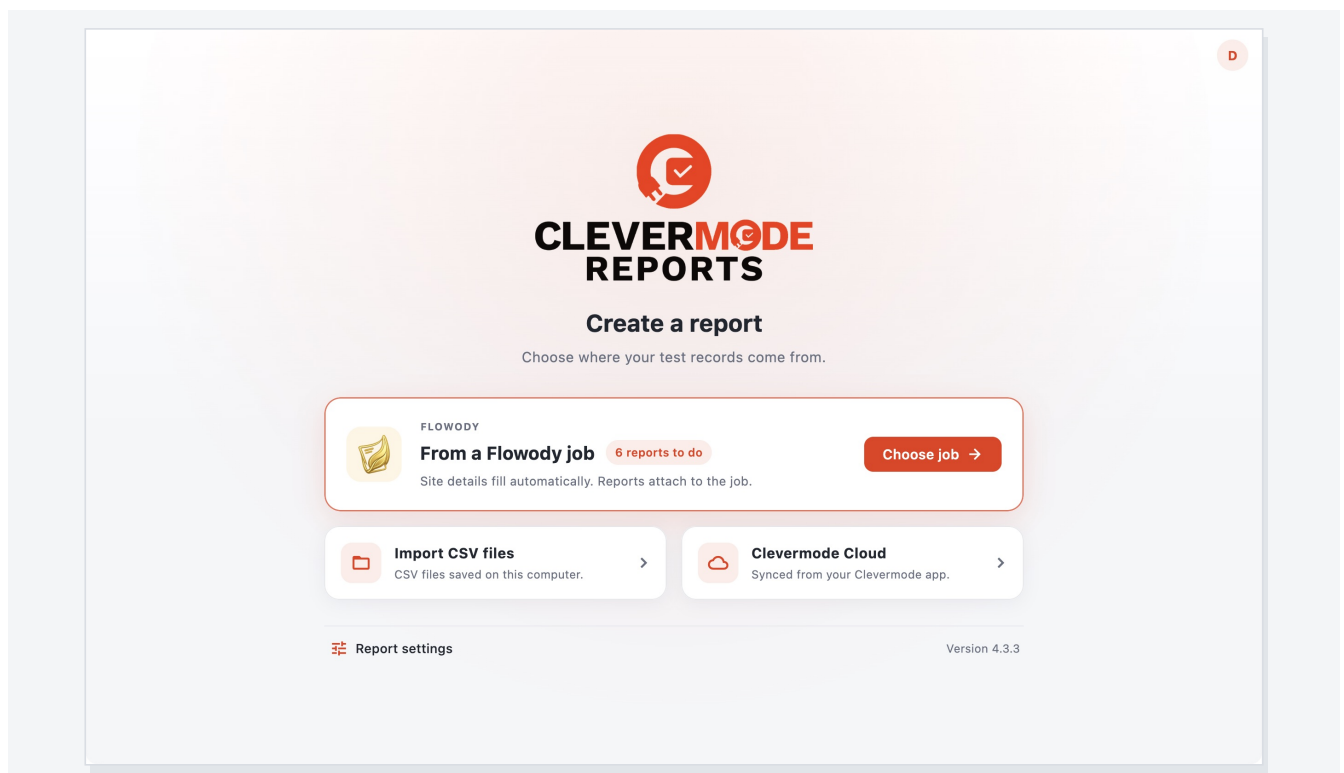


Clevermode Reports

User guide

Setup and reporting for Windows and Mac



[Installation](#) · [Company setup](#) · [PDF reports](#) · [Cloud](#) · [Flowody](#)

START HERE

Install and find your way

Follow pages 3–6 for your first CSV report. Cloud and Flowody workflows are optional.

Company setup **03**

Import your files **04**

Customer and locations **05**

Preview and save **06**

Check your PDFs **07**

Clevermode Cloud **08**

Shared folders and mixed sources **10**

Flowody **11**

Troubleshooting **15**

Report reference **16**

Install on Mac

Needs: macOS 10.15 Catalina or newer.
Confirm the current requirements in the store.

01 Find Clevermode Reports. Search the Mac App Store for “Clevermode Reports”, then install it.

02 Open the app. Press Cmd+Space and search for “clevermode”, or use **Applications** or **Launchpad**. The file is named **clevermode_reports**.

Mac App Store

Before you start. Have your company details, a PNG or JPG logo, and your test records ready. CSV import needs no account. Cloud needs a Clevermode account; Flowody needs a connected Flowody account.

About the examples. Screens show fictional data. Use your own details. Counts, report types and version footers can differ. Store updates install automatically.

Install on Windows

Needs: 64-bit Windows 10 version 1809 or newer, or Windows 11. Confirm in the store.

01 Find Clevermode Reports. Search the Microsoft Store for “Clevermode Reports”, then install it.

02 Open the app. Open the **Start menu**, search for **Clevermode Reports**, then select it.

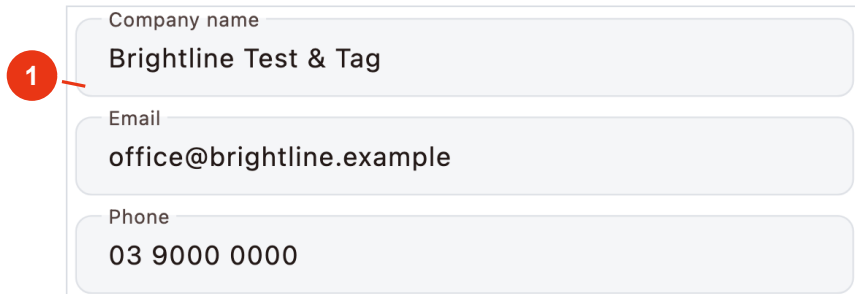
Microsoft Store

01 SET UP

Add your company details

From Home, open **Report settings**. The numbered close-ups below match the three steps.

YOUR COMPANY DETAILS



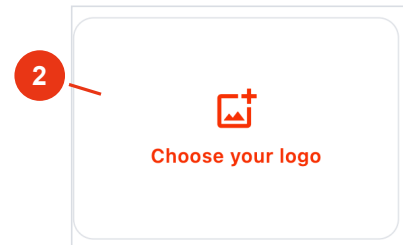
1

Company name
Brightline Test & Tag

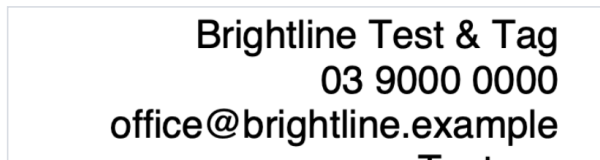
Email
office@brightline.example

Phone
03 9000 0000

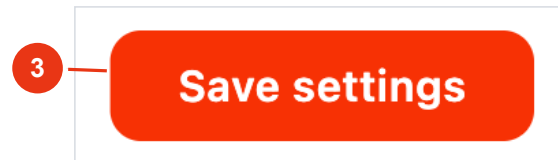
YOUR LOGO



EXAMPLE OF THE COMPANY DETAILS ON A PDF



SAVE YOUR CHANGES



Close-ups from Report settings, plus an example of the company details printed on a PDF.

01 Enter your company details. Under **Your company**, complete **Company name**, **Email** and **Phone**.

02 Choose your logo. Click **Choose your logo** and select a PNG or JPG. Use **Change logo** to replace an existing logo.

03 Save the company card. Click **Save settings**.

What happens next

Your business details and logo are ready to appear on every PDF. Preview your first report to check them.

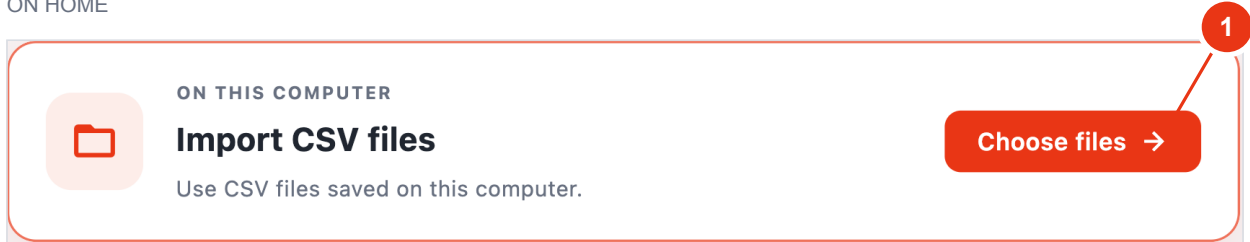
Set this up once. Return to **Report settings** whenever your business details change.

02 CHOOSE RECORDS

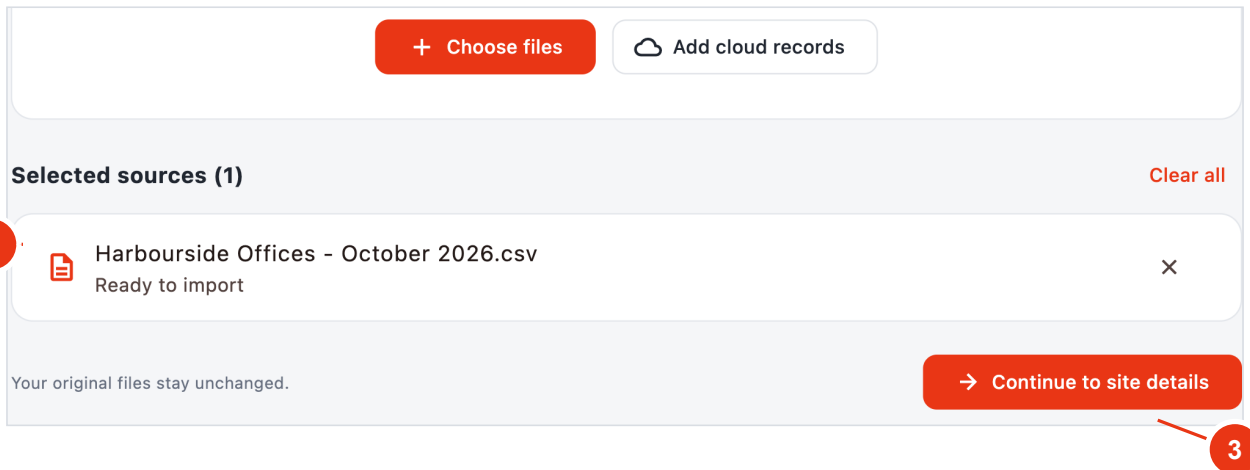
Choose and import your files

Start with CSV exports from the Clevermode phone app. You can select several exports for one customer site.

ON HOME



ON CREATE A REPORT



1 Choose files on Home. 2 Check the selected sources. 3 Continue to site details.

01 Choose your files. On Home, under **Import CSV files**, click **Choose files** and select the exports. CSV import needs no account; the import screen also accepts TXT exports.

02 Check the selected sources. Each file should say **Ready to import**. **Choose files** adds more; the X for **Remove source** removes one; **Clear all** empties the list.

03 Continue. Click **Continue to site details**.

What happens next

The selected exports are ready for the report. Your original files stay unchanged.

Windows and Mac. Use the File Explorer file dialog on Windows or the Finder dialog on Mac. Multi-selection is allowed.

Other starting points. Open **Clevermode Cloud** for synced records (page 8), or **From a Flowody job** → **Choose job** after connecting Flowody (page 11).

03 CREATE REPORTS

Check the customer and locations

Confirm what will print on the reports, then tidy the names used to group the test records.

The screenshot shows a form for entering customer and location details. It is divided into four sections, each with a label and a text input field. Step 1 points to the 'Site name' field, which contains 'Harbourside Offices'. Step 2 points to the 'Full address' field, which contains '88 Wharf Road, Docklands VIC 3008'. Step 3 points to the 'Review locations' button, which is red and has a right arrow icon. Below the form, there is a link 'CONTINUE TO LOCATION REVIEW'.

1 Site name
Harbourside Offices

Full address
88 Wharf Road, Docklands VIC 3008

2 Phone number (optional)
03 9000 1234

Email address (optional)
facilities@harbourside.example

CONTINUE TO LOCATION REVIEW

3 → Review locations

1 Site name. 2 Address and contact fields. 3 Review locations.

01 Confirm Site name. Enter the customer's site name. This field is required.

02 Confirm the contact details. Check **Full address**, **Phone number (optional)** and **Email address (optional)**. Check any details filled from the last job or from Flowody.

03 Click Review locations. Review **Sites**, **Buildings**, **Rooms** and **Testers**. Click inside a name and type the correction; every test with that name changes together.

04 Continue to the reports. Look for **Updated**, then click **Next**. For cloud records, wait for **Saved — N records updated in the cloud**; QR tag pages update too.

What happens next

Your customer details and location names are ready. Next, preview and save the report set.

03 CREATE REPORTS

Preview and save the report set

Check the record count and review the PDF before sending it to your customer.

PREVIEW A REPORT

1

Appliance Register

A complete register of tested appliances and results.

SAVE THE WHOLE SET

2**Export report set**

1 Open a report tile to preview it. 2 Export the applicable PDFs together.

01 Preview a report. On **Choose your reports**, check the number of records ready. Click **Appliance Register** or another available tile to open **PDF Preview**. Check the details, then use the back arrow.

02 Export the report set. Click **Export report set**. At **Choose folder to save reports**, choose your destination.

03 Open the saved folder. When **Reports saved.** appears, click **Show folder**. This opens Finder on Mac or File Explorer on Windows.

Read warnings before sending. If **Check this file before sending the report** appears, read every line and address the issue before sending the PDFs.

Your chosen folder

<Site name> - <YYYY-MM-DD> - <time>
PDF reports + Test_Records.csv

What happens next

You have a saved report folder containing the applicable PDFs and Test_Records.csv, the exact records used to make them.

Finished a cloud report? After checking the saved files, use **Mark Completed** for the reported groups. See page 9.

03 CREATE REPORTS

Check the PDFs before sending

Use these close-ups to check the details that matter. The report set is described on page 16.

APPLIANCE REGISTER

1 Harbourside Offices
88 Wharf Road
Docklands VIC 3008
03 9000 1234
facilities@harbourside.example

Brightline Test & Tag
03 9000 0000
office@brightline.example
Testers:
ALEX MORGAN
JORDAN LEE

3

Test ID	Date	Period	Appliance	Brand/Make	Result	Retest Date
LEVEL 1 RECEPTION						
HS0001	3/10/2026	12	MONITOR	DELL	PASS	3/10/2027
HS0002	3/10/2026	12	LAPTOP CHARGER	LENOVO	PASS	3/10/2027
HS0003	3/10/2026	12	POWER BOARD	HPM	PASS	3/10/2027
HS0004	3/10/2026	12	DESK LAMP	IKEA	PASS	3/10/2027

FAILS REPORT

4

LEVEL 1 KITCHEN					
HS0010	3/10/2026	TOASTER	SUNBEAM	Damaged lead	sub-total: 1

TOTALS REPORT

5

Fails	2
3PH Tests	0
SPH Tests	25
RCDs	2
TOTAL	29

Close-ups of the Appliance Register, Fails Report and Totals Report.

01 Check the customer. Confirm the site name, address and contact details.

02 Check your company. Confirm the company details, logo and tester names.

03 Check the register. Review tag IDs, dates, periods, items, results and retest dates, grouped by building and room.

04 Check failed items. In **Fails Report**, check the item and reason for failure. It is offered only when something failed.

05 Check totals. In **Totals Report**, compare counts and retest periods with the selected records. **RCD Report** shows trip times when RCDs were tested.

What happens next

Return with the back arrow, then export the report set. Emergency exit light and microwave reports appear when those records are included.

04 CLEVERMODE CLOUD

Make a report from cloud records

Use Clevermode Cloud when technicians sync their tests from the Clevermode phone app.

Sign in to the business account

- 01 Open Clevermode Cloud from Home.** If asked, sign in. You can also use the account button at the top right of Home, then **Sign in to Clevermode Cloud**.
- 02 Enter the account details.** Fill in **Account email** and **Password**. Admins leave **Username** blank. Team members enter the business account email and their own username.
- 03 Click Sign In.** The Cloud page shows the signed-in account. To sign out later, use the account button on Home and click **Sign out**.

Choose the tests

- 01 Refresh the records.** Click **Refresh**, then set **Group by** to **Site**. The cards show tester counts, buildings and a date range.
- 02 Select the groups for your report.** Tick the groups you need. Check the site, dates and test count. **Select all** selects all displayed groups; **Select none** clears the selection.
- 03 Continue with the selected tests.** Click **Continue with N tests**. N is the number of selected tests.
- 04 Check and export the report.** Follow pages 5–6: confirm the site details, review locations, preview a report and click **Export report set**.

Other ways to group records. Under **Group by**, choose **User**, **Day** or **Site + Day** when that makes the records easier to find. Check your selection before continuing.

No tests waiting? Ask the technician to open the Clevermode phone app with internet on, then click **Refresh**. Tests already marked **Completed** are left out of the waiting-for-report selection.

What happens next

Your report set is saved. Check it, then mark the reported groups Completed (page 9).

04 CLEVERMODE CLOUD

Correct records and finish reporting

You can correct editable cloud details and mark reported tests Completed without removing their QR tag pages.

Edit one cloud record

- 01 Open the test.** On **Clevermode Cloud**, find the test and click its row. Click **Edit** to open **Edit Cloud Record**.
- 02 Correct the editable details.** Change the appliance, brand, room or another editable field.
- 03 Save the change.** Click **Save**. Look for **Saved — the tag's QR page is updated**.

Printed label fields are locked. **Tag ID**, **Test Date** and **Retest Date** cannot be changed here. Correct them in the Clevermode phone app and reprint the tag there.

Mark reported tests Completed

- 01 Check that your reports are saved.** Open the report folder and confirm you have the PDFs you need.
- 02 Select the reported groups.** Return to **Clevermode Cloud** and tick only the groups you have finished reporting on.
- 03 Click Mark Completed.** The tests remain in the cloud and on QR tag pages. They leave the list waiting for a report for everyone in the business.

Permanent deletion. The trash icon, **Delete these tests from the cloud**, permanently removes the tests for everyone. Their QR tag pages will show no test. This cannot be undone. Use **Mark Completed** for finished reporting work.

Organise a site into jobs

The site menu includes **How this site is split into jobs**. The choices are **Whole site is one job**, **One job per building** and **One job per room (e.g. technician)**. Select the arrangement that matches the work.

Admins also have **Link Flowody**, which generates a key for Flowody's integration. For the normal Flowody reporting workflow, connect through **Report settings** as shown on page 11.

What happens next

The corrections are saved, and completed reporting work is cleared from the waiting list.

05 OTHER RECORD SOURCES

Combine sources or use a shared folder

Bring CSV exports and cloud records together, or set a shared export folder for Flowody jobs to read.

Combine CSV and cloud records

- 01 Add the CSV exports.** On **Create a report**, click **Choose files** and select the files for the site.
- 02 Add the cloud records.** Click **Add cloud records** and sign in if asked. Use **Find a site**, then tick the sites you need. **Select all** and **Select none** help manage the selection.
- 03 Confirm the sources.** Click **Add records**, shown with a count as **Add N tests**. Check **Selected sources (N)**, then click **Continue to site details**.

Check the sources so you include the intended tests once. Completed tests are not listed in the cloud selection pop-up. Continue through site details, locations and export as usual.

Choose a folder of CSV exports

- 01 Make the folder available on this computer.** It must appear as a normal folder. Google Drive for desktop, OneDrive, Dropbox, a network drive or a local folder can work.
- 02 Set the folder in Reports.** Open **Report settings** → **Exported CSV files**, then click **Choose folder...** and select the folder.
- 03 Check that the folder is being read.** Click **Check** to count CSV files changed in the last 180 days. Use **Change...** to select another folder or **Remove** to clear the setting. Changes save automatically.

Google Drive on your computer. On Windows, Google Drive for desktop is usually the **G:** drive, for example **G:\My Drive\Test exports**. On Mac, look in the Finder sidebar. Use the actual location on your computer; there is no direct Google sign-in in Reports.

A Flowody job can also read exports named after its site. Check the records and worker status on the job before proceeding. You can always use **Choose files** to select a CSV directly.

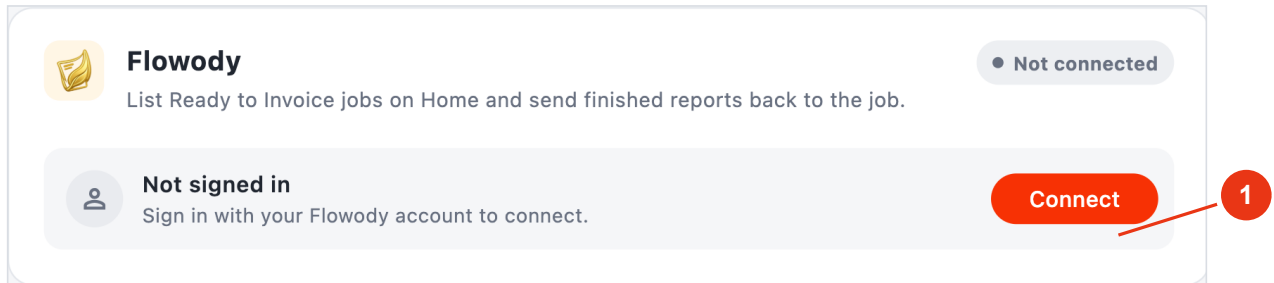
What happens next

Your chosen sources or shared export folder are ready for the next report.

06 FLOWODY

Connect Flowody

Connect once to start reports from Flowody jobs and attach the finished files to the job.



The Flowody connection is in Report settings.

Connect your account

- 01 Open Flowody settings.** From Home, click **Report settings**. Under **Flowody**, click **Connect**.
- 02 Sign in.** In **Sign in to Flowody**, enter **Email** and **Password**. Enter your **Two-factor code** if asked.
- 03 Choose the right company.** If your login belongs to several companies, select the one whose jobs should receive the reports.
- 04 Check the connection.** Check that the status shows **Connected**.

Set up the optional invoicing task

- 01 Choose whether to create a task.** In the Flowody settings, enable **Invoicing task** if you want a follow-up when a report is on the job.
- 02 Choose who receives it.** Under **Assign to**, click **Choose people**. Tick the team members and click **Done**. You can choose several people.

The task is named “Invoice JOB-... (report done)” and is due today. Each selected person is notified in Flowody. You can untick the task for an individual report after sending it.

The task prompts invoicing. Creating the task does not issue an invoice. Your team still completes the invoicing work in Flowody.

Manage the connection

You stay signed in for about a week without use. To disconnect, open **Report settings** → **Flowody** → **Sign out**. Invoicing-task settings save as you change them.

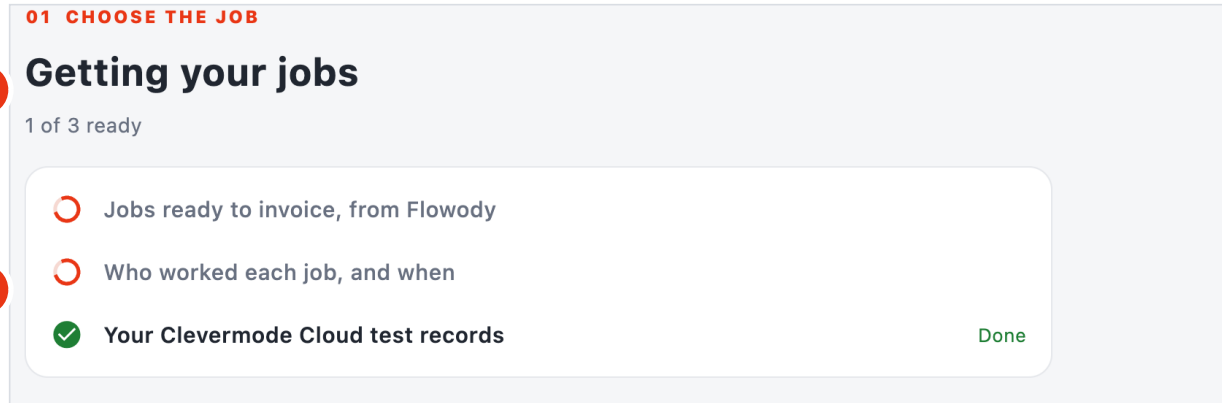
What happens next

Home now shows From a Flowody job. Continue to page 12.

06 FLOWODY

Choose the Flowody job

Start from **From a Flowody job** → **Choose job** on Home.



1 Read the progress. 2 Wait for the jobs, labour and cloud checks.

01 Read the loading progress. **Getting your jobs** shows **N of 3 ready** while the job information is collected.

02 Wait for the checks. The checklist covers jobs ready to invoice, who worked each job and when, and your Clevermode Cloud records.

03 Choose the correct job. In **N jobs to do**, check the customer, job number, type, date and address. These are Test & Tag jobs marked Ready to Invoice in Flowody that still need a report.

Jobs already finished. The green **DONE — N jobs reported and completed** section appears below jobs still to do. Jobs already reported and invoiced are hidden, with a count of those not displayed.

Need the latest list? Click **Refresh**. Read the worker and record status on each card before opening the job.

What happens next

The selected job opens at **02 CHOOSE THE RECORDS**. Check its records on page 13.

06 FLOWODY

Check the job records

Before creating the reports, confirm that the selected records cover the job's dates and workers.

01 Read 02 CHOOSE THE RECORDS. The page asks **Where are the test records for <site>?** Choose the source that matches the records found.

Option	Use it when
Use N tags recorded on the cloud	All the required records are in Clevermode Cloud.
Use N cloud tags + N from exported files	The job needs records from both sources.
Use N tags from exported files	The required records are in the exported CSV folder.
Choose CSV files	You want to select the files yourself.

02 Check the dates. Read **Tags from <dates> only**. The app uses the job's days from its schedule, labour log or job date and leaves records from other days out.

03 Check who worked the job. Read **Who worked this job (Flowody labour)** and confirm that each worker's tags were found.

If a worker's tags are missing

01 Choose Wait. Ask the technician to open the Clevermode phone app with internet on. If they use the old app, obtain their CSV export in the shared folder or select it with **Choose CSV files**.

02 Click Check again. Read the updated worker status. **Continue anyway** proceeds with the records available, so use it only after deciding that the report will contain what it needs.

Create the report set

Choose the records, then check the site details filled from Flowody. Click **Review locations**, make any corrections, then **Next**. Preview the report and click **Export report set**. Follow pages 5–6 for the common reporting steps.

What happens next

The job is ready for the report workflow on page 14.

06 FLOWODY

Send the reports to the job

Exporting saves the report set on your computer. Sending it to Flowody is a separate step.

Files are checked after upload. Wait for verification before treating the send as complete. **Check now** re-checks the files without resending.

01 Save the report set. Click **Export report set** and choose the folder where the PDFs should be saved.

02 Send the saved files. In the Flowody panel, click **Send N files to Flowody**.

03 Confirm the destination. At **Send this report set to Flowody?**, check the job and click **Send**.

04 Wait for verification. The files go to the job's Documents, called **Files & Photos** in Flowody, and the job's assignees are notified. The app downloads each file back to check it arrived intact.

05 Review the follow-up choices. In **Report sent to Flowody**, review both tick boxes:
Mark the N tests in this report Completed in Clevermode Reports
Create an invoicing task for <names> in Flowody

06 Apply the choices you want. Tick the required actions and click **Confirm**, or click **Not now** to leave those follow-up actions for later.

Check an upload again

Click **Check now** to re-check the files already sent without resending them. Look for the verified status before treating the upload as complete.

What Completed changes. The selected tests stay in the cloud and on their QR tag pages. They leave the list waiting for a report for everyone in the business.

What the invoicing task changes. The task is due today and assigned to the selected people. It tells your team the report is done and the job is ready for their invoicing work.

What happens next

The files are on the job in **Files & Photos**. The selected completion and invoicing follow-ups are applied when you click **Confirm**.

07 HELP

Troubleshooting

Start with these checks if you cannot find the app, records or saved files.

I cannot find the app on Mac

Search “clevermode” with Cmd+Space or **Launchpad**, or open **Applications**. The file is **clevermode_reports**.

The Flowody card is missing

Open **Report settings** → **Flowody** → **Connect**. **From a Flowody job** appears when connected.

A report is not offered

Only reports needed by the selected records appear. Check that the required test types and all intended records are included.

No cloud tests are waiting

The tests may be **Completed** or not yet synced. Ask the technician to open the phone app with internet on, then **Refresh**. Check the business account.

A worker's tags are missing

Check the job dates. Ask the worker to sync, or obtain their CSV export. Choose **Wait**, then **Check again**. See page 13.

A yellow warning appears

Read **Check this file before sending the report** and address each issue before sending. Use the support link below if needed.

Clevermode Reports support

When requesting help. Have the app version and the message you are seeing ready.

Where are the saved reports?

Inside the folder you chose, in a new folder named for the site, date and time. Click **Show folder** after saving.

Can I undo cloud deletion?

No. Deletion is permanent for everyone and QR pages will show no test. **Mark Completed** keeps the tests and QR pages.

Can I change tag IDs or dates?

Tag ID, **Test Date** and **Retest Date** are locked in Reports. Change them in the phone app and reprint the tag there.

Do I need Google Drive?

Only to use exports stored there as a computer folder. Local folders, network drives, OneDrive and Dropbox also work. See page 10.

Have files reached Flowody?

Wait for verification. Use **Check now** to re-check without resending. Find files on the job in **Files & Photos**.

Is it free and does it print tags?

The desktop app is free. It makes PDFs from captured records. Print tags from the Clevermode phone app.

REFERENCE

Your reports and saved records

A report set holds the applicable PDFs for one site and the records used to create them.

Report	What it shows
Appliance Register	Every tested item, with its tag ID, date, period, appliance, brand, result and retest date.
Fails Report	Failed items and the recorded reasons for failure.
RCD Report	Residual current device results and trip times.
Totals Report	Counts for fails, three-phase tests, single-phase tests, RCDs and the total, plus retest periods.
Emergency Exit Light Report	Emergency and exit lighting inspection results, when those records are included.
Microwave Leakage Report	Microwave leakage measurements and results, when those records are included.

Saved filenames

Appliance_Register.pdf · Fails_Report.pdf · RCD_Report.pdf · Totals_Report.pdf ·
Emergency_Exit_Light_Report.pdf · Microwave_Leakage_Report.pdf

Test_Records.csv contains the exact records behind the PDFs. Keep it with the report set. **Appliance Register** is always included; other reports appear when the records call for them.

Useful terms

Completed: reported cloud tests kept in the cloud and on QR pages, but removed from the waiting-for-report list.

Site details: the customer name, address, phone and email printed on the PDFs.

Locations: the site, building and room names used to organise records.

Cloud: Clevermode's online store of synced phone records.