

Optpsy Mobile Software

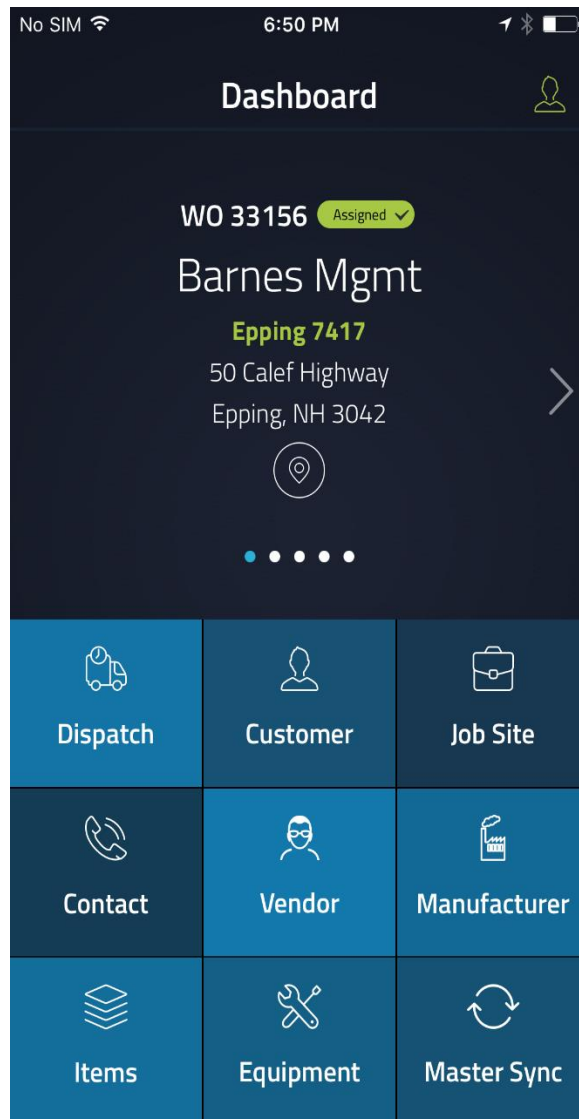


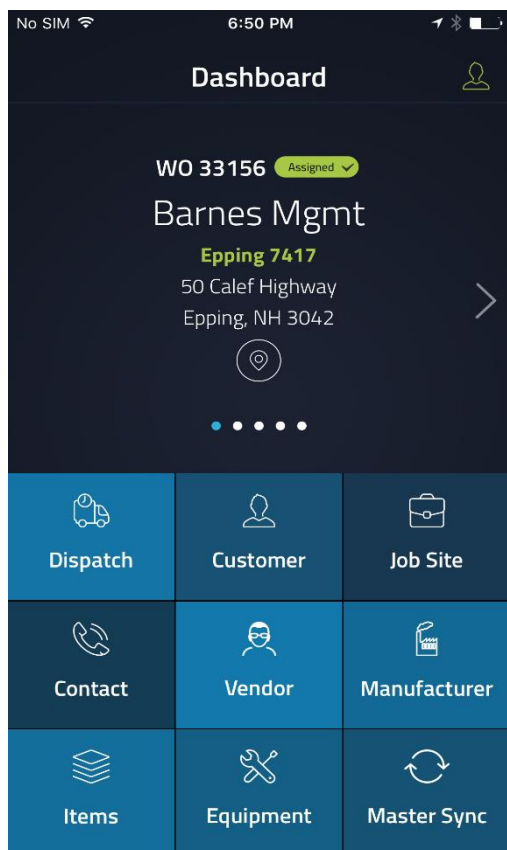
Table of Contents

General Overview / Sequence of Operation	5
How Data is Retrieved and Saved in Opsy	5
Main Opsy Screen:	7
“Dispatch Board” Screen	8
“Work Order Detail” Screen	9
“Slot Details” Screen (expanded / top of screen)	10
“Slot Details” Screen (expanded / bottom of screen)	11
“Labor Details” Screen (expanded / top of screen)	12
“Labor Details” Screen (expanded / bottom of screen)	13
“Material Details” Screen (expanded)	14
“Item Lookup” Screen Detail from Material Details Screen	15
“Item Lookup” Screen Detail (“Item Name” Expanded) from Material Details Screen	16
“Item Lookup” Screen Detail (Category Filter Expanded) from Material Details Screen	17
Adding a Part to a Call	18
“Attachments” Screen (expanded)	19
Adding an Attachment	20
Attaching a File (cont 2)	21
Emailing Work Order to Customer	25
Emailing Work Order to Customer (cont 2)	26
Emailing Work Order to Customer (cont 3)	27
Scheduling a Follow-up Call (cont 2)	29
Scheduling a Follow-up Call (cont 3)	30
Adding a New Call from the Mobile Device	31
Adding a New Call from the Mobile Device (cont 2)	32
Adding a New Call from the Mobile Device (cont 3)	33
Adding a New Call from the Mobile Device (cont 4)	34
Adding an Additional Slot to a Work Order	35
Adding an Additional Slot to a Work Order (cont 3)	37
Appendix A	38
Filter “Techs” (Technicians) Screen	38
Appendix B	39
Filter “Status” Screen	39
Appendix C	40

Billing Customer Detail from “Work Order Detail” Screen	40
<i>Appendix D</i>	41
Job Site Detail from “Work Order Detail” Screen	41
<i>Appendix E</i>	42
Slot Detail “Status” Expanded Screen	42
<i>Appendix F</i>	43
Slot Detail “Status” Expanded Screen	43
<i>Appendix G</i>	44
“Follow Up Labor Code” Expanded Screen	44
<i>Addition’s to Mobile App Details Screen</i>	45

General Overview / Sequence of Operation

How Data is Retrieved and Saved in Opsy



- Select **Master Sync** to retrieve your calls from the server.

Notes:

The Opsy app will save the following data on your device as it is added to the form:

- Materials
- Signatures
- Attachments


Any other data added, such as status and notes, are not saved until you hit the Opsy button and click save.

VERY IMPORTANT - Make sure that you save your data before your device sleeps or turns off. (Screen time-out is user configured. We recommend setting the screen time-out on your device to 2 minutes.) **Any data not saved before the device sleeps or turns off will be lost.**

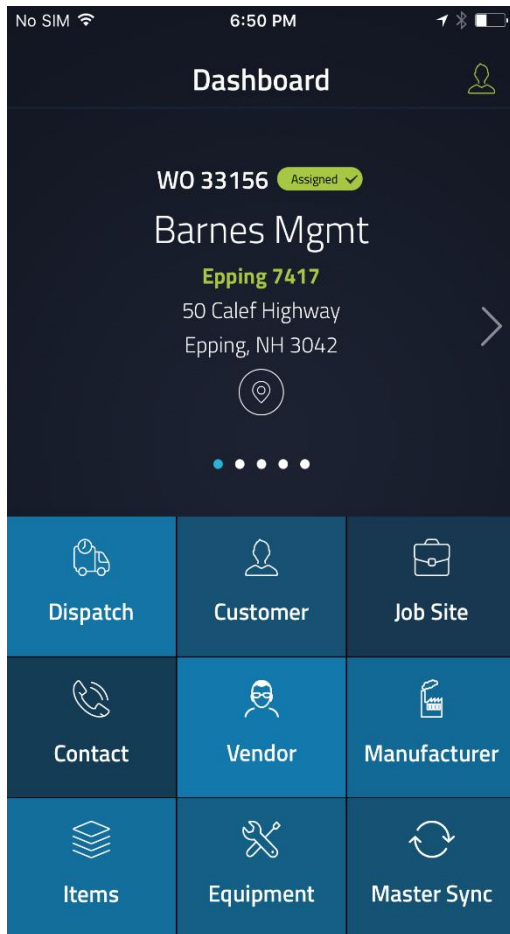
Make sure to save your data after going in progress.

If you are not actively inputting data into a call, hit the back button to return to the dispatch board.

Below is a suggested call sequence that will help prevent lost data:

1. At time of departure, open call and put call into progress.
2. Hit the  button to update the status
3. Perform work at customer site
4. Open call and update slot notes, add materials if used, and get customer signature.
5. If at any time you need to put down your device for any reason while you are adding notes or updating the call status, hit the back button to save your work.
6. If you can't find someone to sign for the call within a minute or so, hit the back button and reopen the call when you have them with you.

Main Optsy Screen:




- Select “**Dispatch**” to enter the Dispatch Board for processing work orders (service calls)
- Toggle thru Work Order QuickView on top of Main Screen to see all work orders of the day.


Notes:

“Dispatch Board” Screen




Select “” to filter which technicians to view on “your” Dispatch Board.

See **Appendix A** for detail.

Select “” to filter which work order status to view on “your” Dispatch Board.

See **Appendix B** for detail.

Notes:

The Dispatch Board displays the current date along with all of the work orders assigned to the logged in service technician (by default). These defaults can be modified or filtered by pressing the  button.

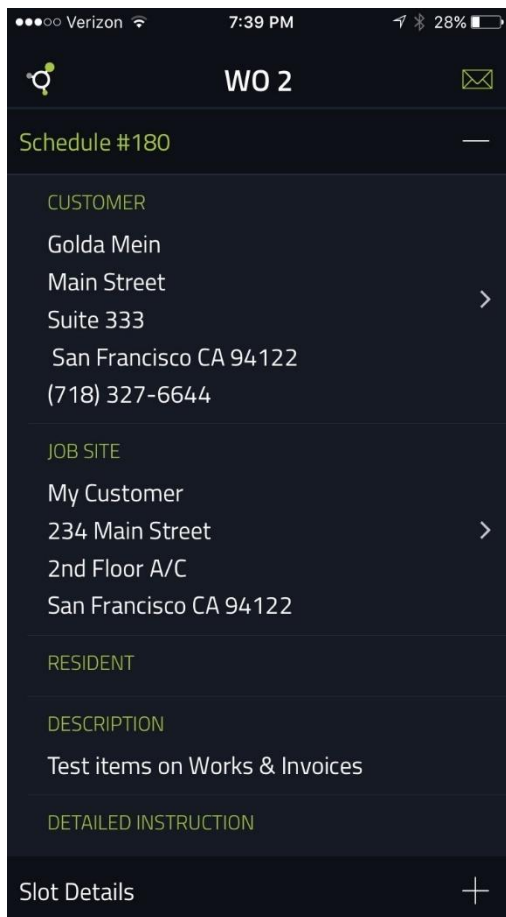
Displayed date can be changed by clicking on the calendar button. Clicking on the date will give you a navigation box allowing you to pick a specific date.

If multiple work orders are assigned they will be displayed on this screen.

Selecting a displayed work order by pressing on the + will allow you to view the WO details.

Every service call is assigned a work order number, WO, and a slot number, Slot. A Slot is the time assigned for a work order. A Work Order can have a single or multiple slots.

“Work Order Detail” Screen



The Schedule # and Work Order # are used interchangeably within the Optsy mobile application.

Select CUSTOMER to expand the Customer section for more detail.

See Appendix C for detail.

Select JOB SITE to expand the Job Site section for more detail.

See Appendix D for detail.

The description is the **work to be performed** by the service technician for the selected work order. The source of this data is entered by Dispatch on the Work Order Detail screen; specifically, the Call Description field.

Notes:

In order to process or modify a service call, you have to expand (select) Slot Details to change the status.

By expanding (selecting) Labor or Materials, the Optsy mobile application allows you to add/edit/delete items related to Labor or Materials for the selected Work Order.

“Slot Details” Screen (expanded / top of screen)

The screenshot shows a mobile application interface for a work order. At the top, the status bar indicates Verizon service, 7:49 PM, and 28% battery. The app header shows a magnifying glass icon, 'WO 2', and an envelope icon. Below this is a 'Slot Details' section with a horizontal line separator. The details are organized into sections: STATUS (Assigned with a dropdown arrow), SUB STATUS (- Select One - with a dropdown arrow), START TIME (Mar 11, 2016 10:00 AM with a calendar icon), END TIME (Mar 11, 2016 11:00 AM with a calendar icon), TECH LIST (Rockets, Johnny, Admin with a right arrow), PRIORITY (- Select One - with a dropdown arrow), and CUSTOMER EQUIPMENT (empty field).

- Select the appropriate STATUS for the selected Work Order.

See Appendix E for detail

- Customer equipment is a display field. If the back office has information on the equipment to be serviced on file, the equipment description will display here.

Notes:

“Slot Details” Screen (expanded / bottom of screen)

Verizon 7:57 PM 28%

WO 2

Slot Details

PRIORITY
- Select One -

CUSTOMER EQUIPMENT

TOTAL TRAVEL TIME
0:0

TOTAL TRAVEL DISTANCE

SLOT MESSAGE

TECH NOTE

Enter your actual one-way travel time to customer site.

Enter your one-way actual mileage to the customer site

Enter what you did on the call into the slot message. Data entered in this field will be included when the service call is emailed.

You can copy and paste into or from the Labor Description field.

Enter Tech (Technician) Note(s) if appropriate for the selected Work Order.

Notes:

By expanding (selecting) Labor or Materials, the Opsy mobile application allows you to add/edit/delete items related to Labor or Materials for the selected Work Order.

“Labor Details” Screen (expanded / top of screen)

Verizon 8:01 PM 28%

WO 2

Labor

LABOR CODE

- Select One -

INVOICE DESCRIPTION

LABOR DESCRIPTION

FOLLOW UP REQUIRED

FOLLOW UP LABOR CODE

- Select One -

FOLLOW UP MESSAGE

Verify the correct Labor Code for the selected Work Order.

See Appendix F for detail.

Leave the invoice description blank. Operations will copy your notes from the labor description field into this field.

Enter a description of the work performed at the customer site. This description should be detailed enough so that the customer can easily tell what work was completed. Call details should include such items as **documenting your actual time on site or referencing another tech's paperwork (if you are not the lead tech)**.

You can copy and paste into or from the Slot Message field.

This description will appear on the customer's invoice.

Notes:

“Labor Details” Screen (expanded / bottom of screen)

- Indicate if any Follow Up is Required for the selected Work Order.

- If Follow Up is Required, select the appropriate FOLLOW UP LABOR CODE.

See Appendix G for detail.



- If Follow Up is Required, enter a FOLLOW UP MESSAGE. This FOLLOW UP MESSAGE becomes the “Slot Message” for the New Slot

- Check this box if call is complete and no additional follow-up is necessary.

Notes:

“Material Details” Screen (expanded)

Verizon 8:04 PM 27%

 **WO 2** 

Schedule #180 +

Slot Details +

Labor +

Materials —

Total Sale Amount: \$0.00

Remove **Add**

Attachments +

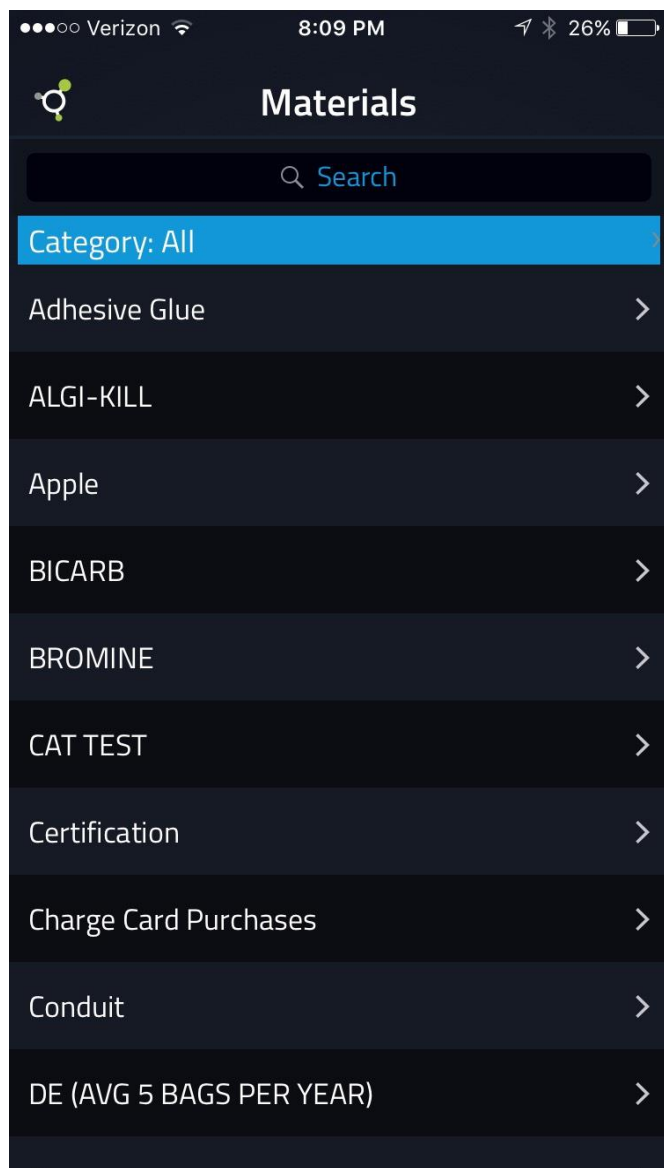
Signature +

Problems +

- If a Material or Part was used for the selected Work Order, select ADD.

Notes:

“Item Lookup” Screen Detail from Material Details Screen



Select Item Name (Part Number) or Sales Description (Part Description) to lookup the item if the Material/Item Number/Name is not known.

For additional search assistance, filter by Category to lookup the item if the Material/Item Number/Name is not known.

Notes:

You can lookup part numbers two ways:

1. Enter the number or description in the keyword block. Select Item Name or Sales Description from the drop down box and press the search button.
2. You can also scroll to find your part number.

Adding a Part to a Call

Verizon

8:14 PM

25%

X

Material

✓

Please provide material details:

Part Number

Adhesive Glue

Invoice Description

Adhesive Glue

Quantity

−

1

+

Unit of Measure

Liter

⌵

Warehouse


Main

⌵

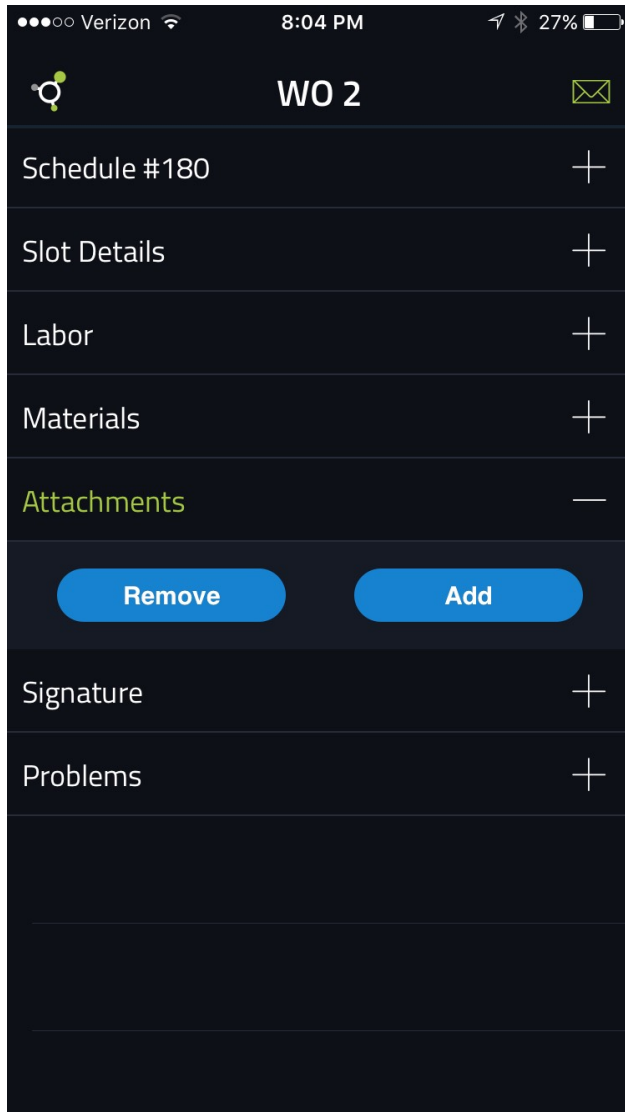
Technician

- Select -

⌵

- Select quantity and choose  to add parts to your work order.

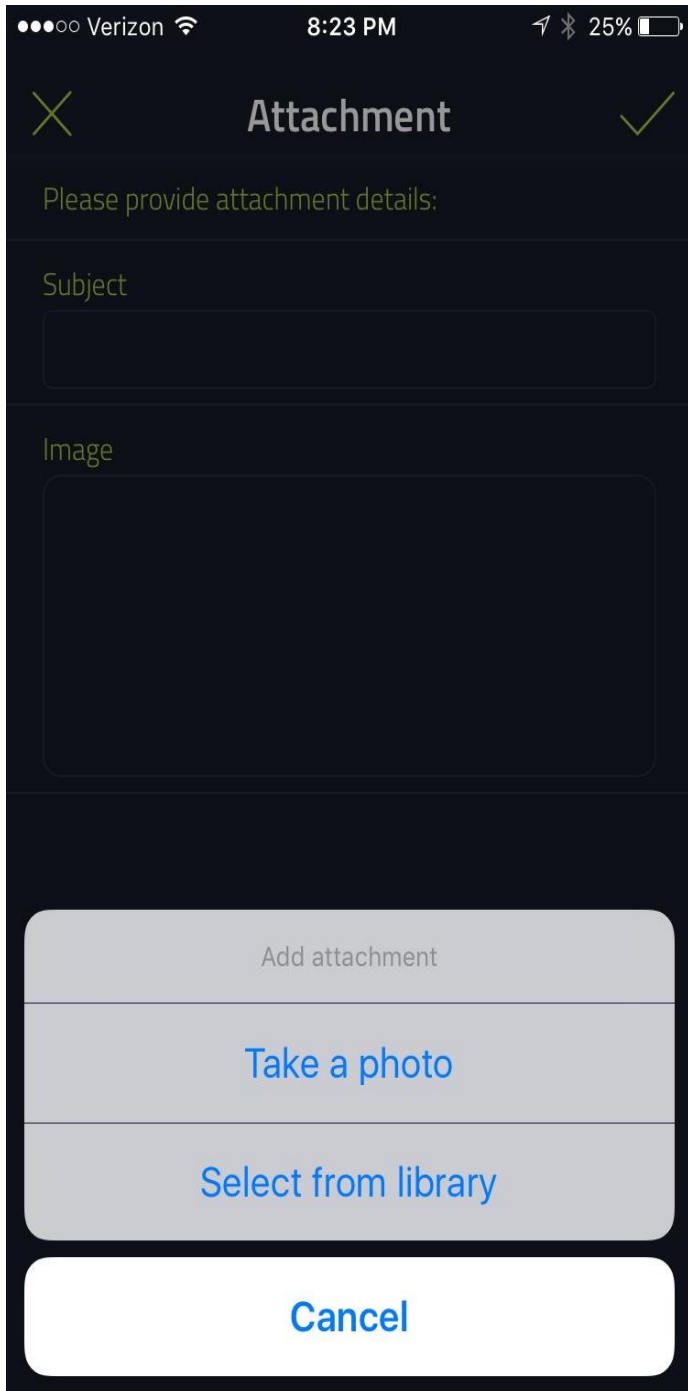
“Attachments” Screen (expanded)



- Click the add button to attach pictures and or documents to a service call.

Notes:

Adding an Attachment



Verizon 8:23 PM 25%

Attachment

Please provide attachment details:

Subject

Image

Add attachment

Take a photo

Select from library

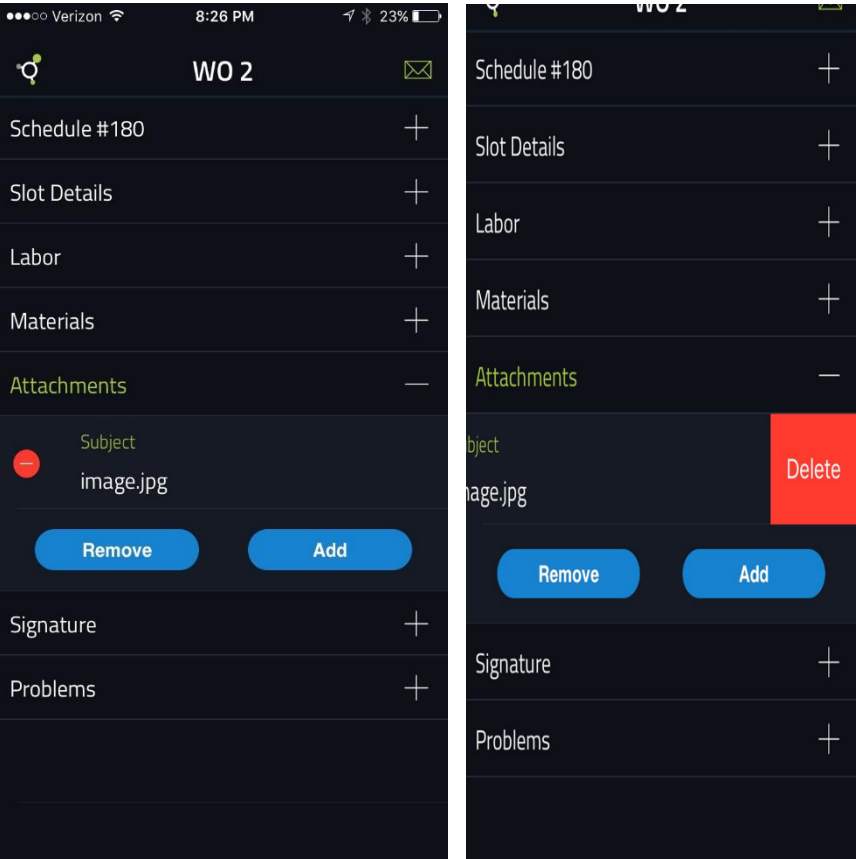
Cancel

Choose how you want to attach the file.

1. Capture from your phone's camera
2. Choose file from gallery

Notes:

Removing an Attached File



- Touch the red circle next to the file name so that it is checked.
- Press the red Delete to remove

Notes:

“Signature (Electronic) Details” Screen

Verizon 8:04 PM 27%

WO 2

- Slot Details
- Labor
- Materials
- Attachments
- Signature
- Problems

SIGNATURE TERMS
Schedule Signature Terms for Signature

SIGNATURE
[Text Input Field]

NAME
[Text Input Field]

Customer signs mobile device

Type signature name. You are required to complete this field.

Notes:

Emailing Work Order to Customer

Slot Details

PRIORITY

- Select One -

CUSTOMER EQUIPMENT

TOTAL TRAVEL TIME

0:0

TOTAL TRAVEL DISTANCE

-

+

SLOT MESSAGE

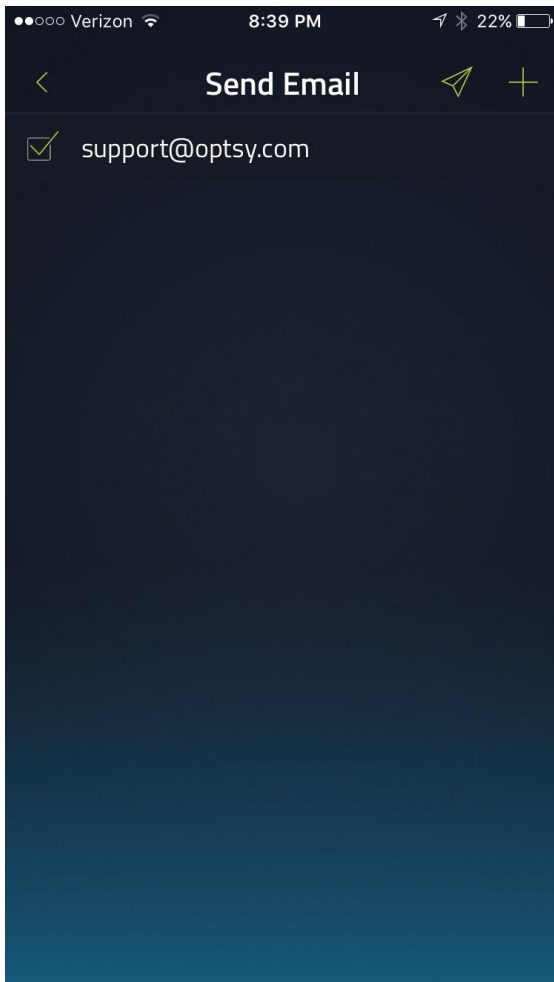
TECH NOTE

You can send a copy of your work order via email by pressing the Mail icon button at the top right of your mobile device. Pressing this button brings up a menu with the option to “Send to emails”.

Touch **Send to emails**

Notes:

Emailing Work Order to Customer (cont 2)




- Press the + and type in the customer's email address and press add. The email address will be added with a green check box next to it. If you need to remove or change the address, touch the check and it will uncheck the email.

- Press the flying paper to send the email.

Notes:

Emailing Work Order to Customer (cont 3)

**Brady Systems**
811 North Alvord Street
Syracuse, NY 13208
Phone: (315) 422-9271 - Fax: (315) 472-5400

Work Order
3315


Bill To:
Cust ID: 32
Name: Wegmans Food Markets, Inc.
Company: Wegmans Food Markets, Inc.
Address: PO Box 30844
Rochester, NY 14603

Job Site:
Site ID: 1497
Site Name: Wegmans #67 Irondequoit - Zbn
Address: 525 Titus Ave
Rochester, NY 14617

Schedule Details:
Schedule ID: 4402
Start Time: 4/17/2013 9:45:00 AM
End Time: 4/17/2013 11:00:00 AM
Scope of Work: 4654821-6A3-64506
Graham

Items:

Qty	Unit	Description	Unit Amt	Tax Amt	Total
1	Each	Plastic Spider Mount	\$23.00	\$0.00	\$23.00
1	Each	Printer Door Uc-C	\$11.00	\$0.00	\$11.00

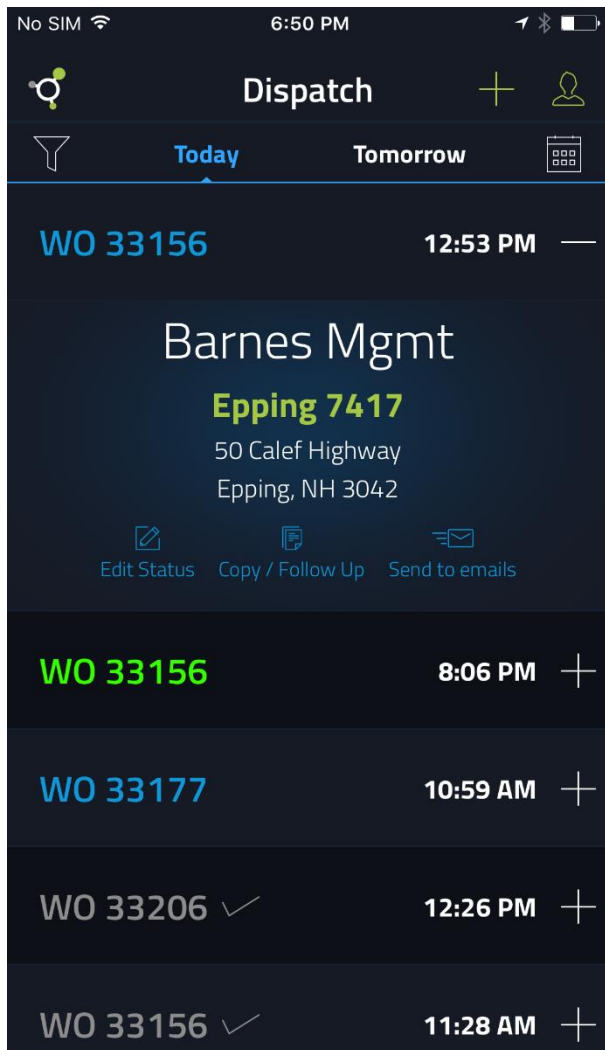


Customer Signature
Page 1 of 1

This is an example of what the customer receives when a work order is emailed from the mobile device. Note that "Scope of Work" pulls from the Slot Note description.

If parts are entered on the work order, they will appear with pricing. Labor does not appear on the work order sent from the mobile device.

Scheduling a Follow-up Call from Mobile Device







- To schedule a follow-up call from your device:
1. Complete your call and sync with the server. Make sure to mark the call for follow up with a follow up note.
 2. Press the Follow up button in middle of detail to bring up the follow up page.

Notes:

You must complete the original call and sync it to the server **BEFORE** scheduling the follow up. If the follow up call is schedule before the original call is scheduled, the system does not see it as a follow up and will not clear it off the follow up schedule board in the back office.

Scheduling a Follow-up Call (cont 2)

WO#	
2	
Summary	
Test items on Works & Invoices	
Slot Time	
Same time as source sched	▼
Status	
Assigned	▼
Sub Status	
- Select -	▼
Start Time	
Mar 11, 2016 10:00 AM	
End Time	
Mar 11, 2016 11:00 AM	

Mar 11, 2016 10:00 AM	
End Time	
Mar 11, 2016 11:00 AM	
Tech(s)	
Rockets, Johnny, Admin	▼
Split Schedule	<input type="checkbox"/>
Follow Up	<input type="checkbox"/>
Note	<div></div>
Tech Note	<div></div>

- Select Slot Time. See Appendix H detail descriptions

- Change Status to Assigned

- Assign tech if a different tech will complete the follow up. See Appendix A

- Split is not used at this time.

- Type in description of work to be performed at follow up

Notes:

Scheduling a Follow-up Call (cont 3)

The screenshot shows a mobile application interface for scheduling a follow-up call. The status bar at the top indicates Verizon service, 8:52 PM, and 22% battery. The app title is "Follow Up". The form includes the following fields and controls:

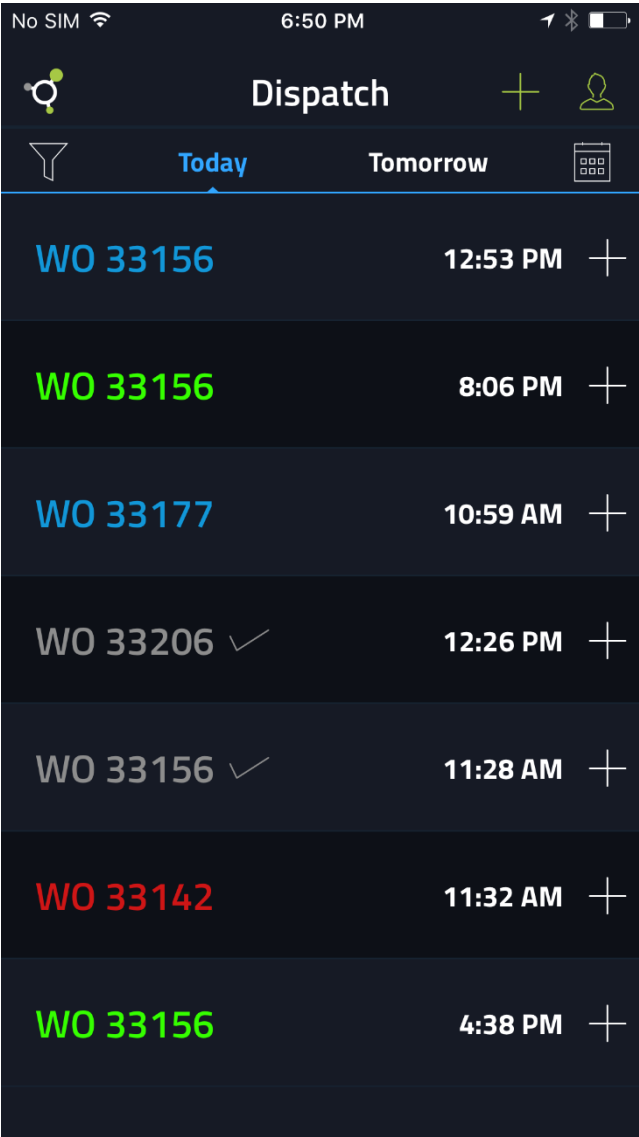
- Start Time:** Mar 11, 2016 10:00 AM (with a calendar icon)
- End Time:** Mar 11, 2016 11:00 AM (with a calendar icon)
- Tech(s):** Rockets, Johnny, Admin (with a dropdown arrow)
- Split Schedule:** A toggle switch currently turned off.
- Follow Up:** A toggle switch currently turned off.
- Note:** A text input field.
- Tech Note:** A text input field.

A green checkmark icon is located in the top right corner of the app screen, indicating the option to save the schedule.

Press the check to save the follow up schedule.

Notes:

Adding a New Call from the Mobile Device



- From the dispatch board, press the + button for the option to add a new work order

Notes:

This feature can be used for adding a work order for after hours and weekend on call work.

Adding a New Call from the Mobile Device (cont 2)

The screenshot shows a mobile application interface for creating a new work order. At the top, the status bar displays 'Verizon', signal strength, time '9:02 PM', location services, Bluetooth, and a 20% battery level. The app header has a dark blue background with a yellow 'X' icon on the left, the title 'New Work Order' in white, and a yellow checkmark icon on the right. Below the header, there are five sections, each with a yellow title and a dark blue background. Each section contains a dropdown menu with the text '- Select -' and a yellow chevron icon. The sections are: 'Customer', 'Job Site', 'Resident', 'Equipment', and 'Agreement#'. Below the 'Agreement#' section is a text input field. Below that is a section titled 'Call Summary' with a larger text input field. At the bottom is a section titled 'Instructions' with a text input field.

Customer
- Select -

Job Site
- Select -

Resident
- Select -

Equipment
- Select -

Agreement#

Call Summary

Instructions

- Enter Customer Name

- Enter Job Site

- Enter Agreement Number, if applicable.

- Enter call description

- Type in any instructions

Notes:

Adding a New Call from the Mobile Device (cont 3)

Verizon 9:02 PM 20%

New Work Order

Customer PO

Is Project ☐

WO Type
- Select -

Problem Code
- Select -

Problem Desc.

Create Sched ☐

Tech(s)
- Select -

- Add customer PO, if given.
- Leave this box unchecked. Service calls for projects will be created by the back office.
- Choose the work order type. See Appendix I for details.

Notes:

The Problem Code and Problem Desc. Fields are optional at this time. You do not need to complete these fields.

Adding a New Call from the Mobile Device (cont 4)

- Select -

▼

Problem Desc.

Create Sched

Tech(s)

- Select -

▼

Start Time

End Time

Note

- Touch the check box to create the schedule.
- Enter the technician. See Appendix A for details.
- Enter the estimated start time and end time.
- Press check and save.

Notes:

Adding an Additional Slot to a Work Order



To add a slot to an existing work order, press + and click on New Schedule.

Notes:

This option allows you to add an additional schedule or slot to a work order.

Example:

You are called in to help out another Technician on a call. You would add a slot to your dispatch board to track your time.

The only time you should add a new schedule is for an after-hours or weekend call. Please contact dispatch during normal business hours.

Adding an Additional Slot to a Work Order (cont 2)

Verizon 9:21 PM 19%

New Schedule

WO#

Summary

Status
Assigned

Sub Status
- Select -

Start Time

End Time

Tech(s)
- Select -

- Type in the WO#.
- Select Status. See Appendix E for details.
- Enter estimated start date and time.
- Enter estimated end date and time.
- Select Tech. See Appendix A for details.

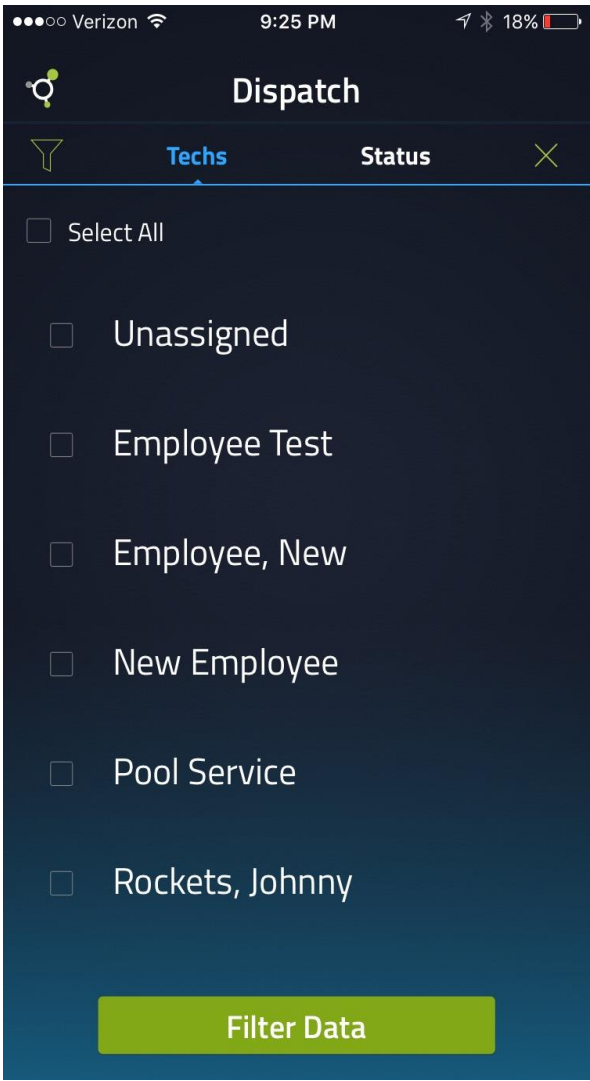
Notes:

You must know the work order number in order to add an additional schedule. You will not have the option to search for the work order number.

The Split check box is not used at this time. Please leave it unchecked.

Appendix A

Filter “Techs” (Technicians) Screen

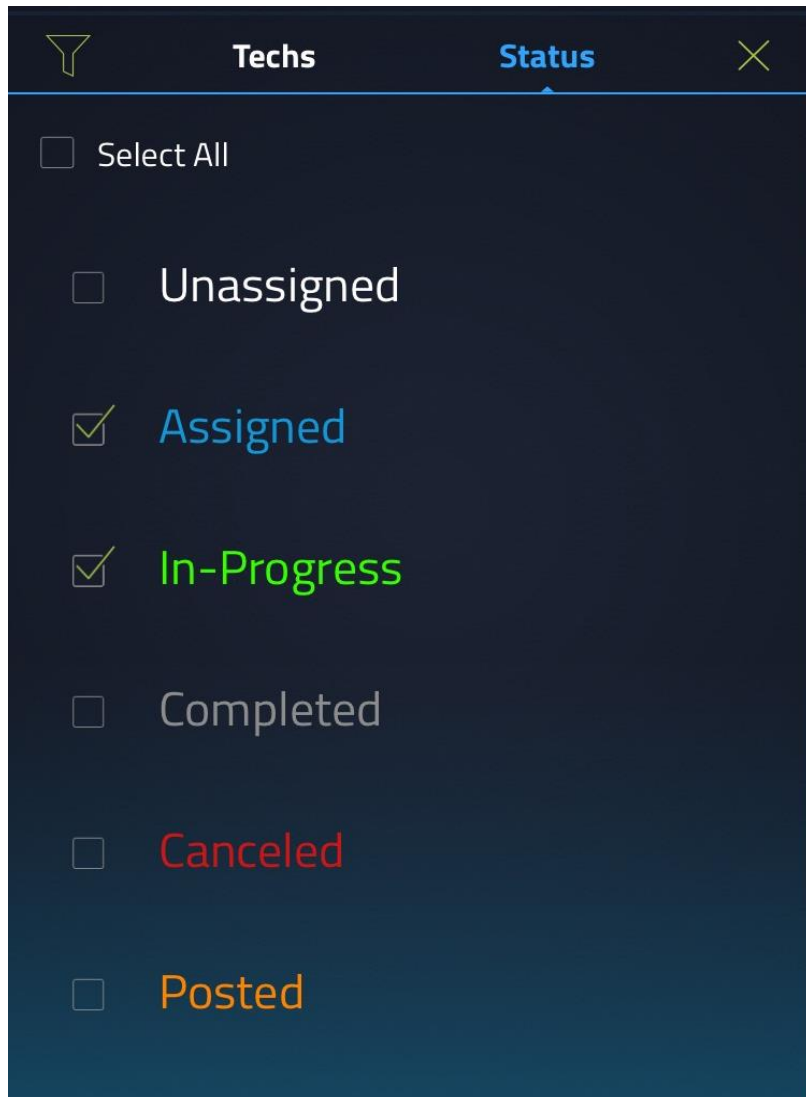


Notes:

Select the appropriate service technician (or company resource) to be displayed on the Dispatch Board.

Appendix B

Filter “Status” Screen



☐ Select All

☐ Unassigned

☒ Assigned

☒ In-Progress

☐ Completed

☐ Canceled

☐ Posted

Notes:

Select the appropriate status to be displayed on the Dispatch Board.

Unassigned = a work order that is not assigned to a specific service technician.

Assigned = a work order that is assigned to a specific service technician.

In-Progress = a work order that has been assigned and selected by a service technician.

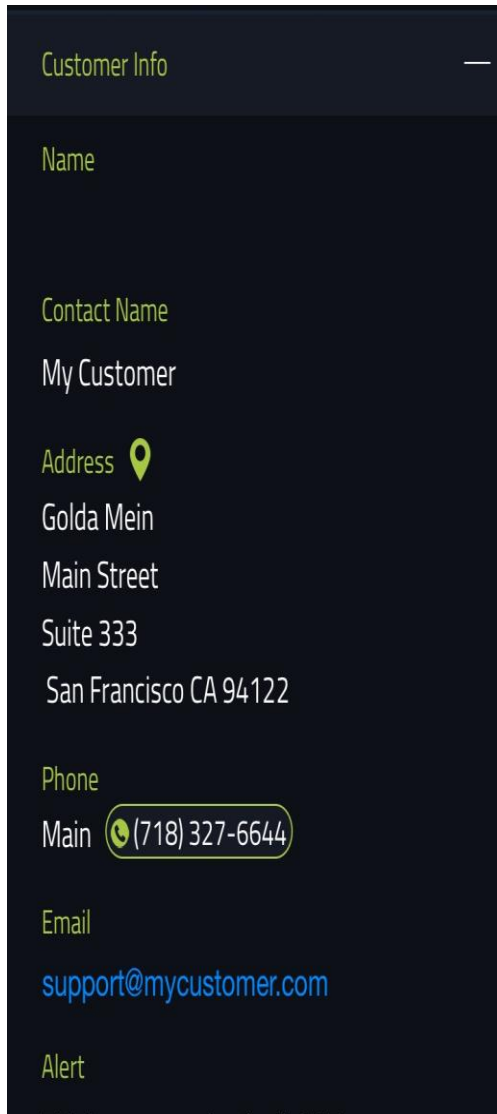
Completed = a work order slot that has all of the labor and material entered by the service technician and marked “completed”. No more time or parts will be added for that slot. The service call may still be open if it needed additional follow-up. The follow-up will be recorded on a different slot.

Canceled = a work order that has been canceled by the Customer or Brady System for various reasons.

Posted = a work order that has been invoiced and can no longer be modified

Appendix C

Billing Customer Detail from “Work Order Detail” Screen



The screenshot shows a dark-themed mobile application interface for 'Customer Info'. The fields are as follows:

- Name:** (empty)
- Contact Name:** My Customer
- Address:** Golda Mein, Main Street, Suite 333, San Francisco CA 94122
- Phone:** Main (718) 327-6644
- Email:** support@mycustomer.com
- Alert:** (empty)

- Select the address to display routing and/or a mapping application supported by your smart phone.

- Select the number to automatically dial the number displayed for the main phone number using the telephone number displayed.

- Select the Email to launch the email application supported by your smart phone using the email address displayed.

Notes:

Expanding the Customer Job Sites will show the job sites that are associated with the displayed Customer.

Expanding the Accounts Receivable will show the relevant AR data associated with the displayed Customer.

Appendix D

Job Site Detail from “Work Order Detail” Screen

Job Site Info

Address

My Customer

234 Main Street

2nd Floor A/C

San Francisco CA 94122

Phone

Main (718) 327-8866

Job Site Customers

Accounts Receivable

- Select the address to display routing and/or a mapping application supported by your smart phone.
- Select the number to automatically dial the number displayed for the main phone number using the telephone number displayed.

Notes:

Expanding the Accounts Receivable will show the relevant AR data associated with the displayed Customer.

Appendix E

Slot Detail “Status” Expanded Screen

Schedule #174

RESIDENT

DESCRIPTION

Test QB Mapping

DETAILED INSTRUCTION

Slot Details

STATUS

Assigned

Cancel - Select One - Done

Unassigned

Assigned

Notes:

Select the appropriate status to be displayed on the Dispatch Board.

Unassigned = un-assign the selected work order that is assigned for a specific service technician.

Assigned = assign the selected work order for a specific service technician.

In-Progress = indicates the selected work order is in process (currently being worked on)

Completed = a work order slot that has all of the labor and material entered by the service technician and marked “completed”. No more time or parts will be added for that slot. The service call may still be open if it needed additional follow-up. The follow-up will be recorded on a different slot.

Canceled = cancels the selected work order.

Appendix F

Slot Detail “Status” Expanded Screen

Schedule #174

Test QB Mapping

DETAILED INSTRUCTION

Slot Details

Labor

LABOR CODE

- Select One -

Cancel

- Select One -

Done

1 Man Hourly

Agreement

Notes:

Select the appropriate Labor Code for the selected Work Order.

Zone charges will be added to the work order at the time of billing

Appendix G

“Follow Up Labor Code” Expanded Screen

Schedule #174

Test QB Mapping

DETAILED INSTRUCTION

Slot Details

Labor

LABOR CODE

- Select One -

Cancel - Select One - Done

1 Man Hourly

Agreement

Notes:

Select the appropriate Follow Up Labor Code for the selected Work Order.

Zone charges will be added to the work orders.

Additions to the Mobile App Details



- Press the dispatch button on the top of the screen and all of the Work Order details will be shown. Press again and they will all be hidden from view.
- All Tech names that are on each job are listed below the number and customer details.