Intuit Field Service Management ES

powered by corrigo

Client

for

Windows Mobile

User's Guide

Version 6.10 JRP 7/30/2010 1:01 PM

Contents

Intuit Field Service Management ES Mobile Client for Windows Mobile – User's Guide

Overview

This guide explains how to use the Intuit Field Service Management ES Mobile Client on the Windows Mobile device. A Windows Mobile handset is referred to as the "mobile device" throughout this guide. The following assumptions apply to the use of this guide:

- You have Internet access on your mobile device.
- You have a valid URL, user ID, and password for Intuit Field Service Management ES.
- You have the basic skills needed to operate your mobile device (please refer to your device user guide if necessary).

Using This Guide

Smartphone Users Smartphone does not offer touch-screen capability. An addendum for Smartphone users has been added to assist in Intuit Field Service Management ES navigation. Several Intuit Field Service Management ES screens will differ for Smartphone users.

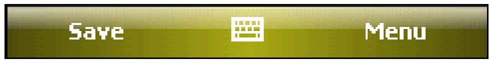
Conventions: The Intuit Field Service Management ES product you use will be referred to as **Field Service Management**, **Client,** or just the **application** within this guide.

Tap: To "tap" means to touch the screen with the stylus.

Note: Smartphone users do *not* have the ability to "tap" the screen while navigating programs. When this guide directs you to "tap", Smartphone users will need to press the appropriate phone key instead. See the Smartphone Users Addendum in the back of this guide for details.

Highlight: To highlight a screen or menu item on your mobile device, move the cursor by tapping the screen or using arrow keys  until the item borders change color.

Save: The left soft key will be the Save key when the program requires you to save data that you have entered.



Tap it once to save.

Detail Screen: In this guide, the Detail screen refers to the Summary tab of a job you have selected.

Appearance: Since Field Service Management can be configured to fit your company's needs, and appearance may differ between types of devices, screens on your mobile device may appear slightly different than examples in this guide.

Terminology: Since your company can customize Field Service Management software by changing specific words and phrases used on the screens, some terms used in this guide may not match terms on your screens. For example, this guide occasionally uses the phrase Work Order (WO), but your company may use a phrase such as Service Ticket (ST).

Application Menu: The Application Menu is a list of options that can be accessed from any Field Service Management screen. To launch it, tap Menu (right soft key). In this guide, menu options will be written in path form. For example, **Menu > Actions > Pick Up** means tap Menu, then tap Actions, and then tap Pick Up.

System Administrator: Person at your company who manages your Field Service Management program.

Navigating Field Service Management

Launching the Application Menu: To view a list of options from any screen within Field Service Management, , ***tap*** Menu (right soft key). to launch the Application Menu:

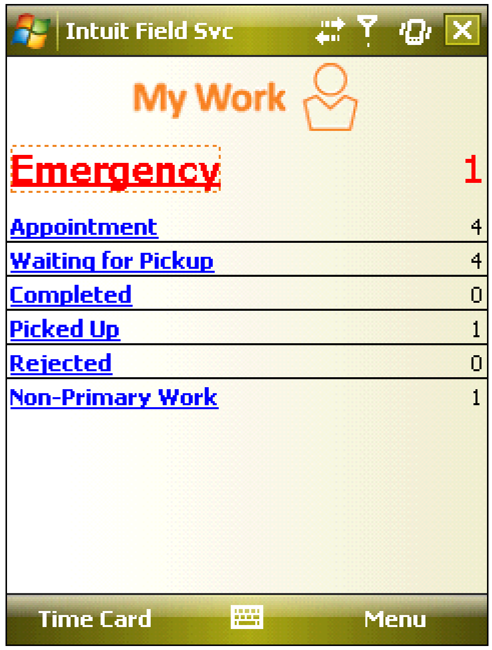


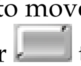
Figure 1: Example of Application Menu on the My Work screen

Note: The options available on the Application Menu vary depending upon which screen is displayed.

To Select: When you select a screen item or menu option, you launch the program or action it represents**.**

- To select a menu item, *tap* it once.
- To select most screen items, *tap* once.

Note: Smartphone users do *not* have the ability to "tap" the screen while navigating programs. When this guide directs you to "tap", Smartphone users will need to press the appropriate phone key instead. See the Smartphone Users Addendum in the back of this guide for details.

- **Alternative:** You can also use arrow keys  to move to and highlight a screen or menu item, then press enter  to select.

Note: Some screen items require **two taps** (double tap). If you are directed to *select* a screen item in this guide, assume that you tap it once. If it is necessary to double tap an item, the guide will specifically direct you to do so.

System Requirements

Device System requirements: Intuit Field Svc. Mobile Client for Windows Mobile is compatible with devices that meet these system requirements:

Operating System	Windows Mobile 5 or Windows Mobile 6
Screen	Touch and Non-Touch screen Supported Resolutions: 240x240; 240x320
Program Memory	At least 10 MB of Available Program Memory to launch the application
Storage Memory	At least 20 MB of free Storage Memory for installation

For a current list of devices supported please refer to http://enterprisesuite.intuit.com/products/field-service-management/?fsmes_info=technical#fsmes_info_tabs.

Installing the Application on the Mobile Device

To install Field Service Management on your mobile device, point your Internet Explorer browser (on your phone) to http://qbes.mobile.corrigo.com and follow the prompts.

Accessing the Application

Logging In

1. Turn on your mobile device. Tap Start > Programs. Tap the Field Service Management icon to launch the application.

Figure 2: Tap Start > Programs (left diagram), then tap the Intuit Field Svc icon to begin

2. After a brief delay, the login screen will appear.

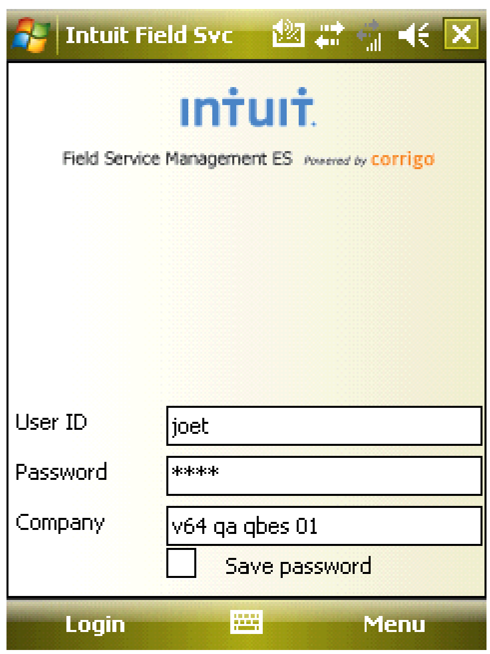


Figure 3: Login screen

3. Enter login information (which you can obtain from your system administrator).

4. Tap login when done. After several status messages, your My Work screen will appear.

Setting Up Auto Login: You can configure your mobile device to bypass the login screen when you turn it on or when you select the Field Service Management icon. To configure auto login:

1. While at the login screen, select Login Options from the Application Menu <or> while at the My Work screen, select More > Settings > Login from the Application Menu.

2. Select "Automatically login me in next time". The next time you select the Field Service Management icon from the Programs folder (or wherever it is installed), you will be taken directly to you're my Work screen without entering your User ID, Password, and Company.

   Note: Selecting only "Save Password" will save your login information but require you to tap Login after selecting the Field Service Management icon.

3. Select Save (left soft key).

Caution: *Do Not* change the service address unless directed by your system administrator.

Logging Off

- To log off, select Exit from the Application Menu. Answer "Yes" when prompted.

My Work

Overview

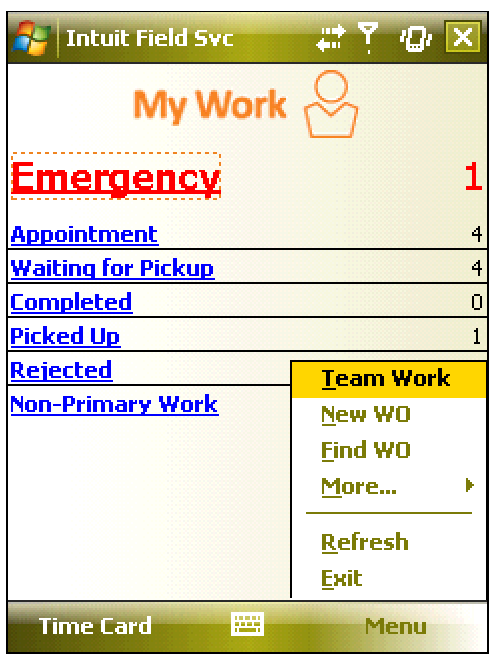


Figure 4: My Work screen

The My Work screen appears upon login. This is a list of work assigned to you, organized in categories.

Category	Explanation	Helpful to Know
Waiting for Pickup	These jobs have been assigned to you and are waiting for your acknowledgement.	To acknowledge these jobs, change the status to either Picked Up or Rejected.
Picked Up	These are the jobs for which you have taken responsibility.	Jobs that have been cancelled or are On Hold are not tallied here.
Completed	These are the jobs you have completed.	Once completed, a job is no longer tallied in the Picked Up category.
Appts (appointments)	These are jobs with set appointment times, or jobs that require a call to the customer.	Unscheduled or Needs to be Scheduled jobs do not appear here. Jobs can be tallied in this and other categories at the same time.
Rejected	These are jobs that you cannot or choose not to accept.	The dispatcher and supervisor will see that these jobs have been rejected.
Non-Primary Work	These are work orders where you have been assigned as a secondary tech.	To post times on these work orders, select menu and mark en route, start/end work order time from the non-primary work list or from a non-primary work order details page.
Emergency	These are high priority jobs that require a response.	This category appears on the My Work screen if emergency jobs exist. Your company may use a term other than emergency to describe category.

Viewing a List of My Work

Select any category on My Work to access a screen listing individual jobs in that category.

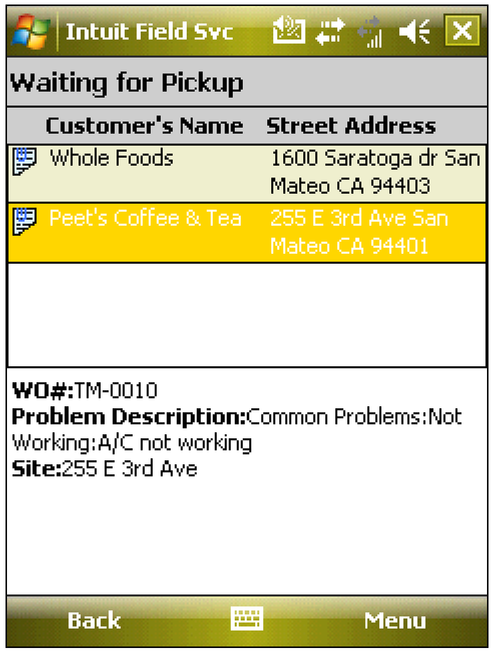


Figure 5: List of jobs Waiting for Pickup

A summary of Detail for the highlighted job appears at the bottom of the screen. As you scroll through the list, the Detail will change as the highlighted job changes. The types of information fields that appear on this list depend on which My Work category you choose. Your company can customize this screen to fit its business needs by selecting which information fields will appear.

Viewing Detail of a Job

To view the Detail of a job:

1. Select a category of jobs from your My Work screen. If you are starting work for the day, you would typically select the Waiting for Pickup category to see new jobs assigned to you.

2. Double tap to select the job. A screen containing job Detail will appear.

Note: Smartphone users please refer to the Smartphone Users Addendum in the back of this guide for device-specific information.

Not all available Detail fields may appear on your screen. Which fields appear depends upon the way your company has chosen to configure Field Service Management.

Many of the fields can be selected and modified from the mobile device. Fields are divided by tabs at the bottom of the job detail screen. Some of the critical fields which may appear in Work Order Detail are listed in the following table:

Detail Field	Description	Helpful to Know
Status:	Describes the current state of the job to the dispatcher and field supervisor **Note:** Status appears on upper right of screen, above job Detail.	Select Menu > Actions to change status. Options available depend upon the current status of the job.
Summary Tab		
WO#:	Number used to identify job and invoice (if an invoice is created)	May be labeled… • Service Ticket (ST#) • Service Request (SR#) • Service Order (SO#) • Work Order (WO#)
Customer:	Name of customer (select this field to view Customer Contact Detail)	May be labeled… • Client • Guest • Resident • Tenant • Customer
Customer Detail:	Screen containing name, phone number, and email address of Customer Contact **Note:** To view this screen, select Customer name from the Summary Tab.	You can… • Call customer from your mobile device by selecting phone number • Email customer from mobile device by selecting email address
Flagged Reason:	Work Order flag reflects if you need assistance, parts, information, etc.	Field appears in Work Order Detail when a flag is set.
ETA:	Estimated Time of Arrival	You may enter your ETA from the mobile device to inform the dispatcher of when you'll arrive.

Detail Field	Description	Helpful to Know
Problem Description:	Description of problem from dispatcher, based on customer's comments **Note:** If multiple problems exist, the problem details will be listed on its own tab labeled Line Items.	Selecting this field displays a list of job tasks. Select each task and mark Done as you complete it.
(Custom Fields)	Fields created by your company to fit the needs of its workflow.	Since these fields are created by your company, they can have any name and description. See your system administrator to learn more.
Work Done Tab		
Work Done Description	Notes that summarize how job was completed	You enter notes here that can be used to create an invoice and to help service techs who work on site in the future.
Equipment:	Equipment on customer site for which you want to track a service history	Selecting this field allows you to choose and enter Detail on existing equipment, or to add new equipment.
Invoice Tab		
Invoice:	Reflects invoice amount once an invoice is created. You can create an invoice from the mobile device.	Select this field to create an invoice. The Invoice tab will not appear if the job has not been made Invoiceable. See Creating an Invoice in this guide for additional information.
Notes Tab		
Notes:	Any notes attached to the work order.	Select the type of note you want to add from the Application Menu.

On the Job

Overview

You will interact with Field Service Management at several key stages as you work. This section will outline the most common points during a work cycle that you will need to use your mobile device.

Typically you will begin any interaction from your My Work screen.

Note: Not all of the fields described in this section will appear on your mobile device. Your company can customize Field Service Management to fit its business needs. The screens you see on your mobile device have been organized by your company to fit the work flow you normally encounter.

Responding to a New Job Assignment

My Work organizes your job assignments so that you can effectively respond to and process them. To respond to a new job assignment:

1. Select the Waiting for Pickup category from your My Work screen.
2. Double tap the job you want to select it.
3. Select Actions from the Application Menu to view a list of available statuses.
4. Change the status of job appropriately. Some typical choices:
    - *Select Pickup* if you want to accept responsibility but are not on site.
    - *Select Pickup and Start* if you are on site and ready to begin.
    - *Select Reject* if you cannot accept the job.

Understanding Job Status

As you progress through your work, you will need to update the status of the job. This will inform the dispatcher and field supervisor about your progress.

The following table is a summary of the statuses available:

Status Options	Description	Available When the Current Status Is…
Pick Up	Accept responsibility for a job, though not in a position to begin work	• Waiting for Pickup

Status Options	Description	Available When the Current Status Is…
En Route	Traveling to a job	• Picked Up • Work Started • Paused
Start	Begin work	• Picked Up • En Route • Paused
Pick Up and Start	Accept responsibility for a job *and* begin work	• Waiting for Pickup
Pause	Halt work temporarily (for example, lunch break)	• En Route • Work Started
Set Flag/ Remove Flag	Continue working, but alert dispatcher and field supervisor to a need or concern (select a reason from a pop-up options list)	• Waiting for Pickup • Picked Up • En Route • Work Started • Paused • On Hold
Reject	Cannot accept a job (dispatcher and field supervisor will see rejection)	• Waiting for Pickup
On Hold / Re-Open	Cannot continue work and need assistance (select a reason from a pop-up options list)	• Waiting for pickup • Picked Up • En Route • Work Started • Paused • On Hold • Complete
Cancel /Re-Open	Close the job without completing it. (select a reason from a pop-up options list)	• Waiting for pickup • Picked Up • En Route • Work Started • Paused • On Hold
Complete	Job finished	• En Route • Work Started • Paused • On Hold

Changing a Job Status

To change a job's status:

1. Go to the Detail screen of the job you want to change (see Viewing Detail of a Job or Searching for Jobs in this guide for additional information).
2. Select Actions from the Application Menu to view a list of available statuses.
3. Select Status from list of options.

Flagging a Job for Assistance

You may need to alert your supervisor about an important job condition while you continue work. To do this, set a flag for that particular job:

1. Go to the Detail screen of the job you want to change.
2. Select Actions from the Application Menu to view a list of available statuses.
3. Select Set Flag from list of options. A list of flag Reasons will appear.
4. Select a Reason.
5. Enter Notes to inform dispatcher and supervisor why you need assistance.
6. Select Save (left soft key). Your dispatcher and supervisor will be able to view flags set on your work orders.

Entering and Viewing Notes

While you are working, you may encounter situations that you need to describe to your dispatcher, field supervisor, or service techs who may work on that site in the future. You can enter notes into Field Service Management that will become immediately available to anyone with access to your job information.

To enter notes:

1. Go to the Detail screen of the job you want to change.
2. Select the Notes tab at the bottom of the Detail screen.
3. You can access any existing notes from this screen.
4. To add a note, select the type of note from the Application Menu.

Note: Select Edit from the Application Menu while entering notes for a list of edit options.

5. After you have entered the note, select Save (left soft key).

Viewing Work History for the Customer

You may need to see Detail of work that has been completed previously at that customer site. To view a history of work at that site:

1. On the Detail screen for an order, scroll to the Service Location field for that customer's site.

2. If there is work history for this customer, the field will state "Site Service" (the label on your screen may differ). Select this field.

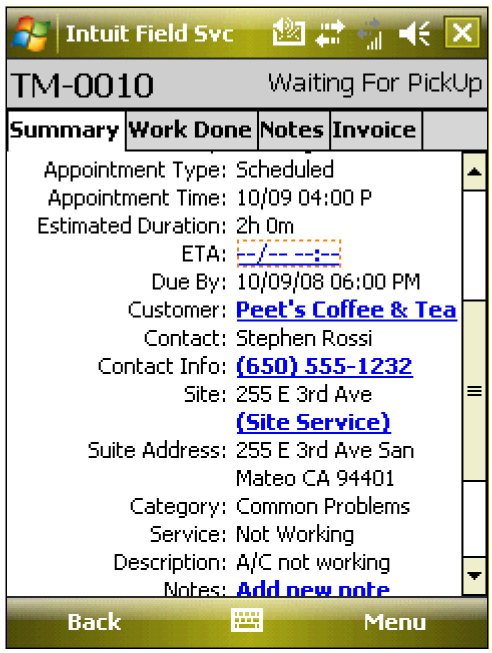


Figure 6: View Service Location History

3. If records for several previous jobs exist for this customer, a list will appear. Highlight a job to view, then tap Select (left soft key). If there is only one previous job, Detail of that order will appear.

   Note: Details from job History appear with a colored background so that you can distinguish them from your current job Detail.

4. When you are done viewing Detail, select Back from the Application Menu (or tap the left soft key).

Tracking Equipment at a Customer's Site

You may want to track the service and installation history of equipment located at a customer job site for warranty purposes or reference on future service calls . To track equipment:

1. Go to the Detail screen of the customer's job. Select the Work Done tab at the bottom of the screen.

2. If equipment has already been entered for that site, a brief description of the equipment will be listed. Select the equipment you want to view or edit.

   Note: If no equipment has been entered, <Select> will appear next to the equipment field. Tap <Select> to view options.

3. The Equipment Attribute screen will appear. Review Detail by scrolling to each field and selecting it. If you are updating information, enter the new Detail, then select Save (left soft key).

   Removing Equipment: You can also remove equipment by selecting Remove from the Application Menu on the Equipment Attribute screen.

4. To add new equipment, select Create New Equipment from the Application Menu.

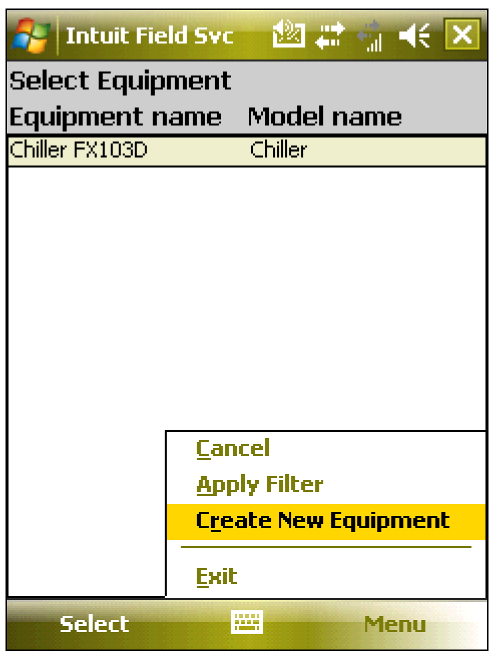


Figure 7: Create New Equipment option on Menu

5. Once Create New Equipment is selected, a list of equipment models will appear (this list has been customized by your company). Highlight the type of equipment you want to add and tap Select (left soft key).

6. The Edit Equipment Details screen will appear. The attributes listed will vary according to which type of equipment you select.

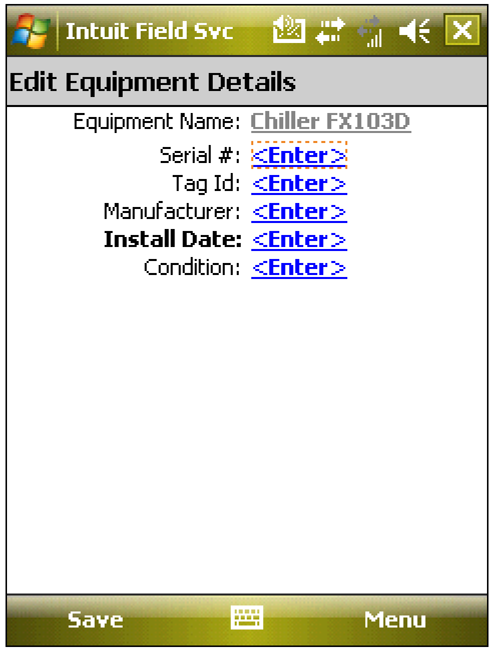


Figure 8: Sample Edit Equipment Details Screen

7. Enter a name for the equipment.

8. Scroll to each field, select it, then enter attributes. Select Submit (left soft key) for each attribute as you complete entry.

9. Select Save (left soft key) when done.

Checking Equipment History: You can also view the history of equipment that has been added at this site by selecting "Equipment Service" next to the Equipment field on the Work Done screen.

Completing a Job Assignment

Overview

Once you have completed your work, there are several steps you need to take to close out the job in Field Service Management.

Problem Disposition

Whether you have completed the entire job or just one or more tasks within the job, you can mark the work you have completed as Done within Field Service Management.

1. On the Detail screen for the completed job, scroll to the problem Description field.

2. *If you cannot select the field*, then there is only one task associated with this job and the problem disposition will be marked Done when you change the job status to Complete (see Setting Status to Complete in this guide).

3. *If you can select the field*, then there are multiple tasks associated with this job. Select the field to see a list of tasks (you can also select the Line Items tab at the bottom of the screen). A list of descriptions of job tasks will appear.

4. As you complete a task, select it in the multi-item list to reach the Line Items details.

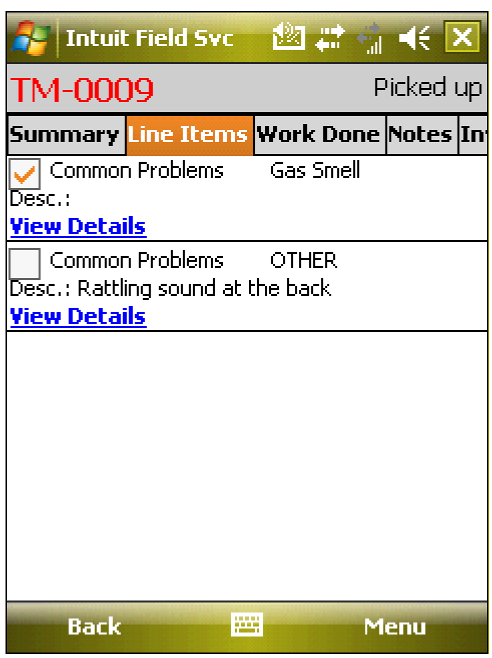


Figure 9: Problem Disposition screen

5. Select Disposition.

6. Select from the options available: Done <or> None (ongoing)

7. Review the multi-item screen to dispose of additional tasks, or select Back (left soft key) to return to the Detail screen.

Entering Work Done Description

When you have completed the job, enter notes into the system to describe the work you did.

1. From the Detail screen for the job, select the Work Done tab at the bottom.

2. Select Work Done Description.

3. Enter a description of the work you have completed. This information can be used to create an invoice and for reference on future service visits.

4. Select Save (left soft key) when done.

Setting Status to Complete

When you have finished your job, you need to change the status of the job to Complete.

1. Go to the Detail screen for the order you want to complete.

2. Select Actions from the Application Menu to view a list of available statuses.

3. Select Complete from the list. The Completion Summary screen will appear.

4. The Work Done Description screen may appear.

   Note: Follow instructions from the Entering Work Done Description and Tracking Equipment sections of this guide if you need to enter a Work Done Description or track equipment you have serviced.

5. Scroll to Repair Code and select if the option is available. The Repair Category screen will appear. Select a Repair Category.

6. On the next screen, you may be asked to select a Repair Code. If so, scroll to the appropriate code and select it. You will be returned to the Complete Work Order screen.

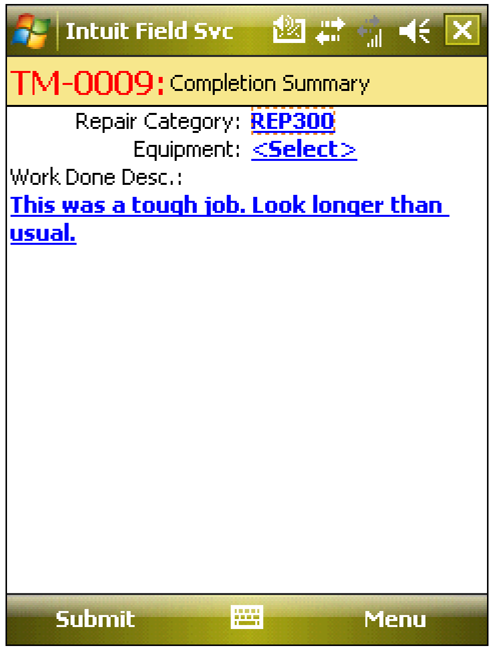


Figure 10: Completion Summary screen

7. Select Submit (left soft key). The job status will be changed to Complete.

Creating an Invoice

Depending upon your company's business practice, you may need to create an invoice at the customer's site. To create an invoice from your mobile device:

1. From the Detail screen for the job, select the Invoice tab at the bottom of the screen.

   Note: If no Invoice tab exists, then this job has not been marked Invoiceable. To make this job Invoiceable, Select the Invoice Totals field on the Detail page, then answer "Yes". An Invoice tab will now appear at the bottom of the screen.

2. Select to Add New Line Item.

3. Highlight a category and tap Select (left soft key). Choose from :
   - Labor
   - Parts
   - Miscellaneous
   - Price List

5. *If you are entering a Price List item or Price List Group*: Select a Search category from the Invoice Item Search screen to find your Price List item or group. Enter search criteria, then tap Search (left soft key) to start search. A list of Price List items/groups will appear. Highlight the item you want and tap Select (left soft key).

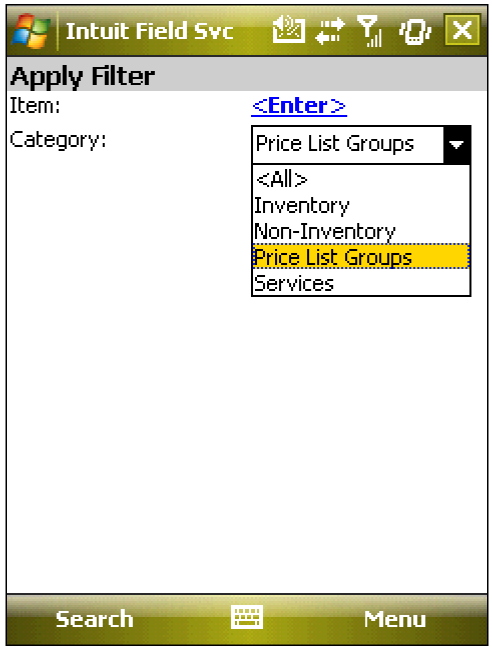


Figure 11: Searching for Price List Items

6. Enter the quantity, Description, and Rate for the line item.

7. Select Save (left soft key) when the line item is completed. Continue until all line items are entered.

8. Select Discount and Tax fields if necessary. Enter a percentage or set amount.

9. Select Save (left soft key) as tax and/or discount are entered.

   Note: The discount percentage you enter will be taken on the full invoice amount.

10. Select any other invoice fields you may need to change. Select and edit. Select when completed.

11. At the top of the Invoice screen, select Invoice Status.

12. Select Prepared from the options list. Select Save when completed. The invoice is now complete.

Additional Features

Searching for Jobs

You may need to find a specific job. Field Service Management allows you to search by Work Order #, Customer, and Requestor (contact) from your mobile device (your mobile application may use different terminology). To search for a work order (job):

1. While on the My Work screen, launch the Application Menu.
2. Select Find WO (this description may read Find ST, Find SO, or Find SR on your mobile device).
3. Enter search criteria under WO Number Contains, Customer Contains, or Contact Contains.
4. Select Search (left soft key).
5. Select the work order you seek from the list of results.

Updating Information on your Mobile Device

Information entered by the dispatcher is sent to your mobile device at regular intervals (set by your system administrator). If you want to check for or send updates immediately, you can refresh your device:

- Launch the Application Menu and select Refresh (this option is available on all top-level screens)

Contacting Customers

Field Service Management enables you to call or email a customer directly from your mobile device. To call or email:

1. Go to the Detail screen of a job for the customer you need to contact.
2. Select the Customer field. The customer Detail screen will appear displaying information for Contacts.
3. *To call the customer contact from your mobile device*: Select the phone number.
4. *To email the customer contact from your mobile device*: Select the email address. An email entry screen will appear. Email options are available on the Application Menu. Select Send (left soft key) when done.

Collecting Payment on an Invoice

Depending upon your company's business flow, you may need to collect payment from the customer. Field Service Management allows you to enter payment collection through your mobile device.

Note: Smartphone users may want to refer to the Smartphone Users Addendum in the back of this guide to review minor changes to screen information.

To collect payment:

1. Go to the Detail screen of the job for which you need to collect payment.

2. Select the Invoice tab at the bottom of the screen.

   To Obtain an Invoice Signature: Select Sign Invoice from the Application Menu. Obtain customer signature on mobile device, select I Accept, then select Submit (left soft key).

3. With the Invoice screen displayed, select Pay Invoice from the Application Menu.

   Note: Job Status must be marked Completed in order for the Pay Invoice option to appear. Job Status is listed on the upper right of the Detail screen. See Changing a Job Status in this guide for information on how to change status.

4. On Pay Invoice (1 of 3) select the payment method.

5. Click then select Next (left soft key).

6. On Pay Invoice (2 of 3), enter the information requested.

7. Click then select Next (left soft key).

8. On Pay Invoice (3 of 3), select Email Receipt from the Application Menu if the customer would like a receipt emailed.

9. When you are finished, select Done (left soft key).

10. *Optional:* To print the invoice (if you have a printer attached to your mobile device), select Print from the Application Menu.

Receiving Alerts

When situations arise that require your attention, you may receive alerts if your user profile is configured for alerts. Typically alerts are sent when emergency work is assigned to you. Depending upon your user profile, you can also receive alerts:

- To remind you of appointment times
- When work is assigned to you
- If work is re-assigned
- If your work is cancelled
- If your appointments are approaching overdue
- If jobs assigned to others are:
  - Flagged
  - Overdue

- Missed appointments

Typically an alert will come to your mobile device as a pop-up screen showing a summary of work order (job) information. You can select View Detail, or select Dismiss, from the alert screen.

You can also receive alerts via email. See your system administrator and supervisor for more information about receiving alerts.

Working Offline

Occasionally you may travel to areas that are outside the service range of your mobile device. Field Service Management allows you to perform most of your tasks offline. When you re-enter a service area, Field Service Management will update with the dispatch center all the information you entered while offline.

Creating an Offline List

If you know you will be entering an area where your mobile device will not have service, you can download information for selected jobs to your device so that it will be available to you when your device is offline.

Note: Simply opening the Detail screen of a job also downloads information for that specific job so that it can be available offline.

To Create an Offline List:

1. While on your My Work screen, select More > Offline List from the Application menu. A list of jobs will appear.

2. Select / Unselect individual jobs by tapping checkbox next to job

   <or>

   Select View from the Application Menu. Options available include:

   - Select (or Unselect) All
   - Select Emergency
   - Select New
   - Select Open

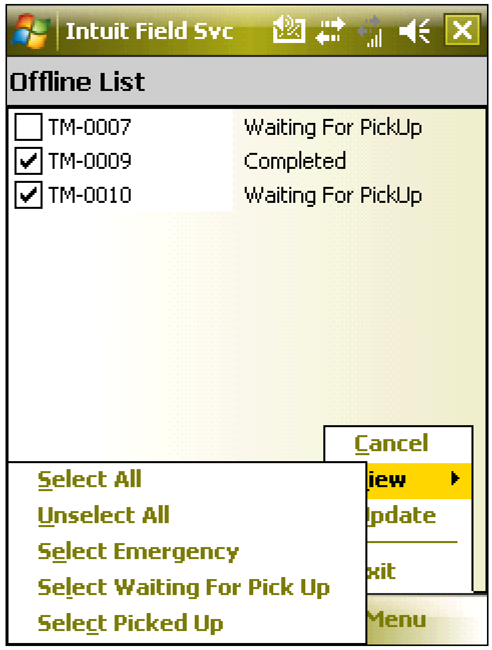


Figure 12: Application Menu options from Offline List

3. Select Save (left soft key) to download job information to your mobile device for selected jobs.

Configuring Your Device

You can configure Field Service Management to work with external devices that are attached to your mobile device (to learn how to attach external devices, such as printers, refer to the documentation for the specific device as well as your mobile device).

Note: Smartphone users please refer to the Smartphone Users Addendum in the back of this guide for device-specific information regarding settings.

Configuring Your Printer

To configure Field Service Management to work with your printer:

1. Access the Application Menu, then select More > Settings > Print

2. Select the printer that is attached to your mobile device and the port through which it communicates.

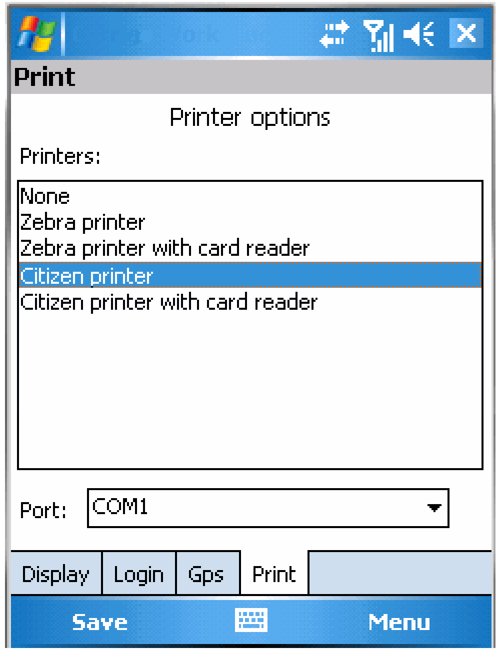


Figure 13: Print setup screen

3. Select Save.

GPS Setup

If you have GPS paired with your mobile device, you can configure it to work with Field Service Management. To configure:

1. Access the Application Menu, then select More > Settings > Gps
2. Tap the checkbox next to GPS enabled to select it.
3. Select a communications port from the Apply drop down menu.

Note: the communications port you select *must* match the outgoing serial port you selected in the Bluetooth setup manager.

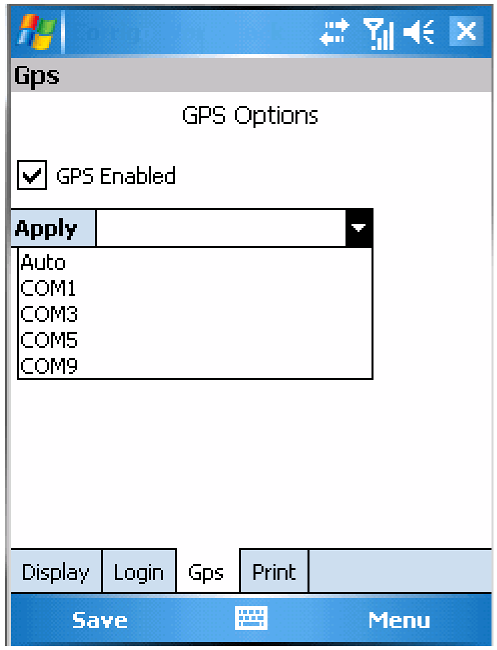


Figure 14: GPS setup screen

4. Select Save.

Supervisor Information

Overview

Mobile users who have a Field Service Management role of field supervisor or manager are able to view and take critical actions with regard to the work of others within a team (to learn more about user roles and team assignments, see your system administrator).

Monitoring your Team's Workload

Several features within Field Service Management allow you to stay informed about the progress of your team's jobs. The main screen for monitoring and managing jobs is the Team Work screen.

- To access the Team Work screen, select Team Work (left soft key) from your My Work screen (option available only to field supervisors or managers).

Key management categories on the Team Work screen:

- **Unassigned:** Lists any jobs from your dispatch center that have not yet been assigned to a tech. You can review and assign these orders from your mobile device

- **Flagged:** Lists orders that have been flagged by techs or a dispatcher. Techs will flag orders if they require assistance but are still working on the job.

- **On Hold**: Lists orders placed On Hold because an issue has arisen in which the tech cannot continue work. Only a supervisor can Re-Open a job that has been placed On Hold.

Other categories include: Waiting for Pickup, Picked Up, Completed Today, Cancelled Today.

You can also stay informed about the progress of your team's work through Alerts. As a supervisor, you can be alerted through your mobile device to the following team issues:

- **Flagged orders**

- **Overdue jobs**

- **Missed appointments**

Alerts can be configured to send a message directly to Field Service Management on your mobile device as well as to your email account.

Using Team Work

The Team Work Screen lists jobs sorted according to status. This screen can be filtered to view workloads by team or dispatch center. Select categories on this screen to view lists of jobs or techs.

To access this screen:

1. Select Team Work (left soft key) from your My Work screen.

2. A screen summarizing the work assigned to your team(s) will appear.

3. Select a status category to view a list of individual orders

   <or>

   Select View Workload to see a list of techs and the number of jobs assigned to each of them.

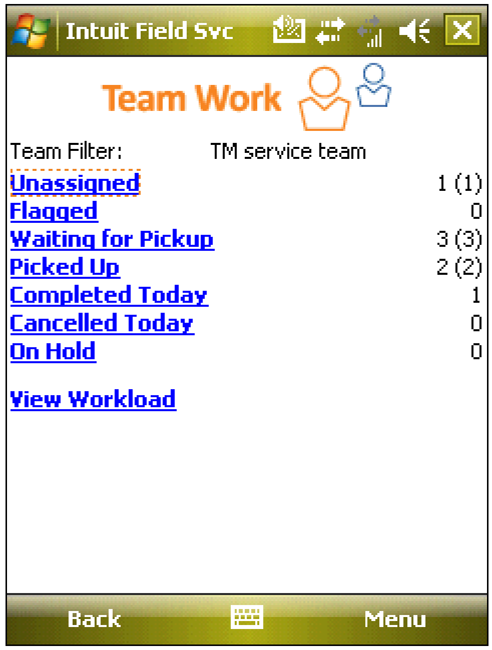


Figure 15: Team Work screen with work grouped by job status

Filtering Workload Lists

Note: Smartphone users please refer to the Smartphone Users Addendum in the back of this guide for device-specific information regarding Team Work filtering.

To filter the Team Work list for a particular service team or dispatch center:

1. Select Team Filter at the top of the Team Work screen.
2. Select the team or dispatch center you want to view.

Note: You can also filter a list of jobs of a particular status by selecting a status category from the Team Work screen, then selecting Team Filter from the Application Menu. For example, select Waiting for Pickup from the Team Work screen, then filter the list that appears.

Viewing Individual Workloads

To view a list of techs by the amount of work assigned to them:

1. While on the Team Work screen, select View Workload.
2. Select Apply Filter from the Application Menu.
3. Tap Select option, then choose either Less Than or Greater Than.

   Select Less Than to see a list of techs assigned less than a certain number of jobs (job count).

<OR>

Select Greater Than to see a list of techs assigned more than a certain job count.

4. Select Count field and enter job count.

5. Select Apply (left soft key).

For Example: If you want to view a list of techs with less than 2 jobs assigned to them, select Less Than, then enter a Count of 2.

Searching for Team Jobs

As a supervisor, you can use the Field Service Management search function to find orders that belong to your team members. See Searching for Jobs in this guide for information on how to search.

Reassigning an Order

To reassign a work order:

1. From the Team Work screen, select a status category of work orders, or select View Workload, and then select a tech by double-tapping the name.

2. Highlight the work order you want to reassign.

3. From the Application Menu, select Actions→Edit Assignment. The Edit WO Assignment screen will appear.

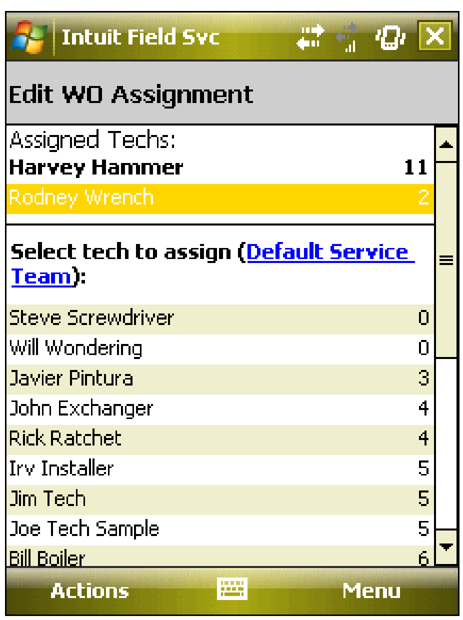


Figure 16: Edit WO Assignment screen displaying primary, secondary and all available techs

4. From the Edit Assignment screen, select Change Sort from the Application Menu to change the sort order
   <or> Select Change Filter from the Application Menu to select a new team to view

5. Select the Tech whom you want to un-assign and select Remove from the Actions menu

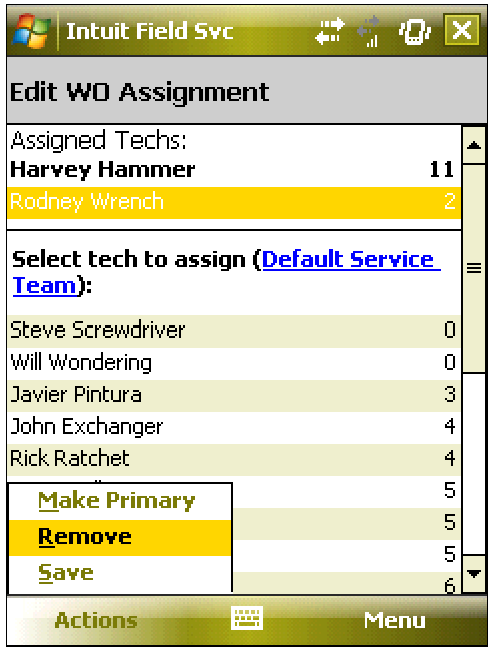


Figure 17: Edit Assignment screen showing the option to remove assignment

6. Select one of the techs from the available techs listed below in Edit Assignment screen and select Make Primary or Make Secondary depending on how you want to make the assignment

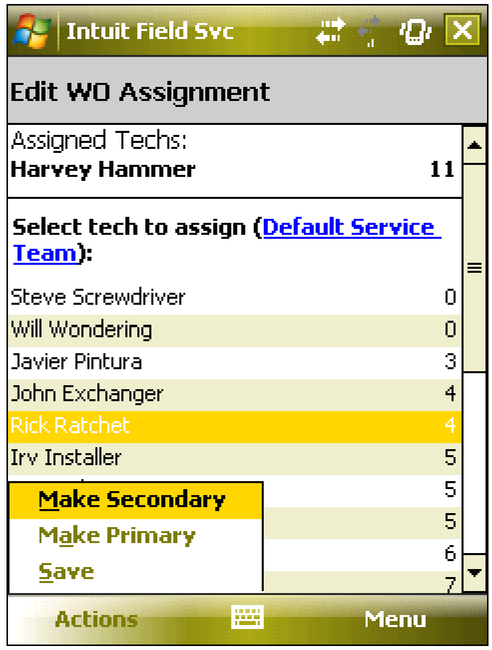


Figure 18: Edit Assignment screen showing the option to make another tech as a secondary

7. Once you are done with reassigning select Save from the menu

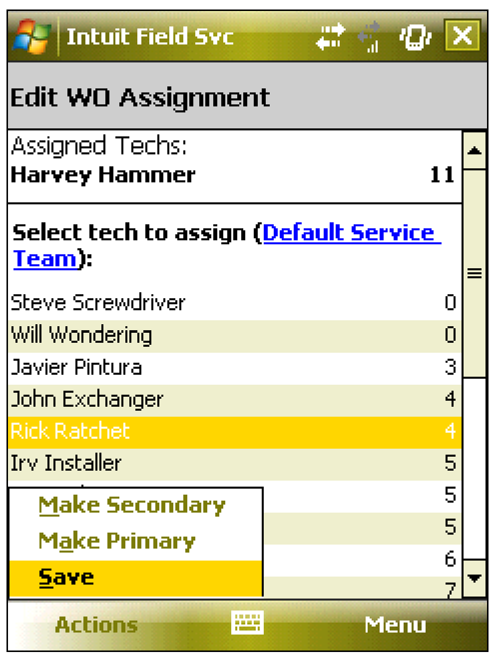


Figure 19: Edit Assignment screen showing option to save reassignment

8. You will then be given the option to view work order Detail or return to the previous screen

Note: You can also reassign a work order from the Detail screen of the work order.

Configuring Field Service Management

You can configure Field Service Management to fit your work flow needs. The mobile device screens and function can be changed in several ways:

- **My Work screen:** Status fields that appear on this list can be added / removed. Also, you can configure the fields on the summary preview screen for each status category.
- **Note**: Emergency orders will always appear on the My Work screen
- **My Work Detail:** More than 20 fields are available for display on the Detail screen. Fields can be added / removed as well as arranged within the Detail list.
- **Information Updates**: Configure how frequently job information and GPS fix is updated.
- **Auto Login**: Configure all users to be automatically logged securely into Field Service Management without having to type in login information.

In addition, mobile device users can be configured to:

- Receive Alerts regarding their work (see Receiving Alerts in this guide)
- Work on specific teams
- Be assigned work from specific dispatch centers
- Be listed in searches according to the skills they have

Categorizing mobile users by team, dispatch center, and skill will help you sort and assign work more easily. See your system administrator for Detail on how to configure users and mobile devices.

Creating a Job

Your business practices may require you to create jobs in the field. Field Service Management allows you to do this from your mobile device. To create a job:

1. From your My Work screen, select Create New WO from the Application Menu. The Select Customer screen will appear.
2. Select the Search By field and choose a criteria by which you want to search from the list of options.

3. Select the Pattern field and enter at least two characters of the name, number, address, etc.

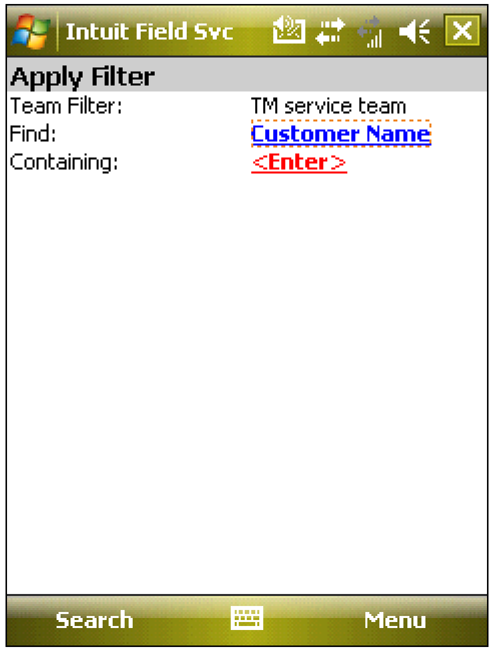


Figure 20: Select Customer while creating a work order

4. Select Search (left soft key). Highlight your customer from the Search Results, the tap Select.

5. Highlight WO Subtype then tap Select (Request is the most common).

6. Highlight a problem category from the Select Category screen, then tap Select.

7. Highlight which Service to perform for the problem, then tap select. Enter a Description and select Save (left soft key).

8. The Review and Confirm screen will appear. After reviewing information, select Create (left soft key).

9. Select Refresh from the Application Menu to update the job data and make information available to the dispatch center.

Tip: If you need to create a job for a customer who your company has already serviced, you can save time by copying the details of the previous job:

Go to the Detail screen of the customer's previous job, then select Tools > Copy WO from the Application Menu (your screen may use a different term).

Update relevant information on the Review and Confirm screen, then select Create (left soft key). An offline job will be created on your device. You can update this new order with the dispatch center by selecting Refresh from the Application Menu.

This method can also be used to create jobs on your mobile device when you are out of range of service.

Creating a Work order for a New Customer

There could be situation where a Tech received an emergency call in the weekend for a new customer. In order to create a work order, that customer needs to be created first. Here are the steps to create a new customer:

1. From your My Work screen, select Create New WO from the Application Menu. The Search Customer screen will appear. You can search to see if the customer is already in the system. If not you can select 'New Customer' from the menu in Search Customer screen

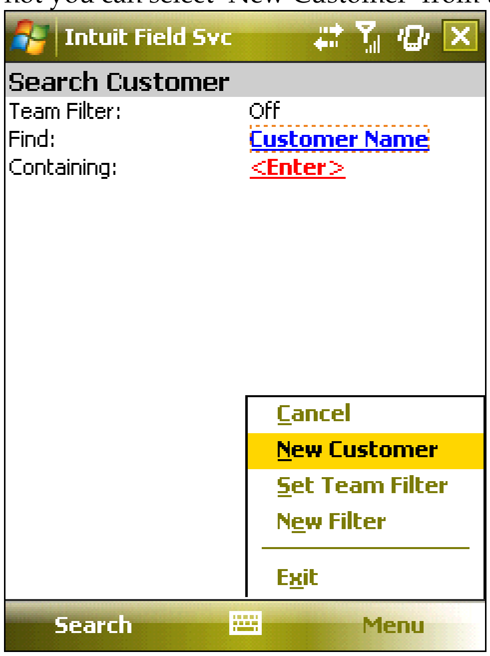


Figure 21: New Customer Menu from Customer search screen

2. Selecting New Customer menu will navigate you to the Create New Customer screen as shown below. You can fill in the fields and click on New Customer button.

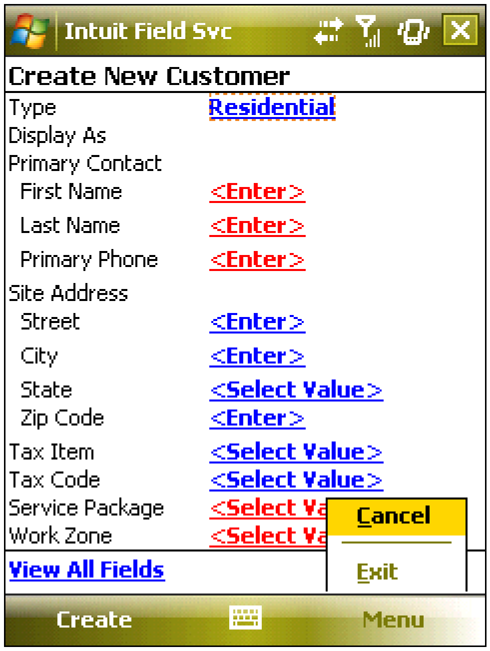


Figure 22: Create New Customer screen

3. Clicking on Create will create the new customer and proceed with the work order creation flow as described in the section above.

Time Card

Overview

This Section applies to companies that use the Time Card module to track shift time.

The Time Card feature on your mobile device is designed to track your shift time. Depending upon how your company has configured its Time Card module settings, your shift time will either be tracked by Punch In / Punch Out hours, or hours spent on Work Orders.

Note: If your company tracks shift time based on the hours you spend working on Work Orders (known as the Work Order Feeds Time Card method), the only Time Card option available on your mobile device will be to view your Time Card hours. See Viewing Your Time Card Information below.

Punching In and Out for Your Shift

If your company has selected the Punch In / Punch Out method, your shift will start based on one of two scenarios, depending upon your company's configuration:

- You automatically start or end your shift when you log into or out of Field Service Management.

- You must manually start your shift after logging into Field Service Management

If you need to manually start each shift from your mobile device, then:

1. From your My Work Screen, select **Time Card** (left soft key) after logging into Field Service Management.

2. If you see the option **Start Shift**, then you must manually start your shift by selecting this option.

Note: Once the shift has been started, a clock icon will appear in the upper right corner of the screen next to the label On Shift.

To end a shift:

1. From your My Work Screen, select **Time Card** (left soft key).

2. Tap **End Shift.**

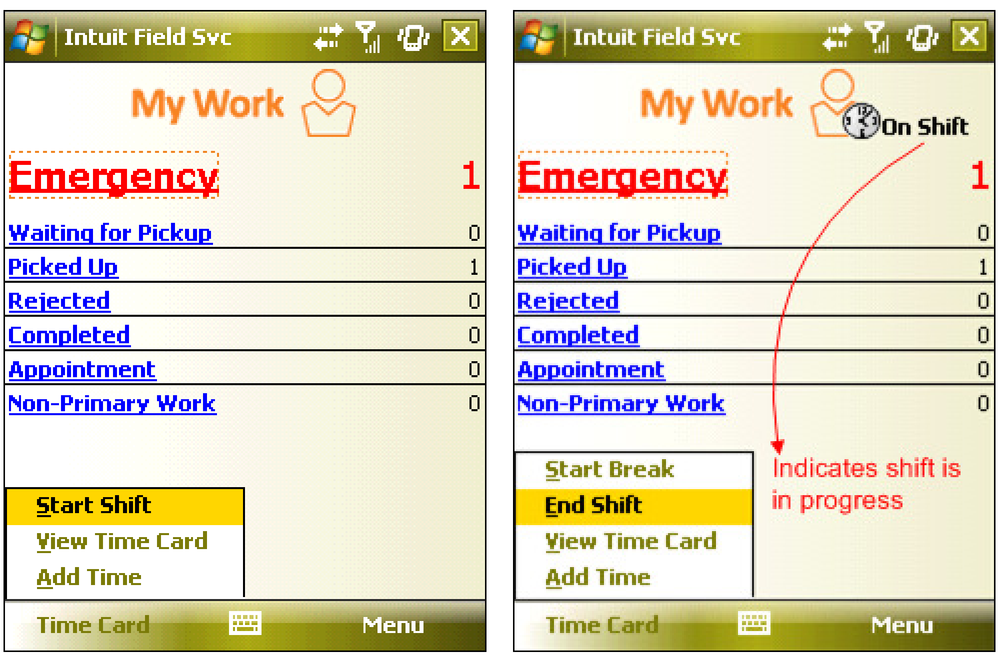


Figure 23: Select Time Card (left) then Start Shift to manually punch in. A clock icon (right) will display.

Starting / Ending a Break

Your company may also configure the Time Card module to track break time. If your company has chosen this configuration, then you must manually start and end each break from your mobile device. To start your break:

1. From your My Work Screen, select **Time Card** (left soft key) after starting your shift.

2. If you see the option **Start Break**, then you must manually start your Break by selecting this option.

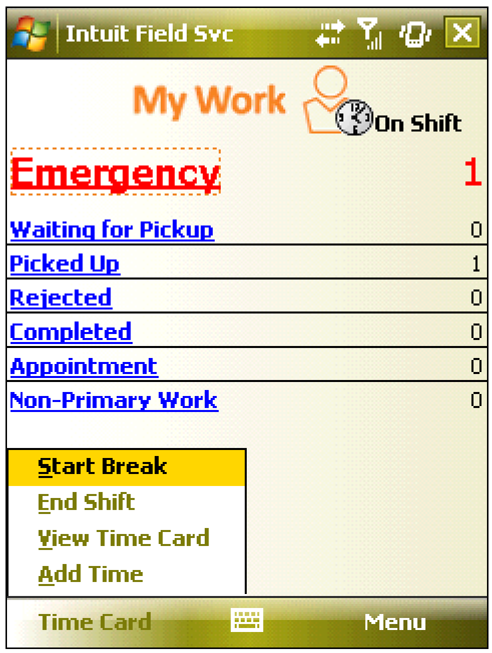


Figure 24: Starting a break from the mobile device

To end your break, select **End Break** or **End Shift** from the Time Card menu on your My Work screen.

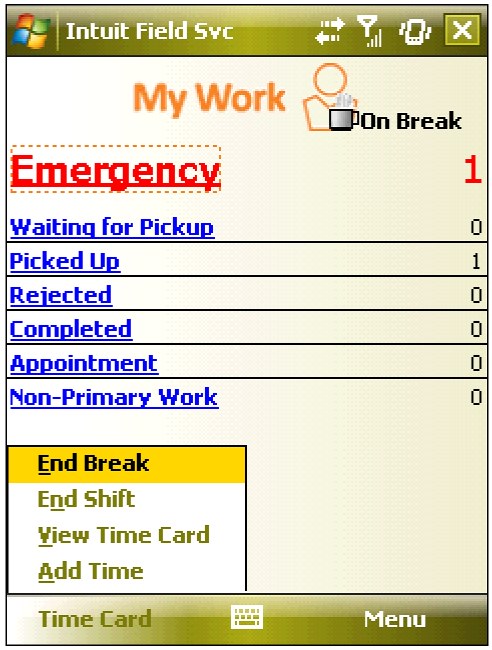


Figure 25: End break by selecting End Break or End Shift from the application menu

Viewing Your Time Card Information

You can view your time card information from a mobile device. To view:

3. From your My Work Screen, select **View Time Card** from the Time Card menu.

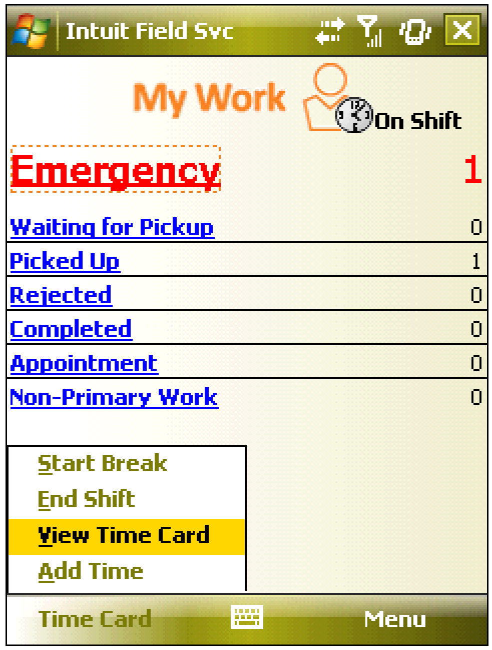


Figure 26: Selecting View Time Card from the application menu on the My Work screen

This will bring up the My Time Card screen. From this screen you can view the hours on your Time Card for the time period listed.

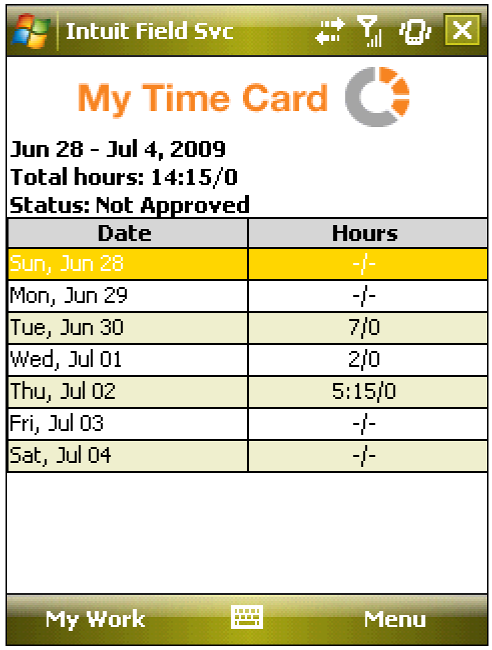


Figure 27: Viewing Time Card information from a mobile device

You can also view other Time Card periods. To do this, select **Previous** or **Next** from **Menu** (right soft key).

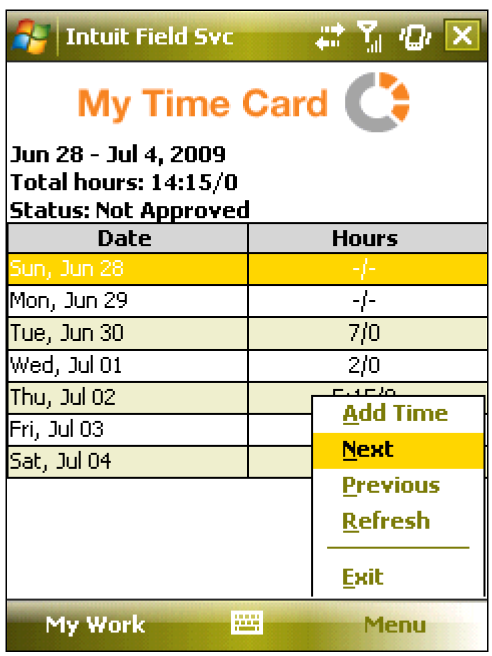


Figure 28: Select **Next** or **Previous** from Menu (right soft key) to scan through Time Cards

Adding Time to your Time Card

You can add time to your time card from a mobile device. You can add time from 2 places:

1. My work screen→Add Time

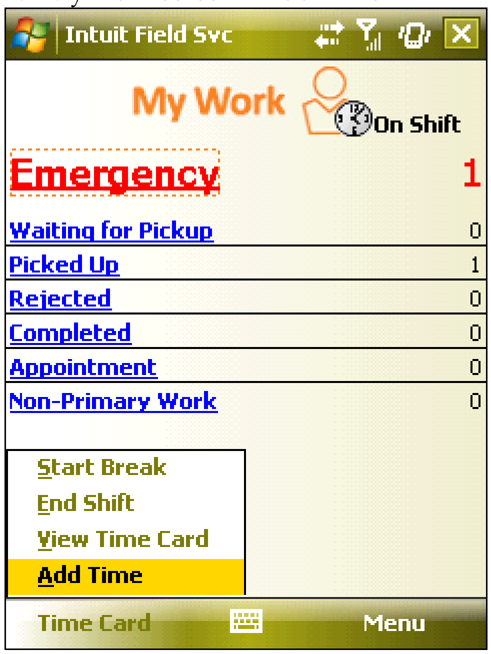


Figure 29: Add Time Menu from My Work Screen

2. My Time Card screen→Add Time

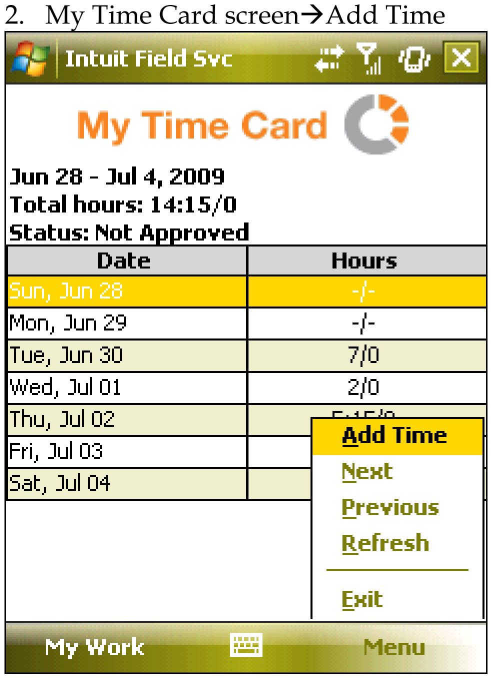


Figure 30: Add Time from My Time Card screen

On clicking 'Add Time' you will be navigated to a screen as shown below where you can enter a start and end time or duration.

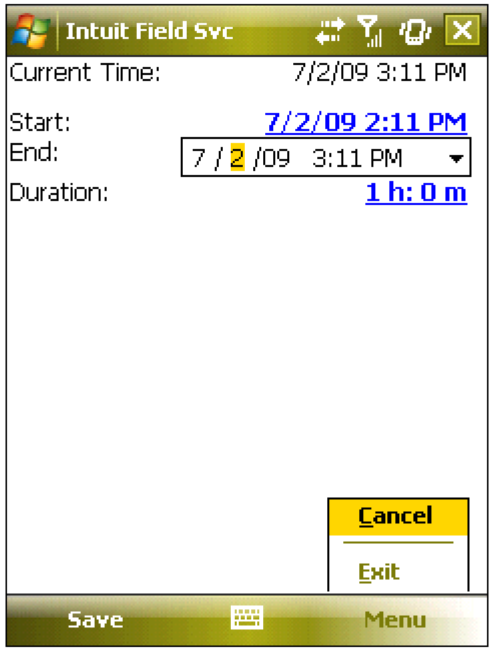


Figure 31: Add Time to Time Card

Smartphone Users – Addendum

Overview

Smartphones differs from other Windows Mobile devices supported by Field Service Management since they does not offer touch screen capability. Because of this, the following Field Service Management screens function or appear slightly different:

- Work Order Details
- Work Order List
- Settings – Display, Login, GPS, and Printer
- Pay Invoice

In addition, Smartphone devices are not capable of capturing signatures during credit card payment in the field.

Using Field Service Management with the Smartphone

In general, the up/down keys are used to scroll between fields and menu options and left/right keys are used to move or change options within a field.

Highlighting: To highlight a screen or menu item on your mobile device, move the cursor by using directional keys (such as the up arrow key ) until the item borders change color.

Example of highlighted field: 

Enter key: Smartphone users do *not* have the option to "tap" the screen while navigating programs. Pressing Enter allows you to manipulate fields. Press Enter on a:
- Combo Box (field with several options from which to choose) to activate, then press Enter again to produce a Select an Item screen.
- Check Box check or uncheck the box
- Menu item to select the item
- Editable field to activate the field
- Boolean field (for example, Yes/No) to toggle the value

Directional Keys: Use directional keys (such as the up arrow key ) to navigate the Field Service Management screens. For example, press:
- Right/Left keys to rotate selections in a Combo Box list.
- Right/Left keys to move between tabs in a Work Order in portrait orientation

- Up/Down keys to move between tabs in a Work Order
- Up/Down keys to move between items on a Select an Item screen
- Up/Down keys to save the current value and move to the next field

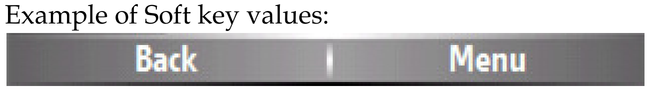
Back Key: Use the Back key to dismiss a pop-up menu or dialog box (such as an alert on the screen), or to backspace in a text entry field.

Example:

Note: If you press the Back key while on a standard Field Service Management screen, then Field Service Management will be minimized. To restore, press Home key > Start (left soft key) > Corrigo Program Icon.

Softkeys: Press the key below the value at the bottom of the screen—the soft key—to activate that button (for landscape users, this button may be on the side). For example, the left soft key will be the Save key when the program requires you to save data that you have entered.

Example of Soft key values:



Work Order Details

When you select a particular work order, the Details screen appears. The first tab on this screen is the Summary tab.

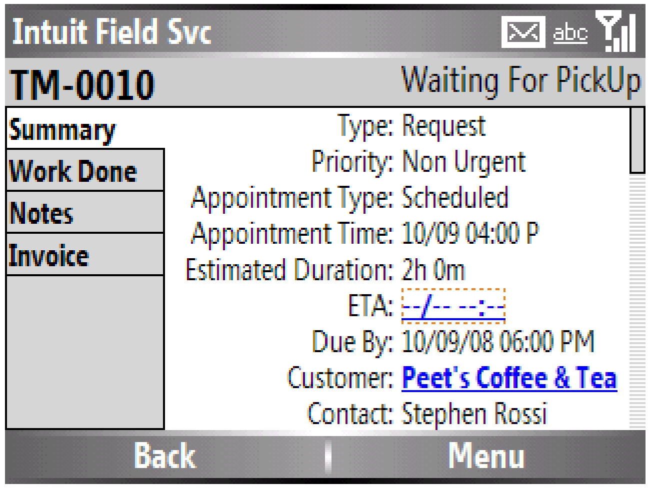


Figure 32: Work Order Details Summary tab

To move from the Summary tab to the Summary details, press the left/right keys. To move between tabs in the work order, or between specific line items, press the up/down keys. Press the enter key to select a specific detail for editing.

Navigation for the Work Done, Notes, and Invoice tabs are similar.

The Line Items tab allows you to check off problems as they are completed. Use up/down keys to move between specific problems. Press enter to check line item box , or move to and press Enter to view problem detail.

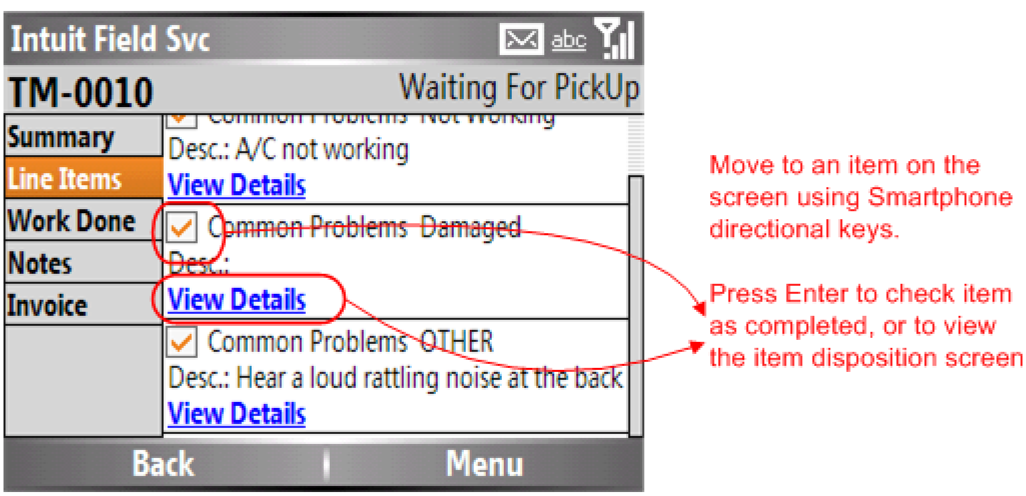


Figure 33: Line Items tab

Detail Field	Description	Helpful to Know

Detail Field	Description	Helpful to Know
Line Items Tab (appears if multiple problem items exists on work order)		
Check Box	Check this box to show that this particular item has been completed	To check the box, use directional keys to navigate to the box and highlight it, then press Enter.
more	Select the more link to view problem disposition details	This screen allows you to view the Description, Category and Task, as well as dispose of the item

Pay Invoice Screen

Receiving payment through Field Service Management on a Smartphone appears slightly different from a Windows Mobile device with a touch screen. Differences are described in this section.

On step 1 of the Pay Invoice screen, the window does not offer radio buttons next to payment options. Instead, scroll through payment options by pressing the up/down keys. Select Next (left soft key) after your payment has been selected.

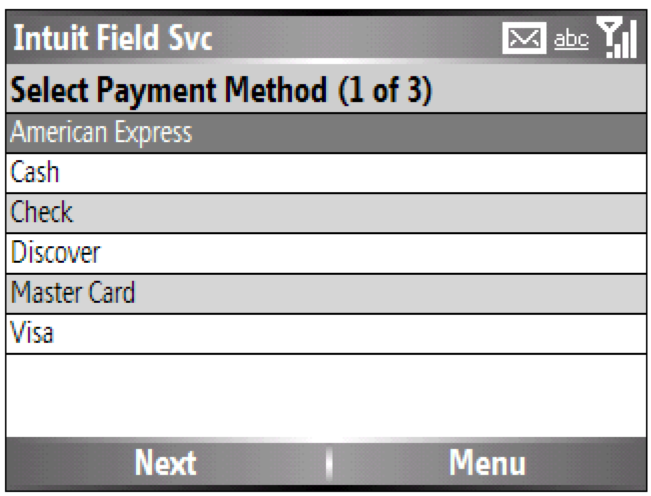


Figure 34: Select payment method by scrolling through options using the right/left keys

On step 3 of Pay Invoice, the Menu will not have an Exit option.

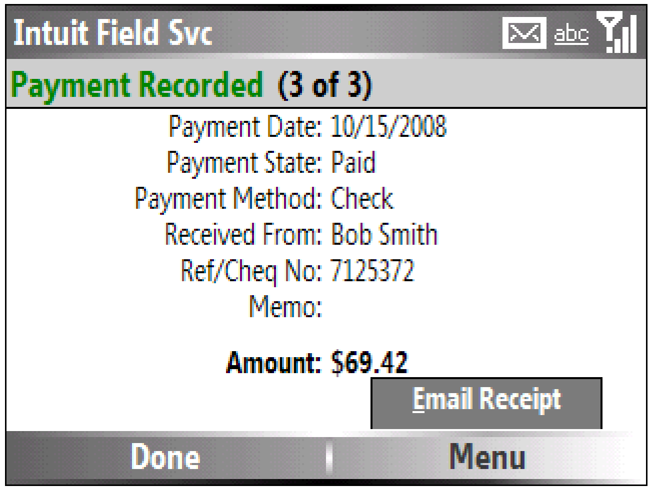


Figure 35: Step 3 of Pay Invoice offers no Exit option on the Menu

Configuring Your Smartphone

The Smartphone setting screen displays all settings options on one scrolling screen. Use directional keys to navigate between options. To reach the Settings screen from your My Work screen, select Menu>More>Settings.

Note: Not all configuration options will display on the screen. To scroll through options, continue to press the up/down keys.

Configuring a Bluetooth Printer

To configure Field Service Management to work with your Bluetooth printer:

1. Navigate to Bluetooth Printer on the Settings screen.
2. Press Enter to produce Configure Printer screen, then use up/down arrow to navigate between settings options.
3. Navigate to Printer Type field, then press Enter to activate.
4. Press Enter to produce Select an Item menu of available printer types.
5. Navigate to your printer type, then press Enter to select. Your printer type will be selected and you will be returned to the Configure Printer screen.
6. *If your printer has a card reader:* Navigate to Has Card Reader field and toggle value to Yes by pressing Enter.
7. Navigate to Com Port field, then press Enter to activate.
8. Press Enter to produce Select an Item menu of available com ports.

9. Navigate to the com port you selected when setting up your printer, then press Enter to select.

10. Press Save (left soft key) when done.

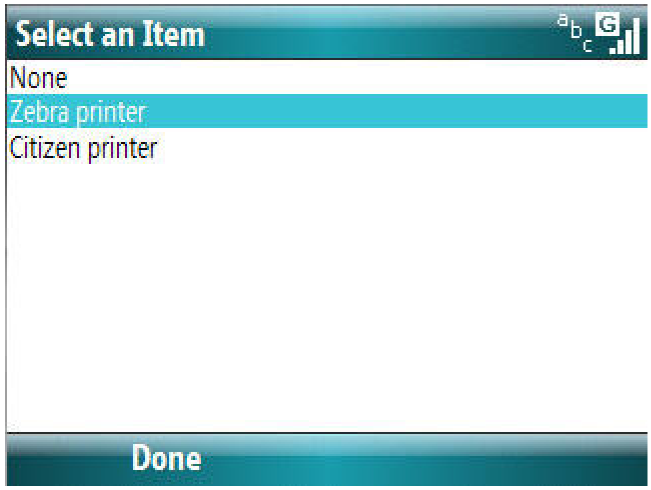


Figure 36: Select your printer from the Printer Type Select an Item menu

Configuring GPS

To turn on GPS for your Smartphone:

1. Navigate to GPS Tracking on the Settings screen.

2. Toggle GPS Tracking to Yes by pressing Enter.

If you have an external GPS device connected to your Smartphone, you must configure additional settings. To configure external GPS, select Configure GPS from the application menu.

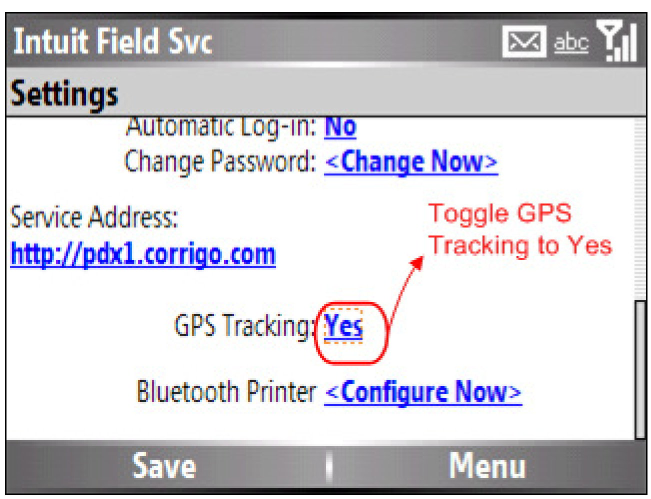


Figure 37: To configure external GPS, set GPS Tracking to Yes, the select Menu>Configure GPS

Note: The Configure GPS option does not appear on the menu for Smartphones that feature internal GPS.

The GPS Settings screen will appear

- Program Port does *not* need to be configured.
- Select the hardware port that corresponds to the serial port you set while configuring your Bluetooth device.
- Consult your external GPS documentation to determine the your hardware port baud rate to set.
- Check Manage Automatically

Note: Navigate and edit fields using keys as described in Using Field Service Management with a Smartphone section in this guide. See Configuring a Bluetooth printer as an example of how to navigate and edit settings).

Press Done (left soft key) when finished.

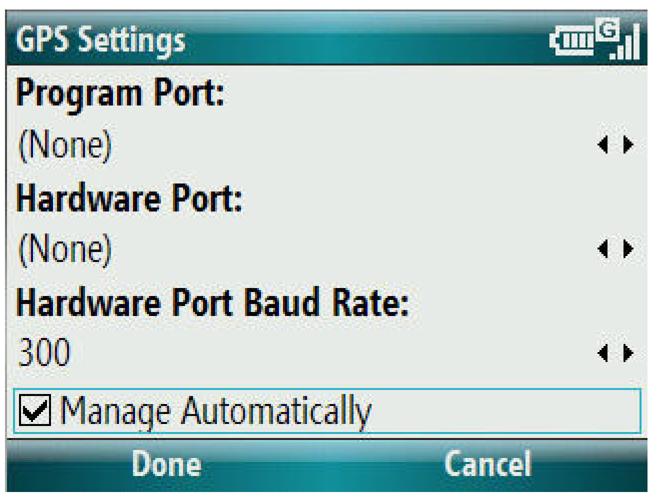


Figure 38: GPS Settings screen on Smartphone

Supervisor Information

Filtering Workload Lists

The Team Filter is an item on the Menu of the Team Work screens on the Smartphone. To filter the Team Work list for a particular service team or dispatch center:

1 Select the Menu (right soft key) on the Team Work screen.

2 Highlight Set Team Filter from the Menu by scrolling using the up/down keys (right/left keys for landscape view).

3 Press Enter.

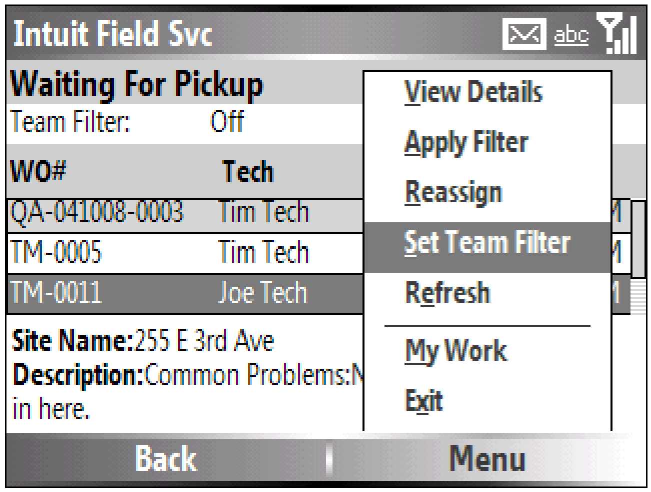


Figure 39: Select Set Team Filter from Menu to filter Team Work by Service Team or Dispatch Center

Troubleshooting

Check this list if you are having trouble with your mobile device or the application.

Mobile Device Does Not Work

If the mobile device does not seem to be working or you are unable to access Field Service Management, try these solutions:

- Check to see if the device is turned on. If it is not, press and hold the Power key for more than one second.
- Check that the battery is properly installed.
- Check to see if the battery is low. If it is, recharge or replace the battery.
- Try placing a call to check that you are in a valid service coverage area. Alternatively, check to see if you can access other applications on your mobile device. If you can access other applications but not Field Service Management call Technical Support. The signal strength icon appears at the top of the display. More bars next to the antenna indicate a stronger signal.

Important:
If you travel outside of your service area or service is otherwise interrupted, you will be unable to download or upload information until service is reestablished. Therefore, it is important that you download the jobs you need while you have service coverage. Read Working Offline in this guide.

Field Service Management Application Disappeared from the Smartphone Screen

If you press the Smartphone Back key while on a standard Field Service Management screen, then Field Service Management will be minimized. To restore, press Home key > Start (left soft key) > Corrigo Program Icon.

User ID or Password is Rejected

Contact your system administrator

Technical Support:

Phone

Field Service Management: 1.800.517.2871 (toll-free)

Email

support@corrigo.com