ASCENTE MOBILE PRO

User Guide

This guide will go over the basic configuration of Ascente Mobile Pro including setting up Techs, along with the various features of the program.

ASCENTE MOBILE PRO SUMMARY:

This guide will go over the basic functions and use of Ascente Mobile Pro:

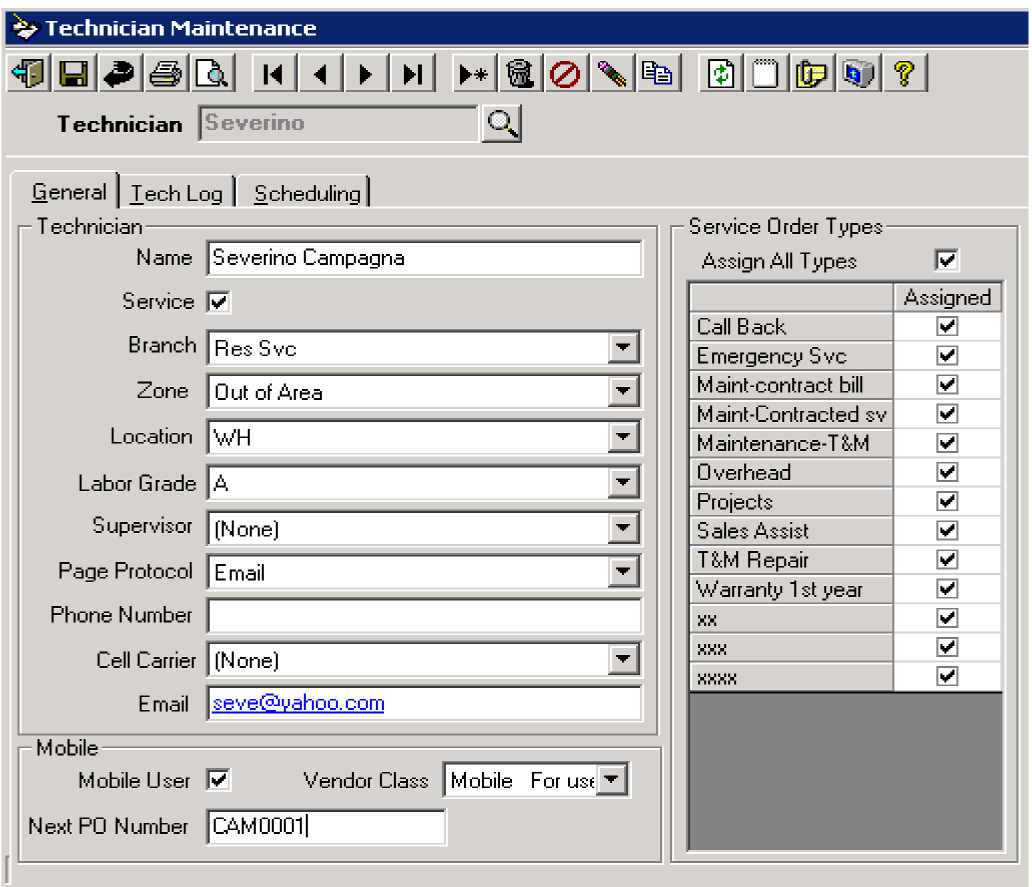
GETTING STARTED:

1. Technician Setup:

In order for a Technician to login, they will need to have their login/Id setup. This is a two part process.

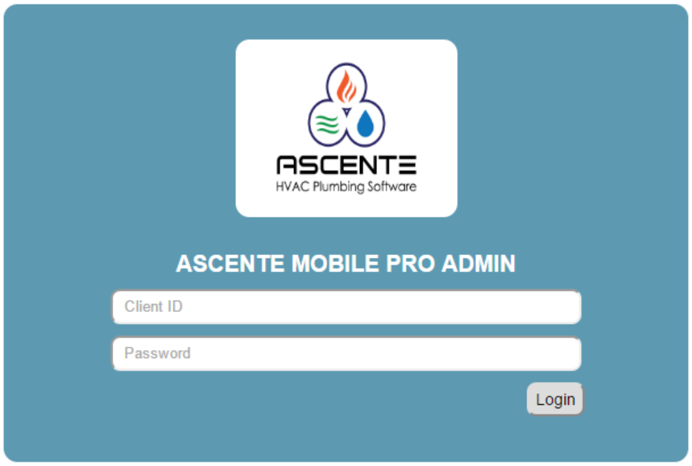
Part one is in Ascente

- You will want to go to Service Dispatch > Maintenance > Technician.
- Once here you will want to select the technician that you would like to be set up to use Ascente Mobile Pro.
- The Tech will need an Email set up. This will be their Id to login each time.
- You will also want to make sure that the "Mobile User" box is checked.
- If you want the tech to enter Purchase Orders, enter a unique range of PO numbers in the box provided. I would suggest entering the tech's initials, or first part of his last name followed by 0001 (which gives him 10,000 purchase order numbers. Remember that the prefix must be unique or there will be problems with overlapping purchase order numbers. If this field is left blank, the tech will not be able to enter PO's on his tablet.



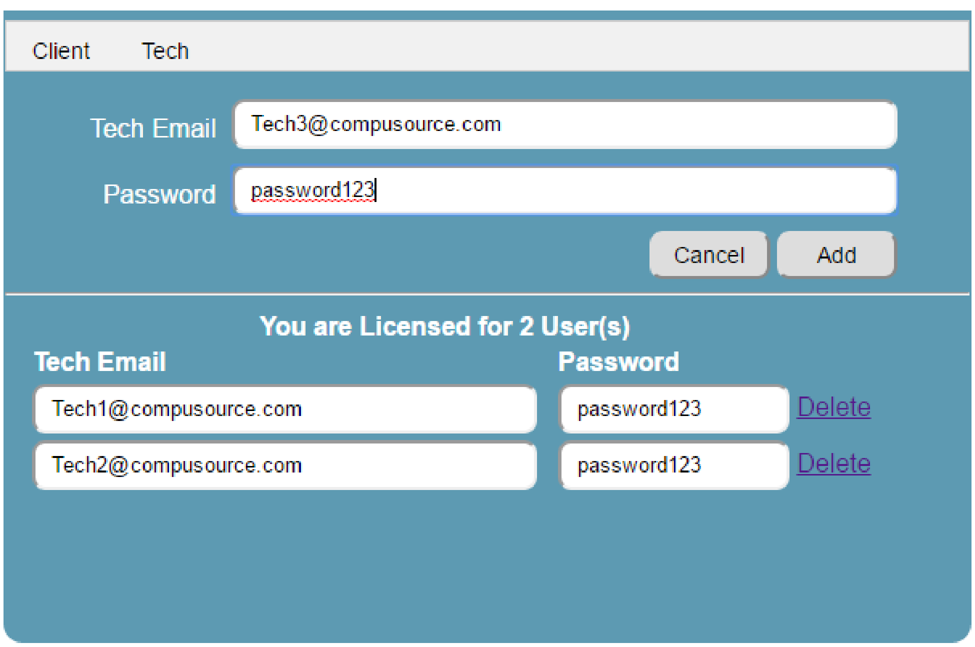
Part two is in the Ascente Mobile Admin Portal

- Browse to http://mobile.compusource.com/amp.admin/Html/AmpAdmin.html
- Here is where you will be able to manage the logins and passwords of your techs.



- You will be prompted to enter your Client ID and Password which will be provided by your Project Manager.

- After entering the ID and Password you will be brought to a prompt with two buttons
- Clicking on "Tech" will allow you to adjust the Technician Email/Id and password.

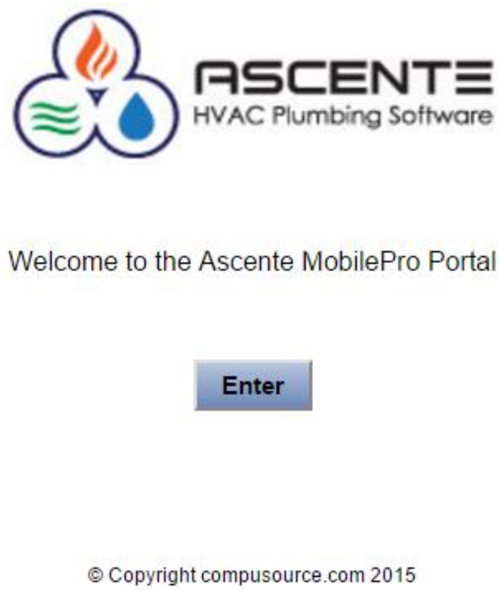


- In the Tech Email field you will type in what is in the **email** field of the Technician Maintenance in Ascente.
- You will want the tech email to match **exactly** what is in Ascente for it to be linked properly.
- After entering in the Tech Email and Password that you would like them to have, click "Add"
- You are also able to adjust the Tech email and password after their creation, along with the ability to delete their login.

2. Login:

Now that the tech is set up, you will want to browse to the Ascente Mobile Pro Web Portal.
http://mobile.compusource.com/amp2/Amp.html

- You will be greeted by a welcome screen:



- Press “Enter” to begin.
- Now you will enter the Tech login Id and Password that was created in step 1.

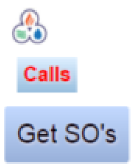
- Press **Login**, then **Download All Tables**
- Once the login has been authenticated and tables downloaded, press **Login** again.

Using the program:

1. Receiving a Call:

You have now successfully logged into the Ascente Mobile Web Portal, now we will go through the process of getting a call from the server or creating a call.
Note: The Service Order will need to have the status of "Dispatch" for the technician to pick it up.

- You will be greeted by two buttons, Calls and Get SO's.
- Press **Get SO's**.



- Now you will see three additional buttons:

- **Download SO's** will download whatever calls are dispatched to the tech
    - One at a time? - If only one call is dispatched to the tech, they will only see one
    - Entire Day? - If all the tech's calls are dispatched for the day, they will be able to see them all here.
  - Note the date next to Download SO's. This will only pull calls dispatched on this specified date.
    - If you want to have the tech have the option to see calls for tomorrow, you can dispatch his calls to him on tomorrow's date and when he clicks to Download SO's, he will see them
- **New Service Order** will create a new SO on the fly
  - This is useful if the tech is on call at night for instance and going to an existing jobsite
  - Enter a partial jobsite name or address in the "contains" field and hit the lookup jobsite to see if it exists.
  - If it doesn't exist, you can create a jobsite with the New Jobsite button, then go back to new service order to create the service order.
- **New Jobsite** where you will go to create a new jobsite
  - Useful if tech is on call after hours and gets a call from a residence that hasn't been serviced before.
  - **Do not** create a new jobsite until you are sure it doesn't already exist.
  - As stated in New Service Order, after the creation of the New Jobsite, go back to new Service Order and select the newly created jobsite.

- After pressing Download SO's you should now see one or several calls listed below.
  - As mentioned above, only calls that are set as "Dispatch" or created on the unit will show up here.
- Now that you have one or several calls brought down to the unit you will want to select the call. Press the blue "Select" button, located to the left of the Jobsite Name. This will bring you to the Details tab.

2. Details:

The details tab is the primary tab of the Ascente Mobile Web Portal. From this tab the technician will be able to select their call status. They will also be able to see the basic information for the call such as the Problem, SO Type, Trouble, and other fields. They can also adjust/override the customers default price level and invoice style.

By clicking on a status, the call will update on the board letting the dispatcher know the status of each technician. The different status' are as follows:

- Dispatch
  - This is the default status when pulling a call down from Ascente.
- In Route
  - The technician will want to press the In Route button when heading on his way to the jobsite. It will timestamp this time which will be used to determine the travel time. This will be discussed further in the "Labor" area.
- Arrive
  - Upon arrival the Technician will want to press "Arrive".
- Incomplete
  - If a technician is unable to finish the job while at the jobsite, they can select the incomplete status. This will be used if they need to wait for a part order or for another technician to come help or other situation. If there are more than one incomplete status codes available, the tech will be able to select from the available incomplete status codes.
- Close
  - Once the technician has completed the job, clicking close will signify the end of the job. This will end the time at this jobsite and will be signified in the labor tab. If there are more than one close status codes available, the tech will be able to select from the available close status codes.
  -
- Attach
  - While not a status, this is placed under end in case a technician would like to attach a picture or file to the service order. This can be useful for taking pictures after an installation or other scenario.
- Sync
  - Sync will send back the parts, labor, and notes to the server.

SO: O28766 BARRETT / THRINA
Calls
Details
Jobsite
Investigation
Parts
Notes
Labor
Maint
Extra
Review
Dispatch
In Route
Arrive
Incomplete
Close
Attach
Sync
Problem
FIRST TIME CUSTOMER / MAIN WATER LINE LEAK / GROUND IS SATURATED / QTD 50.00 TRIP CHG / PMT BY
SO Type
Plumbing
Trouble
PLUMBING - REPAIRS
Comm/Res
Residential
Sold By
Terms
3
Caller
THRINA
PO
Price Level
STANDARD
T&M/Fixed Pr
Time & Material
Estimated Hours
1

3. Jobsite:

The Jobsite tab will contain the important related to the jobsite:

- **Name/Address**
    - The phone numbers are linked to those in Ascente
- **Map**
    - A map that will show the jobsite and surrounding area
- **Components**
    - If you added a make/model/serial number in Ascente, it will show here
    - This will not go to the server until call is sent back
    - To add a new component, type it in Local Id, click out of the field, and then click the add button
    - You can have control over what the tech can edit/see
- **Field notes**
    - This is a basic form of tech to tech communication
    - Techs can enter notes here that they don't want seen on the invoice such as check the gasket.
    - These notes can be viewed in Ascente as well.
    - They are volatile, if they are overwritten, the old information is gone forever. Note, you can add to the information if you do not want to get rid of it.
- **History**
    - This will provide a list of previous SO's out to this jobsite
    - You can choose how many you would like to come down
        - Default is set to 10
    - You can also do a Component History Lookup
        - This is useful if you have separate SO's per component
- **Open Calls**
    - The tech can see other open calls for this jobsite
    - The tech could request to have another call dispatched to them if they wish
    - NOTE: This will be hidden if there are no other open calls for this jobsite

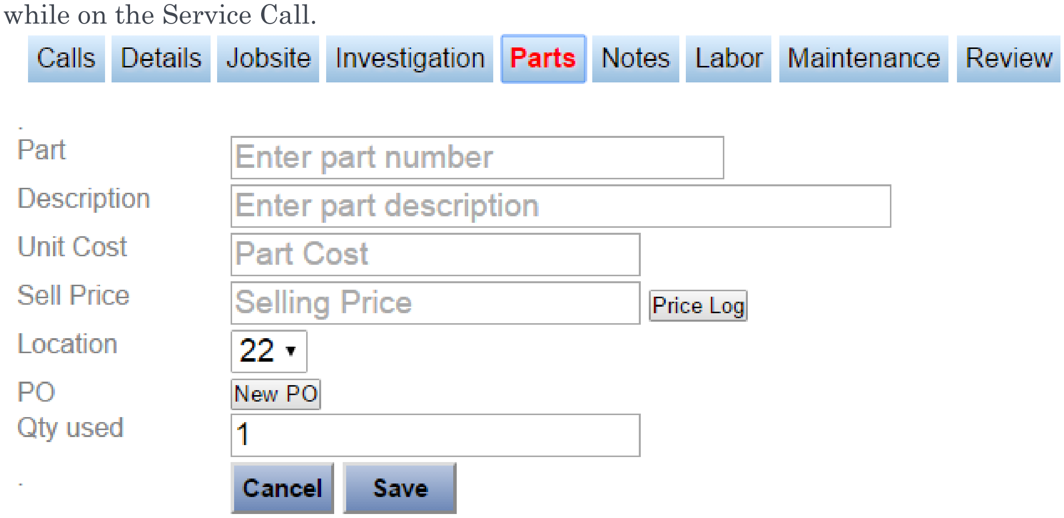
4.Investigation:

The investigations tab is an optional way that can be used to have your technician give options while out at a call. This can be used to help increase the total revenue per call. A tech can give a good, better, best scenario, or use it to show groups of unrelated tasks.

- First you will select an option starting with Option 1.
  - Here you can input the items
- You can repeat this for up to four different options
- You can then present the summary to the customer
  - After a customer picks what they would like to do, go to the option and press the “Accept This Option” located at the bottom of the screen.
- Once selecting an option all the parts will get placed into the parts screen and the description of the tasks will appear on the notes tab.

5. Parts:

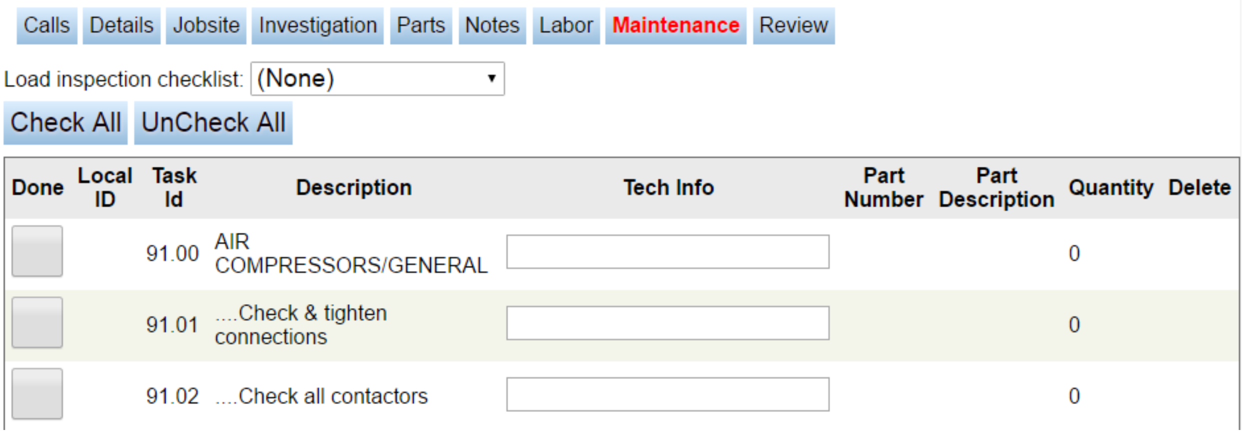
If you not using the investigations tab, you will be using this screen to input all of the parts used while on the Service Call.



- The technician will start by entering in a part
  - Once two letters are entered it will drop down the 10 closest matching options which can then be selected.
  - This will narrow down with each consecutive letter.
- If the part is non-stock, then everything will need to be entered manually.
- Any part added can be deleted by pressing the delete button once it is in the grid.

6. Maintenance:

Maintenance can be used when going onto a jobsite that you have an inspection sheet for, or if you have a list of tasks that need to be completed.



Done	Local ID	Task Id	Description	Tech Info	Part Number	Part Description	Quantity	Delete
		91.00	AIR COMPRESSORS/GENERAL				0	
		91.01	....Check & tighten connections				0	
		91.02	....Check all contactors				0	

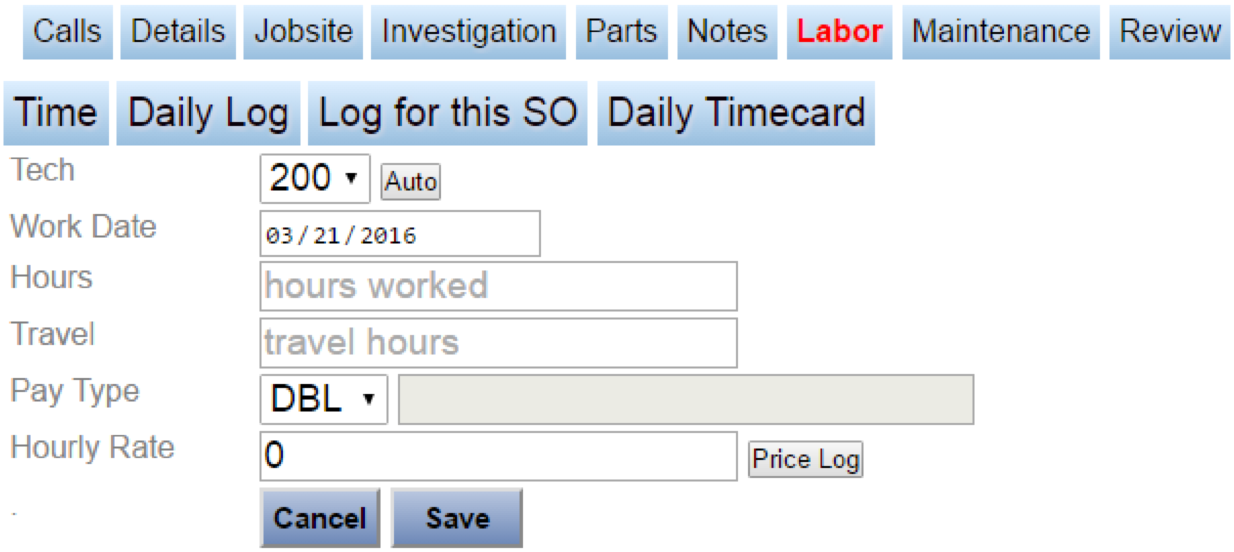
- **There are two types of maintenance**
    - If it is a maintenance service order from Ascente, the tasking will be displayed by component, as is was tasked in Ascente in the office
    - If it is a service call, the tech can select an inspection checklist
- This will all show on the invoice, showing what was completed and any notes that here placed about it, such as voltage readings
- You can click on the dropdown to load a checklist.

7. Notes:

You can enter the Work performed and any recommendations here. This will all show on the work order along with the parts in Ascente.
Note: If the call was sent back and re-dispatched, any old notes will show in a “Greyed out” un-editable field.

8. Labor:

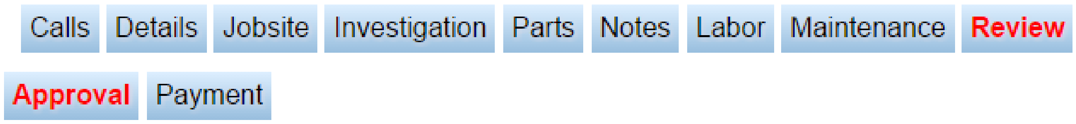
The Labor area will allow the Tech to enter their travel and worked time on the job.



- **Time**
  - The Auto button will automatically fill in the information based on the time that has been accrued between Service Order Statuses
    - In Route > Arrive > Close
  - This can be overridden by typing over it
- **Daily Log**
  - This will show the elapsed time between statuses
- **Log for this SO**
  - This will show the Log for the current Service Order
- **Daily Timecard**
  - This will show the time for all calls from that Tech for the current day

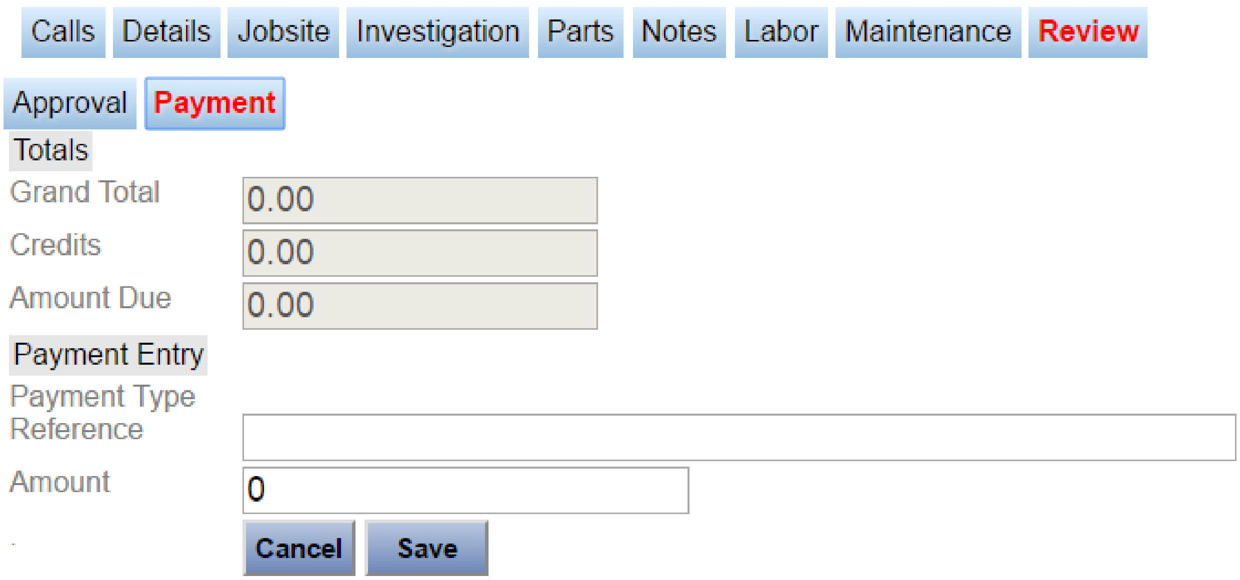
9.Review:

In the review area, the technician will be able to present the invoice to the customer, have them sign it, and then have it sent to them. A blind copy will also be sent back to the server, so the invoices will be able to be pulled up from history.

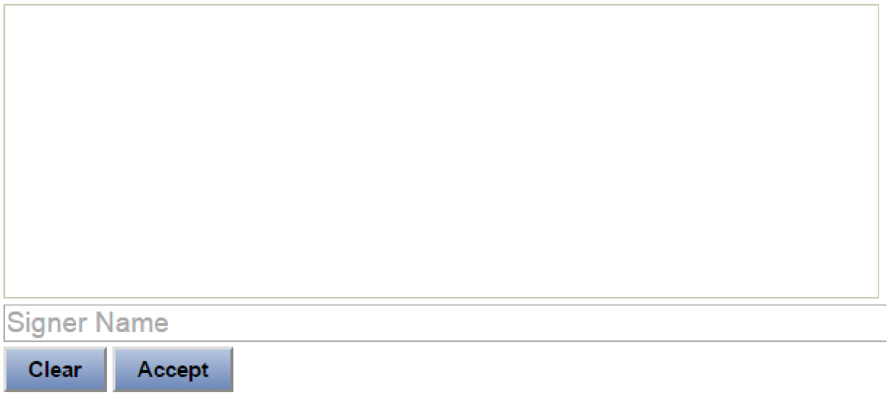


In the Approval area, the Technician can present the invoice to the customer/client, have them look it over. Once this has been looked over, the Payment button can be pressed.
Note: For some jobs a payment is not taken and this step can be skipped.

The payment type such as Cash, Check, Visa can be selected and entered on this tab. Once the payment information has been entered, the tech will want to review it with the client again and have them sign. You can optionally have their name typed underneath if the signature is illegible.



After pressing "Save" it will show the payment on the invoice. Once the payment information has been entered, the tech will want to review it with the client again and have them sign. You can optionally have their name typed underneath if the signature is illegible.



Upon clicking “Accept”, you will be brought to the email page. The Jobsite email field is linked to the email in Ascente. If this is changed on the tablet, it will change in Ascente. This can be useful if a jobsite has updated their email address. The customer email is not updated back to Ascente. The tech can also pick an Other Email to send this document. The other email address is not stored in Ascente. If the other email is populated, the document will be sent to that address. It is possible to send emails to the Jobsite, Customer, and Other at the same time. The Jobsite Email and Customer Email must be checked to send the document to these addresses. After the tech is satisfied that the emails are correct, they can click “Email”. This will send the invoice to their email along with a blind copy to the server. A copy of the document will also be attached to the service order in Ascente.