ServiceCEO MobileTech

# Table Of Contents

MobileTech Overview

ServiceCEO's Mobile Tech module lets your service staff log into and communicate with ServiceCEO with just about any mobile device. The ease and simplicity of entering data into ServiceCEO in real-time can be extremely useful. For example, employees can update their job status throughout the day from the road, enabling office staff to keep an accurate tab on the service staff and the status of the day's jobs. Employees can also update the job to reflect the products or services that they use to complete the job, so you can keep a tighter track of your inventory.

ServiceCEO Mobile Tech Access works with just about any mobile device using most major wireless network providers like Verizon, Sprint, and Cingular. For more on what mobile devices work with ServiceCEO, see the MobileTech Solutions page of insightdirect.com.

Other actions service staff can perform from their mobile device are:

- View a list of all of their jobs for the day

- View all of the details for every job to which they are assigned

- Change any of the job details to reflect the actions that were actually performed

- Add/Edit job charges, payments, and invoice notes

- View work orders and invoices

- Search for customers and add new jobs

- Assign inventory to jobs, selecting the individual item that is actually being used

- Access a list of all equipment items at the customer site, and view the history of each item

- Add or remove a Service Contract to a job

When configured, your MobileTech network will look something like this:
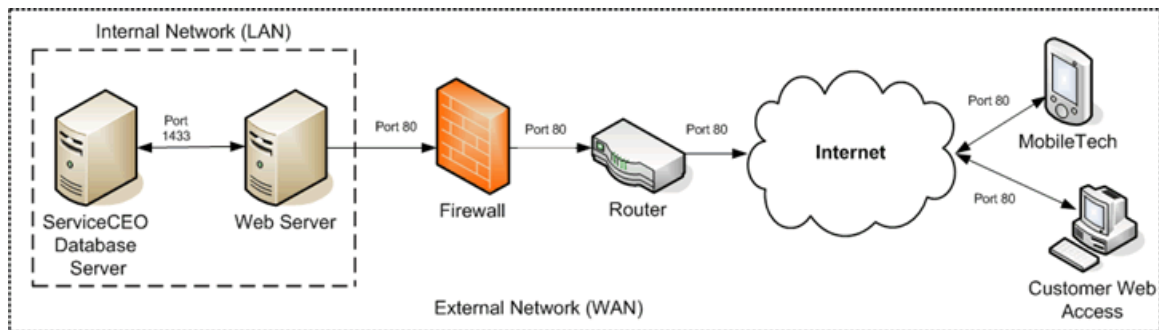
Installing MobileTech

MobileTech Requirements

The MobileTech Web Access feature is not included in regular ServiceCEO licensing. You must first acquire Mobile Tech Licenses for each remote user. If you have not already done so, you should contact your Account Executive to purchase these licenses.

For a complete listing of compatible handheld devices, please visit http://www.insightdirect.com/products-access.

MobileTech

To test your particular device to see if it is compatible with MobileTech, point your browser to http://www.insightdirect.com/mobile-device-test. In addition, you can contact your account representative for details about testing your specific wireless device.

To provide your employees mobile access to ServiceCEO, you must be running ServiceCEO on one of the following operating systems:

- Windows® 2000 Server

- Windows 2003 Server

- Windows XP Pro. While you can use Windows XP Professional as your web server, that operating system runs IIS 5.1, which, by default, only supports 10 concurrent inbound connections. For many companies, these are not enough connections to support everyone who needs to access ServiceCEO. You can, if you wish, increase IIS' connections limit to 40, the hard coded maximum number of connections (see the Troubleshooting section for details).
  If you want to support more then 40 concurrent users, you will need to use either Windows Server 2000 or Windows Server 2003.

You must also run two programs in order to enable MobileTech access:

- **IIS.** You must be running IIS 5.0 or greater.

- **.NET.** You must be running .NET 1.1. .NET is the framework that powers MobileTech.

You will also need to have a publicly accessible machine to which your mobile users will connect. The machine must have a high-speed Internet connection (DSL, cable modem, etc.) with a static IP address in order to identify it on the Internet. If you do not have a static IP address, you can use a dynamic DNS provider (like www.tzo.com) to identify your machine on the Internet using a domain name (www.yahoo.com is an example of a domain name).

You may also want to check to see if your ISP blocks port 80 access on your Internet connection. If so, you should change the port number that your web server uses to respond to client requests from 80 to another, non-blocked number.

If you have any questions, please attend one of our Instructional free training classes (provided that you have a valid membership).

Caution:
There are significant security risks associated with placing any web-server on a public network such as the Internet. This document does NOT cover the basics of secure server administration, including:

- File and directory security

- Firewall configuration and maintenance

- Regular server maintenance

- Regular security patch installation

It assumes a fair degree of knowledge about general networking and web-server administration, and is meant only to provide supplemental information on the setup of the ServiceCEO MobileTech module on top of an existing server foundation. If you are unsure of how to proceed, please contact your local network professional. They will be able to ensure that access is properly setup and your systems are not at risk.

Installing MobileTech

Installing MobileTech involves several steps. The first step is to run the installer. To do so:

1. Download the installer.

2. Double-click the installer to start it. The Welcome page appears:

3. Click **Next**. The License Agreement page appears.
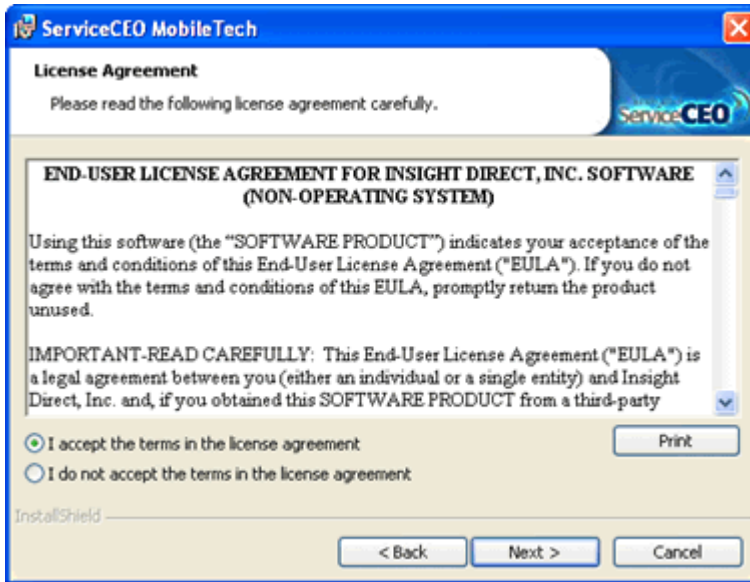
4. Select the **I accept the terms in the license agreement** option button.

5. Click **Next**. The Ready to Install the Program page appears.
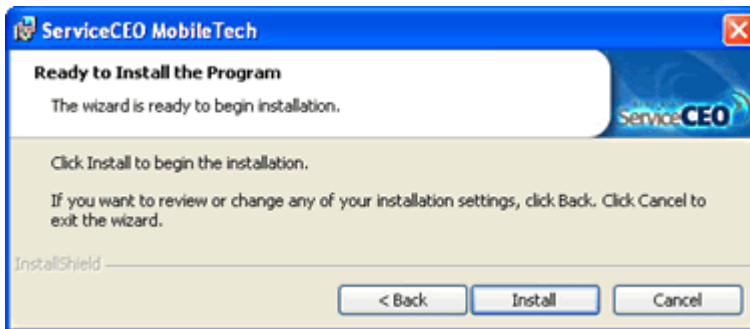
6. Click **Next**. The wizard will install the MobileTech files. When all of the files have been installed, the Complete page appears.

7. Click **Close**. The installation is finished.

The MobileTech files will be installed in C:\Inetpub\wwwroot\MobileTech.

Editing web.config

To ensure that the Mobile Tech Access can contact your database server, you will need to edit the web.config file.

1. Open the web.config file (located in the C:\Inetpub\wwwroot\MobileTech directory) in Notepad. To open the file in notepad, right-click the web.config file and select **Open With...**. An Open With dialog box appears. Select **Notepad** from the file list and click **OK**. Alternatively, to open Notepad itself, select **Start > Programs > Accessories > Notepad**.

2. Change "localhost" in the <add key="CoreDBServer" value="localhost" /> line to reflect the name OR IP address of your server that hosts the ServiceCEO database.
For example: <add key="CoreDBServer" value="FILESERVER" />

3. Verify that the <add key="CoreDBName" value="ServiceCEO" /> line appears exactly as displayed.

4. If you are using a device that uses a WAP browser to access the Internet, you will not be able to enter decimal points correctly due to a WAP limitation with ServiceCEO. Thus, you need to make the following changes in the web.config file:

   o Change the value of both the UseDecimalForQuantity and UseDecimalForCurrency fields from "true" to "false".

   o Enter the amount of spaces you want the device to read as the decimal value in the value section of the UseQuantity line. For example, if you use value="2", the browser will read "98234523" as "982345.23". If you use value="4", the browser will read "98234523" as "9823.4523"

5. Save your changes.

Configuring Employees for MobileTech

To setup up MobileTech access for an employee:

1. Open ServiceCEO as an administrator.

2. Click **Employees** from the Navigator bar.

3. Open the record for the employee that you want to give remote access.

4. Click the **Details** tab.

5. Click **Configure** in the Web Access field. The Web/Mobile Access Setup page appears.

6. Select the **Enable Access** check box.

7. Type a user name for the employee in the Login field.

8. Type a password for the employee in the Password field.

> *Caution:*
> Make sure you assign the mobile user a different user name and password combination then the one they use to login to the full installation of ServiceCEO. If the mobile login and the regular login are identical, the Mobile Tech will not be able to log in to ServiceCEO on their remote device.

9. Select the **Allow access to Work Orders and Route Sheets for Jobs to which this Employee is assigned** check box, if applicable.

10. Select the **Allow access to Work Orders and Route Sheets for Jobs serviced by any Route to which this Employee is assigned for the entire day** check box, if applicable.

    Note that the check boxes in steps 9 and 10 are NOT mutually exclusive - both can be active at the same time.

11. Select the check box corresponding to any user groups you would like the employee to access.

12. Click **OK**.

13. Click **Save and Close**.

Testing the MobileTech Connection

To test the Mobile Tech web access connection:

1. Open IIS. Select **Start > Programs > Administrative Tools > Internet Information Services**. The Internet Information Services dialog box appears.

   Note:
   This path may vary based on your operating system. If the prior instructions are not accurate for your computer, please consult your operating system's documentation on how to access the IIS management console.
   One possible alternative path is to open the Control Panel, double-click Administrative Tools, then double-click Internet Information Services.

2. Navigate to your MobileTech folder. You should find it in the Internet Information Services/(name of your computer)/Web Sites/Default Web Site directory.

3. Right-click the MobileTech folder and select **Browse** from the pop-up menu. The following window should appear, indicating that Mobile Tech access is functioning properly.
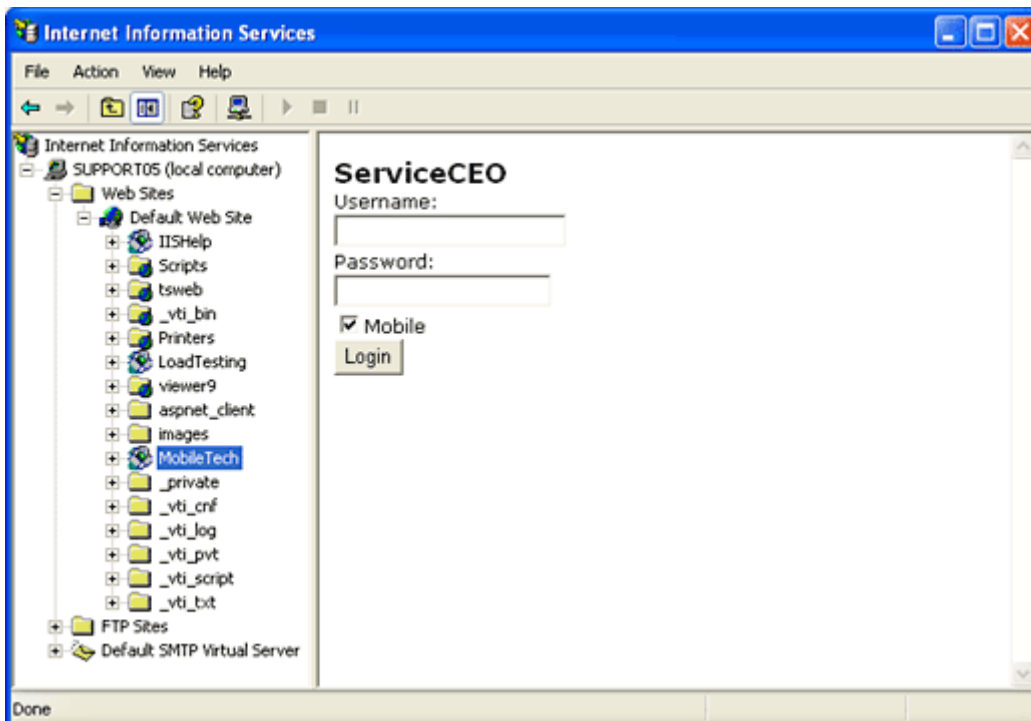
If the access works correctly, you're all done! To access ServiceCEO using a mobile device over the Internet, point your mobile device's browser to the web address you configured.

Troubleshooting the MobileTech Setup

Configuring XP Professional for 40 concurrent users

Windows® XP Professional runs IIS 5.1, which, by default, only supports 10 connections. For many companies, this is not enough connections to support all of your users. The steps below enable you to increase IIS' connections limit to 40, which Windows has hardcoded as the maximum number of connections. If you want to support more then 40 concurrent users, you will need to use one of the Server operating systems.

To Increase the Connection Limit of IIS 5.1:

1. Select **Start > Run**. The Run dialog box appears.

2. Type **cmd** into the Open field.

3. Click **OK**. A command prompt window appears.

4. Type "**cd \inetpub\adminscripts**" at the prompt. This will connect you to the adminscripts folder.

5. Type "**cscript adsutil.vbs set w3svc/MaxConnections 40**" at the prompt. This will run a script that sets the MaxConnections value in the IIS database to 40 (the maximum allowed).

6. Type "**iisreset**" at the prompt. This command shuts down and starts IIS so that the new settings will take effect.

Upgrading MobileTech

MobileTech needs to be running the same version as the ServiceCEO Client. Thus, whenever you upgrade the client, you will need to upgrade MobileTech as well.

To upgrade your MobileTech installation:

1. Run the MobileTech installation file. A dialog box appears, asking you if you are sure you want to upgrade your MobileTech files.

2. Click **Yes**. The InstallShield Wizard appears.

3. Click **Next**. The upgrade will begin. When it is complete, a Finish page appears.

4. Click **Finish**. MobileTech is upgraded!

Using MobileTech

Using MobileTech Overview

ServiceCEO lets service technicians in the field login to ServiceCEO's MobileTech module with their mobile devices. For more on what devices are supported, please read the MobileTech Solutions page of insightdirect.com.

Depending on the type of device that you use, there may be some differences in functionality. There two basic types of mobile devices:

-   **HTML.** Devices that use HTML browsers.

-   **WAP.** Devices that use WAP browsers.

In all of the MobileTech sections, we will be using a BlackBerry device as our sample device, but the basic functionality described in this document is valid for any user connecting to ServiceCEO with a mobile device.

Note that some minor differences may arise due to browser differences and device capabilities. For example, due to a WAP limitation, decimal points do not appear correctly in Openwave browsers accessing ServiceCEO. The workaround for this is described in the Editing web.config section of the Mobile Tech Setup Guide.

Caution:
Not all changes made in MobileTech will not be immediately visible in ServiceCEO. The exception is the Completion Wizard; all MobileTech edits will appear when you complete a job.

From many screens, you can perform three actions by selecting the following links from the top of the page:

- **Back.** Select the Back link to display the screen that was previously displayed.

- **The Job Status screen.** Select the Jobs link to display the Job List screen.

- **The Summary screen.** Select the Summary link to display the Invoice/Summary screen.

Caution:
Depending on your internet connection, any action may take a few seconds to take effect after click a button. Be very careful that you do not click a button multiple times, as your browser may create duplicate records. For example, if you click Add Job, and then click it again while your browser is adding the Add Job Screen, two new jobs may be added.

Logging into MobileTech
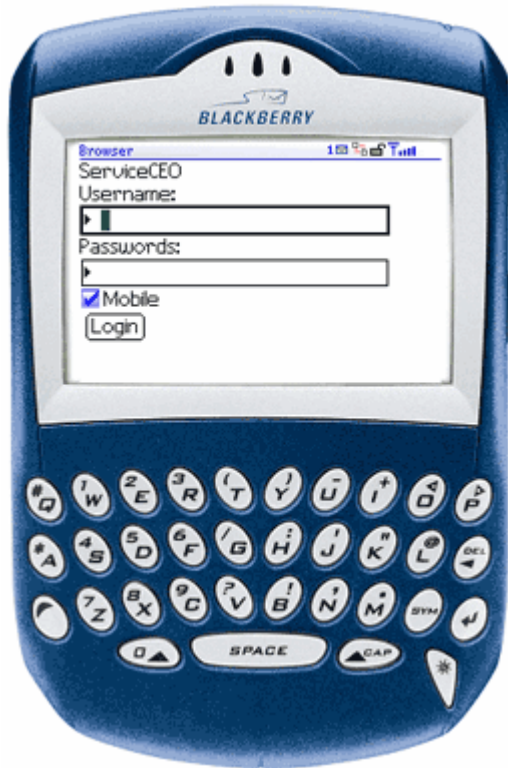
To log into MobileTech on a mobile device:

1. Point your mobile device to the URL you set up when you configured the MobileTech Setup. The Login page appears.

2. Type your user name into the Username field.

3. Type your password into the Passwords field.

4. Verify that the Mobile check box is selected.

5. Scroll down to and select the Login button.

6. Press **Enter**. The ServiceCEO Job List page appears.

The MobileTech Job List

The ServiceCEO Job List page displays all of the jobs scheduled for today for the technician logged into MobileTech. If you are logged in as the administrator, you can view everyone's jobs.

To display the details about a specific job:

1. Scroll down to the button displaying the invoice number that corresponds to the job you want to access.

2. Press **Enter**. The Job screen appears.

To add a new job, scroll down to the **Add Job** button and press **Enter**. The Add Job screen appears.

To open your Time Card screen, scroll down to the **Time Card** button and press **Enter**.

To view all of your scheduled jobs (not just those scheduled for today):

1. Scroll down to the **Show All** check box.

2. Select the check box.

3. Scroll to the **Go** button and press **Enter**. All of your jobs are displayed on the job list.

The MobileTech Job screen

This screen enables you to define the job's substatus. The substatuses that are available are defined by the ServiceCEO administrator; see the Defining Job Statuses section for details.

To define the job's substatus:

1. Scroll down to the job status drop-down list.

2. Select the option button corresponding with the job substatus you want to define.

3. Scroll to the **Save** button and press **Enter**.

You can also access additional pages from the bottom of this screen. They are:

- **Employees.** Selecting this button displays the Payroll Employees screen.
- **Charges.** Selecting this button displays the Charges screen.
- **Payments.** Selecting this button displays the Payments screen.
- **Invoice Notes.** Selecting this button displays the Invoice Notes screen.
- **Equipment.** Selecting this button displays the Equipment List screen.
- **Service Contracts.** Selecting this button displays the Service Contracts List screen.
- **Add Jobs.** Selecting this button displays the Add Job screen.

To display any of these screens, scroll to the appropriate link and press **Enter**.

You can also open your Time Card screen by clicking the **Time Card** link. Similarly, you can open the job's Work Order screen by clicking the **WO** link. Note that on devices using WAP, the link to the Work Order page will not appear. The Work Order link will only appear on HTML handheld devices.

> **Caution:**
> If one of these links does not appear, you may not have the appropriate security rights to access that area of ServiceCEO.

The MobileTech Add Job screen

This screen enables you to add a new job into ServiceCEO.

> **Caution:**
> If no customer appears to the right of the Selected Customer field, you need to search for and select the customer for whom you want to add a job. Scroll down to the **Search** button and press Enter. The Customer Search screen appears.

To enter a new job:

1. Scroll down to the Job Description field and type a brief description of the job.

2. Scroll down to the Start Date fields. There are two methods of entering a date:

Method One	Method Two
1. Scroll down to the **Start Date** button and press **Enter**. A Calendar link appears. 2. Scroll down to the **Calendar** link and press **Enter**. The Select an options screen appears. Your options are: 3. **Today's date.** if you want to use today's date, scroll down to it and press **Enter**. 4. **Type a date.** if you want to manually type a date, scroll to this option and press **Enter**. The Type a date screen appears. Type the date you want to enter in the field in the mmddyyyy format (i.e., 08312004 for August 31st, 2004). When complete, scroll down to the **OK** button and press **Enter**. 5. **Choose a date.** If you want to select a date from a list, scroll to this option and press **Enter**. The Choose a month screen appears. Scroll down to the month you want to use and press **Enter**. The Choose a week page appears. Scroll down to the week you want to use and press **Enter**. The Choose a date screen appears. Scroll down to the day you want to use and press **Enter**.	1. Scroll down to the **Month** drop-down list. 2. Select the month you want to use from the drop-down list. 3. Scroll down to the **Day** drop-down list. 4. Select the day you want to use from the drop-down list. 5. Scroll down to the **Year** drop-down list. 6. Select the year you want to use from the drop-down list.

3. Scroll down to the **Hour** drop-down list.

4. Select the hour you want to use from the drop-down list.

5. Scroll down to the **Minute** drop-down list.

6. Select the minute you want to use from the drop-down list.

7. Scroll down to the **AM/PM** drop-down list.

8. Select either AM or PM from the drop-down list.

9. Scroll down to the **Expected Duration** field and type the number of hours you expect the job to take.

10. Scroll down to the **Add** button and press **Enter**. The job is now added to ServiceCEO.

> *Caution:*
> One limitation of the Add Job function is that users (non-administrators) can add a job but they can not assign it to themselves, meaning that it will not appear on their Job List nor will they be able to add a Time Card entry for themselves. Currently, the only people who can add a job and assign employees in MobileTech is the administrator. A workaround is to have someone at the office using the ServiceCEO client create the job for the MobileTech user.

The MobileTech Customer Search screen

This screen enables you to search for the customer for whom you want to add a new job.

To do so:

1. Scroll down to the **Find Customer by Name** field and type all or part of the customer name for whom you want to add a job.

2. Scroll down to the **Location Name** field and type all or part of the location name for the customer for whom you want to add a job.

3. Scroll down to the **Phone Number** field and type all or part of the phone number for the customer for whom you want to add a job.

> **_Tip:_**
> You can search by using the Find Customer by Name field by itself, the Location Name field by itself, the Phone Number field by itself, or by using a combination of two or all three fields at the same time.

> **_Tip:_**
> MobileTech assumes what you type is the customers _first_ name.
> If you want to search for the customer's last name, type your search criteria followed by a comma. For example, to return Kim Gordon, type "gor," and click **Search**.
> To search by both first and last name, type the last name search criteria followed by a comma, a space, and your first name criteria.

4. Scroll down to the **Find** button.

5. Press **Enter**. A list of customers appears.

6. Scroll down to the customer for whom you want to add a job and press **Enter**. The customer's name appears next to the Selected Customer field.

7. Create the job in the same manner as on the Add Job screen.

## _The MobileTech Invoice/Summary screen_

This screen displays all of the details about the job. Scroll down to see the rest of the details of the job.

From this screen, you can also access four different screens, each designed to display specific data about the job:

- **Charges.** Scroll down to a specific charge and press **Enter**. The Charges screen appears, displaying details about the charge.

- **Services.** Scroll down to the specific service and press **Enter**. The Product/Service Detail screen appears, displaying details about the service.

- **Payments.** Scroll down to the specific payment and press **Enter**. The Payments screen appears, displaying details about the payment.

- **Invoice Notes.** Scroll down to the Invoice Notes link and press **Enter**. The Invoice Notes screen appears, displaying any notes.

The MobileTech Work Order
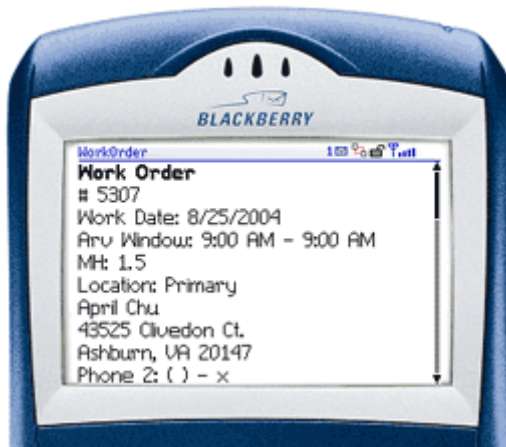
This screen displays the job's work order. You will need to scroll down to view the work order's details, including the job's products and services, charges, and any related notes.
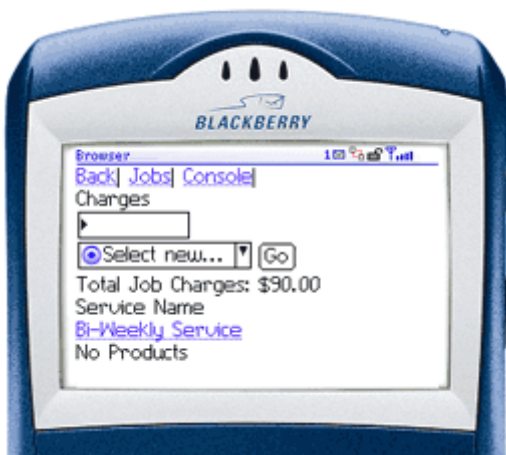
You can call the listed phone numbers by selecting the phone number you want to call and press **Enter**.

Note:
Note that on devices using WAP, the link to the Work Order page will not appear. The Work Order link will only appear on HTML mobile devices.

The MobileTech Charges Screen

The Charges page displays the current charges for the job.

To display details about the product or service, highlight the product or service and press **Enter**. The Edit Service Detail Screen appears.

To add a new product or service, select either Product or Service from the drop-down list and click **Go**. The Charge Search Results screen appears.

## The Charge Search Results screen

This screen displays the results of your search for a charge (a product or service). From here, you can perform several actions:

Click the name of the product or service to add it to the job. The Edit Product/Service Detail screen appears.

Click the appropriate more link to learn more about the product/service before you add it to the job. The Product/Service Detail screen appears.

Click **Cancel** to select none of the products or services. The Charges screen appears.

The MobileTech Product/Service Detail Screen
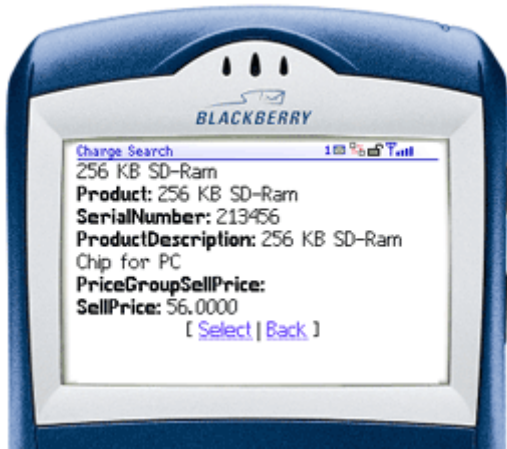
This page displays details about the selected Product or Service.

Click **Select** to add the product or service to the job. Depending on if you selected a product or service, a different page appears:

- **Products.** The Add Product Detail screen appears.

- **Services.** The Add Service Detail screen appears.

Click **Back** to return to the Charge Search Results screen.

The MobileTech Edit Product/Service Detail Screen

This page enables you to define specific details about the product or service. Note that when you see this page, the service or product has already been added to the job.

From this screen, you can edit:

- **The Charge Type.** Select the type of charge from the drop-down list.

- **Quantity.** Type the amount of units of the product or service being used or performed.

- **Charge.** Type the amount of the charge.

- **The Charge Description.** Edit the description in the large text box.

- **Service Contract.** If a service contract is added, the service contract section will appear as described in the Service Contract topics. If no service contract is attached, click **Select** to attach one. The Service Contracts List screen appears.

When done, scroll down and select the **Save and Close** or the **Save** button. Press **Enter** to save your edits. The Charges screen appears, displaying the charge you just added.

The MobileTech Payments Screen

This page displays the job's payments, along with the customer's current balance for both the job and account as a whole (taking all jobs into account).

To add a payment to the job, select the payment type from the Payments drop-down list and click **Add**. The Payments Detail screen appears.

To view the details of an existing payment, select the existing payment type. The Payments Detail screen appears with the payment information populated.

The MobileTech Payment Detail Screen

This screen enables you to define or edit a payment for the job.

Depending on what value you select from the Payment method drop-down list, additional fields appear. For example, if you select the Credit Card method, the Credit Card Number, Card Type, and Expiration fields appear.

By default, the amount field is populated with the open balance of the job. You can edit it if necessary.

Enter the amount of any tip you want to include in the Tip field.

Click **Save and Close** to save the payment and open the Payments screen.

The MobileTech Invoice Notes Screen

This page enables you to add notes to the job's invoice. Simply type the note into the main text field. When complete, scroll to the Save button and press **Enter**.

The MobileTech Add Product Detail Screen

This page displays details about the product you selected. Note that when you see this page, the product has already been added to the job.

To define information about this product, you can:

- **Add Inventory.** Use this feature to add inventory items to ServiceCEO. See the Inventory screen for details.

- **Use Inventory.** Use this feature to identify what inventory items will be used on the job. See the Inventory Source screen for details.

- **Quantity.** Type the number of this product that will be used for the current job.

- **Charge.** Type or edit the amount that the customer will be charged for this product.

- **Description.** The large field contains a description of the product. You can edit it if necessary.

- **Define Custom Fields.** If enabled in ServiceCEO (see the Defining Custom Fields section for details), you can define the value of the product's custom fields.

- **Service Contract.** If a service contract is added, the service contract section will appear as described in the Service Contract topics. If no service contract is attached, click **Select** to attach one. The Service Contracts List screen appears.

- **Define Equipment.** To add an item of equipment to the job, type search criteria for the job in the Equipment field and click **Go**. The Equipment Search Results screen appears.
  If an item of equipment is attached to this job, the equipment's name will appear under the Equipment header. If so, you can click **Replace** to remove the equipment item from the job or click **History** to display the Equipment item's history in the Equipment Detail Screen.
  If no equipment item appears, type search criteria in the field and click Go to search for an equipment item to add to the job. The Equipment Search Results screen appears.

Caution:
No information, links, or buttons related to Inventory, Service Contracts, or Equipment will appear if inventory tracking, Service Contracts, Equipment Tracking are not enabled in ServiceCEO.

Click **Save and Close** to save your changes. The Charges screen appears. Click **Delete** to remove the service from the job.

The MobileTech Add Service Detail Screen

This page displays details about the service you selected.

To define information about this service, you can define the following values:

- **Charge Type.** By default, the charge type is populated with the value as selected in the Master Service list. If necessary, you can change it by selecting a different value.

- **Quantity.** Type the number of this product that will be used for the current job.

- **Charge.** Type or edit the amount that the customer will be charged for this product.

- **Description.** The large field contains a description of the product. You can edit it if necessary.

- **Service Contract.** If a service contract is added, the service contract section will appear as described in the Service Contract topics. If no service contract is attached, click **Select** to attach one. The Service Contracts List screen appears.

- **Define Equipment.** To add an item of equipment to the job, type search criteria for the job in the Equipment field and click **Go**. The Equipment Search Results screen appears.
  If an item of equipment is attached to this job, the equipment's name will appear under the Equipment header. If so, you can click **Replace** to remove the equipment item from the job or click **History** to display the Equipment item's history in the Equipment Detail screen.
  If no equipment item appears, type search criteria in the field and click **Go** to search for an equipment item to add to the job. The Equipment Search Results screen appears.

Click **Save and Close** to save your changes. The Charges screen appears.

Click **Delete** to remove the service from the job.

Caution:
No information, links, or buttons related to Service Contracts or Equipment will appear if Service Contracts and/or Equipment Tracking are not enabled in ServiceCEO.

Payroll

The MobileTech Time Card Screen

This screen displays the employee's time card. You will be able to see the In time for each time block. Some browsers will also display the time block's Out time and Time Code.

To create a new time block for the time card, scroll to the **Add New** button and press **Enter**. The Time Block screen appears.

If a time block already exists, you can view its details by scrolling to either the In Time or the **More** link and pressing **Enter**. Doing so displays the Time Block screen.

The MobileTech Time Block Screen

This screen enables you to add a new general time block to the employee's time card.

To add a new time block:

1. Select the time code for this time block from the drop-down list.

2. Enter the In and Out times in the following manner:

In	Out
1. If you want to mark your In time as the current time, scroll to the **Now** button and press **Enter**. The current time will appear in the time field. 2. To change the displayed time, scroll to the time field and type the time.	1. If you want to mark your Out time as the current time, scroll to the **Now** button and press **Enter**. The current time will appear in the time field. 2. To change the displayed time, scroll to the time field and type the time.

In	Out
3. To change the time from morning to evening, scroll to the **AM/PM** drop-down list and select the proper designation.	3. To change the time from morning to evening, scroll to the **AM/PM** drop-down list and select the proper designation.
4. When complete, scroll down to the **Save and Close** button and press **Enter**. The In time is saved.	4. When complete, scroll down to the **Save and Close** button and press **Enter**. The Out time is saved.

Note:
The On Clock time code can only be selected if the employee's **Pay Based on Work Hours** check box is selected on their Payroll Setup tab.

3. To save the time block, scroll to the **Save and Close** button and press **Enter**.

4. To delete the time block, scroll to the **Delete** button and press **Enter**.

Time Blocks that are added or edited via MobileTech will display the MobileEdit icon in ServiceCEO:

The MobileTech Time Card Screen

This screen, accessible from the Jobs screen, displays all employees that work on a particular job.

To view an employee's time card entry, scroll down to and select an employee. The Time Card Notes screen appears.

If you are logged in as an administrator, you can search for and add an employee to this job. Employees that are added will be assigned as working with default role and will have the MobileEdit icon associated with them on the Payroll page of the Completion Wizard.

The MobileTech Job Time Card Screen

This screen, accessible from the Payroll Employees screen, displays an time card entry for the job.

MobileTech

From here you can:

- **Notes.** Type a note for this job in the Notes field. This note will appear here and on the Notes tab of the Add Payroll Item dialog box, accessible from the Payroll page of the Completion Wizard.

- **Add New.** Adds a new time block for the job with a default time code of Job. The Time Block screen appears.

Caution:
Adding a time block for a job will automatically change the duration of the job. If you enter multiple time blocks for the job, the job's duration will last from the earliest start time to the latest end time.

- **Save and Close.** Saves the note and returns you to the Payroll Employees screen.

- **Save.** Saves the note but keeps this screen open.

- **Delete.** Deletes the employee from the job in MobileTech; you will still be able to see the employee in ServiceCEO. WARNING: No confirmation message will appear, so be sure you want to delete the employee from the job before continuing.

Caution:
Deleting an employee from a job in MobileTech does NOT delete the employee from the job in ServiceCEO, it only removes the employee in MobileTech. The deleted employee will continue to appear as assigned to the job in ServiceCEO until deleted via the Dispatch Board or the Completion Wizard.

Inventory

The MobileTech Inventory Screen

This page enables you to add inventory to a job.

To add Inventory to a job:

1. Select the vendor from the **Vendor** drop-down list.

2. Type the vendor's part number in the **Vendor Part #** field.

3. Type the amount of inventory items you will be using for the job in the **Quantity** field.

4. Type how much each unit of inventory costs for you to purchase it in the **Unit Cost** field.

5. Type how much you are selling each unit of inventory for in the **Selling Price** field.

6. Type how much tax you will be charging in the **Tax** field.

7. If necessary, type a note into the large note field.

8. Scroll down to and select the **Save and Close** button. To add another item of inventory, select the **Save and New** button. A new inventory page appears.

The MobileTech Inventory Source Screen

This page displays the stock locations at which the selected inventory item is available.

If the selected inventory item is serialized, then each line item will represent a single instance of the inventory item.

If the selected inventory item is non-serialized, then each line item represents the entire stock location. Select the stock location from which you want to use the inventory item. The Inventory Quantity screen appears.

The MobileTech Inventory Quantity Screen

This enables you to determine how many instances of a non-serialized inventory item you will use for a job. Simply type the number of units you want to use on the job and click **Save**. The Inventory Source Screen appears.

Equipment

The MobileTech Equipment List Screen

This page displays a list of all of the customer's equipment items.

To display more detail about an equipment item, click the item's name. The Equipment Detail screen appears.

The MobileTech Equipment Search Results Screen

The Equipment Search Results screen displays the details about your equipment item search.

Click the name of the equipment item you want to add. The equipment item is added to the job and you are returned to the screen from which you added the item (the Add Product Detail screen).

The MobileTech Equipment Detail Screen

The Equipment Detail screen displays the details about the Equipment item.

Click the name of the product or service to see specific details of that particular installation of this piece of equipment. The Equipment Installation screen appears.

The MobileTech Equipment Installation Screen

The Equipment Detail screen displays the installation details about this specific instance of this equipment item.

Service Contracts

The MobileTech Service Contracts List Screen

This page displays a list of all of the customer's service contracts.

Select the name of the service contract (i.e., 2005 Coverage) to apply it the job or charge.

Click **Cancel** to leave this screen without applying a service contract.

The MobileTech Service Contract Jobs Screen
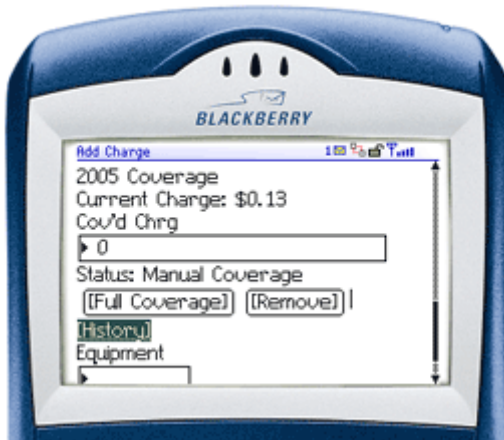
When a service contract is added to a job or a charge, the service contract section appears as displayed on the right.

Status:

- **Manual Coverage** means that you will define the service contracts' coverage yourself. Type the amount of the job/charge covered by the service contract in the **Cov'd Charge** field.

- **Full Coverage** means that all charges for this charge or job will automatically be covered by the service contract. If Full Coverage is selected, then the Cov'd Charge field will not appear.

Click **Remove** to remove the service contract from the job/charge.

Click **History** to view the service contract's history. The Service Contract History screen appears.

The MobileTech Service Contracts History Screen

This screen displays details about the service contract.

Index