WennSoft

MobileTech

User Guide

Version: MobileTech 2021 (8.6)

Exported: 07/02/2024

Legal Declarations

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Log into MobileTech

The first time you log in, sync (page6) your device to receive information from the Microsoft Dynamics GP (host or back office) system and start working with MobileTech.

> The 3D Touch menu is not compatible with MobileTech. This is the long press on the Mobile CRM icon on your device's home screen.

Refresh Your Mobile Device Data

We recommend that you synchronize, or sync, your mobile device regularly to update the host system and your mobile device with any changes.

You might want to delete data periodically, which lets you manage your device memory and optimize performance by removing old files.

> Don't delete data if you've made changes on your mobile client device and you haven't synced, because you'll lose those changes.

To delete data:

1. Choose **Setup**.
2. Select Resco.
3. Scroll down to the ADVANCED section.
4. Next to the **Delete Data** field, choose the **Click Here** link.
5. You'll be asked to confirm the deletion.

Common Icons

This table helps familiarize you with some of the icons that are used in MobileTech.

Icon	Name/Description
	**Menu** Displays a list of available actions for a transaction or timesheet entry, such as **Save**, **Delete**, and **Cancel**. The actions that are available depend on the kind of transaction or timesheet entry that you're working with.
	**Add Snippets** Add predefined resolution note snippets when you complete an appointment. Select as many snippets as you want, in the order that you want them listed.
	**Back** Close the current pane and return to the previous pane.

Icon	Name/Description
	Barcode Scan a barcode for equipment or inventory items.
	Complete Complete an appointment.
	Map Display appointment addresses on a map.
	New Create a new record, such as a service call, appointment, or note.
	Number of Rejected Time Entries If you have any rejected time entries, a notification count displays next to the Time Entry icon on the navigation pane. The number displayed indicates the number of rejected transactions for the Previous and Current Weeks combined. When you correct and resubmit the time entry, the count updates.
	Rejected Time Entry This icon displays in the Time Entry list next to any time entries that have been rejected. A status row for the time entry also displays "Rejected" and the manager's comments display.
	Save Save the changes to the record.
	Sync Sync your device to the host system. On the **PO Receipts** tab, the **Sync** icon opens the vendor lookup, so you can select the vendor to use for retrieving drop-ship purchase orders.

Home Screen Icons

Icon	Name/Description
	Map View your appointments on a map.

Icon	Name/Description
	**Calendar** Choose to view your appointments in one of four views: Agenda, Day, Week, or Month. On devices, service appointments and technician activities can be dragged-and-dropped to a new date and/or time. (Dragging and dropping is not supported for job appointments.)
	**Customer** Choose to view a list of customers on your device. You can select a customer and then view the customer information, location, and any customer notes. See Customers and Locations (page13) for more information.
	**Appointment** Displays a list of appointments that you can choose to display more information, complete the appointment, and/or time in. You can filter the list to display only service appointments or only job appointments. You can search the list and you can also sort the list by date. See Appointments (page32) for more information.
	**Service Call** Displays a list of service calls that you can choose to display more information or you can create a new service appointment for the service call. You can search and filter the list. You can also sort the list by date, location, or call type. See Service Calls (page15) for more information.
	**New Service Call** Choose this to open the New Service Call window. See Create or Edit a Service Call (page16) for more information.
	**Time Entries** Displays a list of your time entries. The default view is the Current Week. You can also choose to display the Previous Week entries. You can search the list and you can also sort the list by date. From the Time Entries window, you can also add unbilled time entries and run the Employee Timesheet report. See Time Entry (page80) for more information.
	**Additional Work** Choose to display a list of additional billable work or you can create additional billable work for a service call. See Enter Additional Work for a Service Call (page18) for more information.
	**Setup** Choose to select/enter device setup options for your device. After you choose this icon, you then can choose either Resco setup options or MobileTech setup options. See MobileTech Setup for Mobile Devices (page8) for more information.
	**Help** Choose to view the online MobileTech Help.

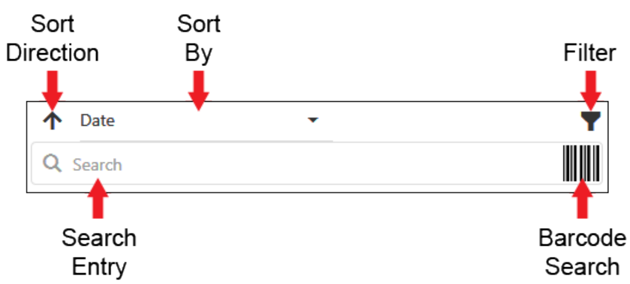
Icon	Name/Description
	**About** Choose to display version information for MobileTech and Woodford. You can also clear your log files and email log files from the About window. See Clearing the Error Log Files (page8) and Emailing the Log Files (page8) for more information.

Searches, Filters, and Sorting Options

Several MobileTech pages include options for filtering, searching for, and sorting information so you can more easily control the information you're viewing.

These options are available at the top of the list pages.

- Sorting (page4)
- Search (page5)
- Filter (page5)
- Barcode Search (page6)



For more information, see these sections:

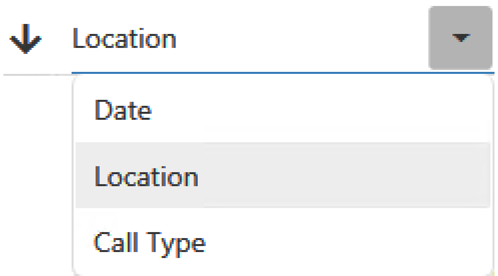
- Sorting (page4)
- Search (page5)
- Filter (page5)
- Barcode Search (page6)

Sorting

The last area indicates the current sorting options for the records. For example, this indicates the list is being sorted by **Location**, in ascending order (A-Z).

And this example indicates the list is being sorted by Location, in descending order (Z-A).

To change the sorting options, click the current Sort By option and choose the new sorting field.



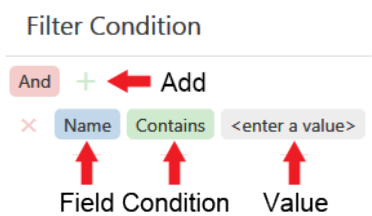
Search

You can use the **Search** field to narrow the scope of the information you're viewing by typing part or all of a record's name. For example, in the Customers pane, you can type *bank* to display all customer names that include "Bank."

To return to the full list, clear the text you typed or choose the close (**X**) icon.

Filter

The **Filter** icon opens a Filter Condition window where you can built a filter condition to filter the list of information.



1. Choose the **Filter** icon.
2. Choose **Add Condition**.
3. Choose **Name** and then choose the field to filter on.
4. Choose the **Condition** to display a list of available conditions for the field you selected.

   > When you use filters, we recommend that you use the Contains condition rather than =. For example, phone numbers are stored in the system with four additional digits at the end for the extension; if no extension is entered, these four digits are zeros. Using the = condition will work only if you enter the number with those four digits (such as 80055555550000).

5. Enter the **Value**.
   For example, in the **Service Calls** pane, if you want to view all calls that have a certain status, you can choose to filter by the Call Status field, choose = as the condition, and then enter the specific status you're looking for.
6. You can add more than one filter condition to your filter, as well as change the filter logic operator. This defaults to **And** at the top of the window, but you have the option to select **Or**, **Not, And**, or **Not Or**.
7. Choose **Apply Filter** to return to the previous list that is filtered based on your filter conditions.
8. To clear the filter, choose the **Filter** icon and then choose **Clear Filter**.

Barcode Search

You can scan a barcode to find the entity related to the barcode. For example, you can scan a sublocation or equipment barcode at a customer site from the service call, appointment, equipment, or task lists on your mobile device. See Scan Barcodes (page69) for more information.

Synchronization

Synchronizing, or syncing, with the host system lets you update the information on your mobile device with any changes that might have been made in Microsoft Dynamics GP. Syncing also updates the host system with changes that you make on your mobile device, such as changes to the status of calls and appointments, or new notes and attachments.

Syncing can be set up based on events and you can manually sync your mobile device at any time. If you cannot click on a setup field on your device, you must contact your administrator to unlock the field.

IMPORTANT: While Resco offers an automatic sync option, we advise against using it as it has caused issues with MobileTech functionality.

Event-based Syncing

If MobileTech is set up to use event-based syncing, event-based syncing is used to synchronize your device to the host system in these situations:

- You choose **Save** after creating a service call.
- You choose **Save** after creating an appointment.
- You choose **Complete Appointment** after completing a service call appointment.
- You request a timesheet report.

Display the Sync Page to Prompt You to Synchronize

After you create a service call, create or complete an appointment, or request a timesheet report, the Sync page is displayed. You must choose **Sync** to sync to the host system.

Field	Setting
UseEventBasedSync in the Admin Setup Options	**True**
Sync Login on the device	**On**

Automatically Synchronize Your Device to the Host System

After you create a service call, create or complete an appointment, or request a timesheet report, your device is automatically synced to the host system.

Field	Setting
UseEventBasedSync in the Admin Setup Options	**True**
Sync Login on the device	**Off**

If MobileTech is *not* set up to use event-based syncing, no event-based syncing occurs. The device will sync depending on your settings in the **Sync Login** or **Auto Sync** fields on the Setup page, or when you manually sync the device. See "Automatic syncing" and "Manual syncing" in this topic for more information.

Manual Syncing

To manually sync with the host system from the Sync page, the **Sync Login** option must be marked on the **Options** tab on the **Setup > Resco** screen.

To log on or to sync the host and your mobile device, follow these steps.

1. Choose the **Sync** icon.
2. Enter the following information. If you've previously used MobileTech on this client device, most or all of this information is shown as default entries.

Field	Description
Url	Enter the URL of the MobileTech Integration Sync Server. The URL must include the server name, website port number, and company database name. Example: http://servername:8888/companydatabase
User Name	Enter your user name. This is the email address that was set up for you by an administrator in MobileTech Administration to use when you log on to a client device.
Password	Enter the password that is associated with your user name.
Save Password	Toggle on if you want the application to remember your password after you exit and start MobileTech again. Don't save your password if you're using a shared client device. If you don't save your password, it is saved only during this session. You won't have to re-enter your password the next time you sync during this session.
Scan QR	This feature is not in use with MobileTech.

3. Choose the **Sync** icon. If you encounter any issues while you're syncing, you can review and resolve by choosing **Sync Errors**. For more information, see Resolving Sync Issues (page8).

Resolving Sync Issues

If you encounter issues when you sync a mobile device with the host system, you can review the issues by choosing **Sync Errors**. The **Sync Errors** option is displayed only if you have sync issues to resolve on your mobile device.

1. Choose **Sync Errors** to view a list of errors. Information about the errors includes the type of error and a brief description of the issue. It also indicates what happens with the record after it is successfully synced:
   - **Create** indicates that a new record will be created after the sync.
   - **Update** indicates that an existing record will be updated after the sync.
2. If an error is the result of missing or incorrect data on the mobile device, you can resolve the issue, based on the information that is provided for the sync errors.
3. After the issues have been resolved, sync your device again.

Emailing the Log Files

If you are having sync issues, you may be asked to send the error log to your administrator or to others for assistance. The log includes information, such as the MobileTech version number, device information, and the message or messages that you encountered.

1. In MobileTech, choose **About**.
2. On the About page, choose **Email Log Files**.

Clearing the Error Log Files

The error log on the device is not cleared automatically. Errors continue to be added to the log as they occur. This can make it difficult for administrators to find the information that pertains to the most recent errors.

After you've emailed the error log to the administrator, you can clear the log so that the previous information is no longer retained.

1. Choose **About**.
2. On the About page, choose **Clear Log Files** to clear the error log.

MobileTech Setup for Mobile Devices

Working with MobileTech Setup Options

To access the MobileTech Setup Options, choose **Setup** and then choose **MobileTech**.

Viewing Options

The Options section displays your Technician ID, Employee ID, Employee Name, and the MobileTech Woodford version. All device settings are set up by your administrator in the Woodford project.

Job Safety Analysis

If your company uses the Job Safety Analysis report from Resco, you will need to set **Use Legacy JSA** to *False*.

Setting up Time Entry Default Pay Codes

To save time when you create unbilled and billable time, expense, and travel entries, you can set up default pay codes. You can select a different pay code, if necessary, when you complete an entry on your mobile device. Pay codes are set and assigned to individual technicians in Service Management.

If you don't set up pay codes, the pay codes from the labor, travel, and expense settings in the MobileTech setup are used. If no pay codes are set up there, default pay codes aren't displayed.

1. Choose **Setup**.
2. Choose **MobileTech**.
3. On the Setup page, choose **Time Entry**.
4. Select the Default Unbilled pay codes to use for unbilled hourly, expense, and travel entries when you create timesheet entries.
5. Select the Default Billiable pay codes to use for billable hourly, expense, and travel entries when you create time entries for appointments.
6. Choose the **Save** icon.

Working with Resco Setup Options

The following setup options are from Resco. Some of the setup options below are not supported by MobileTech and changing these options may affect how the MobileTech works on your device.

1. Choose **Setup**.
2. Choose **Resco**.
3. Update the settings below:

CRM	Displays your technician email address.

Online Mode	Displays the Online Mode as set up by your adminstrator.
Auto Sync	Displays the Auto Sync setting as set up by your administrator.
Sync Login	Choose **On** to require that you log on to MobileTech before you sync your mobile device. Choose **Off** if you want to be able to sync your mobile device without logging on to MobileTech.
Save Password	Choose **On** to save your logon password for the device that you're using. If this option is on, you don't have to enter your password each time you log on to MobileTech. If you choose **Off**, you must enter a password on the device when you start MobileTech.
Use Fingerprint (Android/iOS only)	Turn on to use your fingerprint, Touch ID, and/or Face ID to log into MobileTech. We recommend to leave this turned **Off** if you share a device.

Language	Not supported by MobileTech. By default it is set to **Automatic** to use the language of your device.
New Form UI	Not supported by MobileTech.
Max Image Size	iOS Only - Choose the maximum image size. Default / 640 x 480 / 1024 x 768 / 1600 x 1200 / 2048 x 1536 / 2592 x 1936
List Buttons	Not supported by MobileTech.
Map	Choose **On** to make the **Map** button available. Locations on maps are displayed only if coordinates for locations are entered in Service Management. Contact your system administrator about making changes to the Service Management SV00200 table.
Dashboard	Not supported by MobileTech.
Change List	Not supported by MobileTech.

Design Dashboards	Not supported by MobileTech.
Private Charts	Not supported by MobileTech.
AutoFormGrid	Not supported by MobileTech.
Full Screen (Windows only)	This Windows-only option displays the full screen setting as set up by your adminstrator. • **On** If you are using a Windows device, this option displays MobileTech in full-screen view. The title bar, including the icons for minimizing, maximizing, and closing the app, won't be displayed. • **Off** The title bar and the icons for minimizing, maximizing, and closing the app display.
Ask Before Exit (Windows only)	If you're using a Windows device, choose **On** if you want to be prompted for a confirmation before closing MobileTech.
Call Via	Not supported by MobileTech.
Send Invites	Not supported by MobileTech.
Use Reminders	Not supported by MobileTech.
Send Email Via	Not supported by MobileTech.
HTML Emails	Not supported by MobileTech.
Signature	Not supported by MobileTech.
Exchange Folder	Not supported by MobileTech.
Show Images	Not supported by MobileTech.
Mark Email Read	Not supported by MobileTech.

Home Realm	Not supported by MobileTech.
ADSF Username	Not supported by MobileTech.
UseSystemOAuth	Not supported by MobileTech.
Web Service	Must be **XRM**. Other selections are not supported by MobileTech.
Delete Data	Use this option to clear the local database. After you've entered information by using your mobile device and synced data, you can delete data, which lets you manage your device memory and optimize performance by removing old files.
Max Attachment Size (Windows and iOS only)	If you're using a Windows or iOS device, select the file size of attachments, such as photos. If you're viewing an image that exceeds this size, it's resized to the maximum image size for viewing purposes, and then returned to its original size. If you take a photo with your device, this is the maximum size of the photo.
Display Density (Android only)	If you're using an Android device, use this field to change the size of the content on the screen. You can use this setting to display more or less content, depending on the size of the screen and your preference.
Max Attachment Size	The maximum size of any file that can be attached to records. This setting can't be changed on the device. This is a Woodford setting.
Max Sync Records	The maximum number of records that can be synced to the mobile device for one entity. The default maximum is 100,000 records at one time, but you can decrease that number.
Diag. Sync Log	Use this option to log details for synchronizations.
Entity	Not supported by MobileTech.
AppFolder	Not supported by MobileTech.
Client Certificate	Not supported by MobileTech.
Pinned Certificate	Not supported by MobileTech.

4. Choose the **Save** icon.

Customers and Locations

Working with customers

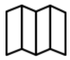
Choose **Customers** and select a customer. In the Customer pane, use these additional tabs to view information:

Icon	Description
	Location (page13)View Location information for the customer.
	Notes View any additional notes that are associated with the customer. Depending on the MobileTech setup, you might not be able to edit an existing note. For more information, see Create a Note (page52).
	Reports (page29) View any Inspection reports or Job Safety Analysis reports available for this entity. This icon displays based on your company's settings.

Working with locations

From the **Location** tab in the Customer pane, select a location. In the Location pane, use these additional tabs to view information:

Icon	Description
	Equipment (page64)
	Contacts To contact someone at the customer location, use this tab to view contacts who are associated with the location. If email or telephone information is set up for the contact, you can choose the appropriate icon to launch your email app or call the contact. To add or edit contacts, see Creating or editing location contacts (page51).
	Notes View any additional notes that are associated with the customer. Depending on the MobileTech setup, you might not be able to edit an existing note. For more information, see Create a Note (page52).

Icon	Description
	**Map** If your device supports mapping and a valid latitude/longitude or location address is entered in Service Management, use this tab to see the mapped location of an appointment. View the location on a map. If the map does not show the correct location, you can update the GPS location using your device's GPS. For information, see Updating GPS Coordinates (page14).
	Reports (page29) View any Inspection reports or Job Safety Analysis reports available for this entity. This icon displays based on your company's settings.

Request Service History for a Location

You can request service history to view the most recent service calls for a location.

1. Choose **Service Calls**. Select a service call and choose **More**.
2. In the Service Call pane, choose the **History** tab, and then choose **Request History** in the History window. A list of closed and completed service calls is displayed for the location of the current service call. The number of records that are displayed is determined by the MobileTech setup.
3. You can select a service call to view the date, call and problem type, technician, resolution, and any notes that are associated with the service call.

Updating GPS Coordinates

You can add or update location coordinates using your device's global positioning system. GPS coordinates can be updated for appointments (page32), equipment (page64), and locations (page13). We recommend using cell service when updating GPS locations.

1. In the Appointment, Equipment, or Location pane, choose the menu icon.
2. Choose **Update GPS**.
3. When you sync your device, the coordinates will update the record in Service Management.

Additional information

The Mapping feature in MobileTech looks for the customer's location coordinates in the following order:

1. Location Maintenance in Service Management using Latitude and Longitude coordinates.
2. OpenStreetMap.org[1] using the location's address fields.
3. Device's GPS – This is a manual method using the Update GPS feature.

> The technician needs to be physically standing at the location and then choose to Update GPS as that is specific location to be saved.

1 http://OpenStreetMap.org

Service Calls

To work with service calls, choose **Service Calls**. To work with an existing service call, select a service call and choose **More**.

Use these tabs to view additional information:

Icon	Description
	Service Call View and change service call details.
	Appointments (page32) Displays a list of appointments associated with the service call.
	Contacts To contact someone at the customer location, use this tab to view contacts who are associated with the location. If email or telephone information is set up for the contact, you can choose the appropriate icon to launch your email app or call the contact. To add or edit contacts, see Create or Edit Location Contacts (page50).
	Equipment (page64) View the equipment that is associated with the service call.
	History View service history at this location. Choose **Request History** to display a list of completed service calls. The Service History displays the list of service calls, with the service call ID, call description (if available), and date, displayed on the call title bar. Select the call to view additional details.
	Tasks (page20)Depending on the (page20)MobileTech setup, you may be required to enter a task response before the appointment can be completed. (page20)
	Task Materials (page22) Depending on the MobileTech setup, you can view the task materials, or replacement parts, that are associated with a task for a service call.
	Attachments (page24)You can add attachments, such as documents and images, to service calls, equipment, and tasks in Service Management. The attachments will be available to view and change from the attachments list for a service call or task in MobileTech.

Icon	Description
	Notes View any additional notes associated with the service call. Depending on the MobileTech setup, you might not be able to change an existing note. You can also create a new service call note. For more information, see Create a Note (page52).
	Reports View any Inspection reports or Job Safety Analysis reports available for this entity. This icon displays based your company's settings.

To create an appointment for a service call, select the service call and choose **New Appt**. For more information, see Create or Change an Appointment (page33).

To create a new service call, choose the **New** icon. For more information, see Create or Edit a Service Call (page16).

Create or Edit a Service Call

You can create a service call for any customer that you have access to. When you create a service call from your mobile device, the service call is assigned to you. You also can change some of the information on a service call after it has been created.

- Create a service call (page16)
- Editing a service call (page18)

Create a service call

You can create a service call by first entering the customer and location information, or you can go to the **Equipment** field and select a piece of equipment that is already assigned to the customer. Customer and location information is displayed. Enter additional information about the service call, as needed.

A service call that you create from your mobile client device is pending until it is accepted by the host system and the service call ID is generated.

You can search from either your DEVICE or from the SERVER. The MODE is indicated at the top of the window.

- **DEVICE MODE** - The Customer Location drop-down displays only customers/locations on your device.
- **SERVER MODE** - The Customer Location drop-down displays customers/locations on the middle-tier database (an internet connection is required).
    - Only the customers within your branch display if Global Filtering is enabled in Signature.
    - A **Customer Location/Equipment** search field is displays at the top of the form if the customer locations and equipment exceed the Fetch Limit settings. This is a case-sensitive field. The search field defaults to **Customer Location** however you can choose the drop-down to select **Equipment**.

Creating the service call

1. Choose **New Service Call** (or choose **Service Calls**, and then choose the **New** icon).
2. Enter information in these fields. You can enter information in the order that the fields are shown in the pane. Or, you can select a piece of equipment in the **Equipment** field, and the customer and location information that is associated with that piece of equipment is displayed.

Field	Description
Customer Location *	Begin entering the Customer Location name (customer, location, or address line 1). As you enter the customer or location, the drop-down updates with the data to choose. The customers that you can select depend on the MobileTech setup.
Date Opened	Displays the system date and time. You can't change this information.
Call Type *	Choose a call type that describes the nature of the work to be done, such as *EMG* for emergency.
Problem Type	Choose a problem type that describes the problem that needs to be fixed, such as **Alarms going off** or **Brake repairs**.
Equipment	Choose the equipment that is associated with this service call. In SERVER MODE, the equipment lookup may be blank until the customer location is selected. You can choose equipment for the customer location, or you can choose the equipment first, and the customer and location information is displayed. Enter information about the equipment – such as the equipment ID, serial number, or model number – to easily locate a piece of equipment. If your company uses barcodes, choose the **Barcode** icon to populate the service call fields. For more information on barcodes, see Scan Barcodes (page69). The Barcode icon is visible based on your company's settings.
Customer PO #	If applicable, enter the purchase order number that is associated with this service call. This field is required only if a purchase order number is required to create a service call in the host system. If necessary, you can change or remove the purchase order number in this field.
Description	Enter a short description. This description is used together with the service call ID to help identify the service call.

Field	Description
Internal Note	Mark the checkbox if description note should be internal only and won't displayed on customer reports. If the checkbox is *unmarked*, the note will be display on customer reports.

*Required field

3. Choose the **Save** icon. Because the service call doesn't have an ID until after you sync, it appears on the list of service calls as a pending service call.
4. When you're ready to send the pending service call to the host system and you complete the service call creation process, choose the **Sync** icon.

   The sync date range that is created by the **Start Sync** and **End Sync** dates must include the date of the call in order to successfully sync and create the service call.

5. After the service call is created, the **Equipment** tab might be blank. At the top of the tab, choose the **View Unassigned** filter to update the list of equipment records from the location.

Editing a service call

You can change these service call details:

- Call type
- Problem type
- Purchase Order
- Description
- USER-DEFINED 1-4
- Caller Name*
- Caller Phone*
- Caller Email*

You can't change an MC (maintenance) call type to a non-MC call type, or vice versa.

*The caller information defaults from the service call entered in Service Management. These fields need to be manually added to the Service Call window using Modifier.

Enter Additional Work for a Service Call

When you're on a service call, you can record any information that might require additional billable work in the future. Whether you can enter additional work depends on the MobileTech setup. You can also attach photos and or files.

1. Choose **Additional Work**, and then choose the **New** icon.

   You can search service calls from either your DEVICE or from the SERVER. The MODE is indicated at the top of the window.
   - **DEVICE MODE** - The Service Call drop-down displays only service calls on your device.
   - **SERVER MODE** - The Service Call drop-down displays all service calls assigned to you on the middle-tier database (an internet connection is required).

2. Enter information in these fields, as necessary.

Field	Description
Service Call *	Choose the service call and appointment that you're working on.
Transaction Date	The system date is displayed. You can select a different transaction date.
Description	Enter a description of the additional work.
Contact Name	Use the lookup or enter the name of the customer to contact about the additional work opportunity. You can also add a new contact, although this is only temporarily added to the additional work.
Contact Phone	Enter the phone number of the customer to contact about the additional work opportunity. If you select a contact, the phone number will fill this field. ⚠ The caller name and phone information are not tied to Contacts in Signature.
Est. Labor Hrs.	Enter the estimated labor cost that is anticipated for the additional work.
Est. Material	Enter the estimated material cost that is anticipated for the additional work.
Est. Equipment	Enter the estimated equipment cost that is anticipated for the additional work.
Est. Subcontractor	Enter the estimated subcontractor cost that is anticipated for the additional work.
Est. Other	Enter the estimated other costs that are anticipated for the additional work.

*Required field

3. To add an attachment to the additional work, you need to save the transaction and then choose the work item.
4. Choose **Attachments** and then choose the **New** icon.
5. Choose the **File** icon and then choose **Choose Picture** or **Select a file** (the options displayed depend on the device you are using).
6. Choose the menu icon to perform other actions for the image/file:

   ⚠ The options listed depend on the device you are using. For example, an iPhone may have "Capture Picture", "Record Video", "Use Last Photo Taken", etc.

   - Clear
   - Open
   - Copy
   - Print
   - Resize Image
   - Email
   - Edit Image

    - Export
    - Cancel
7. Choose the **Save** icon.

Complete Tasks for a Service Call

You can view, change, and complete information for a single task or for a group of tasks that is associated with a service call. To easily go to other tasks from the **Tasks** tab, choose **Previous** or **Next**.

> Depending on the MobileTech setup, you may be required to enter a task response before the appointment can be completed. Additionally, if task materials (replacement parts) are associated with a task, a nut and bolt icon is displayed for the task. You can choose **Task Materials** to view those task materials. For information about viewing task materials or creating inventory transactions for them, see View Task Materials (page22) and Create Inventory Transactions for Task Materials (page23).
> Beginning with MobileTech 8.0, a service call can remain open with Task Completion set to required if a second appointment is created for the service call prior to attempting to complete the first appointment.

To complete tasks for a service call:

1. From the main navigation, choose **Service Calls >** select a service call and select **More** (or select an appointment **>** Select **More >** choose the **Service Call** hyperlink)**.**
2. In the Service Call window, choose the **Tasks** tab.
3. A list of the tasks that you're scheduled to complete for the service call is displayed. You can filter the tasks that display by choosing from the following:
    - **All Tasks (hierarchy)** – View all tasks for a service call by sublocation, then equipment, and then the task list. This is the default view.
    - **Open Tasks (hierarchy)** – View only open tasks for a service call by sublocation, then equipment, and then the task list.
    - **All Tasks (no hierarchy)** – View all tasks for a service call by task code. No equipment, sublocation, or task list information is displayed.
4. If you want to filter the task list more, you can select a Sublocation for the task list and/or Equipment.

    > If you selected a Sublocation, only the equipment available for the sublocation are listed in the drop-down. If you did not choose a specific sublocation, all the equipment assigned to the task list will display in the drop-down.

5. You can select the drop-down beneath the filters to choose to display tasks based on the Task Status by selection:
    - **Show All** - Displays all tasks, although if you have filtered to show Open Tasks at the top of the page, only the open tasks display.
    - **Open Tasks** - Displays only tasks with an Open status.

- **Complete Tasks** - Displays only tasks with a Closed status.

Working with Tasks

You can complete a group of tasks or an individual task.

- Working with a Group of Tasks (page21)
- Working with Individual Tasks (page21)
- Working with Subtasks (page22)

Working with a Group of Tasks

Completing a Group of Tasks

To complete a group of tasks:

1. Select the task list, sublocation, and/or equipment above the tasks and choose the **Complete** icon.
2. When a message appears to confirm the completion of all tasks under the selected entity, choose **Yes**.
3. The status of the tasks changes to **Complete**. When you complete a task, all subtasks for the task are also completed.

Reopening a Group of Tasks

To reopen a group of tasks:

1. Select the task list, sublocation, and/or equipment above the tasks and choose the **Reopen** icon.
2. When a message appears to confirm that all tasks will be reopened under the selected entity, choose **Yes**.
3. The status of the tasks changes to the default task status.

   > If you previously chose **More** to view or change information for a task and you selected the status for that task, the status of the task doesn't change if tasks are completed or reopened by using the sublocation, equipment, or task list.

4. When you finish all the tasks for a service call, choose the **Complete** icon. The word **COMPLETE** is displayed next to each task to indicate the task is completed.

Working with Individual Tasks

Entering Task Details

1. Select the task.
2. Select **More**.
3. Under **Task Details**, you can edit the **Task Status**, **Completion Date**, and depending on the task, enter a **Text Description**.

Completing an Individual Task

To complete an individual task:

1. Select the task list, sublocation, and/or equipment above the tasks. The information that is displayed for the task depends on the filters that you selected.

2. Select an individual task from the list of tasks, select **Complete** or choose **More** to update information for the task, such as the status or completion date.
3. Use the **Previous <** and **Next >** buttons to work with other tasks.
4. When you finish all the tasks for a service call, choose the **Complete** icon. The word **COMPLETE** is displayed next to each task to indicate the task is completed.

Reopening an Individual Task

Depending on the status of the task, you can reopen the task, complete it, or choose **More** to update information for the task, such as the status or completion date. The status of the task changes to the default task status if you reopen the task.

After you complete a task, you can close the pane, choose **Next** to go to the next task or choose **Previous** to return to an earlier task.

1. Select the task list, sublocation, and/or equipment above the tasks. The information that is displayed for the task depends on the filters that you selected.
2. Select an individual task from the list of tasks, select **Complete** or choose **More** to update information for the task, such as the status or completion date.
3. Use the **Previous <** and **Next >** buttons to work with other tasks.
4. When you finish all the tasks for a service call, choose the **Complete** icon. The word **COMPLETE** is displayed next to each task to indicate the task is completed.

Working with Subtasks

1. Select a task.
2. Choose **More**, and then choose **Subtasks**.
3. Beneath the Subtasks bar, you can filter the subtasks by selecting **Show All**, **Open Tasks**, or **Complete Tasks** from the drop-down.
4. To complete all the displayed subtasks, choose the **Complete** button. You can also reopen all the displayed Closed subtasks by choosing the **Reopen** button.
5. To complete an individual subtask, select a subtask, and depending on the status of the subtask, you can choose **Complete**, **Reopen**, or **More**. If you choose **More**, you can change the completion date, if needed. You can also change the status of the subtask.
6. When you finish changing the subtask information, close the pane or use the **Previous <** and **Next >** buttons to work with other tasks.
7. When you finish all the tasks for a service call, choose the **Complete** icon. The word **COMPLETE** is displayed next to each task to indicate the task is completed.

View Task Materials

Depending on the MobileTech setup, you can view the task materials, or replacement parts, that are associated with a task for a service call. This is helpful when you're onsite at a customer location so you know what parts you'll need to have on hand to complete a task.

> Depending on the MobileTech setup, you also might be able to view task materials while completing an appointment.

These task materials were associated with the service call task in the Service Call Task Code Materials window in Service Management.

You can view task materials only for tasks and task hierarchies, not subtasks. A nut and bolt icon is displayed next to each task that has task materials associated with it.

To open the Task Materials pane for service calls, choose **Service Calls**. Select a service call, choose **More**, and then choose the **Task Materials** tab.

To open the pane for appointments, choose **Appointments** (or choose the **Appointments** tab from a service call). Select an appointment and choose **Complete**, and then choose the **Task Materials** tab.

The Task Materials pane displays the equipment and its related sublocation that is assigned to the service call, the tasks that are associated with the equipment and service call, and the task materials that are associated with those tasks.

The task materials include the item number and description, whether the part is required or optional, and also the quantity. These can be either inventory or non-inventory items.

To create inventory transactions for task materials, see Create Inventory Transactions for Task Materials (page23).

Create Inventory Transactions for Task Materials

Depending on the MobileTech setup, when you view task materials, you can also create inventory transactions for the replacement parts that are used during a service call.

- If the task material is an inventory item but it isn't assigned to any of your inventory sites, the Inventory pane won't open and you'll receive a message. Contact your system administrator for assistance.
- MobileTech inventory transactions do not support Microsoft Dynamics GP Inventory Lots.

1. Open the Task Materials pane for a service call or appointment:
   - For service calls, choose **Service Calls**. Select a service call, choose **More**, and then choose the **Task Materials** tab.
   - For appointments, choose **Appointments** (or choose the **Appointments** tab from a service call). Select an appointment and choose **Complete**, and then choose the **Task Materials** tab.
2. In the Task Materials pane, select the task material item to create the transaction for, and then choose **Add** .
3. In the Inventory pane, enter information in these fields.

Field	Description
***Appointment**	Select the appointment that you're working on. If there's only one appointment for the service call, that appointment is displayed.
Transaction Date	Enter the transaction date. Today's date is the default value.
Cost Code	Enter the cost code. **MATERIAL** is the default value.
Non Inventory	Select **Yes** if the task material is a non-inventory item. Select **No** if it's an inventory item.

Field	Description
Site Inventory	If you selected **No** in the **Non Inventory** field, select the inventory site for the task material. If the task material is associated with only one site, and you're assigned to that site, the item number and inventory site are displayed.
Item Number	If you selected **Yes** in the **Non Inventory** field, enter the item number for the task material.
Quantity	Enter the quantity of the item. The default value is the quantity that was set up for the task material in the Service Call Task Code Materials window in Service Management.
Unit Cost	Enter the cost of the item. This field might not be displayed, depending on the MobileTech setup.
List Price	Enter the list price of the item, which was set up in the Item Maintenance window in Service Management. This field might not be displayed, depending on the MobileTech setup. You can't enter negative list prices for items that have an item type of **Sales Inventory**, **Discontinued**, or **Kit**.

*Required field

4. Choose the **Save** icon.

Work with Service Call, Equipment, and Task Attachments

You can add attachments, such as documents and images, to service calls, equipment, and tasks in Service Management. The attachments will be available to view and change from the attachments list for a service call or task in MobileTech.

You can add and view attachments on your mobile device, and also change, or "mark up," attachments on your mobile device.

If an attachment is associated with a:

- **Service call**: You can open it from the **Attachments** tab for the service call.
- **Equipment**: You can open it from the **Attachments** tab for the equipment either from the Service Call > Equipment tab or from the Customer > Location > Equipment tab.
- **Task**: You can open it from the **Attachments** tab for the task.

Files that are attached to service calls and tasks are displayed together with their descriptions and file extension types, such as PNG, PDF, DOC, or XLS. So if more than one document is associated to the service call, you can easily see the file types.

> You can attach any file type on Android and Windows devices, including .doc and .xls files.
> On all devices, you can copy other files types, such as Microsoft Word documents or PDFs, into MobileTech to be attached to a service call. For more information, see Copy and paste an attachment to a service call or task (page26) .

These procedures discuss attachments that are associated with existing service calls and tasks. To create a service call, see Create or Edit a Service Call (page16) , and then see the instructions below to add attachments to a service call. To create a task for a service call before you add an attachment to a task, see Complete Tasks for a Service Call (page20) .

For instructions about how to add attachments to service calls in Service Management, see the information about document management in the Service Management documentation.

Service call and task attachment information is described in these sections:

Add an attachment to a service call

You can take photos or record videos to add to service calls, or attach existing images and files. See Additional attachment options in MobileTech (page27) are available after you have added the attachment.

1. Select **Service Calls**. Select a service call, select **More.**
2. Choose the **Attachments** tab.
3. Choose **Add**.
4. Enter a description for the attachment.
5. Choose the **Attachment** tab, and then choose the menu icon.
6. Select **Choose Picture** or **Select File** or **Paste**. (The actions that display are dependent upon your device.) Go to the location where the picture or file is stored. Select the picture or file, and then choose **Open**. The attachment is displayed in the Attachment pane.
7. Choose **Save**. After you attach a file, the file description and type are shown on the **Attachments** tab for the service call.

View or change an attachment on a service call

You can view and mark up attachments that originate in Service Management or in MobileTech. File formats for attachments, such as PNG or PDF, are displayed when you choose the **Attachments** tab for a service call. So if more than one document is associated to the service call, you can easily see the file types. See Additional attachment options in MobileTech (page27) that are available after you have added the attachment.

> If an attachment is too large to be downloaded during normal processing, an **Attachment** pane will display this information. You also can use this pane to manually download the attachment.

1. Choose **Service Calls**. Select a service call, choose **More**, and then choose the **Attachments** tab.
2. Select an attachment.
   - Choose **More** to see information about the file. You can change the description of the attachment, if needed, and then save the changes.
   - Choose **Markup** to mark up the attachment. For example, if the attachment is an image of a piece of equipment that needs a part replaced, or to call out damage to the piece of equipment, you can mark up the area on the image. You can also write on the image.
3. Save the changes.

Add an attachment to equipment

You can take photos or record videos to add to equipment, or attach existing images and files. See Additional attachment options in MobileTech (page27) that are available after you have added the attachment.

1. Select **Service Calls**. Select a service call, select **More** OR go to **Customers**, select the customer, select **Location**, and then select the location.
2. Choose **Equipment** and then select the equipment.
3. Choose the **Attachments** tab.
4. Choose **Add**.
5. Enter a description for the attachment.
6. Choose the **Attachment** tab, and then choose the menu icon.
7. Select **Choose Picture** or **Select File** or **Paste**. (The actions that display are dependent upon your device.) Go to the location where the picture or file is stored. Select the picture or file, and then choose **Open**. The attachment is displayed in the Attachment pane.
8. Choose **Save**. After you attach a file, the file description and type are shown on the **Attachments** tab for the equipment.

Add an attachment to a task

You can view attachments for tasks that originated in Service Management, and you can add new attachments to tasks from your mobile device. You can also use your mobile device to mark up attachments for tasks. See Additional attachment options in MobileTech (page27) that are available after you have added the attachment.

1. Choose **Service Calls**. Select a service call, choose **More**, and then choose the **Tasks** tab.
2. Select a task, choose **More**, and then choose the **Attachments** tab.
3. Select an existing attachment to view or change. Go to step 4 to create a new attachment.
   - Choose **More** to see information about the file. The task ID and date are displayed and can't be changed. You can change the description of the attachment, if needed, and then save the changes.
   - Choose **Markup** to mark up the attachment. For example, if the attachment is an image of a piece of equipment that needs a part replaced, or to call out damage to the piece of equipment, you can mark up the area on the image. You can also write on the image.
4. Choose **Add**.
5. Enter a description for the attachment.
6. Choose the **File** tab, and then choose the menu icon.
7. Select **Choose Picture** or **Select File**. (The actions that display are dependent upon your device.) Go to the location where the picture or file is stored. Select the picture or file, and then choose **Open**. The attachment is displayed in the Attachment pane.
8. Choose **Save**. After you attach a file, the file description and type are shown on the **Attachments t**ab for the task. The attachments also are displayed on the Inspection report.

Copy and paste an attachment to a service call or task

Although you can attach images to service calls and tasks, depending on the device that you use, you sometimes can't directly attach other types of files to service calls and tasks. However, you can copy other types of files and paste them into MobileTech to be saved as an attachment to a service call or task.

For example, suppose you use an iOS device and your organization requires you to fill out PDF templates for service calls. After accessing the template from your email or a website or other shared location, you can open the file in a PDF editor app, enter information in the template, save and flatten the modified PDF, and then use the iOS **Open in** menu to copy and paste the PDF into MobileTech.

> The copy and paste options may vary, depending on your device and the apps you've installed. For information about copying and pasting specific types of files, consult the documentation for the apps that you use to open those files.

1. Open the document on your device. Long tap on it to display the available actions, and choose to open the file in an associated program, such as a PDF editor or word processing app.
2. Edit the information as needed and save your changes, flattening the document if necessary.
3. Choose the **Share** button, and then choose **Open in** > **Copy to MobileTech**. If MobileTech is open, you'll see a message that says, "Paste file wherever you want."
4. Open the service call or task to attach the file to:
   - To open a service call, choose **Service Calls**. Select a service call, choose **More**, and then choose the **Attachments** tab.
   - To open a task, choose **Service Calls**. Select a service call, choose **More**, and then choose the **Tasks** tab. Select a task, choose **More**, and then choose the **Attachments** tab.

   > If MobileTech isn't open, you'll have to navigate to the Attachments pane the next time you open MobileTech.

5. From the menu, choose **Paste** to paste the file into MobileTech.
6. Name the document and choose the **Save** icon. The file will be synced as an attachment to the service call or task.

Additional attachment options in MobileTech

Before syncing

After you have attached an image or file in the Attachment window, but you haven't synchronized your device:

- **Service Call** - You can delete the attachment.
- **Equipment** - You can delete or view the attachment. When viewing the attachment, additional options that are device-specific are available.
- **Task** - You can delete the attachment.

After syncing

After you have attached an image or file in the Attachment window, and you have synchronized your device, you have additional options that can be found by choosing the menu icon.

The following options are available, depending on your device's operating system:

- **Clear** - Removes the existing attachment. You can then choose to Capture Picture, Choose Picture, Select File, or Paste.
- **Open** - Opens the attachment in another app.
- **Copy** - Copies the attachment to the clipboard.
- **Print** - Prints the attachment.
- **Email** - Emails the attachment.
- **Export** - Allows you to save to the file system.

Create a Service Call or Request from BOB Dashboard or Tab

To create a service call from the BOB dashboard or tab:

1. Select the equipment.
2. Depending on the entity form, you can choose to:
    - **Add to Service Call**
      This option adds the equipment to the current service call. This is available on the Bob dashboard or the Service and Appointment forms.
    - **Create Service Call**
      This option creates a new service call for the equipment. This is available from the Equipment form.
    - **Create Service Request**
      This option creates a new service request for the equipment. This is available if the Equipment is linked and has an active fault. See Creating a Service Request (page28) below.

3. If the equipment has more than one fault status, the Select Fault for Call window opens and you must select the status that you are creating the service call for. (If there is only one status alert, the information is automatically added to the service call description.) The information includes the following information from Building Optimization Broker:
    - Fault
    - Target
    - System Effect
    - Recommendation

    > You can only select one status.

4. Complete the service call form.

Creating a Service Request

This option appears on the BOB dashboard or tab when you select a piece of equipment that is linked to BOB and has an active fault.

To create a service request from the BOB dashboard or tab:

1. Select the equipment and select Create Service Request.
2. In the Create Service Request window, the **Equipment**, **Client**, and **Site** fields auto-populate with their BOB names (these may be different than the Signature names, depending on your company's setup). These fields are display-only.
3. Select the **Fault** drop-down and select the fault to attach to the service request.
4. The **Issue Types** and **Priority** fields auto-populate based on the select fault and are display-only.
5. The **Description** defalts from the fault and is editable.
6. Select *Create.*
7. A confirmation message displays with the BOB workorder number.
8. Select *OK*.
9. The service request is available in Service Requests in BOB and in the Schedule Service Request list to be accepted/declined. The requestor information on the service request is the technician's name and email address.

Inspections

Inspections are custom forms (questionnaires) that your company has created. This feature is available depending on your company settings. Also depending upon your company settings, inspections can be performed for service appointments, job appointments, customers, locations, equipment, and additional work.

Completing an Inspection

To complete an inspection:

1. Access the inspections from the Home navigation by selecting **Inspections** or from the Appointment Completion form by selecting the **Inspections** tab.

   - In order for appointment details to be populated, the Inspection or Job Safety Analysis needs to be accessed via the Appointment Completion form.
   - Depending on your company settings, you may be prompted to complete the Job Safety Analysis after selecting to complete the appointment. See Complete a Job Safety Analysis Inspection (page49).
2. Select the inspection record. You can access in progress or completed inspections by selecting the View drop-down at the top and then selecting **In progress or completed**. This displays all your inspections for the current and previous week. To view the list of inspection templates:
   - From the Home > Inspections navigation, select the View drop-down and then select Templates.
   - From an Entity form, select the **New** icon in the top right corner.
3. On the Inspection form, complete the fields.
4. If you need to save the inspection before it is completed, select the **Save** icon. You can access this report from the **In progress or completed** list.
5. If any questions are required, you will need to enter that information prior to completing the inspection.
6. Select the menu icon to:
   - **Complete with a Report**: Changes cannot be made to a completed inspection.
   - **Cancel the Inspection**: Canceling the inspection clears the form and closes it.
   - **Continue Editing**: Return to the inspection to continue editing.
7. After you complete the inspection, the report displays on your device screen.
8. Select the menu icon to open the Action menu. The Actions that display are dependent upon your device. Some of the possible options are Open, Copy, Print, Email, Export, Save, Cancel.
9. Select the **Back** icon to **Save and Close**, **Discard Changes**, or **Continue editing** for the displayed report.
10. If the inspection has a regarding entity (appointment, customer, equipment, location, or service call), it will display on the entity form's Report tab (the only exception is that service appointment reports display on the Service Call's Report tab). Otherwise, the inspection report is viewable from the reports list. (Inspection > Completed View > Click Report command button on toolbar.)
11. Once you sync your device, if the inspection has a supported regarding entity, the report is accessible in Signature.

Inspection List Views

The views available in the Inspection List depend on where you access inspections. You can change which views display in Woodford. If the inspection has a regarding entity, this displays the list of inspections.

- If you open Inspections from the Home navigation, the default views are:
  - **Completed**: Displays all inspections that have been completed.
  - **Email Reports**: Displays all completed inspections that have a regarding entity with a corresponding location. The Email button displays in this view.
  - **In progress**: Displays all inspections that are open and have not been completed.
  - **In progress or completed**: Displays all in progress and completed inspections.
  - **Templates**: Displays available templates.
- If you open Inspections from an entity form, the default views are:
  - **Answered Inspections**: Displays all inspections that have been answered but not completed.
  - **Associated Inspections**: Displays inspections that have been created and associated with the entity.
  - **Completed**: Displays all inspections that have been completed.
  - **In progress or completed**: Displays all in progress and completed inspections.
  - **In progress**: Displays all inspections that are open and have not been completed.

Viewing Completed Inspection Reports

A completed inspection report is attached to the entity that the inspection was created for. On the device, you can view the reports that you've created in the past or current week.

The inspection report can be found by selecting the **Reports** icon that is found at the bottom of the following forms:

- Additional Work
- Customer
- Location
- Equipment
- Service Call
- Service Appointment: Service appointment inspections are saved to the corresponding service call.

> ⚠ If an inspection report is not associated with any of the above entities, the report can be accessed by selecting Inspections, selecting the Email Reports View, and then selecting the **Report** icon in the top right corner.

Emailing Inspection Reports

The process of emailing a completed inspection report depends on your company settings in the Inspection Report Options in MobileTech Admin.

- Server Sent Emails (page31)
  - Automatically Created Email (page31)
  - Manually Created Email (page31)
- Client Sent Emails (page31)

Server Sent Emails

With server sent emails, the inspection report is sent when you sync the device to the server. The email can be automatically created via the plugin or you can manually create the email.

Automatically Created Email

When a new inspection report is created, the email is automatically generated during the next sync. This email is only automatically generated if the Inspection Email Options exist in MobileTech Admin. The Inspection Email Options are inspection template specific, see Set up Email Options for an Inspection Report[2] for more details.

Manually Created Email

1. Select **Inspections** and then select the view drop-down to show **Email Reports**.
2. Select the completed inspection record.
3. Select **Email**.
    - If you receive the message "No Report File exists for this Inspection. Please run and save Mobile Report". In the Inspection form select the **Run Report** icon. In the Run Mobile Report window, select the menu icon and then select Save. Select the back icon to return to the Inspections list and continue with the steps below.
    - If the regarding entity is no longer on the device, a message displays asking if you want to fetch this from the server (yes/no). If you select Yes, you will need an internet/server connection to fetch the entity.
    - If more than one inspection report exists, select the appropriate report as you can only send one report at a time.
4. If your company has the email recipients set up in MobileTech Admin, you can skip this step or on the Contact list, mark the contacts to receive the emailed report as an attachment.
    - If you need to add a contact who is not on the list, select the **Add** icon. Enter the email address and then select Save.
    - If you don't select a contact, the default "email to" address set up in MobileTech Admin will receive the report.
5. Select the **Next** icon.
6. Sync your device.

Client Sent Emails

1. Select **Inspections** and then select the view drop-down to show **Email Reports**.
2. Select the completed inspection record.
3. Select **Email**.
    - If you receive the message "No Report File exists for this Inspection. Please run and save Mobile Report". In the Inspection form select the **Run Report** icon. In the Run Mobile Report window, select the menu icon and then select Save. Select the back icon to return to the Inspections list and continue with the steps below.
    - If the regarding entity is no longer on the device, a message displays asking if you want to fetch this from the server (yes/no). If you select Yes, you will need an internet/server connection to fetch the entity.
4. A list of inspection reports available that are related to the same location is displayed. Select one or more reports to include with the email. Only reports related to the same location can be included in the same email. If

2 https://wennsoft.atlassian.net/wiki/spaces/MT86/pages/6619843

the Setup Option "UseServerMode" = True, then a Server Mode switch displays at the top of the page. You can access reports you created that are currently on the server (an internet connection is required).

5. Select the **Email** icon and a list of location contacts displays.
6. On the Contact list, mark the contacts to receive the emailed report as an attachment.
   - If you need to add a contact who is not on the list, select the **Add** icon. Enter the email address and then select Save.
   - If you don't select a contact, you can still enter an Email To address when the new email editor opens via your device's client.
7. Select the **Next** icon to open your device's email app.
8. In your email app, the inspection report(s) are added as an attachment.
9. Manually send the email from your device's email app.

Appointments

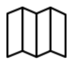
Working with appointments

To work with appointments, choose **Appointments**, or from a service call, choose the **Appointments** tab.

If MobileTech is set up to use time logs, when the appointments list is displayed, you can easily see which service appointments, job appointments, and technician activities you're timed in to. These appointments are designated with a clock icon. For more information, see Time In and Out of Appointments (page42).

To work with an existing appointment, select an appointment and choose **More**. Use these tabs to view additional information.

Icon	Description
	**Appointment** View or change appointment details. Depending on the MobileTech setup, you might be able to find links to these notes at the bottom of the Appointment pane when you view the details for a service call appointment. Depending on your company's setup, you can also access the XOi hyperlink for SEE Workflow or XOi Workflow and XOi Site History. • Customer notes • Customer location notes • Service call notes, including service call description and resolution notes • Appointment notes • Equipment notes for one or more pieces of equipment • Contract notes For any of the above links, if a note exists, the link is highlighted. You can click the links to view the notes. When you view most types of notes, a separate pane is displayed. Therefore, when you close the note, you'll return to the appointment details pane from which you opened the note. However, when you view appointment notes, the **Notes** tab for current appointment is displayed. To return to the appointment details, choose the **Appointment** tab. If you close the appointment note, you're also closing the appointment details pane, and you'll return to the appointments list.

Icon	Description
	**Map** If your device supports mapping and a valid latitude/longitude or location address is entered in Service Management, use this tab to see the mapped location of an appointment. View the location on a map. If the map does not show the correct location, you can update the GPS location using your device's GPS. For information, see Updating GPS Coordinates (page14) .
	**Notes** View notes that are associated with an appointment. Depending on the MobileTech setup, you might not be able to change an existing note. You can also create a new appointment note. For more information, see Create a Note (page52).
	**Job Safety Tasks** Depending on the MobileTech setup, this tab might not be displayed. You can use job safety tasks to complete a job safety audit of a work location before you complete an appointment. See Complete a Job Safety Audit (page49).

To enter labor, travel, expense, and inventory transactions, or to mark an appointment as complete, select an appointment in the appointments list and choose **Complete** or if you are in the Appointment window, select the menu icon and then select **Complete**. For more information, see Complete an Appointment (page35) .

To time in or out of an appointment, select an appointment from the appointments list and choose **Time In** or **Time Out**. Depending on the MobileTech setup, this button might not be available. For more information, see Time In and Out of Appointments (page42) .

To create or change an appointment for a service call, see Create or Change an Appointment (page33) .

Create or Change an Appointment

An appointment that you create from your mobile client device is pending until it's synced to the host system and the appointment ID is generated. You later can change some of the information on an appointment.

- Create an appointment (page33)
- Create an appointment when completing a job appointment (page34)
- Change an appointment (page35)
- Reassign an appointment (page35)

Create an appointment

1. Choose **Service Calls**.
2. Select a service call and choose **New Appt**.
3. Enter information in these fields, as needed.

Field	Description
***Service Call**	The default service call ID. You can't change this value.
Assign To Me	This option defaults to active. Mark this option if the appointment should be assigned to you. Your name will be displayed in the **Technician** field after the appointment is saved. If you unmark this option, the status is UNASSIGNED, and the appointment is assigned to a technician in Service Management.
Appointment	The appointment number that is generated automatically. You can't change this value.
Start Date	Select the date and time of the appointment.
Estimate Hours	Enter the estimated number of hours for the appointment.
Description	Enter a description to help identify the appointment.
Status	The status of the appointment. If the Time Log Status Update setting is enabled, the appointment status will be automatically set when you time into the appointment. Additionally, if the status is manually updated, you will be timed into the appointment.
Technician	The name of the technician that the appointment is assigned to.

*Required field

4. To see the mapped location of the appointment, choose the **Map** tab. (If you use mapping on your device.)
5. Choose the **Save** icon. The appointment appears as a pending appointment on the **Appointments** tab for the service call.
6. When you're ready to send the pending appointment to the host and complete the appointment creation process, choose the **Sync** icon.

> The date range that is created by the starting and ending sync dates must include the starting date of the appointment in order to successfully sync and create the appointment.

Create an appointment when completing a job appointment

Complete the job appointment. Prior to the final **Complete Appointment,** you will see the option to create a new appointment.

Change an appointment

You can change these appointment details:

- Start date
- Estimate hours
- Description
- Status

> If the Time Log Status Update setting is enabled, the appointment status will be automatically set when you time into the appointment. Additionally, if the status is manually updated, you will be timed into the appointment.
> If you use job safety tasks, the **Job Safety** tab might open after you change the appointment status.

On devices, service appointments and technician activities can also be drag-and-dropped on the Calendar to a different time and/or day. From the main screen, select the Calendar icon.

Reassign an appointment

To have an appointment reassigned to a different technician by your dispatcher, change the **Status** of the appointment to *RE-ASSIGN*. This removes the appointment from your device. Your dispatcher will see that you are currently assigned to this appointment and will reassign the appointment to a different technician.

Complete an Appointment

You can enter billable labor, travel, and other expenses while you complete work for an appointment. When you complete the appointment, it is marked as complete. The appointment is removed from the appointment list and can be viewed on your timesheet.

Appointment resolution information that you save on a different device doesn't appear on this device. However, the appointment will be successfully resolved, and the information will be displayed on your reports.

1. Choose **Appointments**, or from a service call, choose the **Appointments** tab.
2. Select an appointment and choose **Complete**.

   > If you are in the appointment window, to complete the appointment, you can select the menu icon and then select **Complete**.

3. You may be prompted to complete the Job Safety Report if a job safety evaluation (page49) or a job safety analysis (page49) is required before you complete work on an appointment.
4. In the Appointment panel, choose the **Call Resolution**. You can also choose **Add Snippets** to add predefined resolution note snippets. As you select the snippets, a preview is displayed in the snippet selection window. You can select as many snippets as you want, in the order that you want them listed, and then choose the **Add** icon.
5. If your company uses XOi, select the option based on your company settings that displays:
   - **XOi Workflow**
     - **SEE Workflow**: Select **Open XOi Vision**. In the window pop-up in MobileTech, a message displays "Did you complete and submit the workflow?" Ignore this message at this time. This is to be completed after the XOi workflow. In the browser that displays, enter your XOi Vision login information and complete the defined workflow. When you've completed the XOi Workflow, return to MobileTech and choose **Yes** in the pop-up.

- **XOi Deep Linking** - Select the **Open XOi Vision** hyperlink next to the appropriate field to open to the Vision app . To return to MobileTech from Vision, iOS users select **Mobile CRM**; Android users, select your device's back button.
    - **XOi Workflow**: Opens the Vision app to the Job window.
    - **XOi Site History**: Opens the Vision app to the Location History window.

6. Enter information on these tabs:

> ⚠ The tabs that are available depend on the MobileTech setup. Some functionality that is described for these tabs might not be available for your organization.

Icon	Description
	Resolution (page46) If the system is set up for you to enter resolution information for appointments, you can select call resolutions and resolution note snippets for appointments. Your system administrator determines whether a call resolution should be entered for service calls or for appointments. You can also choose **Add Snippets** to add predefined resolution note snippets. As you select the snippets, a preview is displayed in the snippet selection window. You can select as many snippets as you want, in the order that you want them listed, and then choose the **Add** icon.
	Task (page20) You can view, change, and complete information for a single task or for a group of tasks that is associated with a service call.
	Task Materials (page22) Depending on the MobileTech setup, you can view the task materials, or replacement parts, that are associated with a task for a service call. This is helpful when you're onsite at a customer location so you know what parts you'll need to have on hand to complete a task.
	Timesheet Entries (page80) You can create time entries for unbilled labor hours, expenses, and travel for the current or previous work week.
	Inventory (page40) You can enter billable inventory costs for an appointment. If you inadvertently enter an inventory item, you can delete it before it is synced.
	PO Lines (page76) You can create purchase orders on your mobile device for items that need to be purchased while on a service call. The purchase orders are sent to the host system to be processed in Service Management and in Purchasing.
	PO Receipts (page78) You can receive items on drop-ship purchase orders while on a job appointment or service call.

Icon	Description
	Summary (page47) You can view the information that you have entered for this appointment.
	SEE XOi attachment (page41) You can add an attachment and create a unique hyperlink to the XOi server. This hyperlink is copied into the **Resolution Note** section.
	Reports (page29) View any Inspection reports or Job Safety Analysis reports available for this entity. This icon displays based on your company's settings.

7. After entering the appropriate resolution information, select the checkmark icon in the top right corner.
8. Depending on how your system is set up, you might have the option to send the Appointment Summary report to appropriate personnel in the organization. You can search for a contact by entering the name, email address, or phone number. You can also add a contact by choosing the **Add** icon. See Create or Edit Location Contacts (page50) for more information.

   > If you choose *Select All* to mark all of the listed contacts, and some of the contacts display Email Missing, an "Invalid Email" message displays. You can either manually unmark any contacts with missing emails or you can select *Clear All* and then manually mark contacts with email addresses.

9. When you finish adding or selecting email addresses, choose **Next** to complete the appointment.
10. Choose from the following:
    - **Complete Appointment** - After the appointment is completed, choose the **Sync** icon to update the host system with the completed appointment.
    - **Complete and Create New** - The appointment is completed but not synced. The New Appointment window opens. When you save and sync the new appointment, this performs a full synchronization, including the completed appointment. See Create or Change an Appointment (page33) for information about creating a new appointment.

If the Call Summary report is set up, it is generated after you sync your device with the host system. This report is attached to the service call and is automatically sent by email to the recipients who are designated in the MobileTech setup.

Enter a Labor Transaction Before Completing an Appointment

Use the **Time Entry** tab to enter billable hours for an appointment.

You can also enter travel and other expenses. For more information, see Enter an Expense Transaction Before Completing an Appointment (page39).

> The information that you can enter depends on the MobileTech setup.

1. From the **Time Entries** tab for the appointment, choose the **New** icon.
2. In the **Entry Type** field, select **Labor**.
3. Enter information in these fields, as needed.

Field	Description
Employee	Your employee ID is displayed. Depending on the setup, you might be able to select a helper technician if you're entering hours for someone else.
Appointment	The appointment ID is displayed.
Date	The system date is displayed. You can change the date of the labor.
Equipment	If equipment is assigned to the appointment, you can select the equipment to see more information. You can also select different equipment for the appointment.
***Cost Code**	Select the labor category to use for this entry. Depending on the setup, a default labor cost code might be displayed. You can change this value.
***Pay Code**	Select the pay code to use for the time entry, such as **Hourly** or **Overtime**. Depending on the setup, a default billable hourly pay code might be displayed. You can change this value.
***Hours**	Enter the number of hours for the labor transaction.
Description	Enter an optional description of the labor that was performed.

*Required fields

4. Choose **Save**. This labor entry also appears on the list of timesheet entries after it is saved.

Enter a Travel Transaction Before Completing an Appointment

Use the **Time Entry** tab to enter billable travel expenses for an appointment. You can also enter labor and other expenses. For more information, see Enter a Labor Transaction Before Completing an Appointment (page37) and Enter an Expense Transaction Before Completing an Appointment (page39).

1. From the **Time Entry** tab for the appointment, choose the **New** icon.
2. In the **Entry Type** field, select **Travel**.
3. Enter information in these fields, as needed.

Field	Description
Employee	Your employee ID. Depending on the setup, you might be able to select a helper technician if you're entering travel for someone else.

Field	Description
Appointment	The appointment ID.
Appointment Status	Select the status of the appointment.
Date	The system date is displayed. You can change the date of the travel.
***Units**	Enter the number of units traveled.
***Cost Code**	A cost code of **OTHER** is displayed and can't be changed.
***Pay Code**	Select the pay code to use for the travel entry. Depending on the setup, a default billable travel pay code might be displayed. You can change this value.
Description	Enter an optional description of the travel.

* Required fields

4. Choose **Save**.

Enter an Expense Transaction Before Completing an Appointment

Use the **Time Entry** tab to enter billable expenses for an appointment. You can also enter labor and travel transactions. For more information, see Enter a labor transaction before completing an appointment and Enter a travel transaction before completing an appointment

1. From the **Time Entry** tab for the appointment, choose the **New** icon.
2. In the **Entry Type** field, select **Expense**.
3. Enter information in these fields, as needed.

Field	Description
Employee	Your employee ID. Depending on the setup, you might be able to select a helper technician if you're entering expenses for someone else.
Appointment	The appointment ID.
Date	The system date is displayed. You can change the date of the expense.
***Cost**	Enter the cost per unit.
***Quantity**	Enter the number of units.

Field	Description
Equipment	If equipment is assigned to the appointment, you can select the equipment to see more information. You can also select different equipment for the appointment.
***Cost Code**	Select the cost code to use for the expense entry. Depending on the setup, a default cost code might displayed. You can change this value.
***Pay Code**	Select the pay code to use for the expense entry. Depending on the setup, a default billable expense pay code might be displayed. You can change this value.
Description	Enter an optional description of the expense.

*Required fields

4. Choose **Save**.

Enter an Inventory Transaction Before Completing an Appointment

Use the **Inventory** tab to enter billable inventory costs for an appointment. If you inadvertently enter an inventory item, you can delete it before it is synced.

- You can add multiple service inventory items with the same exact item number provided the description entered is unique or if you have equipment assigned to one of the inventory items. You can add multiple job inventory items but they need to have different job cost codes.
- MobileTech inventory transactions do not support Microsoft Dynamics GP Inventory Lots.

1. From the **Inventory** tab for the appointment, choose the **New** icon.
2. Enter information in these fields, as needed.

Field	Description
Appointment	The appointment ID.
Transaction Date	The system date. You can change the date of the inventory transaction.
Equipment	If equipment is assigned to the service call, you can select the piece of equipment. If no equipment is assigned to the service call, this field isn't available.
Non-Inventory	Depending on the setup, you can choose **Yes** to create an entry for an item that isn't an inventory item.

Field	Description
***Cost Code**	• For a service appointment, a cost code of **MATERIAL** is displayed and can't be changed. • For a job appointment, choose the cost code.
***Site Inventory/Item Number**	Select the site inventory number. You can sort inventory items by number or by description. This is a required field for inventory and non-inventory items. More information about the item is displayed in the **Description** field. If this is a non-inventory item, enter the item number. For a job appointment, you can add the same inventory item but use a different cost code. For example, a load of mulch can be divided to different locations.
Quantity	Enter the number of units.
Unit Cost	Enter the cost per unit. This field might not be displayed, depending on the setup.
List Price	Enter the list price per unit. This field might not be displayed, depending on the setup. You can't enter negative list prices for items that have an item type of **Sales Inventory**, **Discontinued**, or **Kit**.
Description	If you select a site inventory number, information about the item is displayed. If the transaction is for a non-inventory item, you can enter a description of the inventory transaction.

*Required fields

3. Choose **Save**.

Adding an XOi Attachment

1. On the **See** tab, choose **Image(s)/Video(s)**.
2. Choose **Refresh** to display newly added image(s)/video(s). Choose the images/videos you want to attach.
3. Choose **Create URL**. A unique hyperlink to the XOi server is created and copied into the **Resolution Note** section. The hyperlink to the XOi server is available for 30 days.

   You can only add one URL to the Resolution Note. If you attempt to add the URL a second time, the following message will display "Please clear the existing Url before adding another one."

4. After syncing to the back office, the hyperlink is available in the resolution section of the Appointment Summary and Call Summary reports. The summary PDF is emailed to the customer automatically during the appointment sync process. Anyone who has access to the hyperlink can download the image/video from the Vision website.

Time In and Out of Appointments

Depending on the MobileTech setup for time logs, you can time in and out of an appointment without entering a manual time entry. If MobileTech is set up to use time logs, a clock icon displays to the left of the appointment ID in the Appointments list. You can time in and out as many times as you need to before you complete the appointment. Your hours are saved as a labor entry after each time out.

Billable hours are calculated based on the in and out times, and these hours are displayed on the **Time Entry** tab for the appointment. Depending on the setup for time logs, you might be able to change these hours when you're completing the appointment. If MobileTech is set up to use time log, the dates and times for the time in and time out entries, along with the hours, pay code, and description, are displayed in the Appointment Summary Preview and Job Summary Preview panes, and on the Call Summary and Appointment Summary reports.

The dates and times for timing in to and out of appointments and activities are displayed according to the date settings on the device.

1. Choose **Appointments**.
2. Select an appointment and choose **Time In** (or **Time Out)**. Depending on the action you're taking, one of these panes opens:

   - **Time In** - The appointment ID is displayed, in addition to the status and current date/time for the appointment.

Appointment	The appointment ID can't be changed. To work with a different appointment, go to the appointments list, select an appointment, and then choose **Time In**. To view more information about the appointment, select the appointment ID.
Status	Select the Status. If the Time Log Status Update setting is enabled, the appointment status will be automatically set when you time into the appointment. Additionally, if the status is manually updated, you will be timed into the appointment.
Time In	The current date/time displays. Depending on your setup, you may have the ability to modify the timestamp.

   - **Time Out** - The information entered in this window defaults to the Time Entry window.

Appointment	The appointment ID can't be changed. To work with a different appointment, go to the appointments list, select an appointment, and then choose **Time Out**. To view more information about the appointment, select the appointment ID.

Status	Select the Status. If the Time Log Status Update setting is enabled, the appointment status will be automatically set when you time out of the appointment.
Time In	The date and time that you last timed in to the appointment. Depending on the setup, you might be able to change these values. If the Time Log Status Update setting is enabled, the appointment status will be automatically set when you time into the appointment. Additionally, if the status is manually updated, you will be timed into the appointment.
Time Out	The current date and time. Depending on the setup, you might be able to change these values. The **Labor Hours** value is recalculated after you save.
Labor Hours	The labor hours are calculated based on the time in and time out. Depending on the setup, this time might be rounded off, such as to the nearest 5 or 15 minutes. Depending on the setup, you might be able change the value in this field. The time out increments accordingly as the hours are adjusted.
Cost Code	Select the labor category to use for the time entry. Depending on the setup, a default labor cost code might be displayed. You can change this value.
Pay Code	Select the pay code to use for the time entry. Depending on the setup, a default billable hourly pay code might be displayed. You can change this value.

You can time out on a different device than you used to time in only if you sync in between the time-in and time-out.

3. Choose **Save** to log your time.

After the time entry is complete, it is saved to the appointment. You can also view the **TimeLog Labor** entry in the timesheets list.

Delete Time-In for Service Appointments

If you have timed into an appointment in error, depending on your company's settings, you can delete the time-in if you haven't synced your device.

To delete a time-in:

1. Choose **Appointments**.
2. Select the appointment and select **Delete Time In**.
3. In the confirmation window, select **Yes**.
4. In the next window,

- If you have auditing enabled for appointmentstatustimestamp (Create & Update), you will receive prompt asking if you want to revert the appointment status. No appointment status selection needed, the appointment status automatically is reverted.
- If auditing is not enabled or you selected No to the Revert message, you have the option to manually update the appointment status.

Enter Work Crew Activity

Depending upon your MobileTech settings, you may see options that enable you to enter labor, expense, and/or travel transactions for other employees called a “work crew”. We consider a work crew to be a team of two or more field resources who are working at the same location, typically on the same days of the week, performing similar or related tasks. That ‘crew’ typically has a team leader and that team leader is responsible for entering the labor, expense, and travel activity for the crew members.

Notes:

- Work crews must first be set up in TimeTrack and then activity for each member of the crew can be logged via MobileTech.
- The team leader who will be entering activities for the crew must also be a member of that crew in TimeTrack.

Select and assign a work crew to a labor, travel, or expense transaction for an appointment.

1. Choose **Appointments**.
2. Select an appointment and choose **Complete**.
3. Choose the **Time Entry** tab, choose the **New** icon.
4. Under the **Work Crew** banner, enter the time entry information.
5. Select the **Work Crew** banner to open the Work Crew Lookup.
6. In the Work Crew Lookup window, select the work crew or use the Search field at the top of the window to search for a specific work crew. You also have the option to filter and sort by name.
7. In the Work Crew Employees window, select the members of the work crew to assign to the service call. You can choose **Select All** or mark specific members. You can also select a marked member to clear the checkbox to exclude them.

   > Only the members who have the Pay Code that you selected on the Appointment Completion window will display in this list.

8. Choose the **Save** icon to create the time entry records for yourself and the selected work crew members.
9. The time entry records display on the Time Entry tab for the appointment.

Create a Technician Activity Appointment

Depending on your company's settings, you can create a technician activity appointment from the calendar. Examples of technician activities: meetings, jury duty, sick days, and training, etc.

> - MobileTech does not perform any conflict resolution for overlapping technician activities. You are able to create more than one activity for the same day/time.
> - Estimated hours entered cannot be more than 24 hours.

To create a technician activity:

1. Select the **Calendar** icon in the left navigation.
2. Select the Add icon in the top right corner.

3. In the Appointment form, complete the following:
    - **Technician**: Activity: Select the technician activity.
    - **Start Date**: Auto populates if a date and/or time was selected on the calendar.
    - **Estimated Hours**: Enter the estimated hours for the activity.
    - **Description**: (Optional) Enter a brief description of the activity.
    - **Status**: Select the status of the activity.
    - **Technician**: Auto populates with your technician ID.
4. Select *Save*.
5. Sync your device.

Enter Time for Technician Activities

You can enter time and other information for technician activities – such as meetings, jury duty, sick days, and training – that are set up in MobileTech, Service Management, or Schedule, and then change and complete the activities from your mobile device. After you complete an activity, you can sync the activity from the device.

- Entering Time (page45)
- Completing a Technician Activity (page46)

Entering Time

You can also access the Technician Activity form from the Calendar.

1. Choose **Appointments**.
2. At the top of the pane, choose the **Technician Activities** filter. Technician activities that are created in Service Management are displayed. If MobileTech is set up to use time logs, you can easily see which technician activities you're timed into. A clock icon is displayed for these activities.
3. Select a technician activity and choose **More**.
4. Enter information in these fields, as needed.

Field	Description
Activity	The type of activity that was set up in Service Management. You can't change this value.
Start Date	The date that was designated for the activity. You can change the date and time for the activity.
Estimate Hours	The hours that were designated for the activity. You can change the estimated hours, unless one or more labor transactions have been saved for the activity.
Description	The description of the activity. Limited to 50 characters.
Status	The status of the activity.

Field	Description
Technician	The technician who is assigned to the activity.

5. To record the time when you start the activity, depending on your company's settings, you may be able to enter more than one time entry for the appointment.
    - You can select the technician activity and choose **Time In** to update the time and date of the start of the activity. When you complete the activity, choose **Time Out** to update the ending time for the activity.
    - You can also enter a specific time if you have access to the Time Entries tab on the Appointment form by selecting the **Add** icon. Enter the **Hours** and select the **Pay Code** (if required). Select **Save**.
    For more information about how to complete information for pay codes for the activity, see Setting up default pay codes (page0) .

Completing a Technician Activity

1. When you are ready to complete the activity, you can:
    - Select the activity and then select **Complete**.
    - Select the activity, select **More**. While viewing the activity details you can select the checkmark icon to **Complete**.
2. If you've already timed-in to the appointment but haven't yet timed-out, a message is displayed and you can enter time-out information.
3. Depending on your company's settings, when you complete the appointment, the Labor window may display so that you can enter at least one time entry before completing the appointment.
4. The activity is removed from the appointment list and can be viewed on your timesheet.

> Prior to syncing your device, if you need to reopen a completed Technician Activity appointment, you can delete the tech activity time entry from the Time Entries window.

Enter an Appointment Resolution

If the system is set up for you to enter resolution information for appointments, you can select call resolutions and resolution note snippets for appointments. Your system administrator determines whether a call resolution should be entered for service calls or for appointments.

1. Choose **Appointments**.
2. Select an appointment and choose **Complete**.
3. On the **Resolution** tab, enter information in these fields, as needed.
4.

Field	Description
***Appointment**	The default appointment ID. You can't change this value.
***Service Call**	The default service call ID. You can't change this value. Select the service call to view details about the service call that is associated with the appointment.

Field	Description
Completion Date	By default, the system date is displayed, but you can select a different date for the resolution.
Call Resolution	Select a call resolution to describe how the appointment was resolved. You can also enter information in the **Resolution Note** field to include more details.
Internal Note	Choose **Yes** if the information should appear only on internal reports and not on reports that are available to customers. Choose **No** if the note isn't internal.
Resolution Note	To include additional information, enter a resolution note. You can also choose **Add Snippets** to add predefined resolution note snippets. Select as many snippets as you want, in the order that you want them listed, and then choose the **Add** icon. To change an existing resolution note, add the information to the top or bottom of the existing note. Blank resolution notes aren't saved. Depending on the setup, this may be a required entry. If the resolution note exceeds 32,000 characters when appending the note, the note will be truncated in Signature to display only the first 32,000 characters. If this truncation occurs, an email is sent that includes the text added to the note and indicates the text that has been truncated.
Resolution History	Displays information about the completed appointments for the service call.

* Required field

5. Choose **Save**.

Complete the Summary Tab

The Summary tab displays the information that you have entered for this appointment. Depending on your setup, this information is also displayed on the Call Summary and Appointment Summary report. Once you complete the appointment, you cannot enter additional information about this appointment. If the Call Summary and/or Appointment Summary report are set up, they are generated, attached to the service call, and sent by email to the recipients who are designated in the MobileTech setup.

The Call Summary and Appointment Summary reports are attached to the service call and service appointment and can be viewed in Signature.

> If you are using Flexible Forms, a **Refresh** icon displays on the Summary tab. You may need to refresh the form to see the latest updated.

Reviewing the details

1. On the **Summary** tab, review the details that you entered for this appointment.
   - Service Summary
     - Service Call
     - Appointment
     - Opened
     - Completed - This can be edited on the Resolution tab.
     - Description
   - Customer Location
     - Customer
     - Address information
   - Call Details
     - Problem Type
     - Call Type
     - Customer PO
     - Technician
     - Resolution Note
   - Call Resolution
     - Name
     - Description
   - Task Summary
   - Time Entries
   - Consumed Inventory
   - Purchase Order
2. Select the *Customer Signature* button to collect the customer's signature, if needed based on setup. Enter the required customer name at the top and have the customer sign their name. See Collecting signatures[3] below for more information.

   Turn the device horizontally to increase the size of the signature field.
3. Select the *Technician Signature* button to add your signature, if needed based on setup.
4. After confirming the information, choose checkmark icon. Depending on the MobileTech setup, you might need to enter information on one or more of the appointment completion tabs.
   - If a "Missing required data" message is displayed, you must complete the required information before the appointment can be completed.
   - If a "Missing recommended data" message is displayed, you can enter the missing optional data, complete the appointment, or cancel.
5. When the confirmation message is displayed, choose **Complete Appointment** .
6. The appointment is removed from the list of appointments. If the Call Summary or Appointment Summary report is set up, it is generated, attached to the service call, and sent by email to the recipients who are designated in the MobileTech setup.

Collecting Signatures

Use the **Summary** tab to sign off on an appointment and capture the customer's signature when the work is complete. Depending on the MobileTech setup, the signature capture may be required before the appointment can be completed. The signature capture is an optional feature that is enabled in setup.

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3 https://wennsoft.atlassian.net/wiki/pages/resumedraft.action?draftId=6619646#CompletetheSummaryTab-collecting

If you need to obtain signatures (Customer and/or Technician), scroll to the bottom of the Summary tab window and choose the appropriate button. If a signature is missing, the button displays as red. Once the signature is obtained, the button displays as green. If you need more space for a signature, turn your device horizontally to rotate the screen and the signature field will be full screen.

- **Customer Signature**
  Enter the customer's name or the name of the contact who represents the company. Enter the customer name, and then request that the customer sign in the box below the name.
- **Technician Signature**
  Your name displays for the technician name. Sign in the box below your name.

Complete a Job Safety Audit

Depending on the MobileTech setup, job safety audit (JSA) tasks might be available to help you assess the safety of a work location before you complete a service appointment.

Job safety tasks identify safety standards and potential risks and hazards. After a job safety audit is complete, you can create a Job Safety Audit report.

> Depending on the setup, a job safety audit might be required before you can complete a service appointment. If any of the responses are required, which is indicated with an asterisk *****, you must complete the response before you can navigate to the next response. You can exit the form by clicking the back button and selecting Discard Changes. The JSA report cannot be requested until all of the required responses have been entered.

Start the job safety audit process

The job safety audit process begins when the status of an appointment matches the job safety starting status that was defined during setup. For example, if the starting status is **DISPATCHED**, job safety tasks are available for you to complete when the appointment status is **DISPATCHED** .

> You can access the job safety tasks regardless of the appointment status. However, if **JobSafetyValidationLevel** = **REQUIRED** in the setup options, you can't complete the appointment until the Job Safety report is requested.

1. Choose **Appointments**.
2. Select an appointment and choose **More**.
3. Change the status of the appointment, if necessary.
4. Select the designated job safety start status and choose the **Job Safety Tasks** tab to view job safety tasks.
5. Select a task.
6. Complete the task by entering a response, as required.
7. Choose **Next** to go to the next task or choose the **Save** icon to return to the task list.
8. Continue completing job safety tasks until you finish all of them.

Complete a Job Safety Analysis Inspection

Depending on your MobileTech setup, you have the option to use the Job Safety Analysis to assess the safety of a work location before you complete a service or job appointment. Job Safety Analysis identifies safety standards and potential risks and hazards. After a Job Safety Analysis is complete, you create the Job Safety Analysis report. This report is attached to the service call for service appointments or to the job cost code for job appointments. Depending on the setup, a Job Safety Analysis might be required before you can complete an appointment. The Job Safety Analysis report created by the current user stays on the device for the current and previous weeks. Depending on your company's setup, this report may also be automatically emailed to you when the device is synced.

Start the Job Safety Analysis

To access the Job Safety Analysis for an appointment:

1. Choose **Appointments**.
2. Select an appointment and choose **Complete**.
3. Depending on your company's setup:
    - For a service appointment, a Job Safety Analysis inspection may be required once you change the appointment status or before you can complete the service appointment.
    - For a job appointment, a Job Safety Analysis inspection may be required before you can complete the job appointment.
    - If the Job Safety Analysis is not required, you can access the Job Safety Analysis from the service or job appointment completion form by selecting the **Inspections** tab and then selecting the **Add** icon. Select **Job Safety Analysis** from the list.
4. The top of the JSA displays the date, Appointment ID, Inspector name (you), and the customer/location.
5. Under **General Information**, enter the following:
    - Emergency Phone #
    - Location(s) of First Aid
    - Safety Shower/Eye Wash Location(s)
    - Description of Work Being Performed
6. Complete the **Identify Potential Hazards** section. When you identify that a task is a potential hazard, you are required to enter what makes the task a hazard and how you can mitigate or eliminate the hazard.
7. If there are any other Hazards, you can add these in the **Additional Hazard Assessments** section.
8. Under **Review**, you can indicate if the Location is Safe.
9. Under **Signature**, enter your name and then sign the device.
10. To save the JSA as In Progress, select the *Save* icon. This does not complete the JSA.
11. To complete the JSA, select the menu icon.
12. Select **Complete with a Report**. (You can also *Cancel the Inspection*.)
13. Select *Yes* to verify that you want to complete the inspection.
14. The Job Safety Analysis report is run. You can also access this report by selecting the Reports icon from the Service Call form.
15. In the report confirmation window, you are prompted if you want to show the report. Select *Yes* to view the report or select *No* to close the report window.

Create or Edit Location Contacts

Depending on your setup options:

- You can add or edit Contacts.
- You may have the option to select Report email recipients.

Contacts added in MobileTech synchronize to Signature where the back office will review and process.

- Creating a new contact from Report Emails (page51)
- Creating a New Contact from Locations or Service Call (page51)
- Editing an existing contact name, email, and/or role (page52)
- Editing a phone number (page52)

Creating a new contact from Report Emails

After completing an appointment, the Appointment Summary Report Emails window displays a list of contact names and email addresses. If a contact does not have an email address, **Missing Email** is shown. Although contacts may have telephone numbers associated, this list only displays the contact's email addresses.

1. Complete the appointment.
2. From the Appointment Summary Report Emails window, select the **Add** icon.
3. In the Create Contact window enter the following:
    - **Contact Name** (required)
    - **Email** (required)
    - **Role** - You can choose an existing role or add on-the-fly.
    - **Phone Number** - The phone number field will automatically display the telephone format as you type the telephone number. If a user has an extension, "ext:" will populate after you've entered the 11th number.

      > You can only add one phone number to a new contact. Once you've synced the contact to the back office, you can add additional phone numbers.

    - **Phone Type** - If you select a Phone Type, the Phone Number field becomes required.
4. Choose *Save*.

   > Each contact must have a unique email address and phone number combination. If you enter a duplicate email/phone combination, you are prompted to discard or update the original entry with the new form field entries.

Creating a New Contact from Locations or Service Call

The Contacts window displays the contacts associated with the customer location. The contact's email address and telephone number(s) display beneath the contact name.

You can add a new contact from the Locations window or the Service Call window by selecting the **Contacts** tab icon.

1. Choose **Customers** and select the customer. Select **Locations** and then select the Location OR choose **Service Calls**, select the service call and choose **More**.
2. Choose **Contacts**.
3. Select the **Add** icon.
4. In the Create Contact window enter the following:
    - **Contact Name** (required)
    - **Email** (required)
    - **Role** - You can choose an existing role or add on-the-fly.
    - **Phone Number** - The phone number field will automatically display the telephone format as you type the telephone number. If a user has an extension, "ext:" will populate after you've entered the 11th number.

      > You can only add one phone number to a new contact. Once you've synced the contact to the back office, you can add additional phone numbers.

    - **Phone Type** - If you select a Phone Type, the Phone Number field becomes required.
5. Choose the **Save** icon.

> Each contact must have a unique email address and phone number combination. If you enter a duplicate email/phone combination, you are prompted to discard or update the original entry with the new form field entries.

Editing an existing contact name, email, and/or role

1. To edit an existing contact's name, email, and/or role, choose the **Edit** icon to the right of the contact name.
2. Edit the appropriate information.
3. To add a telephone number choose **Add Phone** and enter the *Phone* and select the *Phone Type*. The phone number field will automatically display the telephone format as you type the telephone number. If a user has an extension, "ext:" will populate after you've entered the 11th number.
4. Choose the **Save** icon.

Editing a phone number

1. To edit an existing phone number, choose the **Edit** icon to the right of the phone number.
2. Edit the number and/or phone type. The phone number field will automatically display the telephone format as you type the telephone number. If a user has an extension, "ext:" will populate after you've entered the 11th number.
3. Choose the **Save** icon.

Create a Note

You can create notes for records such as service appointments, locations, service calls, job change orders, equipment, and equipment contracts.

1. Choose the **Notes** tab for an entity.
2. Choose the **New** icon.
3. Enter a subject and text for the note.
4. In the **Internal Note** field, choose **Yes** if the information should appear only on internal reports and not on reports that are available to customers.
5. Choose the **Save** icon.

The note is created and saved together with your user ID and the date and time. When you sync with the host system, the new note information is added to the appropriate record.

Setting an Unsafe Work Environment Status

Depending on your company's setup, if you determine there are safety issues that could prevent you from performing work, you can alert the office that the site is unsafe and provide a record in the host system.

If you haven't timed into the the appointment, you can change the status to the unsafe status that your company has set up. If you have already timed into the appointment, you are prompted to time out before you can change the status. Once the appointment status has been changed to the unsafe status, you will not be able to time in or complete the appointment. The following message displays: "Synchronize your device before working with this appointment." The appointment is removed from your device after you perform a sync.

Field Invoices and Customer Payments

You can generate a field invoice and then collect payment for the invoice for a service call. If there are multiple appointments for a service call, all appointments for that service call must be completed before an invoice is generated for the service call.

If your system is set up to preview invoices, you can preview the invoice before you generate the customer (field) invoice and transmit it to the back office. When all the appointments on your device are completed for a service call, all costs entered for the individual appointments are included on the preview invoice, including costs added by other technicians and/or the back office. You can view the invoice on your mobile device.

This functionality is available only if your organization uses Field Invoicing and Field Payments. For more information, contact your system administrator.

Before You Generate a Field Invoice

Based on the options that are set up in MobileTech Administration and the processes that your organization follows, you can complete these procedures before you start the field invoicing process.

Task	For more information, see ...
Add labor charges for the appointment	Enter a Labor Transaction Before Completing an Appointment (page37)
Add travel charges for the appointment	Enter a Travel Transaction Before Completing an Appointment (page38)
Add expense charges for the appointment	Enter an Expense Transaction Before Completing an Appointment (page39)
Add inventory material charges for the appointment	Enter an Inventory Transaction Before Completing an Appointment (page40)
Add purchase charges for the appointment	Create a Purchase Order (page76)
Receive drop-ship purchase orders for the appointment	Receive Items from a Drop-Ship Purchase Order (page78)
Complete tasks for a service call appointment	Complete Tasks for a Service Call (page20)
Collect a signature from the customer and sign off on the appointment	Collecting the Signature for the Field Invoice Report (page56)
Add a resolution note	Enter an Appointment Resolution (page46)

Based on the MobileTech setup, some or all of the following information is displayed on the preview invoice and the field invoice:

- Time entry information (page54)
    - Labor (page54)
    - Travel (page54)
    - Expenses (page54)
- Inventory (page54)
- Signatures information (page55)

Time entry information

All labor, travel, and expense billable line totals are listed separately on the field invoice. There might be a combination of positive and negative billable line totals. Billable line amounts are added to or subtracted from the subtotal on the invoice.

Labor

> If your time card in TimeTrack has been committed by another user (such as someone in the Payroll department), and this occurred before the service call was complete the field invoice was generated, that labor expense won't be displayed on the field invoice. The labor expense will be displayed if the time card hasn't been committed, or if it's been committed and the expense transaction has been posted.

- Labor cost category
- Date when the labor transaction was completed
- Description of the labor transaction
- Technician associated with the labor
- Unit of hours for the labor
- Quantity, unit price, and total for the labor transaction

Travel

- Travel cost code category for each travel expense
- Date when the travel transaction was entered
- Description of the travel expense
- Quantity, unit price, and total for the travel transaction

Expenses

- Cost category that was selected when the expense transaction was entered
- Date when the expense transaction was entered
- Description of the expense transaction
- Quantity, unit price, and total for each expense transaction

Inventory

- Equipment used for the service call
- Quantity and price of the site inventory item

- Inventory items from a purchase order that is associated with the invoice

Signatures information

The customer signature, if required. If a customer signature isn't captured for the completed service call, the customer signature area is blank on the field invoice. The customer signature isn't displayed on a preview invoice. See Collecting the Signature for the Field Invoice Report (page56).

Generate a Field Invoice for an Appointment

Depending on your company's MobileTech setup, you can request to preview a field invoice before you generate the invoice for a service appointment.

> ⚠ For the preview request to be automatically synced, make sure that **Sync Login** is set to **On** on the Resco Setup page. If this option is set to **Off**, you'll need to manually sync before you can preview the field invoice. (Setup > Resco)

For additional information, we recommend that you review Before You Generate a Field Invoice (page53).

1. Open an appointment from the appointment list or from a service call.
    - Choose **Appointments** and select an appointment.
    - Choose **Service Calls**, choose **More**, choose the **Appointments** tab, and select an appointment.
2. Choose **Complete** to complete the steps that are required for the appointment, such as adding labor, travel, and expense charges for the appointment.

   See Complete Tasks for a Service Call (page20) for information about the tasks to complete before you complete the appointment and generate a field invoice. Tasks are displayed, depending on the setup.

   > ⚠ For more information about steps that you might need to complete for appointments, see the Appointments (page32) section of Help, which includes procedures about how to enter information on tabs that you might need to complete for an appointment.

Preview the field invoice

Depending on your company's setup, after you complete the steps for an appointment, you can preview the field invoice.

1. Choose the **Reports** tab.
2. Select **Field Invoice Report** and choose **Request** to preview the field invoice.
3. A message displays that the preview will be requested upon next sync, select **OK**.
4. Select the **Sync** icon.
5. Go back to the appointment and select the **Reports** tab.
6. The Field Invoice Report should display that it is **READY**.
7. You can open the attachment to preview the field invoice.

   > ⚠ The customer signature does not display on the field invoice preview.

8. At this point, you can have the customer sign off. See Collecting the Signature for the Field Invoice Report (page56).
9. Choose **Complete** to generate the field invoice.

10. The payment details fields are displayed. Depending on your organization's processes and the MobileTech setup, you can then collect payment from the customer in the field.
11. If you don't want to collect payment at this time, choose **No** for **Collect Payment**. See Collect Payments from Customers (page56) for more information.

Collecting the Signature for the Field Invoice Report

Depending on your field invoice settings, you have the option to have two different signatures for the Call Summary Report and the Field Invoice Report. Technicians can capture a separate signature for the Field Invoice Report or they can use the customer's signature from the Appointment Summary.

- Use Summary Signature (page56)
- Capture Signature (page56)

Use Summary Signature

If the Call Summary Signature is to be used, select *Use Summary Signature* to copy that signature to the Field Invoice Report. For information on the obtaining the Summary tab signature, go to Complete the Summary Tab (page47).

Capture Signature

If you need to collect a different customer signature for the field invoice than the customer signature on the Summary tab, select *Capture Signature* on the Field Invoice Report. If you need more space for a signature, turn your device horizontally to rotate the screen and the signature field will be full screen. Enter the customer's name or the name of the contact who represents the company. Enter the customer name, and then request that the customer sign in the box below the name.

> A customer signature captured from the Report tab is only attached to the Field Invoice Report.

Collect Payments from Customers

Technicians aren't required to collect payments from customers in the field. However, depending on your organization's processes and the MobileTech setup, you can collect a full or partial payment for a field invoice after you complete a service call appointment and generate a field invoice for the appointment.

These types of payments can be used:

- Cash
- Check
- Card

You can accept more than one type of payment for an individual invoice, but the payment fields in MobileTech can be used only one time per service call appointment. For example, you can collect cash and accept a check payment for the same invoice. However, you can't accept two check payments for the same invoice.

Before you can collect payment from a customer, you must complete the appointment. The payment amount is displayed on the field invoice when it is generated. See Generate a Field Invoice for an Appointment (page55) .

> ⚠ If you preview an invoice and then collect a payment, the amount due that is displayed on the actual customer invoice reflects the payment that was collected.

For more information, see these sections below:

- Collect payment[4]
- View invoice and payment information[5]

Collect payment

After you create a field invoice, the payment detail fields display this information from the customer's invoice.

Field	Description
Service Call	The ID of the service call that is associated with the payment.
Customer	The customer number and name that are associated with the service call ID.
Location	The customer location that is associated with the service call ID.
Invoice Number	The number of the invoice that was created and that the payment is associated with.
Subtotal	The amount of the invoice before taxes, if any, are applied.
Total tax	The amount of tax that is applied to the invoice amount.
Invoice Amount	The total amount of the invoice.
On Account	The amount that is owed by the customer. This amount is recalculated each time that you enter a payment amount.
Transaction Date	The date of the invoice and payment transaction.

1. Select one or more types of payment. You can select more than one payment type, but you can enter only one amount for each type.
   The amount from the **On Account** field is displayed in the **Amount** field for the payment type that you select. If you select more than one payment type, the amount from the **On Account** field is displayed in the **Amount** field for the first payment type that you select. Values in the amount fields for the various payment types change as you enter cash, check, and credit card amounts. The total amount of all payment types is calculated and then printed in the **Amount Paid** field on the customer's field invoice.
2. If you selected **Cash**, enter the amount that the customer paid in cash. **Cash Amount** is a required field.

4 https://wennsoft.atlassian.net/wiki/pages/resumedraft.action?draftId=6619664#CollectPaymentsfromCustomers-collect-payment
5 https://wennsoft.atlassian.net/wiki/pages/resumedraft.action?draftId=6619664#CollectPaymentsfromCustomers-view-invoice-payment-info

3. If you selected **Check**, enter the amount of the check and the check number. **Check Amount** and **Check Number** are required fields.
4. If you selected **Card**, enter the amount paid by credit card in the **Card Amount** field and select the type of credit card in the **Card Name** field. Only card names that are set up in the Credit Card Setup window in Microsoft Dynamics GP and that can be accepted from customers are available.
5. Based on your organization's policies and the application that is used by your organization to process credit cards, you might have to enter an authorization code that is returned from your credit card processor. If your organization requires an authorization code, your supervisor or another administrator in your organization will let you know if it must be supplied.
6. Choose the **Save** icon to save information that you entered and to start processing the customer's payment.

   > If you choose **Close**, a message is displayed and you can save and close, discard the changes, or continue editing.

7. Choose the **Sync** icon to update the invoice with the payment amount.
8. After you choose the **Save** icon, you can send the invoice by email to the customer. Payment information and the amount due, if any, are calculated and displayed on the invoice.

   > Don't remove the appointment from your device until the invoice is completed.

View invoice and payment information

You can view processed invoices, unprocessed invoices, or all invoices, along with a payment summary of each invoice, if payments are being collected.

1. Choose **Invoices**. Select whether to view processed, unprocessed, or all invoices. By default, all invoices are displayed. Your selected view will be saved the next time you view the invoice and payment information.

   > If your organization doesn't use Field Payments, the list of processed invoices will be empty.

2. To view the payment summary, select **Processed Invoices**.
3. Choose the **Payment Summary** icon to view the payment summary including the technician name, invoice number, customer, location, service call number, payment details, and report totals for the day and week. The **Technician** information and **Date Created** also display. You have the option to view the **Current Week** (default) or the **Previous Week**. The dates can be sorted ascending or descending. You can select **Collapse All** to view only the date, payment information, and totals or **Expand All** (default) to view all details. The device may need to be rotated to landscape view to display the data.

Job Appointments

You can view job appointments in the appointments list. Job appointments are set up in the Appointments window in Signature Job Cost and some information can be changed in MobileTech. Depending on your company's setup, you may need to complete a Job Safety Analysis (page49).

> You can change only the estimated hours and the description of the job appointment in MobileTech.

1. Choose **Appointments**. At the top of the pane, choose the **Job Appointments** or **All Appointments** filter.
   If MobileTech is set up to use time logs, you can easily see which appointments you're timed into. A clock icon is displayed next to these appointments.
2. Select a job appointment and choose **More** to display the job details.

3. View the information in these fields. You can also edit the **Estimate Hours** and **Description** fields.

Field	Description
Job Number	The job number the appointment is for.
Location	The location for the job appointment that was set up for the job in Job Cost. To add a note about the location or to view existing notes, select the location. In the Location pane, choose the **Notes** tab.
Customer Name	The name of the customer that the job appointment is assigned to.
Job Description	The description of the job that was set up in Job Cost.
Address	The address for the appointment.
City	The city for the appointment.
Start Date	The starting date for the appointment that was set up in Job Cost. The appointment time displays to the right of the date.
Appointment	The appointment number for the job that was set up in Job Cost.
Estimate Hours	The estimated number of hours that the appointment will take. This value is set up in Job Cost, but you can change it before the job is posted.
Description	Enter or change the description to help identify the job.
Cost Code	The cost code for the job appointment that was set up in Job Cost.

4. If a note has been added to the job appointment from the back office or if a job resolution note has been added, the **Notes** tab displays in the bottom right of the Job Detail window. Choose the **Note** tab and then choose the note to view as read-only.
5. Depending on the MobileTech setup, you can choose the **Change Order** tab to view or edit change orders for the job, or choose the **New** icon to create a change order. Enter a description and an amount for the change order. The change order number is a temporary value until you sync your device with the host system. See Enter and Edit Change Orders for Jobs (page60) for more information.
6. Choose the **Save** icon.

Additional topics

- Enter and Edit Change Orders for Jobs (page60)
- Complete a Job Appointment (page62)
- Complete the Summary Tab for a Job Appointment (page63)

Enter and Edit Change Orders for Jobs

You can enter change orders that apply to a job, and you can also assign specific cost codes to individual change orders.

> If you assign a cost code to a change order, you must sync with the host system, and then select the cost codes for the change order in MobileTech.

You can add cost codes to a change order and edit the change order and cost codes for the change order until it has a **Posted** status.

For more information, see these sections:

- Enter a change order (page60)
- Edit an existing change order (page60)
- Assign a cost code to a change order (page60)
- Adding a Note to a Change Order (page62)

Enter a change order

1. Choose **Appointments**.
2. At the top of the pane, choose the **Job Appointments** filter.
3. Select a job appointment and choose **More** to show the details of the job appointment.
4. Choose the **Change Order** tab. A list of change orders that have already been entered for the job is displayed.
5. To enter a change order, choose the **New** icon. Information, including the job number, change order number, status, and contract type, is displayed. The change order number is a temporary value until you sync your device with the host system.
6. Enter a description, and then enter the amount of the changed order in the **Change Order Amt.** field.
7. Choose the **Save** icon. The change order is added to the job appointment.

Edit an existing change order

1. Choose **Appointments**.
2. At the top of the pane, choose the **Job Appointments** filter.
3. Select a job appointment and choose **More** to show the details of the job appointment.
4. Choose the **Change Order** tab. A list of change orders that have already been entered for the job is displayed.
5. Select the change order to update, and then change the description and the change order amount, as needed. The fields that you can change depend on the status of the change order. You can enter and update a change order until it has a **Posted** status.
6. Choose the **Save** icon.

Assign a cost code to a change order

1. Choose **Appointments**.

2. At the top of the pane, choose the **Job Appointments filter**.
3. Select a job appointment and choose **More** to show the details of the job appointment.
4. Choose the **Change Order** tab. A list of change orders that have already been entered for the job is displayed.
5. Select the change order.
6. Choose the **Cost Codes** tab to view and change cost code information for each change order.
7. To add a new Cost Code, choose the **New** icon.
8. Select a cost code. Cost element and cost code information is displayed.
9. Enter information in these fields, as needed. The information that is displayed depends on whether you're creating or viewing an existing cost code record. The fields that you can change depend on the status of the change order. You can enter and update a change order until it has a **Posted** status.

Field	Description
Job Number	The default job number.
Change Order #	The default change order number for the job.
Cost Element	Cost elements, which are associated with cost codes, can't be changed. When you create a cost code record for a change order, this field isn't available. However, when you choose a cost code, the cost element that is associated with the cost code is displayed. For an existing change order, the cost element for the cost code is displayed. The cost element changes when you change the cost code.
***Cost Code**	For a new cost code record for a change order, enter a cost code. For an existing cost code, the default cost code and cost element for the change order are displayed, but you can select a different cost code if the change order isn't posted.
Est. Units	For a new cost code record for a change order, enter the number of estimated units that are required for the change order. The type of units is based on the method of measuring units that you select in the **Estimate Measure** field.
Est. Amt. Per Unit	Enter the estimated amount per unit of the cost code for the change order. The type of units is based on the method of measuring units that you select in the **Estimate Measure** field.
Est. Amount	The total estimated amount of the cost code for the change order. The calculated amount is based on the total estimated units and the estimated amount per unit.
Estimate Measure	The default method of measuring the units that the change order is based on for the job is displayed, such as hours (HR) or items (EA), but you can select a different measure. The values that are available for this field are set up in Job Cost.

* Required field

10. Choose the **Save** icon.

Adding a Note to a Change Order

After the change order is synced, you can choose the **Notes** tab to view or enter information about each change order, as needed. On the **Notes** tab, choose the **New** icon to create a note. The job number and change order number are displayed. Enter a subject and description, and choose **Yes** in the **Internal Note** field if the note should be internal only.

Complete a Job Appointment

You can enter billable labor, travel, and other expenses when you complete work for an appointment. If the Job Appointment Summary report is set up, it is generated after you sync your device with the host system. This report is attached to the Job Cost Code and is automatically sent by email to the recipients who are designated in the MobileTech setup. Depending on your company's setup, you may need to Complete a Job Safety Analysis Inspection (page49) before you can complete the job appointment.

1. Choose **Appointments**.
2. At the top of the pane, choose the **Job Appointments** filter.
3. Select an appointment and choose **Complete**.

   > If you are in the appointment window, to complete the appointment, you can select the menu icon and then select **Complete**.

4. Enter information on these tabs for the job appointment, as needed:
   - **Resolution**
     i. In the **Internal Note** field, choose **Yes** if the information should appear only on internal reports and not on reports that are available to customers.
     ii. Enter a note in the **Resolution Note** field. When the job is completed, the note is created and saved together with your user ID and the date and time. When you sync with the host system, the new note information is added to the job appointment.
   - **Contacts** - Displays the location contacts.
   - **Time Entry** - For more information, see Enter a Labor Transaction Before Completing an Appointment (page37), Enter a Travel Transaction Before Completing an Appointment (page38), or Enter an Expense Transaction Before Completing an Appointment (page39).
   - **Inventory** - For more information, see Enter an Inventory Transaction Before Completing an Appointment (page40).

     > You can add the same item within the same job appointment but with a different cost code.

   - **PO Receipts** - For more information, see Receive Items from a Drop-Ship Purchase Order (page78).
   - **Summary** - For more information, see Complete the Summary Tab for a Job Appointment (page63).

     > The tabs that are available depend on the MobileTech setup. Some of the functionality that is described for these tabs might not be available for your organization.

5. Depending on how your system is set up, you might have the option to send the Appointment Summary report to appropriate personnel in the organization. You can search for a contact by entering the name, email address, or phone number. You can also add a contact by choosing the **Add** icon.

> - If the Job's Location is also a Service Location, if you add a new contact, the back office can add this to the service location contacts. See Create or Edit Location Contacts (page50) for more information.
> - If the Location is only a Job Location, you can only add the contact's email address to receive the Completion Report, and the email address is not synced.

6. When you finish adding or selecting email addresses, choose **Next** to complete the appointment.
7. Choose **Complete**.
8. After the appointment is completed, choose the **Sync** icon to update the host system with the completed appointment.

Complete the Summary Tab for a Job Appointment

The Summary tab displays the information that you have entered for this appointment. Depending on your setup, you may have additional sections that display. This information appears on the Call Summary and Job Appointment Summary report. Once you complete the appointment, you cannot enter additional information about this appointment. The Customer and Technician Signatures are entered at the bottom of this tab.

1. On the **Summary** tab, review the details that you entered for this appointment.

   > After the appointment is completed, you can't enter additional information about this appointment on your mobile client device.

   - Service Summary
     - Job Number
     - Completed - This can be edited on the Resolution tab.
     - Job Description
     - Technician
     - Resolution Note
   - Customer Location
     - Customer
     - Address information
   - Time Entries
   - Consumed Inventory
   - Purchase Order
2. Select the *Customer Signature* button to collect the customer's signature, if needed based on setup. Enter the required customer name at the top and have the customer sign their name. See Collecting signatures[6] below for more information.

   > Turn the device horizontally to increase the size of the signature field.

3. Select the *Technician Signature* button to add your signature, if needed based on setup.
4. After confirming the information, choose checkmark icon. Depending on the MobileTech setup, you might need to enter information on one or more of the appointment completion tabs.
   - If a "Missing required data" message is displayed, you must complete the required information before the appointment can be completed.
   - If a "Missing recommended data" message is displayed, you can enter the missing optional data, complete the appointment, or cancel.

6 https://wennsoft.atlassian.net/wiki/pages/resumedraft.action?draftId=6619674#CompletetheSummaryTabforaJobAppointment-collecting

5. When the confirmation message is displayed, choose **Complete Appointment**.
   The appointment is removed from your device. As part of the job appointment completion process and depending upon company settings, a Timesheet report may be generated and emailed to you.

Collecting signatures

Use the **Summary** tab to sign off on an appointment and capture the customer's signature when the work is complete. Depending on the MobileTech setup, the signature capture may be required before the appointment can be completed. The signature capture is an optional feature that is enabled in setup.

If you need to obtain signatures (Customer and/or Technician), scroll to the bottom of the Summary tab window and choose the appropriate button. If a signature is missing, the button displays as red. Once the signature is obtained, the button displays as green. If you need more space for a signature, turn your device horizontally to rotate the screen and the signature field will be full screen.

- **Customer Signature**
  Enter the customer's name or the name of the contact who represents the company. Enter the customer name, and then request that the customer sign in the box below the name.
- **Technician Signature**
  Your name displays for the technician name. Sign in the box below your name.

Equipment

- Choose **Customers**. Select a customer and choose the **Locations** tab. Select a location and choose the **Equipment** tab.
  OR
- Choose **Service Calls**. Select a service call, choose **More**, and then choose the **Equipment** tab.

To work with an existing record that is assigned to a location or service call, select the equipment record, and then use these tabs to view more information.

Tab	Description
	**Equipment** View equipment details. Equipment records for a customer location are displayed only if a service call is assigned to the customer location. If the equipment is a component, the master equipment ID is displayed in the list beneath the component equipment description. You can zoom to the master equipment record from the component equipment record. The master equipment record displays the number of associated components. Depending on the MobileTech setup, you may be able to edit an equipment record.
	**Contracts** View any contracts for the equipment that you are servicing. The contract type might affect the service that you provide.

Tab	Description
	Meter Readings View meter readings that are associated with the equipment record. You can also enter a meter reading (page71). A meter reading can be updated throughout the day, but you can sync only one meter reading per day.
	Refrigerant If your organization uses refrigerant tracking, you can use this tab to view refrigerant tracking information for equipment on a service call. This information is used to track leak rates and to report annual refrigerant usage to the Environmental Protection Agency (EPA). You can also create a refrigerant tracking record (page72) for equipment that is assigned to a service call.
	History View service history for the equipment. Request history (page69) to display the list of completed service calls. The number of records that are displayed is determined by an administrator during setup.
	Map If your device supports mapping and a valid latitude/longitude or location address is entered in Service Management, use this tab to see the mapped location of an appointment. View the location on a map. If the map does not show the correct location, you can update the GPS location using your device's GPS. For information, see Updating GPS coordinates (page13).
	Attachments You can add an attachment to the equipment. See Work with Service Call, Equipment, and Task Attachments (page24).
	Notes View any additional notes about the equipment. Depending on the setup, you might not be able to edit an existing note. You can also create an equipment note. For more information, see Create a Note (page52).
	Reports (page29) View any Inspection reports or Job Safety Analysis reports available for this entity. This icon displays based on your company's settings.

To create an equipment record for a location where you are performing a service call, choose the **New** icon. This icon might not be displayed if you don't have a service call at the selected location. For more information, see Create or Change an Equipment Record (page65).

Create or Change an Equipment Record

See these sections for more information:

- Create an equipment record (page66)
- Change an equipment record (page68)

Create an equipment record

Open the equipment list for a service call:

1. Choose **Service Calls**.
2. Select a service call, choose **More**.
3. Choose the **Equipment** tab.
4. Choose the **New** icon.
5. Enter information in these fields:

Field	Description
Location	The default location ID.
Component?	Choose the toggle if the Equipment is a component. When toggled to *Yes*, a **Master Equipment** field is displayed. Choose the **Click To Select** link to open an Equipment lookup display equipment assigned to that customer that are not components. Select the Master Equipment the new Component belongs to. (Master Equipment is a required field for saving the new equipment.) If you toggle the Component switch to No, the Master Equipment is cleared out and the field is hidden.
***Equipment**	Depending on the setup, you might not be able to enter a new equipment ID. If this field isn't available, an equipment ID is generated automatically after you sync with the host system.
Description	The description of the equipment.
Equipment Type	Select the equipment type.
Manufacturer	Select the manufacturer of the equipment.
Model Number	Enter the model number.

Field	Description
Serial Number	Enter the unique serial number for the equipment.
Barcode	If the equipment has a barcode, enter the barcode number.
Building ID	Defaults to the building ID assigned in the back office.
Building Room	Defaults to the building room assigned in the back office.
Sublocation	Depending on your setup, you may have a lookup button to open a selection window or you can enter the sublocation information.
Sublocation Description	The description defaults in from the Sublocation selected above. This field will not display if you don't have the Sublocation lookup.
Sublocation Barcode	The barcode defaults in from the Sublocation selected above. This field will not display if you don't have the Sublocation lookup.
Install Date	Select the date when the equipment was installed.
Install By	Select the person or company who installed the equipment.
Warranty Exp	Select the date when the warranty expires.
Ext Warranty Type	Select the extended warranty type.

Field	Description
Ext Warranty Exp	Select the date when the extended warranty expires.

* Required field

6. Choose the **Save** icon.

Change an equipment record

Depending on the setup, you can change these equipment details:

- Equipment Type
- Manufacturer
- Model Number
- Serial Number
- Barcode
- Install Date
- Install By
- Warranty Exp
- Ext Warranty Type
- Ext Warranty Exp

Assign/Unassign Equipment on a Service Call

Assigning Equipment to a Service Call

Your company settings may require you to manually assign a piece of equipment during appointment completion.

1. Choose **Service Calls**.
2. Select the service call, choose **More**.
3. Choose the **Equipment** tab. Equipment that is already assigned to the selected service call is displayed.
4. At the top of the pane, choose the **View Unassigned** filter to view equipment at the customer location, but not assigned to the service call. This filter lets you switch between assigned and unassigned equipment.
5. Select an equipment record and choose **Assign to Service Call**.

Unassigning Equipment from a Service Call

For equipment you have manually assigned to a service call, you can unassign the equipment provided you have not synchronized your device.

1. Choose **Service Calls**.
2. Select the service call, choose **More**.
3. Choose the **Equipment** tab. Equipment that is already assigned to the selected service call is displayed.
4. Choose the equipment and then choose **Unassign**.

> ⚠ If the Unassign option is not available for selection, your equipment has already been synchronized to the back office thus it will have to be removed from the service call in Service Management.

Request Service History for Equipment

You can request service history to view the most recent service calls for the equipment that you're working with.

1. Choose **Service Calls**.
2. Select a service call, choose **More**.
3. Choose the **Equipment** tab.
4. Select an equipment record.
5. Choose the **History** tab.
6. Choose **Request History**. A list of completed service calls is displayed for the current equipment record. The number of records that are displayed is determined by an administrator during setup.
7. Select a service call to view the completion date, call type, problem type, employee, resolution, and any notes associated with the service call.

Scan Barcodes

Depending on the setup, you can use barcodes in MobileTech to update and locate equipment and inventory information. Fields and lookups where you can scan a barcode are indicated by a barcode icon.

You can scan barcodes to complete these tasks:

- Scan and record a barcode for a new piece of equipment at a customer site.
- Associate a barcode with an existing piece of equipment if a barcode isn't already assigned to the equipment.
- Add an inventory item to the Inventory and PO Lines panes in MobileTech.
- Retrieve a task list that is associated with a piece of equipment.
- Locate a piece of equipment that is associated with a service call at a customer site.

You can scan a sublocation or equipment barcode at a customer site from the service call, appointment, equipment, or task lists on your mobile device.

> ⚠ Barcoding works with Android devices with back-facing cameras. If you attempt to scan a barcode with an Android device that only has a forward-facing camera, an error message displays "Unable to access back-facing camera."
> The Barcode icon is not available when a list is displayed in a completion form if Flexible Forms is set to True in Woodford. The Barcode icon is available in full panel mode, which you can access by double-tapping the section header.

For more information, see these sections:

- Scan a barcode (page70)
- Scan barcodes from lists (page70)
- Scan a barcode for a piece of equipment at a customer site (page70)
- Scan a barcode for a sublocation at a customer site (page71)
- Scan a barcode to update Service Management records (page71)
- Scan a barcode to update the Inventory pane (page71)
- Scan a barcode in the PO Lines pane (page71)

Scan a barcode

1. Go to the area where you want to scan a barcode, such as the Equipment pane. (From a service call, choose the **Equipment** tab and select an equipment record.)
2. Choose the barcode icon next to the **Barcode** field.
3. Start to scan when the camera opens.

Scan barcodes from lists

A barcode icon is displayed in the **search** field at the top of the service call, appointment, equipment, and task lists.

You can search by barcode from any of the lists to locate information about a piece of equipment or the location of the equipment. For example, you can scan the barcode for a piece of equipment to find information about the service call, task, or list of tasks that is associated with the equipment.

Scan a barcode for a piece of equipment at a customer site

Task	Information displayed
Scan a barcode from the service call or appointment list	If there is only one service call for the piece of equipment that you scanned, the task list that is associated with that piece of equipment opens. If there is more than one service call for the piece of equipment that you scanned, the service call or appointment list displays only the service calls or appointments that are associated with that piece of equipment.
Scan a barcode from the equipment list for a service call	If the piece of equipment that you scanned has tasks assigned to it, the task list that is associated with the piece of equipment opens.
Scan a barcode from the equipment list for a customer location	If the barcode doesn't match a piece of equipment on a service call, the Equipment pane opens. If the barcode matches equipment that is assigned to a service call on the device, go to the equipment list for the service call.
Scan a barcode from the task list	The task list is restricted to the piece of equipment that is associated with the equipment barcode.

Scan a barcode for a sublocation at a customer site

Task	Information displayed
Scan a barcode from the service call or appointment lists	If there is only one service call for the piece of equipment that you scanned, but there are multiple pieces of equipment that are assigned to the sublocation for the service call, go to the equipment list for the service call. If there is more than one service call that is assigned to the sublocation for the service call, the service call or appointment list displays the service calls or appointments that have equipment that is associated with the sublocation.
Scan a barcode from the equipment list	The equipment list is restricted to show the equipment that matches the sublocation that is scanned.
Scan a barcode from the task list	The task list is filtered to show only the tasks for the equipment that is associated with the sublocation.

Scan a barcode to update Service Management records

If you scan a barcode for a piece of equipment, the record is updated in Service Management if a barcode doesn't already exist for the equipment. You can't update a sublocation barcode from MobileTech.

Scan a barcode to update the Inventory pane

You can scan a barcode in the **Site Inventory** field of the Inventory pane to add an inventory item.

> Barcoding doesn't apply to non-inventory items.

Scan a barcode in the PO Lines pane

You can scan a barcode in the **Inventory** field of the PO Lines pane to add a site inventory item to a purchase order.

Enter a Meter Reading

1. Open the equipment list for a customer or a service call:
   - Choose **Customers**. Select a customer and choose the **Locations** tab. Select a location and choose the **Equipment** tab.
   - Choose **Service Calls**. Select a service call, choose **More**, and then choose the **Equipment** tab.
2. Choose the **Meter Readings** tab, and then choose the **New** icon.

   > After a meter reading is synced, you can update the meter reading throughout the current day. However, you can't change meter readings for previous days.

3. Enter information in the user-defined fields. For assistance with how to set up or enter information in these fields, contact your system administrator.

Field	Description
***Equipment**	The equipment ID.
***Reading Date**	By default, today's date is displayed and can't be changed. You can enter meter readings only for today.
Equipment Reading 1-5	Integer fields.
Equipment Reading 6-15	Numerical to two decimal places.
Equipment Reading 16-18	Use the date controls to select a date.
Equipment Reading 19-20	Currency fields.
Equipment Reading 21-25	Text fields that have a maximum of 30 characters.

*Required field

4. Choose the **Save** icon.

Create or Edit a Refrigerant Tracking Record

Depending on your company's settings, if the equipment is assigned a valid Refrigeration Equipment Type, and the equipment is assigned to at least one service call, you can create or edit a refrigerant tracking record:

1. Open the equipment list for a customer or a service call:
   - Choose **Customers**. Select a customer and choose the **Locations** tab. Select a location and choose the **Equipment** tab.
   - Choose **Service Calls**. Select a service call, choose **More**, and then choose the **Equipment** tab.
2. Select the equipment and then select **More**.
3. *Optional:* On the Equipment form, select the Refrigerant Equipment Type. When the Refrigerant Equipment Type field is not *0 - Not Applicable*, the following refrigerant fields display. Enter the following refrigerant information or you can continue to step 4 to open the Refrigerant form.

   > If these fields are not shown, the Refrigeration Equipment Type indicates no refrigerant is used for this equipment. To make these fields visible, you choose a Refrigeration Equipment Type other than 0 - Not Applicable.

   - **Optimal Charge**: Enter the optimal refrigerant charge (in pounds) necessary to maintain safe cooling levels. This is often a manufacturer's initial value. This information can also be entered in Service Management. For more information, see the Service Management documentation.
   - **Refrigerant Type**: Select the type of refrigerant that is being used. Depending on the equipment, this can be one of several primary types. See the National Refrigeration Safety Code catalog for more information. This information can also be entered in Service Management. For more information, see the Service Management documentation.

4. Choose the **Refrigerant** tab, and then choose the **New** icon. You can also select an existing refrigerant tracking record and change it.

> If the Refrigeration Equipment Type = *0 - Not Applicable*, the Refrigerant Tracking tab will not be displayed. To access Refrigerant Tracking for this equipment, change the Refrigeration Equipment Type to a value other than *0 - Not Applicable* and save changes.

5. Enter information in these fields, as necessary.

Field	Description
***Service Call**	The service call ID.
Equipment	The equipment ID.
Date of Service	The current date and time. You can use the date and time controls to select a new date and time for the record.
***EPA Certification**	The EPA certification number, which is required to work on refrigeration systems, as specified under Section 608 of the Clean Air Act. If a refrigerant certification number was entered for your technician setup record in Service Management, that number is the default value here.
***Refrigerant Type**	Select the type of refrigerant that is being used. Depending on the equipment, this can be one of several primary types. See the National Refrigeration Safety Code catalog for more information. This information can also be entered in Service Management. For more information, see the Service Management documentation.
Supplied By	Enter the company or individual that supplies refrigerant for the equipment.
Cylinder Number	Enter information about the refrigerant cylinder, such as the number of the cylinder and a short description.
Circuit Code	Choose the refrigerant circuit.
Leak Found	Choose **Yes** if a leak was found during the inspection. If you choose **Yes**, the **Leak Repaired**, **Repair Attempted**, **Leak Location**, and **Leak Sublocation** fields are available.
Leak Repaired	Choose **Yes** if the leak was repaired.

Field	Description
Repair Attempted	Choose **Yes** if a repair was attempted but not completed.
***Leak Location**	Select the general location of the leak.
Leak Sublocation	After you select a general leak location, select the specific sublocation of the leak. The values that are displayed depend on the selection in the **Leak Location** field.
Fault Code	Select the fault code that best describes the condition that was discovered, such as **Leaky Pipe** or **Corrosion**. Select **Other** if the condition doesn't adequately match one of the other values, and describe the condition in the **Comments** section.
Action Code	Select the action code that best describes the steps taken to alleviate or fix the problem.
Optimal Charge	Enter the optimal refrigerant charge (in pounds) that is necessary to maintain safe cooling levels. This is often a manufacturer's initial value. This information can also be entered in Service Management. For more information, see the Service Management documentation.
Ref. Equipment Type	Displays the refrigeration equipment type.
Max Leak Rate	Enter the maximum leak rate.
Current Leak Rate	Enter the current leak rate.
Current Leak Rate	Enter the current leak rate.
Recharged,RecoveredRecycledDisposedReleased	Enter the amount of old refrigerant that is recharged, recovered, recycled, disposed of, and accidentally released, as appropriate. The unit of measure is determined by the refrigerant type.

Field	Description
Added, Net Added	Enter the amount of new refrigerant that is added and the net amount of total refrigerant added. The unit of measure is determined by the refrigerant type.
Initial Leak Test	Select the code that best describes the testing process after the problem was alleviated or fixed.
Initial Test Date	Select the date of the first refrigerant test.
Follow-up Leak Test	Select the code that was used if a follow-up testing process was required.
Follow-up Test Date	Select the date of the follow-up test.
Comments	Enter any additional comments about the refrigerant. If you selected a fault code of **Other**, explain the fault here.
Confirmation	If a third-party agency was used to manage and verify refrigeration safety, enter the verification number here. This value isn't validated by the software.
Void	Choose **Yes** if you need to void this record after it has been saved. You can't delete records.

6. Choose the **Save** icon. Because the refrigerant tracking record doesn't have an ID until after you sync, it appears in the list as pending. The leak rate won't display until after you have synchronized with Signature as that is where the calculation is performed.
7. When you're ready to send the pending refrigerant tracking record to the host and complete the record creation process, choose the **Sync** icon.
8. After syncing with the host, the Refrigerant view updates to display the Leak Rate value and either a True or False regarding the Max Exceeded.

Note: If these fields are not shown, the Refrigeration Equipment Type indicates no refrigerant is used for this equipment. To make these fields visible, you should choose a Refrigeration Equipment Type other than 0 - Not Applicable and save changes.

Purchase Orders

You can create purchase orders on your mobile device for items that need to be purchased while on a service call. The purchase orders are sent to the host system to be processed in Service Management and in Purchasing. You can also receive items on drop-ship purchase orders while on a job appointment or service call.

> ⚠ You can create purchase orders only for service appointments, not for job appointments or technician activities. However, you can receive drop-ship purchase orders for job appointments and service call appointments.

You can sync purchase orders with the host system at any time. However, after a purchase order has been synced, you can't change it or delete it. For more information, see Create a Purchase Order (page76) and Change or Delete a Purchase Order Line (page78).

If you received purchase order items while on a job appointment or service call, you can mark those items as received. You can also receive partial shipments. For more information, see Receive Items from a Drop-Ship Purchase Order (page78).

Viewing Service Management purchase orders

Purchase orders that have been added to a service call in Service Management can be viewed on your mobile device. These purchase orders are read-only and cannot be edited. For more information, see View a Service Management Purchase Order (page79).

Create a Purchase Order

> ⚠ If your organization uses SOP invoicing in Signature Service Management, you can't create purchase orders. You must use service invoicing. Also, so that you can quickly work and provide information to customers in the field, purchase orders for service invoices and field invoices don't include taxes unless the invoices have been received in the Purchasing module of Microsoft Dynamics GP.

1. Choose **Appointments**. Select an appointment and choose **Complete**.
2. Choose the **PO Lines** tab, and then choose the **New** icon.
3. In the PO Lines pane, some of the fields might display information automatically, based on the MobileTech setup.
4. Enter information in these fields, as necessary.

Field	Description
***Service Call**	Service call information is displayed and can't be changed.
***PO Number**	The purchase order number. Depending on the setup options for generating purchase order numbers and purchase order prefixes, a purchase order number might be displayed, or you can enter a purchase order number.
***Date**	The date of the purchase. The default date is the current date, but you can change it.

Field	Description
Unknown Vendor	Mark this option if the item for the purchase order is from a vendor who isn't set up in Service Management. Enter the name of the vendor in the **Vendor Name** field. This field might not be displayed, depending on the setup.
***Vendor Name**	Select the vendor associated with the purchase order, if information about the vendor is set up in the host system. If the vendor isn't set up in the host system, mark **Unknown Vendor** and enter the name of the vendor. The default value is UnknownVendorID. If a vendor has been marked Inactive or On Hold in Signature, they will display in MobileTech.
Non-Inventory	Mark this option if this is a new item or an item that is associated with a new vendor that you entered.
***Inventory/Item Number**	The label that is displayed depends on the inventory setup options. Select an existing inventory item number or enter a new one. If the item is new, the item is created as a non-inventory item for the purchase order when you sync the purchase order.
Item Description	A description is displayed if you selected an existing inventory item. If this is a new item, you can enter a description.
Enter Site Name	Mark this option to enter a site that is not listed in the **Site** field.
***Site**	Select a site where the item should be assigned. If a site is designated as a default site in the setup and the technician is assigned to the site in Service Management, the default site is displayed, but you can change it. If a technician isn't assigned to the site designated as the default site in the setup, the field is blank. Only sites that the technician is assigned to in Service Management are available.
***U of M**	Select a unit of measure that best represents the typical item being purchased. If a default unit of measure is designated in the setup, the default unit of measure is displayed, but you can change it.
***Cost Code**	The cost code that pertains to the purchased item. A default cost code is displayed, but you can change it.
***Quantity**	The number of items being purchased, which must be 1 or greater.

Field	Description
***Unit Cost**	The cost of each item that is purchased. The default amount is displayed, but you can change it.
Extended Cost	This amount is calculated automatically, based on the cost and the quantity (Cost x Quantity = Extended Cost).

*Required field

5. Choose the **Save** icon. The purchase order appears in the list of purchase orders for the service appointment.

Change or Delete a Purchase Order Line

You can change purchase order lines and create additional purchase order lines after you save a purchase order, but before you sync it with the host system.

- To change a purchase order line, select the purchase order line and make changes, as needed. Choose the **Save** icon.
- To add lines to a purchase order, choose the **PO Line** tab, and then choose the **New** icon. Information is displayed in some fields based on the original purchase order. Enter information in the PO Lines pane, as needed, and then choose the **Save** icon.
- To remove a purchase order line that was created before it is sent to the host system, select the purchase order line and choose **Delete**.

You can't change or delete a purchase order or PO lines after a purchase order has been synced with the host system.

Receive Items from a Drop-Ship Purchase Order

After drop-ship purchase orders are committed for a job or service call, you can use the **PO Receipts** pane to receive items from purchase orders. You can also receive partial shipments.

1. Choose **Appointments**. Select an appointment and choose **Complete**.
2. Choose the **PO Receipts** tab to display the receipts that are processed and assigned to the appointment. (Processed receipts are not editable.)
3. To view all receipts available for the service call or job, but not assigned to the appointment or processed, choose the **Refresh** icon in the top right corner. These receipts will be available on your device until you sync the device.
4. Select an unprocessed purchase order receipt to open the PO Receipt pane. (An unprocessed receipt displays as Processed: No.)
5. Enter information in these fields, as necessary.

Field	Description
PO Number	The purchase order number for the job appointment. You can't change this value.
Vendor	The vendor that is associated with the appointment and purchase order. You can't change this value.

Field	Description
Processed	Displays Yes or No to indicate if you received items listed on the purchase order receipt.
Service Call	The appointment number associated with the purchase order. You can't change this value.
Transaction Date*	The date when the purchase order items were received. The current date is displayed by default, but you can change it.
Freight Amount	You can optionally enter the freight charges for items on the purchase order from the invoice.
Misc Amount	You can optionally enter the miscellaneous charges for items on the purchase order from the invoice.
Vendor Doc#*	Enter a number or identifier for the vendor document. For example, you could enter the number of the packing slip or other information that might be included with the shipment.

*Required field

6. Choose the **Receipt Detail** bar to display the **PO Receipts line detail** list, where the line items are displayed for the purchase order receipt.
    - To receive all items for all line items, choose **Receive All** to mark the **Received** checkbox for each line.
    - To receive items for only one line, select the line and toggle **Received** to *Yes*.
7. If the quantity of items that was delivered differs from the quantity that was originally on the purchase order, you can change the value in the **Quantity** field to reflect the number of items that were delivered. The number of delivered items can be less, the same, or more than is indicated on the purchase order.

    After the purchase order receipt is synced, you can't change the quantity. To process the remainder of the items, you must again choose the **PO Receipt** tab and choose the sync icon to view the purchase order and receive the remainder of the order.

8. Choose the **Save** icon.
9. On the next device sync, the receipt is sent to the back office.

View a Service Management Purchase Order

You can view purchase orders added to a service call in Service Management. Purchase orders created in Service Management cannot be updated and are read-only.

1. Choose **Appointments**. Select an appointment and choose **Complete**.
2. Choose the **PO Lines** tab, and then choose the purchase order to open the Purchase Order view pane.
3. Choose **More** to display additional purchase order information.

Time Entry

You can create time entries for unbilled labor hours, expenses, and travel for the current or previous work week. Billable service call costs that are incurred during a service call or job appointment are entered when the appointment is completed. All time entries that you create on this device appear in the Time Entries pane after they're saved. Entries that are created on a different device don't appear in this pane.

Depending on the setup, you may see total hours displayed in the header.

- The Time Entry view header displays the following, depending on the drop-down choice:
  - Total Hours for the Current week
  - Total Hours for the Previous week
- The Time Entry pane header from Appointment Complete displays the Total Appointment Hours.

> ⚠ The hours displayed only shows time entered on the device.

Create Time Entries for Unbilled Labor

1. Choose **Time Entries**. Choose the menu icon, and then choose **Add Unbilled Entry**.
2. Select an entry type and enter information in the appropriate fields.

Field	Setting
Employee	Your employee ID. Depending on the MobileTech setup, you might be able select a helper technician if you're entering hours for someone else.
Date	The system date is the default date for this transaction. You can select a different date within the Previous Week or Current Week.
***Pay Code**	Select the pay code to use for the time entry. Depending on the setup, an unbilled hourly pay code might be displayed by default. You can change this value.
***Hours**	Enter the number of hours for this transaction.
Description	If necessary, enter a description of the labor that was performed.

*Required field

3. Choose **Save**.

4. If you are required to submit your time entry to your manager for approval, choose the menu icon, and then choose *Submit for Approval*. Depending on your setup, an email is sent to your manager when your time entries are submitted.
   Submit for Approval only displays if you've selected the Previous Week or Current Week from the Time Entries drop-down and if Manager Approval is required.
5. Choose the **Sync** icon. After the entry is sent to the host system, the fields can't be changed.

Create Time Entries for Unbilled Travel

In the current release, extended pricing isn't supported for expense and travel transactions through time entry.

1. Choose **Time Entries**. Choose the menu icon, and then choose **Add Unbilled Entry**.
2. Select **Unbilled Travel** and enter information in the appropriate fields.

Field	Setting
Employee	Your employee ID. Depending on the MobileTech setup, you might be able to select a helper technician if you're entering hours for someone else.
Date	The system date is the default date for this transaction. You can select a different date within the Previous Week or Current Week.
***Pay Code**	Select the pay code to use for the time entry. Depending on the setup, an unbilled hourly pay code might be displayed by default. You can change this value.
***Units**	Enter the units of travel for this entry.
Description	If necessary, enter a description of the travel.

*Required field

3. Choose **Save**.
4. If you are required to submit your time entry to your manager for approval, choose the menu icon, and then choose *Submit for Approval*. Depending on your setup, an email is sent to your manager when your time entries are submitted.
   Submit for Approval only displays if you've selected the Previous Week or Current Week from the Time Entries drop-down and if Manager Approval is required.
5. Choose the **Sync** icon. After the entry is sent to the host system, the fields can't be changed.

Create Timesheet Entries for Unbilled Expenses

In the current release, extended pricing isn't supported for expense and travel transactions through time entry.

1. Choose **Time Entries**. Choose the menu icon, and then choose **Add Unbilled Entry**.
2. Select **Unbilled Expense** and enter information in the appropriate fields.

Field	Setting
Employee	Your employee ID. Depending on the MobileTech setup, you might be able to select a helper technician if you're entering hours for someone else.
Date	The system date is the default date for this transaction. You can select a different date within the Previous Week or Current Week.
***Pay Code**	Select the pay code to use for the time entry. Depending on the setup, an unbilled hourly pay code might be displayed by default. You can change this value.
***Cost**	Enter the cost per unit.
***Quantity**	Enter the quantity.
Description	If necessary, enter a description of the travel.

*Required field

3. Choose **Save**.
4. If you are required to submit your time entry to your manager for approval, choose the menu icon, and then choose *Submit for Approval*. Depending on your setup, an email is sent to your manager when your time entries are submitted.

> Submit for Approval only displays if you've selected the Previous Week or Current Week from the Time Entries drop-down and if Manager Approval is required.

5. Choose the **Sync** icon. After the entry is sent to the host system, the fields can't be changed.

Save Time Entries and Generate the Employee Time Sheet Report

When you sync the data, the time entries are sent to TimeTrack. When you save the timesheet, you can generate the Employee Time Sheet report.

You can generate the report for all technicians who are displayed, or you can select which employee or employees to include on the report.

When viewing the timesheet that includes additional employees, the total hours displayed are the current technician's labor hours only. For example, if Alan is running the timesheet report for himself, Alice, and Nick, the total hours are only Alan's labor hours.

The report is generated for the time frame of the view:

- Previous work week
- Current work week
- All (reports are generated for both weeks)

Reports are sent to your email address, as specified in the setup.

1. Choose **Time Entries**. Choose the menu icon, and then choose **Run Report** For All or **Run Report for Employee(s)**.
2. If you select **Run Report for Employee(s)**, the Employee page is displayed. Select the employee whose time you want to include.
3. The Timesheet Signature pane opens. Sign and choose the **Save** icon. A message indicates that the report will be available the next time that you sync.
4. Choose the **Sync** icon. The host system is updated with the timesheet information, and the Employee Time Sheet report is generated.

Submitting Time Entries for Manager Approval

If you are required to submit time entries for your manager to approve, follow these steps.

1. Choose **Time Entries**.
2. Select either the **Previous Week** or **Current Week** from the Time Entries drop-down.
3. Select the menu icon, and then choose *Submit for Approval*. Depending on your setup, an email is sent to your manager when your time entries are submitted.
4. Choose the **Sync** icon. After the entries are sent to the host system, the fields can't be changed.

Updating Rejected Time Entries

If your manager rejects any submitted time entries, a notification count on the Time Entry icon displays. The number displayed indicates the count of rejected transactions for the Previous and Current Weeks combined. The number updates as you correct and resubmit time entries. Additionally, the Time Entries list displays a warning icon next to the time entry to indicate the rejection status. The status row on the time entry displayed in the Time Entry list also displays "Rejected" along with the manager's comment.

The Rejected icon does not display if you are accessing the Time Entries list from Appointment Completion.

1. Choose **Time Entries**.
2. Select the Time Entry.
3. Edit the transactions.
4. Choose *Save*.
5. Choose the menu icon, and then choose *Submit for Approval*. Depending on your setup, an email is sent to your manager when your time entries are submitted.
6. Choose the **Sync** icon. After the entry is sent to the host system, the fields can't be changed.

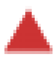
BOB Dashboard and Tabs

The BOB dashboard and tabs display the Health Monitor information from Building Optimization Broker. The BOB dashboard and tabs display depending on your company's settings. You have the option to add the equipment to the current service call (from the appointment and service call forms) or to create a new service call (from the equipment form). See Create a Service Call or Request from BOB Dashboard or Tab (page28).

BOB Fault Statuses

If the entity has more than one Priority status, only the highest level will display on the BOB dashboard. For example, if the Customer has 1 High Priority Fault status and 1 Low Priority Fault status, only the High Priority icon will display. On the BOB tab from an entity form, multiple level icons display with a numeric value indicating how many alerts for that level exist.

The health status will be one of the following colors:

Icon	Description
	**Red**: High priority fault currently Active.
	**Orange**: Medium priority fault currently Active.
	**Yellow**: Low priority fault currently Active.
	**Gray**: Entities that have: • Sensors with a currently Active BAS Agent in the Connected State but no active Faults. • No Sensors with a currently Active BAS Agent in the Connected State. • The Entity is not created or mapped in Building Optimization Broker.

BOB Dashboard

From the **BOB** dashboard, you can:

- View the highest fault priority alerts for all customers on the device.
- Zoom to view the highest fault priority alerts for customer locations.
- Zoom to view the highest fault priority alert for equipment at a customer location. If you select the equipment and then select **More**, you will be able to see all fault priority alert level icons with a numeric indicator for the number of alerts of that status level.
- Scan a barcode to quickly display that equipment and fault priority.
- Select the High, Medium, or Low filters at the top of the form to view all entities with that status display below. Only the highest fault priority alert level will filter.
- If multiple fault alert levels exist, only the highest level icon displays.
- Create a new service call by selecting a piece of equipment and then selecting **Create New Service Call**. If there are more than one status, select the status information to be added to the **Service Call Description**. See Create a Service Call or Request from BOB Dashboard or Tab (page28).

BOB tab accessed from an entity form

From the **BOB** tab on an entity form, you can:

- View the entity's priority fault status(es).
  - A numeric value displays in the center of each status icon.
  - If multiple Priority Fault levels are present for an entity, the color icons will stack, each with a numeric value to indicate the number of faults for that status.
- Scan a barcode to quickly display that equipment and fault priority.
- Select the High, Medium, or Low filters at the top of the form to view all entities with that status display below.
- Create a new service call by selecting a piece of equipment and then selecting **Create New Service Call**. If there is more than one status, select the status information to be added to the **Service Call Description**. See Create a Service Call or Request from BOB Dashboard or Tab (page28).

You can access the BOB tab on the following forms:

- **Appointment**
  The equipment options are to **Assign to Service Call** (if not already assigned), **Unassign** (if assigned and not yet synced), and **More** to open the Equipment form. If the equipment is already assigned and the device has been synced, the Equipment form automatically opens without showing additional actions.
- **Service Call**
  The equipment options are to **Assign to Service Call** (if not already assigned), **Unassign** (if assigned and not yet synced), and **More** to open the Equipment form. If the equipment is already assigned and the device has been synced, the Equipment form automatically opens without showing additional actions.
- **Equipment**
  You can create a new service call by selecting the equipment and then **Create Service Call**. If there is more than one status, select the status information to be added to the **Service Call Description**.
- **Customer**
  Select the equipment to open the Equipment form.
- **Location**
  Select the equipment to open the Equipment form.

Contact Information

Support & Sales

Support Phone: 262-317-3800
Email: support@wennsoft.com
Hours: Normal support hours are 7:00 a.m. to 6:00 p.m. Central Time. After-hours and weekend support is available for an additional charge. Please contact WennSoft Support for more information.

WennSoft will be closed in observance of the following holidays: New Year's Day, Presidents' Day, Memorial Day, Juneteenth, Independence Day, Labor Day, Veterans' Day, Thanksgiving Day, the Day after Thanksgiving, Christmas Day, and the Day after Christmas.

Support Plans
We're committed to providing the service you need to solve your problems and help your team maximize productivity.

We offer several Signature Enhancement and Support Plans to meet your needs and Extended Support Plans for retired product versions available at https://www.wennsoft.com/wsportal.

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