, time and timezone settings.

APPOINTMENTS

Enable reliable job reminders

Reminder delivery requires Android notification permission and a physical device with an internet connection.

1**Allow notifications**

Open More, find Appointment reminders and tap Enable reminders. Approve the Android notification prompt.

2**If previously denied**

Tap Open Android settings, enable notifications for TradesMate, then return to the app.

3**Create or edit the job**

Set a future start time and select the reminder interval. Confirm that the correct worker is assigned.

4**Keep the session current**

TradesMate refreshes the signed-in session in the background. PIN or biometric unlock protects the saved session without requiring the full password each time.

What the reminder means

The reminder is calculated from the job start. Example: a job at 14:00 with a 60-minute reminder is due at 13:00.

Troubleshooting

If no notification appears, confirm Android permission, battery/background restrictions, network access, the job's future time, the selected assignee and the reminder interval.

04 - QUOTES

Prepare a clear quote and turn approval into work

Quotes support multiple line items, tax, notes, a linked customer and an optional linked job.

1**Create**

Open Finance and choose New quote. Select the customer and, when useful, the related job.

2**Add line items**

Describe each item, enter its quantity and unit price, then add further items for labour, materials or separate stages.

3**Check totals**

Review subtotal, tax and total. Add notes for scope, assumptions, exclusions or validity.

4**Save and edit**

A draft can be edited before finalisation. Recheck customer, currency and every amount before sharing the PDF.

5**Accept and convert**

When the customer accepts the quote, mark it accepted and convert it to an invoice. TradesMate carries the agreed items forward and keeps the source quote link.

Avoid duplicate billing

Convert the accepted quote once. Review the generated invoice before finalising it, especially if the delivered work differs from the original scope.

05 - INVOICES

Invoice accurately and record every payment

Invoices show their own currency, due date, status, payment history, amount paid and outstanding balance.

1**Create or convert**

Create a new invoice in Finance or convert an accepted quote. Select the customer and optional related job.

2**Set the due date**

Choose a realistic payment due date. Once unpaid beyond that date, the invoice appears as overdue.

3**Final review**

Check customer, items, quantities, prices, tax, notes, currency and due date before finalisation.

4**Share**

Open the invoice and use the available share action to send its PDF. Email can launch the phone's mail app when a compatible app and customer email are available.

5**Record payments**

Add each payment separately, including amount, date and method such as cash, card, bank transfer, cheque or other.

Partial payments

Do not overwrite the invoice total when a customer pays part of it. Record the payment instead. TradesMate keeps the history and reduces the outstanding balance until fully paid.

Corrections

Edit while the document is still a draft. For a finalised document that needs a formal correction, preserve the audit trail and contact support if you are unsure of the correct process.

06 - FINANCE

Understand revenue, costs and outstanding money

Finance reports each currency separately. It does not convert GBP, USD and EUR into one artificial total.

What the figures mean

Paid revenue	Payments actually recorded against invoices.
Outstanding	Invoice value that has not yet been paid.
Expenses	Costs you record for the business or a related job.
Profit	Paid revenue minus recorded expenses for that currency.
Overdue	Unpaid invoice balances past their due date.

1

Record a cost

Open Finance and choose New cost. Enter the category, description, amount, currency and date; link the job when relevant.

2

Review overdue work

Open overdue invoices from Finance, confirm whether a payment has already arrived, and record it before contacting the customer.

3

Reconcile regularly

Compare TradesMate payment history with your bank, card and cash records. Correct omissions promptly.

Financial scope

TradesMate is an operational record and workflow tool. Confirm tax, statutory invoice and accounting requirements with a qualified professional in your jurisdiction.

07 - ACCESS

Set roles and protect the app

Use individual accounts for team members. Do not share the owner's password.

Role	Typical access
Owner	Business profile, team, subscription, export and full operational access.
Admin	Day-to-day management, including customers, jobs and business records permitted by the app.
Worker	A focused view of assigned operational work without owner-only financial and administration controls.

1

Add staff

Open More, Team members and Add team member. Give each person the least powerful role that fits their work.

2

Review access

The owner can switch admin and worker roles and disable accounts that no longer need access.

3

Enable device protection

Open More, App security. Set a 4-6 digit PIN, enable biometrics where available, or use both.

4

Sign out safely

Use Sign out before handing the device to another person. Signing out removes the saved session and local unlock settings.

PIN behaviour

After repeated incorrect PIN attempts, TradesMate temporarily blocks further attempts. Your PIN stays encrypted on the device and is not sent to the TradesMate server.

08 - MORE SETTINGS

Subscription, appearance and data export

The More tab groups the controls used less frequently but important for ownership and continuity.

Subscription and billing

- Open Subscription & billing to see the current plan and available monthly or yearly packages.
- The monthly offer may display a 14-day free trial when the current Google Play offer makes the account eligible.
- Use Restore purchases after reinstalling the app or moving to another Android device with the same Google Play account.

Appearance

- Choose Warm light, Clean light, Deep green or Graphite. The theme is applied across the app.

Export business data

- Owners can tap Export business data to prepare a ZIP containing customers, jobs, documents, payments and expenses.
- The download can contain personal and financial data, including customer phone numbers and email addresses.
- Store the ZIP in a protected location. Do not send it through an unsecured channel or leave it on a shared device.

Export is not the same as server recovery

The user-facing ZIP is useful for portability and record access. Production disaster recovery also requires controlled server and database backups managed by the service operator.

HELP

Quick troubleshooting

Most issues can be narrowed down by checking the device, connection, permission and the record involved.

Cannot sign in	Check the email spelling, password visibility eye and network. If the session expired, sign in again only if automatic refresh cannot recover it.
Reminder did not arrive	Confirm Android notification permission, future job time, reminder interval, assignment, network and battery/background settings.
Call or email does not open	Check that the customer has a valid value and that the phone has a compatible dialler or mail app configured.
WhatsApp cannot find the number	Save or enter the phone in international format and confirm that the customer uses WhatsApp.
Totals look unexpected	Review invoice status, every recorded payment, expenses and currency. The app keeps currencies separate.
A worker cannot see a control	The control may be restricted by role. Ask the owner to review Team members and the person's role.
Keyboard covers a field	Scroll the form while the keyboard is open or dismiss it, then confirm the app is updated to the latest Google Play release.

Contact support

Visit gettradesmate.com/support. Include the app version and build number shown near the bottom of More, the phone model, what you were doing, what you expected and what appeared. Never send your password.

READY TO WORK

First-day checklist

Use this list before entering live customer and financial information.

- | | |
|--------------------------|--|
| ☐ | Account created with the correct business owner email |
| ☐ | Business profile and default currency checked |
| ☐ | Test customer created with phone, email and address |
| ☐ | Test job scheduled in the correct local time |
| ☐ | Android notifications enabled and a test reminder received |
| ☐ | Test quote created with multiple line items and PDF reviewed |
| ☐ | Accepted quote converted to an invoice |
| ☐ | Partial test payment recorded and balance checked |
| ☐ | Test expense recorded in the correct currency |
| ☐ | Team roles reviewed; unused access disabled |
| ☐ | PIN or biometric unlock configured |
| ☐ | Business data export downloaded and stored securely |

You are ready

Keep records current as work happens: update the job, record the payment, add the expense and review overdue invoices. Small updates made promptly are what make the dashboard useful.