TechPro

USER DOCUMENTATION

3.6

OmniByte
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FARGO, ND 58102

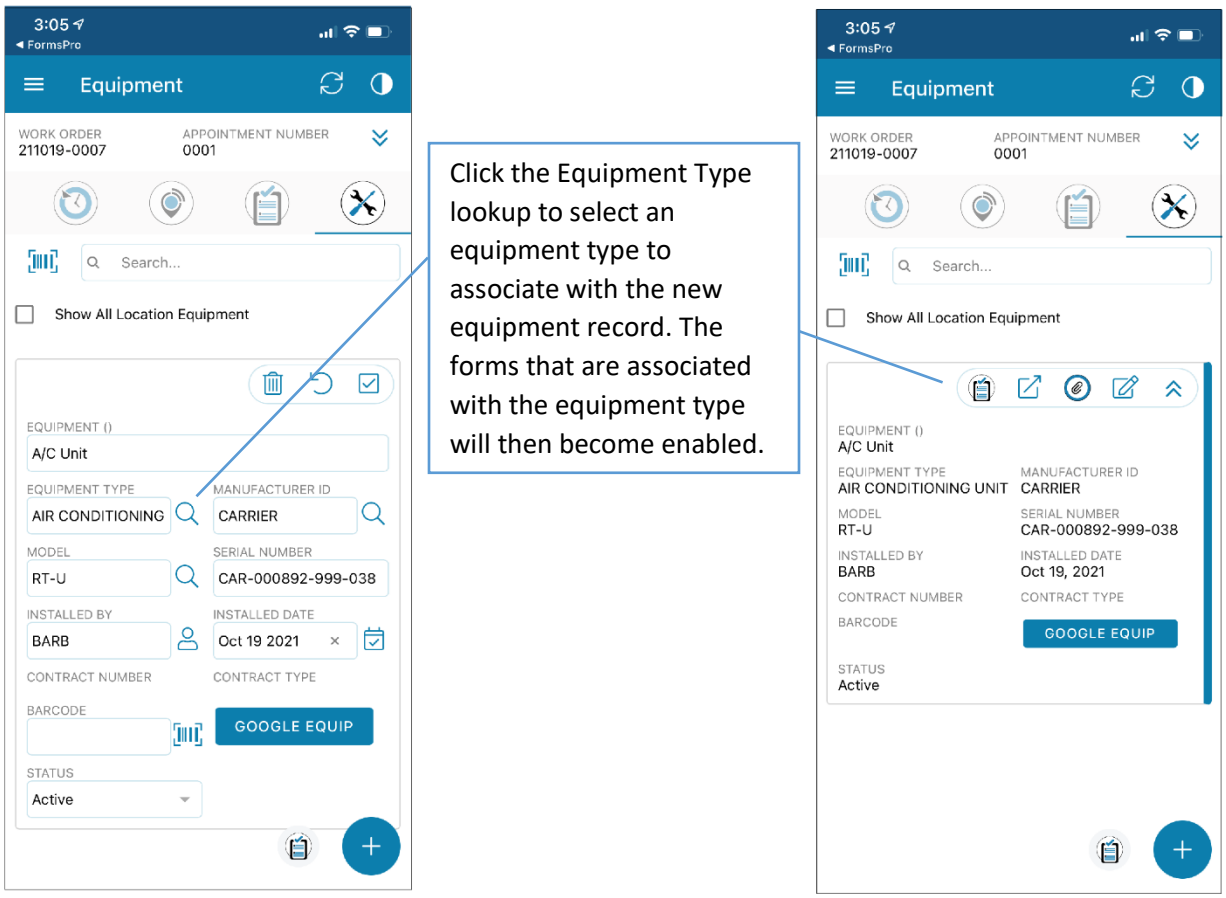
Contents

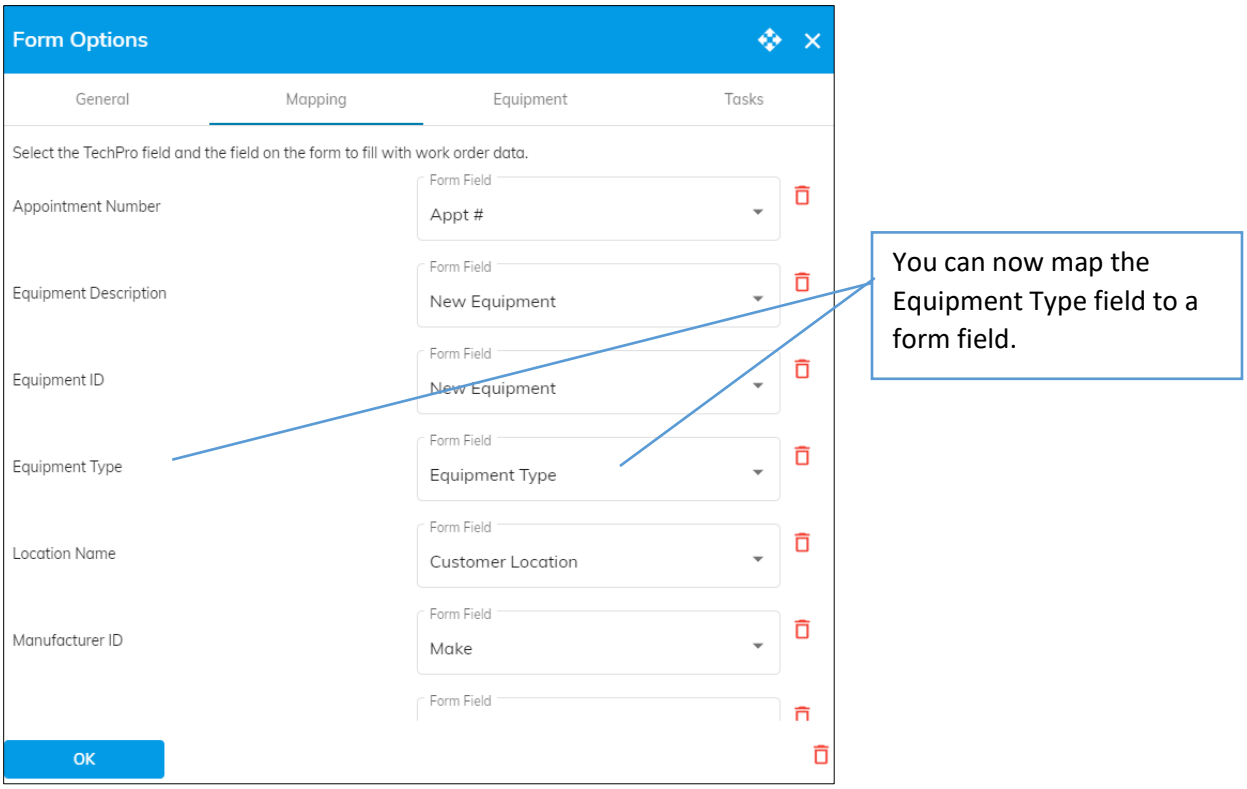
What's New in 3.6

This update is one of our most feature-filled releases to date. Contact us at support@omnibyte.com if you have any questions about any of these features.

Equipment Types

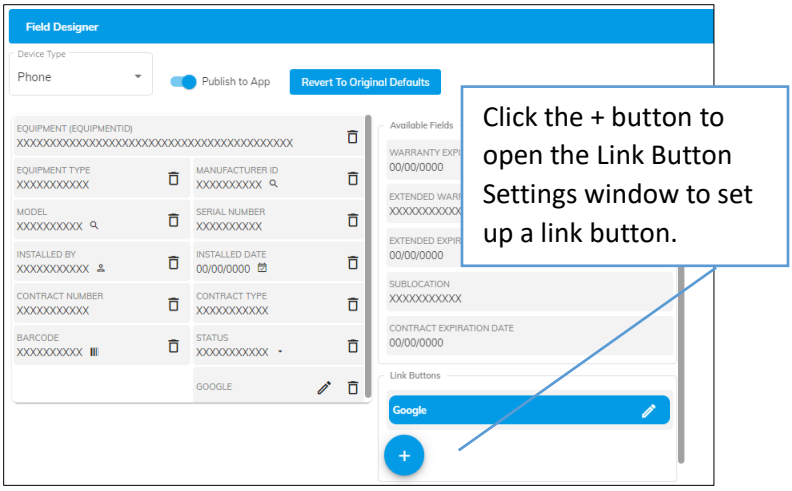
The ability to submit forms for new equipment records based on the equipment type has been added in this release. In the Equipment workspace, the Equipment Type field now has a lookup that contains all the equipment types in the back office. As new equipment is added, an equipment type can be selected, which then enables any forms associated with that specific equipment type. Equipment Type has also been added as a field that can be mapped in the Form Options window.





Links to Other Sources

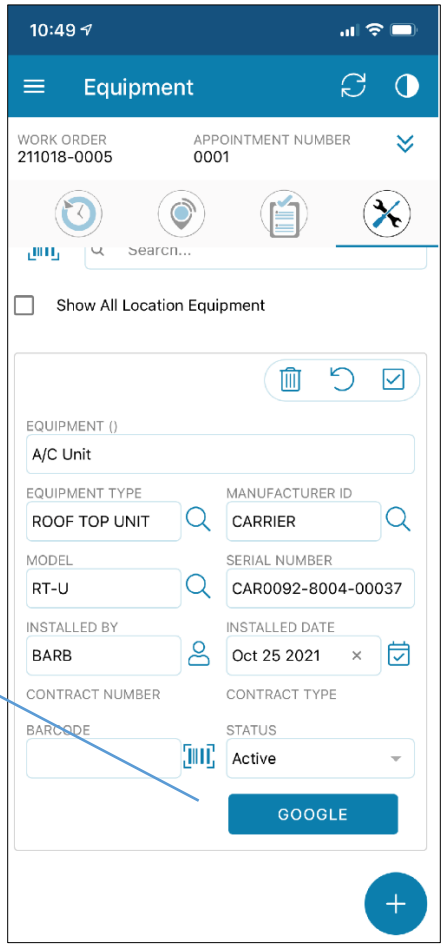
Link buttons have been added to the General (for appointment lists), Equipment and Parts field designer areas to navigate to common URLs needed by technicians and/or to use APIs to further expand the capabilities in TechPro. For example, you could use a link button to link technicians directly to the location where service call files are stored. Or the link button could be used to open a SharePoint folder that contains the equipment IDs on work orders. For more information about using the Field Designer, see App Configuration Using User-Defined Fields and the Field Designer.



Data connections must be set up to use this functionality (not applicable for URL link types). Data that is passed using the connection is all unposted or prior to processing in Signature and is in the state it's in at

the time of the link. Also, no verifications occur that TechPro information has been used for any links or mapping. Therefore, if data is passed to another application, then subsequently edited, or deleted in TechPro, no further action takes place in TechPro.

Once the setup is complete, the link button(s) will appear in the app.



In this example, if you click the Google button, the Google webpage will open directly from the Equipment workspace.

Maintenance

As with most releases, we've performed maintenance on the Admin Site and mobile app and fixed reported issues.

In case you missed it, here's what we added in 3.5.1

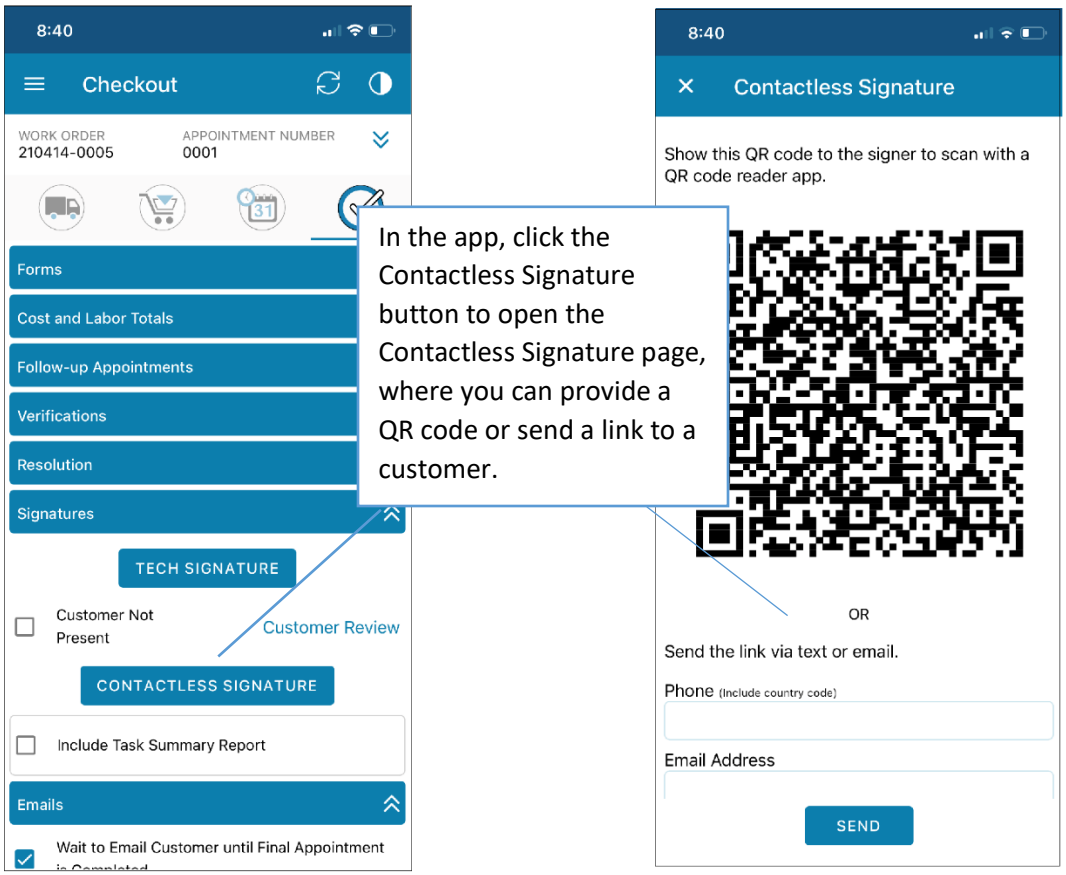
Contactless Signatures

It is important to take necessary safety precautions with today's concerns about things such as Covid-19. You can now use contactless signatures to protect your technicians and customers by allowing signatures in a touch-free manner using a QR code. A QR code is a machine-readable code consisting of black and white squares that store URLs read by your device's camera. Contactless signatures are an effective way to receive a signature from a customer when the customer isn't present, and it prevents a technician from having to return to a customer site for a signature that was forgotten.

Contactless signature options have been added to the Checkout page in App Settings to handle signatures received after the technician completes a checkout. They can be managed individually, or you can automatically attach an updated work order report to the work order in the back office.

The Contactless Signature Log has been added to the System Logs page so that you can view the completed work orders that were checked out *before* a contactless signature was received.

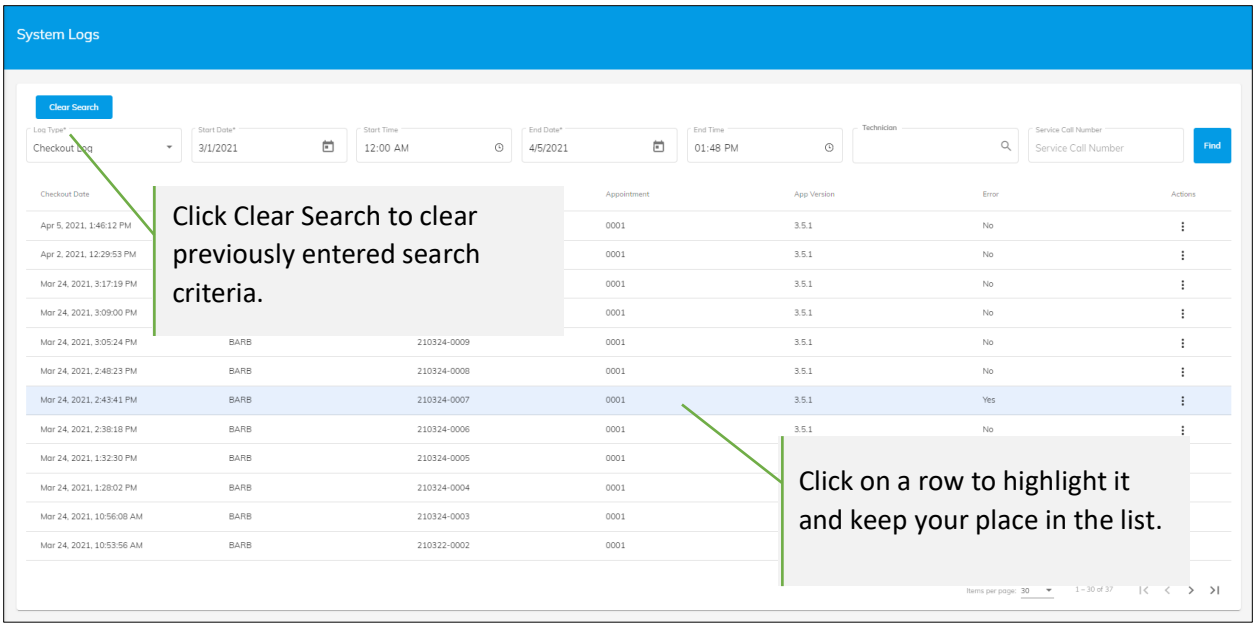
In the TechPro app, enter information you need to provide to the signer in the Signatures section of the Checkout page. After a user scans the QR code or receives the link they can sign the appointment and send it. The appointment can then be processed as it typically is.



Enhancements to the System Logs Page

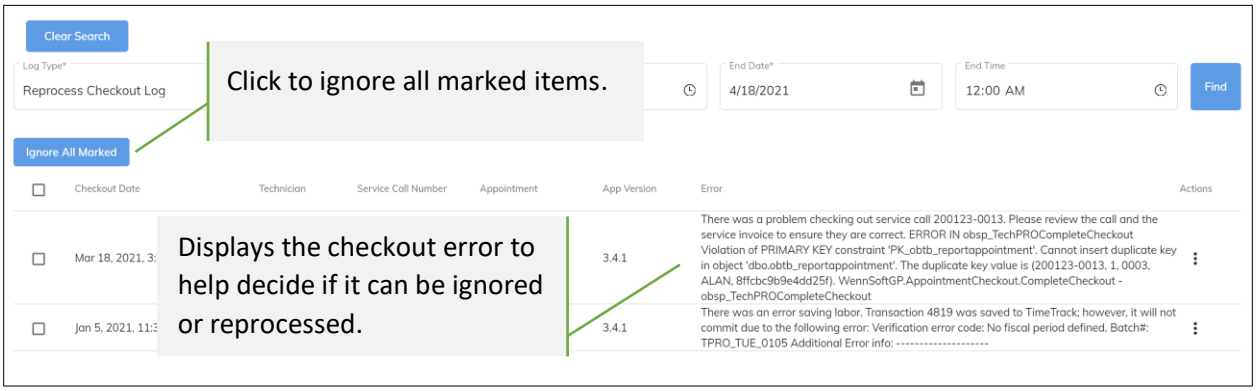
The System Logs page has been improved to be more efficient in this release. Enhancements include:

- A Clear Search button has been added so that you can clear previously entered search criteria.
- Data is retrieved once the Find button is clicked. If you change the criteria, the search is not performed until Find is clicked again.
- The ability to highlight a row so that you can keep your place. Also, if you open another window from the System Logs page, the row from which you opened the window remains highlighted.
- The ability to cancel a search. For example, you want to view a month's worth of checkout logs and you accidentally enter the wrong date. Click Cancel Search, while the search is processing, to change the criteria and start over with a smaller search range.



Reprocess Checkout Log Redesign

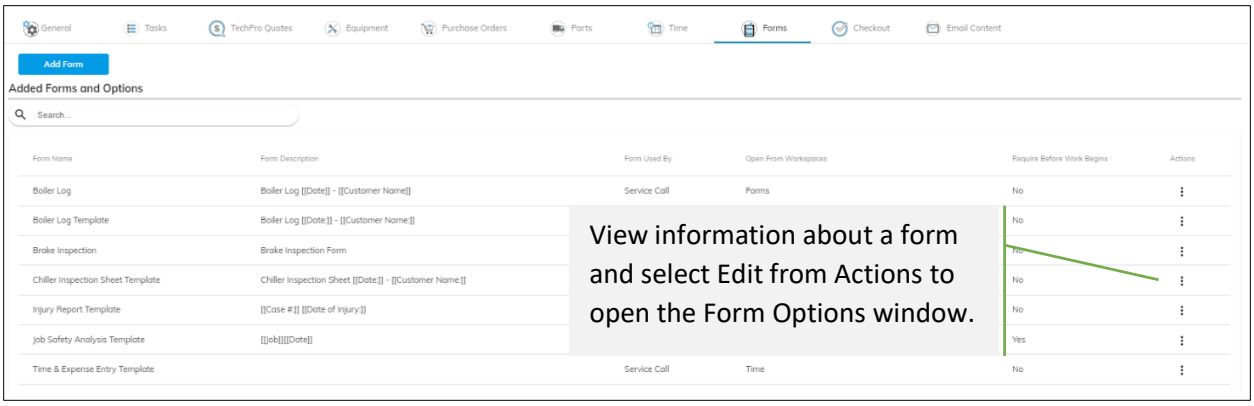
The Reprocess Checkout Log has been redesigned in this release. Checkboxes have been added to the list items so that you can mark each one, then click the Ignore All button with the intent to "bulk ignore." The checkout error has been added to each line to help decide if the error can be ignored or reprocessed without having to view the details of the line. A Reprocess option has been added to the Actions menu to reprocess directly from the list. In addition, an Ignore button has been added to the Checkout Information window so that you don't have to go back to the log page to ignore an error.



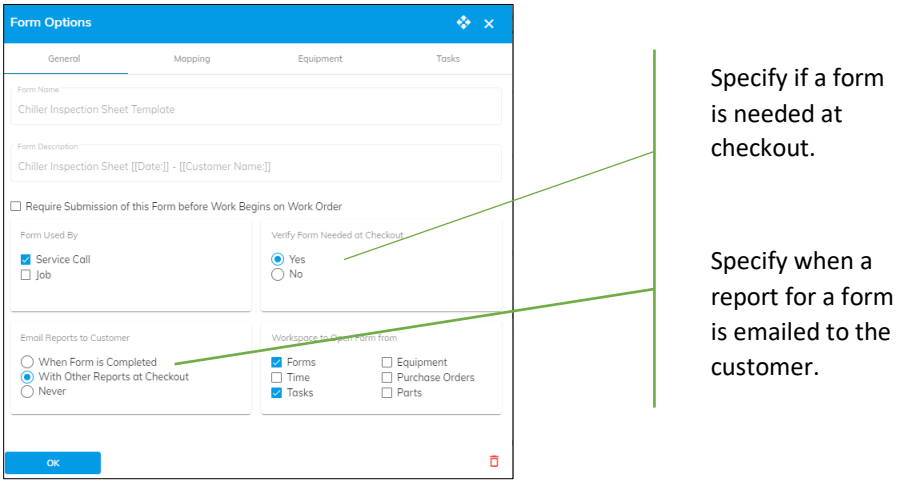
Integrated Forms Enhancements

Several form enhancements have been made in this release.

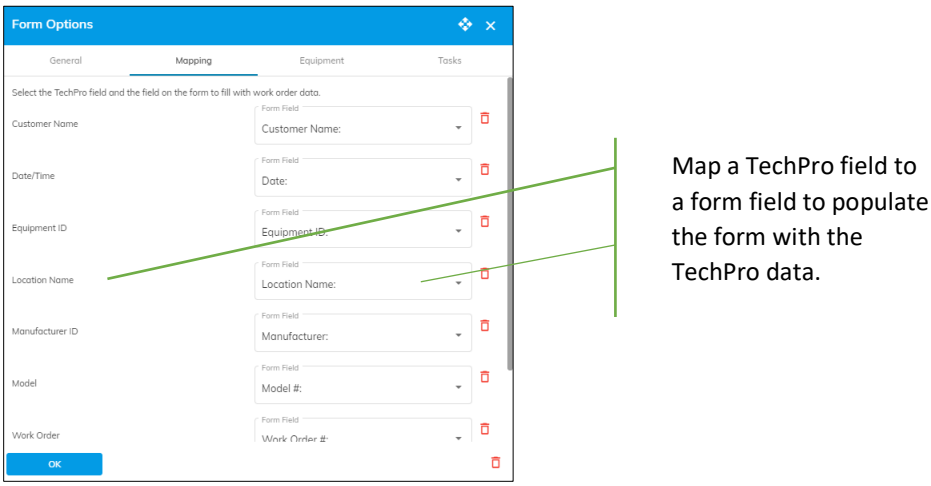
The Forms tab in App Settings has been redesigned so that you can view more information at one time, such as if the form is used on service calls and/or jobs, or if a form must be submitted to start work.



A new Form Options window has been added to easily manage forms, map TechPro fields to a FormsPro field, and associate equipment types and task codes to a form.



Mapped fields populate information from the workorder into the FormsPro field on the form.



Number of Characters in a Phone Number

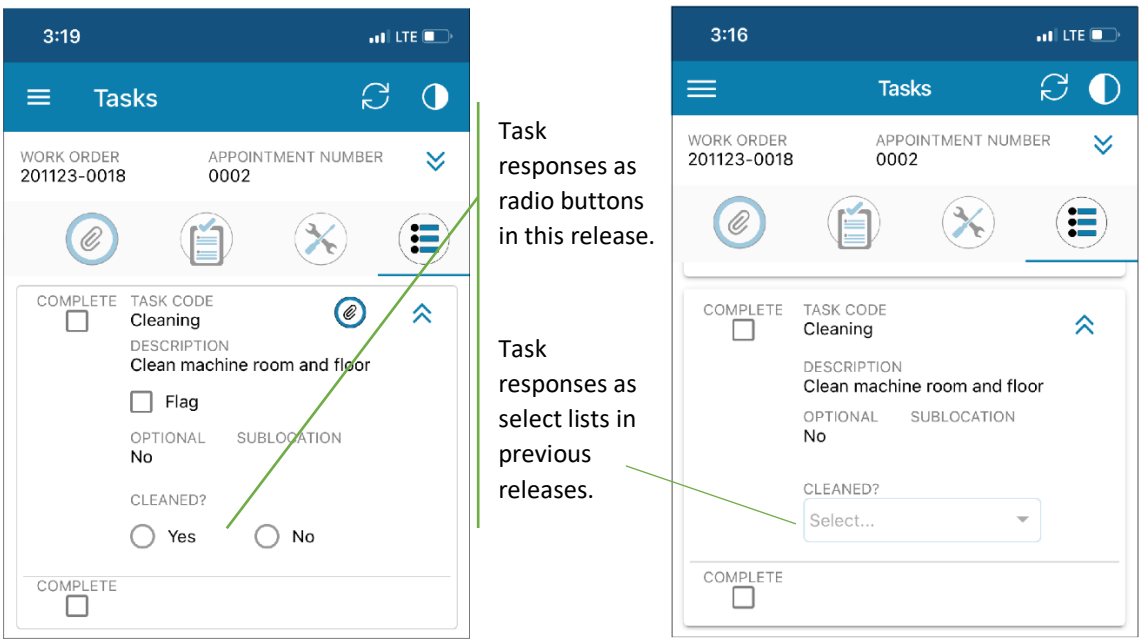
Telephone number formats vary by country. New fields have been added to the App Settings page to enter the number of characters you use in a phone number and to specify if you want to use symbol

characters in the number count. For example, you would enter 10 for a US a phone number with no parentheses, spaces, or dashes.

In case you missed it, here's what we added in 3.4.1

Yes/No Task Responses

Task responses set up in the Signature Task Responses Setup window are Yes/No select lists, which require you to make additional clicks when checking off responses. In this release, the task responses have been changed to Yes/No radio buttons. This saves you time by simply marking your response in one click.



Completed Tasks Filter

If you have the Hide Completed Tasks, Hide Completed Sublocations, or Hide Completed Equipment options marked in the Tasks filter, tasks, sublocations and equipment are now removed from the workspace as they are marked completed. You no longer need to refresh the filter to remove them from the workspace. All of the hide options persist until changed or a clear data happens. You don't have to keep going into the filter to mark them.

Attachment Caption Tags

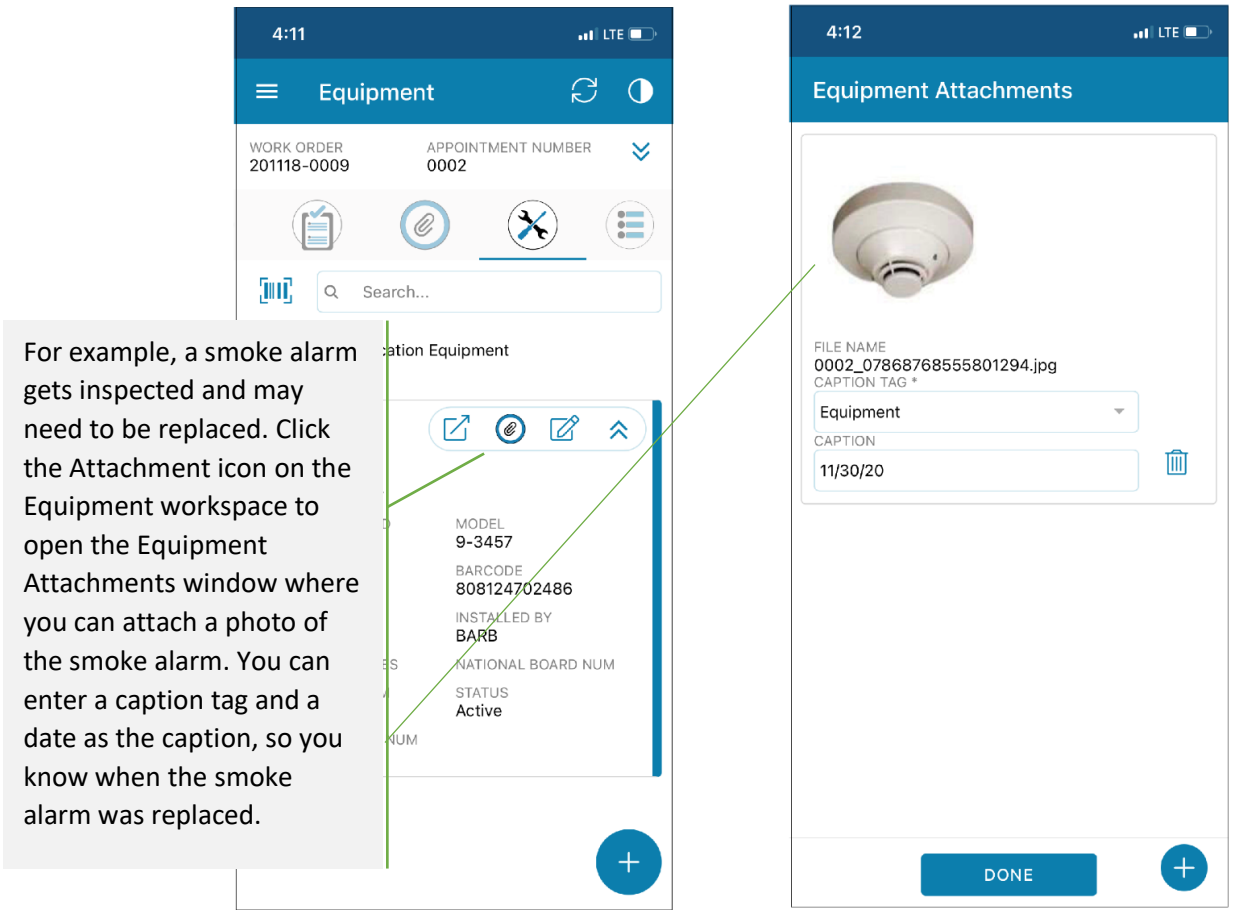
TechPro now has attachment caption tags to categorize captions with consistent wording for all attachment types, including equipment, tasks, and purchase orders. For example, you may have technicians that have to sign a logbook when on-site. You could create an attachment caption of "Log." Then when the technician takes a picture of the log and attaches it to a record, they simply select "Log" as the caption tag.

Attachments Added to Equipment and Task Records

An Attachment icon has been added to the Equipment and Tasks workspaces to allow you to take a photo or use an image and attach it to equipment and tasks. Similar to purchase orders, the icon will

appear filled in if an attachment exists. You can view equipment level attachments on other work orders.

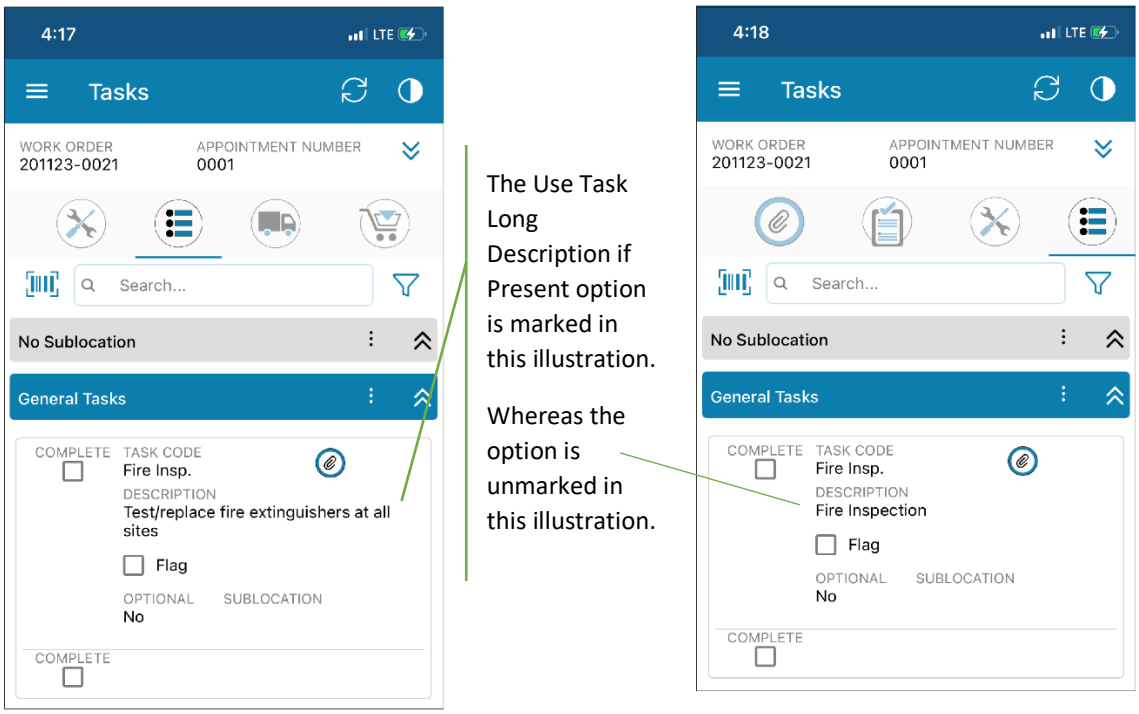
You can also view existing photos that were previously attached. This feature can be very useful when equipment is considered an asset and requires a photo as part of its record.



For example, a smoke alarm gets inspected and may need to be replaced. Click the Attachment icon on the Equipment workspace to open the Equipment Attachments window where you can attach a photo of the smoke alarm. You can enter a caption tag and a date as the caption, so you know when the smoke alarm was replaced.

Task Long Descriptions

The Use Task Long Description if Present option has been added to the Tasks app settings page. This allows you to substitute the long task description for the task description when one is entered in Signature's Task Code Setup window. The long task description is beneficial when you need to provide more details about what to do when performing a task.



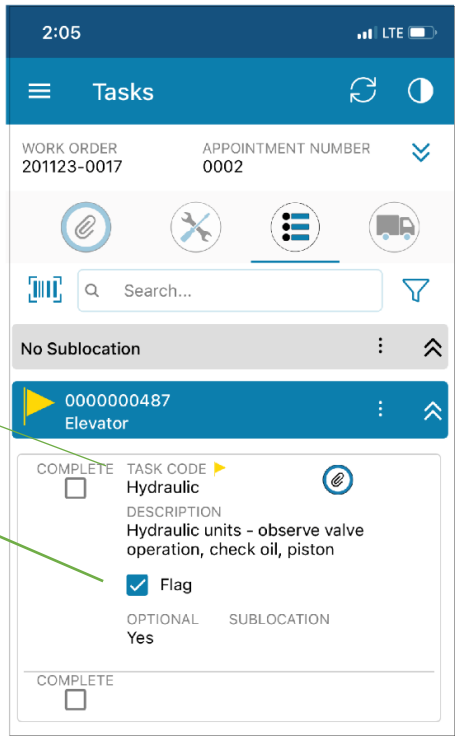
The Task Long Description field is not in the Task Code Setup window as part of the standard Signature product. It is added using the Modifier then access is granted in the Alternate/Modified Forms and Reports window. The Task_Long_Description field is stored in the SV00506 table.

Task Flags

There may be times when you need to flag a task for something such as a compliancy issue or for review. In this release, the ability to flag a task has been added to the Tasks page in App Settings:

- Toggle the Allow Technicians to Flag Tasks option on and a Flag checkbox is added to the Tasks workspace in the app.
- Then, select a user-defined field to store the flag value. The user-defined field is used to display the flag on task equipment and the task on subsequent appointments until the flag is unmarked.

In this example, the Flag checkbox for the Hydraulic task has been marked, which then applied the yellow flag to the Task Code heading and the Elevator equipment header.

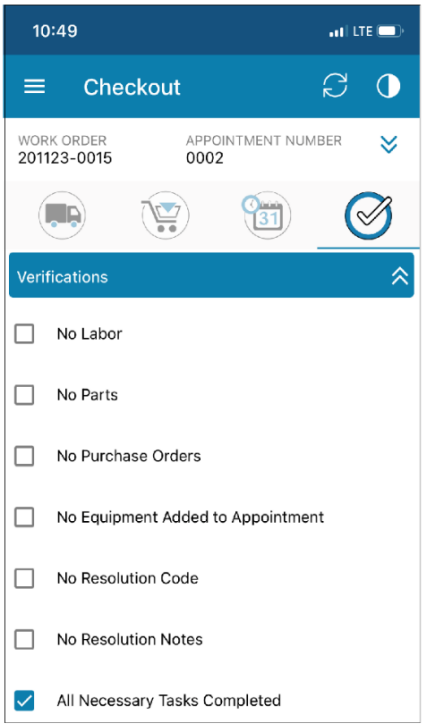


Task Complete Warning

An Incomplete Tasks on Appointment checkbox has been added to the Checkout tab on the App Settings page. When this option is marked, and if there are any incomplete tasks on the work order, an All Necessary Tasks Completed checkbox is added to the Verifications section of the Checkout workspace. Technicians mark this checkbox to indicate that any tasks that are left incomplete are OK to be left unmarked and the appointment can be checked out. Otherwise, a technician needs to complete the task and mark it complete to submit their checkout.

If all tasks are complete, this checkbox won't appear on the Checkout workspace.

A technician marks the All Necessary Tasks Completed option to indicate that the appointment can be checked out even though there may be incomplete tasks.



Inventory Lookups

The Inventory Lookup on the Parts and Purchase Orders workspaces has been improved in this release. Now when the Inventory Lookup page is opened the first 100 records are returned based on the technician's primary default site. The filter button is still available on the Inventory Lookup page to further limit the items based on the existing other filters.

Conditional Reports

The Report Settings page has been added so you can create a user-defined field query, then retrieve the fields to create a condition for a specific report. When checking out an appointment, the conditional report will be printed and emailed when those conditions are met.

TechPro Admin Site

The Admin Site contains the settings needed to configure the mobile app. Once these setup procedures are complete, when an appointment is dispatched to a mobile user, the appointment appears on their device.

Once an appointment has been dispatched, work can begin on the appointment. While the appointment is being worked, the data entered on the device is stored on that device until the user clicks Submit in the Checkout workspace as the last step of the appointment. Therefore, we recommend that you don't make any changes to the appointment in the back office while it's being worked.

Back-office checklist before you start

There are features in TechPro that rely on settings in Dynamics GP and Signature. Here are a few things you may want to verify before you begin:

Differences in Job Cost vs Service Call Appointments

Since technicians are more concerned with completing their work regardless of the appointment type, we've made efforts to reduce the differences between job cost and service call appointments in the mobile app. However, because of the back-office differences there are a few things that you'll want to be aware of as an administrator.

Cost Codes

The cost code used for time entries is the one assigned to the appointment when the appointment is set up in Job Cost. Since there is no option for a cost code at the appointment level for parts or purchase orders, the Cost Code for Job Appointments field is on the Parts and Purchase Order app settings tabs in the Admin Site for setting a master cost code. The cost code is visible, but it can't be edited on the mobile app in the Time workspace; but is not visible in the Parts or Purchase Orders workspace. (You can add it as a user-defined field, if it's important information for technicians in your organization.)

If a part or purchase order is entered for a job appointment that does not have a cost code assigned in the Admin Site, the checkout displays an error that you need to address in the back office.

Call Types

The call type "JOB" is displayed for all job appointments, since there are no types defined in Job Cost.

Field Designer

The Field Designer does not designate between Job Cost or Service Management. Changes you make apply to appointment types in both modules. You may need to instruct technicians to ignore fields you add for one type or the other, especially for user-defined fields that are editable.

To Use Attachments on a Purchase Order

Images can be attached directly to a purchase order so that when the work order is submitted, the image is attached to the purchase order in the back office. Your techs can take a picture of their receipt and attach it directly from the workspace they're in, which reduces the number of clicks to get to the attachment, but more importantly, reduces the risk of losing paper.

The Allow Document Attachments option must be marked in the Document Attachment Setup window for the attachment to attach to the purchase order. If this option is not marked, the tech can still use the Purchase Orders workspace to attach the image, but it is attached to the service call or job instead. To check your back-office setting, use this navigation: Microsoft Dynamics GP > Tools > Setup > Company > Document Attachment Setup.

Displaying Attachments in the Mobile App

In order for attachments on a work order to be displayed for download in the mobile app, you must select the Copy To Database option in the Source Document section of the Document Maintenance window when adding the attachment. The Document Maintenance window is opened by clicking the Add button in the Document List window. TechPro supports downloading the following attachment types:

TXT	PDF
JPG	PNG
DOCX	DOC
XLSX	XLS
XLSM	PPT
PPTX	

Keep in mind that the device must have an app that can view any of these types installed to view it.

Android 10 devices have an option to save images as HEIF/HEIC format. This format is not supported for images taken and uploaded using the photo gallery. This option should be turned off in the camera save settings in order to prevent attachment errors.

Use Sales Order Processing for Inventory

If you have the Use Sales Order Processing for Inventory option marked in the Invoice Options window (Microsoft Dynamics GP > Tools > Setup > Service Management > Invoice Setup > Invoice Options), inventory parts create sales invoice transactions in Sales Order Processing for processing parts after checkout in the back office. If unmarked, TechPro continues to create inventory adjustment transactions for parts. Mobile app users see no change. This change only affects how the transactions are handled in the back office.

Equipment Added to the Work Order from the Mobile App

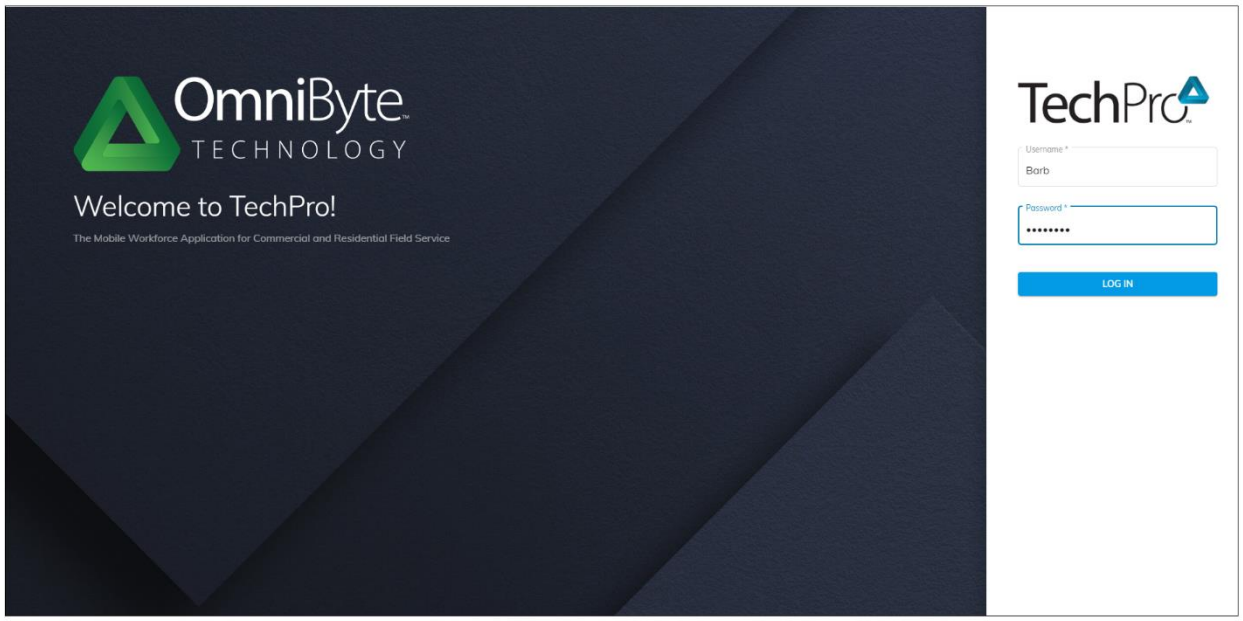
Technicians can add equipment to a work order from the mobile app. Unlike when adding equipment to a work order in the back office, a default task does not appear in the mobile app. In most cases, you'll have a separate process for servicing the newly added equipment, and the default task serves no purpose for the technician. However, after the appointment is checked out, you will see a default task in the Service Call Tasks window with a COMPLETE status.

Using the Administrator Site

The TechPro administrator site contains all the components needed for setting up and maintaining the TechPro mobile application.

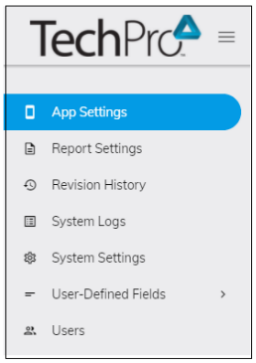
Log In

Logging in to the admin site requires a username and password for a TechPro administrator account. The Active Directory (AD) group for TechPro administrators is specified during the install process.



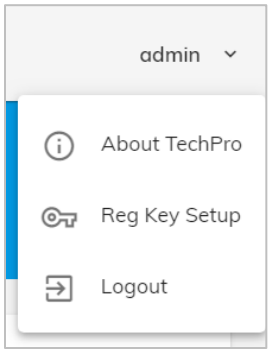
Admin Site Menu

The menu in the upper left-hand side of the TechPro admin site provides you with the navigation to get to the following pages: App Settings, Report Settings, Revision History, System Logs, System Settings, User-Defined Fields, and Users.



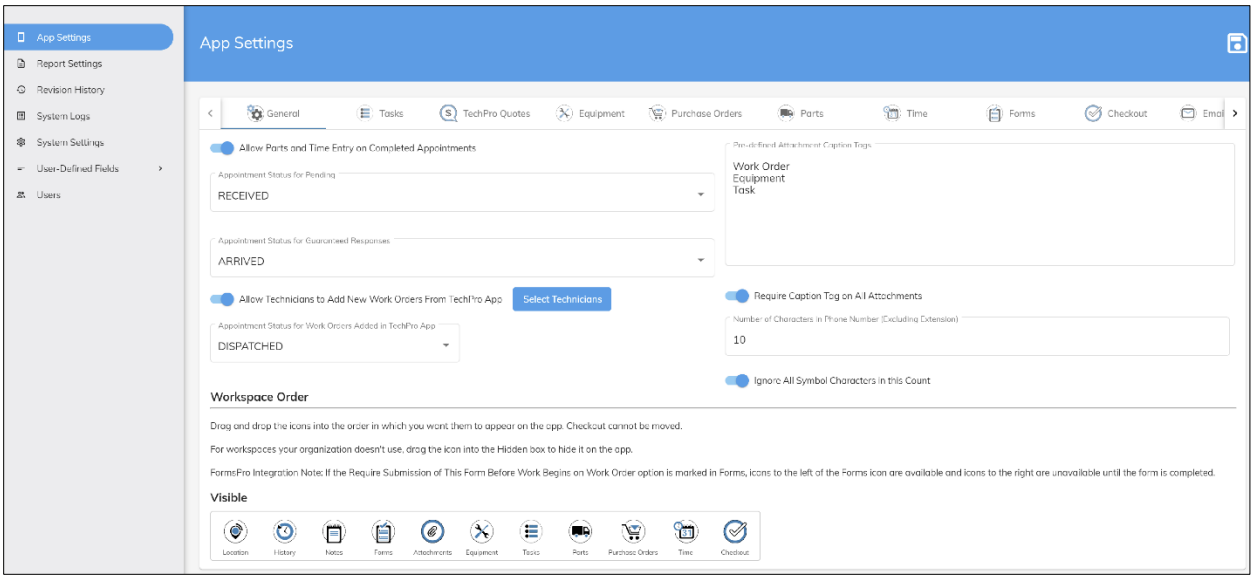
Logout

Click Logout in the top right-hand corner to exit the admin site and return to the log in page.



App Settings

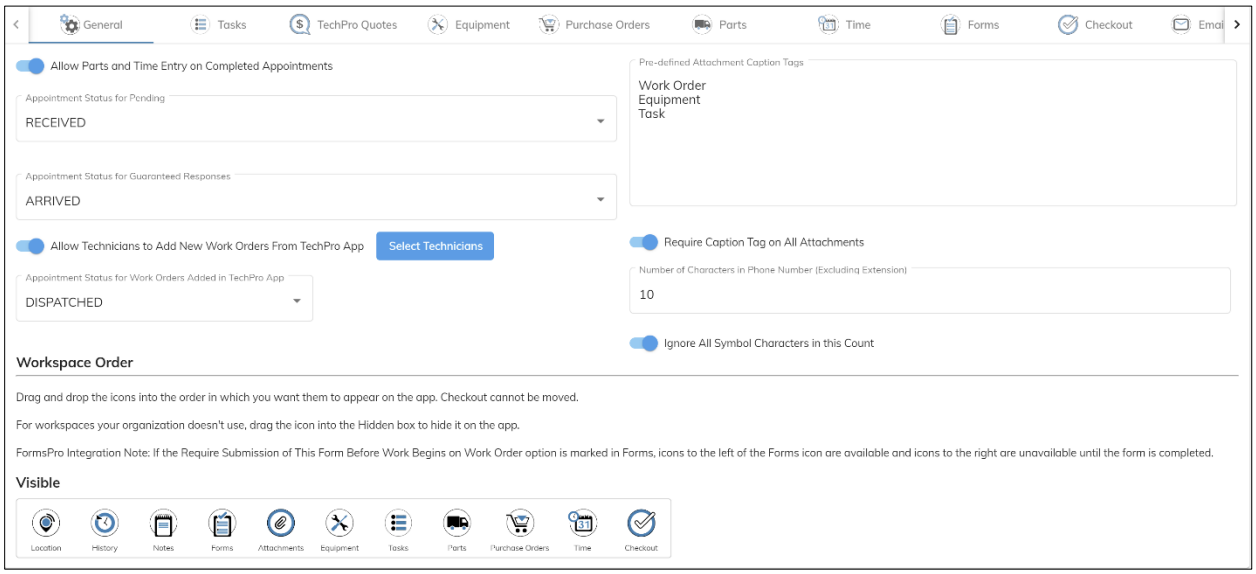
The App Settings page contains the tabs to set up the mobile app's workspaces. This page saves the settings for all TechPro users. Options are categorized by where they are used in the mobile app. Be sure to click **Save** when you've completed your entries on each tab. Open the App Settings page by clicking **App Settings** from the menu on the left.



General

Use the General tab to specify appointment settings, set the order of the app's workspaces, and arrange fields in the workspaces and appointment listings.

1. From the menu on the left, click **App Settings**, then **General**.



2. Toggle the **Allow Parts and Time Entry on Completed Appointments** option on to allow the entry of additional parts and time on a completed appointment. If this toggle is off, completed appointments *do not* appear on the device. The history of completed appointments for a customer remains available in the History workspace.

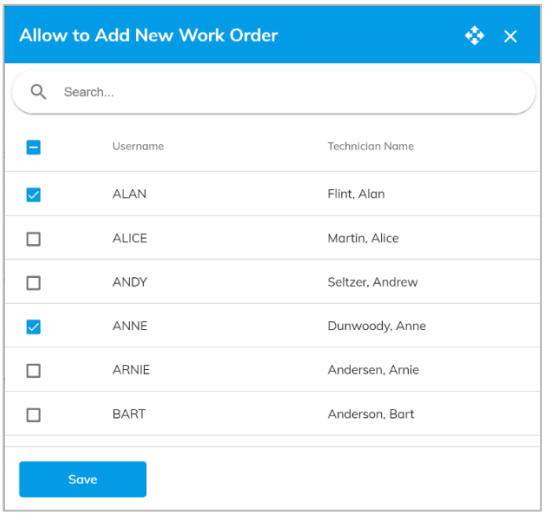
3. From the **Appointment Status for Pending** list, select the status in your back office to represent appointments that are pending (on hold) in the mobile app. The heading in the app continues to display "Pending" but appointments with this status appear in that section.

4. If you use guaranteed times for responses from your technicians to a call, from the **Appointment Status for Guaranteed Responses** list, select the appointment status. This status is used to indicate call urgency based on the time the call was created compared to the guaranteed time to show that the guaranteed time is met.

    - This status must be marked to “stamp” time in the Appointment Status Setup window (Signature > Setup > Lookup Setup > Service > Appointment Status) and be set up on the service level to show the urgency of the appointment for calls with service-level agreements (SLAs).
    - If you don’t use SLAs, leave this field set to None.

5. Toggle the **Allow Technicians to Add New Work Orders from TechPro App** option on if your technicians can create calls from the field. This is useful for weekend or after-hours when a technician is on call, and you have no separate dispatching.

    When using this option, click **Select Technicians** to open the Allow to Add New Work Order window.



    Mark the technicians that you want to have the ability to add a work order in the TechPro app. An Add Work Order option is added to the menu for the technician in the TechPro App. Any unmarked technicians will not see this option.

6. From the **Appointment Status for Work Order Added in TechPro App** list, select a status for the work orders added from the TechPro app. This ensures the call appears on the app and the technician can complete the call.

    - All work orders added from the TechPro app are handled as time and materials calls, although the specific call type is not assigned.
    - This feature requires online connectivity. If a technician is out of a service area, they cannot create a work order, even if they have permissions to do so.
    - See [Working with Submitted Appointments in the Back Office] for additional details about calls added from TechPro.

7. In the **Pre-defined Attachment Caption Tags** field, enter caption tags to use when adding attachments to equipment and task records. For example, you may have technicians that have to perform weekly safety inspections. You could create an attachment caption of “Wkly Safety Insp.” Then when the technician takes a picture of the equipment that was inspected and attaches it to a record, they simply select “Wkly Safety Insp” as the caption tag.

   Toggle the **Require Caption Tag on All Attachments** option on if you want to require that technicians must select a caption tag for their attachments on all workspaces that you can add attachments. If this option is unmarked caption tags can still be used, if they are set up, but are not required for leaving the attachment workspace.

8. In the **Number of Characters in Phone Number (Excluding Extension)** field, enter the number of characters to use in a phone number. The TechPro app will display the phone number with the number of characters entered here. Any characters that are remaining after this count is reached are truncated and won’t be shown in TechPro, and therefore not dialed.

   Toggle the **Ignore All Symbol Characters in this Count** option on to specify whether special characters, such as + at the front of a number, is included in the number of characters.

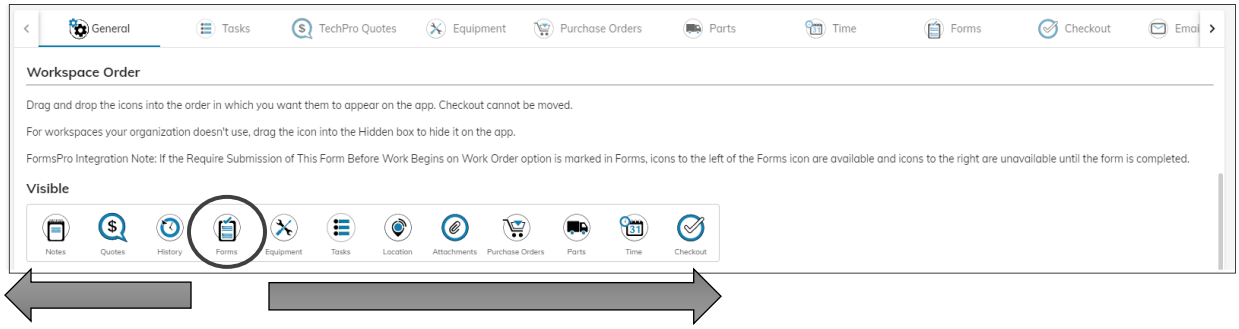
9. Drag and drop the icons in the Visible bar in the order you want them to appear in the app. The only icon that *cannot* be moved is Checkout.

   Changes made here apply to all technicians using the TechPro mobile app.

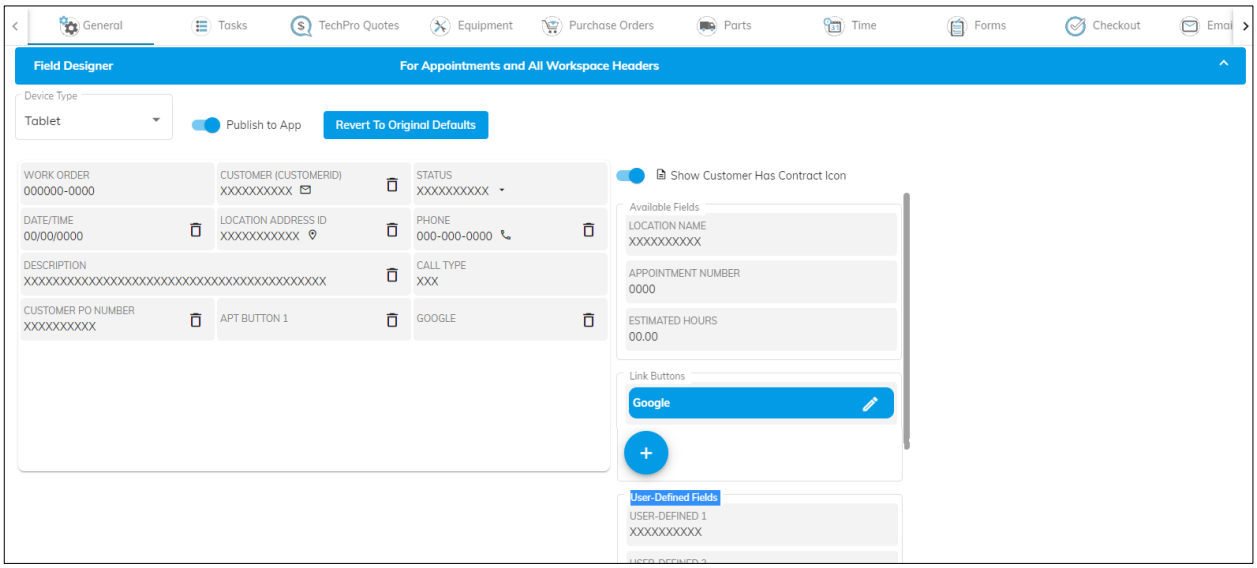
   Any workspaces your organization does not use can be moved into the Hidden bar, and the icon won’t appear on the app. For example, if your organization doesn’t track inventory parts used by technicians, you can move the Parts icon into the Hidden bar, and the Parts workspace will no longer be available on the app. Any other options you set in the admin site for workspaces that are hidden are maintained, but are not functional from the app. That way, if you want to move the workspace back, you won’t need to reset those options.

   When the **Require Submission of This Form Before Work Begins on Work Order** is marked for any form on the Form Options window, the icons to open workspaces to the right of the Forms icon will be locked until the form has been submitted from the app.

   The placement of the Forms icon determines the available and locked workspaces in the app when using this feature. In the following example, Notes, Quotes and History (to the left of Forms) are available for reference information for the technicians; while the remaining icons to the right are locked until the required form has been completed. You can move the icons to the location that works best for the technicians in your organization.



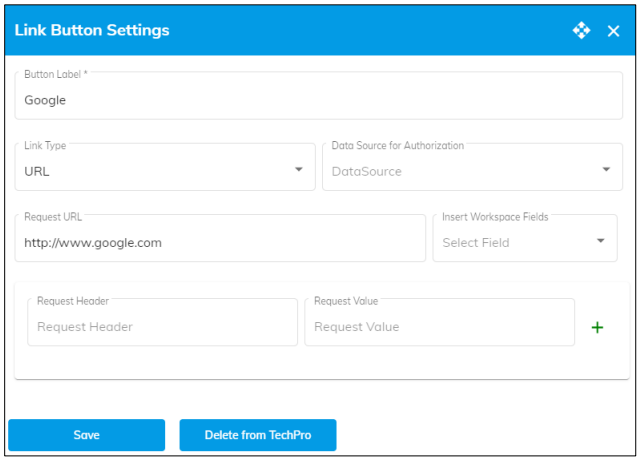
10. The Field Designer is available for adding, rearranging, and removing fields from the Appointments list and workspace headers. See the [App Configuration using User Defined Fields and the Field Designer] section for information about the Field Designer.



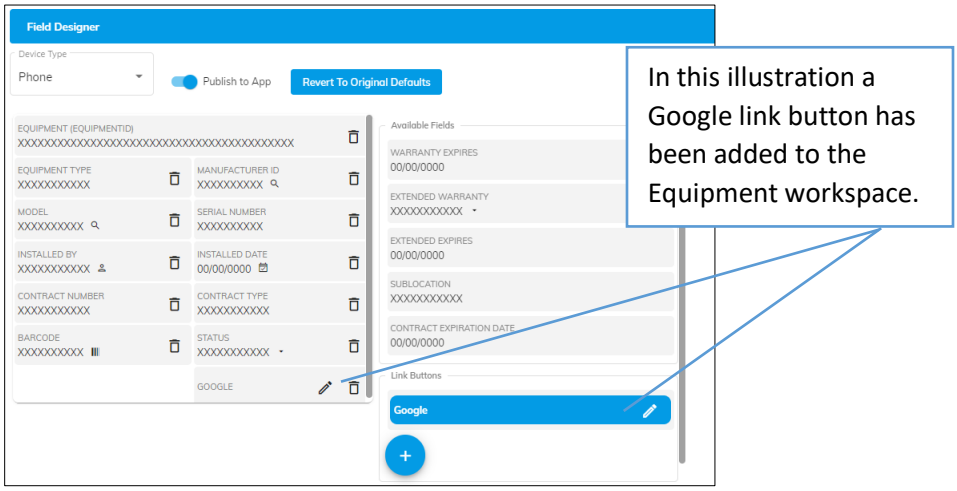
Setting up a Link Button

The Link Button Settings window is used to set up and edit the settings for a link button.

1. From the menu on the left, click **App Settings**, then **General**. Scroll down to the Field Designer area and click the floating add button under the Link Buttons heading.



2. Enter a label to identify the button that is being set up. This is the text you want to display on the button.
3. Select the type of link button you are setting up. Options include:
    - HTTP Request POST
    - HTTP Request PUT
    - HTTP Request DELETE
    - HTTP Request PATCH
    - URL
4. From the **Data Source for Authorization** field, select the data connection you want to use for the link. The data connection contains the authorization information for the link (this is not applicable for the URL link type).
5. In the **Request URL** field insert the URL for the link.
6. Select the fields you want to insert into the workspace fields. For fields that are doubled up (such as Customer ID and Customer Name) each needs to be listed independently.
7. Enter the request header and value (this is not applicable for the URL link type). If the data source authorization is entered as part of the request header, it overwrites the one in the Data Source for Authorization field.
8. The **Request Body** section lists the fields in the workspace, including header fields, if designing for equipment or parts. The first checkbox is the name of the workspace, such as Equipment Workspace. The remaining checkboxes are those that you can include in the request. Rename the text as needed.
9. Drag the link button(s) onto the design area.
10. Save the link information.

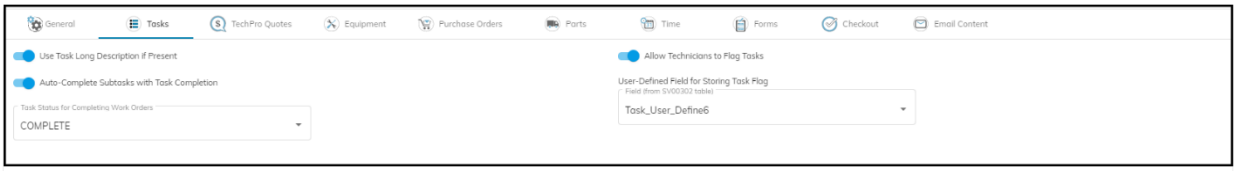


Click **Delete from TechPro** to completely remove the link from TechPro. This button is unlike the trash icon that just removes it from the design and places it in the Link Buttons box.

Tasks

Use the Tasks tab to specify the settings that help a technician complete the work required for a service call.

1. From the menu on the left, click **App Settings**, then **Tasks**.



2. Toggle the **Use Task Long Description if Present** option on to replace the task description with the long task description when one is entered in Signature's Task Code Setup window. If the Long Description field is blank, the entry in the Task Description field is used.

   The Task Long Description field is not in the Task Code Setup window as part of the standard Signature product. It must be added using the Alternate/Modified Forms and Reports window. The Task_Long_Description field is stored in the SV00506 table.

3. Toggle the **Auto-Complete Subtasks with Task Completion** option on to automatically mark all subtasks complete when a task is marked complete in TechPro. If it is important for techs to individually complete any of the subtasks on a task, leave this option off.

4. From the **Task Status for Completing Work Orders** list, select a task status to set in the back office when a task is not marked complete in TechPro, but all appointments on the work order are complete. This option is useful because in TechPro, tasks have two statuses: complete or not complete. Your back-office solution may have more than just those two task statuses. To provide you with the best integration to your back office, this option provides you with the setting you want to use. Any of the task statuses you have in your back office appear in the list, as well as a "No Change" option which leaves all your tasks as is.

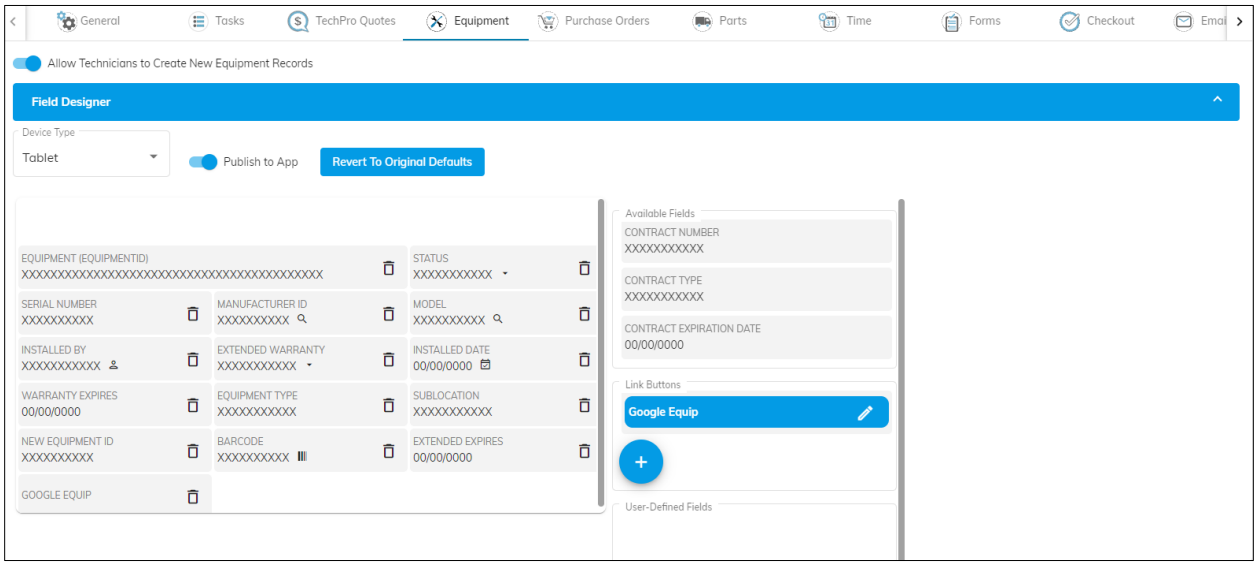
5. Toggle the **Allow Technicians to Flag Tasks** option to add a Flag checkbox to all tasks in the Tasks workspace. This allows a technician to flag a task for something like non-compliant equipment. For example, a technician is inspecting a fire door and notices the light is burned out on the Exit sign. The inspection fails, so the technician marks the Flag checkbox on the Tasks workspace to indicate the equipment is out of compliance.

6. From the **User-Defined Field for Storing Task Flag** list, select the user-defined field that is used to store the value of the Flag checkbox when marked. The user-defined field is used to display the flag on task equipment and the task on subsequent appointments until it's unmarked. This field comes from the Task (SV00302) table in Signature.

Equipment

The Equipment tab provides a Field Designer for adding, rearranging, and removing fields from the Equipment workspace.

1. From the menu on the left, click **App Settings**, then **Equipment**.



2. Toggle the **Allow Technicians to Create New Equipment Records** option off if you do not want technicians to be able to create a new equipment record. When this option is turned off, the Add button on the Equipment workspace is hidden.

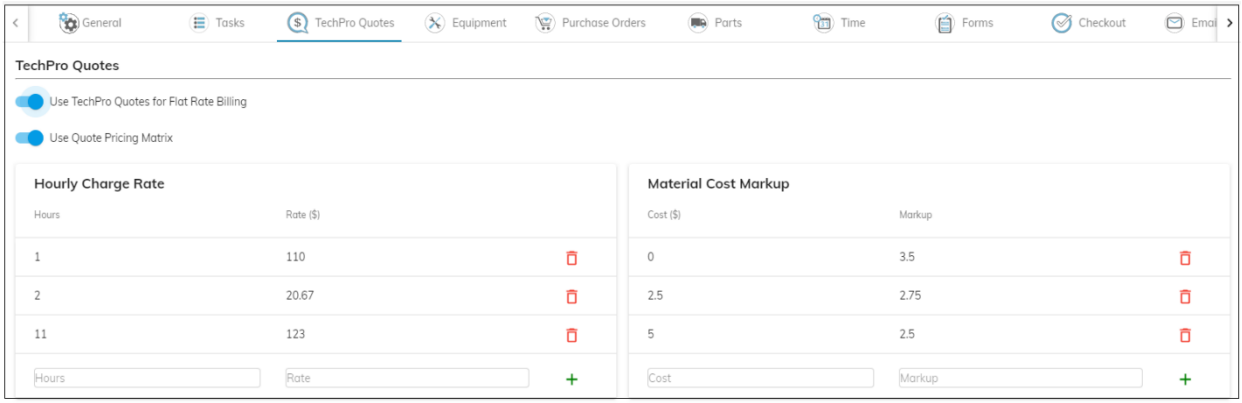
   If you do not use auto-numbering for new equipment (set up in Signature), we recommend that you turn this option off and contact OmniByte support. The ability to add equipment to a service call or job is not impacted by this setting.

3. See the Setting up a Link Button and the App Configuration using User Defined Fields and the Field Designer sections for information about this section.

TechPro Quotes

The TechPro Quotes tab is used to specify settings for TechPro quotes.

1. From the menu on the left, click **App Settings**, then **TechPro Quotes**.



2. Toggle the **Use TechPro Quotes for Flat Rate Billing** option on to use the Quote workspace for all quotes and billing. When this toggle is on, the Quote workspace is available, and billing information appears on the Checkout workspace. Contract billing for maintenance contract computer-generated

(MCC) and maintenance contract (MC) calls are used if this option is marked, and the Quote workspace is not available for those types of calls.

If the Quotes workspace is in the Hidden box on the General settings tab, you will not be able to save the Use TechPro Quotes for Flat Rate Billing option on.

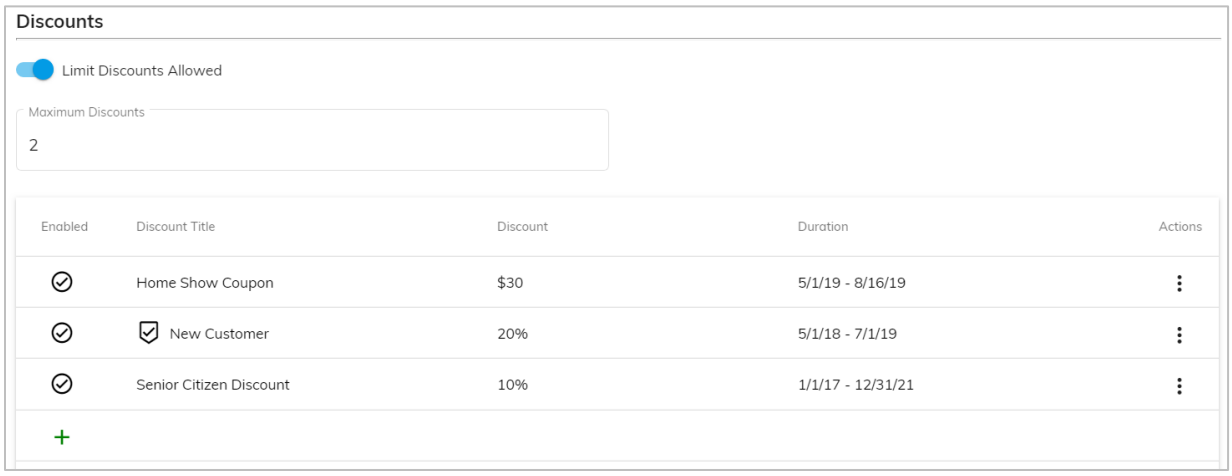
If you are not using this option, the call type and quote information entered for the work orders in the back office is used. The Quote workspace and billing amounts do not appear on the Checkout workspace.

3. Toggle the **Use Quote Pricing Matrix** option on to use a quote pricing matrix for calculating the hourly price of labor or cost markup for items when using the Quote workspace. (You must have the **Use TechPro Quotes for Flat Rate Billing** option on for these fields to be available.) You can add lines of rate information by clicking the Add button. The Add button appears at the bottom of the list until you've completed the line, then it will fall into place in the sequence of information. Click the Delete icon to delete a row of information.

Work Order Discounts

The Discount section is used to add, delete, or disable discounts that can be used on a work order, if you have the **Use TechPro Quotes for Flat Rate Billing** option on. You can also set a default discount for contract customers.

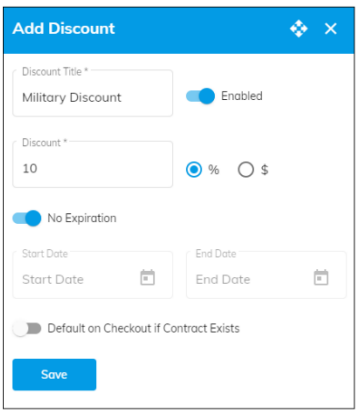
Discounts are disabled if you do not have the **Use TechPro Quotes for Flat Rate Billing** option marked, since these discounts apply only to TechPro quote amounts.



1. Toggle the **Limit Discounts Allowed** option on to limit how many discounts you can apply to a work order.
2. In the **Maximum Discounts** field, enter the maximum number of discounts to apply to a work order. (An unlimited number of discounts can be set up. This limits only the number that can be applied in the app.)

Add Discounts:

1. Click the add icon in the lower-left corner of the Discounts section to open the Add Discount window.



2. Enter a discount title.
3. Select whether the new discount reduces the amount owed by a dollar amount or a percentage, then enter the value for the discount. Discount amounts are applied during checkout in the app.
4. Set a date range for the discount to be valid. If you don't want to expire this discount toggle the **No Expiratio**n option on. Expired discounts are not deleted. In the app, the technician is warned if a discount has expired, but it can still be used.
5. Optional: Select to use the **Default on Checkout if Contract Exists** option for this discount. This applies this discount automatically for those customers who have a contract. If another discount is currently marked as default, the new discount replaces the existing discount as the default.

   The icon in the list of discounts indicates the default discount.
6. Click **Save**.

   To delete a discount, select **Delete** from the Actions menu in the discounts table.

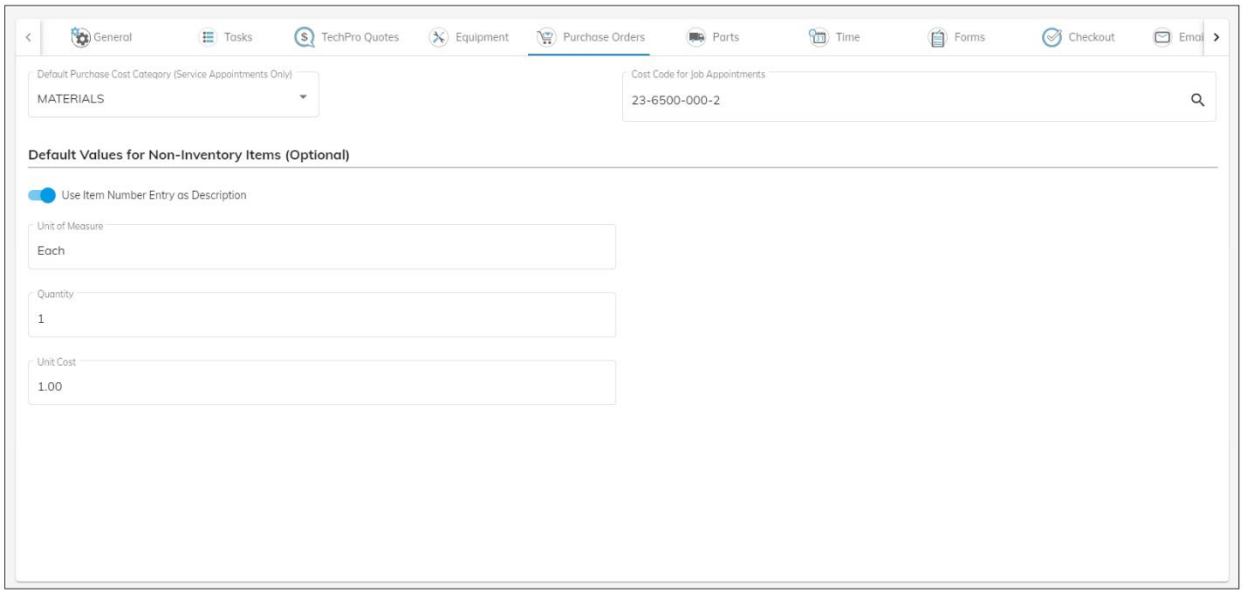
Disable/Enable Discounts:

1. To disable or enable a discount, click **Edit** from the Actions menu to open the Edit Discount window.
2. Toggle the **Enabled** option on or off. If a discount is disabled, it does not appear on the app as a selection.

Purchase Orders

The Purchase Orders tab is used to specify settings so that technicians can create a purchase order for items purchased on the current appointment.

1. From the menu on the left, click **App Settings**, then **Purchase Orders**.

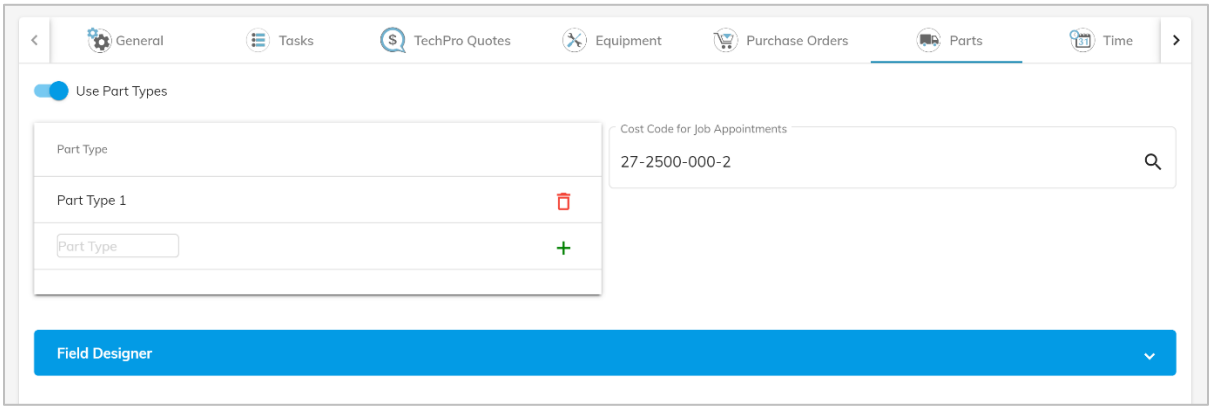


2. From the **Default Purchase Cost Category (Service Appointments Only)** list, select the default cost category to use for purchase order lines. The cost types set up in the back office appear in the list. This setting applies to service appointments only; Job Cost uses different data for their cost codes. The option selected here appears as a default for both inventory and non-inventory items, and can be changed on a line-by-line basis using the mobile app.
3. Enter a cost code in the **Cost Code for Job Appointments** field that is used on all purchase orders entered using TechPro, since those aren't assigned at the appointment level in Signature. The cost code you assign must be on the job. Therefore, master cost codes are assigned here, as they are more universal to the job cost system. If you aren't using master cost codes, you must set up at least one for this purpose. (The same cost code can be used for parts and purchase orders.) If it is not on the job, the checkout generates an error, and you need to add it in the back office before reprocessing the checkout. If your technicians never enter purchase orders on job appointments, you can leave this field blank.
4. Toggle the **Use Item Number Entry as Description** option on to automatically populate the item description with the same entry as the item number for non-inventory items on the Purchase Orders workspace.
5. Enter a default **Unit of Measure, Quantity,** and **Unit Cost** to be used when entering non-inventory items in the Purchase Orders workspace. These defaults speed up user entry. If you prefer that technicians enter data rather than accepting or overwriting a default, leave any or all these fields blank; they are required on a purchase order line.

Parts

The Parts tab is used to specify settings so that technicians can record the parts from their assigned inventory sites on an appointment.

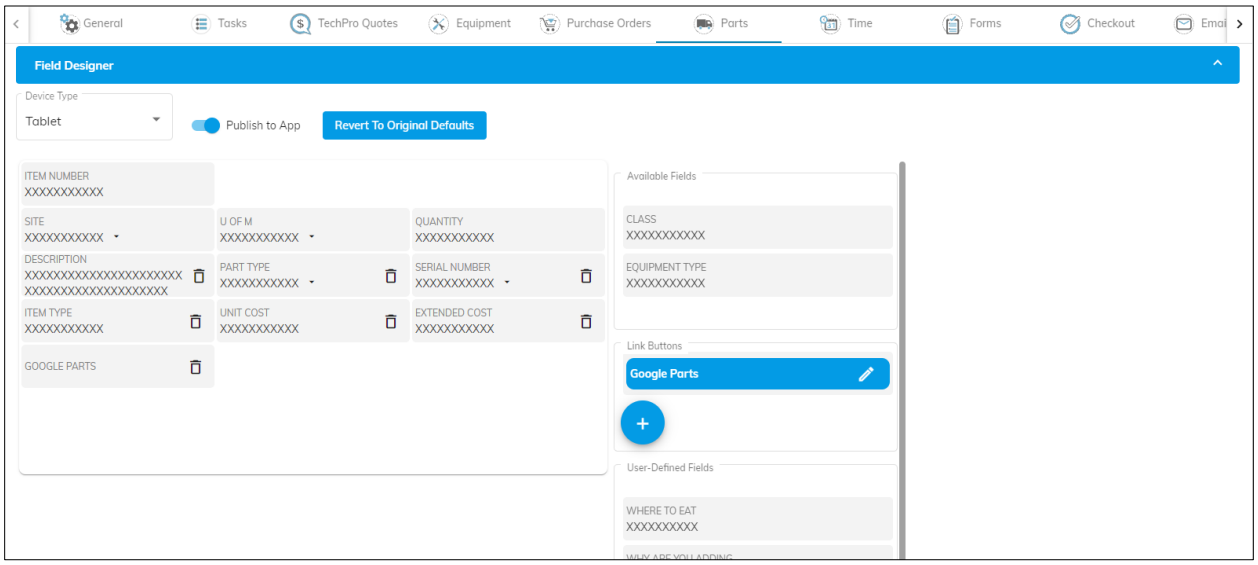
1. From the menu on the left, click **App Settings**, then **Parts**.



2. Toggle the **Use Part Types** option on to populate the Part Type drop-down list on the Parts workspace. Multiple options can be added by adding a name and clicking the Add button. This information can be used for reporting.

3. Enter a cost code in the **Cost Code for Job Appointments** field to use on all parts entered using TechPro, since those aren't assigned at the appointment level in Signature. The cost code you assign must be on the job. Therefore, master cost codes are assigned here, as they are more universal to the job cost system. If you aren't using master cost codes, you must set up at least one for this purpose. (The same cost code can be used for parts and purchase orders.) If it is not on the job, the checkout generates an error, and you will need to add it in the back office before reprocessing the checkout. If your technicians never enter parts on job appointments, you can leave this field blank.

4. The **Field Designer** is available for adding, rearranging, and removing fields from the Parts workspace. See the Setting up a Link Button and the App Configuration using User Defined Fields and the Field Designer sections for information about this section.

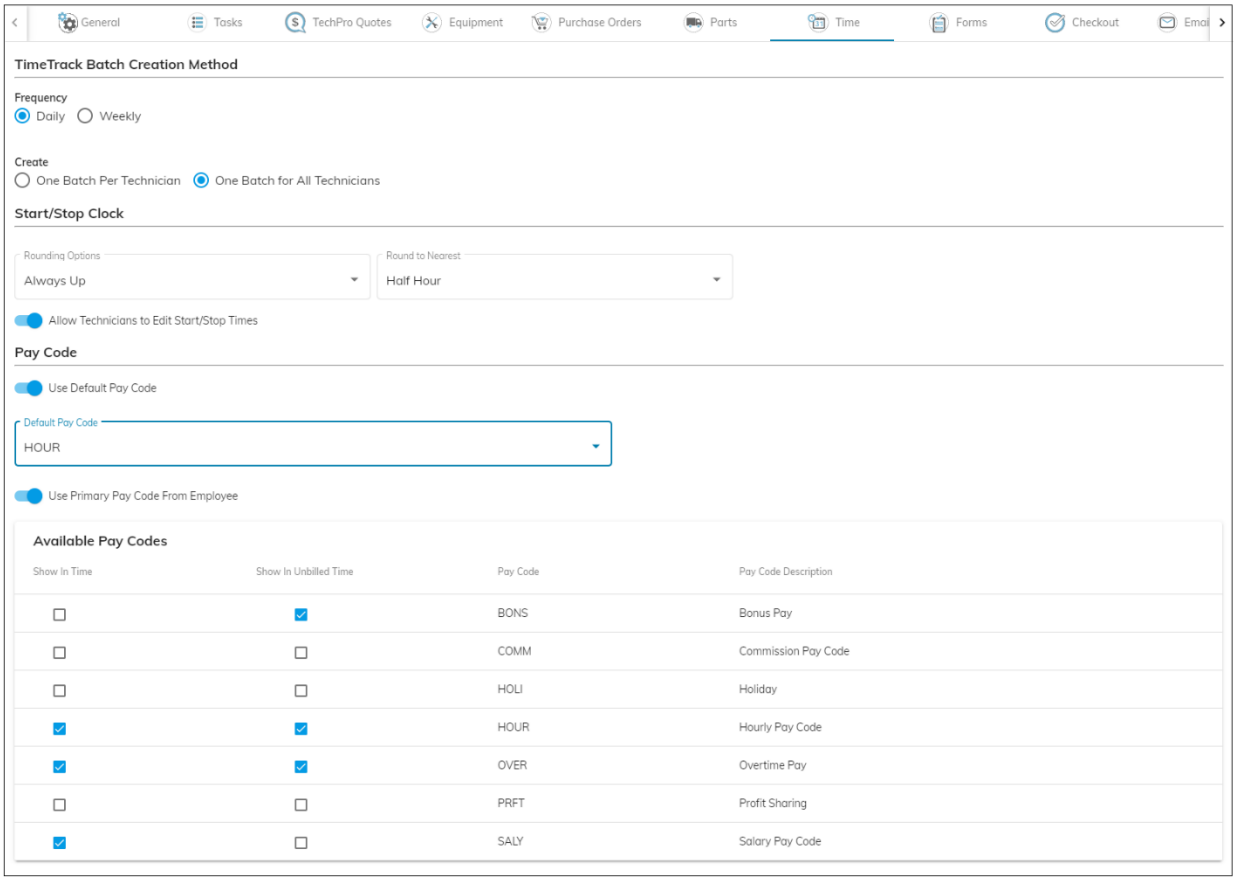


Time

Use the Time tab to specify settings for the Time workspace, such as rounding options and pay code information.

If you use TechPro for service call and job cost appointments, the cost code used for time entries is the one assigned to the appointment when the appointment is set up in Job Cost. On the mobile app, the cost code is visible, but it cannot be edited on the mobile app.

1. From the menu on the left, click **App Settings**, then **Time**.



2. Select how often batches are created in TimeTrack: **Daily** or **Weekly**. Then select how batches are created in TimeTrack: **One Batch Per Technician** or **One Batch for All Technicians**.

   Batch names are automatically named according to the options you set:

Options	Batch name explanation	Example
Frequency: Daily Create: One for All Technician	TPRO_3 Character Day of the week_MMDD	TPRO_MON_1022
Frequency: Daily Create: One Per Technician	TPRO_MMDD_First 5 characters of Technician ID	TPRO_1022_BOBSM
Frequency: Weekly Create One for All Technicians	TPRO_WeekEnding Date	TPRO_1026
Frequency: Weekly Create: One Per Technician	TPRO_Week Ending Date_First 5 characters of Technician ID	TPRO_1026_BOBSM

3. Select the rounding options your Payroll regulations require when using the Start/Stop Clock to record time. The time difference between the start time and end time is calculated automatically and the number of hours is rounded accordingly. Hours are always shown with 2 decimals.

   Be aware of any regulations regarding rounding when selecting your rounding options. TechPro does not validate any regional regulations.

4. Select the hour option for rounding to use if you chose a rounding option.

   The following example shows how time is rounded for each option:

Rounding Options	Round to Nearest	Example: Start time 1:10 End time : 3:50 Exact hours= 2.67 hours
None	Not available	2.67 Hours
Always Up	Quarter Hour	2.75 Hours
Always Up	Half Hour	3.00 Hours
Always Up	Hour	3.00 Hours
Always Down	Quarter Hour	2.50 Hours
Always Down	Half Hour	2.50 Hours
Always Down	Hour	2.00 Hours
Standard*	Quarter Hour	2.75 Hours
Standard	Half Hour	2.50 Hours
Standard	Hour	3.00 Hours

   *Standard rounding uses the halfway point for the Round to Nearest selection to determine rounding up or down. Exactly half will round up.

   Manual time is *not* rounded-it remains as entered with 2 decimal places.

5. Toggle the **Allow Technicians to Edit Start/Stop Times** option on to allow technicians to edit the start, stop or both times in the app. The Hours field in the app is recalculated based on the rounding options and cannot be changed manually. If this option is not on, you cannot edit the start and stop times.

6. Toggle the **Use Default Pay Code** option on to set the default pay code which appears in the Time and in the Unbilled Time workspaces of the mobile app. Then select a default pay code that is used most often for all technicians. This is helpful when your technicians are unsure of which to choose. This can be changed in the Time or Unbilled workspaces as needed if other pay codes are available.

7. Toggle the **Use Primary Pay Code From Employee** option on when your employee records in Payroll have a primary pay code marked. This is most useful when you have technicians with different pay codes by department or skill set, and/or when the default pay code for all employees wouldn't provide an accurate pay code for some individual technicians.

   When both pay code default options are on, the primary pay code from the employee is used as the default when it's different than the default pay code.

8. The **Available Pay Codes** section displays the pay codes you have set up in the back office. Mark the pay codes in the appropriate column to show in either the Time workspace or Unbilled Time

workspace, or both. If that pay code is assigned to the technician, the technician can select it in the app. This helps limit the list of pay codes to only those that are applicable to the technician and to the workspace they're using. Any pay codes you leave unmarked do not appear in TechPro.

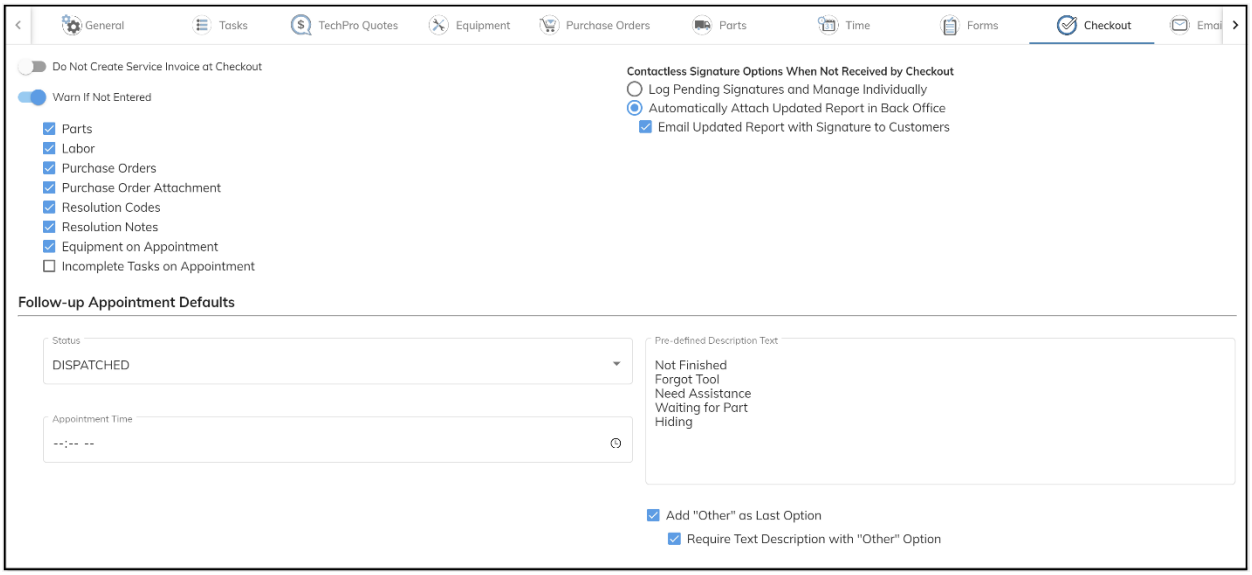
Forms

The Forms tab is only available if the FormsPro API settings are first configured in FormsPro API Configuration. If you are using the integration between TechPro and FormsPro, there are a few setup items you must complete before the two products work together. This information is covered in a separate section called Integrating TechPro and FormsPro.

Checkout

Use the Checkout tab to maintain the settings in the Checkout workspace.

1. From the menu on the left, click **App Settings**, then **Checkout**.



2. Toggle the **Do Not Create Service Invoice at Checkout** option on to send all costs to the back office, but an invoice number is not reserved for the work order and saved in a batch. You can then invoice the work order according to your regular business processes.

   If the option is toggled off, the next number for service/repairs in Receivables Management is saved for the work order in a Receivables batch named TECHPRO. If you delete the batch on the service invoice, the invoice number is unreserved and becomes available for another invoice. This may affect the sequence of your service/repair document numbers.

   This option is available only if the **Use TechPro Quotes for Flat Rate Billing** (located on the TechPro Quotes tab) option is toggled off. It does not affect MC or MCC calls.

3. Toggle the **Warn If Not Entered** option on for the system to check that either an entry has been made in the workspace, or the technician has marked that option as not needed during checkout for various transactions and workspaces. If one or the other is blank, the technician cannot check out until one is completed.

If this option is marked, select which types of workspaces/items must be completed prior to checkout. You can select any or all the options. If this option is left off, no checks for the workspace or type is done at checkout. If the **Purchase Order Attachment** option is selected, all purchase orders on the work order are checked, and notify the tech if purchase orders need an attachment before they can check out. If this option is not marked, the tech can check out regardless of any purchase order attachments. If the **Equipment on Appointment** option is selected, a warning is issued if no equipment has been entered on an appointment. If the **Incomplete Tasks on Appointment** option is selected, an All Necessary Tasks Completed checkbox is added to the Verifications section of the Checkout workspace. Technicians need to mark this box to indicate that any tasks left incomplete are OK to be left unmarked. Otherwise, a technician needs to complete the task and mark it complete to submit their checkout.

Resolution codes are not available for job appointments.

4. Specify how to handle contactless signatures received after a technician completes a checkout:

   Select **Log Pending Signatures and Manage Individually** to manage each contactless signature received after a checkout individually.

   Select **Automatically Attach Updated Report in Back Office** to automatically attach an updated work order report to the work order in the back office. If you want to send an updated email with the signature to the customer, mark the **Email Report with Signature to Customer** option.

   The **Email Report with Signature to Customer** option is used for *all* customers and *all* received signatures. You will not be able to select to whom you want to resend.

5. Select the status for the follow-up appointment that is created.

6. Enter a time that appears as the appointment time on the follow-up appointment. If you use a dispatch board, it may be helpful to enter a time inside of regular hours so that it is easier to find as you scroll through dates on the board. This can be left blank which simply provides no default for the technician on the mobile device. The separate option for emailing is used for all customers and all received signatures. The user won't be able to pick and choose which they want to resend to. If that's important, they should use the manage individually option. When marked, we will re-send the same email that was sent at the original checkout with the signature on the report. It will be sent to the same individuals as the original checkout. If the email fails, it goes back around through the error and reprocess checkout circuit but keeps the received signature intact.

7. Enter optional pre-defined descriptions that will appear in a list for the technician to choose the one that most closely matches the reason a follow-up call is needed. Enter each description on a new line in the box.

   Leaving this blank leaves a text field in the mobile app for the technician to enter a description in their own words.

   The appointment description is not a field that appears on the device. You can add it using a user-defined field, but it is on the appointment in the back office. Appointment description fields in the back office are restricted to 51 characters. Anything over 51 characters entered here or on the device overflows using the appointment note, much like the call description does.

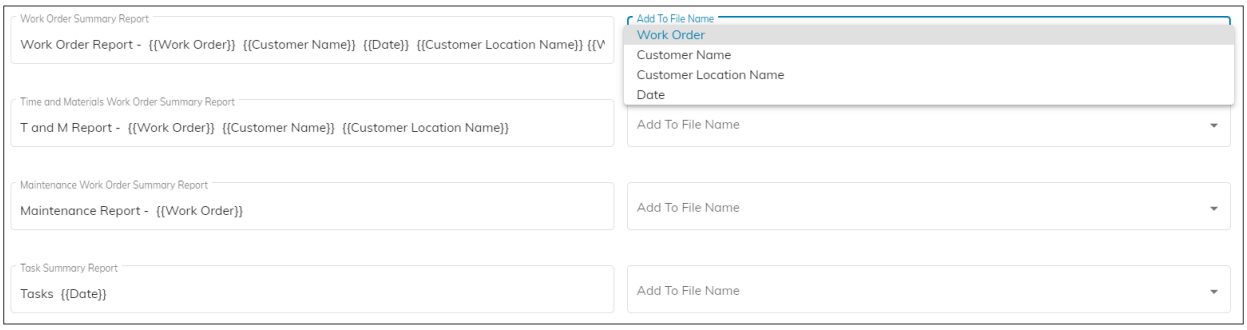
8. Mark **Add "Other" as Last Option** to automatically insert an option named "Other" in the mobile app as the last pre-defined description. This can be used if no option provided meets the description of the appointment. When Other is selected on the mobile app, another text field appears for the technician to enter a description that meets the situation. The word "Other" appears with this description in the back office.

9. Mark **Require Text Description with "Other" Option** to require that when the technician chooses Other as the description, additional text for describing an "other" situation is entered to check out.

10. In the **Disclaimer** field, enter text that appears in the Customer Review window from the Checkout workspace and in the contactless signature webpage that is sent to the device.

11. In the **Work Order Summary Report Message** field, enter text to print at the bottom of the work order summary reports. The work order summary reports differ depending on the call type, but the same message appears regardless of type. The reports include Work Order Summary Report, Time and Materials Work Order Summary Report, Maintenance Work Order Summary Report and Task Summary Report.

12. You can rename each summary report, as needed. It might be helpful to include the service date in a report name. Then select any work order fields you want to add to the work order summary report names. The work order fields include Work Order, Customer Name, Customer Location Name, and Date. This information can then be printed on the PDFs sent to the customer.



Checkout Field Designer

There may be options on the Checkout workspace that you do not use. The Checkout Field Designer allows you to remove, rearrange, and add user-defined fields to the Checkout workspace to fit your business needs. Detailed information about how the sections and fields are used in the app can be found in the Checkout workspace section.

The Checkout Field Designer includes the following sections: Forms, Cost and Labor Totals, Follow-up Appointments, Verifications, Resolution, Quote and Totals, Signatures, and Emails.

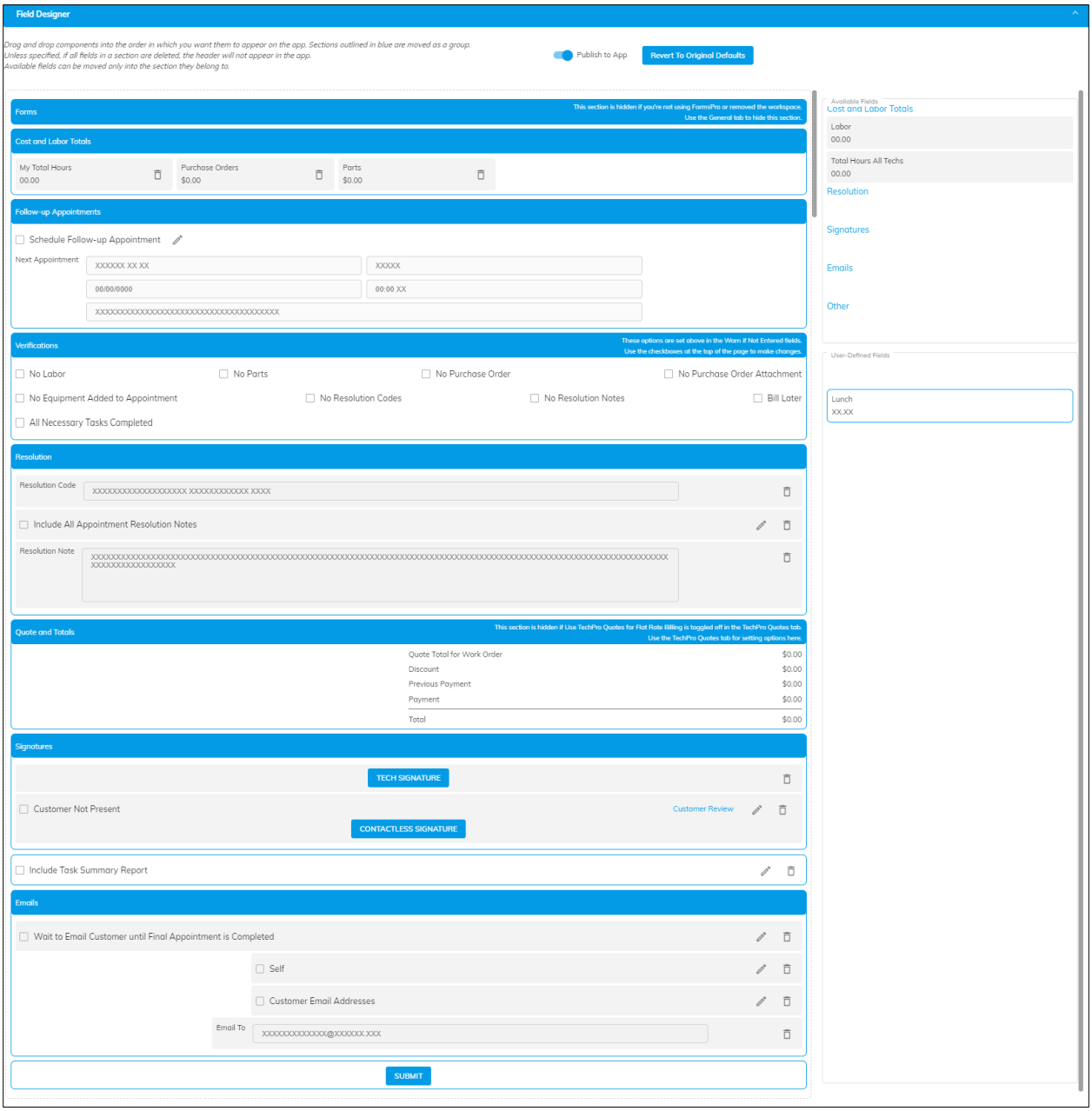
With the Checkout Field Designer, you can:

- Rearrange Sections: Any sections (indicated with a blue outline) can be moved up or down.
- Add Fields**:** Drag and drop any field from the Available Fields or User Defined Fields list onto the design space to add fields to the Checkout workspace. You can only add fields to their appropriate sections. For example, the Purchase Orders dollar amount can only be added to the Cost and Labor Totals section.

- Remove Fields: Click the Delete icon to remove a field from the Checkout workspace. The field will appear in the Available Fields list so it can be added later, if needed. Fields that cannot be deleted because they contain pertinent information for the application to function appropriately do not have a Delete icon. If all components of a section are removed, the header will not appear in the app. For example, if you remove the components from the Signature section there will be no Signature heading in the app.

  Be careful when removing fields so that functionality is not removed. For example, if you remove the customer fields no customer signatures, regardless of contact, will be available.

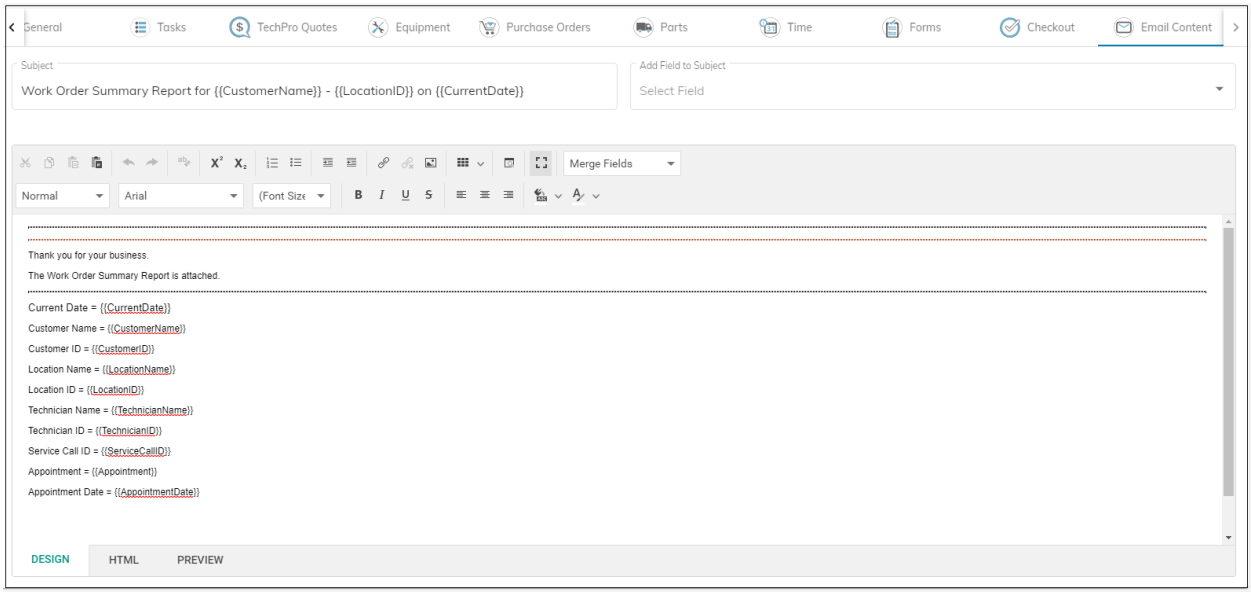
- Rearrange Fields: Any fields that are dark gray can be moved within its respective section.
- Edit Fields: Some checkboxes and fields have an Edit icon. Click the Edit icon to edit certain aspects of a field:
  - Default Marked: Toggle this option on to always display the checkbox as a default.
  - Required: Toggle this option on to make the checkbox required.
  - Locked: Toggle this option on if you don't want a technician to be able to change the default setting. For example, you may want to lock the Customer Email Addresses option to prevent a user from marking or unmarking customer email addresses.



Email Content

The Email Content tab is used to enter text for emails sent from the app to clients or back to the office. This tab is only available if the email server settings are first configured in [Email Setup](#).

1. From the menu on the left, click **App Settings**, then **Email Content**.



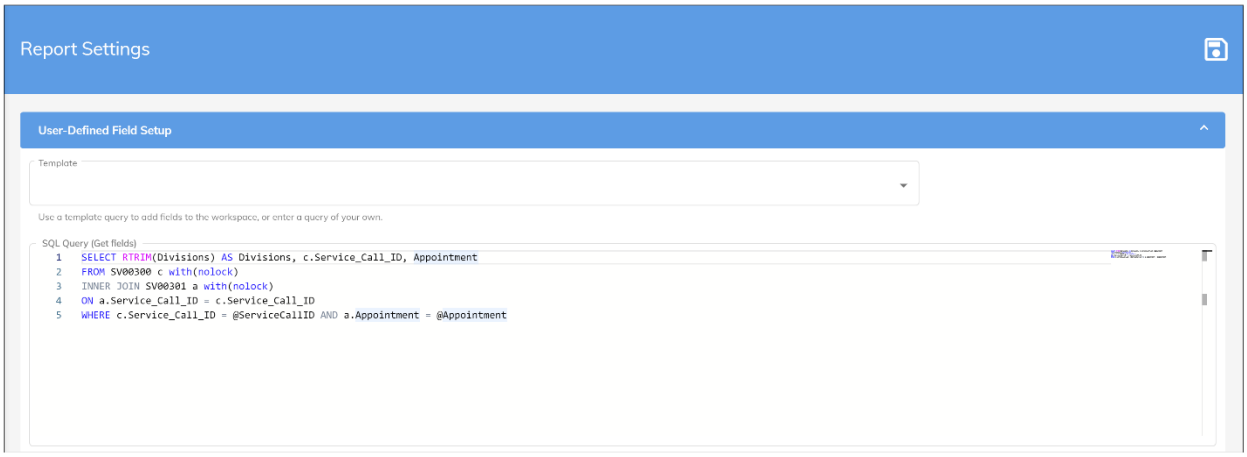
2. Enter a subject which appears on emails from the Checkout workspace, when the Work Order Summary Report is emailed. You can use the **Add Field to Subject** drop-down list to select data fields from the database that will fill in with the appropriate data in the Subject field. For example, selecting {{Customer Name}} inserts the actual customer name in the subject of the email.

3. Enter the body of the email. You can insert data fields in the body of the email using the same method as in the subject.

Report Settings

Use the Report Settings page to create a user-defined field query, then retrieve the fields to create a condition for a specific report. When checking out an appointment, the conditional report is printed and emailed when those conditions are met. If you add a conditional report, the standard Work Order Summary Report will not print.

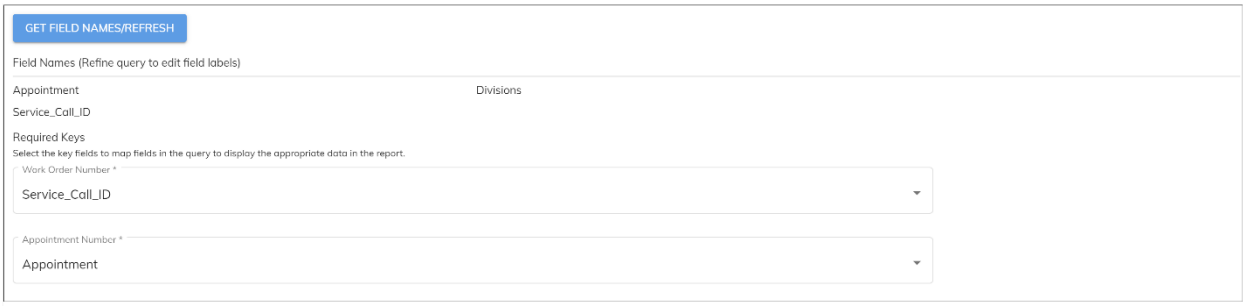
1. From the menu on the left, click **Report Settings**.



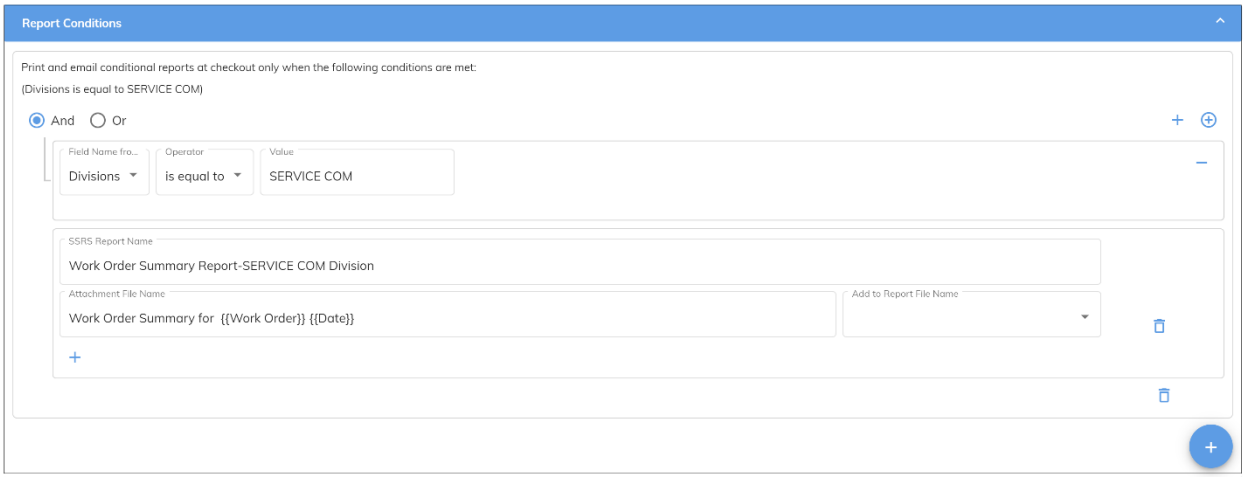
2. Select a template query to help you compose a similar query or compose a query to get the fields you want to use for the report, and edit the template as needed. When composing your query, include key fields from the SV00300 table to retrieve the appointment fields.

   TIPS: Include 'WITH (NOLOCK)' after all tables in your query. By default, in SQL, retrieving data reads only committed data, so the query must wait for data that is being written until it can return. When you use WITH (NOLOCK), this tells it to get data regardless of any other queries that are modifying it. This helps prevent deadlocks and uses less memory; however, it is possible to get a "dirty read," which means that you may read data that is being altered. You also may need to add use an RTRIM function in the Select statement to remove trailing spaces from the string.

3. Click **Get Field Names/ Refresh**. This retrieves the fields from the query and lists them in the Field Names list. Click this button every time you modify the query to refresh the Fields Name list.



4. Use the Required Keys field to map fields in the query to display the appropriate data in the report.

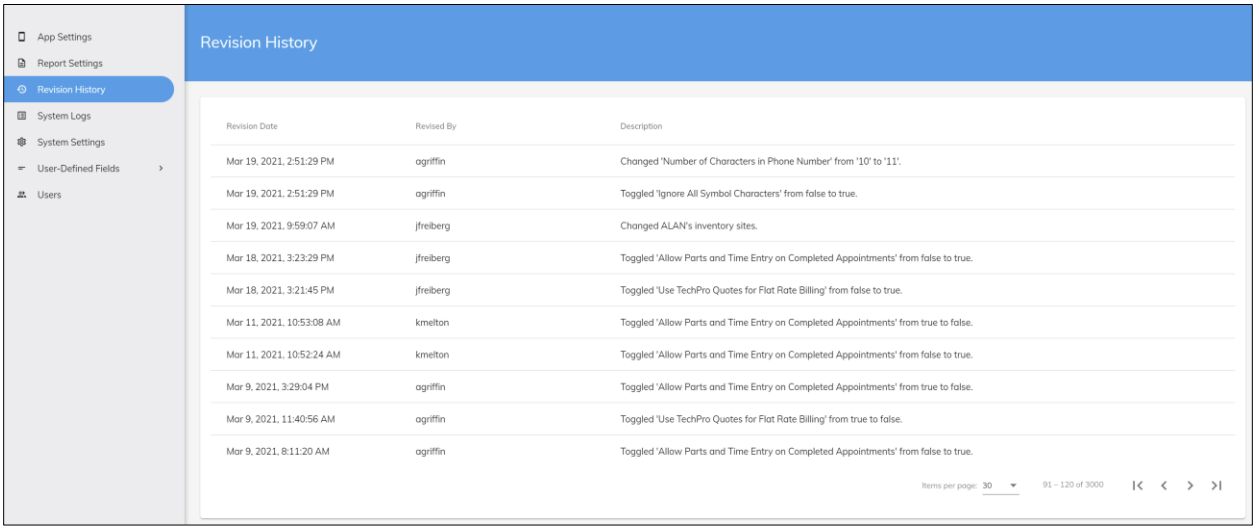


5. Create a condition to retrieve a field from the query and associate the value from which a report will be based.

6. Click **Save**. The report will be printed and emailed when the conditions are met at checkout.

Revision History

The Revision History page reflects all changes made within the TechPro Admin Site.



System Logs

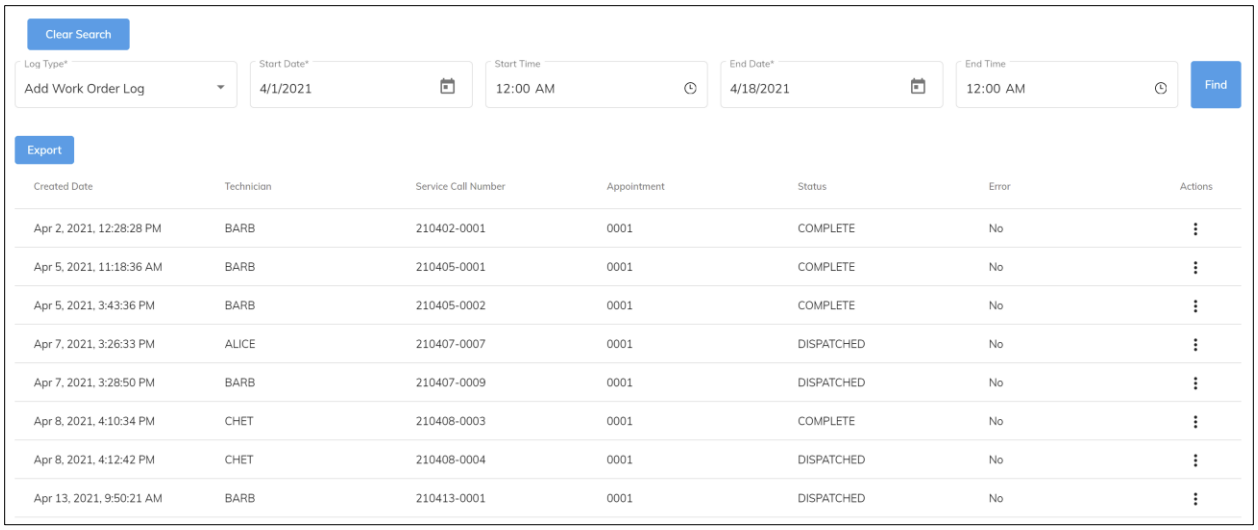
The System Logs page is used to view the TechPro system reports: Add Work Order Log, Checkout Log, Contactless Signature Log, Event Log, Reprocess Checkout Log, and Unbilled Log.

Click **Clear Search** to clear all the search criteria, including the log type. You can also cancel the search process and enter other search criteria. For example, you've entered a month's worth of error logs and it is taking longer than you're willing to wait. Click **Cancel Search** while it is processing to cancel the search. Change the criteria and start over with a smaller range. Or perhaps you clicked Find and realized you've made a mistake and you don't want to wait for search results you do not want.

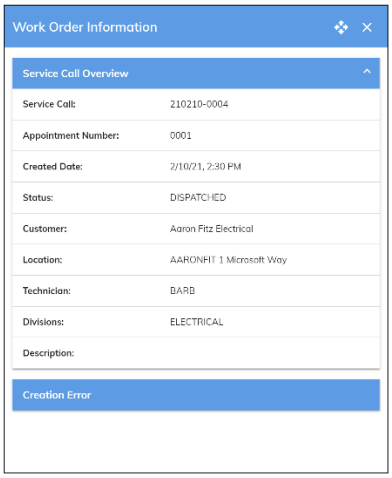
Add Work Order Log

The Add Work Order Log page is where you can view the calls created from the TechPro app. This is useful if you allow technicians to create their own calls when you don't have a dispatcher available. This log provides you with a summary of these calls, whether an error occurred, and additional information that you can use to look up the call in the back office.

1. Click **System Logs** from the left menu and select **Add Work Order Log** from the Log Type drop-down list.



2. Enter a start date and time.
3. Enter an end date and time.
4. Click **Find**.
5. The calls meeting the search criteria are displayed.
6. To view more details about a checkout, click **View** under the Actions menu. The Work Order Information window opens and displays additional information about the call.

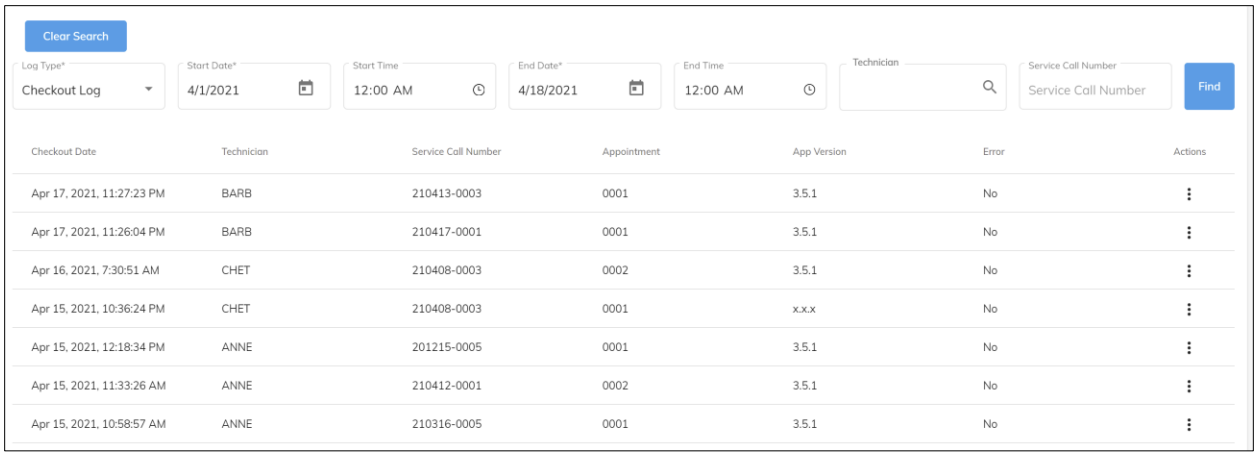


7. Click **Export** if you'd like the call information in a spreadsheet for looking up the information in the back office.

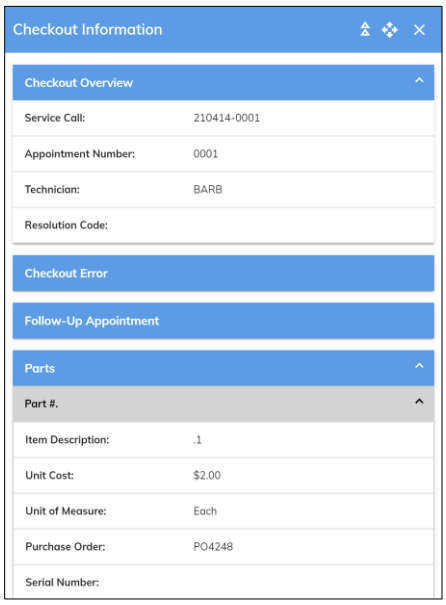
Checkout Log

The Checkout Log page is used to view all the appointments that have been checked out using the mobile app. You can see information entered for the appointments as well as whether the checkout encountered an error.

1. Click **System Logs** from the left menu and select **Checkout Log** from the Log Type drop-down list.



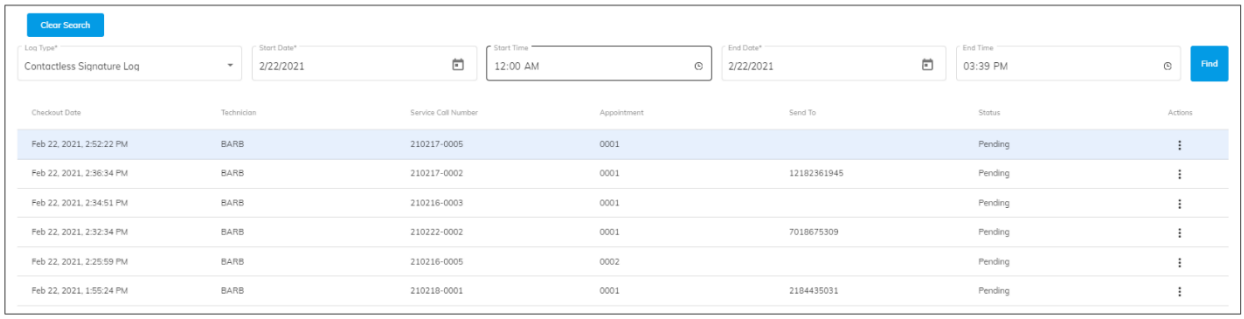
2. Enter a start date and time.
3. Enter an end date and time.
4. Enter a technician ID or service call number to search for a specific checkout record.
5. Click **Find**.
6. The checkouts meeting the search criteria are displayed.
7. To view more details about a checkout, click **View** under the Actions menu. The Checkout Information window opens that displays additional information about the checkout.



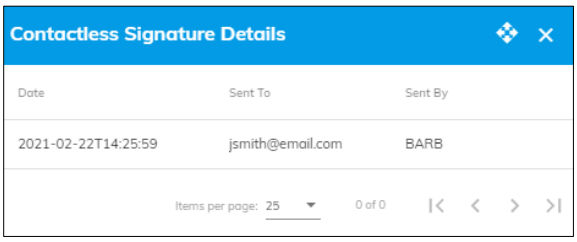
Contactless Signature Log

The Contactless Signature Log page is used to view the completed work orders that were checked out *before* a contactless signature was received.

1. Click **System Logs** from the left menu and select **Contactless Signature Log** from the Log Type drop-down list.



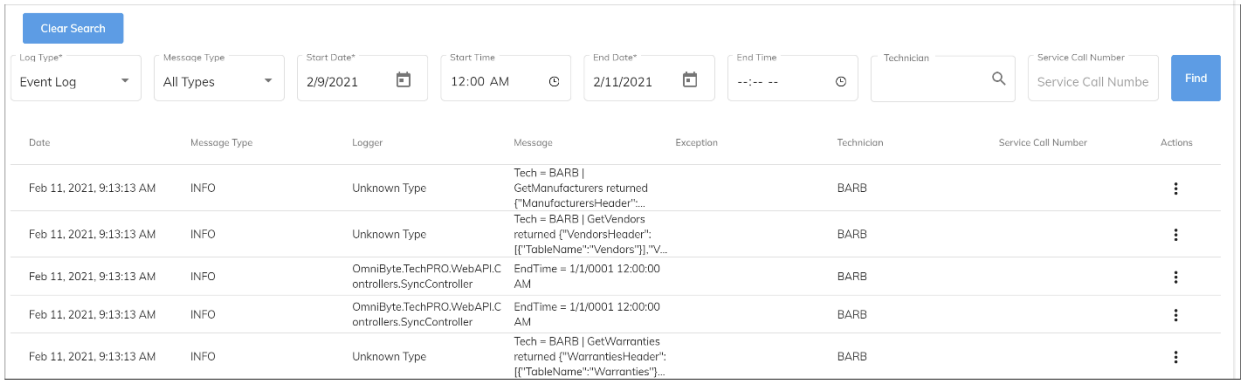
2. Enter a start date and time.
3. Enter an end date and time.
4. Click **Find**.
5. The checkouts meeting the search criteria are displayed.
6. Open the Actions menu to see more options for each checkout. Depending on what is marked for the Contactless Signature Options When Not Received by Checkout option the actions vary.
    - Click **Ignore** to ignore the signature request and remove it from the window. This implies that you do not need this signature.
    - Click Attach Updated Report to Work Order to send the report to the back office and add it as an attachment to the work order.
    - Click Updated Report to Work Order and Resend Checkout Email to send the report to the back office and add it as an attachment to the work order and send the same email that was sent during the original checkout with the signature on the report.
    - Click **Resend Contactless Signature Request** to resend a request for the signature using the same method (text or email) as the original request to the same phone number or email address.
    - Click **View Details** to open the Contactless Signature Details window to view the details about the contactless signature.



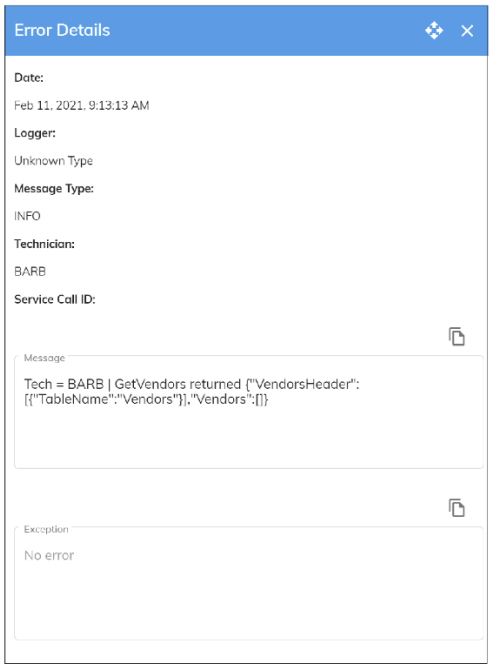
Event Log

The Event Log page displays all the events that have occurred on the mobile app or in processing checkouts. We suggest using the Checkout Log instead when you first encounter errors. This log may be helpful if you have an error and need more information about the events occurring before and after the error occurred to help you resolve it.

1. Click **System Logs** from the left menu and select **Event Log** from the Log Type drop-down list.



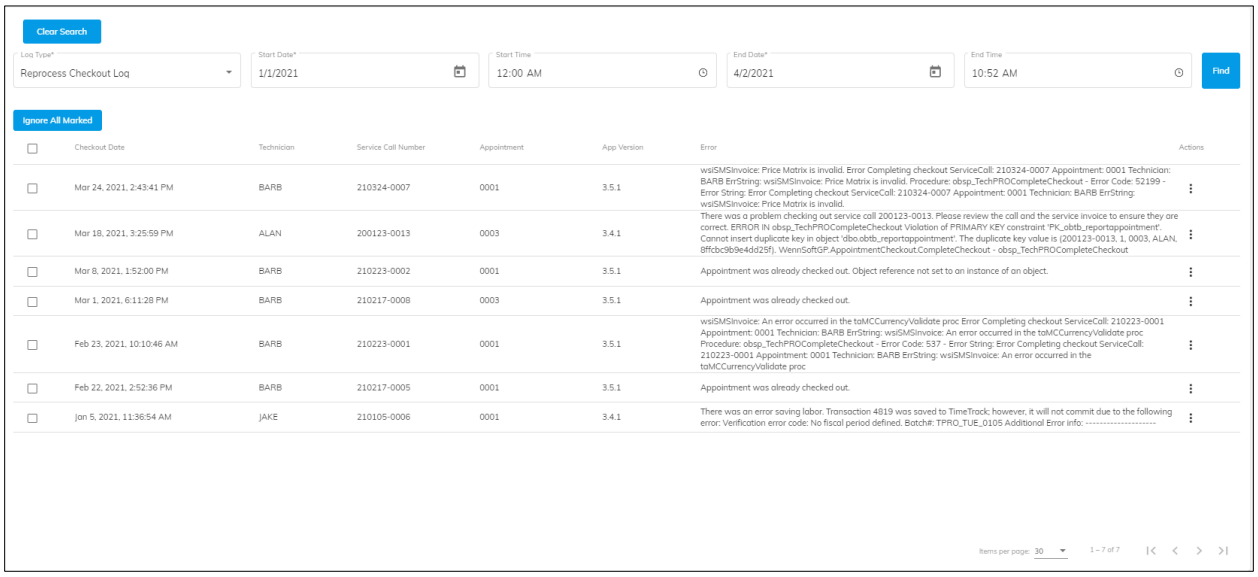
2. Select the message type that you want to display: All Types, Error, or Information.
3. Enter a start date and time.
4. Enter an end date and time. Because this log tracks a lot of data, it may be helpful to enter a short timeframe if you're looking for a specific error.
5. Select a technician ID or enter service call number to search for a specific checkout record.
6. Click **Find**. The date, message type, logger, message, exception, technician, and service call number are displayed.
7. To view more details about an error, click **View** under the Actions menu. The Error Details window opens that displays additional information about the error. Message and exception values can be copied to the clipboard by clicking on the Copy icon.



Reprocess Checkout Log

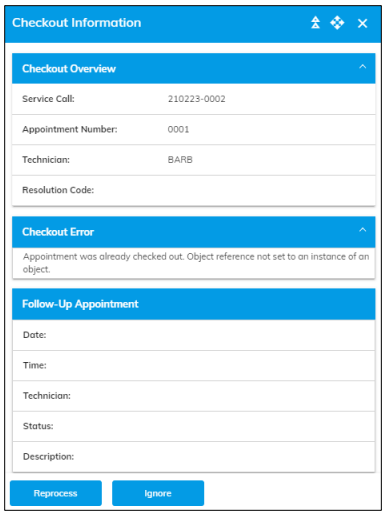
The Reprocess Checkout Log page is where you can view checkout errors and decide whether the appointment checkout should be reprocessed or if the error can be ignored.

1. Click **System Logs** from the left menu and select **Reprocess Checkout Log** from the Log Type drop-down list.



2. Enter a start date and time.
3. Enter an end date and time.
4. Click **Find**.
5. Any checkout errors that occurred appear in a list.
6. If you want to ignore any of the checkout errors, mark the checkbox next to each error and select **Ignore All Marked**.
7. Open the Actions menu to see more options for each checkout.
   - Click **View Details** to open the Checkout Information window where you can view the details of the error. Depending on the error, certain applicable data fields appear editable, and you can change the information to correct an errored field then reprocess the checkout directly from this window.

     The work order summary reports are sent with a reprocess to the original recipients as selected on the checkout.

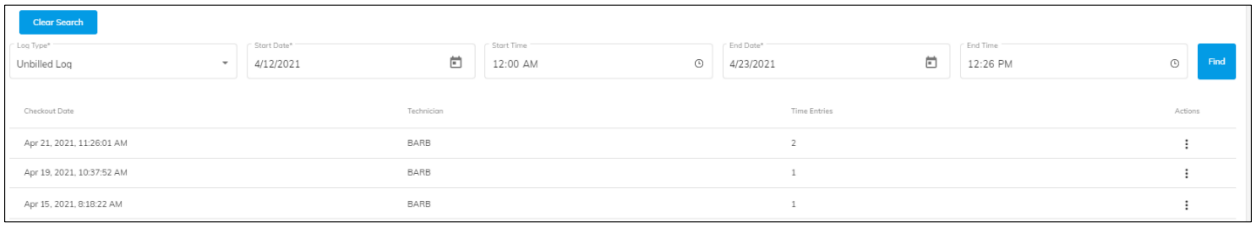


- Click **Reprocess** to reprocess the checkout directly from the list.
- Click **Ignore** to disregard the error because the issue was addressed in the back office and you do not want to reprocess the information. This removes the error from the list.

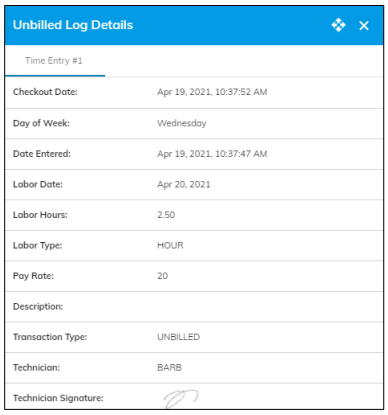
Unbilled Log

The Unbilled Log page is where you can view the unbilled time that was submitted.

1. Click **System Logs** from the left menu and select **Unbilled Log** from the Log Type drop-down list.



2. Enter a start date and time.
3. Enter an end date and time.
4. Click **Find**.
5. The checkout date, technician, and number of time entries are displayed.
6. To view more details, click **View** under the Actions menu. The Unbilled Log Details window opens that displays additional information about the unbilled time.



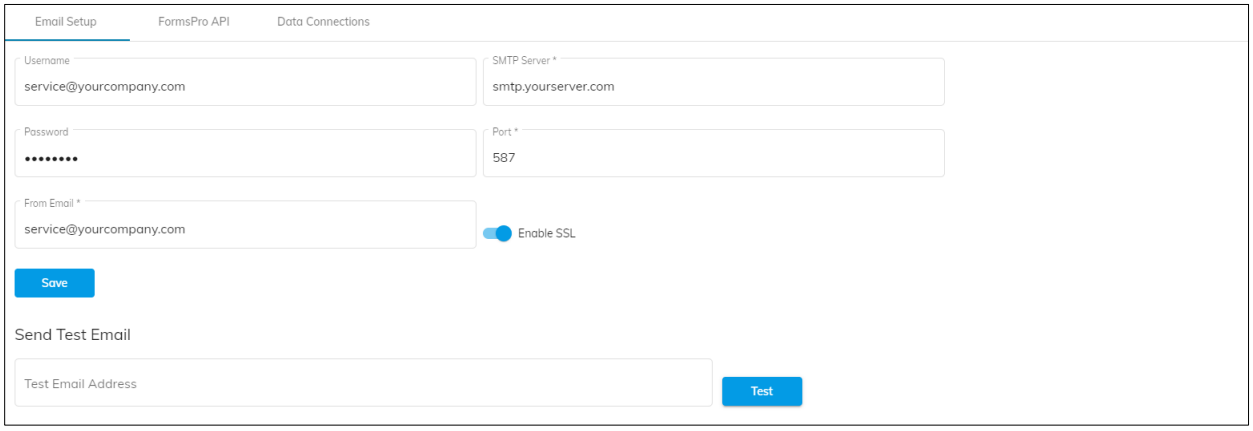
System Settings

System settings are used to set up email information, API configuration for integrating with FormsPro and set up a data connection for URLs.

Email Setup

The Email Setup page is used to send emails from the app to clients and to the back office.

1. From the menu on the left, select **System Settings**, then **Email Setup.**



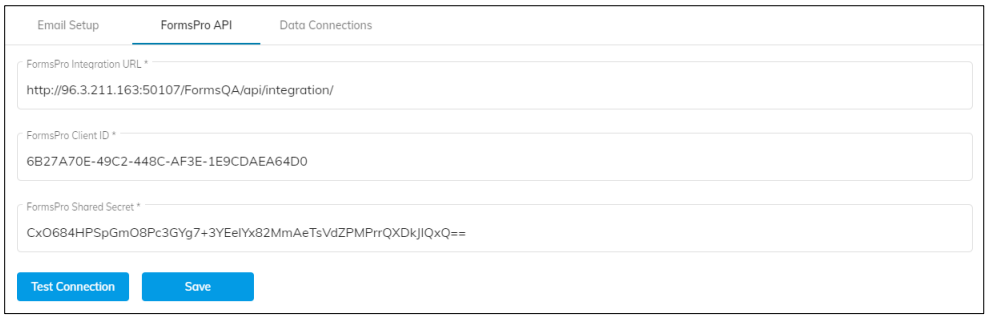
2. Enter an email address for the user that connects to the SMTP server and send emails as the username.
3. Enter an SMTP server name.
4. Enter a password used to connect to the SMTP server.

5. Enter the port number used by the SMTP server.
6. Enter an email address that is used as the sender (From Email field) when sending an email from TechPro.
7. Toggle the **Enable SSL** option on if the SMTP server uses Secure Sockets Layer (SSL).
8. Click **Save** to save your entries.
9. Enter an email address in the Test Email Address field to send a test email to check your settings.
10. Click **Test** to send the test email.

FormsPro API

If you are using the integration between TechPro and FormsPro, there are a few setup items you must complete before the two products will work together. Detailed information about these settings is covered in a separate section called Integrating TechPro and FormsPro.

1. From the menu on the left, select **System Settings**, then **FormsPro API.**

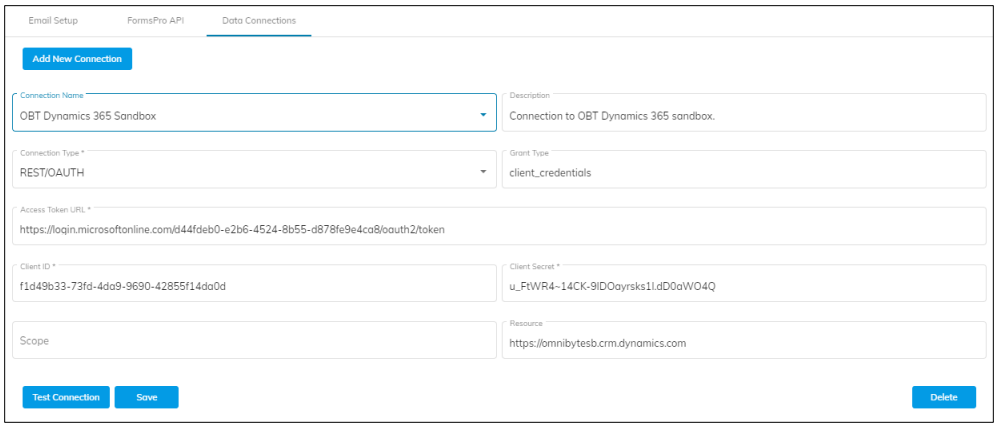


2. Copy the URL from the REST Service URL field in FormsPro and paste it into the FormsPro Integration URL field.
3. Copy the client ID from FormsPro and enter it into the FormsPro Client ID field.
4. Copy the shared secret from FormsPro and enter it into the FormsPro Shared Secret field.
5. Click **Test Connection** to ensure the integration works.
6. Click **Save** to save your entries.

Data Connections

Use the Data Connections tab to configure connection information to a database. The connection string is encrypted when saved to the database.

1. From the menu on the left, select **System Settings**, then **Data Connections.**



1. Click **Add New Connection** to add a new connection. To view or edit an existing data connection, select the connection from the **Connection Name** list.
2. Enter a connection name and description for the connection. This helps you identify the data connection if you connect to more than one database.

   The only connection type available currently is REST/OAUTH. The only grant type currently is client_credentials.

3. Enter the endpoint for the authentication server in the **Access Token URL** field. This is used to exchange the authorization code for an access token.
4. Enter a client ID and client secret. This information is issued to the client during the application registration process.
5. Enter the scope of the access request that manages permissions to protected resources.
6. Enter the resource of the access request.
7. Click **Test Connection** to ensure your settings are correct.
   Data connections can be edited by clicking a connection on the Data Connections page. The Connection window opens, and the settings can be changed.
8. Click **Save** when you've completed your changes.

   Data connections can only be deleted if they have not been used on a link button setting.

App Configuration Using User-Defined Fields and the Field Designer

There are two ways to configure the TechPro app to modify the fields to display and capture the information your organization needs from the technicians in the field.

- Create user-defined fields for information that's not provided in the standard TechPro application that can pull and push data in and out of the mobile app. These fields can then be added to the workspaces where you need them.
- Use the drag and drop field designer to configure the fields you need displayed on the app in the order that makes sense to provide the information technicians need to get their work done.

Add User-Defined Fields to Appointments, Equipment and Parts Workspaces

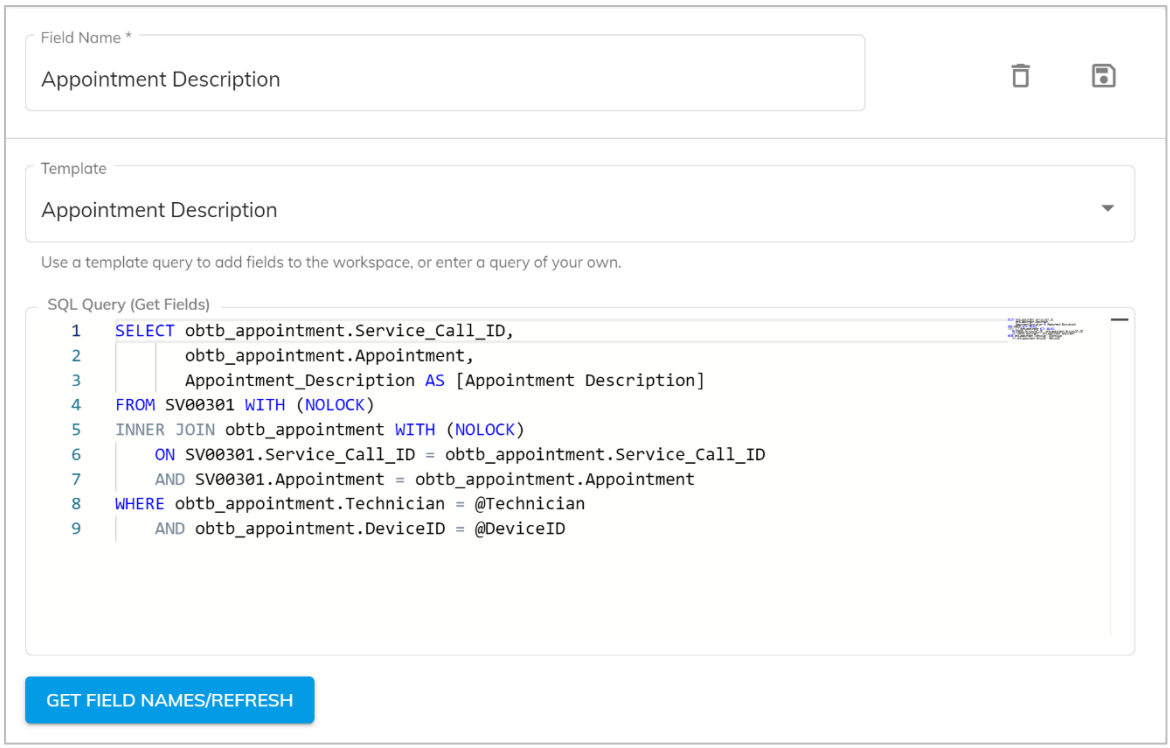
User-defined fields are used to add fields directly from SQL queries to TechPro. Once you create these fields, they are placed onto the workspaces using the Field Designer. Contact support@omnibyte.com if you'd like assistance with this feature.

Only one user-defined field can be added per workspace. However, your query can return as many individual fields as you'd like. For example, you can compose a query that gets the Appointment Description, User Defined 1A, and any number of additional fields you want to add to the Appointments list. They're all grouped together as one user-defined field name but are added individually to the workspace.

First, you'll add the user-defined fields to the TechPro Admin site. A user-defined field can be added for appointments, equipment, and parts.

When you add fields to appointments, the fields appear in both the Appointments list and in the header that appears above each workspace.

1. From the menu on the left, click **User-Defined Fields**, then **Create New Field**.



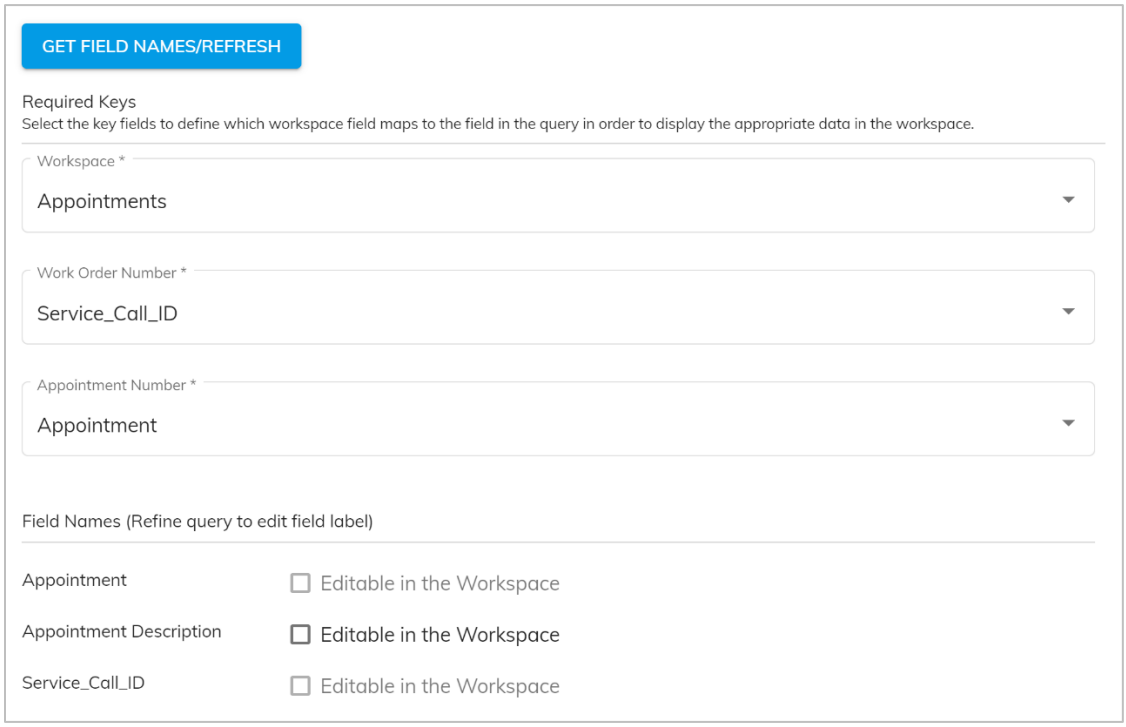
2. In the **Field Name** field, enter a name for your user-defined field. This helps you identify the field in the list of previously set up user-defined fields in the menu list. Each user-defined field can be comprised using a query that returns several fields. Each can be individually added to the workspace but are grouped under a single name here.

3. Select a template query to help you compose a similar query or compose a query to get the fields you want to use for the user defined field, and edit the template as needed. When composing your

query, include key fields from the table to associate to the workspace so that the appropriate key mapping can be made (see step 4).

TIP: Include 'WITH (NOLOCK)' after all tables in your query. By default, in SQL, retrieving data reads only committed data, so the query must wait for data that is being written until it can return. When you use WITH (NOLOCK), this tells it to get data regardless of any other queries that are modifying it. This helps prevent deadlocks and uses less memory; however, it is possible to get a "dirty read," which means that you may read data that is being altered.

4. Click **Get Field Names/Refresh**. This will get the fields from the query and list them in the Field Names list. Click this every time you modify the query to refresh the Field Names list.



5. Use the Required Keys fields to associate the workspace fields with the fields from the query so that the appropriate data for the new fields are shown in the workspace.

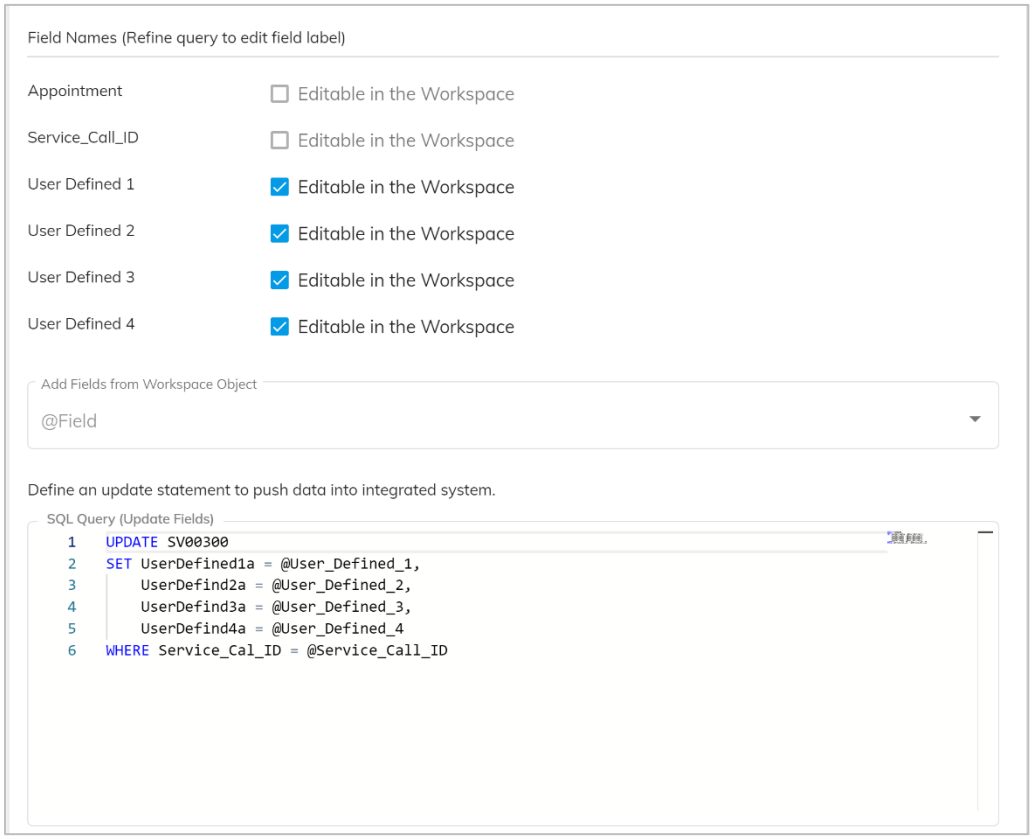
   As fields are mapped, they become unavailable for adding to the workspace from the field designer, and the checkbox for editable is disabled. (Since they're key fields for the workspace, they are already part of TechPro, and don't need to be added to the workspaces.)

   - In the Workspace list, select the workspace that the user defined fields from the query will be added to. Only Appointments, Equipment and Parts are available.
   - Depending on your selection, the next fields change. You will need to select the key field in your query to associate with the key field(s) on the workspace.

6. If you want to allow technicians to enter data in the field from the app, mark the Editable in the Workspace box next to each field.

If the fields you added are display only, click **Save** and the fields are available in the User Defined Fields box in the Field Designer to add to the workspace.

The following illustration uses a different get fields query to show an appropriate example for the update fields query:

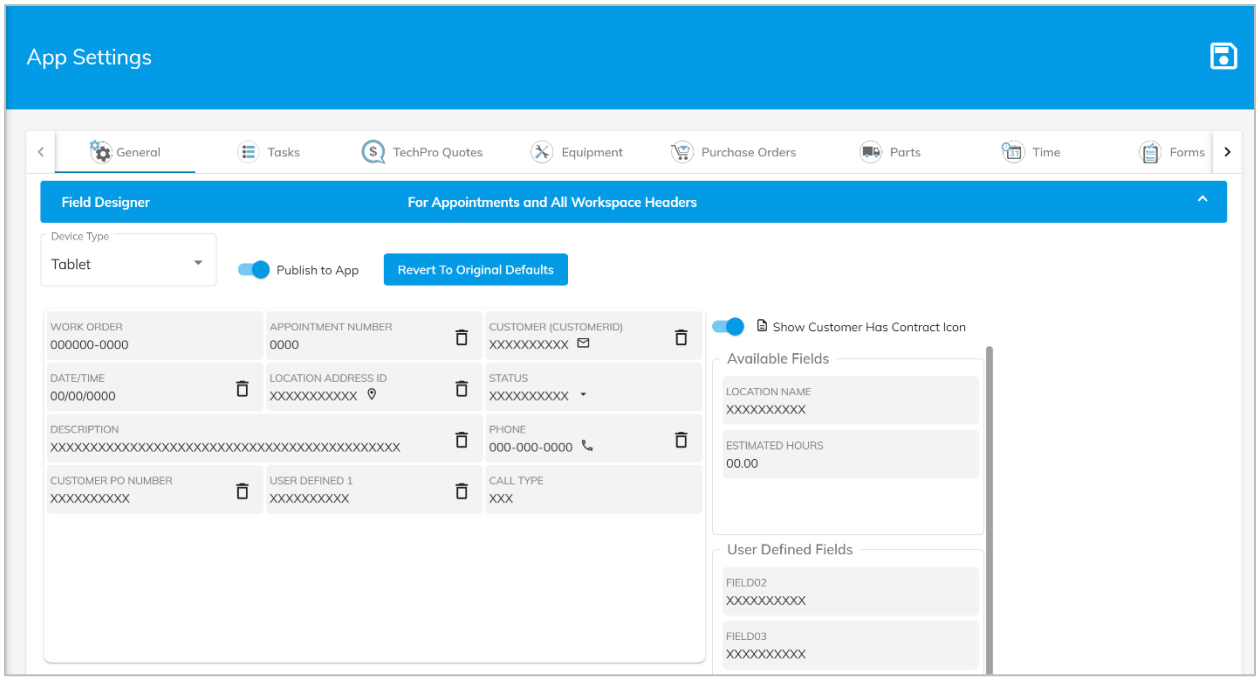


7. Compose a query to update fields in the appropriate table. Click Save. The templates provided may help you with your query if you're unsure where to start. User Defined fields that push data will simply update the database. Any event triggers will need to be handled separately.
   At this point, the user-defined fields you added will appear in the User Defined Fields box in the Field Designer and you can drag them onto the appropriate workspace.

Drag and Drop Field Designer

A Field Designer section is available in the admin site for configuring the fields for appointments in the list and workspace heaters, and Equipment and Parts workspaces using the associated App Settings tab in the Admin Site. With this, and the user-defined fields that you can add, you can configure the application as needed. When you first use the Field Designer, the original defaults from the system appear.

In the Field Designer for the workspace, you want to configure, select the device type your technicians use most often. You will need to adjust the layout for both device types independently unless you restrict your technicians to only one device type.



Add fields Drag and drop field any field in the Available Fields or User Defined Fields list onto the design space to add fields to the workspace. All fields will display XXX or 0000 depending on whether the field displays text or numbers, so you get a good idea of the size of the data that will be shown. Any icons on fields, such as the envelope for opening email, is also displayed so you can see where that will be placed.

Remove fields that have a Delete icon can be removed from the workspace if the information isn't tracked in your back-office system. The field will appear in the Available Fields list so it can be added later, if needed. Fields that cannot be deleted because they contain pertinent information for the application to function appropriately do not have a Delete icon.

Rearrange Fields Once a field is in the design space, you can drag and drop the fields in any order to display information in the most relevant way for your technicians using the mobile app. Fields can be moved into either an empty space or drag it over an existing one and the remaining fields will adjust. You can also leave blank spaces as needed.

Expand/Collapse The fields that you place in the top line are the ones that are displayed when you collapse the data in the workspace. Consider the more important information for your technicians and be sure to leave that in the top row. For example, if your technicians need to change the appointment status often, you'll want to place that on the top row, especially for a phone device type, so that the field is easy to access.

Resize fields Drag the side of a field to fill a larger space. This is great for description or address fields which may wrap when in a narrower space. You are able to only widen fields. The whole row will automatically size if one field is taller than the others.

Show Customer has Contract Icon An icon is displayed for the Appointments list when a customer has a contract. If you would rather not display that icon at all, you can toggle that option to off.

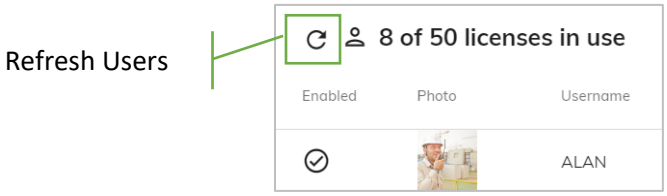
Revert to Default If you'd like to start over, or decide you don't need the changes you've made, click Revert to Default. This will reset the design space to the basic layout provided in TechPro.

Publish to App Once you've added, moved and/or deleted all the fields your organization needs, toggle the Publish switch to on. Click Save. The workspaces will appear to your designs. Any changes you make will appear immediately on the mobile devices (users may need to sync first) when you save your changes, if you've set the publish to on.

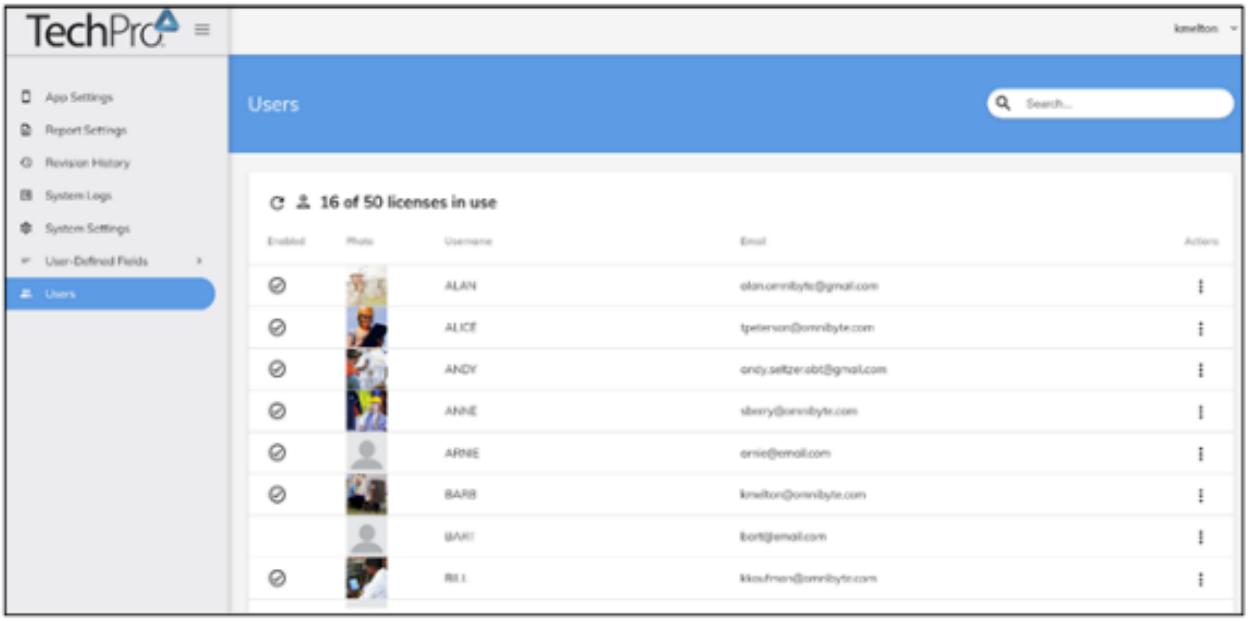
Users

The Users page is designed to set up the technician user records that are using the mobile app. Choose Users from the left menu. They need to be assigned an employee ID to be a user in TechPro. Only licensed users display in the app.

Click Refresh Users, next to the count of active licenses in use, as shown in the following illustration. This brings any technician records from the back office into the Admin Site. The browser refresh button does not have this same functionality.

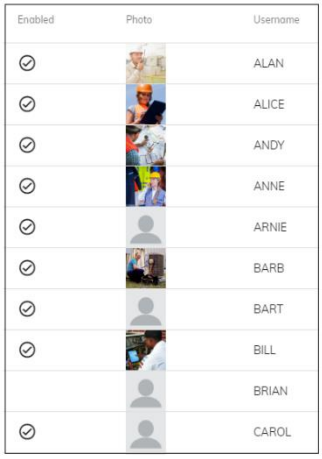


The Users page displays all users from the back office, and displays if they are enabled, their profile photo, username, and email address. Enabled means that the user is set up and has a license, but they are not using TechPro (probably haven't been trained yet).



The user count is displayed at the top of the Users page. In the following example, there are 16 licensed users out of 50 total licenses.

The check icon next to each user means they are a licensed user.

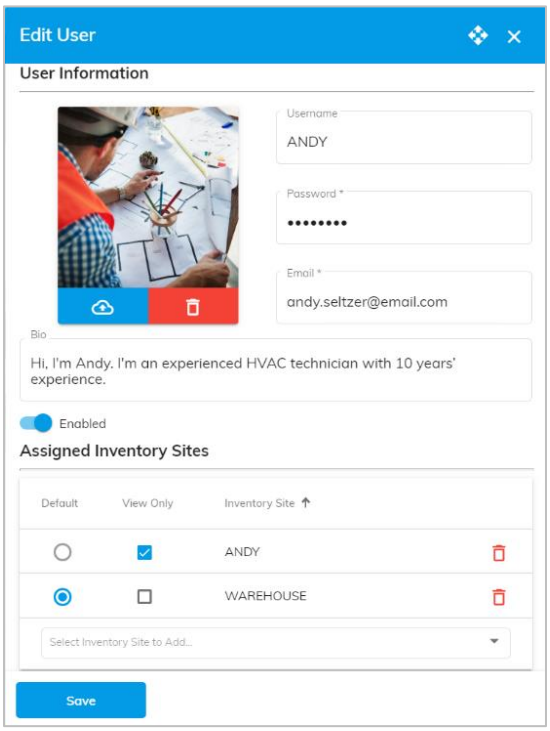


In this example, Alan, Alice, Andy, Anne, Arne, Barb, Bart, Bill, and Carol are licensed users, but Brian is not.

Editing Users

Use the Edit User window to make changes to the TechPro users as your needs change.

1. From the **Actions** menu, click **Edit User** for the user you to which you want to make changes. The Edit User window opens.



2. Technician usernames are set and modified using the Technician Setup window in the back office (Signature > Setup > Lookup Setup > Technicians). Usernames are used to log in to the mobile app.
3. Enter a password for the technician to use to log into the app.
4. Enter the technician's email address.

5. Upload a picture of the technician (optional). This picture appears on the app when the tech is logged in.
6. Enter a bio (optional) for the technician.
7. Toggle the **Enabled** option on to give the technician access to the mobile app.
8. Assigned Inventory Sites is a listing of sites the technician can pull from when using parts on an appointment. To add a new inventory site to the list, select it from the Select Inventory Site to Add list. Only an assigned site can be marked as default for a user.
9. To add a view only site, click the checkbox next the Inventory Site ID. Sites marked as View Only show the quantity available in the mobile app, but cannot be selected as a site on a purchase order or to pull parts from.

   View only sites can't be marked as a default site.

10. Click **Save** when you've completed the information for this technician.

Integrating TechPro and FormsPro

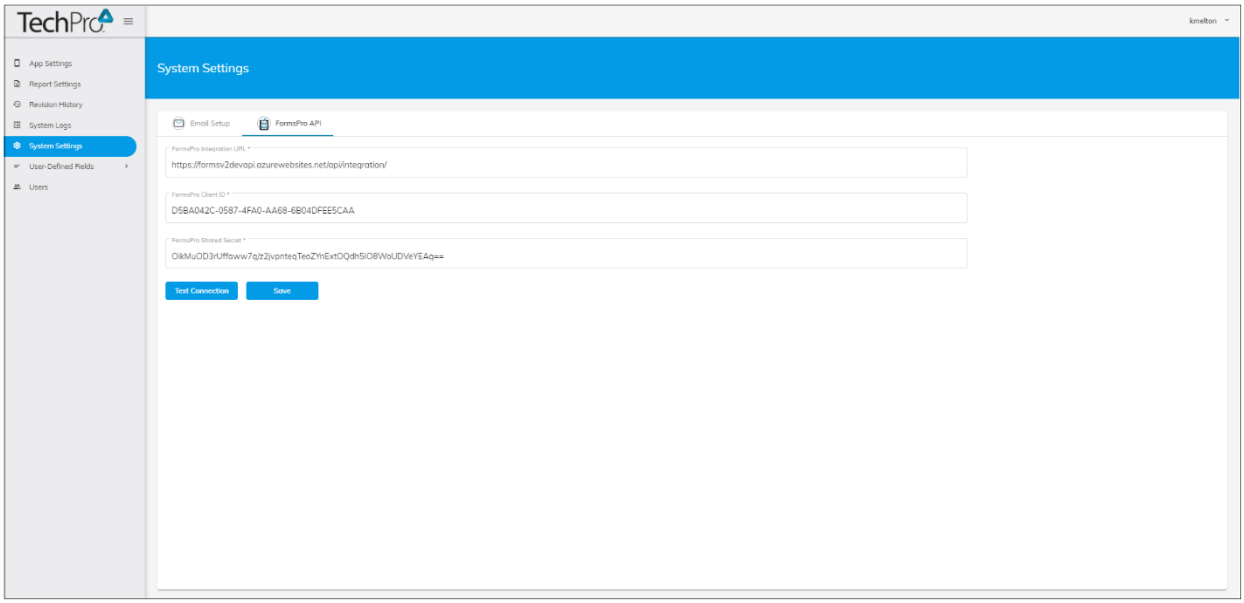
If you are using TechPro and FormsPro by OmniByte, you can integrate the two products to work seamlessly with each other. This is useful for techs who must fill out a form as part of a work order. Using the integration, forms have a separate workspace for opening and completing forms, and the forms are attached to the work order at checkout.

If you are using both products and have not yet integrated the two, contact us at sales@omnibyte.com.

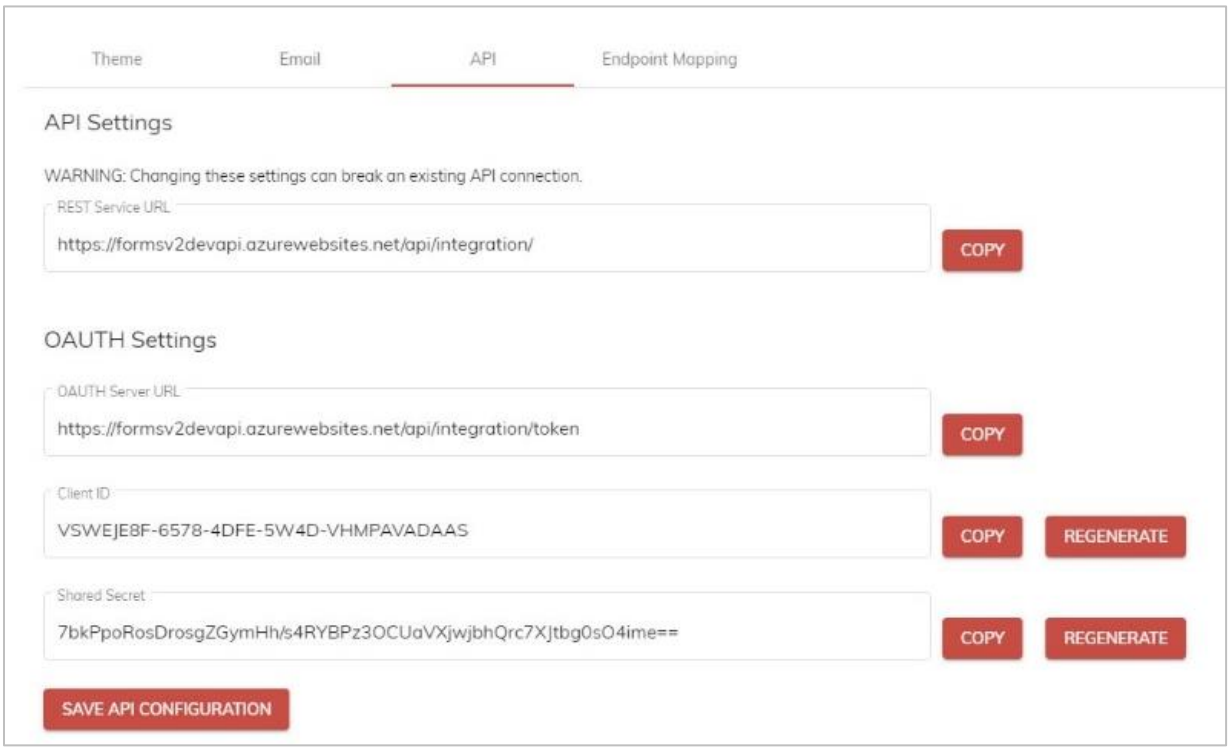
FormsPro API Configuration

The API configuration "links" the products using the API configuration settings in FormsPro. This information must first be set up in FormsPro. If you have not completed the process in FormsPro, do that, then come back to this procedure.

1. From the menu on the left, select **System Settings**, then **FormsPro API.**



2. Open another browser tab and open the FormsPro Admin Site as well. You'll be copying the information from FormsPro into the TechPro tab. In FormsPro, from the **Configuration** menu, then select **API** to open the API settings tab.



3. Click the **Copy** button next to the REST Service URL field in FormsPro.
4. Switch back to TechPro and paste the copied URL into the FormsPro Integration URL field.
5. Switch back to FormsPro and click **Copy** next to the Client ID field in the OAUTH Settings section. (You do not need to regenerate a client ID at this time – only if your client has expired.)

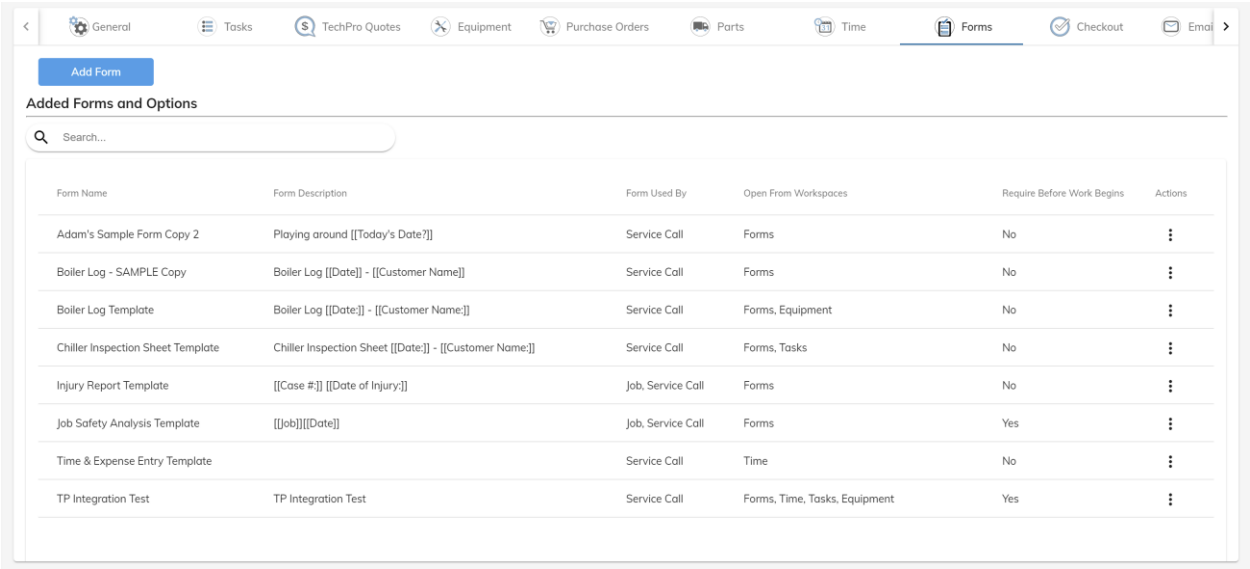
6. In TechPro, paste the copied client ID in the FormsPro ClientID field.
7. Switch one more time to FormsPro and click **Copy** next to the Shared Secret field in the OAUTH Settings section.
8. In TechPro, paste the copied shared secret in the FormsPro Shared Secret field.
9. The entries in both product for the three fields in TechPro should be identical to each other. Click **Test Connection** to verify the settings.
10. Click **Save** in TechPro to save your configuration settings.

If you need to update the client ID and shared secret in FormsPro, be sure to copy the updated entries in TechPro.

FormsPro Settings

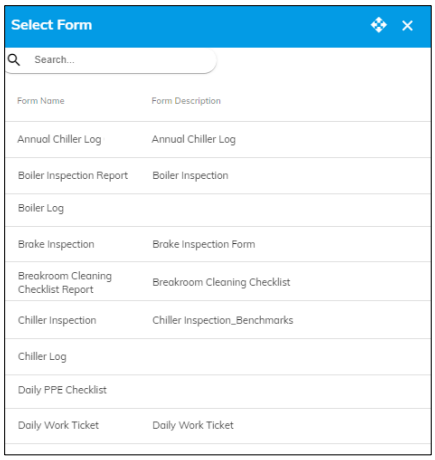
Once the API configuration is complete, the Forms tab is available. Be sure the forms you intend to use in the integration are set up and published in FormsPro. The Forms tab is used to select the forms you want to use as part of TechPro and to map the TechPro fields to a field in the form so that the form uses the entries automatically from TechPro.

1. From the menu on the left, click **App Settings**, then **Forms**.

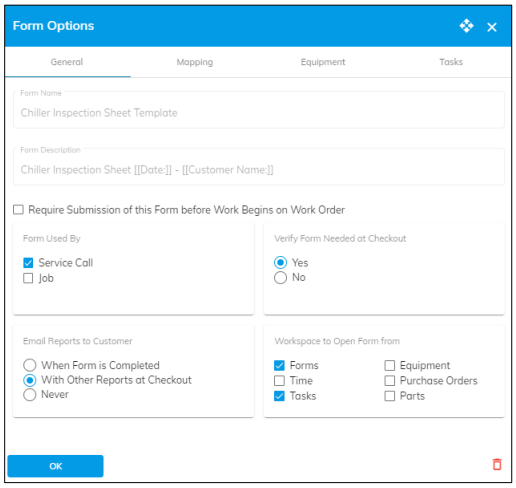


Form Name	Form Description	Form Used By	Open From Workspaces	Require Before Work Begins	Actions
Adam's Sample Form Copy 2	Playing around [[Today's Date?]]	Service Call	Forms	No	
Boiler Log - SAMPLE Copy	Boiler Log [[Date]] - [[Customer Name]]	Service Call	Forms	No	
Boiler Log Template	Boiler Log [[Date:]] - [[Customer Name:]]	Service Call	Forms, Equipment	No	
Chiller Inspection Sheet Template	Chiller Inspection Sheet [[Date:]] - [[Customer Name:]]	Service Call	Forms, Tasks	No	
Injury Report Template	[[Case #:]] [[Date of Injury:]]	Job, Service Call	Forms	No	
Job Safety Analysis Template	[[Job]][[Date]]	Job, Service Call	Forms	Yes	
Time & Expense Entry Template		Service Call	Time	No	
TP Integration Test	TP Integration Test	Service Call	Forms, Time, Tasks, Equipment	Yes	

2. Click **Add Form** to open the Select Form window and select a form to add to the list. Only forms that are published appear in the list.



3. Select a form you want to use in TechPro to open the Form Options window.



4. Mark **Require Submission of this Form Before Work Begins on Work Order** to require the submission to start work. This can be used to ensure a safety form is completed before the workspaces can be used on the app. See the section about Workspace Order for information about locking workspaces prior to submitting a form.

5. Specify how you want to email reports to a customer. Select **When Form is Completed** to email reports to a customer once a form is completed and submitted, but before checkout. This can be useful when sending out a safety report. Remind your app users to mark the customer email address in the Email section of the form to be sure the reports are sent. Select **With Other Reports at Checkout** to email reports to a customer at checkout. Select **Never** to never send the report that is associated with the form with the email to the customer at checkout. This is useful if you have an internal form that's part of the work order process but isn't appropriate for sending to customers.

   When the work order is complete, the email sent to the customer will include the work order summary and any form reports that are not marked to exclude. The technician will continue to receive the form reports, any marked Never are excluded only from the customer email.

6. The Verify Form Needed at Checkout section determines whether the technician needs to mark the Form Not Needed checkbox at checkout. Mark **Yes** to display the form in the Forms section of the

Checkout workspace. The form will need to be completed, or mark the Form Not Needed option on the device. Mark **No** and the form does not appear with the other forms not needed in the Forms section of the Checkout workspace and it does not need to be completed. This is useful for optional forms or forms such as injury reports that you want handy, but technicians don't complete on every work order.

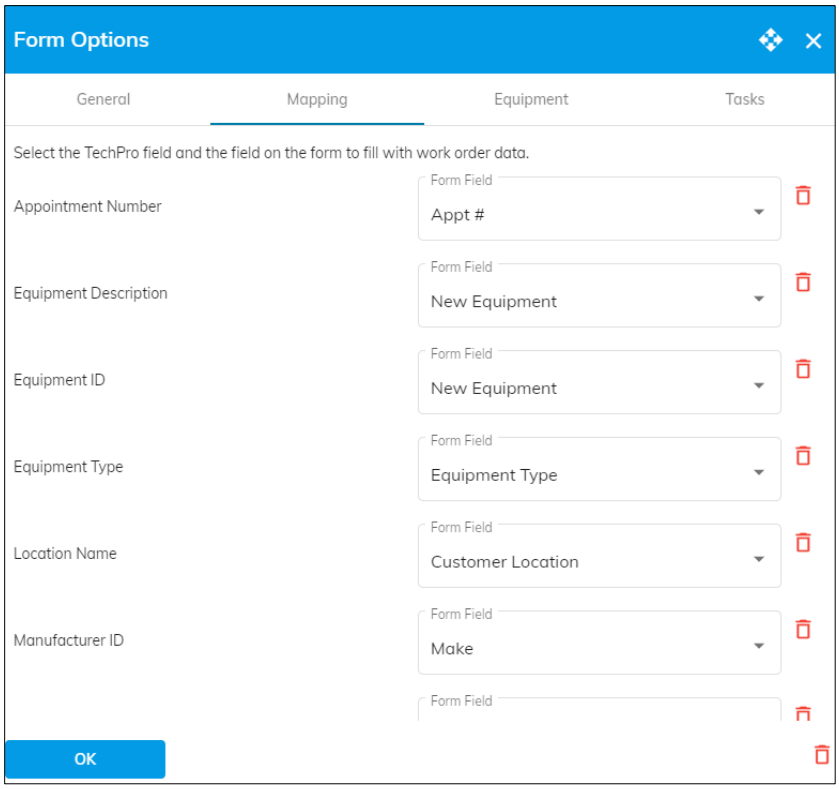
If a user does complete the form, it appears with the Submitted forms in the Forms section of the Checkout workspace.

7. Select how the form will be used in TechPro – on service calls, on jobs, or both. This determines whether the Forms workspace will display the form according to the work order type, along with the role assigned to the form and user. For example, you have a form for tracking refrigerant which is only used on commercial service calls. Your roles in FormsPro are Commercial and Residential. The refrigerant form will only appear in the Forms workspace for users assigned to the Commercial role, and only on Service Call type work orders.
8. Select the additional workspace(s) to which you want to add the form. You can add the form to the Forms, Time, Tasks, Equipment, Purchase Orders and/or Parts workspaces.

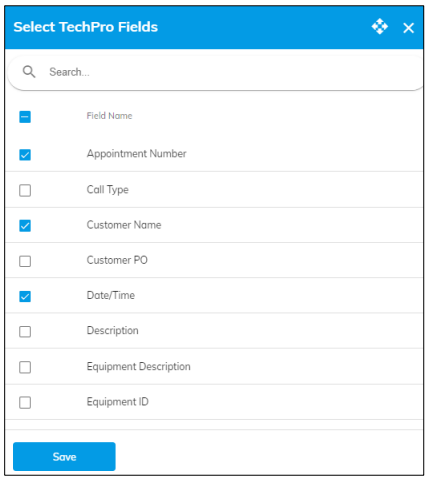
   If you no longer use a form with TechPro, you can delete if from the Form Options page by clicking the Delete icon in the lower right-hand corner. Deleting a form from this page does not affect the form in FormsPro in any way.

Using the Mapping Tab

1. Click **Mapping** to map TechPro fields to FormsPro fields. Mapped fields populate information from the TechPro header of each workspace into the field on the form. Mapping is optional– if you want the tech to complete all fields manually, or if there are no related fields on the form, you can leave this Mapping tab blank.



2. Click the add button to open the Select TechPro Fields window that display the fields in TechPro that can be mapped.



The following fields in TechPro can be mapped to FormsPro fields:

- Appointment Number
- Call Type
- Customer Name
- Customer PO
- Date/Time
- Description

- Equipment Description
- Equipment ID
- Equipment Type
- Location Address ID
- Location Name
- Manufacturer ID
- Model
- Phone
- Serial Number
- Status
- Task Code
- Task Description
- Work Order

Multiple fields can be selected, which, when closed, appear in the Mapping tab. Then from the Form Field list, select the FormsPro field to associate to the TechPro field. You can map as many fields as you like, but when a Tech Pro field is added, the Form field is required. Associations can be deleted using the delete button or changed by selecting a different Form field.

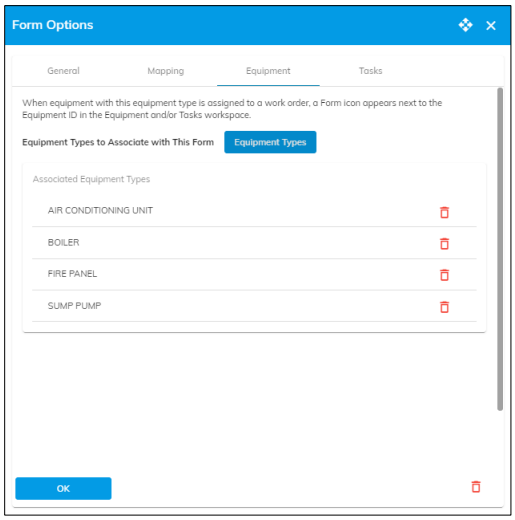
Mapped fields with a many to one relationship on a work order, such as equipment ID and task ID, appear on the form only when opened from a particular equipment record or task in TechPro. If a form is opened from the Form button on the Equipment or Tasks workspace it will not map to those fields.

You can update the field mappings at any time by changing the FormsPro fields and clicking Save. The next time the tech syncs the device, the map will be updated on the device.

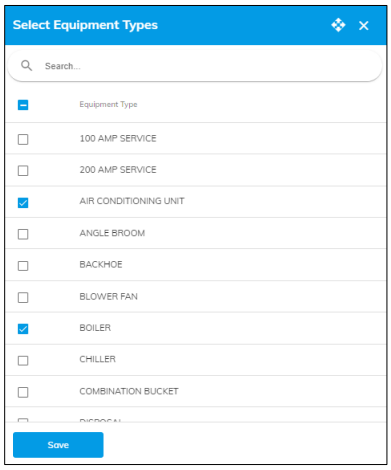
Once a form has been set up and mapped, the technician will see the form on the mobile device in the Forms workspace.

Using the Equipment Tab

1. Click **Equipment** to associate an equipment type with the form. When equipment is assigned the equipment type on a work order, the form can be opened from the Equipment or Tasks workspace.



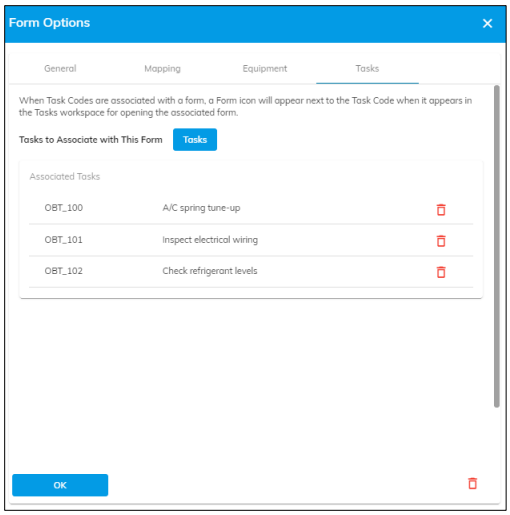
2. Click the **Equipment Types** button to open the Select Equipment Types window.



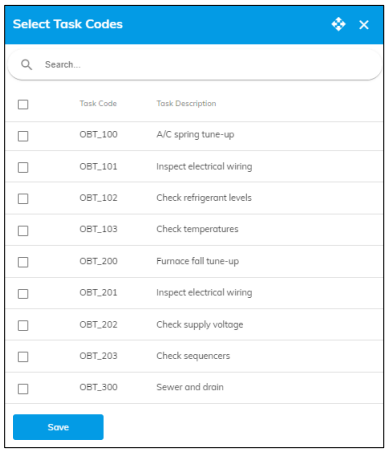
This window lists all the equipment types that are available in Signature. Select the equipment types to associate with the form so that when equipment with the selected equipment type is assigned on a work order, this form can be opened from the Forms button in the equipment record in the Equipment workspace, or from the equipment header that appears in the Tasks workspace.

Using the Tasks Tab

1. Click **Tasks** to associate a task code with a form. When a task code is associated with a form, a Form icon appears next to the task code when it appears in the Tasks workspace for opening the associated form.



3. Click the **Tasks** button to open the Select Task Codes window. This window lists all the task codes that are available in Signature. Select the task codes to associate with the form so that when a task with the selected task code is assigned on a work order, this form can be opened from the Tasks workspace.



Tips When Using Forms in TechPro

Forms you want to use in TechPro might need some modifications for the two products to work together seamlessly:

- The username and password for the tech should be the same in both products. The roles used in FormsPro will be used to show the appropriate forms, just like they do in FormsPro alone.
- Integrating fields work best when they're mapped to a text field. Even when you have a set of answers, there is only ever going to be one response per field coming from TechPro, and, if TechPro fills a text field instead of selecting a radio button, the format of the data will match exactly – you don't have to worry about case or spelling or any other formatting. For example, let's say you're matching location to a form field called Location. If your location on your form is a text field, any data from TechPro will appear as text on the form. But, since location in the back office is not a set standard of options, you may have a location in TechPro that is not listed in the options in FormsPro.

- Dynamic fields that have associated fields (using the Depends On setting) do not appear in the FormsPro fields list – only the primary field will be listed. This will ensure that the data fills the form appropriately. Information from the Dynamic Field will complete the form fields that are not mapped.
- Consider editing the report PDF name in FormsPro to include an equipment number or other piece of identifying information, it will be easier to identify the applicable form in the back-office application; especially if you have multiple entries of the same form per work order. For example, if your technician is inspecting several rooftop units in one appointment, each with its own form, the instead of "Inspection Report.pdf" being listed multiple times in the Document Attachments window, you'll see Inspection Report RTU1.pdf, Inspection Report RTU2.pdf, etc. The File Name can be edited in the Manage Report window opened from the Edit button on the Reports icon in FormsPro.
- Only the default report for each form is included in the check out in TechPro. However, if you have multiple reports for each form, the additional reports are available through FormsPro using the View/Edit Submitted Forms page.
- Forms that have an email address in the Email Form To field or as an email rule set up, are sent when the technician submits the form rather than at checkout.
- Workflow on forms started in TechPro does not follow through checkout. If you have forms that have a workflow, and must be used with the integration, the tech will click Submit as usual, and then the form will go through the workflow outside of TechPro. The form at that state will be attached to the service call. The final submission of the form will occur outside of TechPro and will need to be manually attached to the work order in the back office, if you need the details added during the workflow. This is so that a work order checkout doesn't compete with the timing of the workflow.
- FormsPro Envelopes are not included in the integration, because the work order acts as the common factor (just like an envelope) and all forms are included at checkout at once.

Forms Workspace

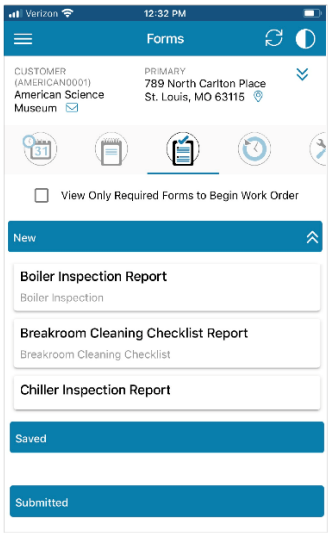
Some of this information is also included below with the mobile app information, however, because as an administrator, there are details you should be aware of, it's included here as well.

It is important to distinguish the differences between using FormsPro and using the integration; because you may still have forms you need to complete that are outside of the TechPro integration.

- If you start a form from TechPro, you won't be able access the started form from FormsPro. Saved forms can be accessed from the Checkout workspace.
- You may not have the same email options on the form when starting from TechPro.
- Use the Back or Save buttons within the apps to move back and forth between products rather than the FormsPro link (on iOS) or switching apps using the device controls.
- Don't close FormsPro when you've started a form from TechPro, as you may lose some of your work. If you must close FormsPro, save your form first.

- A sync will occur if you open a FormsPro form from TechPro without first opening FormsPro and having it running the background. Your forms will open more quickly if you open FormsPro before starting TechPro.
- If you are working offline, and a form was submitted while offline, it will be stored and submitted with the checkout. If it was marked to be emailed when submitted, it will be sent when a connection is made. In addition, if you check out while offline, forms will be stored and submitted with the rest of the work order when a connection is made.

You can access the Forms workspace to complete a form anytime during the work order.



1. Click the form name to open the form.
2. Complete the form according to your company procedures.
3. Click **Submit**.
4. The Forms workspace in TechPro will reopen, and you can repeat these steps to complete the forms necessary to complete your work.

Working with Submitted Appointments in the Back Office

Submitted appointments will appear with a completed status. When an appointment is submitted, you'll also receive the additional information entered in the appointment as follows:

- Do not change call types once a call has been dispatched. This will not carry over to the device and the fields necessary for completing a call may not be available.
- All transactions created in the back office are unposted.
- Time entered will appear in one batch. For information about how batches are named, see the TimeTrack Batch Creation Method information in the System Setup section.
- Any labor hours entered on an appointment or as trailing costs on a completed appointment will update the Actual_Hours column in the SV00301 table and the appointment window in the back office as well.

- Inventory transactions resulting in an adjustment that need to be posted are assigned to batch. Batches are named starting with TPRO followed by the Site ID, for example TPRO_TRUCK1.
- There are no taxes calculated inside of TechPro. However, when a PO contains line items which are taxable in the back office, the taxes are calculated when you commit the PO either by clicking Commit in the Purchase Order Entry window, or by printing the PO using the Print Purchasing Documents window.
- The work order is updated with the remaining information and can be worked using your usual procedures and processes at that point.
- For Service Call Quotes, invoices will use the billing amount entered on the quote after checking out in TechPro.
- If you are using Sales Order Processing for Inventory, and use items with Miscellaneous Charges, Services or Flat Fee item types:
    - When an item with one of those three types is entered as a part in the TechPro Parts workspace, after checkout, a SOP Invoice is created with one line per item entered in the back office. This will use the item pricing set up for these items in Inventory. The transaction is unposted.
    - If you are not using SOP for Inventory, when parts with those item types are entered in TechPro, you will receive an error to help you re-enter the parts manually in the back office. This is because the Inventory module does not track quantities for those items and does not allow inventory adjustments, which is how Parts from TechPro are processed in the back office if you are not using SOP.
    - Kit items will continue to be entered as the individual kit component items rather than as the kit as a whole.
- Calls created in the TechPro app use the defaults set in the back office to help simplify the process of creating a call and enabling your technicians to enter minimal information in order to get to the business of doing the service work. Once the call is created and returned to the device, it will process like any other call.
    - If you're already using a default customer for after-hours calls, you can continue to do the same with TechPro. Instruct your technicians to select that customer from the list, or to search for it.
    - If you use the option where the user enters a Service Call ID for the next service call number, a pop up will open for the technician to enter a number. We recommend using a policy for next numbers to avoid duplicates. No verification that the number exists will be performed.
    - Additional information can be added to the call after it's been submitted.
    - The message and/or restrictions for entering calls for customers with credit warnings is ignored when creating calls from the device. A customer note may help the technician understand some restrictions or to take a payment, but there is no warning on the TechPro app.
    - All calls are created with an Open status, the appointment status is set to the status assigned in the General tab of the Admin Site.

- The division assigned to the call is the division assigned to the customer location. This can be changed in the back office after the call is submitted. If the location division is not accurate enough for your organization, you can create a user-defined field for the appointment and add that to the Appointment and the technician will then be able to enter a different division.
- We strongly recommend thoroughly testing this feature prior to using it in your live production data. This will ensure that all the defaults needed have been set up prior to technicians using the feature and prevent many errors from occurring in your live data.

TechPro Mobile Application

Apple Device Users: If your device is using iOS 11, to turn off a feature called Smart Punctuation, which is set to On as a default on this version. The feature may cause punctuation marks such as quotes, apostrophes, and dashes to convert to other characters, which, if used in any data coming from the back office will not function properly.

You can find your version number in Settings > General > About and scroll to Software Version.

The Smart Punctuation setting is found in Settings > General > Keyboard.

Android users: Android 10 devices have an option to save images as HEIF/HEIC format. This format is not supported for images taken and uploaded using the photo gallery and should be turned off. This setting is found in Settings > Apps > Camera > Save Options > HEIF Pictures.

Notes for mobile app users

If the Auto-Capitalization feature is turned on in your device settings, fields that can contain sentences automatically capitalize the first letter of the sentence. You'll notice this on Description fields, Resolution Notes, Note subject and body fields, Search bars, Task text responses, and Quote details.

The setting is found within the keyboard settings for your device, although navigating to that setting will differ depending on the operating system and device format you use. On Android devices, it may be different per keyboard.

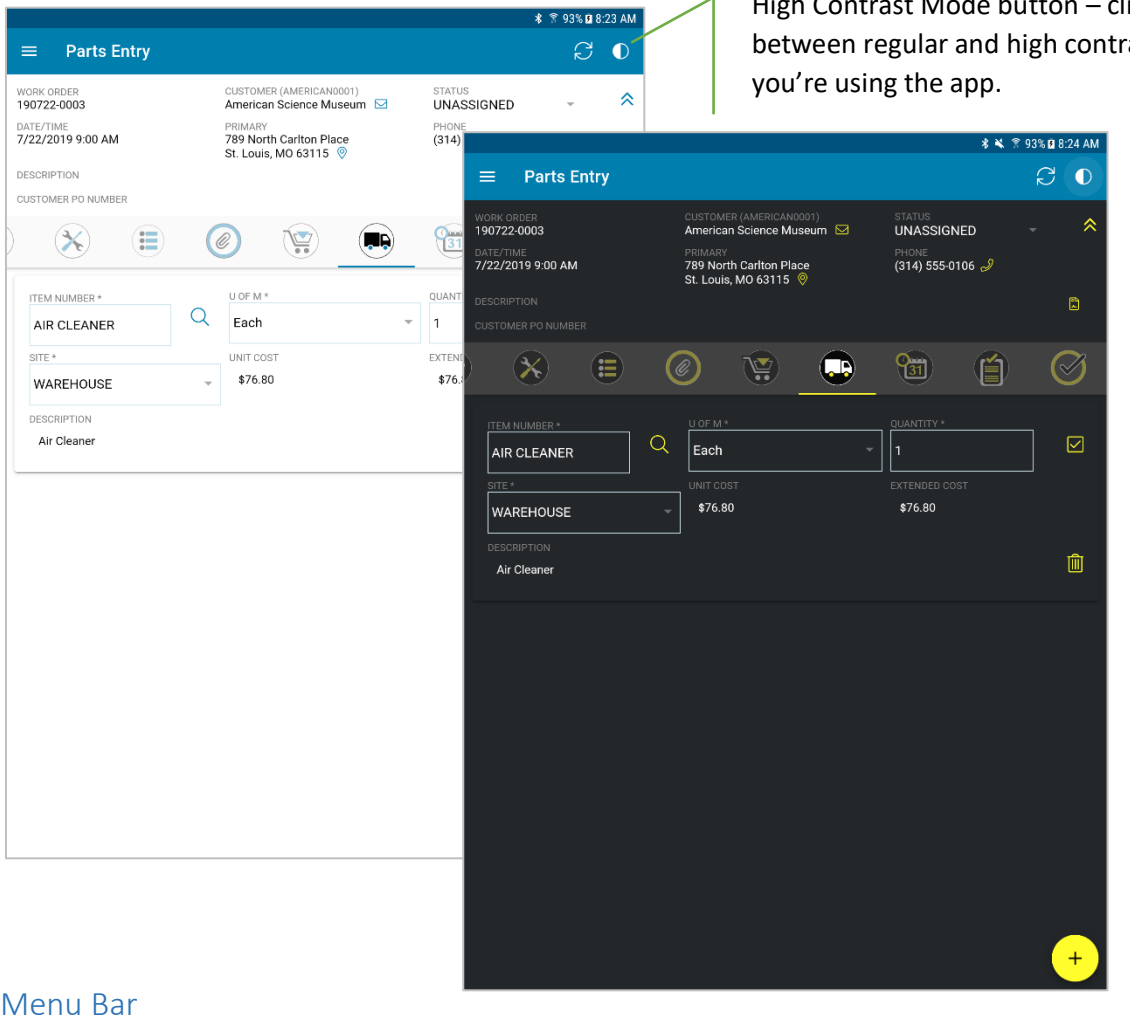
Using the TechPro Mobile App

TechPro is divided into areas to enable you to get into your appointments, do your work while recording data necessary and check out as simply and easily as possible. The following are a few key notes about using the functionality in the app.

The fields in the app may not appear in the same order as the screen shots, as your administrator can add or remove fields from some workspaces, or remove workspaces from the app.

High Contrast Mode

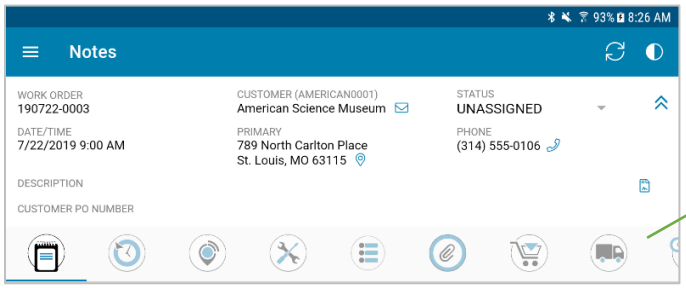
Your app can be displayed in high contrast if you're working outside or need to change the contrast to view your app better.



High Contrast Mode button – click to switch between regular and high contrast any time you're using the app.

Menu Bar

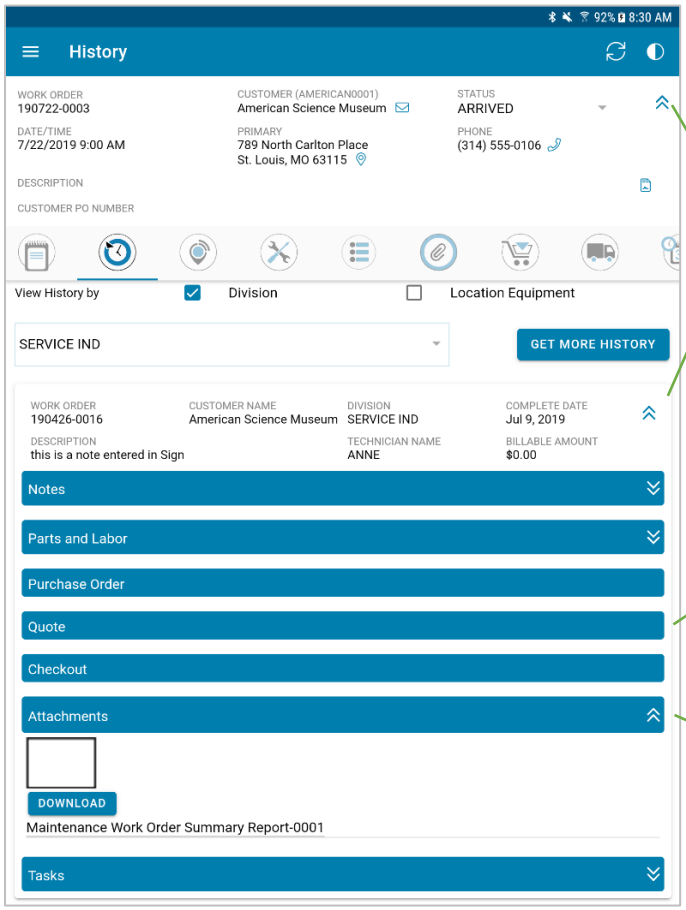
The menu bar allows you to change the workspace you're working on. The menu bar slides left and right to select additional workspaces. Any time you change to another space, the work you completed in the previous workspace is saved automatically.



Slide left or right to see more icons.

Collapsible Areas

There are headings throughout the app which can be expanded and collapsed to hide and show more information. This allows you to customize your app to show as much or as little information as you need at the time. If there is no information to show when expanded, the buttons disappear indicating there is no further information.



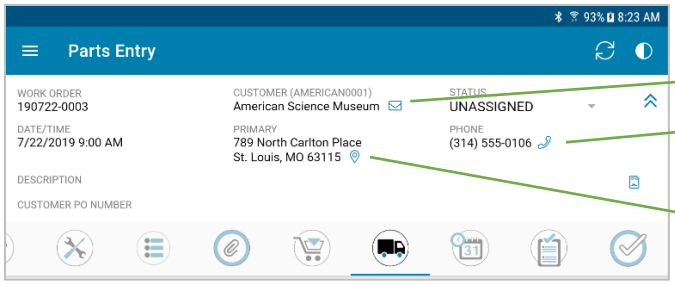
An Expand/Collapse icon indicates areas that can be collapsed to one line or expanded for more details. The appointment header information is always collapsed as a default when using TechPro on a phone.

If there are no additional details, the Expand/Collapse icons do not appear.

Headings like these can be expanded and collapsed.

Appointment Information

At the top of the app, appointment information is displayed for all workspaces. You can use the icons in that section to email, call or get a map for the appointment, if your device is set up with the apps for those purposes.



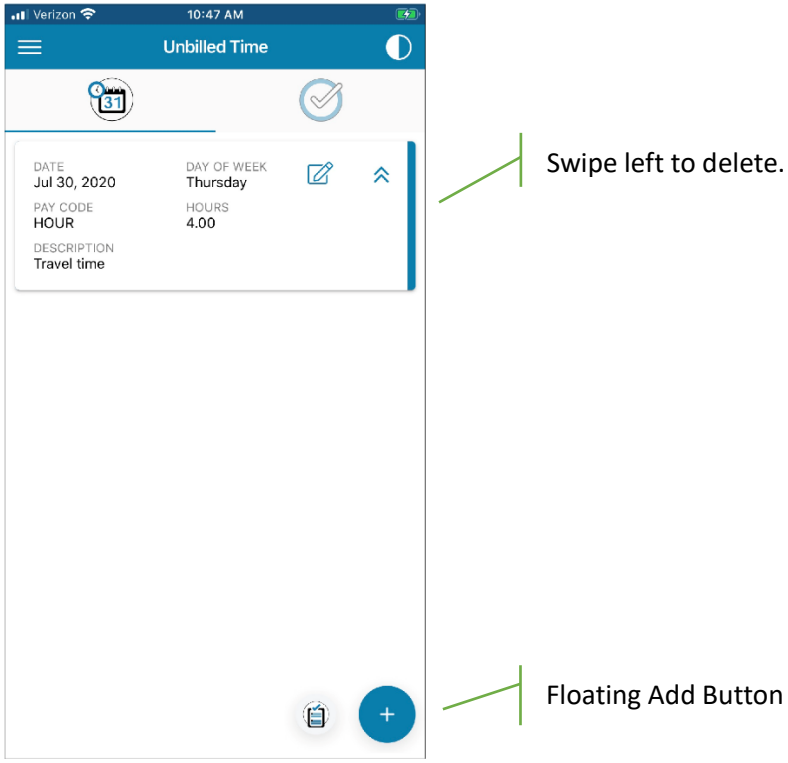
Opens email

Opens your phone app

Opens maps

Adding and Deleting Lines of Information

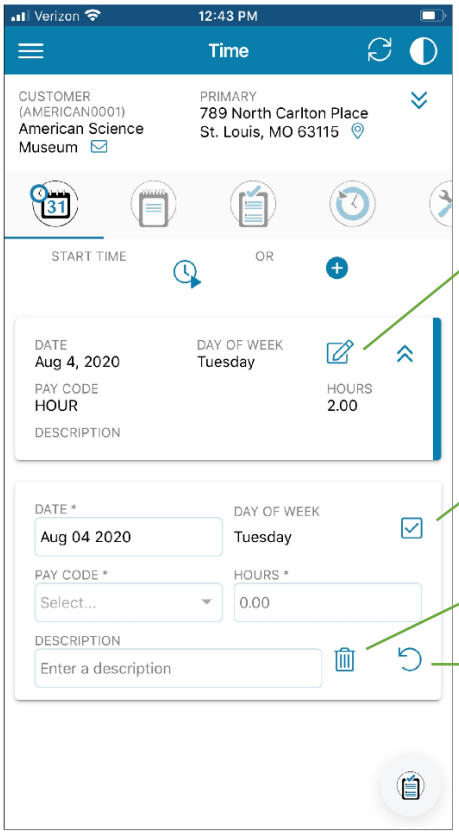
The floating Add button allows you to add records to the appointment as needed. While in edit mode, a record can be deleted using the delete icon. (Records that have been added in the back office cannot be deleted.) Some records can be deleted by swiping to the left and clicking the Delete button that appears on the right. Swipe to delete records are indicated with a blue bar on the right.



Editing Information

Records within workspaces that can be edited are indicated with the edit icon. When selected, the information expands to show the editable information in fields, rather than in display only mode. When you've completed your changes, click the OK icon (which is in the same place as the Edit button was when you started) to accept the new information and revert to display mode. You can change to edit mode as often as needed. Some records have information that is provided by the back office where some, but not all, fields can be edited.

Required fields are indicated with an asterisk in the label name.



Edit button, click to open edit mode.

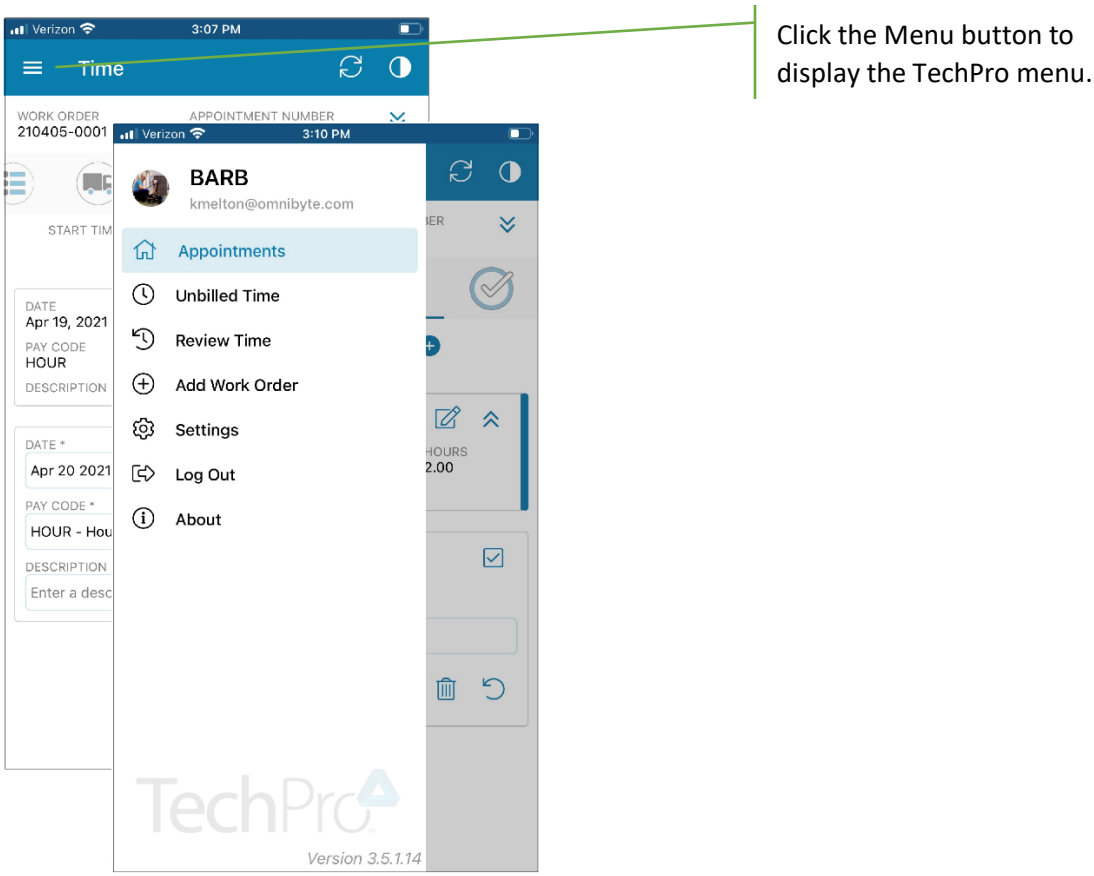
OK button, click to close edit mode.

Delete button, deletes an added line in edit mode.

Undo button, reverts any changes made to the record in edit mode.

Menu

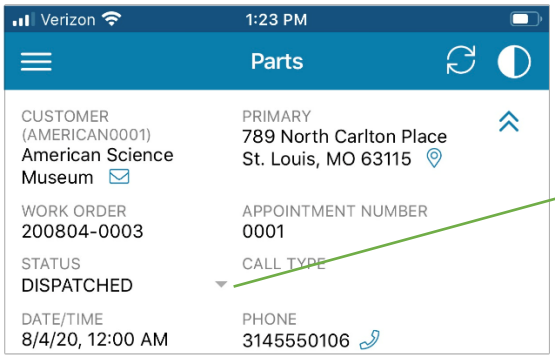
A menu is available by clicking on the Menu icon, which provides a method to return “Home” to your appointment list, or to perform actions that don’t necessarily apply to the particular appointment, but to your work as a whole.



Click the Menu button to display the TechPro menu.

Appointment Status

The appointment status can be changed as you work through the appointment. Each status change sends the new status to the back office as long as the technician is online.



Click here to change the appointment status.

If the technician is offline, and changes the status, when connectivity is returned, the status is updated with most recent status change; but the table will reflect all status changes along with a time stamp of

the time the status changed. This way, if you use the appointment status to track things like SLAs, that data is available.

Completed Appointments

Only parts and labor (using the Timesheet workspace) can be entered on a completed appointment if your system is set up to allow you to do so. After a work order status is closed, the appointments are no longer available in the app.

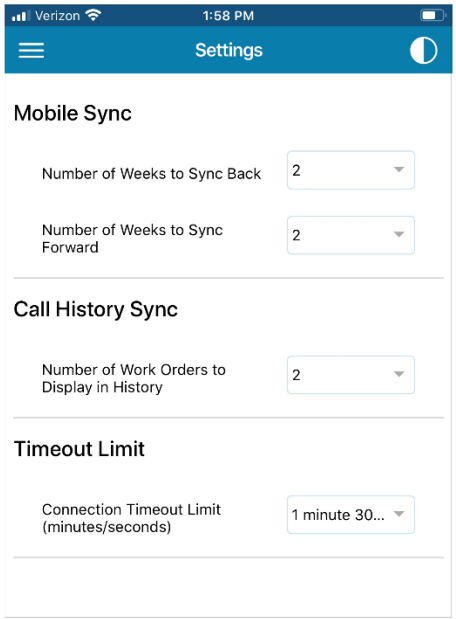
Syncing between multiple devices

You can switch from one device to another without logging in and out of one or the other. You need to sync on the first device to send any information to the back office, and sync again on the second device to be sure that the second device is up to date with information.

TechPro stores appointment data locally on the device during the appointment. So, switching devices mid-appointment does not bring data to another device, regardless of the sync. Only data that has been sent and saved in the back office is synced to a second device.

TechPro Settings

TechPro settings apply to your app, wherever you are logged in. To open, click the Menu icon then click **Settings**.



Mobile Sync Use these options to set how much data you want to display on the Appointment workspace when you sync. Appointments are provided by date, so the number of weeks back or forward bring any appointments assigned to you for that many weeks into the app. For example, if you are assigned appointments on a daily basis, you'll only need to sync forward 1 week; but if your organization schedules appointments and assigns them forward as they come in, syncing several weeks forward gives you a better picture of your upcoming calendar.

Call History Sync This option allows you to set how much call history you want to display for a customer location. In the History workspace, when you click Get More History, the number you set here is the number of records brought into the app. If your work requires a lot of research into past appointments, select a larger number; if you prefer as little information as possible, select a smaller number.

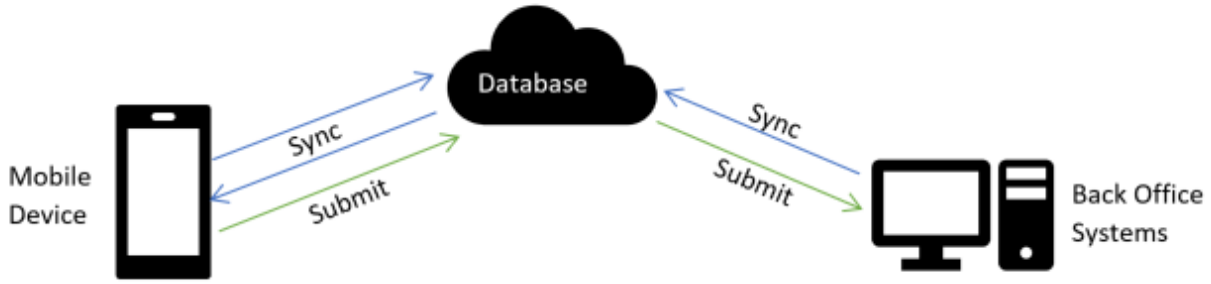
Timeout Limit Select how much time you want to wait for a connection to be made before the TechPro app times out. If a connection isn't made after the amount of time selected, an error appears.

Syncing Your App

Syncing brings the appointments you're assigned to your device, as well as other data you may need to complete a work order. You may want to periodically sync your data which ensures the information entered in the back office is brought into the app. The Sync button is available in the app at the very top right of your screen:

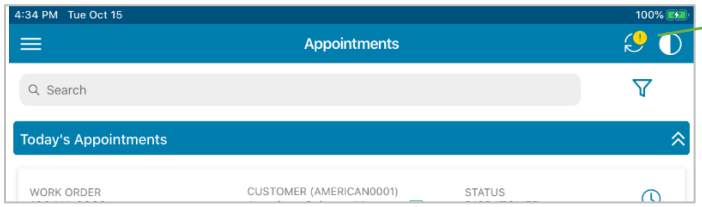
Sync button

Syncing *does not* send everything you've entered to the back office. We recommend syncing as you start an appointment and before you check out, at a minimum, more as needed. When you submit at checkout, all information is sent to the back office, and the back-office application is updated with the data.



It is important to let the app finish syncing. The app can be sent to the background, but it should not be closed. An incomplete sync may cause incomplete data to be brought to the device.

Sync error indicator This indicates to the technician that a sync did not complete as expected. This may be because the device is offline, or because there was an error in the information sent.



Sync button with error condition

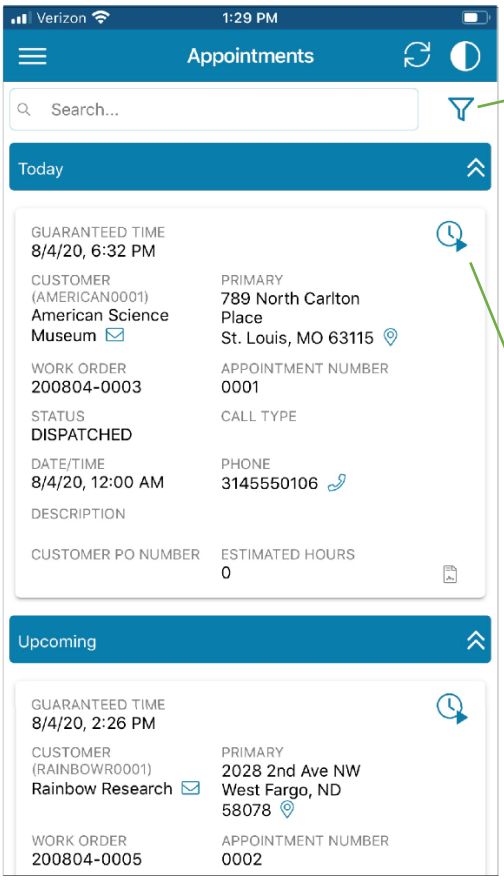
When an indicator is displayed, first check for connectivity.

- If the device is offline, sync again when you're back online. The indicator disappears if the sync is successful.

- If the device is connected, there is another issue, which may be a data problem. Before syncing again, notify your TechPro administrator of the indicator. This person should first view the Checkout Log and Event Log for information and correct any errors in the back office if possible. Then, either the administrator can reprocess or ignore the error in the Reprocess Checkout Log page. Then, you can sync again.

Appointments

The Appointments workspace is also used as your Home page. This is where you will start the work you are assigned. The following is an example of how the appointments appear in the app.



Filter button – click to display filtering options to help limit and sort the appointments that appear in the list. You can also find options for displaying the number of appointments and estimated hours here as well.

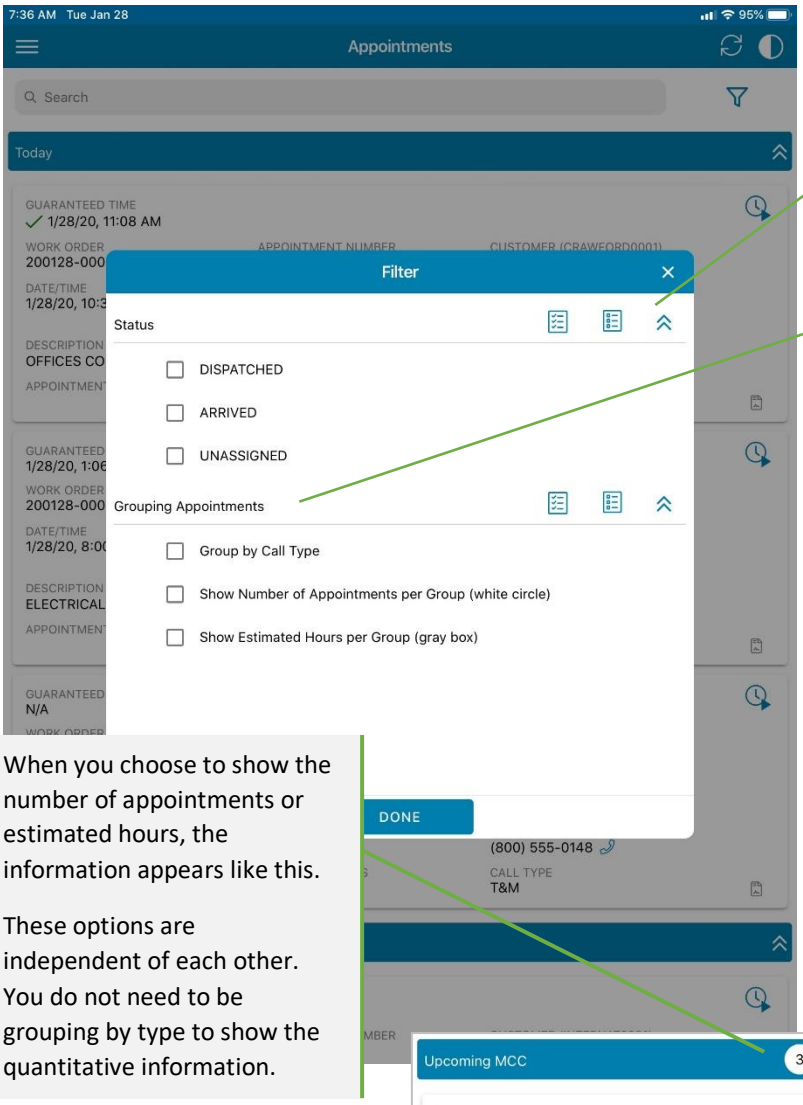
Start and stop the Start/Stop Clock from here instead of from the Time workspace if it's more convenient.

The appointments are grouped by date – Today, Upcoming (which shows according to the number of weeks you selected to sync forward in Settings) and then by other statuses, Pending and Past. (The number of past appointments shown is according to the number of weeks you selected to sync back in Settings. The past appointments are open appointments as of a past date that are not on a closed work order -service call or job – are shown.) Those appointments appear on the app in case you need to perform an action on them, such as order or wait for a part on a pending appointment or enter additional time on a completed appointment.

You may use different naming conventions for your statuses – for example, "Pending" may not be a status in your back-office application, but a status was selected to use for pending in the Admin Site.

Use the Search to type in another parameter to look for, such as the customer name.

Open the filter to limit the appointments shown to a status; the options available are those that are on appointments assigned to you at this time. The list of statuses change as appointment status changes are made.

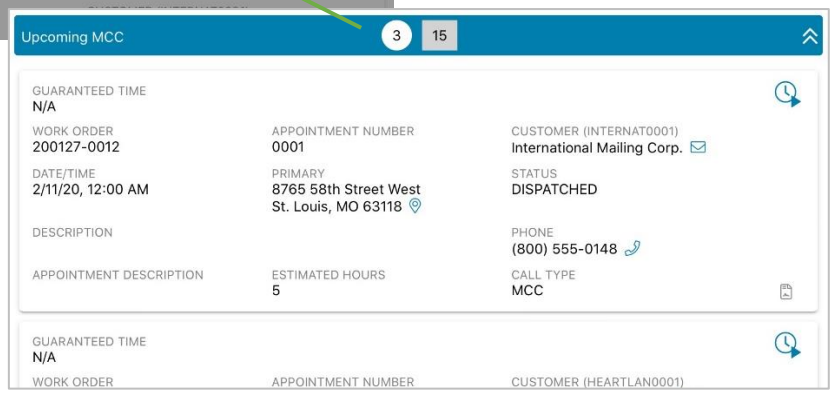


Mark All or Unmark All of the options in the section.

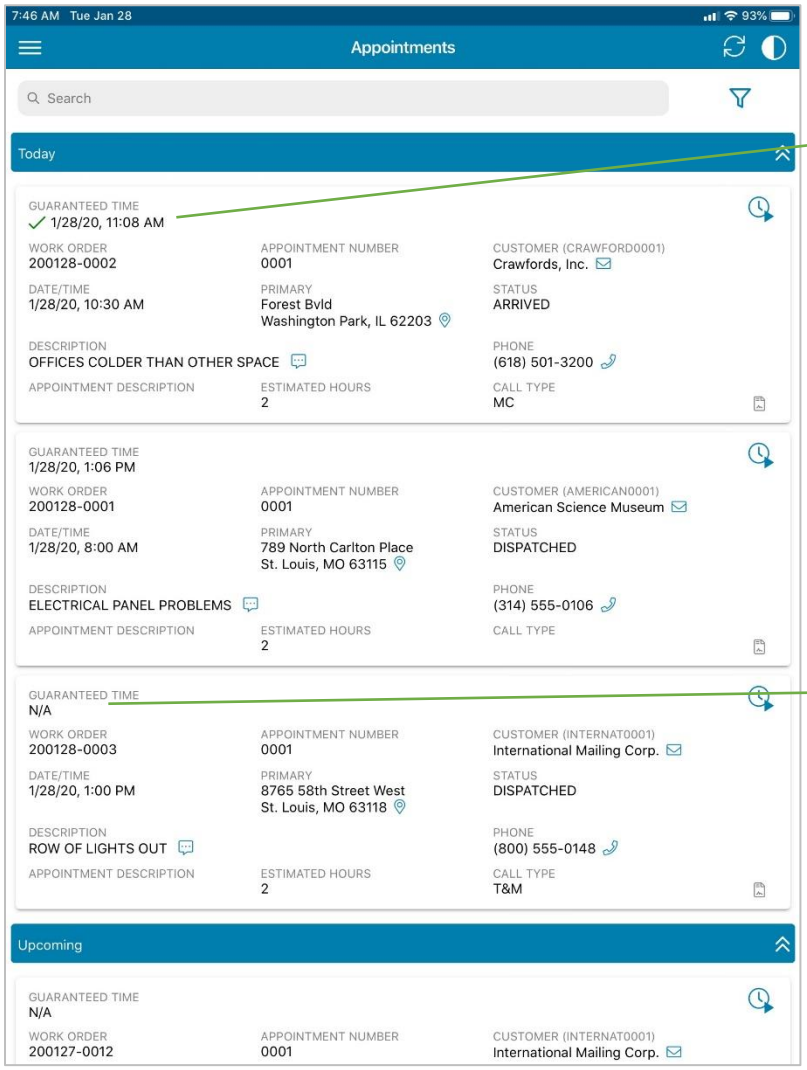
Group all appointments by day and call type. Today's appointments appear first, then grouped by call type according to urgency. If a call isn't assigned a call type, no type is displayed in the title bar.

When you choose to show the number of appointments or estimated hours, the information appears like this.

These options are independent of each other. You do not need to be grouping by type to show the quantitative information.



If your organization uses SLAs, the guaranteed time associated with a customer's SLA is displayed along with a visual cue to help you determine which calls are most urgent. The SLA is associated with a status at the administrative level.



Calls with an SLA display the guaranteed time at the top of the appointment. This field is not displayed if your organization isn't tracking SLAs in the app.
Appointments are sorted in order of urgency, first those with a guaranteed time with the closest one on top, then, for those without an SLA, they are sorted by appointment date/time, then by call number.

Calls with no guaranteed time - which includes MCC calls, and those for customers with no SLA set up – will display N/A under the Guaranteed Time.

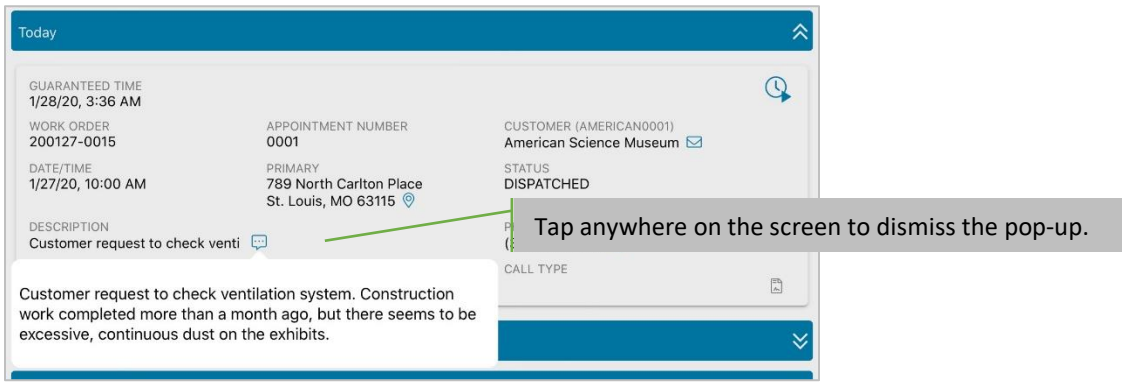
A green check indicator shows that a guaranteed time has been met when the status is changed to the status used for tracking the guaranteed time:

Guaranteed times that are not met are indicated with a red X next to the guaranteed time:

Subsequent appointments for the same service call display the same as the first appointment – either met or as not met, as follow up appointments do not track separate guaranteed times. When multiple technicians are working on the same service call, the first technician to change the status to the one

used for tracking will see the guarantee met. Other technicians see the guarantee is met or unmet accordingly the next time they sync.

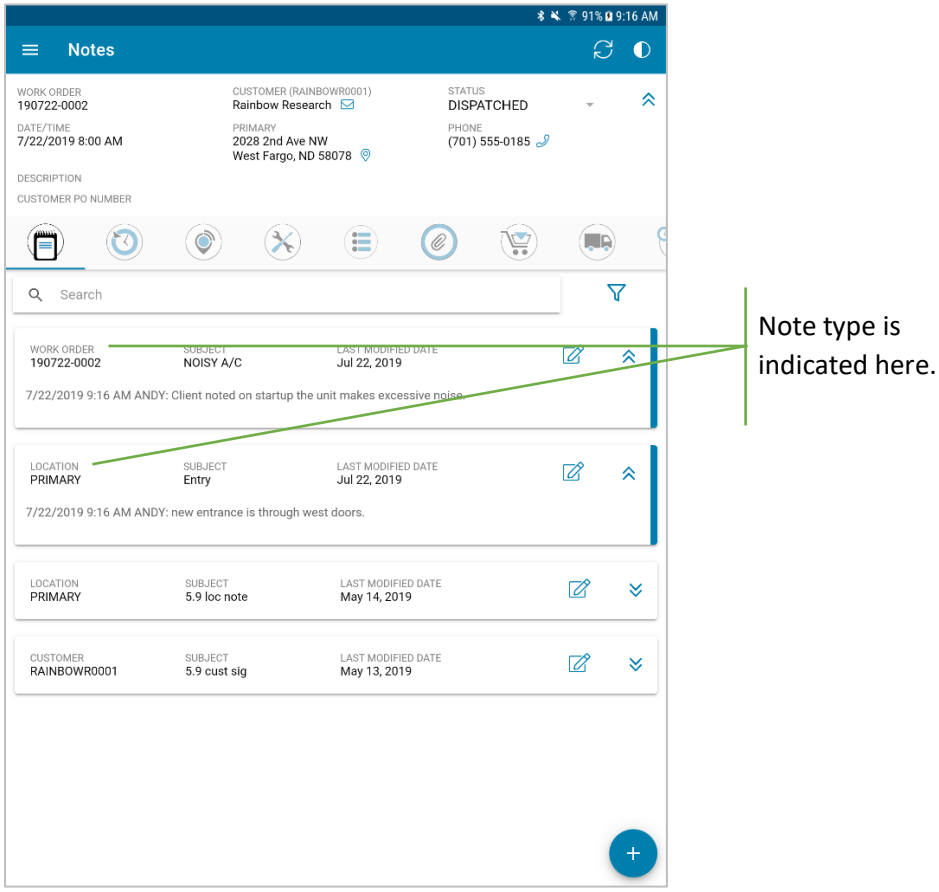
When you see an icon near the Description field it indicates that there is additional description text you can view by clicking the icon.



To begin working an appointment, click it, and the appointment opens to the first workspace in your workflow. If you're opening an appointment you've begun work on, the app opens to the last workspace you were using.

Notes

The Notes workspace displays either customer notes, work order notes, location notes or any combination of the three. You can begin by filtering the notes by type. Note text is searchable using the Search bar. Notes appear in work order, location then customer order.



To Edit a Note

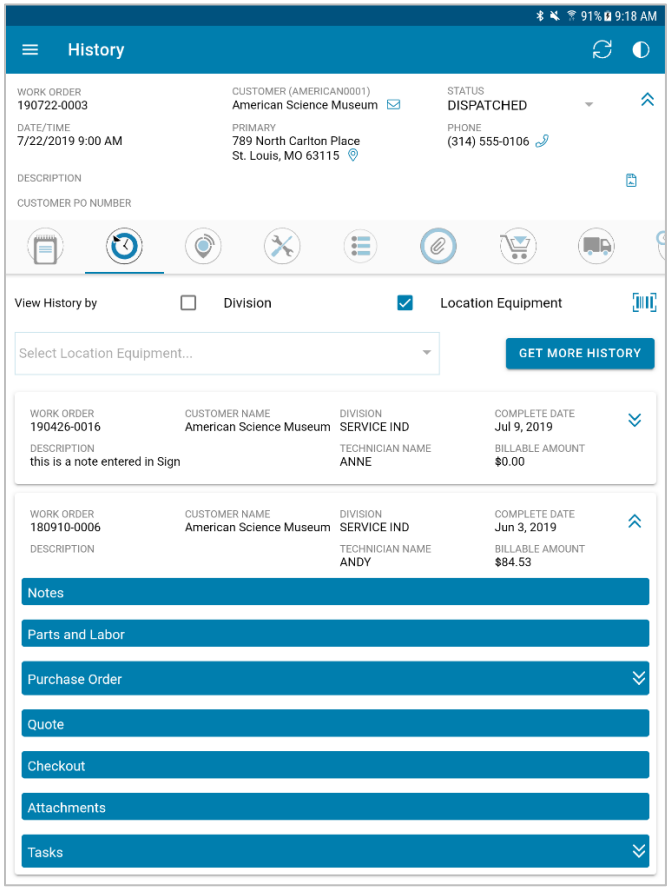
Click the **Edit** button. A text box appears where you can type in your notes. If your device has text-to-speech capability, you can speak your note as well. When you've completed your note, click the OK icon. Your entry is date and time stamped for reference.

To Add a Note

Click the floating **Add** button. Select the appropriate note type and enter a subject for the note. (The Note Type and Note Subject are required fields.) Enter or speak your note information, then either click to add another note, or move to the next workspace. Your new note is saved when you leave the Notes workspace.

History

The History workspace displays the closed work orders for the same location as the appointment you're working, listed by service ticket number or job. All information in this workspace is view only – no changes can be made.



You can show history by division or location equipment. To view by division, select the divisions you want to show history for, click **OK**, then the **Get More History** button. The number of records shown is set in the Settings page. To view more historical records, click **Get More History**. The number of historical records that are retrieved is according to your setting in the Settings page.

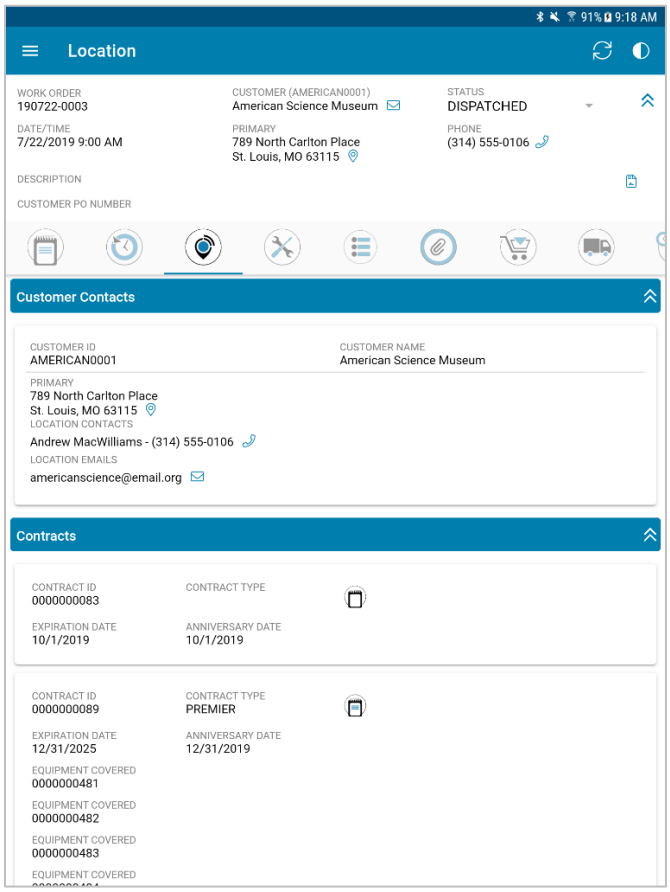
Changing divisions brings back only the first records according to the number of historical records option.

To view by location equipment, select that option then, either scan a barcode or select the equipment from the list. Then, click **Get More History**. The work orders that had this equipment serviced appear.

You can expand and collapse information in this workspace – only areas that show the expand/collapse button have information to expand. If an attachment is available, an attachment icon appears so that you do not have to expand that section unless there is information there.

Location

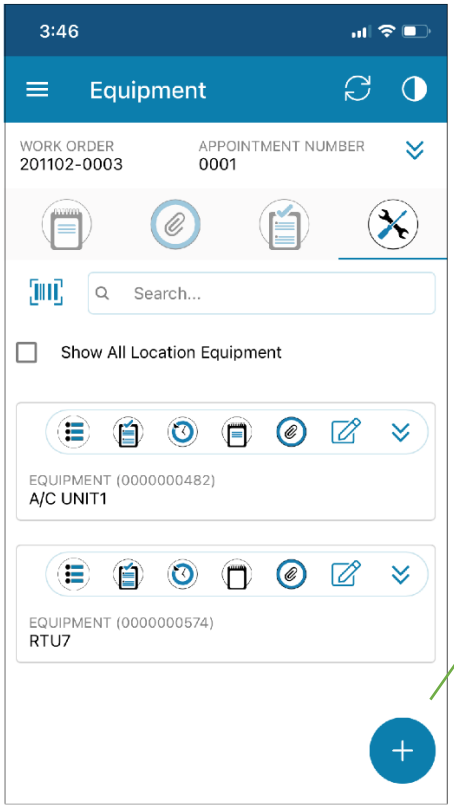
The Location workspace displays customer and contract information for this location. Clicking the icons for email, phone or location opens the appropriate app for immediate use. This workspace is informational only, except for contract notes. Click the Notes icon to add a new note, read or add information to an existing note. The icon appears without lines if no note exists, and with lines if notes have been added either in the back office or in TechPro.



Equipment

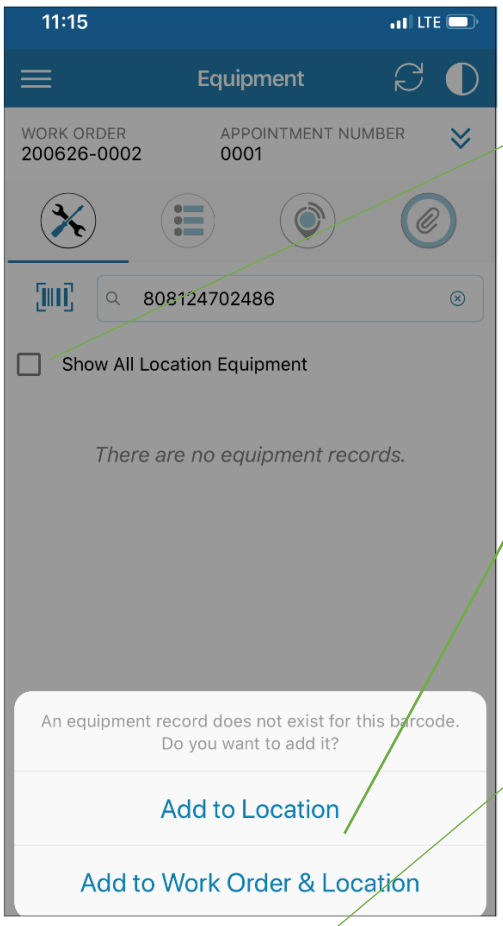
The Equipment workspace is used to track and update equipment at the customer location. Equipment added from the back office, or a previous appointment appears here and can be edited as needed.

The **Show All Location Equipment** option defaults unmarked so that when the Equipment workspace is first opened only equipment on the work order displays. Select this option to display all equipment at the location.



If you have permission to do so, the Add button is visible and equipment can be added from the Equipment workspace.

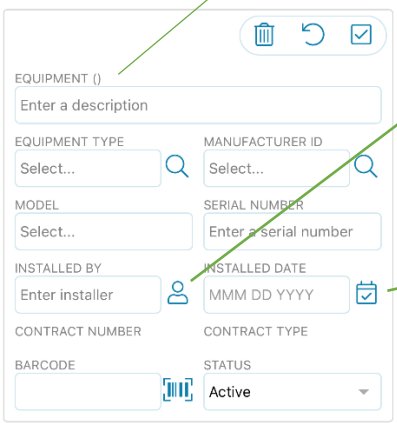
You can also edit or delete equipment, as necessary. Model numbers can be recorded if a manufacturer name has been entered. Equipment may also be added to this workspace from the Tasks, Purchase Order or Parts workspaces or by scanning a barcode that does not exist.



Click to display all location equipment, rather than only the equipment on the call.

When adding by scanning a barcode, you can decide whether you want to add the equipment to the location or to both the location and the work order. If you add to both, an indicator appears by the Equipment ID field to show it was added to the work order.

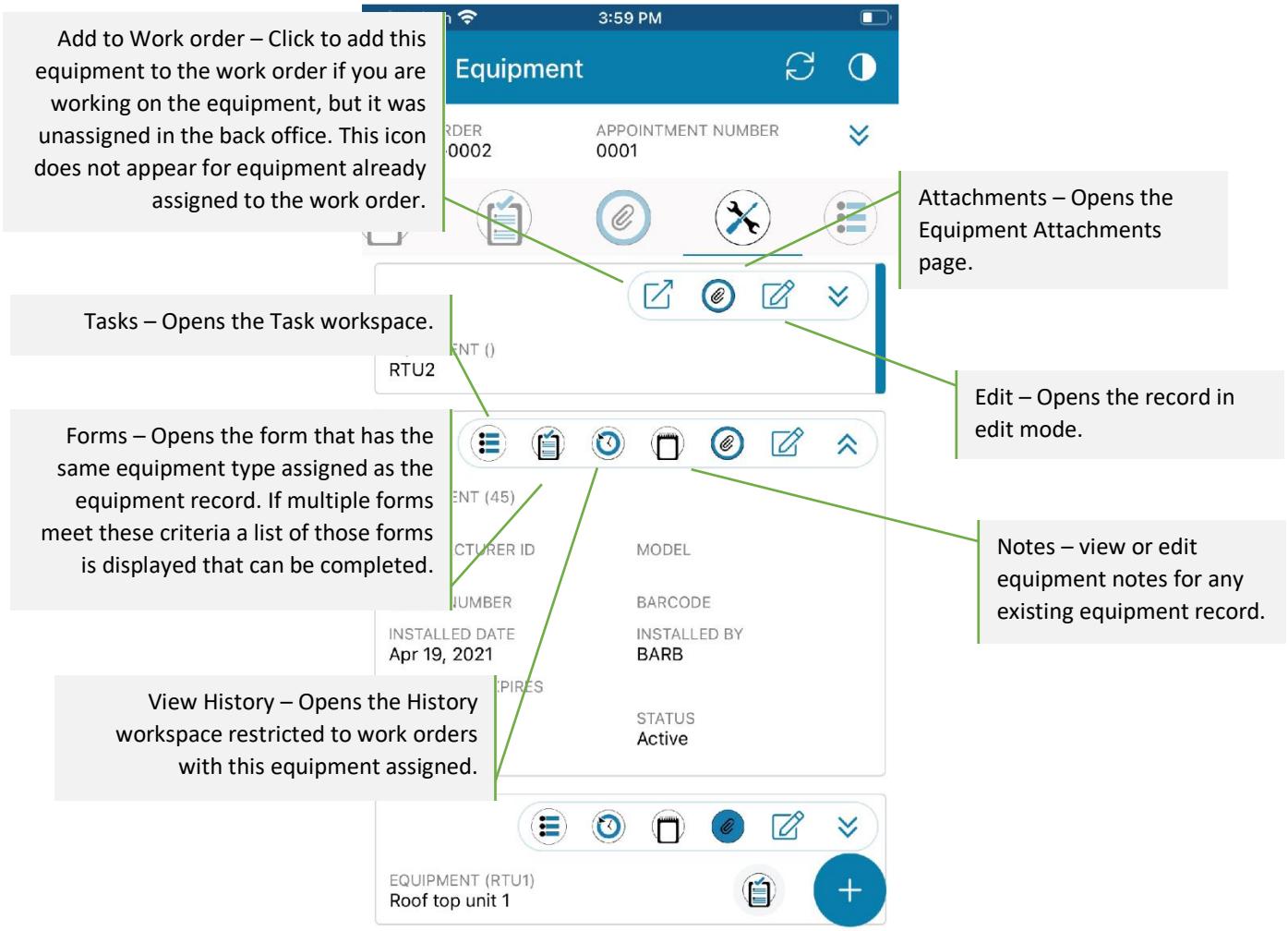
Adding the equipment opens a blank equipment record in edit mode. The scanned barcode is filled in when appropriate.



A single click on the User icon inserts your username. If you did not install the equipment, you can enter another user or leave the field blank.

Likewise, a single click on the Date icon inserts today's date. It can be changed or left blank, as well.

The equipment ID is assigned in the back office when you check out of the appointment. You will see the description you save as the field label until the record is created in the back office. After that, the ID and description comprise the field label together. Those records can be edited in this workspace as needed.



The buttons described are available for existing equipment when the record is not in edit mode.

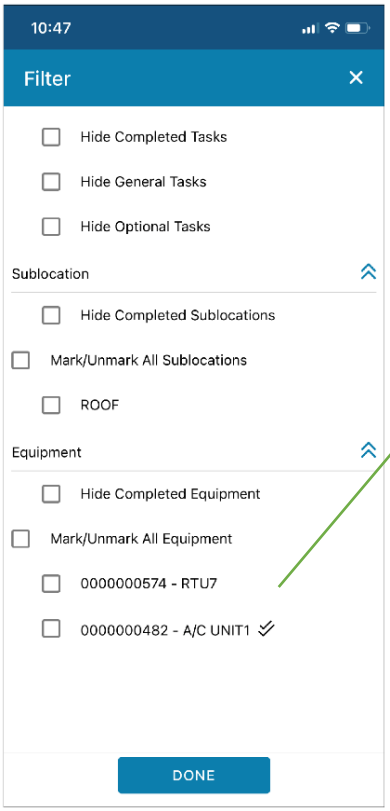
Tasks

This workspace is used to check off items as complete from your task list. This workspace does not appear if the work order is from a job cost appointment. When you open the Tasks workspace, it is always fully collapsed for better performance. This is especially helpful for calls with many equipment records and/or tasks.

You can scan a barcode to quickly find tasks for a specific piece of equipment. If the equipment is not found, you can add it to the location or to the location and work order. You can also add equipment to the work order when the scan finds it on the location, but it's not assigned to the work order.

There are several filters available so that you can find the tasks that apply to the work you need to complete, especially if you're on a customer site with other techs.

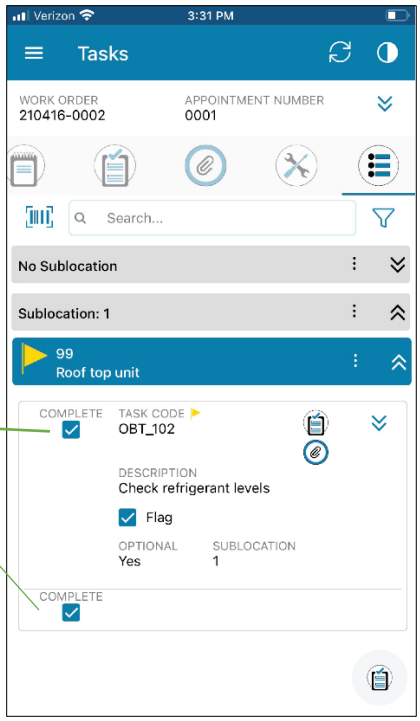
You can filter by sublocation to limit the equipment and tasks in the Tasks workspace to only the sublocation you're working. The Tasks workspace always displays the equipment by sublocation. Further filter by equipment to limit the workspace to your more specific tasks at hand.



If you mark to filter by a sublocation, the equipment that is not at that sublocation appear disabled in the Equipment section of the filter. This helps you quickly identify equipment you may be looking for. Additionally, double checkmarks appear next to sublocations or equipment which have all tasks completed.

1. Select the filters you want to display the tasks you need to complete. When you've completed your filter selections, click **Done** to display the tasks that match. You can change your filters as you work to modify the equipment and tasks you need to accomplish. If you have the Hide Completed Tasks, Hide Completed Sublocations, and Hide Completed Equipment options marked on the Tasks filter, tasks, sublocations and equipment are removed from the workspace as they are marked completed. We recommend that you mark all three options to clear the workspace entirely when everything is complete.
2. Expand the equipment you're working on and enter any responses and mark the task complete. You can mark either of the Complete boxes to indicate it's complete.

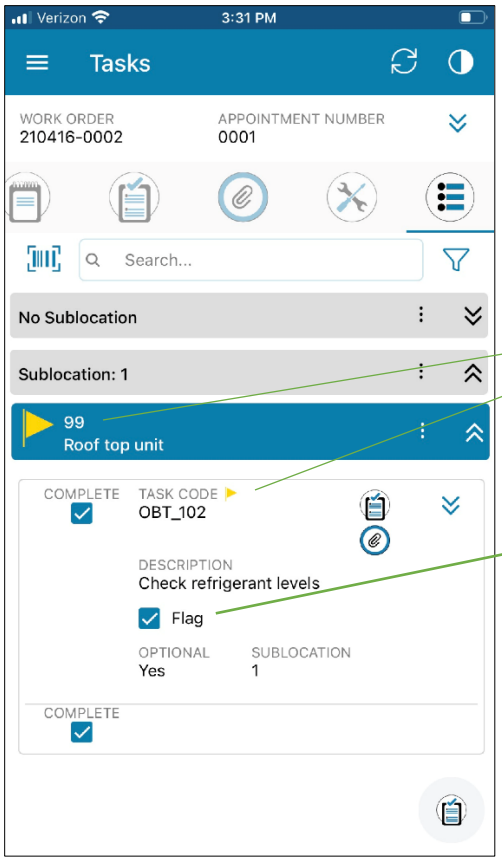
Complete checkboxes mirror each other. If you mark one the other is marked as well.



The Complete checkbox at the top of the task and the one at the bottom mirror each other, so you can click the bottom one if you have a lot of task responses and subtasks instead of scrolling back up. Depending on whether the option to auto-complete subtasks with task completion setting, the subtasks may or may not be marked complete when you complete the task.

If you have the Allow Technicians to Flag Tasks option marked in the Admin site, a Flag checkbox appears. Mark the Flag option to indicate a task is causing the equipment to be out of compliance (or anything else you choose to flag a task for). When the Flag option is marked a yellow flag appears next to the Task Code and the equipment header to easily identify the task and associated equipment.

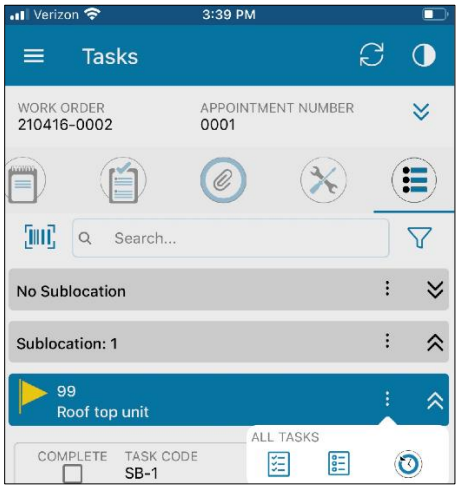
The flag will remain marked until it's unmarked on another call or appointment.



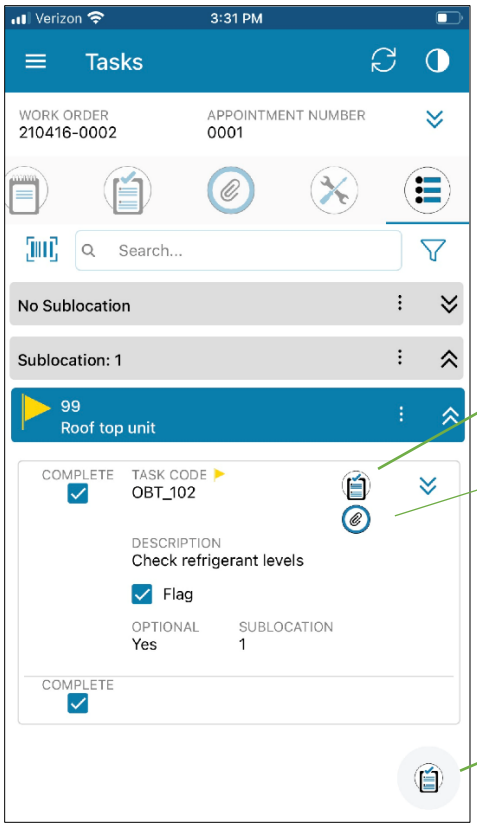
After marking the Flag checkbox, a yellow flag appears next to Task Code label and the equipment header.

3. If you're working through a large number of tasks with responses, you can get the information into the response fields, then mark all the tasks for the equipment complete at once using the Mark All button on the Equipment header bar.

   You can also mark tasks for the equipment at the sublocation level at once:



   When using the Mark All options, only tasks for the equipment selected in the filter are marked complete. Double-check the equipment and tasks that weren't completed by re-filtering the information or by checking all equipment at a sublocation has the double-check indicator.



Click to open the forms that are associated with the task code.

Click to open the Task Attachments page.

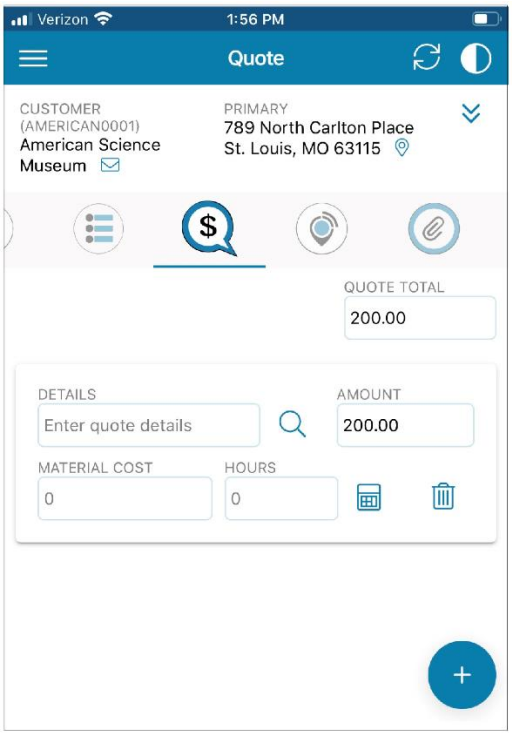
Click to open the forms that are associated with the task.

4. Click the Attachment icon to open the Task Attachments window to attach a photo or image to the task. Click the floating Add button and take a photo or select one from your gallery. The workspace works very similarly to the Attachments workspace. Enter a caption tag and caption, then click Done. Caption tags can be viewed in Signature in the Document List window.
5. Continue to do your work until you've completed all the tasks you need to complete.

TechPro Quotes

This workspace is available only if TechPro is set up to Use TechPro Quotes for Flat Rate Billing and is used to arrive at the quote amount that will be used to charge the customer for the appointment. Unless the appointment is at no charge, a quote total is required.

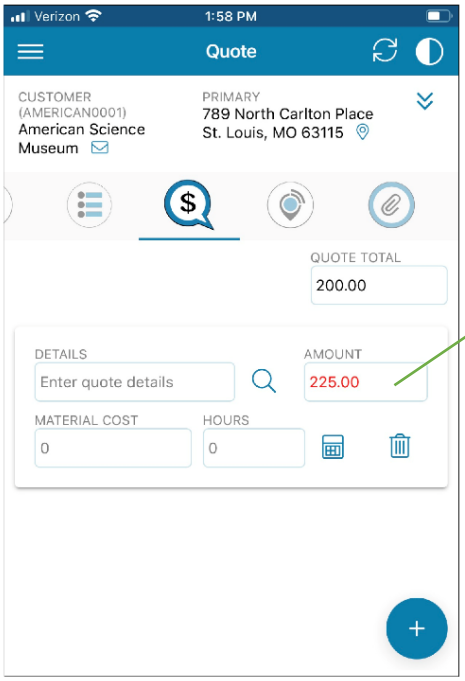
If you're working on a maintenance type call or a job appointment, this workspace is not available.



Quote amounts can be entered in one of three ways:

1. Enter only the amount you're charging. If you use a price book, you can use your book to simply enter an amount in the **Quote Total** field for the work you're providing.
2. Enter labor items. Use the Details lookup and select an inventory or labor item. The price associated with the item appears.
3. Use the pricing matrix. You must have the Use Quote Pricing Matrix toggle on in the Admin site to use the pricing matrix. Don't enter anything in the Details field if you are using the pricing matrix. Instead, enter either the material cost *or* the hours and click (Calculate button). The matrix in the background will be used to calculate the extended price for the material cost or number of hours.

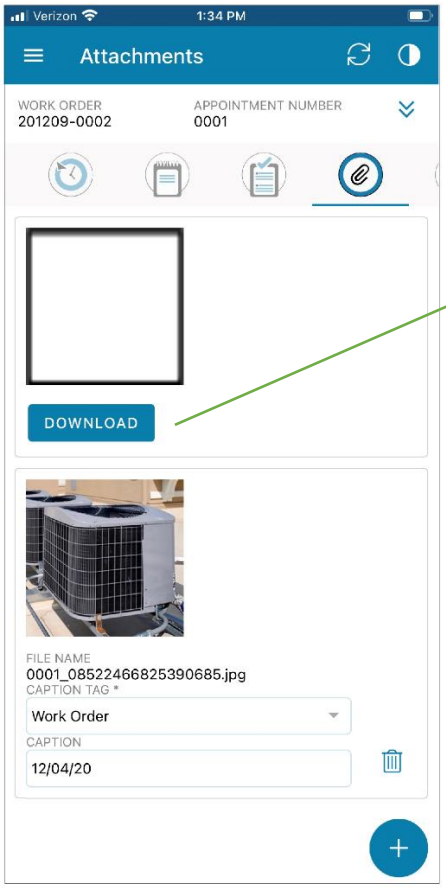
As lines are entered, the Quote Total will continue to calculate the line amounts. This amount can be overridden, in which case, the line amount totals will appear in red text. This indicates that the lines no longer add up to the Quote Total.



In this example, the hours calculated an amount of $225.00. That amount was overridden in the Quote Total as $200.00, so the $250.00 amount is red. Adding more lines will recalculate the Quote amount.

Attachments

The Attachments workspace allows you to take and attach photos to the appointment and download and view attachments from the back office, if your device has an app that can open attachments of that type. If your device doesn't have a camera function, you can attach photos from your photo gallery if you have one.



If you are connected, you can download attachments entered in the back office, and view them on your device. Attachments that have been downloaded can be viewed offline.

To Attach a Photo:

1. Click the Gallery or Camera icon next to the floating Add button.
2. Take or select the photo, depending on which icon you clicked. (Only one photo can be attached from your photo gallery at a time.)
3. The photo will appear in the workspace with an auto-generated name indicating the appointment number and unique ID number.

   The photo can be deleted using the Delete icon. Start back at step 1 to continue adding photos to the appointment.
4. Enter a caption tag and caption. Caption tags can be viewed in Signature in the Document List window.

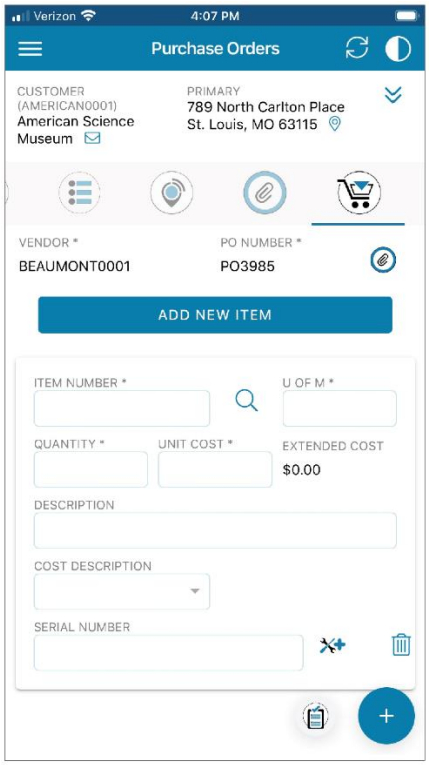
Photos are added to the back-office tables and are attached to the work order or job in the back office.

Purchase Orders

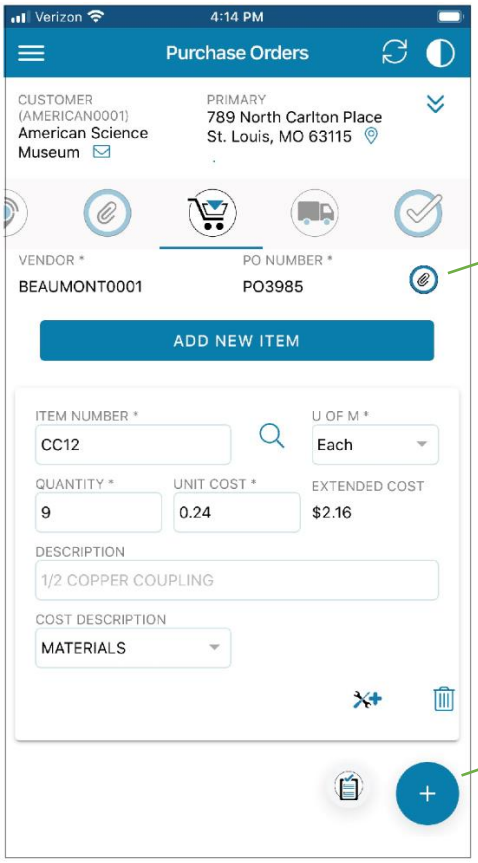
This workspace allows you to get a purchase order (PO) number and enter a purchase order as you're at the vendor getting parts for the appointment, rather than using parts from assigned inventory sites. There is no need to call the office to get the number or wait to enter the information until later.

If you don't have a Wi-Fi or data connection, you can't get the PO number. If traveling to a vendor that you know doesn't have a good connection, get the PO number before you leave the office.

1. Click the floating **Add** button.
2. Select the vendor you'll be purchasing from. Only approved vendors will appear in the list.
3. Click **Get PO Number**. A PO number will be retrieved from the back-office system and appear in the field. It may take a few seconds.



4. Once you have the PO number, click **Add New Item**. Then enter or select an item number.



Add Attachment icon. The icon will appear filled in if an attachment exists.

Add to Equipment icon

You can use the lookup button to select items. You will need to select a filter and click **Done**, or search by typing a few letters and then click the lookup button at the end of the Search bar to begin the search. You can also select filters, then search on the results to further limit the number of items to select.

A non-inventory item can be entered by typing in an item number that does not exist in the system.

5. Enter the unit of measure you're purchasing the item in and then the quantity. (If the item is a serialized item, you'll be able to enter only one item at a time so that the serial number can be recorded.)

6. The unit cost will appear based on the U of M for the item, if the item is from inventory and can be changed. For a non-inventory item, enter a unit cost if one does not default for you. The extended cost will be calculated based on the quantity and unit cost.

7. The description will appear for inventory items. For a non-inventory item, enter a description if the item number does not appear as a default.

8. If the item is a serialized item, enter the serial number.

9. For items that will be tracked as equipment at the location, you can click the Add to Equipment icon. This will add the record to the Equipment workspace. Additional information tracked for equipment can be entered in that workspace, such as manufacturer and model number.

10. Additional items for this vendor and PO can be added by clicking the Add More Items button. Items you enter can be deleted using the delete button.

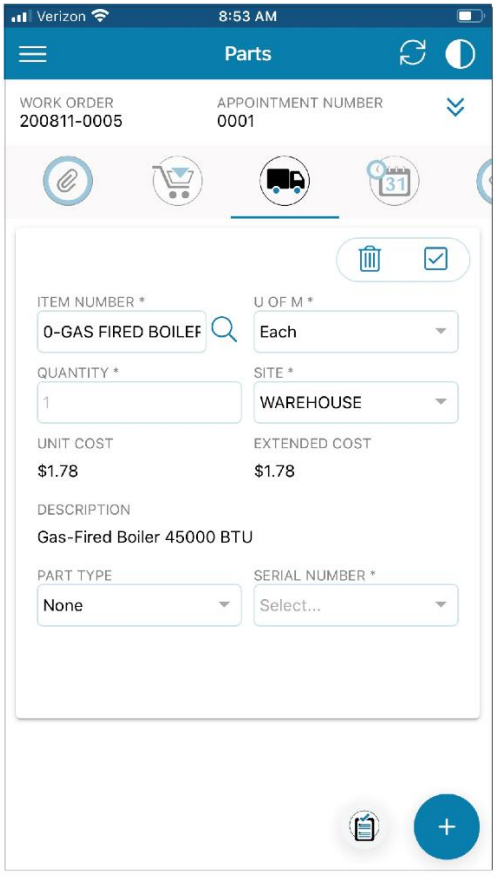
11. Click the Add Attachment icon to attach a photo or image to the PO, for example, if you need to attach the receipt to the PO. This will open the Purchase Order Attachments window. Click the floating Add button and take a photo or select one from your gallery. This workspace works very similarly to the Attachments workspace, if you need additional details click this link. Enter a caption and click **Done**.

    You can add another purchase order by clicking the floating **Add** button again and repeating the steps above.

Once a PO number has been retrieved, you can't delete it. A purchase order with no line items will be voided in the back office when you check out.

Parts

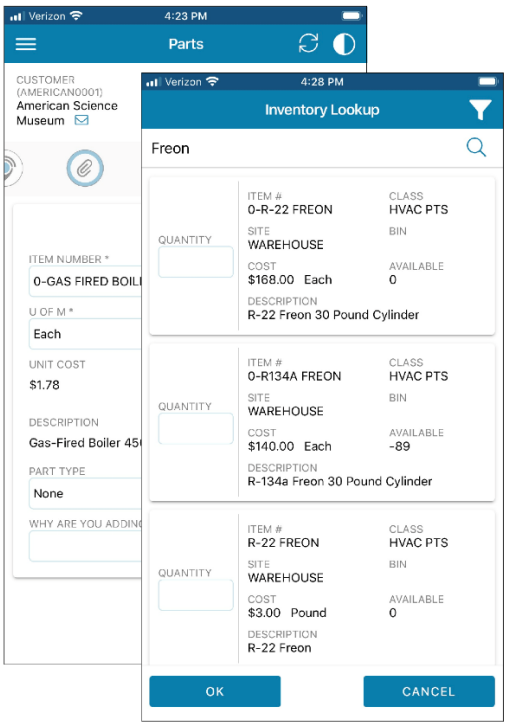
The Parts workspace is used to record the parts from your assigned inventory sites used on an appointment. These items will reduce inventory levels at the site. (Items can be entered directly from your warehouse, or any other site assigned to you, if needed by selecting the appropriate site.) Any parts that were entered directly from the warehouse to the work site using a back-office transaction, will appear and can't be deleted.



1. Click the floating **Add** button.

2. Enter or select an inventory item.

   Use the lookup button to select items and see quantities available. Select a filter and click **Done**, or search by typing a few letters and then click the lookup button at the end of the Search bar. You can also select filters, then search on the results to further limit the number of items to select.



3. Enter the unit of measure for the item in and then the quantity. (If the item is a serialized item, you'll be able to enter only one item at a time so that the serial number can be recorded.) The unit cost will appear based on the U of M for the item. The extended cost will be calculated based on the quantity and unit cost.

4. Select the site that will be reduced by the quantity entered. This will likely be your truck site, but other sites can be selected. (If you selected the item using the lookup button, the site you selected the item from will appear and can't be changed.) Only sites that have been approved for you will be in the list.

5. If the item is a serialized item, select the serial number.

6. Select a part type or else select **None**.

7. The description will appear for the item.

8. For items that will be tracked as equipment at the location, you can click the Add to Equipment icon. This will add the record to the Equipment workspace. Additional information tracked for equipment can be entered in that workspace, such as manufacturer and model number.

9. Additional parts can be recorded by clicking the floating Add button again and repeating the previous steps.

Items that you've entered in this workspace can be deleted.

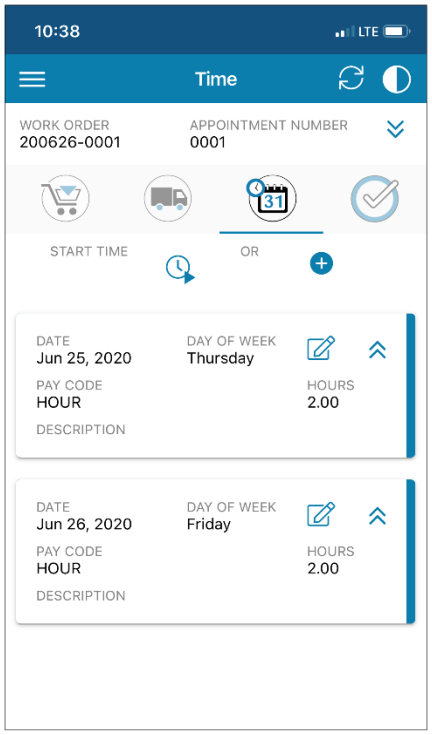
On a completed appointment, you can enter parts that were not added during the appointment, or replace parts using a negative quantity.

Time

The Time workspace is used for entering billable time for the appointment. You can enter time in two different ways:

- Use the Start/Stop Clock to automatically calculate the hours worked.
- Use the Add button to manually enter the hours worked.

(A combination of the two can also be used.)



Using the Start/Stop Clock

1. Click the **Start** icon to begin timing your appointment. Whenever the clock is started, the start time appears, and the icon changes so that you can use the same button to stop the clock. The clock can be started from either the Appointments workspace or from here, in the Time Workspace.
2. Click the **Stop** icon when you need to stop the clock. A time record appears in the workspace with the start and stop time recorded in the Description field and the number of hours calculated, rounded if necessary, and displayed.
3. Enter the pay code and a description.
4. Click the **OK** button to save your entries.

You can start and stop the clock as many times as you need to complete the appointment. For example, if you take a lunch break, you can stop the clock, and restart it when you return to work.

Use the Add button

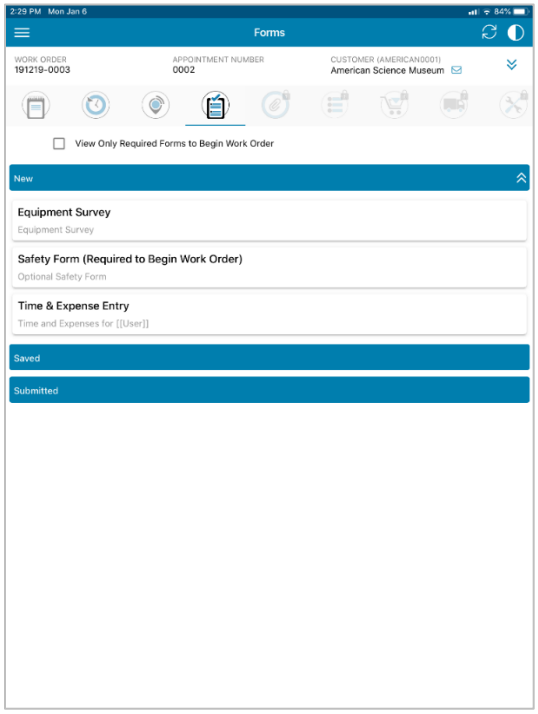
1. Click the **Add** button to manually add a time record to the workspace.
2. Enter the number of hours, the pay code and a description if needed.
3. Click the **OK** button to save your entries.

Tips:

- The start and end time can be edited the **Allow Technicians to Edit Start/Stop Times** toggle is on in the Admin site. You can edit the pay code and description. If any of the automatic entries are incorrect, for example, if you stopped the clock too late, you could delete the whole-time entry and record the hours manually.
- Manual entries can be deleted as well. Swipe to the left to delete a line.
- Only one pay code can be entered per line. Splitting time can be accomplished a number of ways. Be sure to stop the clock, then start again when you need to calculate time for two pay codes, such as regular pay and overtime. Or stop the clock for one code, then manually enter a line for the other pay code. Or manually enter both.
- Only one Start/Stop Clock can be running at a time. For example, you can't be automatically calculating time between two work orders at the same time.

Forms

If your system is set up to integrate with FormsPro, you'll see a Forms icon and workspace.

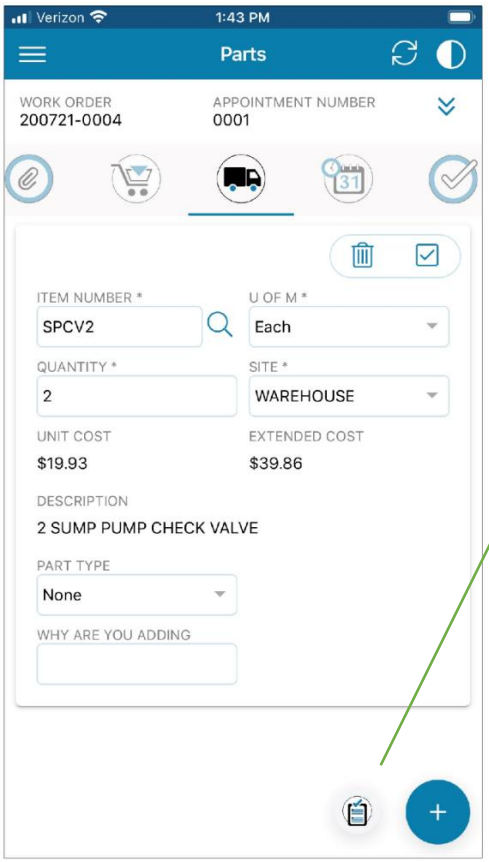


It is important to distinguish the differences between using FormsPro and using the integration; because you may still have forms you need to complete that are outside of the TechPro integration.

- You may see some workspaces are locked, as in the screenshot above. This indicates that you have a form that must be completed prior to working the rest of the work order. Any of the workspaces to the left of the Forms icon can be opened and used, those to the right will remain locked until the forms indicated with (Required to Begin Work Order) after the form name have been submitted. A saved, required form will not unlock the workspaces.
- If you start a form from TechPro, you won't be able access the started form from FormsPro. Saved forms can be accessed from the Forms workspace under the Saved section.
- You may not have the same email options on the form when starting from TechPro.
- Use the Back or Save buttons within the apps to move back and forth between products rather than the FormsPro link (on iOS) or switching apps using the device controls.
- Don't close FormsPro when you've started a form from TechPro, as you may lose some of your work. If you must close FormsPro, save your form first.
- A sync will occur if you open a FormsPro form from TechPro without first opening FormsPro and having it running the background. Your forms will open more quickly if you open FormsPro before starting TechPro.
- When you submit a form started in TechPro, the form is considered complete and can't be changed. It will be held until you complete your checkout and emailed with the work order reports at that time.

  There may be form reports that are set up so to be withheld from the email to a customer; for example, internal Good Work forms or expense claims that the customer doesn't need at this stage. Be sure to include yourself in the email at checkout so that you receive a copy of all submitted form reports.

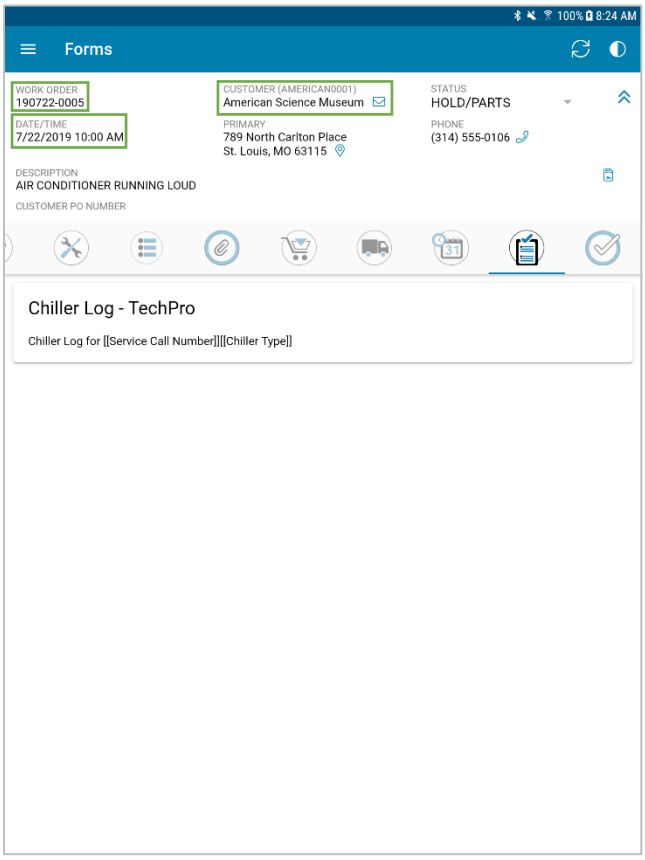
- If you are working offline, and a form was submitted while offline, it will be stored and submitted with the checkout. In addition, if you check out while offline, forms will be stored and submitted with the rest of the work order when a connection has been made.
- If the **Workspace to Open Form from** field on the Form Options page has a selection made, the applicable workspace(s) will have the Forms icon in the lower-right corner of your device. In the following illustration, the form was added to the Parts workspace.

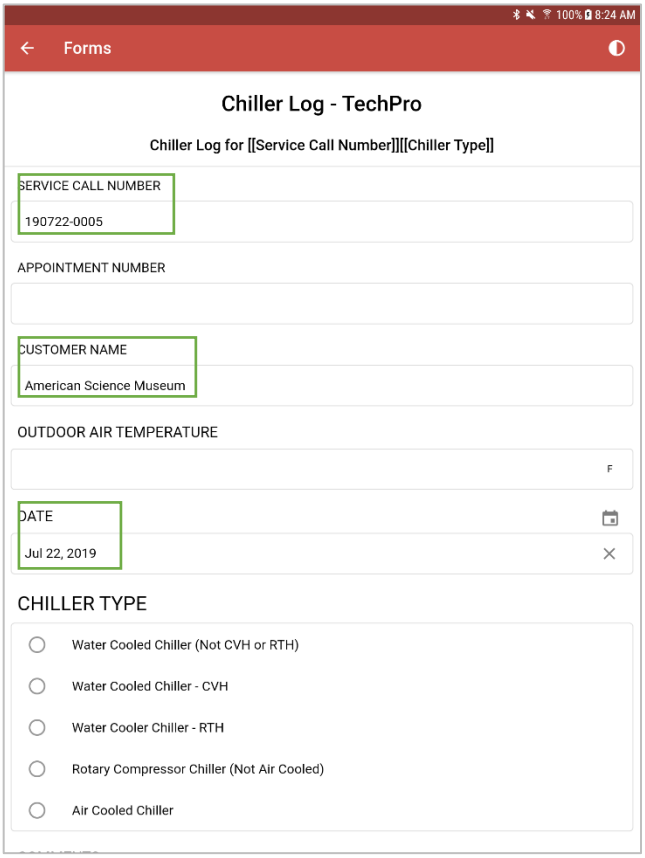


Click the Forms icon to open the Forms list and select the form you want to work on.

You can complete any form that's not required prior to beginning the work order at any time.

1. Click the form name to open the form.

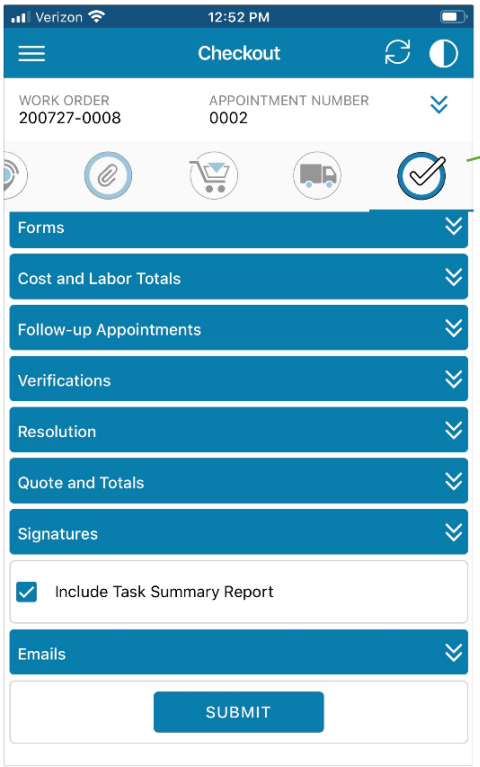




2. Complete the form according to your company procedures. Depending on how your system is set up, fields from TechPro may auto-populate fields on the form, as in the above screen shots.
3. When the form is complete, click **Submit**.
4. The Forms workspace in TechPro will reopen, and you can repeat these steps to complete any additional forms necessary to complete your work.

Checkout

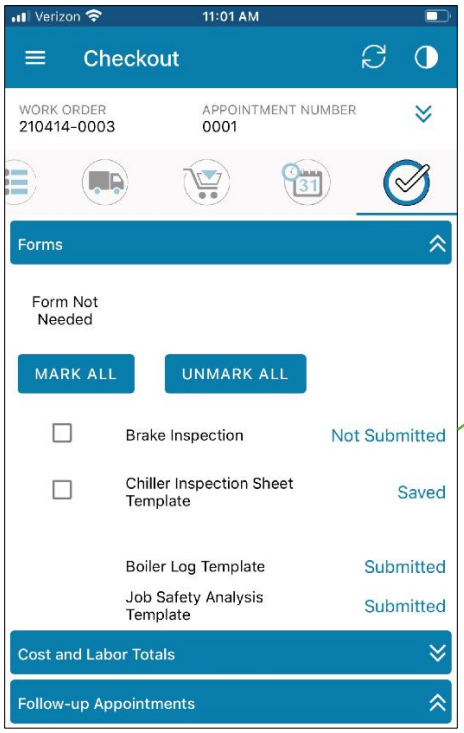
Once all the work on the appointment is completed, you can use the Checkout workspace to complete the appointment. This workspace has different sections and fields available depending on different settings and how the Checkout Field Designer is configured. For example, billing and payment information is shown only if you are using TechPro Quotes.



This illustration displays the Checkout workspace with all the sections collapsed. Each section is described in the following procedure.

1. Expand the **Forms** section to view the forms assigned to this work order along with their form status.

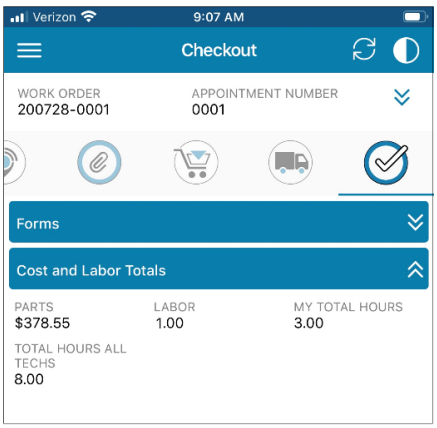
   If you are *not* using a FormsPro integrated version of TechPro, or the Forms workspace is hidden skip to step 3.



Click a form's status link to complete the form or view a preview of a submitted form.

2. If any of the forms are not needed for this work order, mark the **Form Not Needed** box next to the form. If none of the forms are needed for this work order, click the Mark All button to mark every form. This allows you to check out without submitting the form. Forms that have not yet been submitted can be completed by clicking the status link and completing the form according to your company procedures. A report preview of any submitted forms can be viewed by clicking the **Submitted** status.

3. Expand the **Costs and Labor Totals** section to view the parts and labor costs for the work order. The fields displayed in this section may differ depending on how the Checkout Field Designer has been configured.

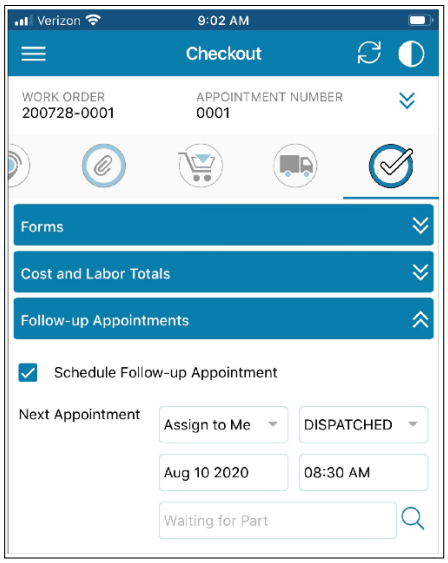


Field	Description
Parts and Purchase Orders	Displays parts and purchase order costs for *all* appointments on this work order.
Labor	Displays the labor total for the *current* appointment only.

My Total Hours	Displays the total hours entered for the technician on the work order.
Total Hours All Techs	Displays the total hours entered for *all* technicians on the work order.

The My Total Hours and Total Hours All Techs fields may not display accurately until the appointment is checked out.

4. Expand the **Follow-up Appointments** section to manage any follow-up appointments.

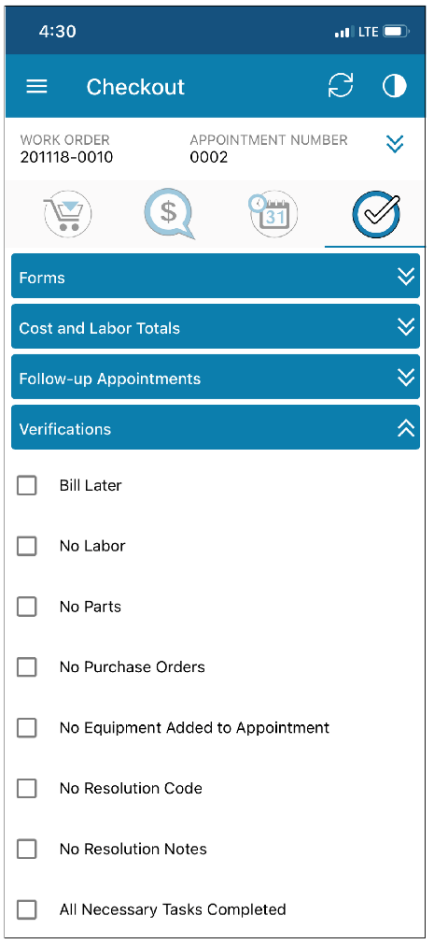


If you have no more work to complete on this appointment, leave the **Schedule Follow-Up Appointment** option unmarked.

If you have additional work and you are responsible for scheduling a follow up appointment, mark **Schedule Follow-Up Appointment**. Then, select whether you want the follow up appointment to be assigned to you, or choose **Leave Unassigned** if the dispatchers should assign it to another technician. Enter or accept the default status, then select a date and enter or select the default time for the follow up. Enter an appointment description or select a predefined description. If you choose Other, you may be required to enter information in another field.

5. Expand the **Verifications** section. The options displayed in this section appear if TechPro was set up on the Checkout tab of the App Settings page to warn you if no entries were made in those workspaces.

Mark the options that, if there is no entry, you do not want to be warned about when submitting your checkout.

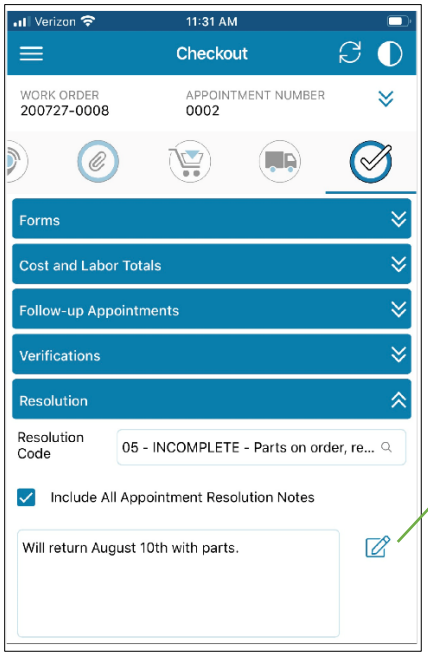


Field	Description
Bill Later	Select if this work order is to be invoiced from the back office. You can still enter pre-payment or partial payments for an invoice with this option marked. Note: This option is only available if you are using TechPro Quotes.
No Labor	Select if no labor costs are being accounted for on this appointment.
No Parts	Select if no new parts have been added.
No Purchase Orders	Select if no purchase orders have been added.
No Purchase Order Attachment	Select if a purchase order was added to the call and you don't intend to attach a purchase order record, such as a packing slip.
No Equipment Added to Appointment	Select if no equipment was added to the appointment.
No Resolution Code	Select if no resolution code is required.
No Resolution Notes	Select if no resolution notes are required.
All Necessary Tasks Completed	Select if all the necessary tasks have been completed on this appointment. Any tasks that are left incomplete are sent to Signature with the status specified on the Tasks tab of the App Settings page.

Depending on whether you need to collect payment for this appointment, you can continue with the next steps, or skip the steps that aren't required by your organization. When you click Submit, this

information is sent to the back office. The next time you sync, this new appointment appears in your Appointments list.

6. Expand the **Resolution** section.

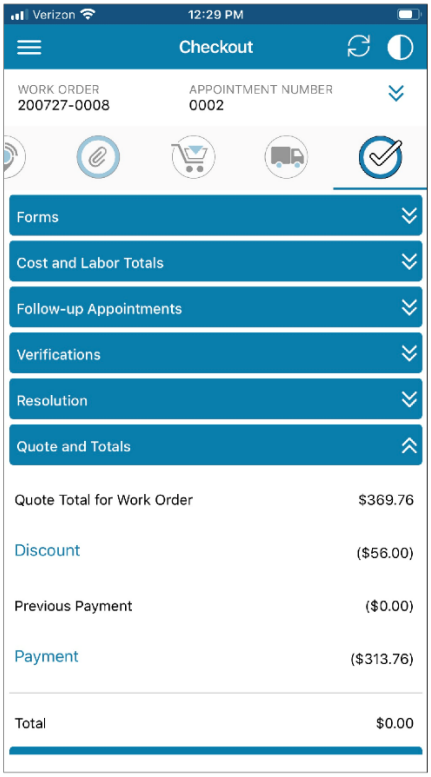


Click Edit to open the Resolution Notes window.

Select a resolution code if your organization utilizes that information. The code entered on a previous appointment for the same call will appear but can be changed by selecting a different one from the list.

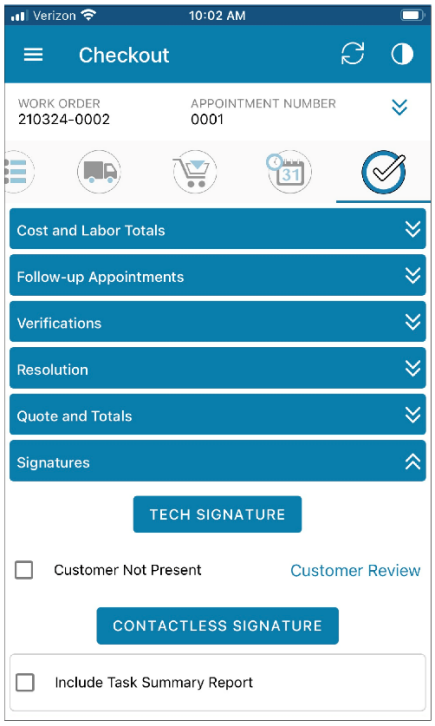
7. Select the **Include All Appointment Resolution Notes** option to display all resolution notes for this work order in addition to only those for the appointment. Enter a resolution note for this appointment by typing in the box or clicking the **Edit** button to open a window for more room to write your note. Be as descriptive as possible but remember that whatever you enter here will appear on the Work Order Summary report, which may be sent to the customer.

8. Expand the **Quote and Totals** section to enter payment information (if needed and using TechPro Quotes).



Field	Description
Quote Total for Work Order	Displays the total quote amount for *all* appointments on this work order, including this appointment.
Discount	If the customer is offered a discount on the appointment, click the Discount label to open a window to select the discount. If the customer has a contract, a discount will default automatically, if set up to do so. If your organization has a limit on discounts, you will be able to enter discounts only up to the threshold set up. If multiple discounts are entered with a mix of amount and percentages, the amounts are calculated prior to the percentages.
Payment	If you're collecting payment from the customer at the time of closing the appointment, click the Payment label to open a window to define the payment. Select the payment type, enter additional details, such as the check number, and the payment amount. Multiple payment types can be entered.
Total	Displays the amount owed by the customer after the gift cards, discounts and payments are entered.

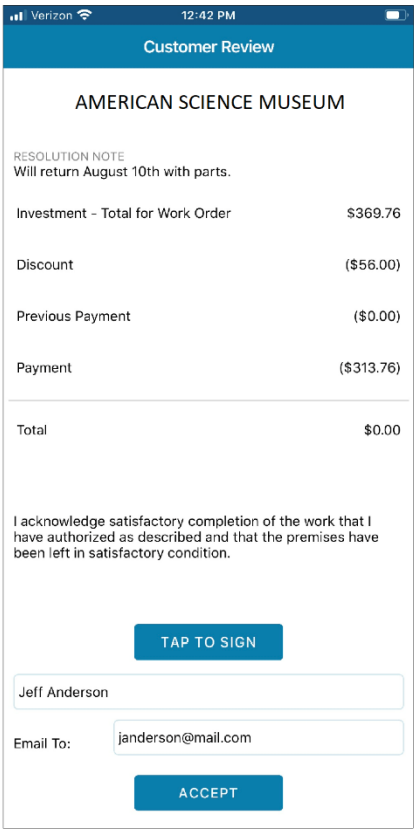
9. Expand the **Signatures** section if your organization requires a signature.



Click **Tech Signature** to sign your name in the Signature box.

If the customer is not present and you're ready to compete the appointment, mark the **Customer Not Present** box.

If the customer is present, click **Customer Review** to open the Customer Review window.



The customer can review the charges, enter an email address, and sign the agreement. Once the customer has signed, they can click Accept or you can do so. Another window will appear with a thank you message which will prevent the customer from viewing internal information.

To close the Thank You screen, click and hold on the screen for a few seconds. The screen will return to the Checkout workspace.

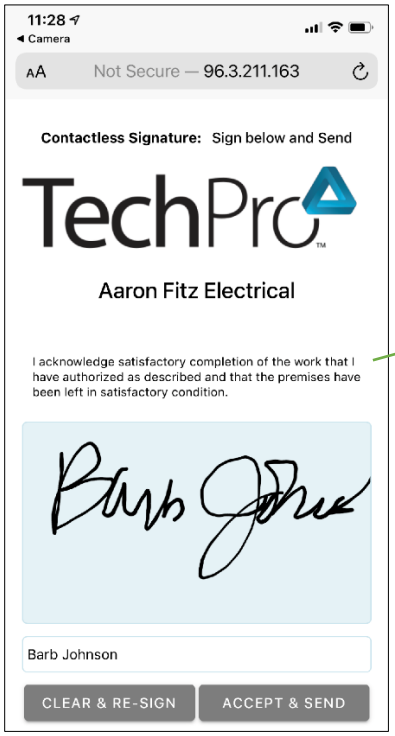
Click **Contactless Signature** to open the Contactless Signature page. Contactless signatures provide a safe way to receive a signature from customers without having to touch a tablet or smartphone. A contactless signature is completed one of two ways: by providing a QR code for a signer to scan or by sending a link to a signer.

Once the contactless signature is accepted and sent, the signature is applied to the customer signature field of the Checkout page.

Contactless signature options in the Checkout page in App Settings specify how to handle signatures received after the technician completes a checkout. They can be managed individually, or you can automatically attach an updated work order report to the work order in the back office.

By QR Code:

a. Show the QR code to a signer so the signer can scan the code.
b. Once the code is scanned the Website QR Code notification appears on the device. Click the notification to open a webpage where the signature can be entered.



This text is entered in the Disclaimer field on the Checkout tab in App Settings.

c. The signer signs the form and types their name in, then clicks **Accept & Send** to send the signature. A message appears saying the signature was received.

d. If the user is still on the Checkout page, the signature populates the Customer Signature box and their typed name. If the signature doesn't populate automatically or if they are on another page, click **Apply Signature**.

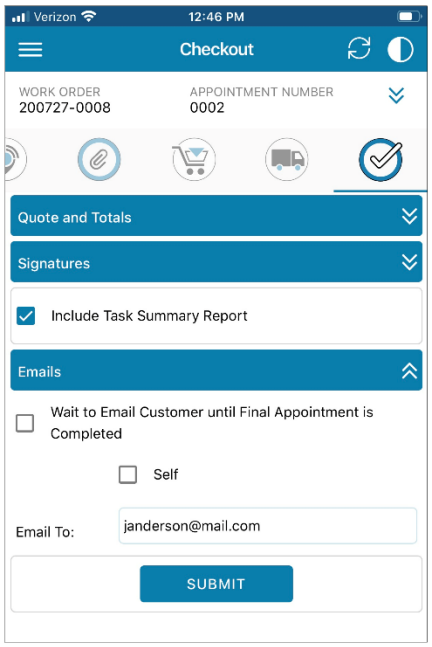
e. Continue processing the checkout as you normally do.

By a Link:

a. Enter a phone number and/or email address to whom you want to send the contactless signature link.
b. Click Send.
c. A text and/or email with a link to the contactless signature webpage is sent to the signer. Click the text or email to open a webpage where the signature can be entered.
d. The signer opens the link and types their name in, then clicks Accept & Send to send the signature. A message appears saying the signature was received.
e. If the user is still on the Checkout page, the signature populates the Customer Signature box and their typed name. If the signature doesn't populate automatically or if they are on another page, click **Apply Signature**.

f. Continue processing the checkout as you normally do.

10. Expand the **Emails** section.



Select the **Wait to Email Customer until Final Appointment is Completed** option if you want to email the customer after the final appointment on the work order is complete rather than as each appointment is completed. If you want to send the Work Order Summary report to the customer and/or the administrators at the back office, enter the email addresses for the recipients of the report. You can also send one to yourself for reference. This report is also sent as an attachment on the service call. This report is not available for job appointments.

11. Select the **Include Task Summary Report** option to include that report if there were tasks completed on the call. When marked, a Task Summary Report is emailed to the same recipients as the work order summary and form reports.

    If forms are completed as part of this work order, the default report for each form will be sent in the email.

    There may be form reports that are set up so to be withheld from the email to a customer. For example, internal Good Work forms or expense claims that the customer doesn't need at this stage. Be sure to include yourself in the email at checkout so that you receive a copy of all submitted form reports.

12. If you're satisfied with everything on the appointment and the Checkout workspace, click **Submit**. This results in the following:

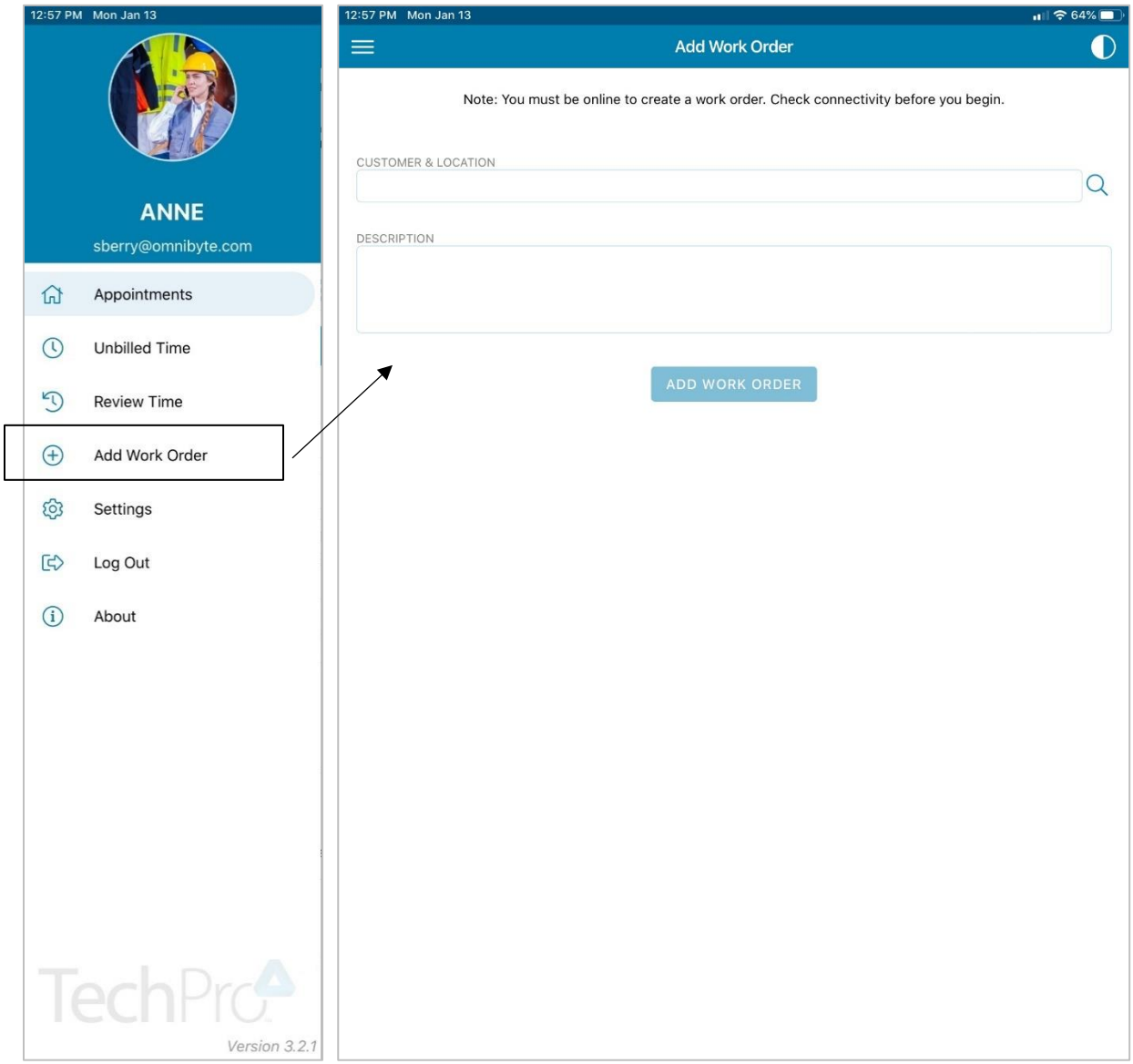
    - The information from the appointment syncs and sends information from the appointment to the back office.
    - The email for the report is sent to the recipients entered in step 9.
    - The form reports (if any) are included in the email and attached to the work order in the back office.
    - The appointment status changes to Complete.

    If all information was sent, you'll receive a message that the submission was successful. If your device happens to be offline when you click Submit, you should not enter any additional information for this appointment. Once you have a connection, you may need to sync again for the information to be submitted.

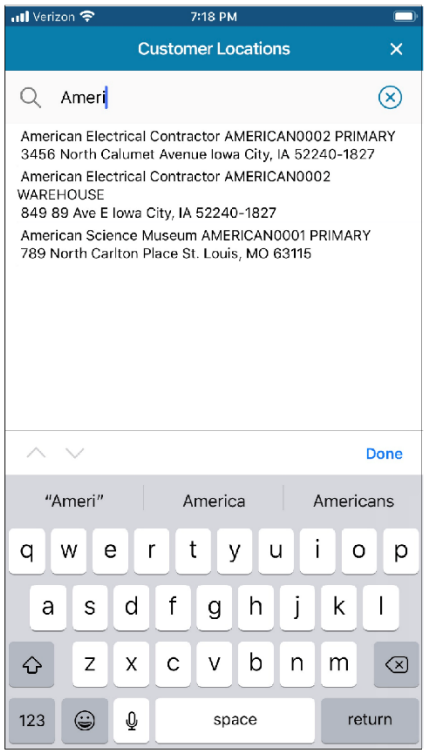
If the **Allow Parts and Time Entry on Completed Appointments** toggle is on (General tab in App Settings), additional time and parts can be entered for a completed appointment and will appear in the Past Appointments section of the Appointments home page until the work order is closed in the back-office application. After entering time or parts on a completed appointment, you'll need to use the Checkout workspace to submit the information. You'll be able to see only the resolution note and signatures for completed appointments.

Add Calls from the TechPro Mobile App

If your organization allows you to add calls from the mobile app, you'll have an Add Work Order option in the Menu:



1. Click the Customer & Location lookup to find all the customer records in your back-office system. The lookup may take time to load, depending on the connection available and the number of customer records in the back-office system. We recommend using the search to find the right customer and location record more quickly.

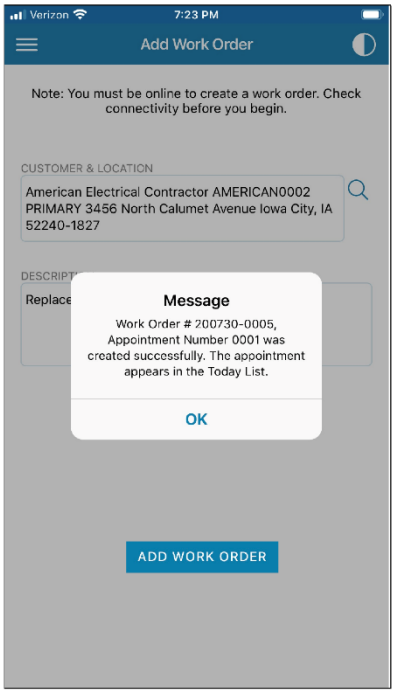


2. Enter a description of the work you're entering the call for.
3. Click **Add Work Order** and information about the work order created appears for reference.

   Depending on the way your service call system is set up, an additional window may be displayed for entering a number. Your company may have an internal policy for manual numbering so that numbers aren't duplicated.

   When you create a call using the Add Work Order option, the Date1 field of the SV00300 table is updated. In addition, the date from your device, at the time the call was created, updates the Date Opened field in Signature's Time Stamp window and the Call Opened Date in Signature's Service Level Call Inquiry window. This information is helpful for reporting and tracking the time between opening a call and completing the work.

   The call will appear in your Appointments list and you can begin work on the call as needed.

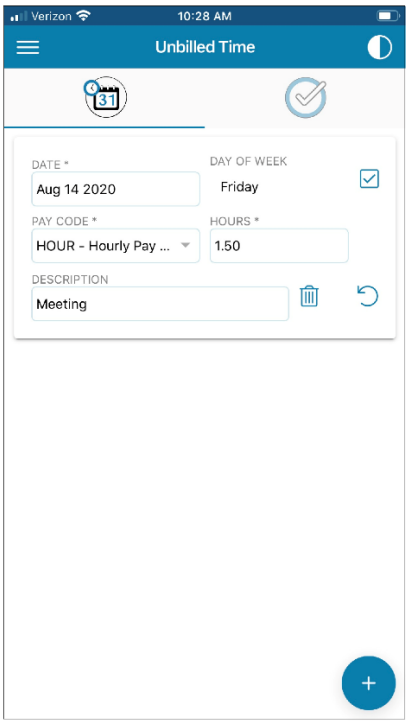


If an error occurs during this process, be sure to let your administrator know.

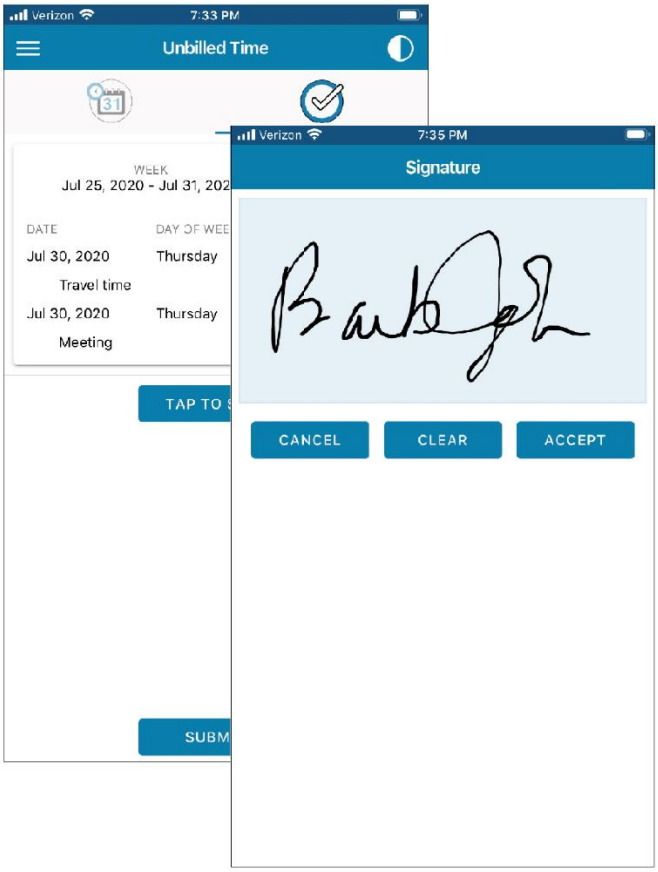
Unbilled Time

If you have time to track that is unbilled for any appointment, such as meetings, training, or time off, you can use the Unbilled Time workspace to enter that time using your device. Time can be entered only for the current pay period.

1. From the menu on the left, select **Unbilled Time** to open the Unbilled Time workspace.



2. Enter the date, time, and the number of hours. You can enter multiple lines for each different type of unbilled time. Hours can be entered to the nearest quarter hour.
3. Select the appropriate pay code for the time.
4. Enter a description of the unbilled time.
5. Once you've entered all of your unbilled time for the pay period, click the **Check Out** icon at the top of the screen. This will open another workspace where you can review all the time entered in the previous screen and click **Tap to Sign** to sign the timesheet, if required.



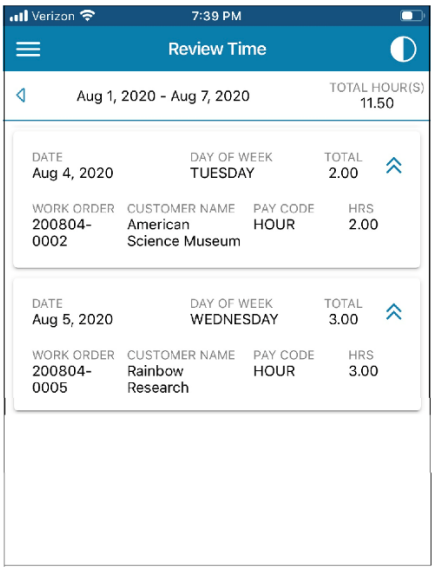
6. Click **Submit**.

If all information was sent, you'll receive a message that the submission was successful. Your information will be sent to the back office and will update your time there. An email with your time will be sent to your supervisor so they know to approve the time, and to your inbox for your information.

Review Time

All the time entered for the week, on appointments you've completed and submitted, as well as unbilled time, can be viewed on your device as a reference. Only information that has been submitted appears – time entered on appointments in progress that have not been submitted do not appear here.

From the menu on the left, click **Review Time** to open the Review Time workspace.



If you see information that needs to be corrected, you will not be able to edit it using TechPro. You will need to use your company's procedures for editing any committed time.

Reports

Task Summary Report

The Task Summary Report displays the tasks on a call and indicates which tasks have been completed. This report can be optionally sent with the Work Order Summary to anyone receiving the email at checkout. To include the report, mark the Include Task Summary Report box on the Checkout workspace.

TechPro

Task Summary Report

Work Order	200804-0008
Technician	BARB
Call Description	

Customer Name	American Science Museum
Work Location	PRIMARY
Address	789 North Carlton Place St. Louis, MO 63115 3145550106

Resolution Note

Job complete.

Equipment ID:	Description:	Equipment Type:
Manufacturer:	Model #:	Serial #:

COMPLETE	TASK CODES	TASK DESCIPTIONS	DATE
YES	**OBT_200**	**Furnace fall tune-up**	**08/04/2020**

Date of tune-up

YES	**OBT_200.1**	**Check air filter**
YES	**OBT_200.2**	**Check thermostat**
YES	**OBT_200.3**	**Clean/adjust automatic controls**
YES	**OBT_200.4**	**Check blower assembly**
YES	**OBT_200.5**	**Check fan cycle**
YES	**OBT_200.6**	**Check flue operation**
YES	**OBT_200.7**	**Lubricate as needed**

In addition, there are 3 different general summary reports that can be emailed to the customer and/or your office staff and are attached to the service call as part of the checkout process:

- **Time and Materials Work Order Summary Report**: This report is printed when the Use TechPro Quotes for Flat Billing option is turned *off* and it is not an MC/MCC call.
- **Maintenance Summary Report**: This report is printed when it is an MC/MCC call.
- **Call Summary Report**: This report is printed when the Use TechPro Quotes for Flat Billing option is turned *on* and it is an MC/MCC call.

Time and Materials Work Order Summary Report

The following illustration displays a Time and Materials Work Order Summary Report.

TechPro

Work Order Summary Report

Ticket Number
200624-0006

Appointment Date
6/24/2020

Customer ID
AARONFIT0001

Address
One Microsoft Way
Redmond, WA 98052-6399

Appointment Number
0001

Work Location
PRIMARY

Technician
BARB

Customer Name
Aaron Fitz Electrical

Customer Phone
4255550101

Customer PO

Resolution Note

Job complete.

Hours

Date	Hours	Description
06/24/2020	1.25	8:10 AM - 9:25 AM

Materials Used

ID	Description	Qty
0-20X16X1 FILTER	20"X16"X1" Furnace Filter	2.00000
5-STDLABOR	Standard service labor	2.00000

Purchase Order

Date	PO Number

Thank you for your business!

6/24/2020 9:50:13 AM

Call Summary Report

The following illustration displays a Call Summary Report.

TechPro

Ticket Number
200804-0008

Appointment Date
8/4/2020

Customer ID
AMERICAN0001

Address
789 North Carlton Place
St. Louis, MO 63115

Work Order Summary Report

Appointment Number
0001

Work Location
PRIMARY

Technician
BARB

Customer Name
American Science Museum

Customer Phone
3145550106

Customer PO

Resolution Note

	Billing Totals
Quote Total	$300.00
Subtotal	$300.00
Previous Payment	($0.00)
Cash	($300.00)
Balance Due	$0.00

Thank you for your business!

Maintenance Summary Report

The following illustration displays a Maintenance Summary Report.

TechPro

Ticket Number
181003-0004

Appointment Date
10/3/2018

Customer ID
202

Address
789 North Carlton Place
St. Louis, MO 63115

Maintenance Summary Report

Appointment Number
0001

Work Location
PRIMARY

Technician
ALICE

Customer Name
American Science Museum

Customer Phone
3145550106

Customer PO

Resolution Note

Hours

Date	Hours	Description
10/03/2018	1.5	mc call this time

Materials Used

ID	Description	Qty
470DST	KITCHEN FAUCET - DELTA CHROME	1.00000