

JOBSTRAC

Phone User Guide



Ver 3.1.4

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Preface

JobsTrac Phone Application provides a simple, inexpensive way for businesses to track employee location, record shift and break times, receive Job/Work Order information from a GPS-enabled Android or iPhone on various networks.

Key features and benefits include:

- Record shift times
- Manage Jobs
- Create and manage invoice
- Use Dynamic Forms to capture information at customer location
- Automated Job alerts
- Improved accuracy in billing
- Reduced errors

With JobsTrac Phone Application, you can improve productivity and control costs for your field based operations. JobsTrac Phone Application helps you to easily track and record locations, hours worked, and Jobs performed by your field employees. JobsTrac eliminates the need for cumbersome and time-consuming paper processes.

JobsTrac Phone Application connects you with your field workers and offers real-time dispatching of Jobs based on users, Groups, shift patterns and more. With complete visibility on your employees, current status of each Job, you'll easily be able to assign mobile resources effectively to a new Job for maximum utilization, reduce overtime and provide on-time customer service.

JobsTrac enables field service team to receive, accept/reject and respond to Jobs assigned to them by the Manager from the JobsTrac Web Application. Field Users can also upload images and videos of the work done at customer's location and can capture digital signature of the customer on successful completion of Job. Field Users can also create quotations and invoices instantly for a part sold or service provided to a customer. This information is visible to the Manager on the JobsTrac Web Dashboard for review to ensure that the Job has been finished successfully.

About This Guide

This guide describes how a Field User can use JobsTrac Phone Application to perform daily operations. JobsTrac Phone Application covers the following features:

- ◆ Shift
- ◆ Job
- ◆ Messaging
- ◆ Invoices
- ◆ Dynamic Forms
- ◆ Notes (Upload Images, Audios and Videos)
- ◆ Navigation
- ◆ Settings
- ◆ Location

Intended Audience

This guide is intended for Field Users who have GPS enabled Android or iPhone with JobsTrac Phone Application installed on it. Field Users can capture information assigned to them by their Managers from JobsTrac Web Application and also allows them to perform operations like:

- ◆ Submit information on Shift times
- ◆ Update Job status
- ◆ Upload images, audios and videos related to a Job
- ◆ Submit Dynamic Forms
- ◆ Create Quotations and Invoices
- ◆ Submit GPS Locations
- ◆ Change settings

Organization of This Guide

This guide is organized into the following chapters.

Chapters	Description
Application Requirements & Behavior	Describes the information about the minimum resource requirements on a GPS enabled Android or iPhone, and the application behavior during data transfer.
JobsTrac Phone Application - An Overview	Provides an overview of JobsTrac Phone Application and various modules available in it.
Getting Started	Describes how to setup users and login to the Phone Application.
Shifts	Describes how to use JobsTrac Phone Application to start and end their shifts from phone. This includes, Start Shift, End Shift, Start Break and End Break.
Job	Describes how to receive Jobs and update Job Status from mobile. This also covers uploading of images, videos and audios.
Messaging	This covers how a Field User can exchange messages with Manager.
Invoicing	Covers how to create and manage Quotations and Invoices.
Forms	Shows how a Field User can use Dynamic Forms to capture information at customer location.
Other Options	Describes additional features of the Phone Application such as Change Password , View GPS Location , Settings , Navigation and Sync .

How to Use This Guide

Field User must begin by reading the [Application Requirements and Behavior](#) chapter to understand the minimum requirements to start using JobsTrac Phone Application. Then proceed with the [Getting Started](#) chapter to understand JobsTrac Phone Application home screen user setup.

	Note	As the screenshot illustrations in this guide have been captured using a phone Emulator, they may not be identical to the application screens in your Phone Application.
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Additional Help / Technical Support

Please contact JobsTrac support for any additional help.

Application Requirements & Behavior

The Application Requirements & Behavior chapter lists the application requirements and explains the application behavior.

Application Requirements

The requirements for running JobsTrac Phone Application are:

- ◆ Smartphone (Android or iPhone).
- ◆ GPS support.
- ◆ Packet data enabled.

Application Behavior

The Phone Application supports packet data transfer. Work done at customer location in no network mode will be stored and then synced over to JobsTrac Website as soon as the device gets back on to the network.

	Note	Screens might vary from actual application to the application installed on phone
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JobsTrac Phone Application - An Overview

JobsTrac Phone Application can be configured to work on any GPS enabled Android or iPhone. Following features are available to Field Users on their phones:

- ◆ **Shift**

Shift feature allows a Field User to record Start Break and End Break along with the standard Start Shift and End Shift times from their phones.

- ◆ **Send Location**

Location feature captures the location of Field User and sends it over to JobsTrac Web. This also allows a Manager to record and track at Field User location at regular intervals.

- ◆ **Job**

Job allows Field Users to download their scheduled Jobs on phone. The status of Jobs can be updated to Job Accept, Job Reject, Job Start or Job End. Once downloaded, the Jobs are available to the Field Users and stay in phone for future use.

- ◆ **Messaging**

Messaging feature helps to send and receive messages. Field Users can also use custom messages and can send Email to a user.

- ◆ **Forms**

Dynamic forms are available to Field Users which can be used to fill specific information at customer's location. These forms are created and assigned to specific Field Users by Manager.

- ◆ **Invoicing**

This feature facilitates a Field User to create Quotations and Invoices for a part sold or service provided to the customer. These Quotations/Invoices are visible to Manager on JobsTrac Web Application.

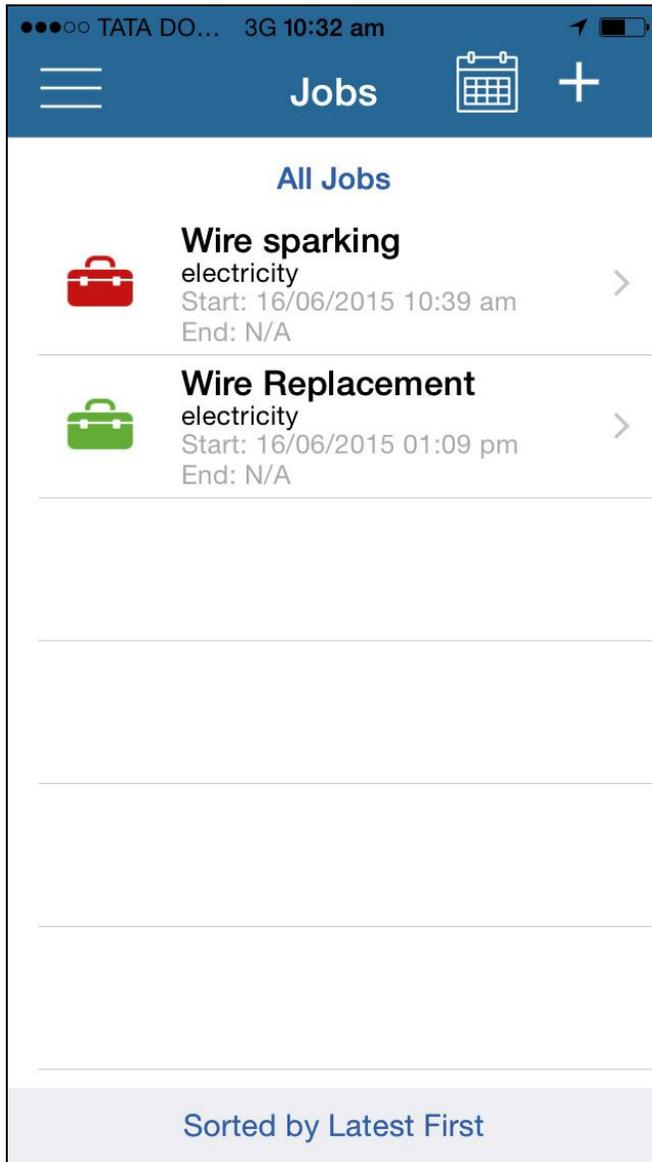
- ◆ **Notes**

This feature allows a Field User to capture and upload Images, Audios and Videos related to a Job instantly from their phones. These files are synced and available to JobsTrac Web User or Manager for review to ensure that the Job is completed,

Getting Started

This chapter provides information about JobsTrac Phone Application home screen and user setup. The application can be accessed using a phone.

Home Screen



JobsTrac Application Home Screen

	Note	As the screenshot illustrations in this guide have been captured using a phone emulator, they may not be identical to the application screens in your phone application.
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User Setup

Users in JobsTrac can only be created from the JobsTrac Website <http://account.jobs-trac.com>

Following types of users can be created in JobsTrac:

- o Manager
- o Field User
- o Customer

Account of each user is created (And activated/inactivated) by the Manager. Managers need to ensure that Field Users must be set up before they can start using JobsTrac Phone Application. (For more insight into User Types and creating users, please refer JobsTrac Web User Guide). After fresh Sign Up, by default a Field User is created and the login details are emailed to the Email used during Sign Up.

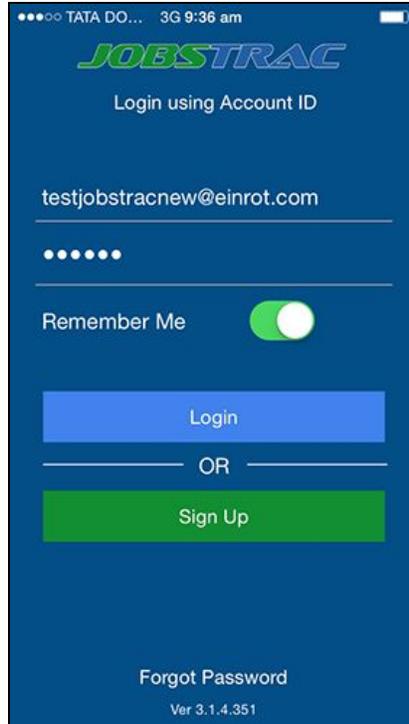
Log-in using your Email and Password

To access various features of the application, first a Field User needs to login:

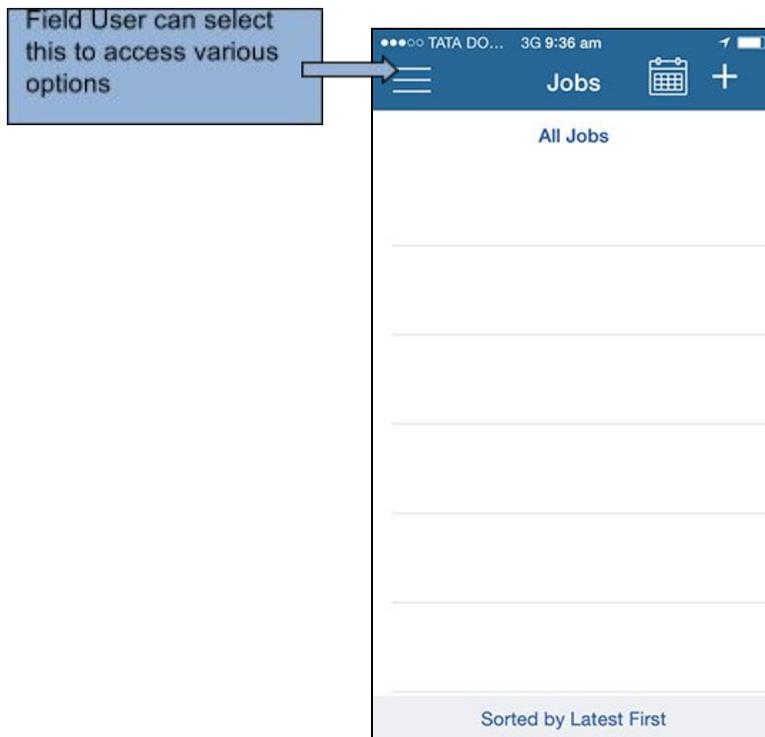
After starting the application, Flash Screen appears as shown:



From the flash screen, press anywhere to go to Login Screen. The Login Screen appears as shown:

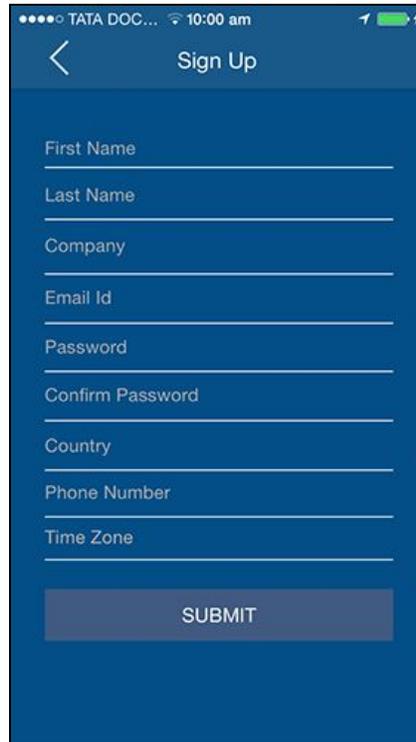


Field User will enter Email and Password to login. He can choose the option to remember password. User will hit the **LOGIN** button to login. JobsTrac phone application home screen will appear as shown.



	Note	If you do not have a Username and Password , contact your Manager.
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Users can also signup from the login screen. After clicking on sign up following screen will appear:



When this information is provided, JobsTrac phone application validates this information with the actual data. When all the information is validated correctly, Home screen of the application appears. Else, LOGIN screen reappears prompting you to enter the correct login credentials.

Note: If phone is out of network, user will not be able to login to the phone application but he can perform other events.

Shifts

Shifts functionality describes how a Field User can start and end their shifts using the Phone Application. The available options are Start Shift, Start Break, End Break and End Shift.

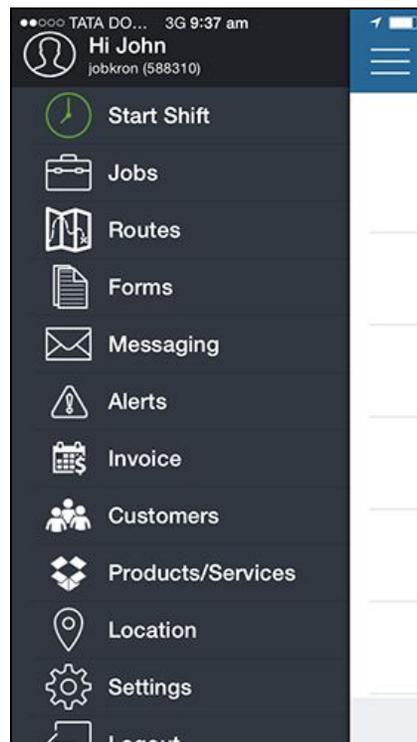
The Shift times are mutually exclusive events. In other words, Start Break cannot be entered unless the Start Shift is already done or a End Shift unless End Break is already done. Click on the required links below to know more information about the features based on Shifts.

- ♦ [Start Shift](#)
- ♦ [Start Break](#)
- ♦ [End Break](#)
- ♦ [End Shift](#)

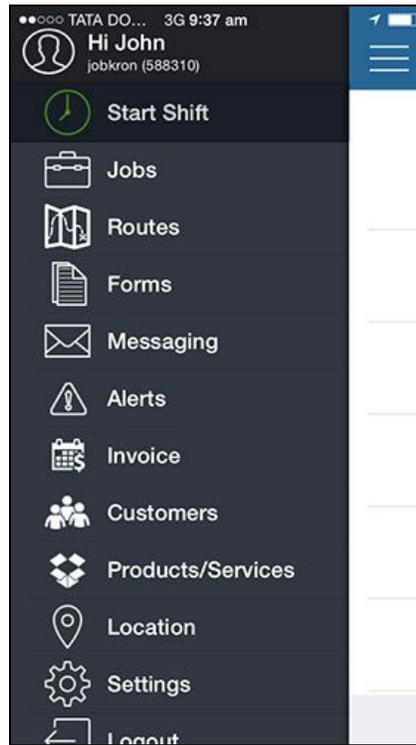
Start Shift

Start Shift menu option allows the Field Users to start their shift. When shift is started, the Start Shift time is captured and is visible to Manager on JobsTrac Website. Along with the event, current location of user is also sent. To start a shift on the phone, follow these steps:

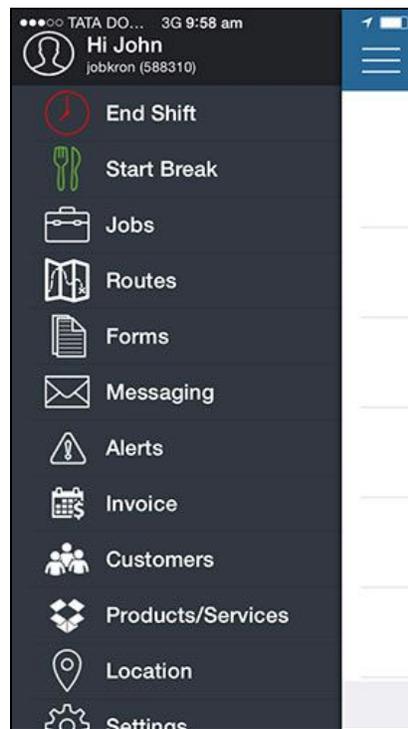
1. Field User can start shift by selecting menu bar from the home screen as shown:



2. User will select Start Shift to start the shift as shown:



3. Shift will start and a confirmation message will appear as shown:



	Note User will be able to perform this operation in no network area also.
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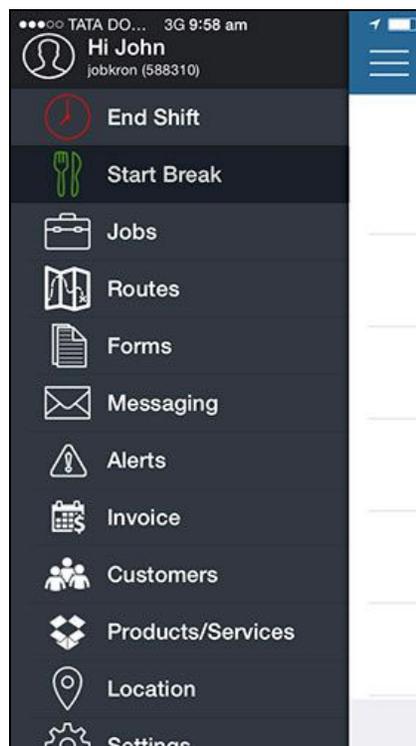
Start Break

Start Break allows the Field User to start break. Start Break event is captured along with the user location and is visible to the Manager.

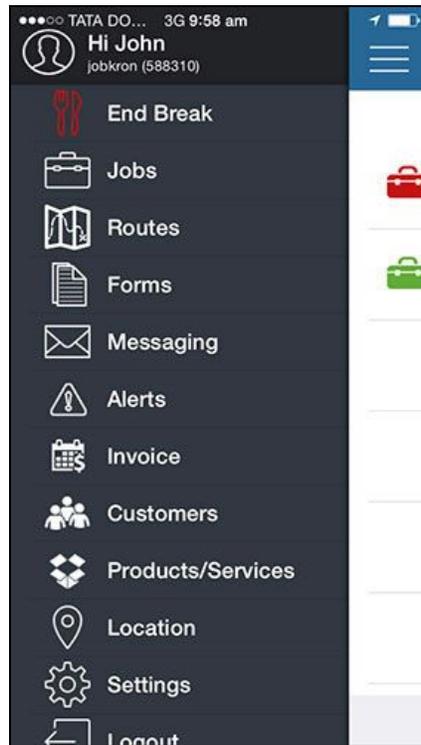
	Note	This feature is visible on the phone only after Start Shift event is done. User can perform this operation in no network area also.
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To start your break, follow these steps:

1. From the menu, select the **Start Break** menu option as shown:



2. Event will be captured and following screen will appear after selecting Start Break:

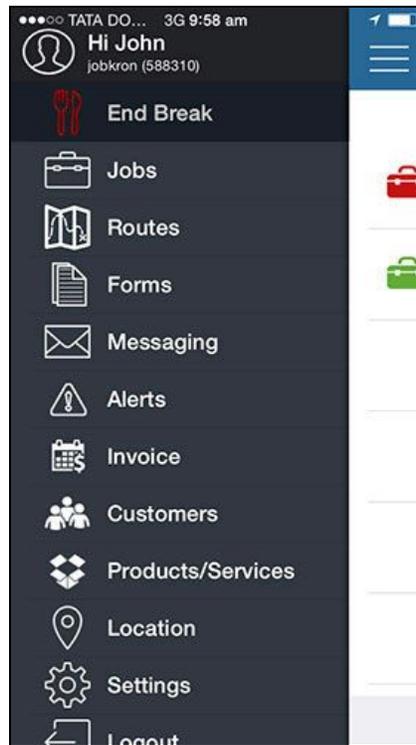


End Break

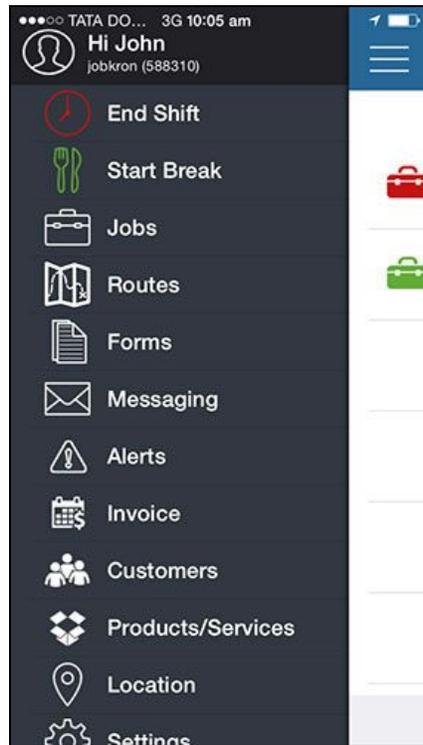
End Break option facilitates Field User to end their break. Event gets captured along with the location of user and is visible to Manager on JobsTrac Web Application.

	Note	This feature is visible on the phone only after <i>Start Break</i> event is done. User can perform this operation in no network area also.
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1. From the menu, select **End Break** menu option as shown:



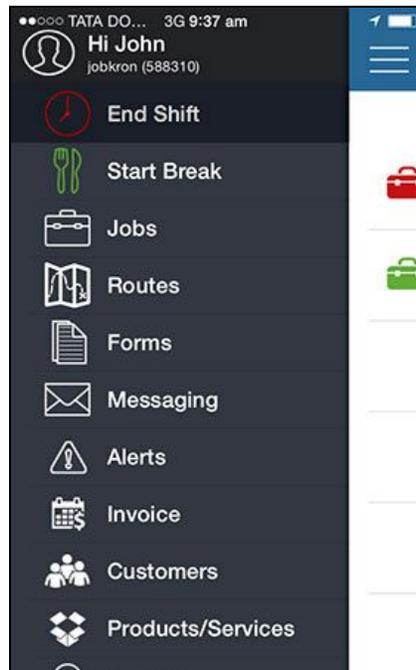
2. End Break event will be captured and confirmation message will appear as shown:



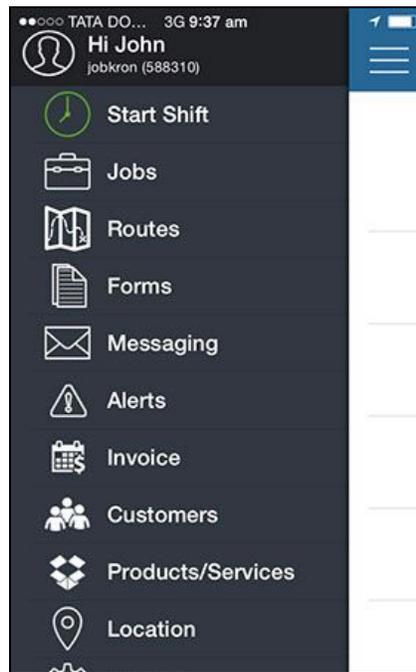
End Shift

End Shift option allows the Field User to end their shift. To end shift follow these steps:

1. When **Shift** has been started, the **End Shift** option appears automatically on the main menu.



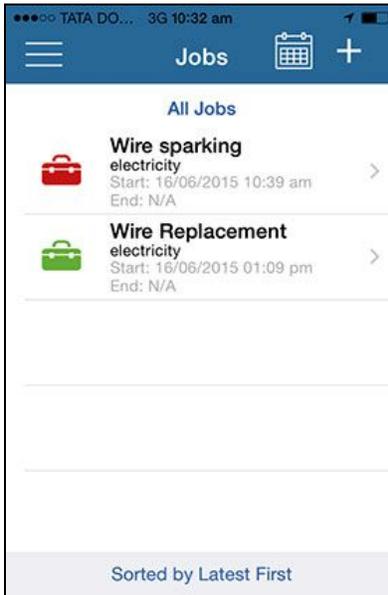
2. Shift will end and a confirmation message will appear as shown:



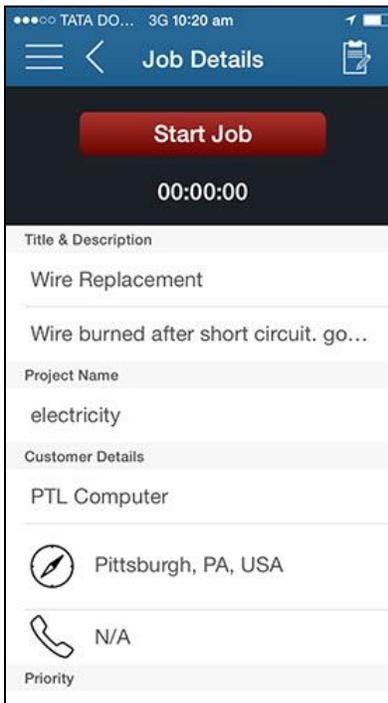
Job

Job functionality describes how to use Phone Application to receive and accept/reject Jobs. Field user can view accepted Jobs and can update their status accordingly.

To know how to view Job details please refer [Jobs](#)



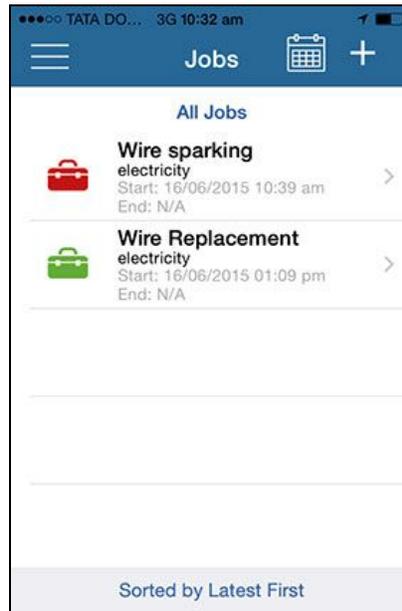
After selecting a Job, Job Start will be required. Following screen will appear:



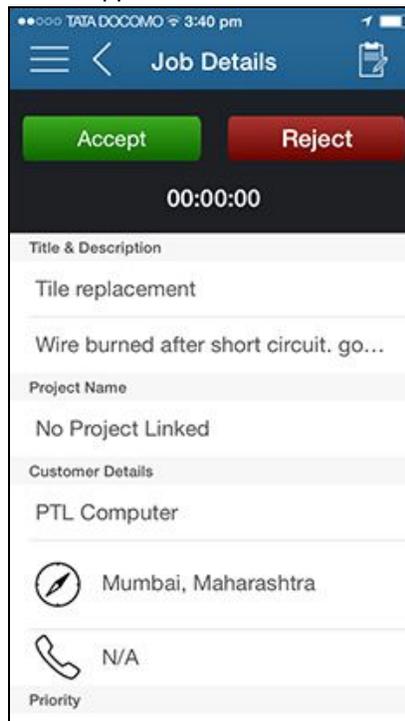
Jobs

Jobs allow a Field User to view Jobs that are assigned to them from JobsTrac Web Application. Home screen appears as soon as a Field User logs in. Home screen shows the Jobs which are received and accepted by the Field Users.

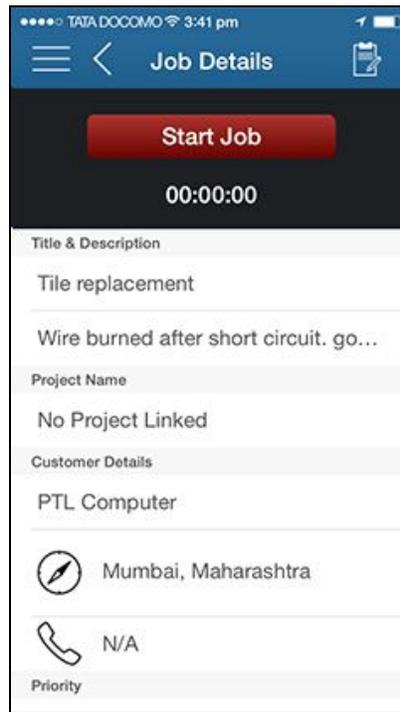
1. Following screen appears as soon as a Field User logs in:



2. Application will automatically check for any new assigned Jobs and new Job received will be visible on phone. Following screen will appear:



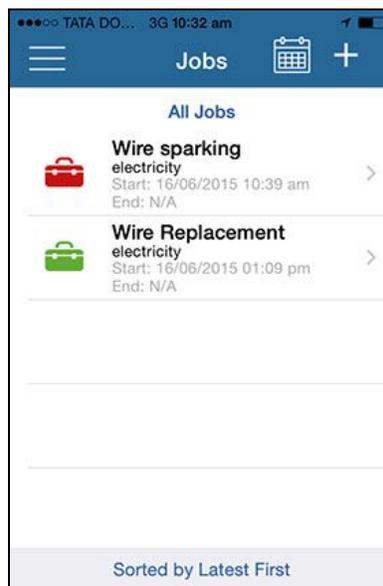
3. User will press **Accept** option to accept the Job and **Job Accepted** message appears:



Field User can also reject the Job if required. Next Job detail appears automatically if more than one Job is assigned to the Field User. All the accepted Jobs appear on the home screen.

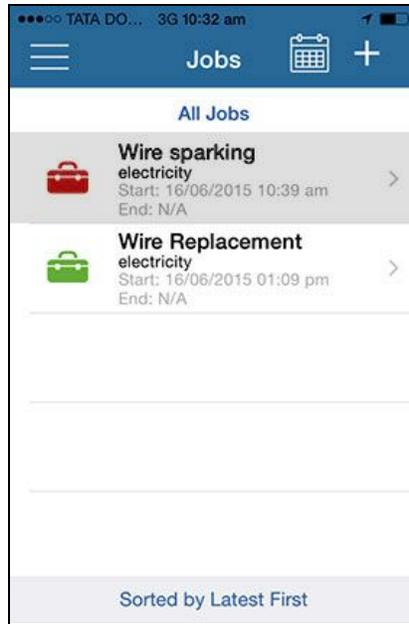
Job Details

Job Details allows a Field User to view details of accepted Jobs. Accepted Jobs will be visible to the Field User on the home screen as shown:

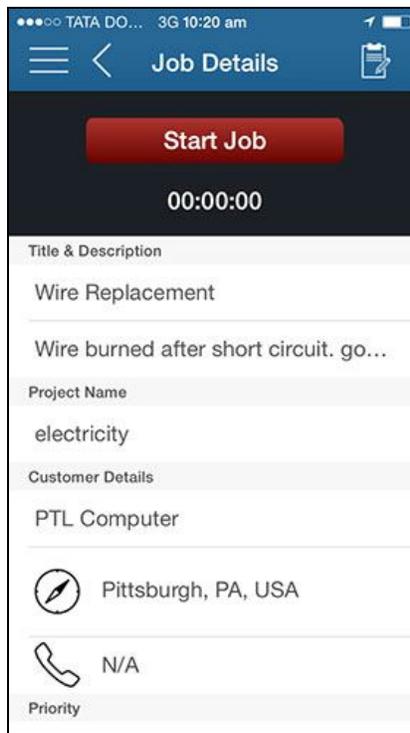


Note: In case of Critical and High priority Jobs, Job details will be followed by ★★ and ★ respectively.

2. Field User will select any desired Job to view its details as shown:

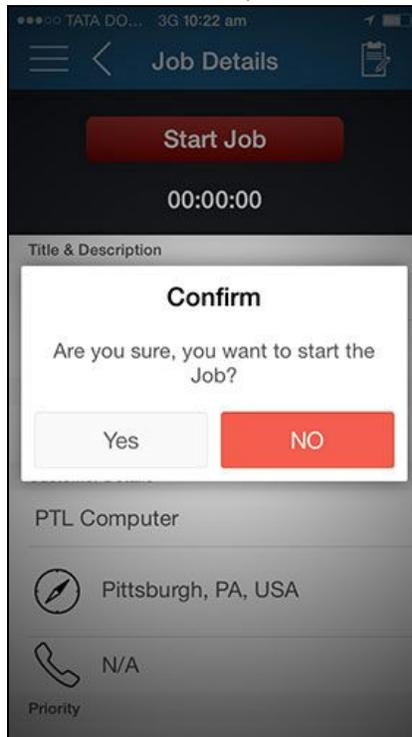


3. User will select desired Job to view Job details. Following screen will appear:

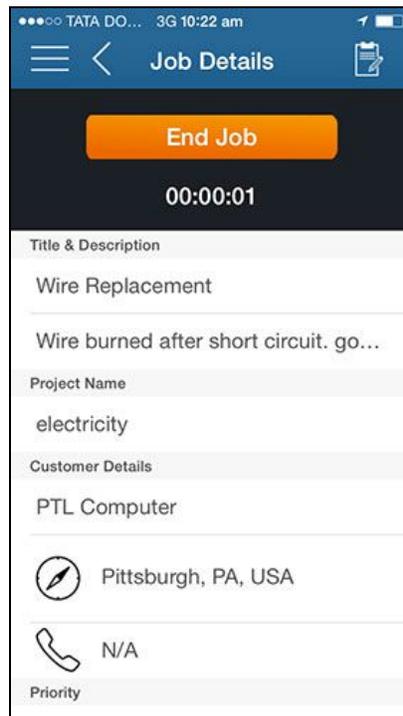


Start Job

To start a Job, Field User can select **Start Job** from previous screen. Following screen appears:



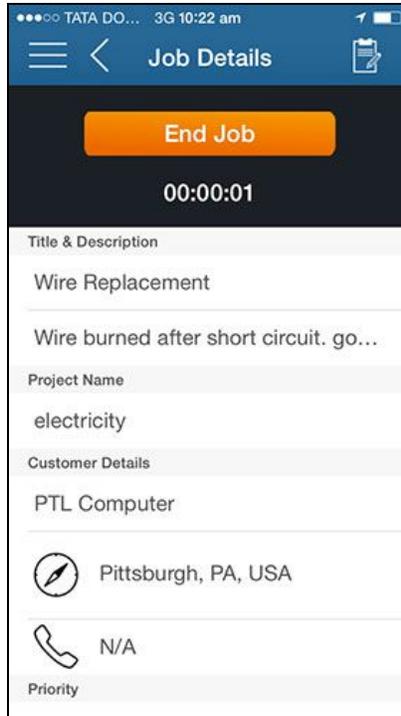
User will click on **Yes** to start the Job. Following screen will appear:



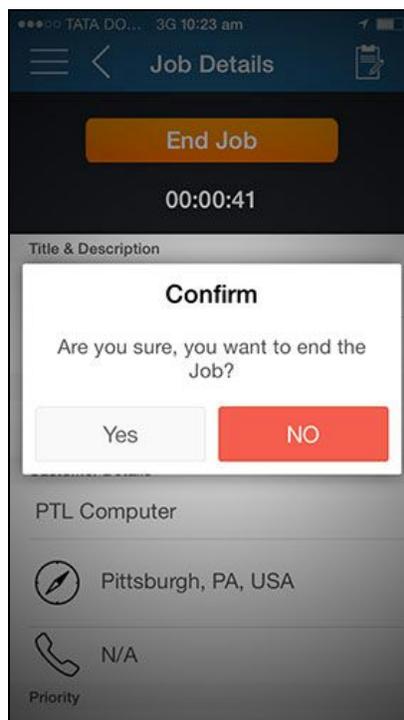
Job will be started and timer will automatically start showing the elapsed time for Job.

End Job

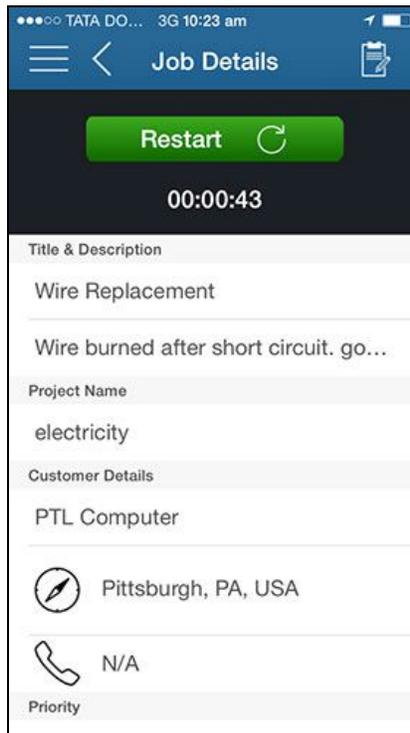
To end a Job, Field User will select **Job End** from the following screen:



2. A message will appear asking user for confirmation as shown:



3. User will select **Yes** to confirm. Job will end and following screen will appear:



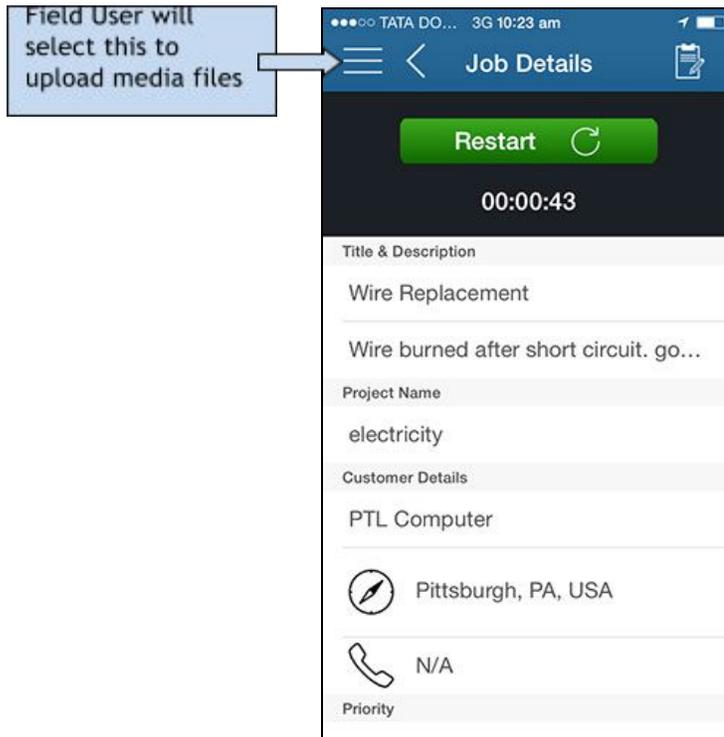
Notes

Notes allows a Field User to capture pictures, audios and videos related to Job once the Job is finished at customer's location. Following options are available under Media:

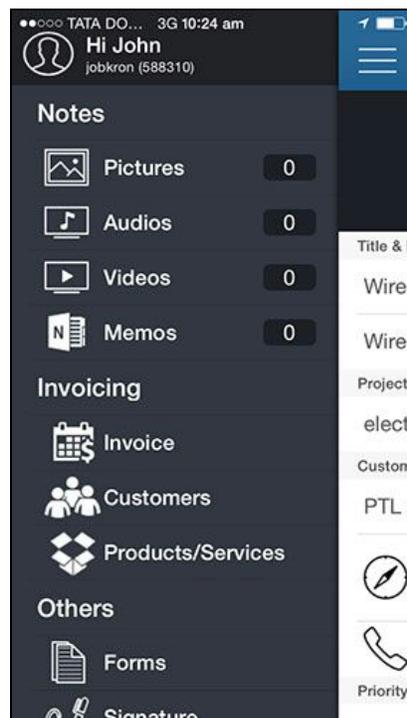
- ◆ Pictures
- ◆ Audio
- ◆ Video

After capturing pictures, audio and videos, Field User can synchronize them to upload them on the server. The uploaded files will be accessible to Manager for viewing on JobsTrac Web Application. Field User can follow these steps to upload media files:

1. After Job is completed, Field User will select menu option from the same screen as shown:



2. After selecting menu, following screen will appear:



3. In order to capture images for a Job, Field User will select **Pictures** option. Camera will start automatically and following screen will appear:



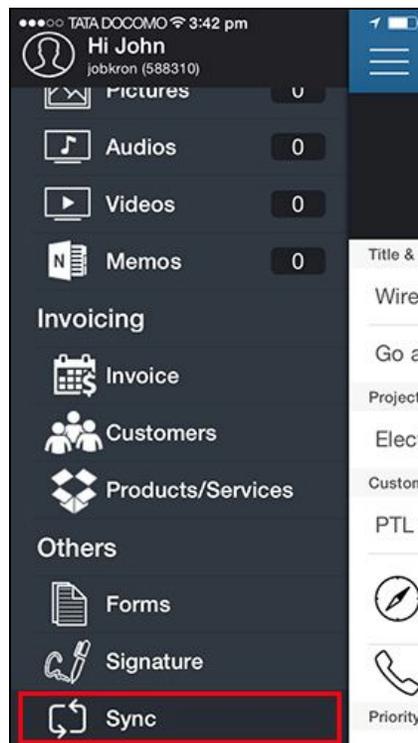
4. Field User can capture image. Once image is captured it will be asked to save automatically as shown:



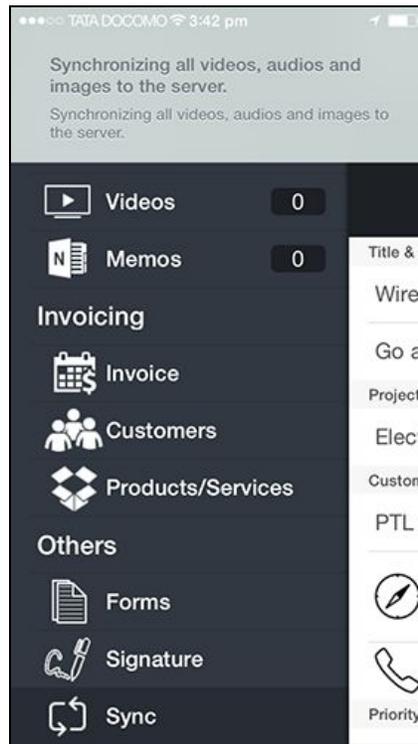
5. User will click on Use Photo option. He will be asked to save the image. User will specify the name of image as shown:



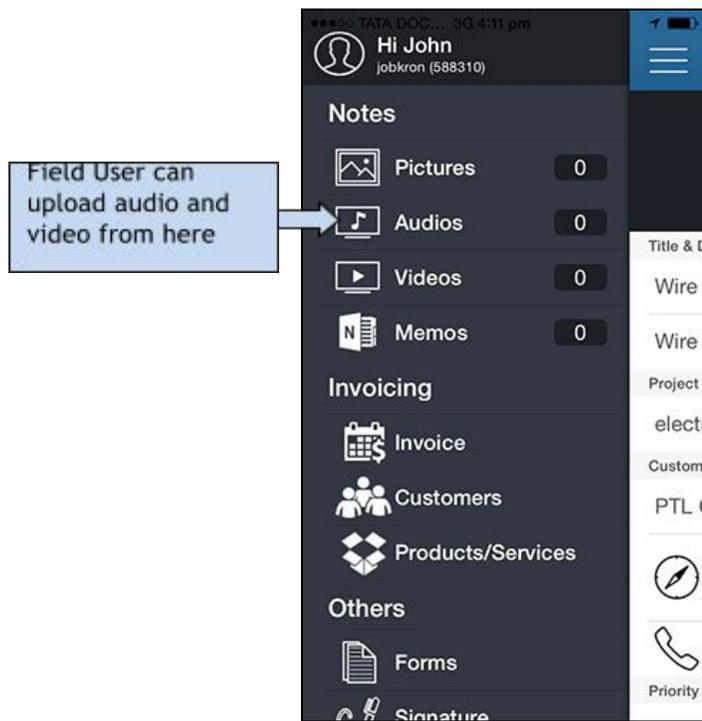
6. After saving user will go to synchronize screen from where he can sync the image on server:



7. User can click on Synchronize button to sync the files on server. Following screen will appear after syncing:



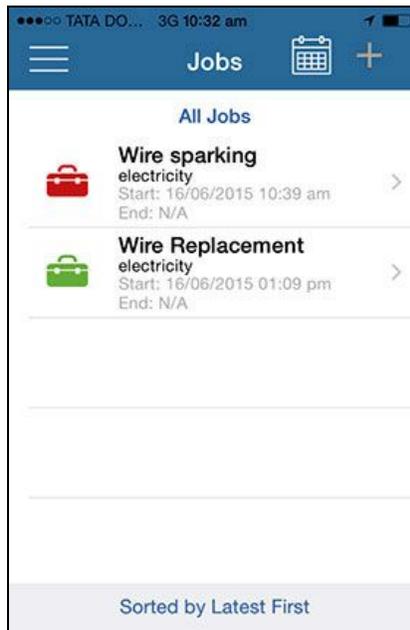
Similarly Field User can capture audio / video from menu screen and can sync them on server.



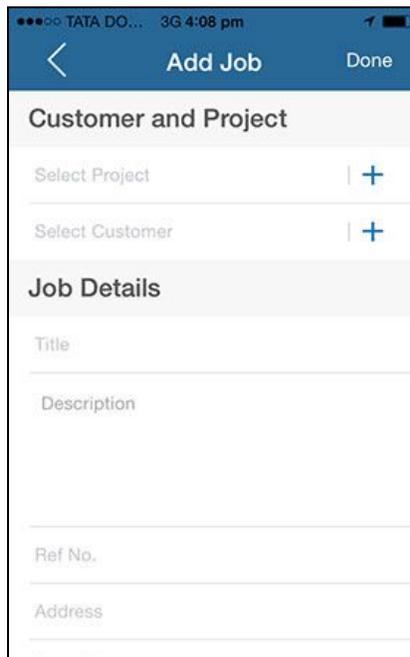
Add Job

Add Job feature allows a Field User to add Jobs from their phones. For adding Jobs follow these steps:

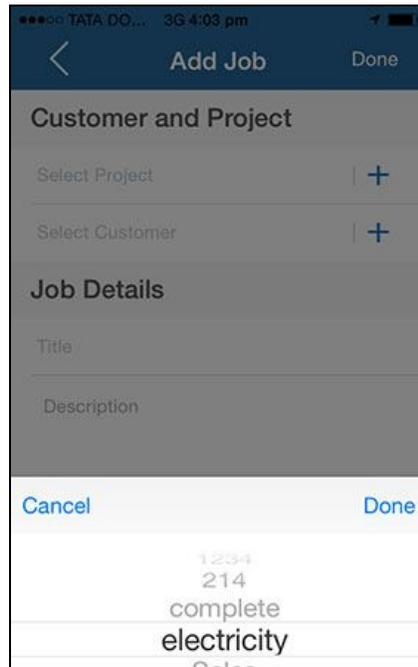
1. Field User will select Add Job from the home screen as shown:



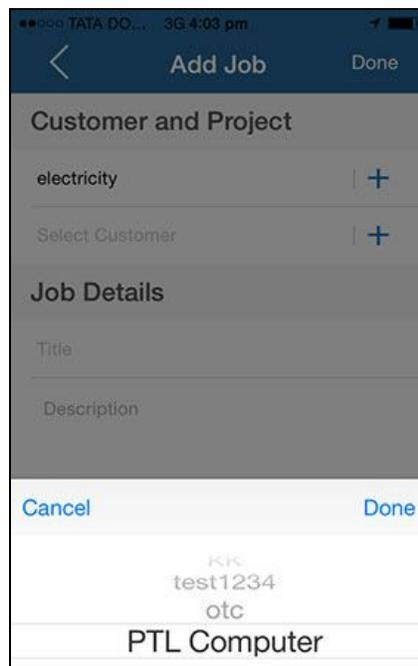
2. Following screen will appear after selecting Add Job:



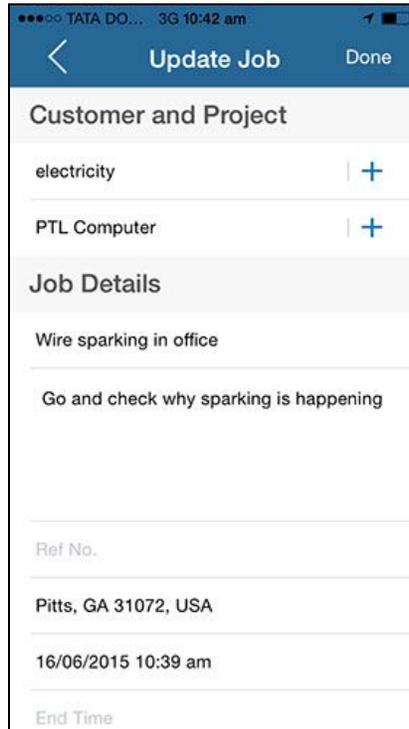
3. Field User will select a project. A list of existing projects will appear as shown:



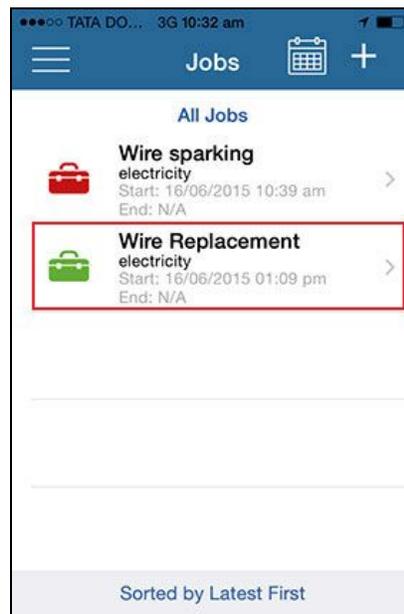
4. Field User can also select Customer name from list of existing Customers as shown:



5. After adding project and customer Field User will input other job details and will select **Create Job** button as shown:

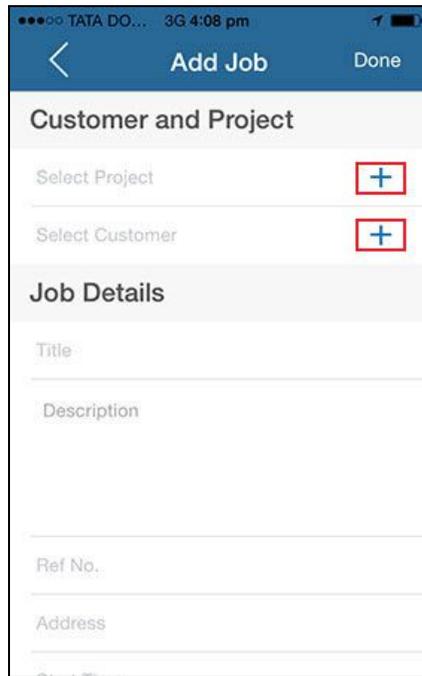


6. A confirmation message will appear and Job will be added. This Job will appear on the home screen as shown:

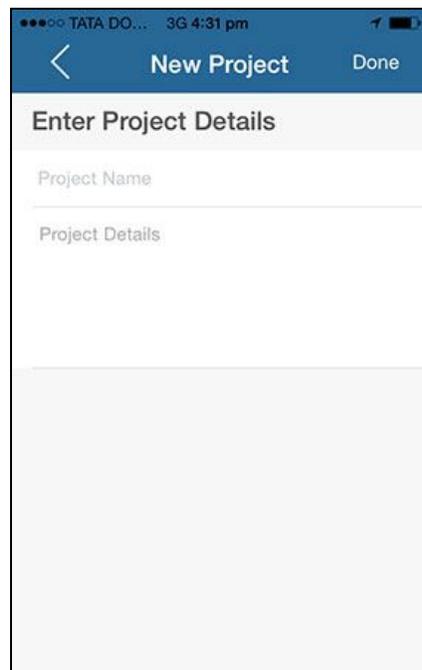


Field User can select the Job, view details and can start Job if required. To know more about Job details refer [Job Details](#). To know more about starting a Job, refer [Start Job](#).

Field User can also add Project and Customer dynamically from Add Job screen by clicking on '+' icon as shown:

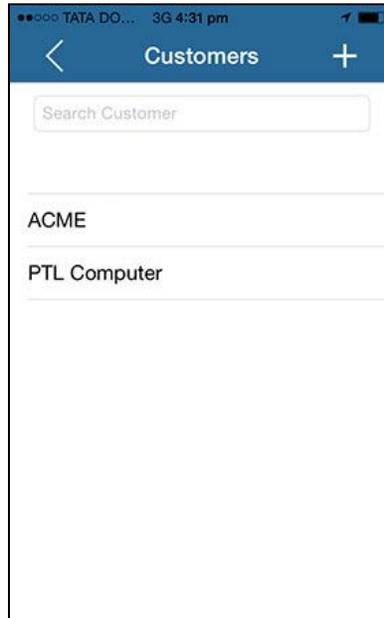


Following is the Create Project screen from where Field User can create a new project:



Field User can add a new project and it will appear in the project list.

Following is the Create Customer screen from where Field User can create a new customer:

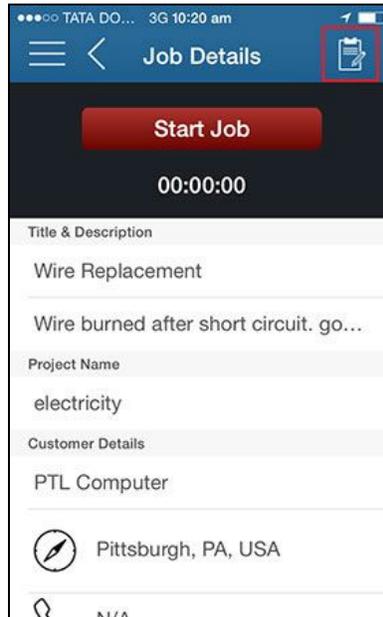


New Customer will appear in the list of already existing Customers from where Field User can select it while adding a new Job.

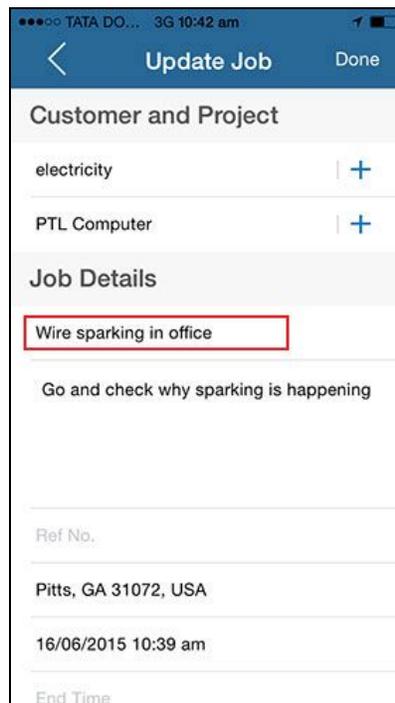
Edit Job

Edit Job feature allows a Field User to edit a desired Job. In order to Edit a Job, Field User will follow these steps:

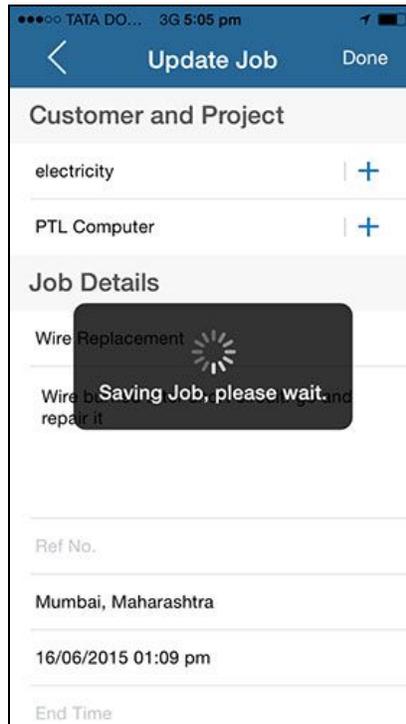
1. From the Job details screen, Field User will select Edit icon as shown:



2. Screen with Job details will appear where User will change the desired information and will select **Update Job** button as shown:



3. Job details will be updated and a confirmation message will appear as shown:



4. Edited Job will be visible on the home screen as shown:



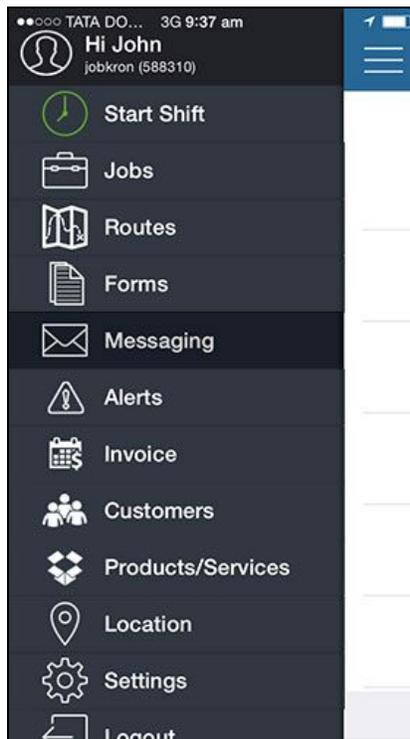
Messaging

Messaging allows a Field User to receive and exchange messages with Manager.

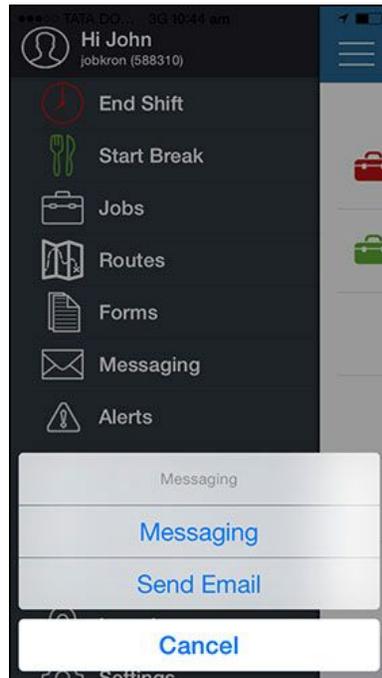
Send Message

Send Message feature allows a Field User to send message/custom message to the Manager. To send a message, follow these steps:

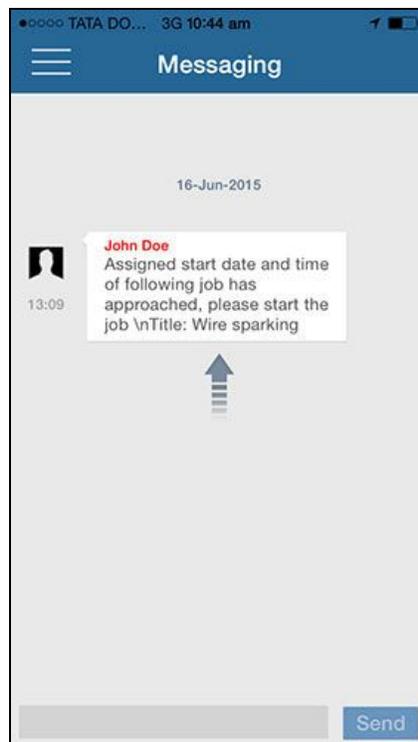
1. From the Menu, select **Messaging** option as shown:



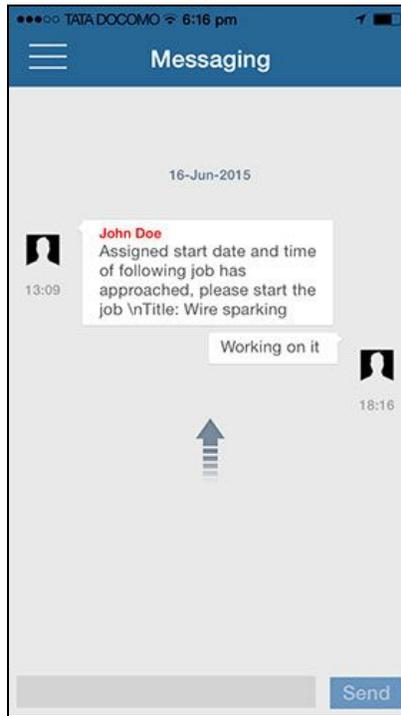
2. Following options are available for user as shown in the screen:



3. User will select **Send Message** to send a message. Following screen will appear where Field User will enter desired message:



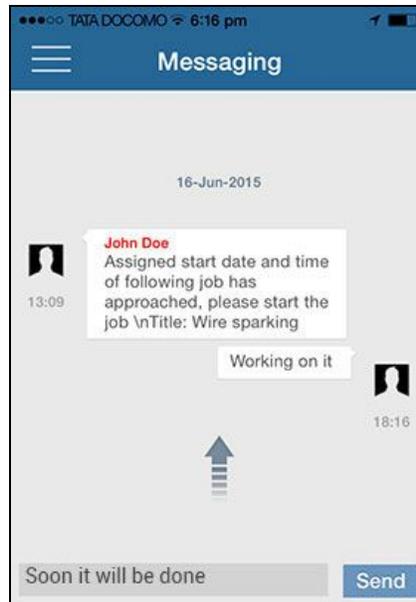
4. User will click on **Send** button to send the message. A confirmation message appears:



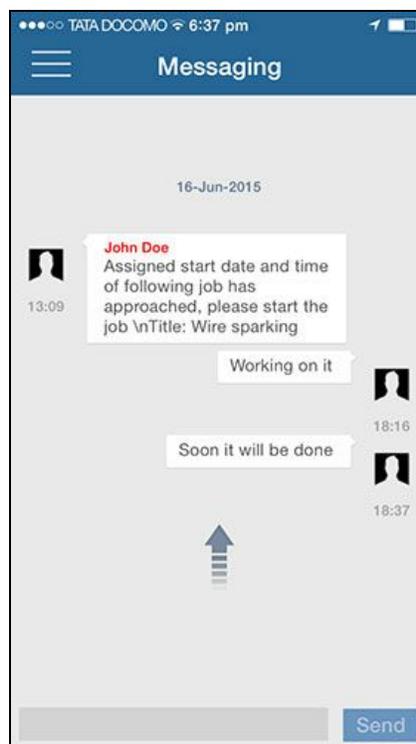
	Note User can perform this operation in no network area also.
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Custom Message

In order to use custom messages created by Manager from JobsTrac Web, user will select **Quick Messages**. A list of custom messages will appear which can be selected as shown:

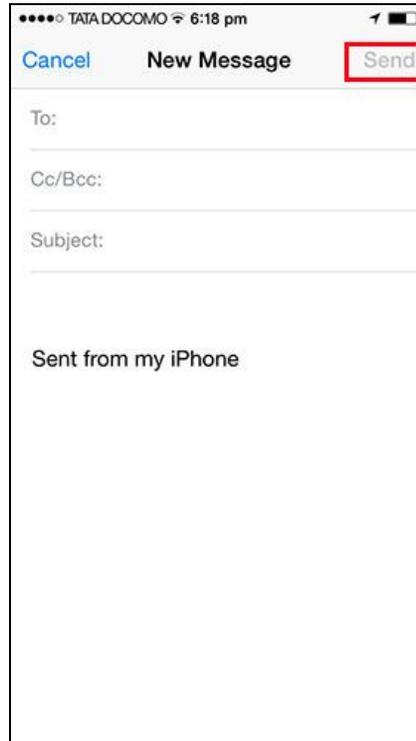


The selected custom message will automatically appear in the message area as shown:



Field User will click on **Send** button to send the message.

Field User can send an email to desired person by selecting **Send Email** option from message menu screen. Following screen will appear where user can specify details and will click on **Send** button to send email:



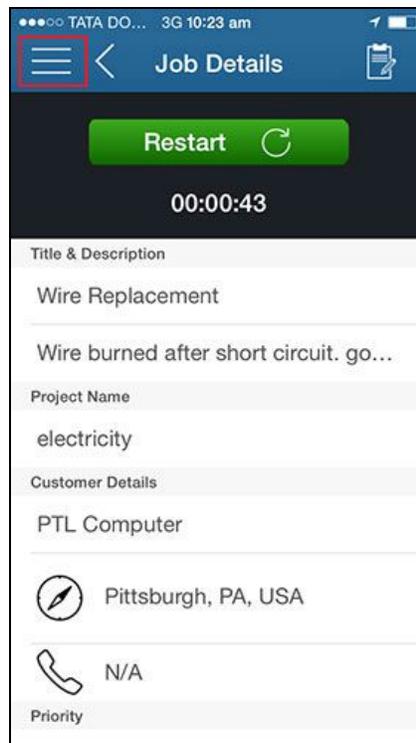
Invoicing

Invoicing feature allows Field User to create Transactions, Quotations and Invoices at the customer location once the Job is completed. Invoice will be visible to the Manager on the web interface. Invoice can be created by either adding amount for parts sold or any service provided to the customer.

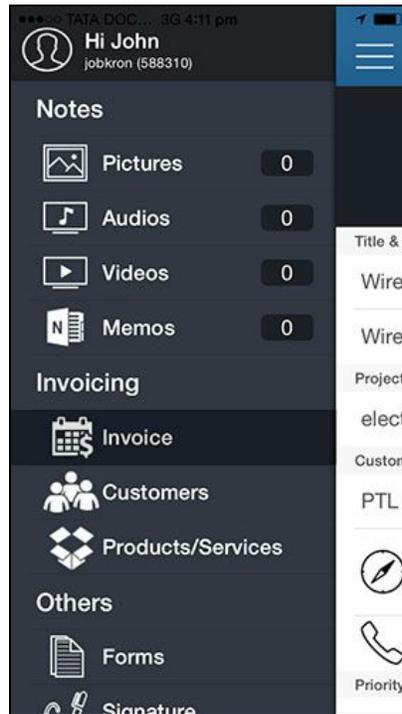
Charges

This option allows the Field User to add transactions of amount. The amount can be anything such as a part sold or service provided to the customer.

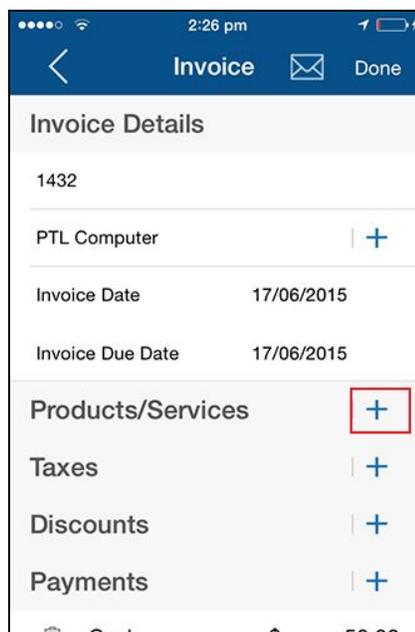
1. In order to add a Service charge Field User will select Menu from the Job completion screen as shown:



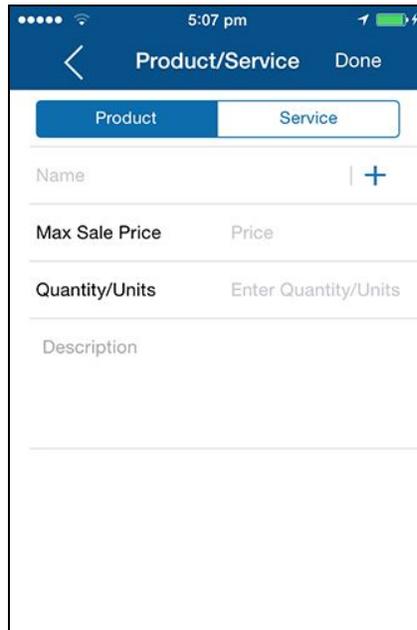
2. After selecting Menu following screen will appear:



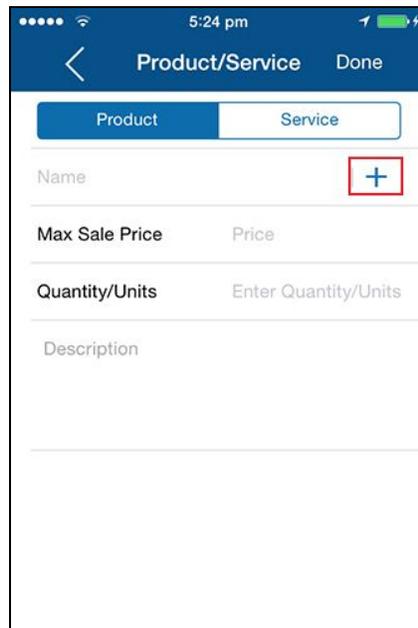
Field User will select product/services from the screen.



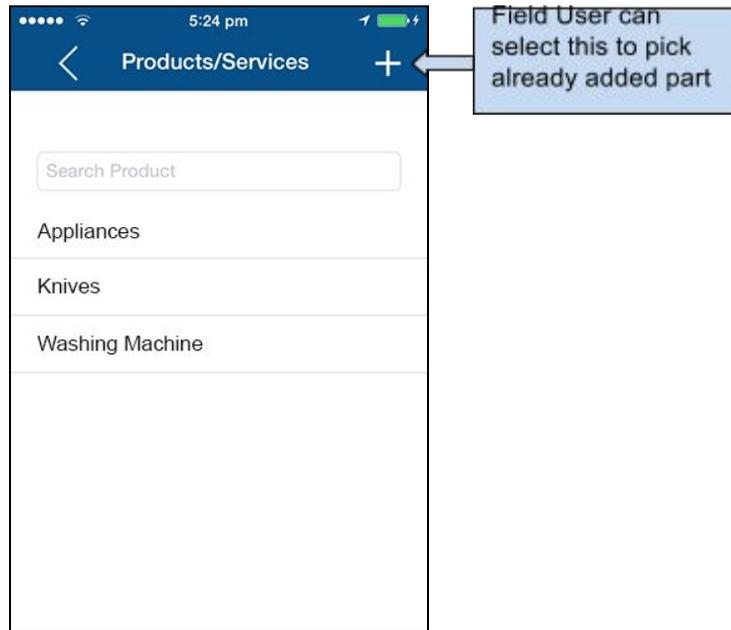
3. Following screen will appear after selecting product/services:



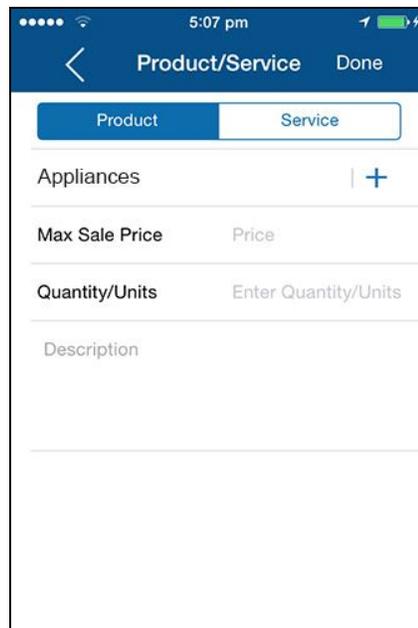
4. Field User will click on Add icon as shown above to add the product/service. Following screen will appear where Field User will get options to add various product/services:



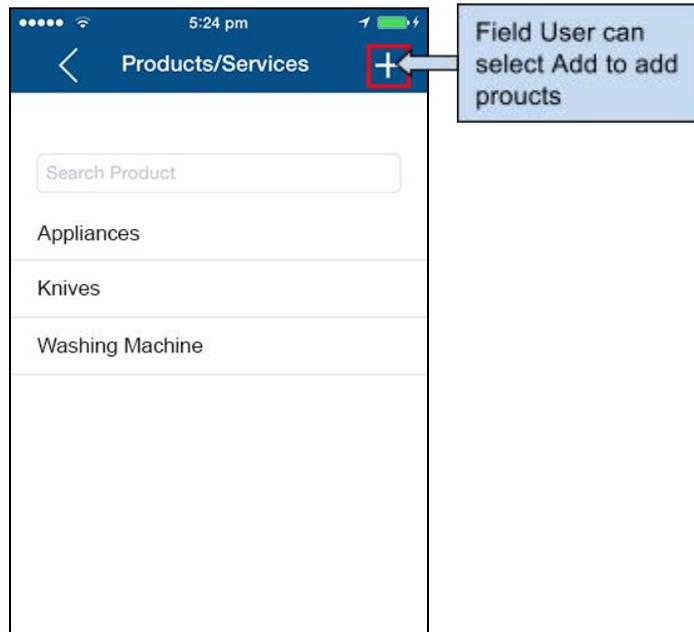
5. Field User will select 'Products' option to add Product for any parts used during the Job. Following screen will appear:



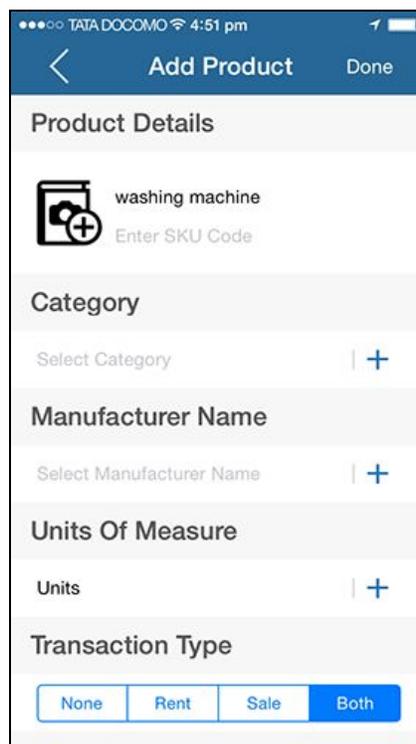
6. Field User can select already added product by selecting search option as shown above. Following screen will appear:



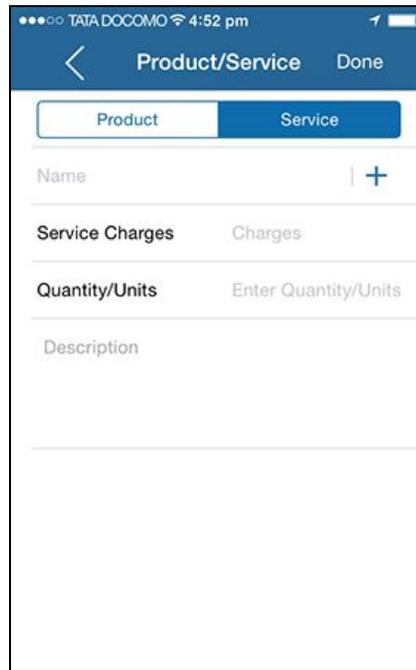
7. Field User can also add a new product if required as shown in the following screen:



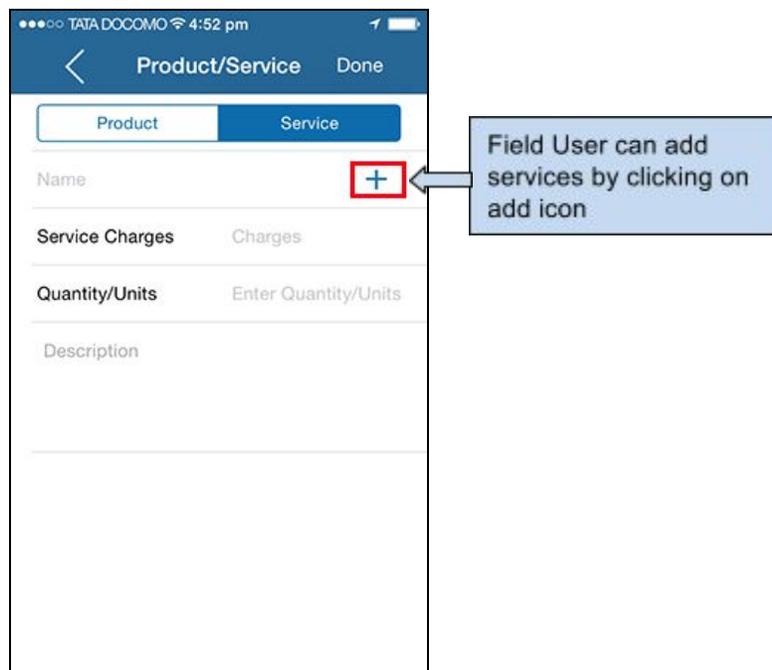
8. After entering information and clicking on Done icon as shown above Product will be added and following screen will appear:



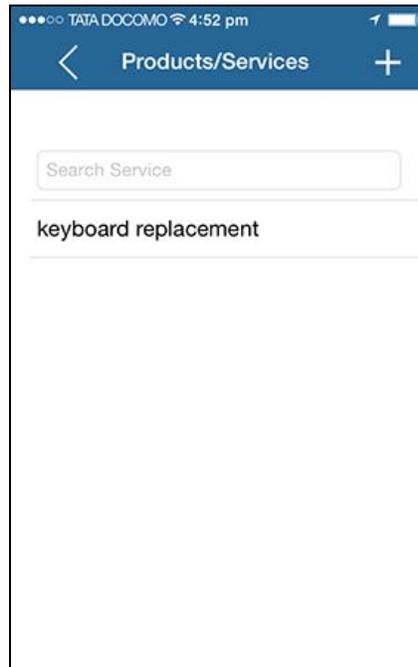
9. In order to add more charges Field User will click on Services. Following screen will appear from where user can select Service option as shown:



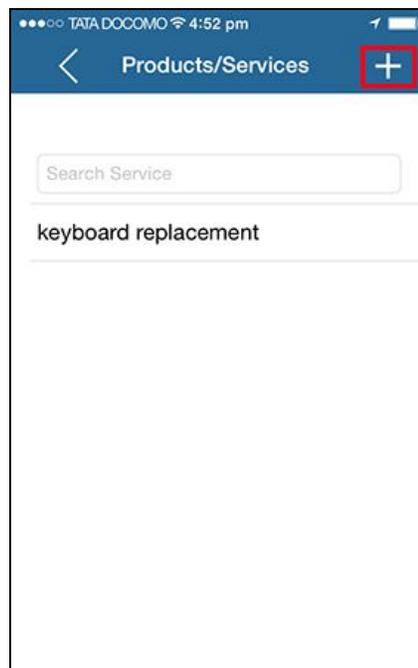
10. After selecting service following screen will appear where Field User can add Service Name:



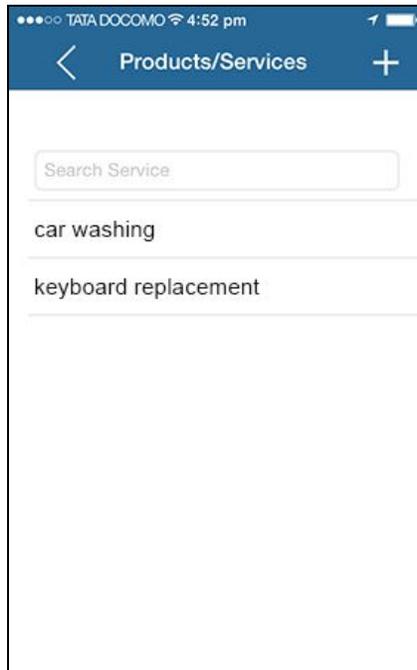
11. Field User can either select already added services or can add new services as shown:



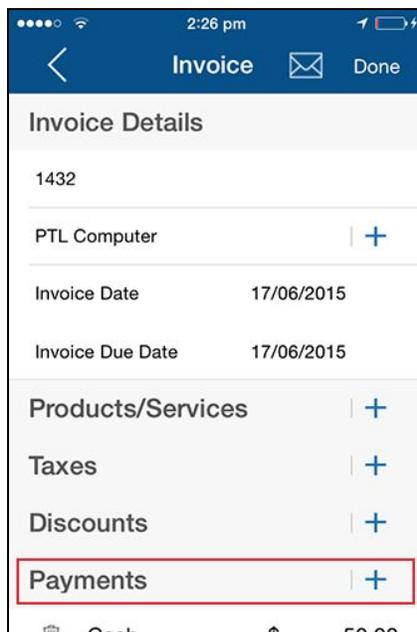
Field User will click on Add icon to add the services.



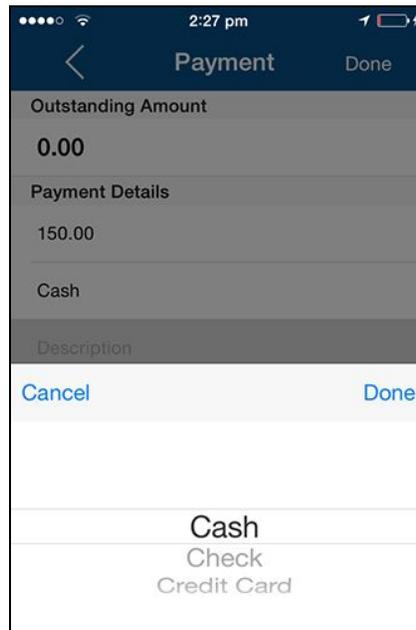
12. Following screen will appear once the services will be added.



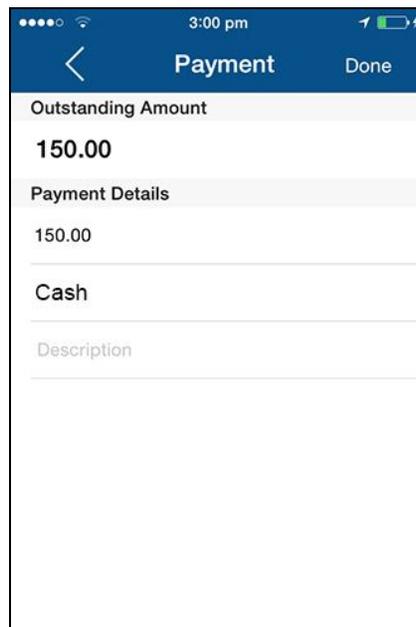
13. Field User can add payment details by clicking on Add icon again. Following screen will appear from where Field User will select Payment option as shown:



14. Following screen will appear where user will enter payment details like amount and payment type. Following screen will appear after selecting payment type:

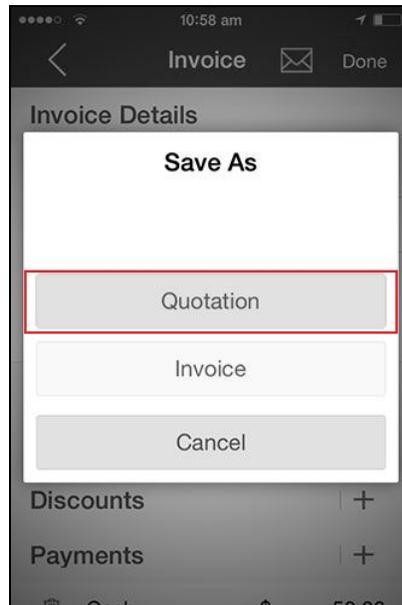


15. After specifying payment type Field User will enter other details and will click on done to add the payment details as shown:

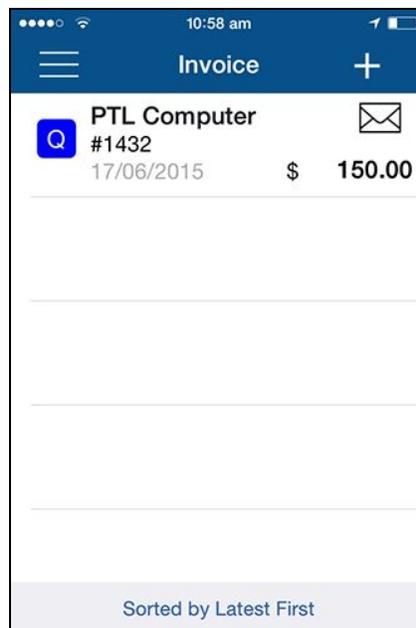


Quotations

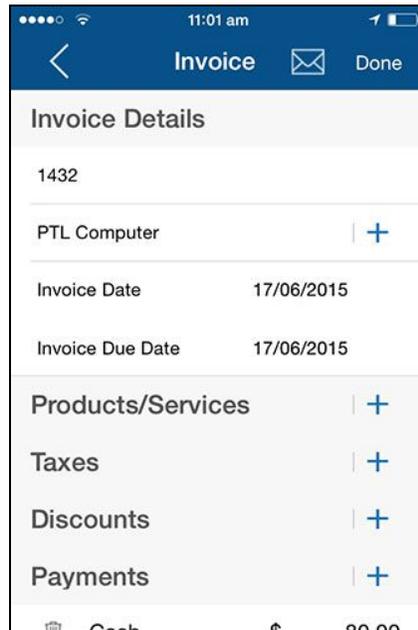
Quotations once created can be viewed in **Quotations** menu as shown:



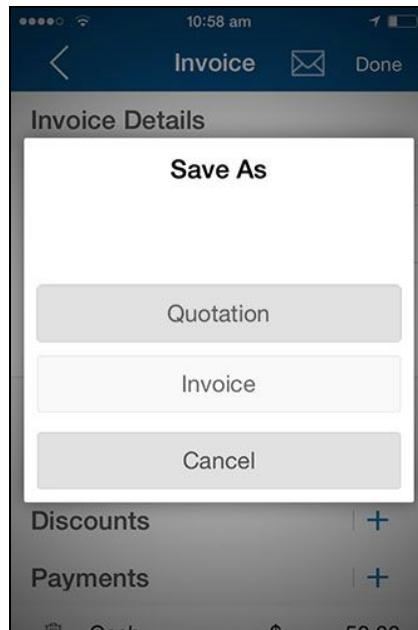
1. Following screen will appear after selecting quotation where user will be able to view all created quotations:



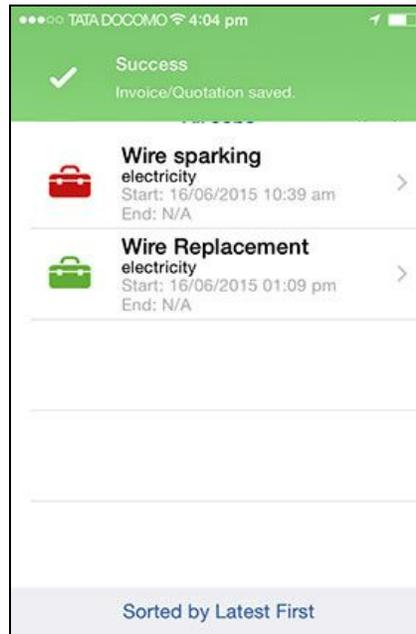
2. Field User will select the quotation to view its details. Following screen will appear:



3. Field User will select product, service and payments and will select **Quotation** button as shown:

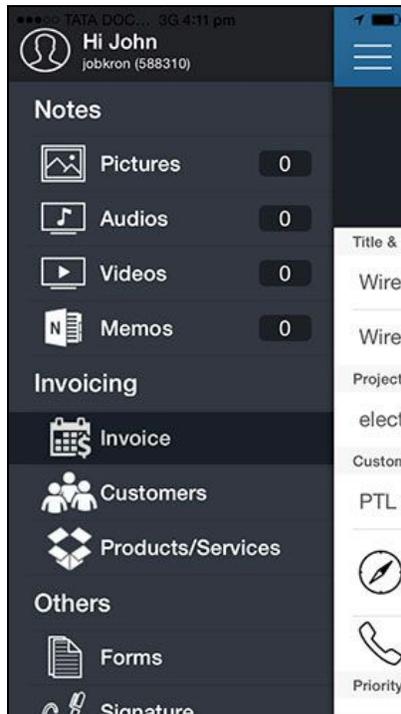


4. Invoice will be created and a confirmation message will appear as shown in the following screen:



Invoices

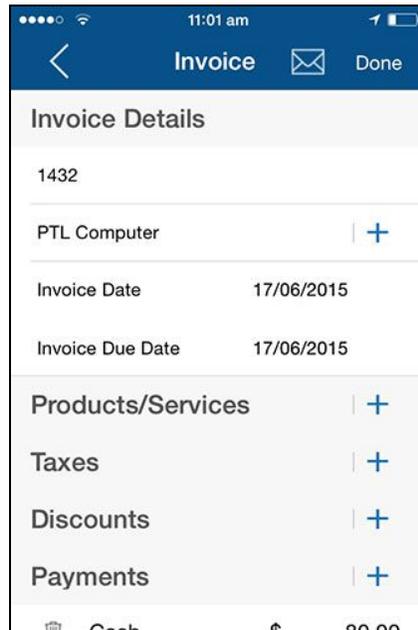
In order to view Invoices Field User will select **Invoices** option from the menu as shown:



1. Following screen will appear after selecting Invoices showing already created invoices:



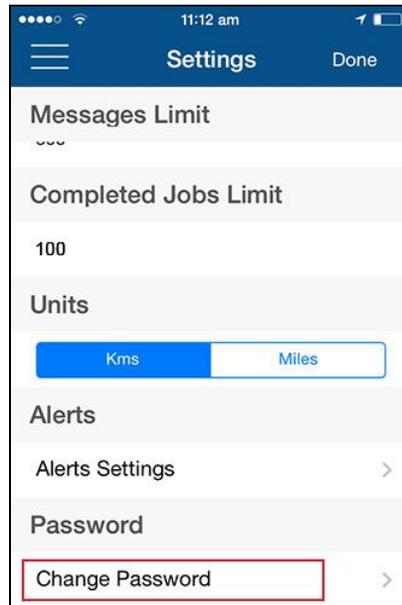
2. Field User will select invoice to view its details. Following screen will appear as shown:



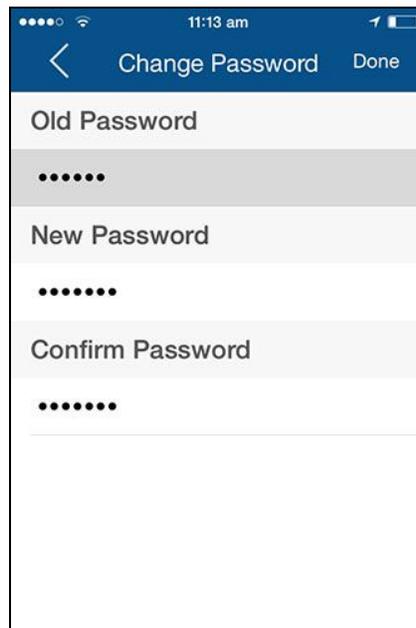
Change Password

This option allows a user to change password. In order to do it, follow the below mentioned steps:

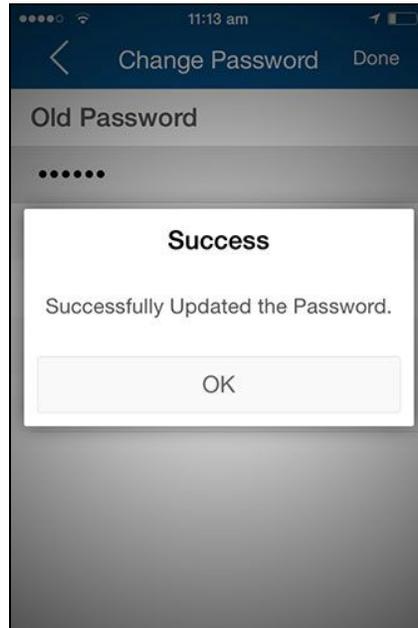
1. From the screen, select **Change Password** option as shown:



2. Change Password screen appears, where user will enter required details to change password:



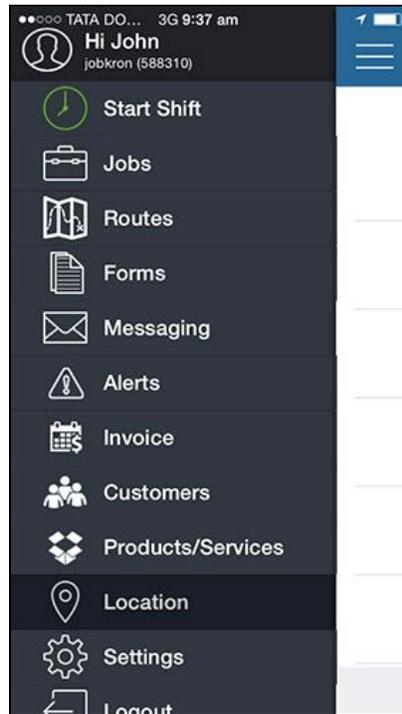
3. User will select **Change** button to save new password. A confirmation message will appear as shown:



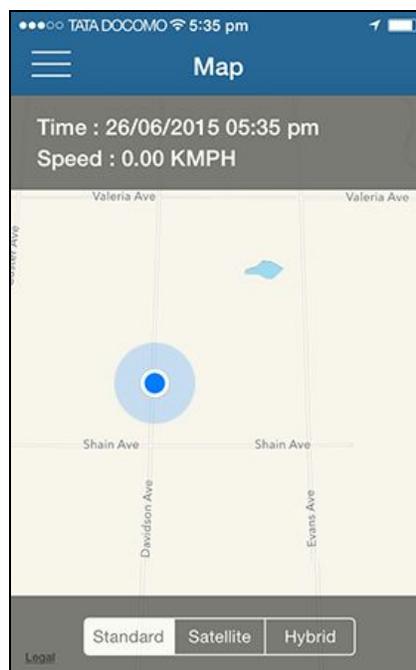
View GPS Location

User can view the details of the last sent GPS data through this option.

1. From the screen, select the **Location** option as shown:

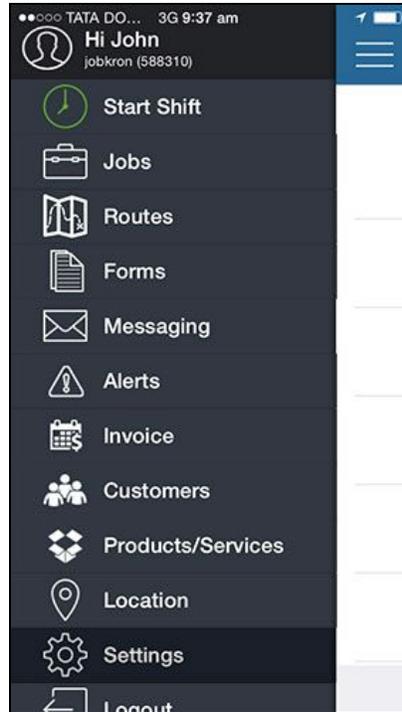


2. Details of last sent GPS data like Latitude, Longitude, GMT Time, Speed and Altitude.

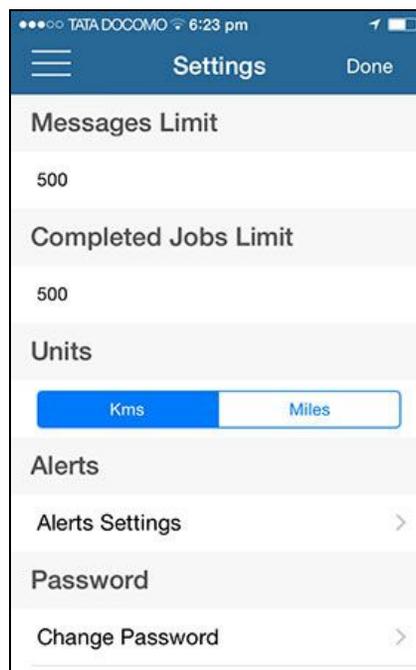


Settings

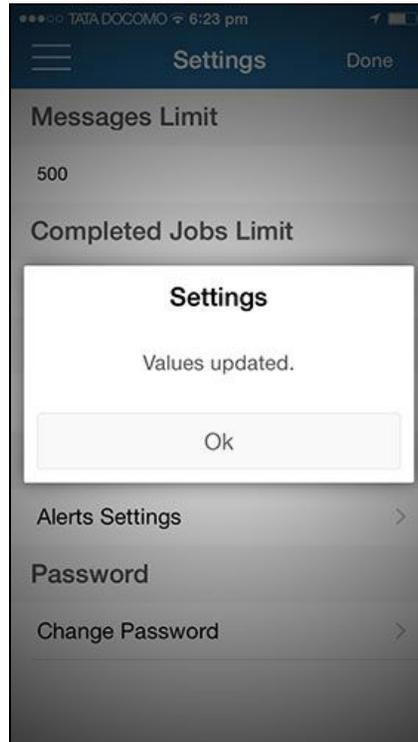
1. **Settings** option allows Field User to update the limit of Jobs, messages and set unit (Either from Km or Miles). In order to use settings user will select **Settings** from menu screen as shown:



2. Settings screen will appear as shown:



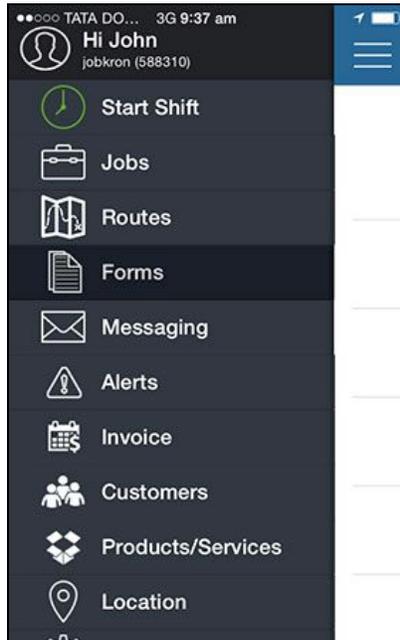
3. After changing the values user will click on **Done** button. Confirmation message will appear as shown:



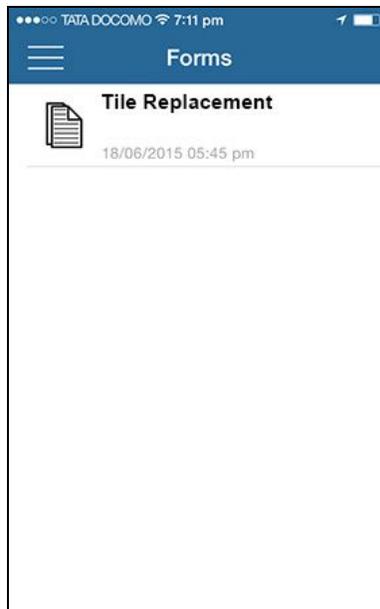
Forms

Forms functionality allows a field employee to input required information at customer's location. Dynamic forms are created by Manager from the website and assigned to specific Field Users based on the requirement. In order to use this feature Field User will follow these steps:

1. From the main menu, select **Forms** as shown:



2. After selecting Forms, Following screen will appear where user will be able to view forms created by Manager from JobsTrac website:



Field User can select desired form from this screen.

3. After selecting the form, following screen will appear:



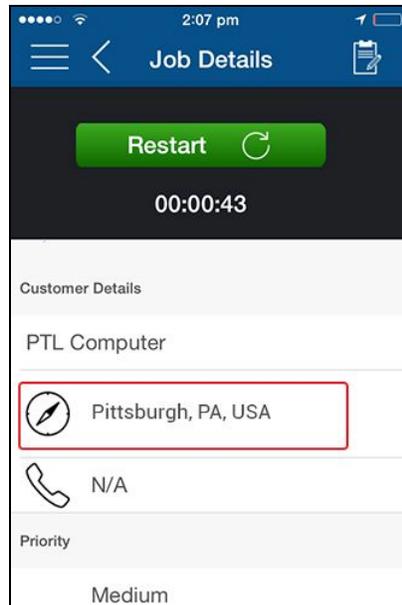
4. Field User will enter details in form and can take signature of customer as shown:



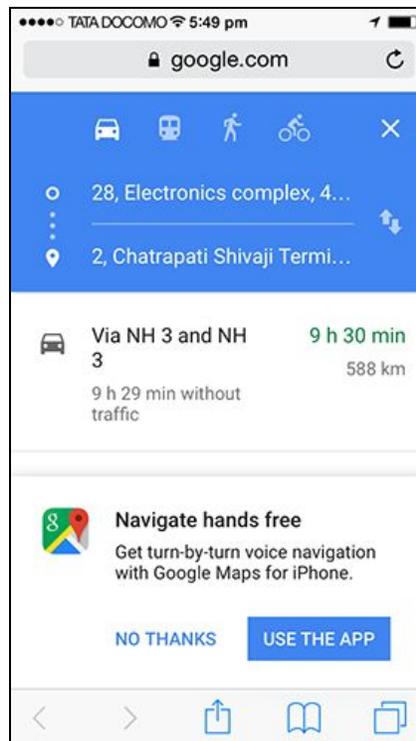
User will click on **Submit** button. Form will be submitted and a confirmation message will appear.

Navigation

1. **Navigation** feature facilitates a Field User to view route details to a customer's location. In order to use this feature user will select **Navigation** from Job menu screen as shown:



2. User will be redirected to navigation screen which will show the directions as shown:



Contact Us

If you need any further assistance regarding JobsTrac please contact us on the details mentioned below:

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