Optsy Mobile Software

Revision 2.0
March 2016

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General Overview / Sequence of Operation

How Data is Retrieved and Saved in Optsy
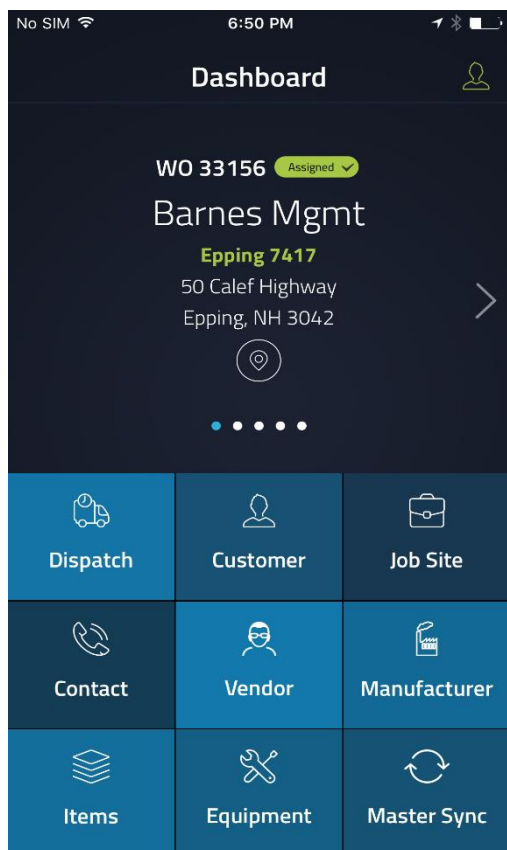
- Select **Master Sync** to retrieve your calls from the server.

Notes:

The Optsy 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 Optsy 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:
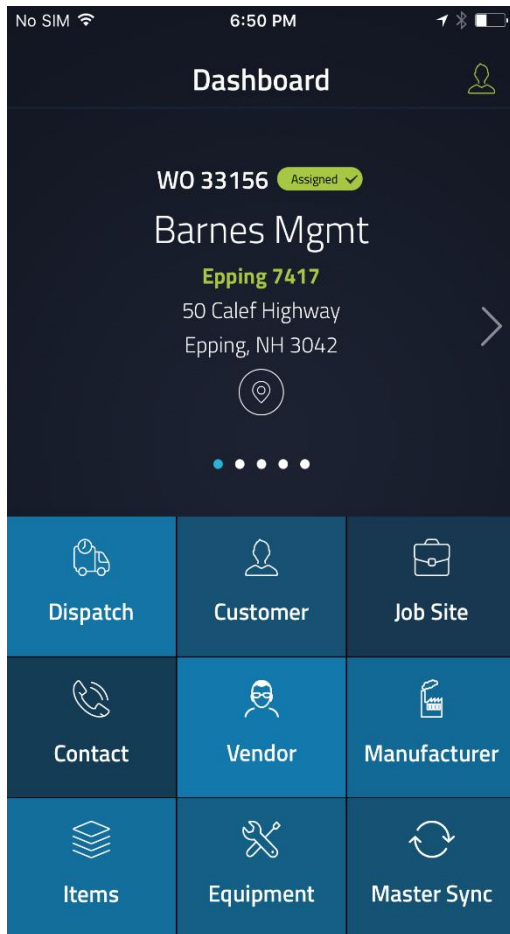
- Select "**Dispatch**" to enter the Dispatch Board for processing work orders (service calls)

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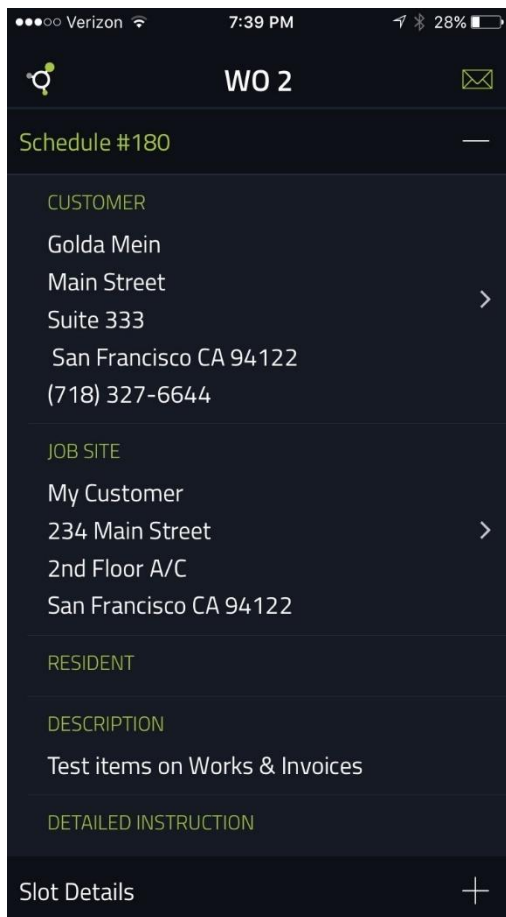
The Schedule # and Work Order # are used interchangeably within the Optsy mobile application.

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)

- 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)

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 Optsy 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)

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.
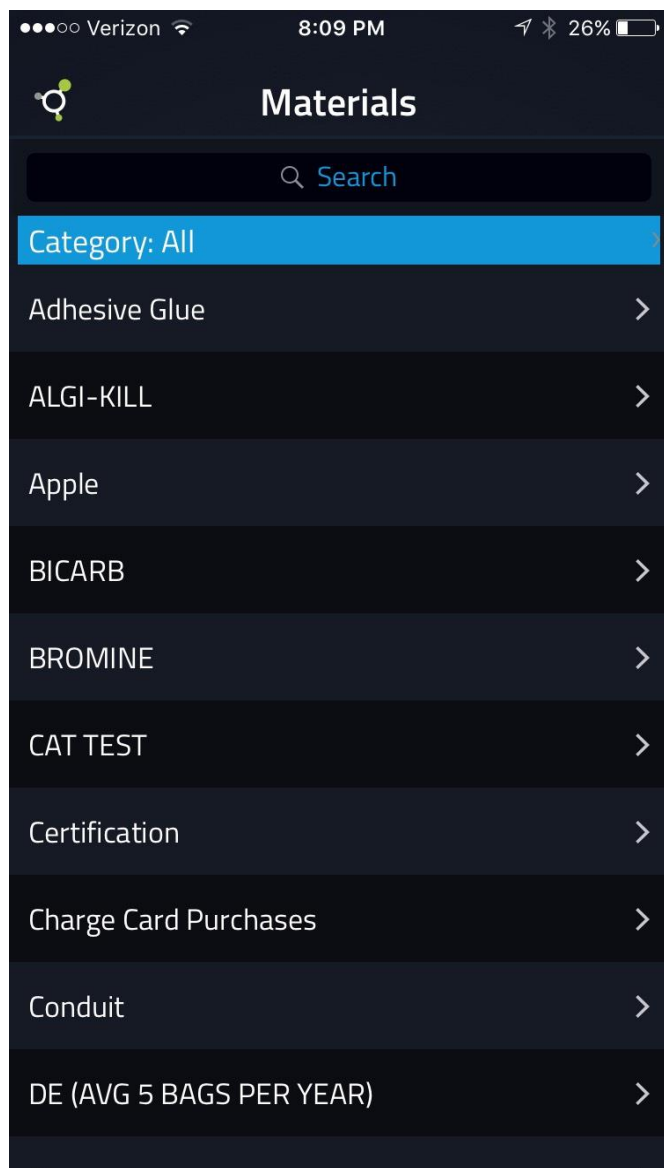
Notes:

"Material Details" Screen (expanded)

- 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

- Select quantity and choose ☑ to add parts to your work order.
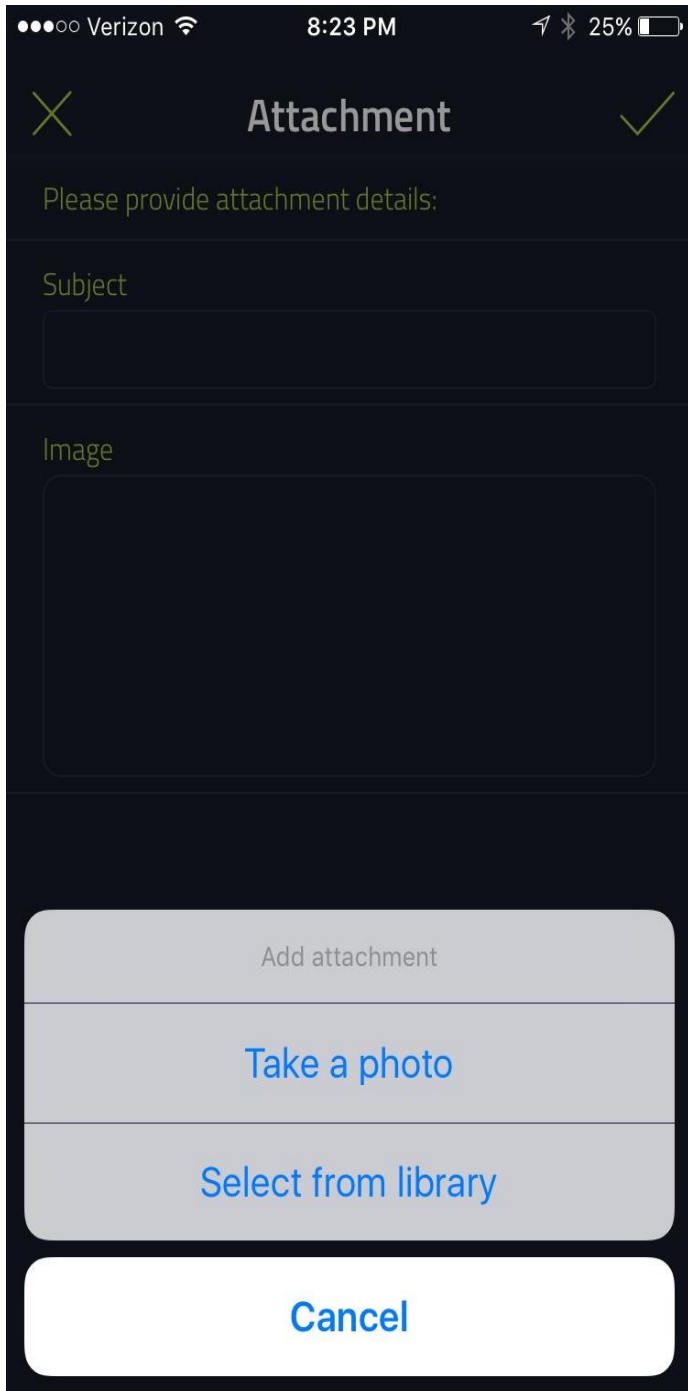
"Attachments" Screen (expanded)
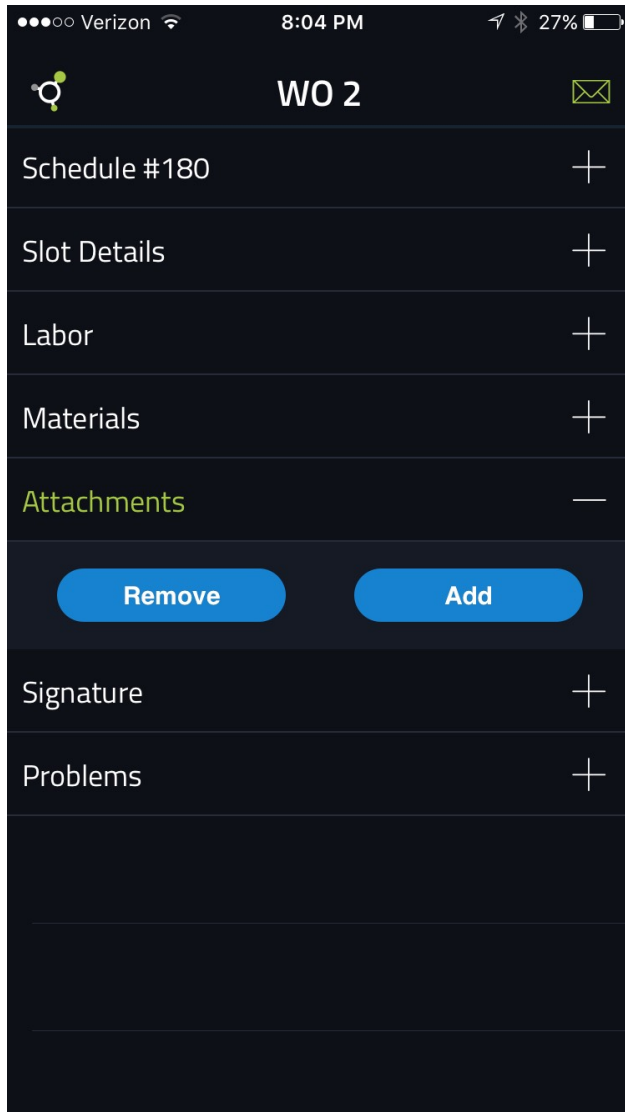
- Click the add button to attach pictures and or documents to a service call.

Notes:

Adding an Attachment

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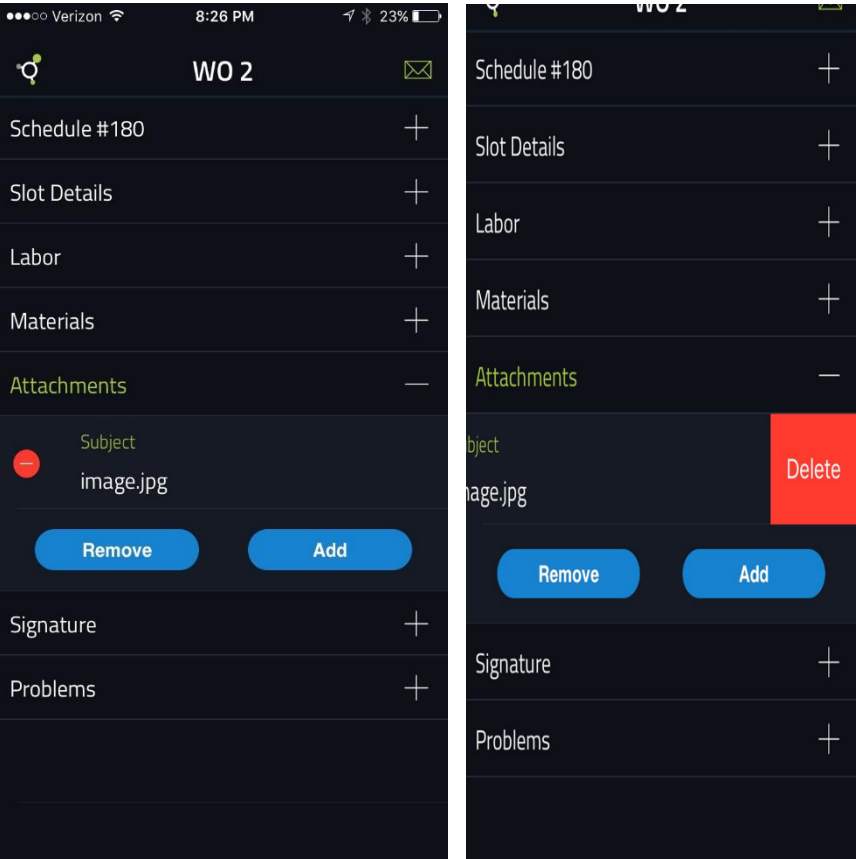
- Touch the red circle next to the file name so that it is checked.

- Press the red Delete to remove

Notes:

"Signature (Electronic) Details" Screen

Customer signs mobile device

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

Notes:

Emailing Work Order to Customer

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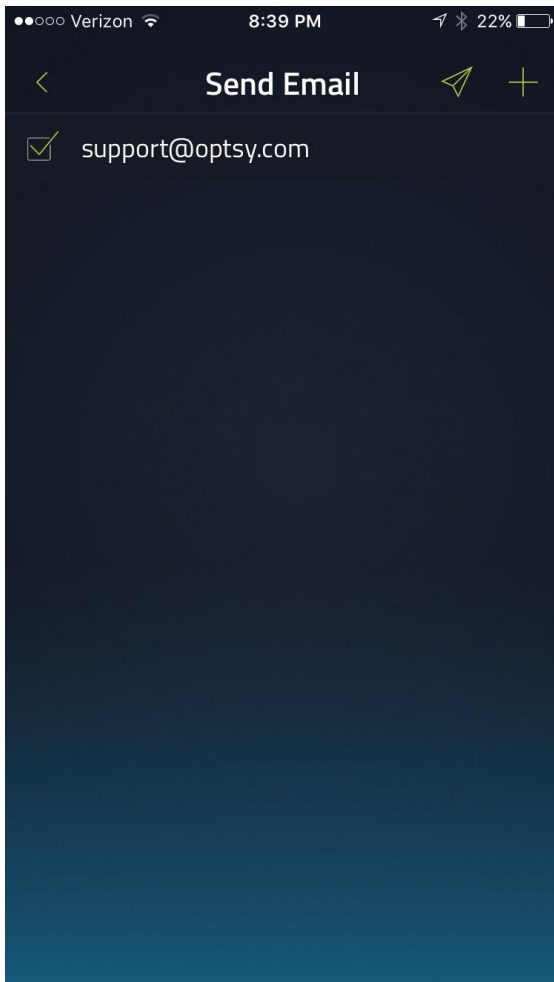
- Press the + and type in the customer's email address and press add. The email address will be added with a green check box next to it. If you need to remove or change the address, touch the check and it will uncheck the email.

- 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 - Zon
Address:	525 Titus Ave
	Rochester, NY 14617

Schedule Details:

Schedule ID:	4402	Scope of Work:	4664821-4AJ-64506
Start Time:	4/17/2013 9:45:00 AM		Graham
End Time:	4/17/2013 11:00:00 AM		

Items:

| Qty	Unit	Description	Unit Amt	Tax Amt	Total
1	Each	Plastic Spider Mount	$23.00	$0.00	$23.00
1	Each	Printr 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
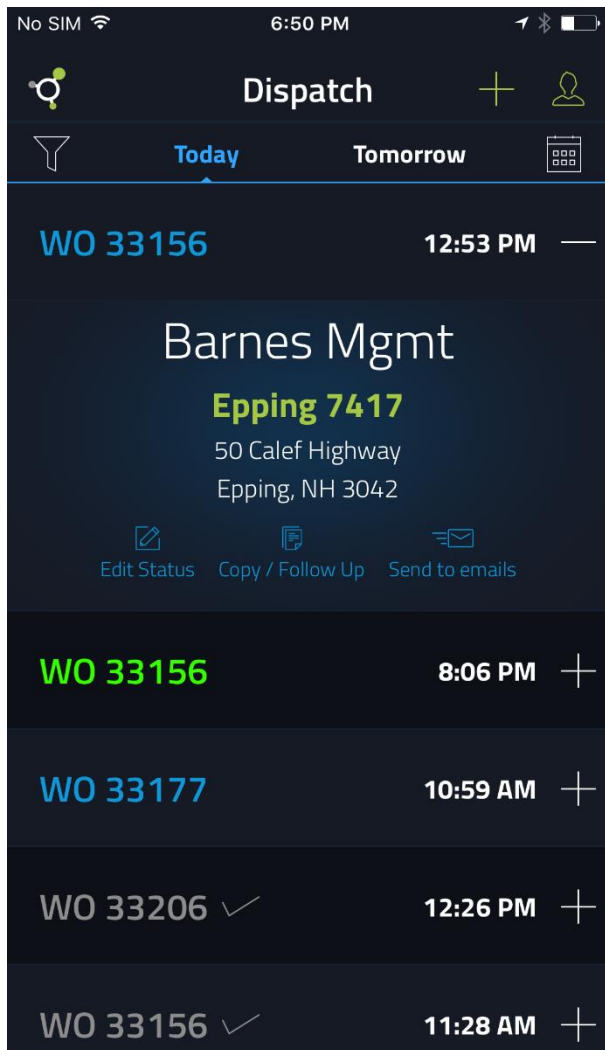
To schedule a follow-up call from your device:
1. Complete your call and sync with the server. Make sure to mark the call for follow up with a follow up note.
2. Press the Follow up button in middle of detail to bring up the follow up page.

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)

Field	Value
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

Field	Value
	Mar 11, 2016 10:00 AM
End Time	Mar 11, 2016 11:00 AM
Tech(s)	Rockets, Johnny, Admin
Split Schedule	(off)
Follow Up	(off)
Note	
Tech Note	

- 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)

Press the check to save the follow up schedule.

Notes:

Adding a New Call from the Mobile Device
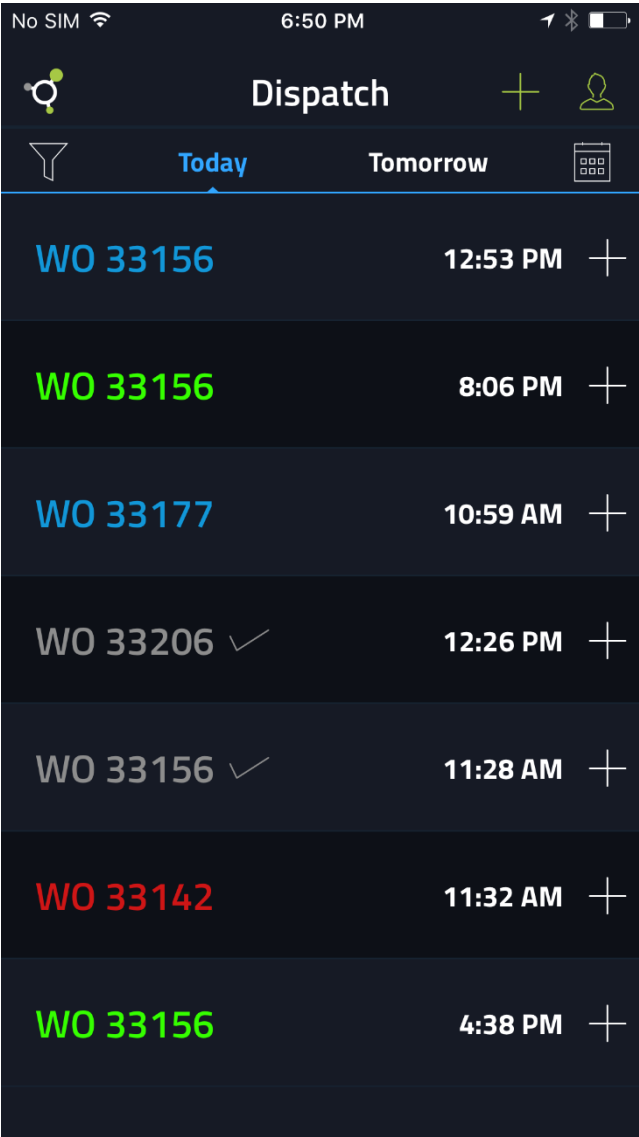
- From the dispatch board, press the + button for the option to add a new work order

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)

New Work Order

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)

.
- 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

- Touch the check box to create the schedule.

Tech(s)

- Select - ⌄

- Enter the technician. See Appendix A for details.

Start Time

End Time

- Enter the estimated start time and end time.

- Press check and save.

Note

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)

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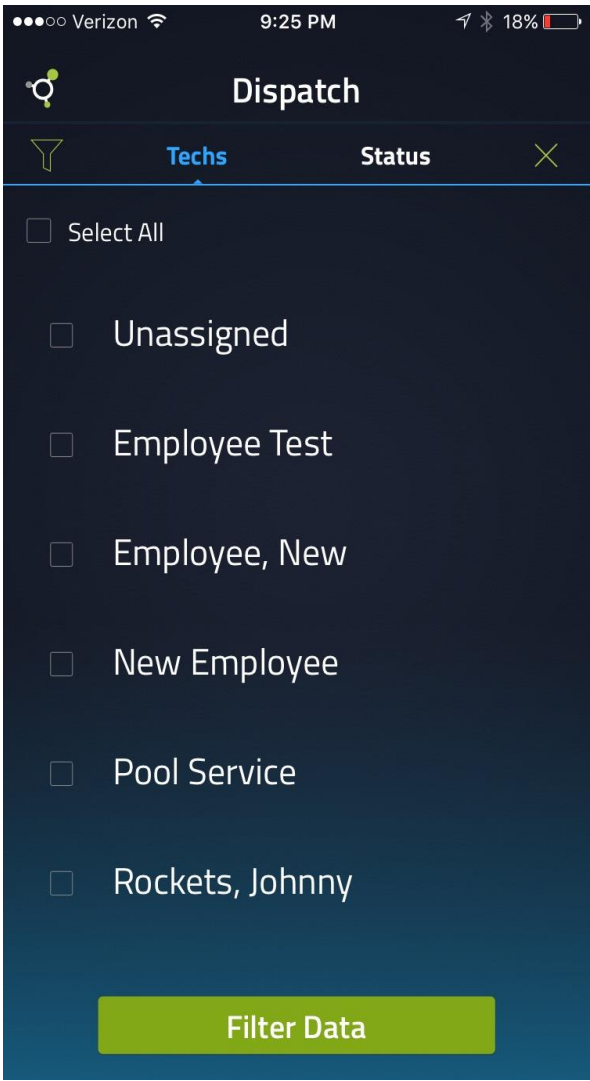
You must know the work order number in order to add an additional schedule. You will not have the option to search for the work order number.

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

Appendix A

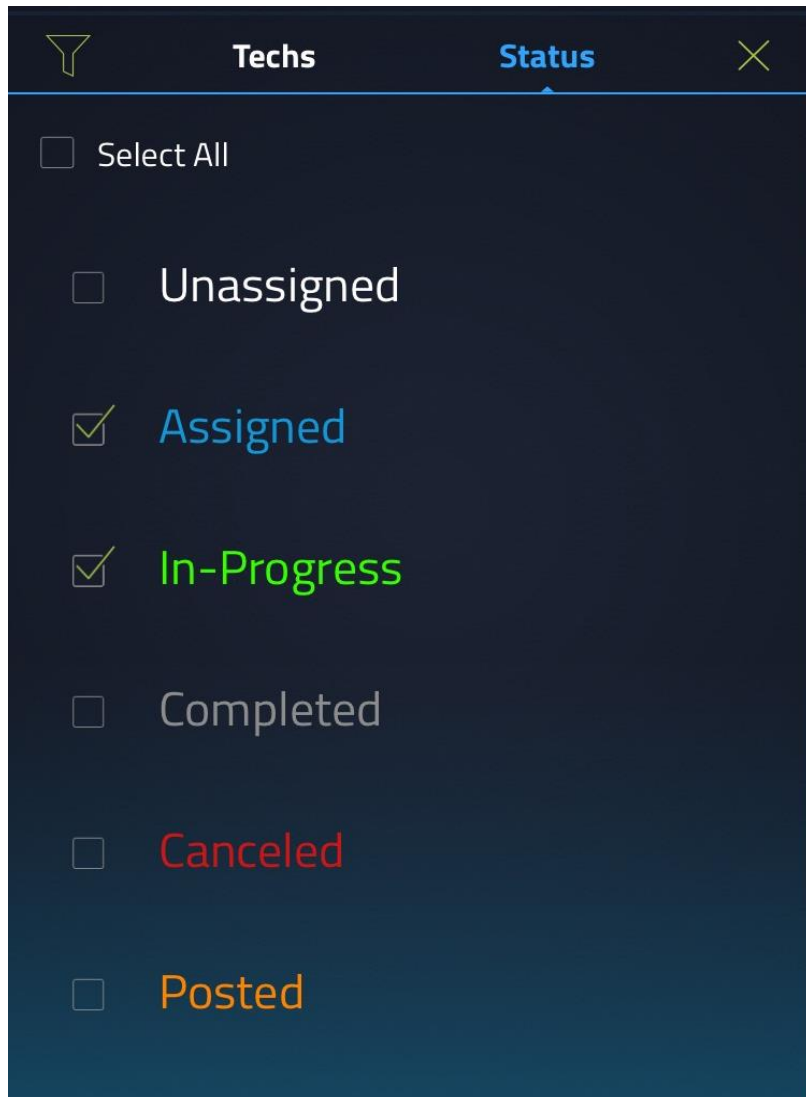## *Filter "Techs" (Technicians) Screen*

Notes:

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

Appendix B

Filter "Status" Screen

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 by modified
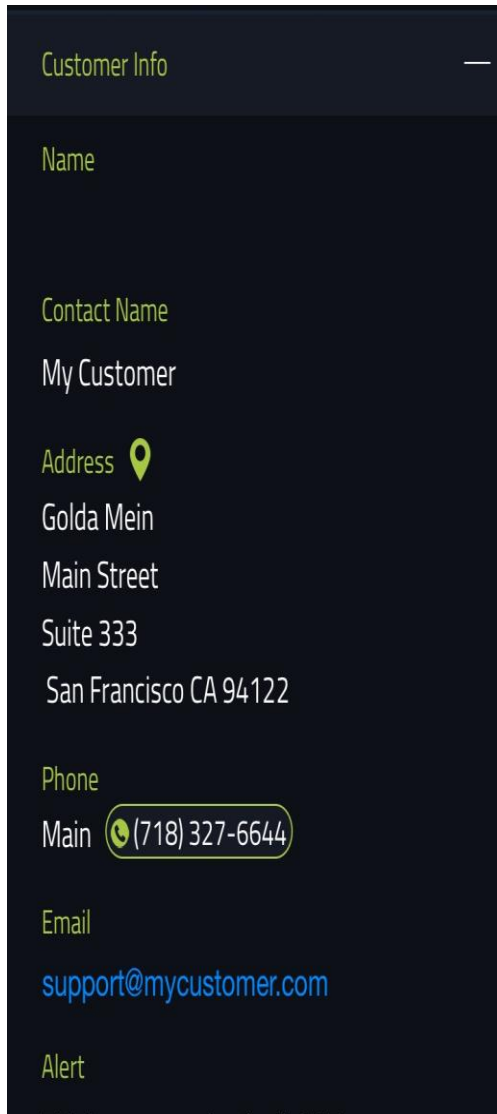
Appendix C

Billing Customer Detail from "Work Order Detail" Screen

Customer Info —

Name

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

- 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

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

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

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.