JOBSTRAC

Ver 3.1.4

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Preface

To be successful in field service requires dispatching the right Jobs to the right Employee. Even if you have hundreds or thousands of Jobs to manage and finish every day, you need a solution that understands that. JobsTrac provides a simple, robust way for businesses to track employee location, record shift times, breaks and capture Job / Work Order Information from a GPS-enabled mobile phone.

With JobsTrac, organizations can easily track and record the locations, hours worked and Jobs performed by their field employees. Employees can simply carry their GPS-enabled Android and iPhone with them throughout their regular activities during the day, and their locations are automatically tracked and recorded. When they start and end shifts/Jobs, they enter that information directly through the phone using a simple, one-click interface, and the shift time and location is captured automatically.

JobsTrac is a combination of a Web and Phone Application. This administrative guide helps you to work effectively and efficiently with JobsTrac Web Application.

To know about how to work with JobsTrac Phone Application, please refer JobsTrac – Phone User Guide. This chapter includes the following topics:

About This Guide
Intended Audience
Organization of This Guide
Additional Help

About This Guide

JobsTrac Web User Guide describes the functionalities of JobsTrac Web Application. It describes the modules and features with detailed instructions to perform daily scheduled tasks using the application.

This guide is menu driven and the chapters in this guide represent the individual modules in the application. Operations that can be performed within these modules are described within the respective chapters or sections.

Based on the arrangement set, a web User or a Manager can navigate to different chapters depending upon the requirement.

Intended Audience

The intended audience for this guide is JobsTrac User or Manager.

Organization of This Guide

This guide is organized into the following chapters:

Chapter	Description
JobsTrac - An Overview	Explains the overview of JobsTrac Web Application along with brief introduction to its modules.
Getting Started	Explains the login, logout, home, and common functionality information.
Users Information	Explains about Users involved in the application including how to create, view and edit information about Users.
Customers	Explains about Customers of the application and how to add and edit Customer information.
Landmarks	Explains about the landmarks in the application and how to add, view and edit landmarks.
Tracking	Explains how JobsTrac Web Application can be used to track Field Users. Also include details on how to create and manage Geofence and view journey details of Field Users.
Reports	Explains the common features of reports and lists all available reports in JobsTrac.
Jobs	Explains about how to create, manage, assign and re-assign Jobs to Field Users. This chapter also includes how to attach files and routes while assigning a Job to field User.
Messaging	Explains how to create and exchange messages using JobsTrac Web Application. Also covers how to create and manage custom messages for Field Users.
Forms	Explains how to create and manage Dynamic Forms and Fields. Also include how to attach Dynamic Forms with Jobs and assign them to a Field User.
Invoicing	Explains how a Team Lead / Manager can create Quotations and Invoices using the transactions created by Field Users from their phones.

Additional Help / Technical Support

For any additional help, please contact JobsTrac Support on the details mentioned below:

Toll Free: (+1) 855 493 0081
Technical Support: (+1) 805 504 3742
Sales: (+1) 412 654 1000
Email: info@jobs-trac.com

1. JobsTrac - An Overview

JobsTrac provides a simple, inexpensive way for businesses to track employee locations, record shift times and breaks and capture Job/Work order information from a GPS-enabled Android or iPhone on various networks. JobsTrac connects you with your field workers and offers real-time dispatching of jobs based on users, groups, shift patterns and more. The job planner in JobsTrac lets you arrange jobs however you like. Map helps you find the closest employee nearest to a job location and thus facilitate much better and faster job allocations. With JobsTrac you can get real-time updates on current employee location, job status and pending jobs.

Key features and benefits include:

- Real-time employee tracking
- Improved accuracy in billing
- Manage Customers and Users in an organization
- Create and manage invoice
- Automated alerts
- Exchange messages
- Reduced errors

With complete visibility on your Employees, you will easily be able to schedule field staff effectively for maximum utilization, reduced overtime and better on-time service. JobsTrac helps you make the most of your Investment by facilitating your field staff to receive accurate information in order to service the Customer efficiently. It even lets you create Dynamic Forms and Checklists and allows your field staff to capture job Pictures and Videos.

JobsTrac eliminates the need of cumbersome and time consuming paper based process. You can save valuable time, avoid costly mistakes and prevent manual errors by eliminating paper based process. All captured information can be tracked, managed, viewed, and downloaded in the form of csv files or in the form of reports.

JobsTrac Basic Functionalities

JobsTrac Web Application is intended for User or Manager of an organization. This support features like create and manage Users/Customers, create and assign jobs to field users, create and manage Dynamic Forms, create and manage Quotations/Invoices and many more. JobsTrac supports the following features:

- Users
- Groups
- Customers
- Jobs
- Tracking/Geofencing
- Landmarks
- Quotations/Invoices
- Dynamic Forms
- Messages
- Reports

Users

JobsTrac follows a 4-level User hierarchy. On Sign Up, JobsTrac creates the organization hierarchy and creates an Admin, a Team Lead and a Phone/Field User. An Admin or a Team Lead can create Customers in an organization. Following is the hierarchy of users from top to down based on their roles:

- Administrator
- User / Manager
- Customer
- Phone/Field User

First three user types can access the web interface while only Phone Users (lying at the lowest level in hierarchy) can access the Phone Application. For more information on Users, please refer User Information section.

Groups

Groups feature allows a Manager to:

- Organize field users into Groups.
- Assign/Unassign Users to/from Groups.

For more information on teams and Groups, please see Groups section.

Customers

This section provides details on how JobsTrac Admin or a Team Lead can create and manage Customer in an organization. Only the Admin or Team Lead can add a new Customer and can edit its details. This also covers how a Team Lead or Manager can send details of customer to a field user while assigning a job.

Please refer Customer section for more details on Customers.

Jobs

Jobs are assigned to field users (lowest level in hierarchy) by User / Manager. This also allows a Manager to capture job and Work order information and track real-time status of a job. Job details can be edited if required and can be reassigned to a different field user at any time.

It also provides accurate information about the job, in terms of start and end times, completed or pending. Jobs can be of two types:

- One Time Job.
- Periodic Jobs.

For more information, please refer Job.

Tracking/Geofencing

Tracking allows a Manager to track real-time location of a field user. This section also covers how to view history and journey details of a field user and create and manage Geofences to get alerts if a field user moves out of a set boundary limit. Please refer Tracking section for more details.

Landmarks

Landmarks are special locations that can be displayed on map. JobsTrac Team Lead or Manager can create and view Landmark on map, such as office, Customer location, Job location, and so on. This also allows a Manager to edit a Landmark. For more information on creating and managing Landmarks, please see Landmarks section.

Quotations/Invoices

This section covers how a Team Lead or Manager can create and manage quotation and invoice using JobsTrac Web Application.

For details, please refer Invoicing section.

Dynamic Forms

This covers how Dynamic Forms can be created and attached with a job. Dynamic Form can be assigned to a field user by the Manager specifically suited to a job requirement.

Please refer Forms section for more details.

Messaging

This describes how messages are exchanged between a Team Lead and a field user. Custom Messages can also be assigned to a particular user and can be used on the phone application. Custom Messages can be used for re-sending a same message without the need to type them again.

Messages sent to the field user, can be viewed in the user's inbox on phone (For more insight into Inbox feature of the phone application, please refer JobsTrac Phone User Guide). In simple words, Messaging feature allows a Manager to:

- Send messages to Field User's phone from JobsTrac Web Application.
- Create and manage Custom Messages.

Please refer Messaging for more details.

Reports

This section covers the Reports used in JobsTrac Web Application. Reports give a better visibility to the Manager on the organization operations. Following Reports are available to the Manager:

- User Activity Report
- Job Report
- GPS Report

For more information on reports, please refer Reports section.

2. Getting Started

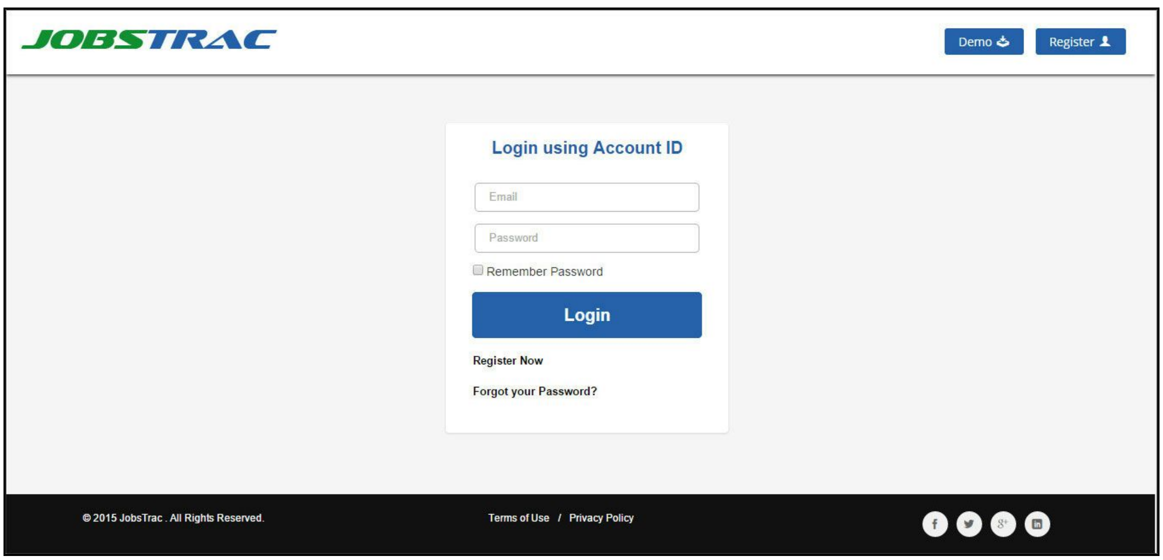
This chapter provides information on how to use JobsTrac Web Application. The application can be accessed using a web browser.

This chapter includes the following sections:

2.1 JobsTrac Login

This section explains how a user can login to JobsTrac Application. To login to the application, follow these steps:

Enter **http://account.jobs-trac.com** in your Internet browser's address bar. **JobsTrac Application Login** page appears as shown:

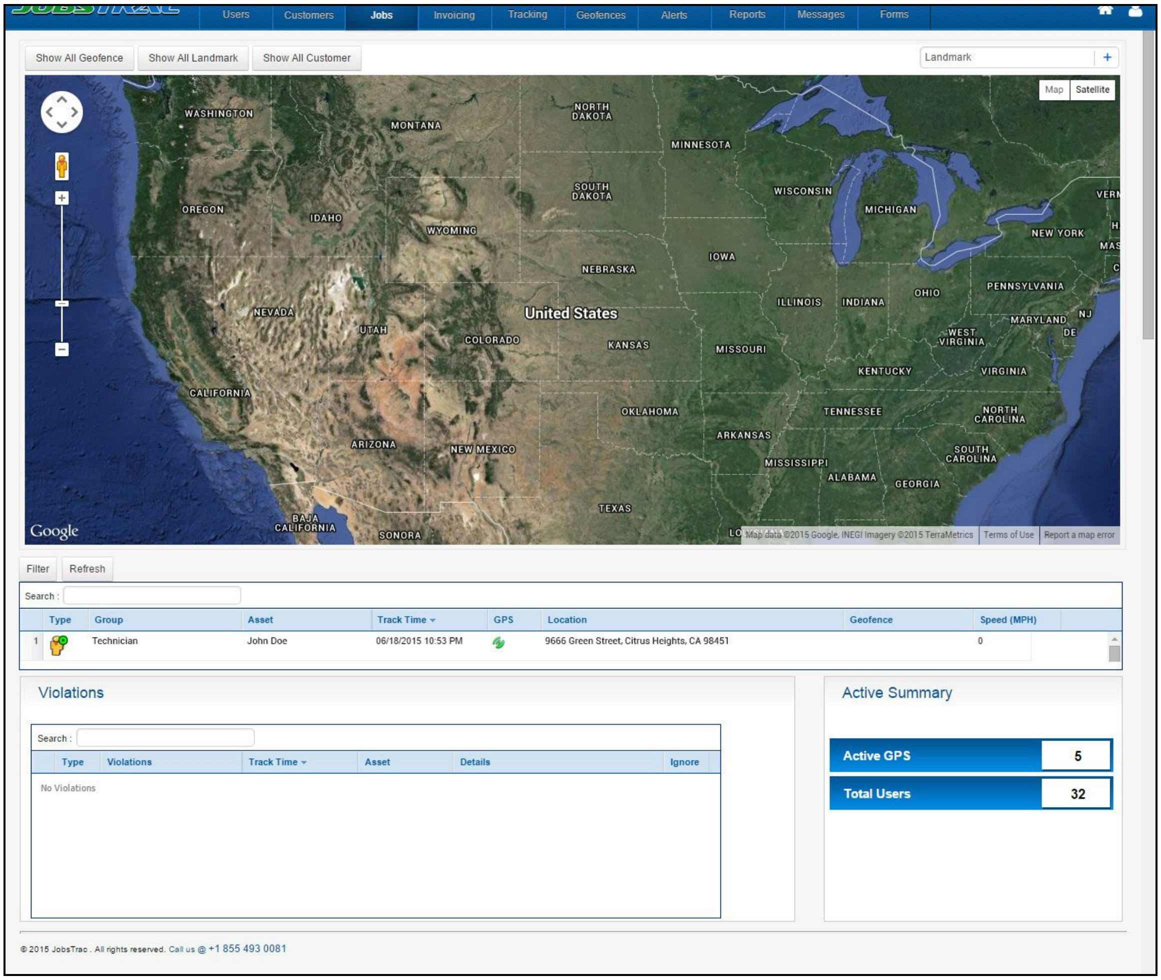


User will enter **Account ID, User Name** and **Password**. Check the Remember Password checkbox if a user wants to remember the password.

Click on **Login** button and JobsTrac **Home** screen appears. Home screen can vary depending on the role of login user.

2.2 JobsTrac Home

Following home screen of JobsTrac Web Application appears once a User / Manager logs in:



2.1.1 User

Functionality (Menu Option)	Associated Features
Add User	Manager can add Field Users.
View Users	View and Edit all Users that are created.
Location Details	View location details of all active Users via Map.
Add Landmark	Add Landmarks with latitude and longitude.
View Landmark	View and Edit all Landmarks in that organization.
Add Job	Create and send Jobs to Field Users in an organization.
Periodic Job	Create and manage reusable Jobs.
View Job	View Jobs that are assigned to Field Users.
View Reports	View Shift, Job and GPS reports.
Add Group	Create Groups and assign/un-assign Users to/from Groups.
View Group	View Groups and Users in that particular Group.
Send Message	Send Messages to Field Users or Groups.
View Messages	View Messages exchanged with Field Users.
Invoicing	Create and manage Quotations and Invoices.
Forms	Create and manage Dynamic Forms.
Tracking	Track Field User's location and manage Geofences.
Password	Change Password.
Personal Info	View and update personal information.
Logout	Logout from the Web Application.

2.1.2 Phone/Field Users

Functionality (Menu Option)	Associated Features
View Jobs	View all Jobs assigned to them.
Add Job	Add a new Job.
Messages	View all received Messages and send Email.
Invoice	Create Quotations and Invoices.
Forms	Use Dynamic Forms from phone.
Notes	Upload audios, videos and images from phone.
Send Location	Send current GPS location.
Password	Change Password.
Personal Info	View and update personal information.
Exit	To exit from phone application.

2.1.3 Customer

Functionality (Menu Option)	Associated Features
View Jobs	View Jobs (Received, rejected, under progress etc).
Password	Change Password.
Personal Info	View and update personal information
Logout	To Logout from the Web Application.

For more information on the menu options, refer the respective chapters in this guide.

2.2 JobsTrac Logout

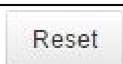
This section helps a Web User or Manager to logout from JobsTrac Web Application. To logout from the application, follow these steps:

Click on the User icon at the right corner of JobsTrac Web Application. Logout button will appear under User icon. Click on it to logout from the Web Application.

2.3 JobsTrac Common Features

This section lists the common icons associated with JobsTrac Web Application.

2.3.1 Common Icons

Icon	Description
	Submit Icon: Click on it to Submit data.
	Reset Icon: Click on it to Reset data.
	Edit Icon: Click on it to edit an item.
	Calendar Icon: Click on it to select the required date.
	Important Icon: Indicates an error Message.
	Left Arrows: Click to navigate back.
	Print: Click to print details
	Export to Excel: Click on it to export details in excel.
	Play: Click on it to play tracking spot

3. User Information

The User Information section helps a User/Manager to manage Users and Groups and do the following:

- View Users and edit their information.
- Assign Field Users to Groups.
- Manage JobsTrac Web Application user access details according to User roles.

JobsTrac provides a simple yet powerful mechanism to manage Users and Groups in an organization. A Group consists of one or more Users. Further, the field user can be assigned/un-assigned to/from a Group.

	Note	An individual user can belong to only one Group in JobsTrac.

The user types are explained in the following table:

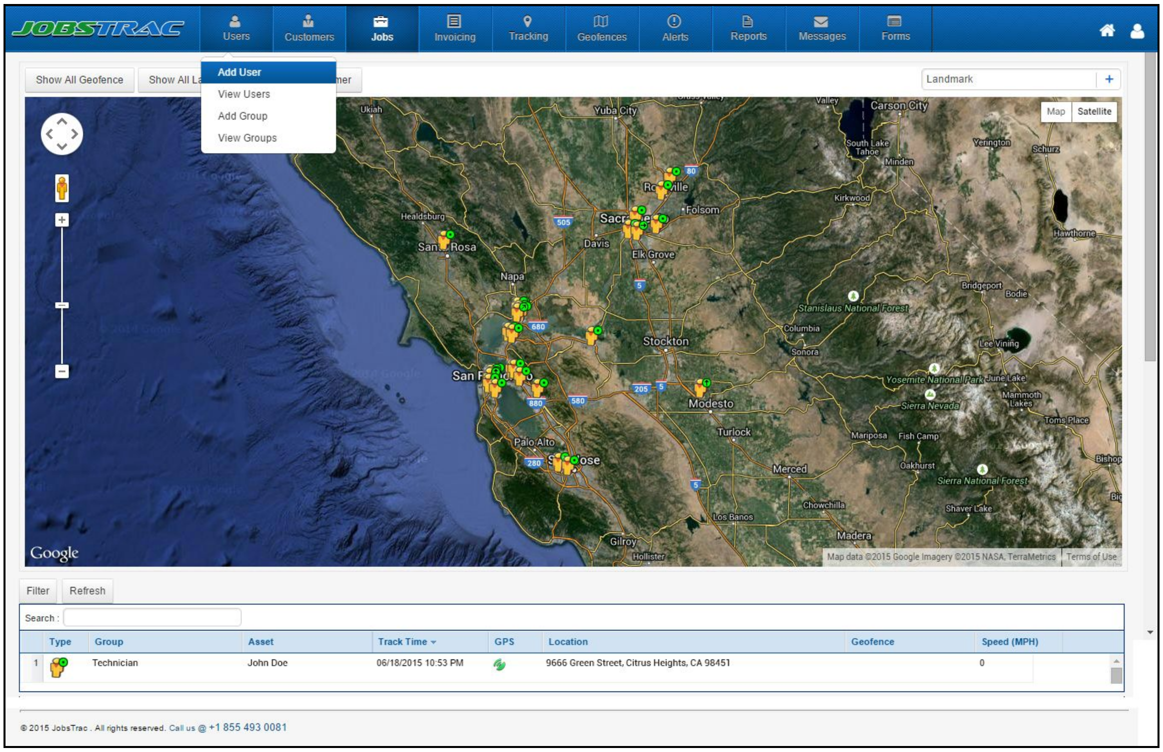
Field	Description
Administrator / Admin	An Admin can create a Team Lead, Field User and a Customer. Admin can also assign field users to Team Lead, manage a Group and can view location of field user on map.
User / Manager	A User/Manager can create Field User or a Customer. User/Manager can send messages, Jobs to Field Users and can view location of Users on map.
Phone Users	These Users can login on phone to receive Jobs, Messages, upload audios, videos, images and record their shift times.
Customer	A Customer can view Job details with their status and manage profile.

Once the field users have been defined, they can start using JobsTrac phone application installed on their devices. For more information, please refer Manage Groups section.

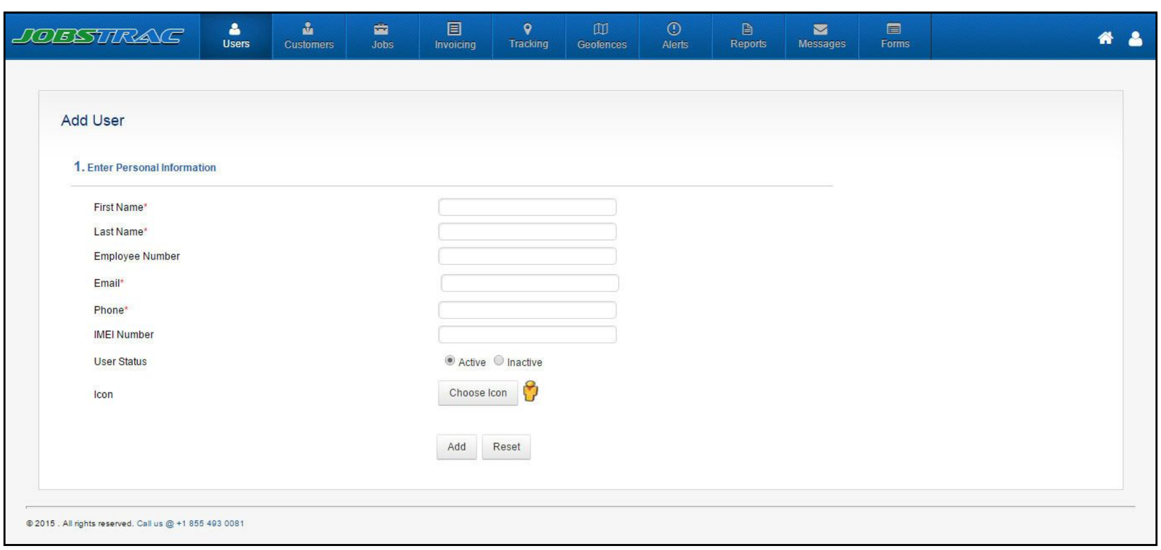
This chapter includes the following sections:

3.1 Add User

User/Manager will be able to add a field user or a Customer. In order to add a field user, User/Manager will select Add User option under Users tab as shown in following screen:



Add Users screen will appear as shown:



Manager will enter required details to create a Field User and will click on **Create User** button. A confirmation message will appear on the top of screen and Field User will be created.

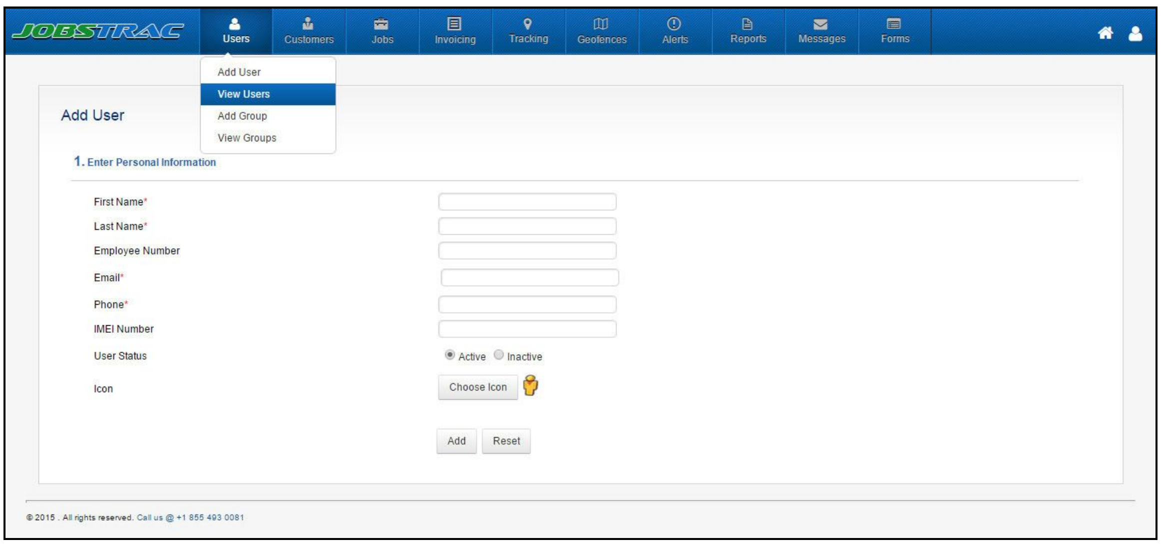
3.2 View / Edit Users

In JobsTrac, Manager can view the list of Field Users along with other details from **View/Edit Users** feature. This feature also allows a Manager to edit and activate/inactivate Users.

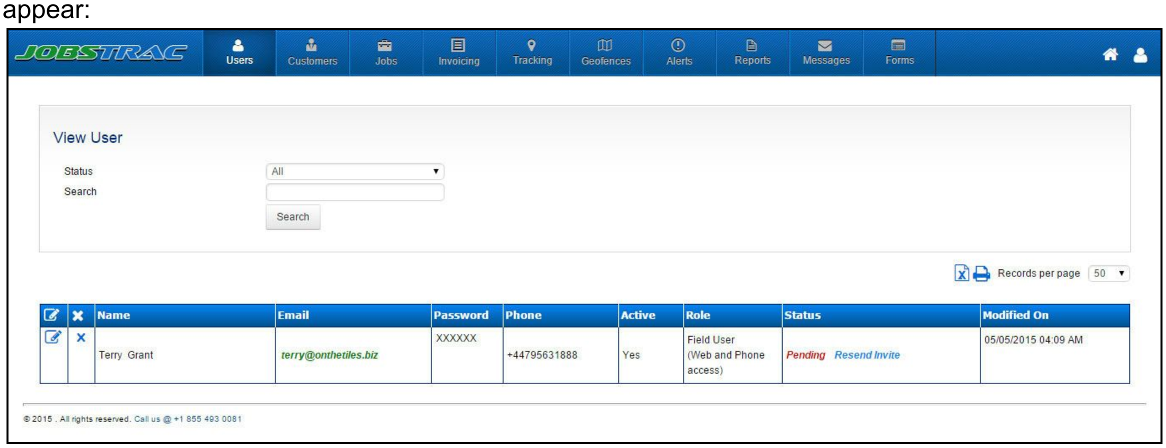
View Users

To view the list of Field Users, follow these steps:

Manager will select **View Users** option under the Users menu as shown.



Manager will click on **View Users** from the above screen to view user details. Following screen will appear:

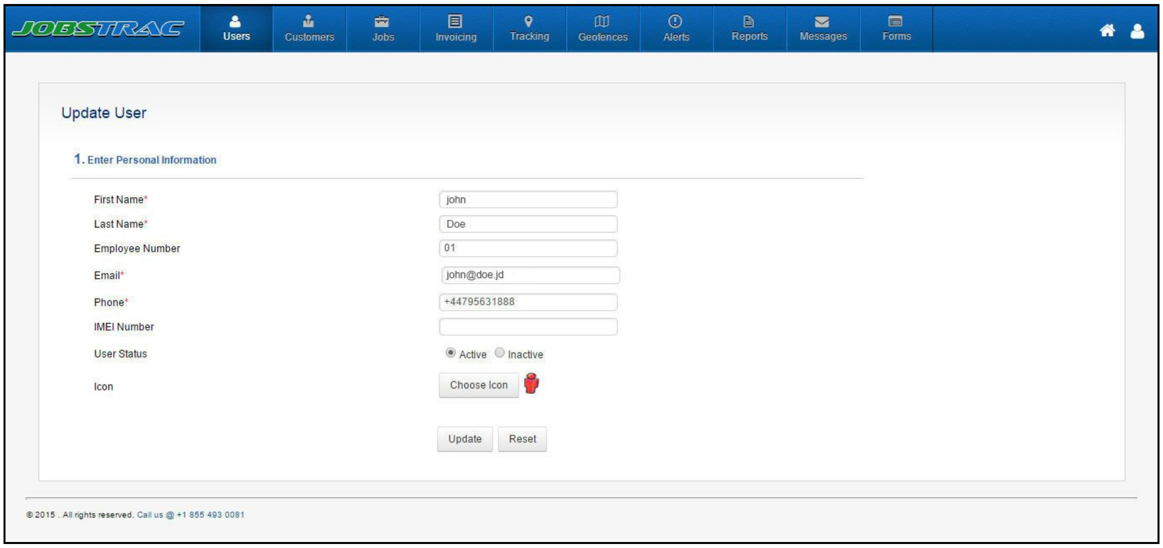


Manager can narrow down the search (View Active/Inactive Users) by selecting Status from the dropdown. Following operations can be performed from this screen:

- Edit Users
- Activate/Inactivate Users

Edit Users

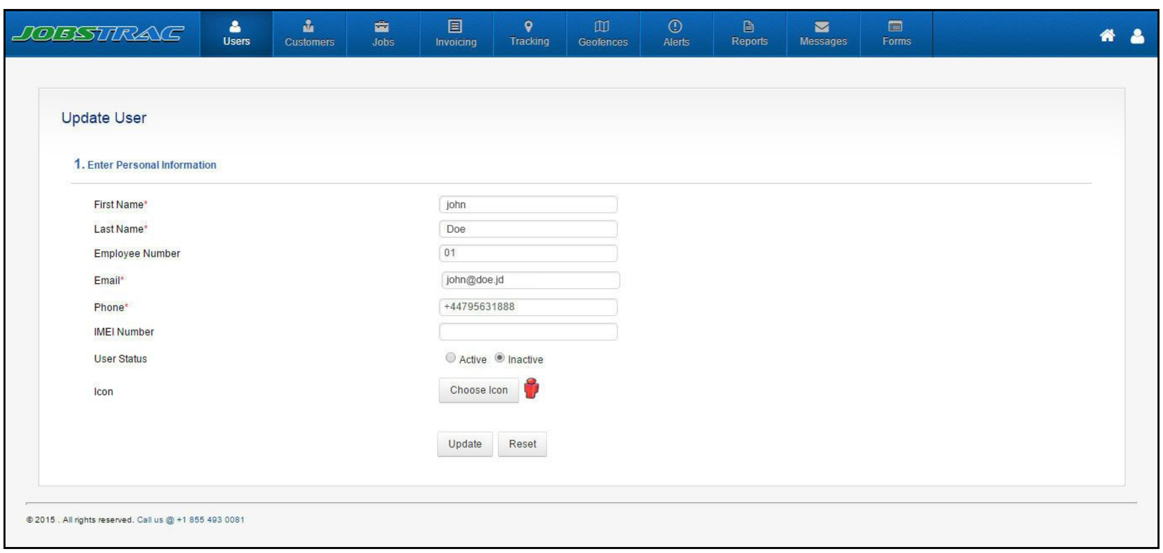
To edit user details, click on the edit icon. The **Edit User** screen appears as shown:



Manager will make necessary edits and click on the **Save** icon. Information will be saved and a confirmation message will appear.

Activate/Inactivate Users

Active radio button will be selected by default. In order to inactivate user, Manager will select Inactive radio button as shown below:



Manager will click on **Update User** to update the details. A confirmation message will appear.

4. Groups

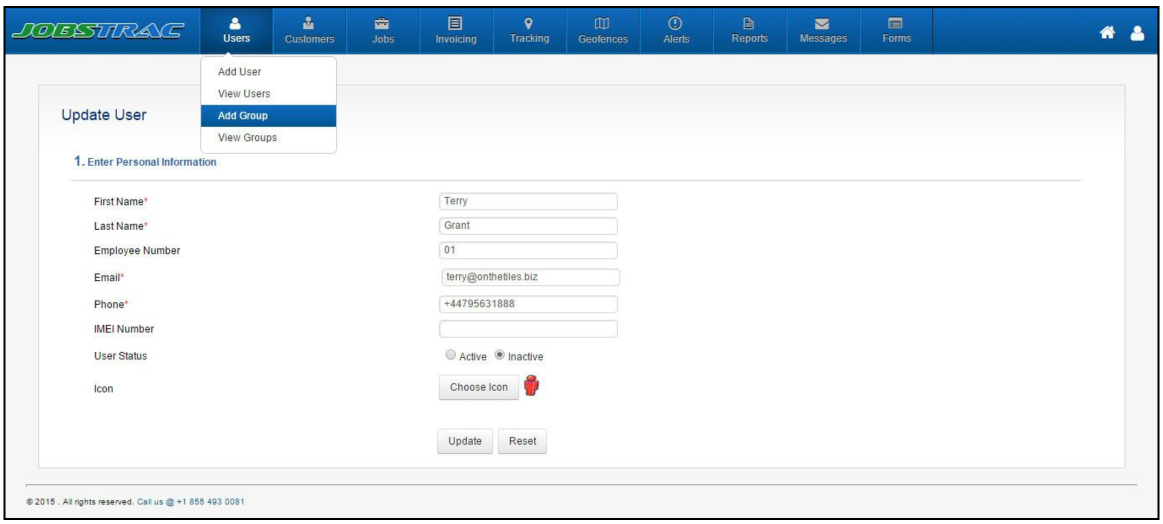
Groups section helps to add and view/edit Groups. A Group can consist of one or more Field Users.

Manager can perform following operations under Groups section:

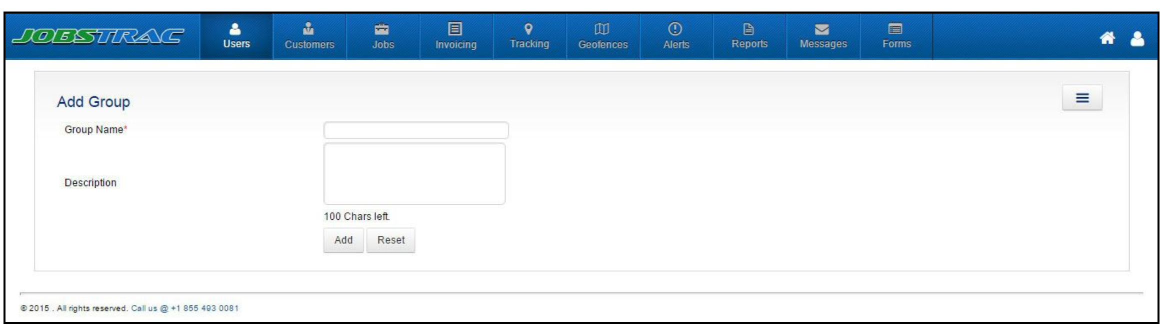
[Add Group](#)
[View Group](#)
[Edit Group](#)

4.1 Add Group

To add a Group, Manager will click on **Add Group** under Users menu as shown:



Add Group screen will appear as shown:



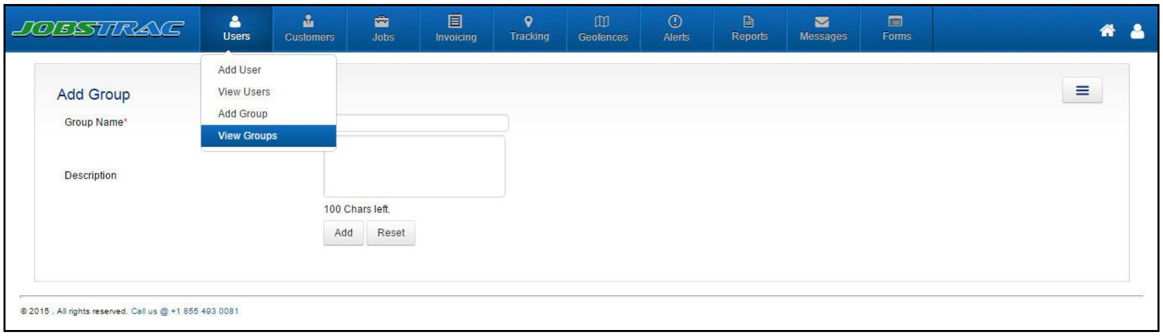
Do the required actions for the following fields:

Field	Description
Group Name	Enter a unique name for the Group
Description	Enter description about Group

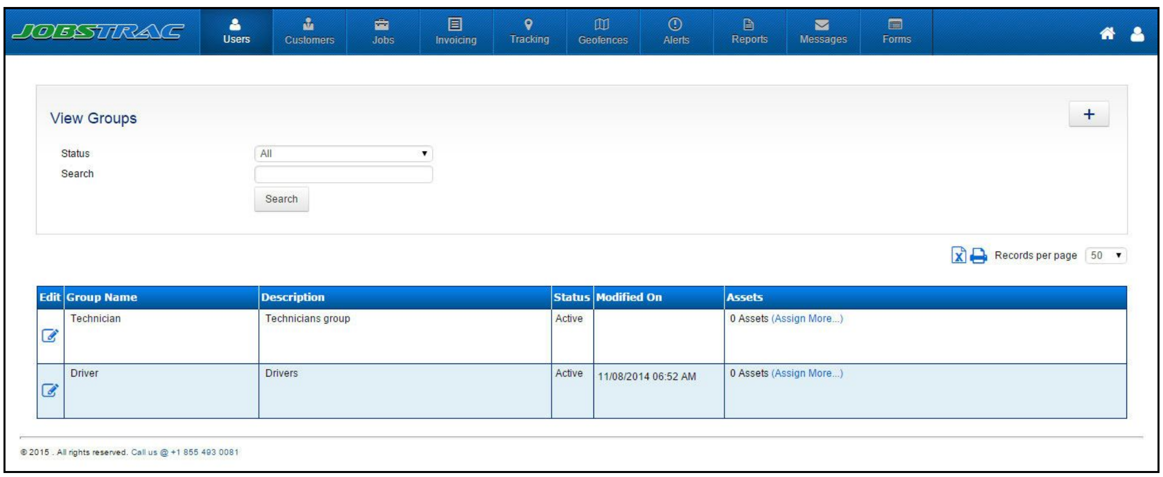
Click on the **Create** button. The **Group** will be created and a confirmation message will appear.

4.2 View / Edit Groups

To view Groups, Manager will click on **View Groups** under Users menu as shown:

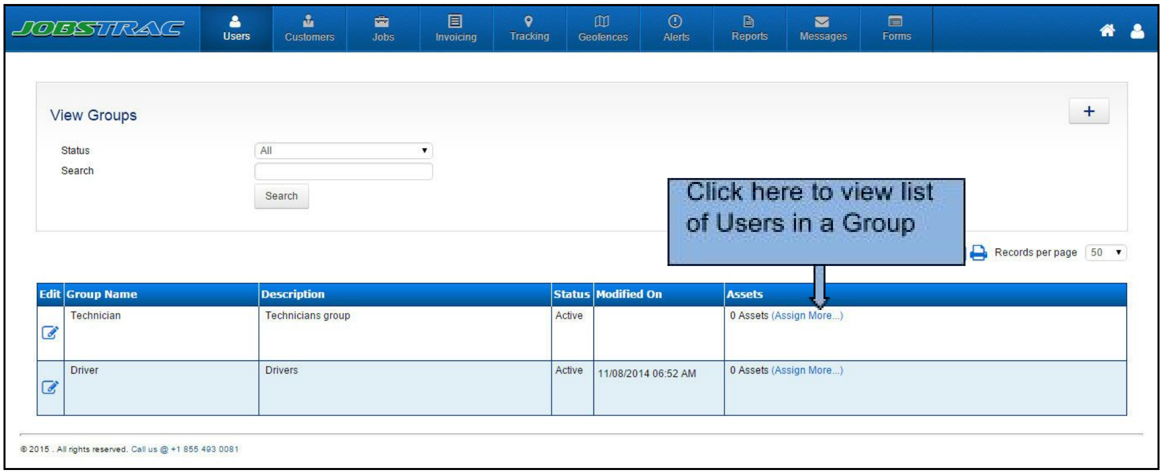


The View Groups screen appears as shown:



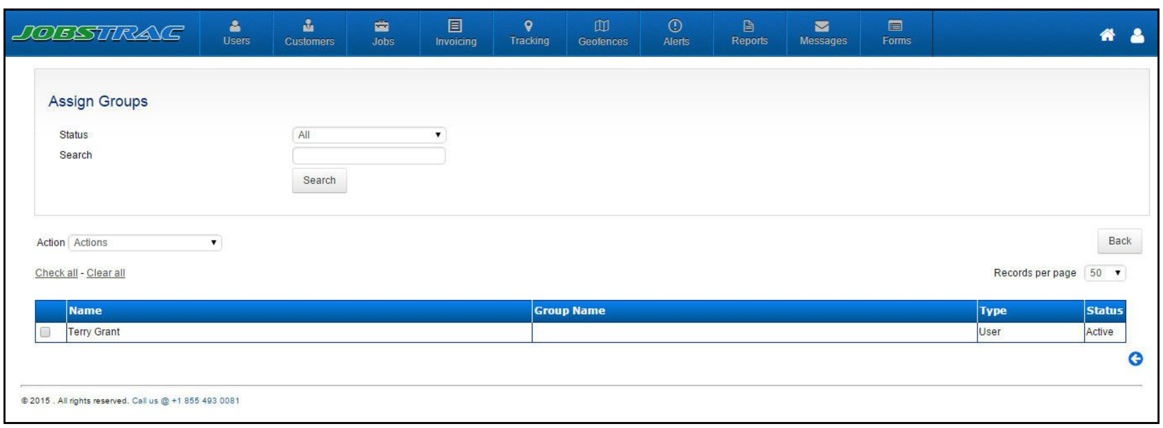
This screen shows a list of all the existing Groups. Manager can filter the search by selecting status from Status dropdown. Manager can also edit a Group from this screen.

To edit a Group Manager will click on Icon to edit Group details or activate/inactivate it as shown in the following screen:

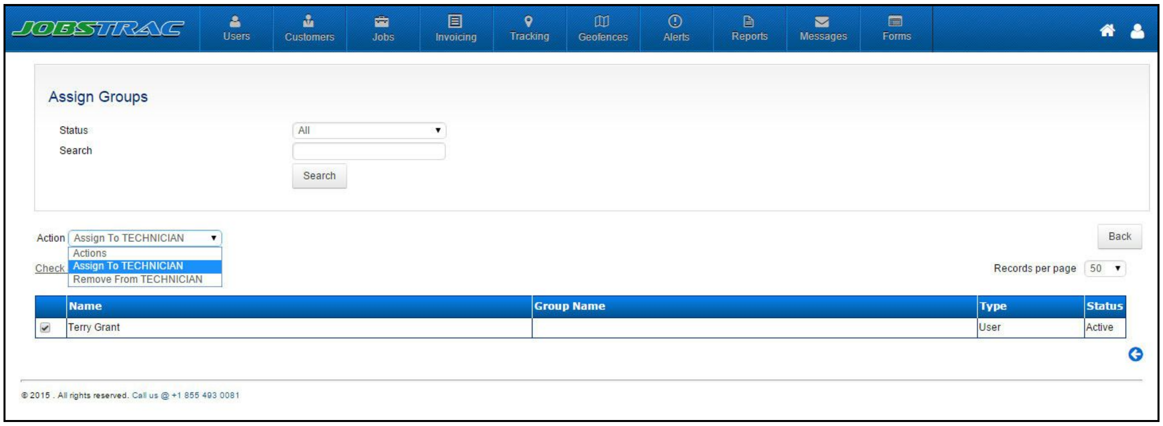


Manager will edit the required information and then click **Save** Icon.

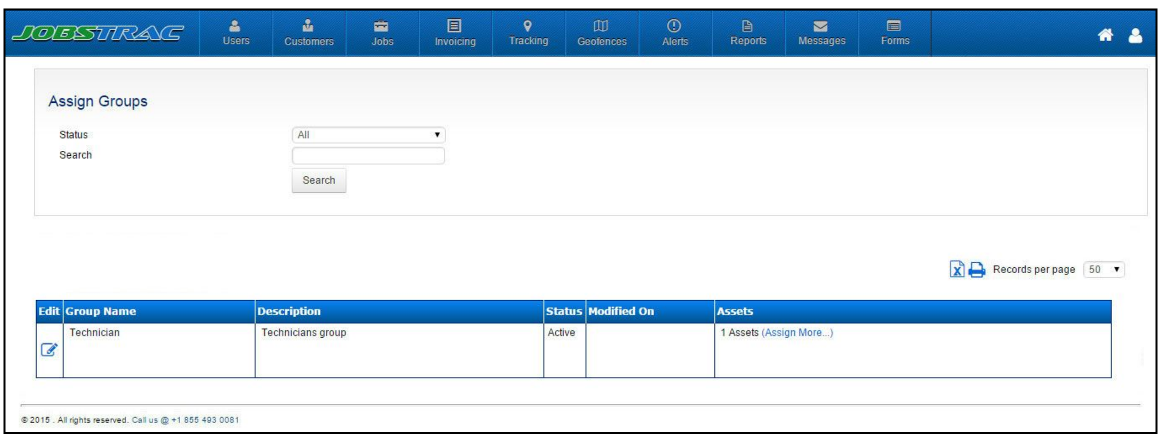
Manager can click on User link under User Count column to assign Users in selected Group. After clicking on Users link following screen will appear showing all Users in organization:



By checking checkbox against user names and selecting actions from **Actions** dropdown Manager can assign a user in the Group as shown:



After selecting **Assign to Group Name** the selected user will be assigned to the Group and will show up in view Groups screen as shown:



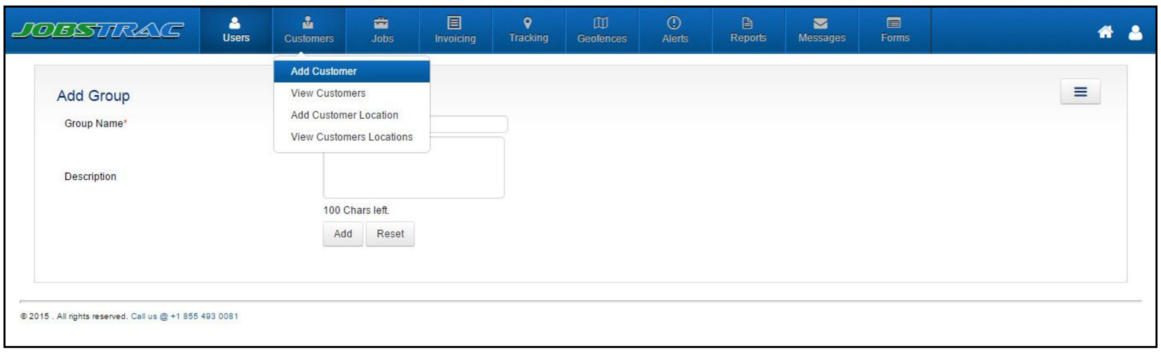
Similarly Manager can un-assign a user from the Group by selecting Remove from option in Action dropdown.

5. Customer

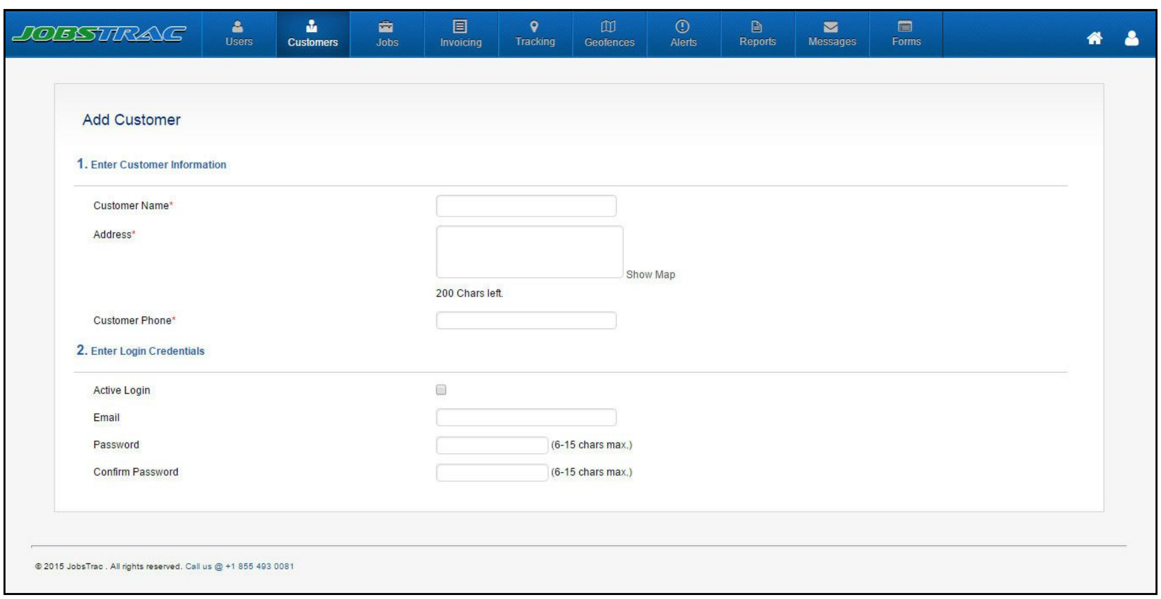
Customer section allows Manager to create and manage Customers in an organization. Following options are available under Customers.

5.1 Add Customer

In order to add a Customer, Manager will click on **Add Customer** option from Customers menu as shown:



On the add Customer screen, Manager will enter necessary details and click on **Create Customer** button, Customer will be added and a confirmation message will appear:



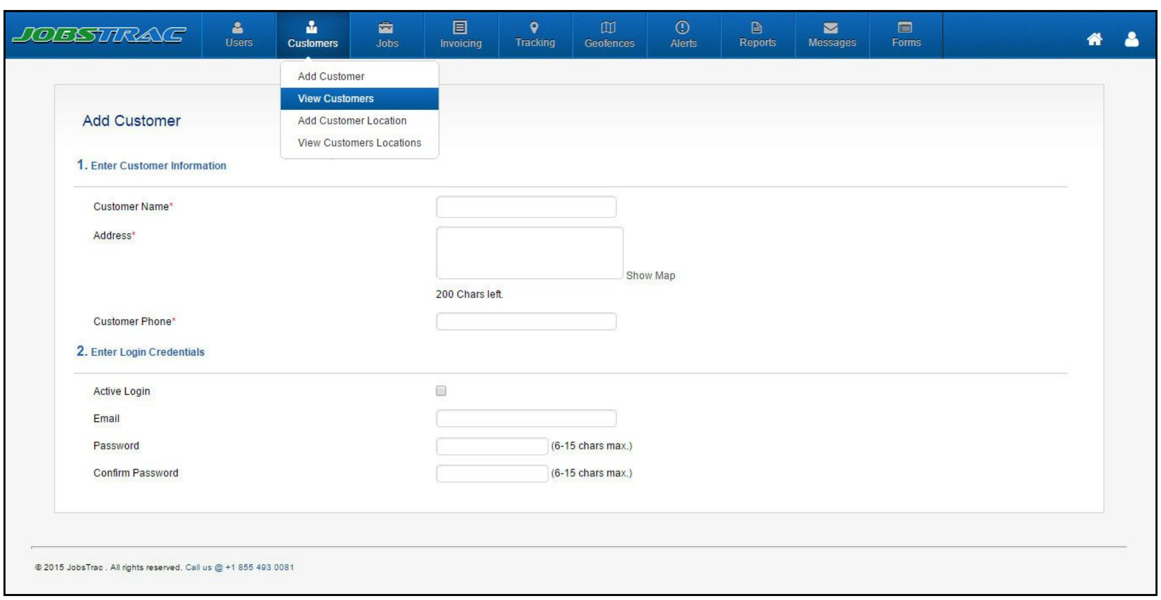
Note: If Manager provides Login access (Username and Password) to a Customer, the Customer can be setup to use JobsTrac Web Application. A simple Customer will be created if in case no login access is provided. This simple Customer can be upgraded in future to use the JobsTrac Web Application by simply providing the login access.

Manager can enter details for the following fields on add Customer screen:

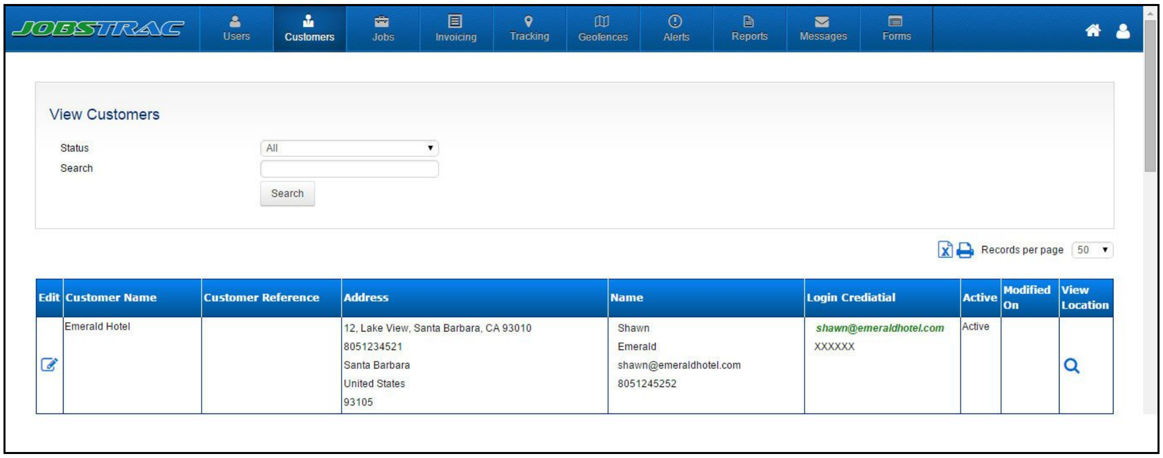
Field	Description
Customer Information	
Company Name	Enter Company Name.
Address	Enter address for company or corporation.
Company Phone	Enter phone for company.
Login Information	
Username	Enter username for Customer.
Password	Enter password of Customer.
Confirm Password	Re-Enter password of Customer for confirmation.
Primary Contact	
First Name	First name of person to contact in that organization.
Last Name	Enter Last-Name of person to contact.
Email	Enter Email for the same.
Phone	Enter Phone for the same.
Status	Choose whether organization is active or inactive.

5.2 View / Edit Customer

The **View / Edit Customer** feature shows list of Customers and allows editing details of a desired Customer. To view or edit a Customer, from the Customers menu, Manager will click **View Customers** as shown:

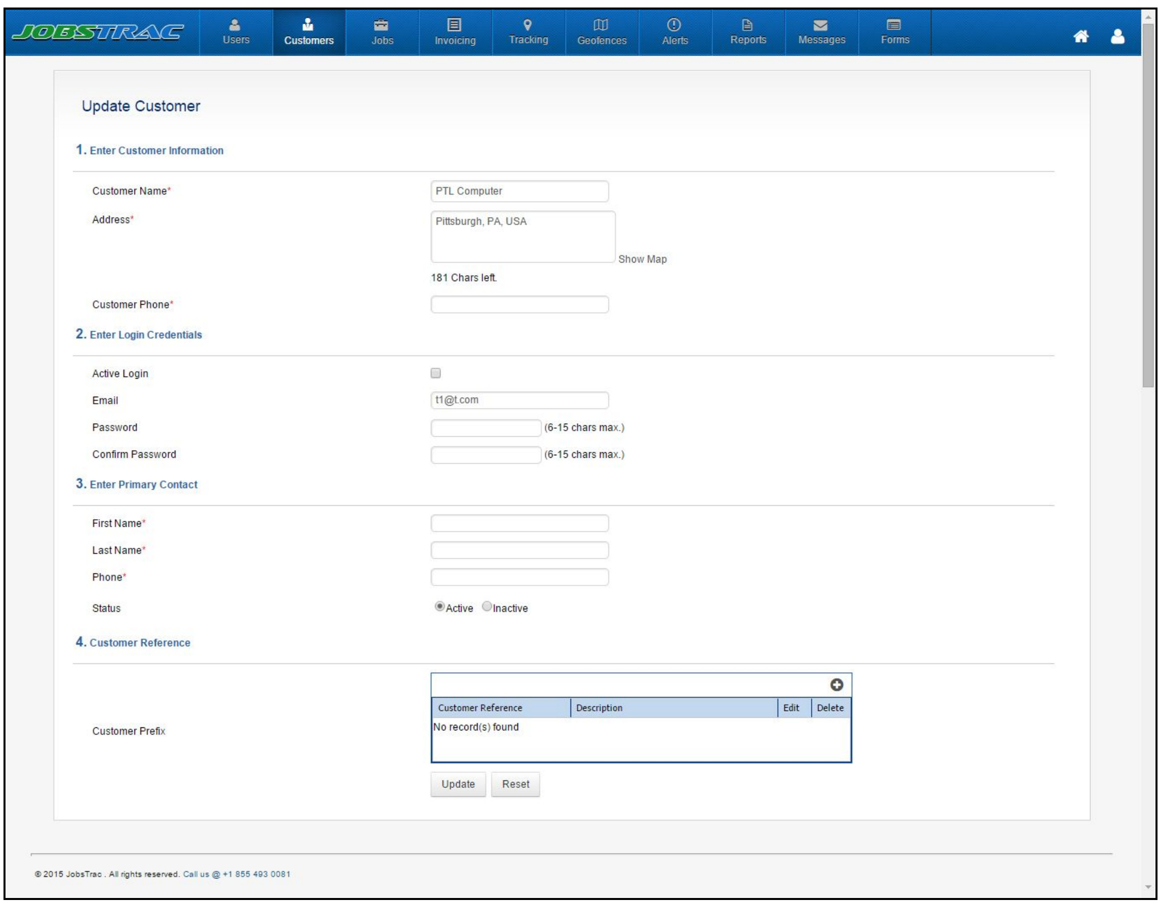


View Customers screen appears as shown:



Edit Customer

To edit a Customer, Manager will click on icon. Edit Customer screen will appear:



Manager will update required information and in order to save changes Manager will click on **Update Customer** button and a confirmation message will appear.

Activate Customer

Activate radio button will be selected by default showing that Customer is active currently.

De-activate Customer

In order to inactivate a Customer, Manager will select Inactive radio button. Customer will become inactive and the **Status** of Customer will appear as '**Inactive'**.

6. Job

Job feature facilitate a Manager to capture Job and Work Order information for all Field Users. In addition, due to last minute changes, the Job details can also be edited. Jobs can be created and assigned to the Field User along with attachments and forms depending on the Job requirement.

Further, this feature helps in reducing paperwork related to a Job thus reducing manual errors. It also provides accurate information about the Job along with:

- Start and End times of a Job.
- Current status of a Job.
- Start and End times for Always Available/Periodic Job.

These are also phrased as Job variations in JobsTrac. The segregation applied is useful as it allows Manager to collect Job Information in the desired manner. The Job types available are as follows:

One Time Job

This is useful when the exact time taken to complete a Job is required to be captured.

Always-Available/Periodic Job

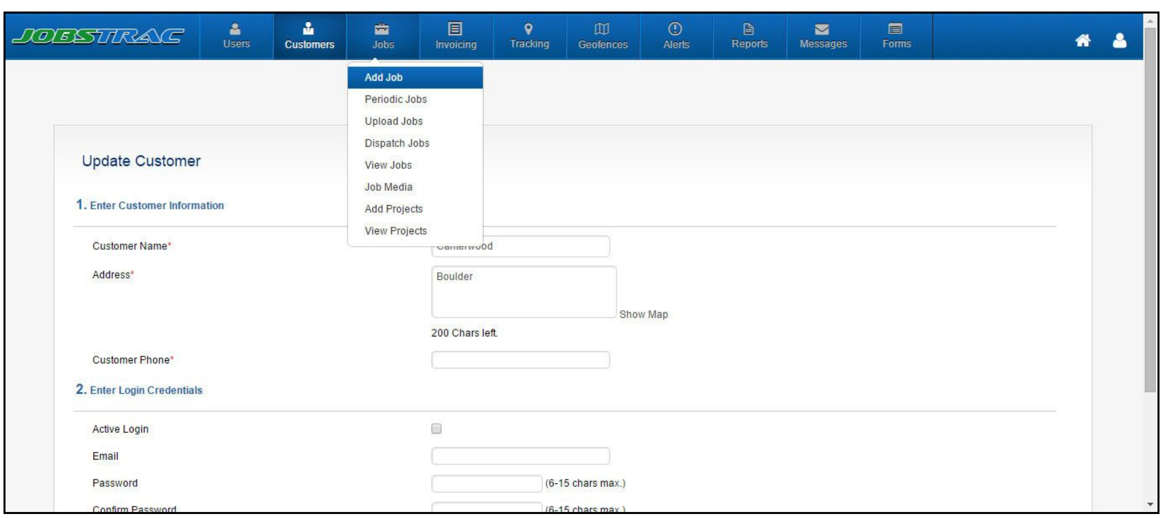
These types of Jobs are available for specific time period and repeats periodically.

This section includes the following sub sections:

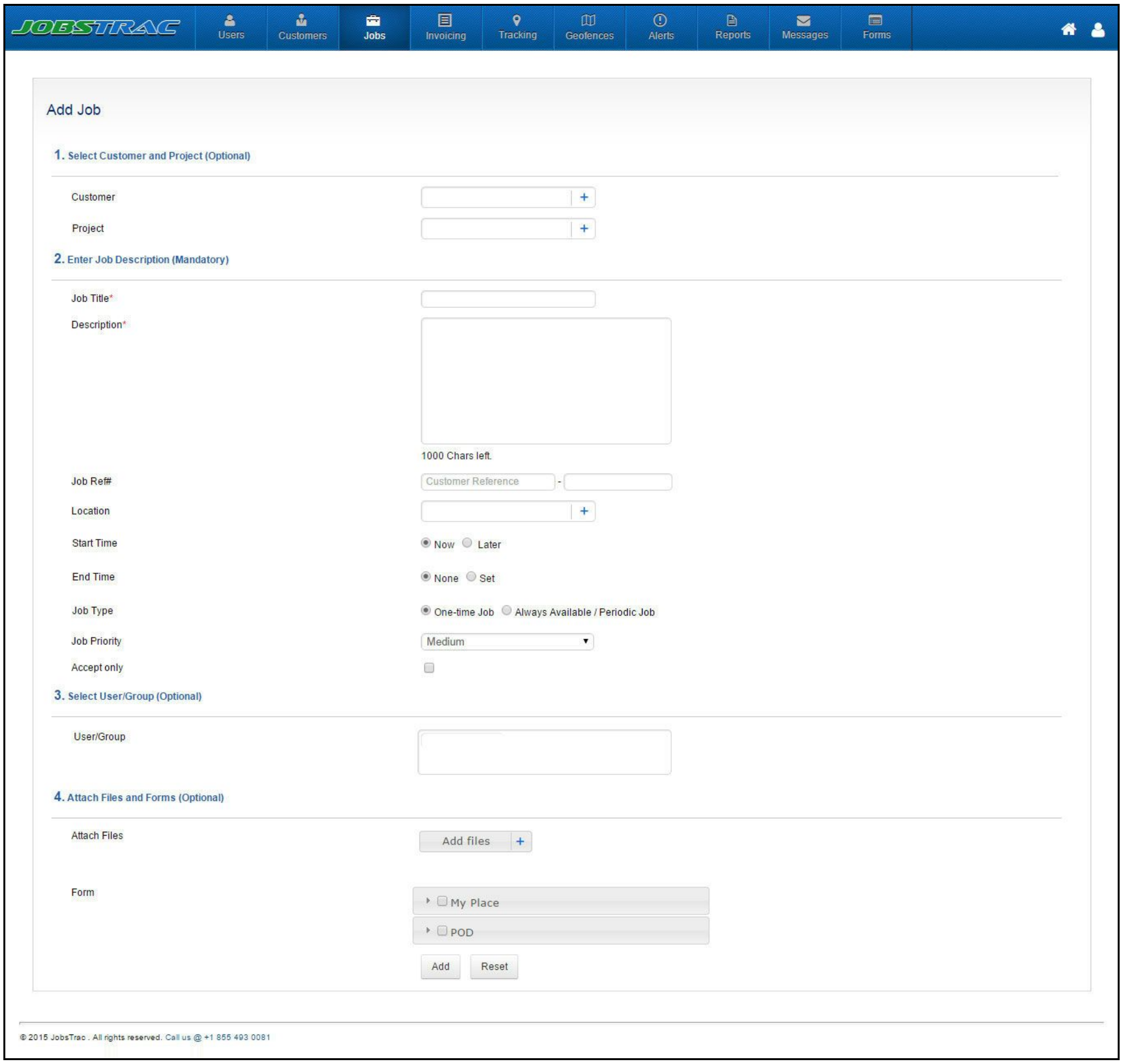
Add Job
View/Edit Job
Periodic Job

6.1 Add Job

Manager can create Jobs from JobsTrac web application. The **Add Job** section helps to enter Job details. To create a Job from the Jobs menu, click **Add Job** as shown:



Add Job screen appears as shown:



On the mobile, Manager can also view details on how the Job will be displayed to Field User.

Manager will do the required actions for the following fields:

Fields	Description
Customer	Select Customer for which this Job needs to be created.
Select Project	Select a project name.
Select User / Group	Select Username from dropdown whom to assign Job.
Job Title	Enter Job title.
Description	Enter the detailed description about Job.
Start Time	Enter the Job start time.
End Time	Enter the Job end time.
Job Type	Select the required fields, as One time Job or Periodic Job.
Job Priority	Select Job priority from dropdown list.
Accept Only	Select this if Manager needs does not want a Field User to reject this Job.
Attach Files	Attach files with Job information if required.
Form	This gives an option to link dynamic form with a Job.

After entering the details Manager will click on **Create Job** button. In order to create Always Available/Periodic Job, Manager will select **Always Available/Periodic Job** radio button.

For Periodic Job all above information are same except two new fields as shown:

Fields	Description
Job Available From Time	Enter the Job Available Start Time
Job Available Until Time	Enter the Job Available End Time

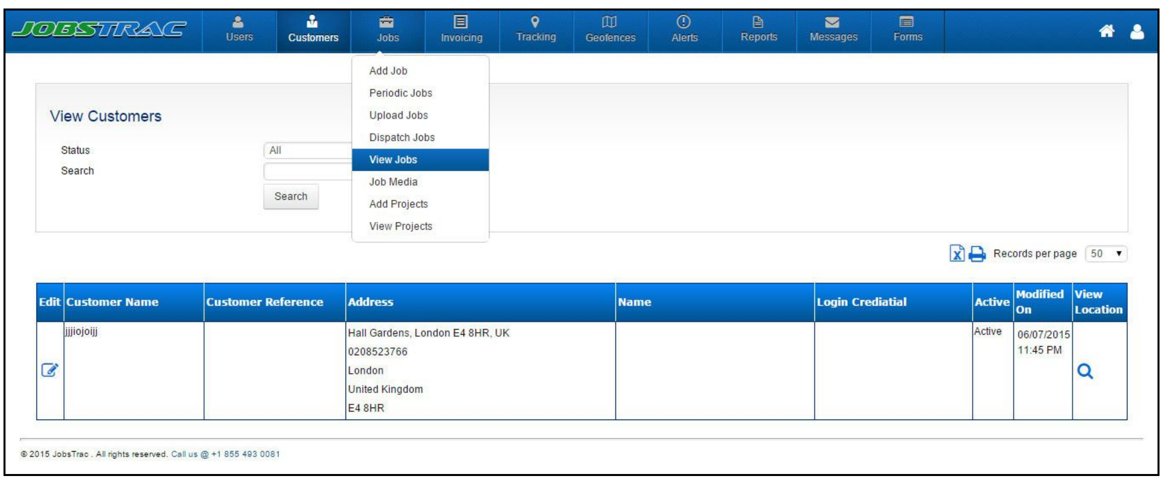
This will allow Manager to set the start and end date for which the Job will be available to the Field User.

6.2 View / Edit Job

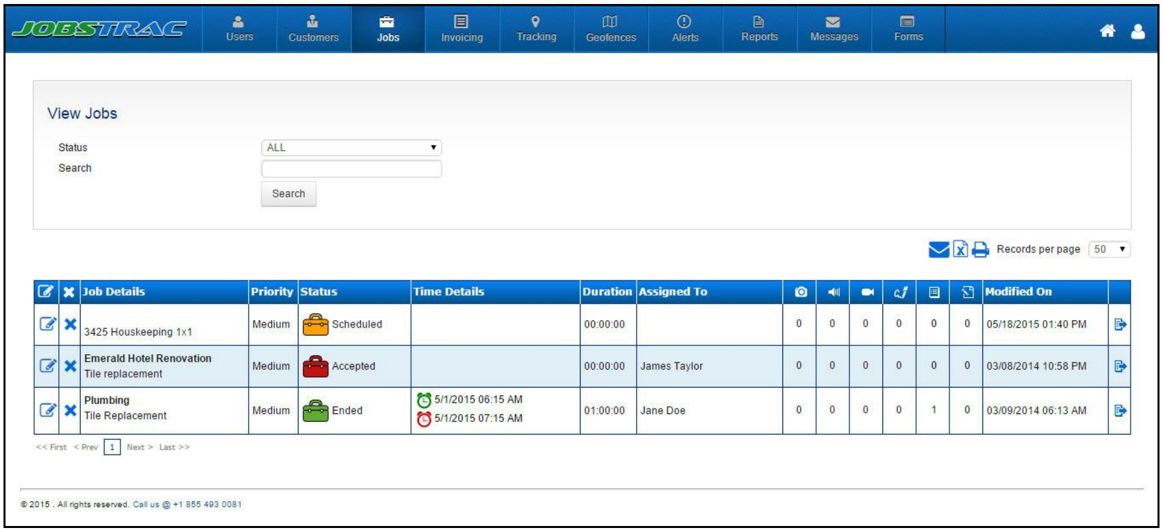
The **View Job** option shows Job details that were created previously. This section shows Job details like user to which a Job is assigned, Job Name, Description, Start Time, End Time and Status.

	Note	The Job details for a user can be created by Manager. Information on created Job can also be viewed by the Customer of that organization ID.

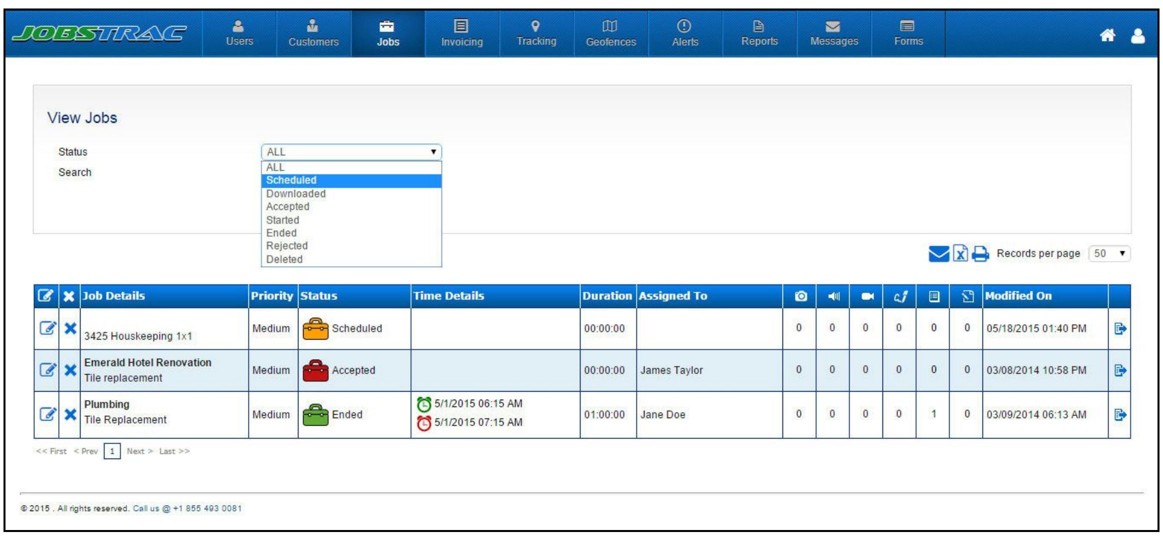
From the Jobs menu, Manager will click **View Job** as shown:



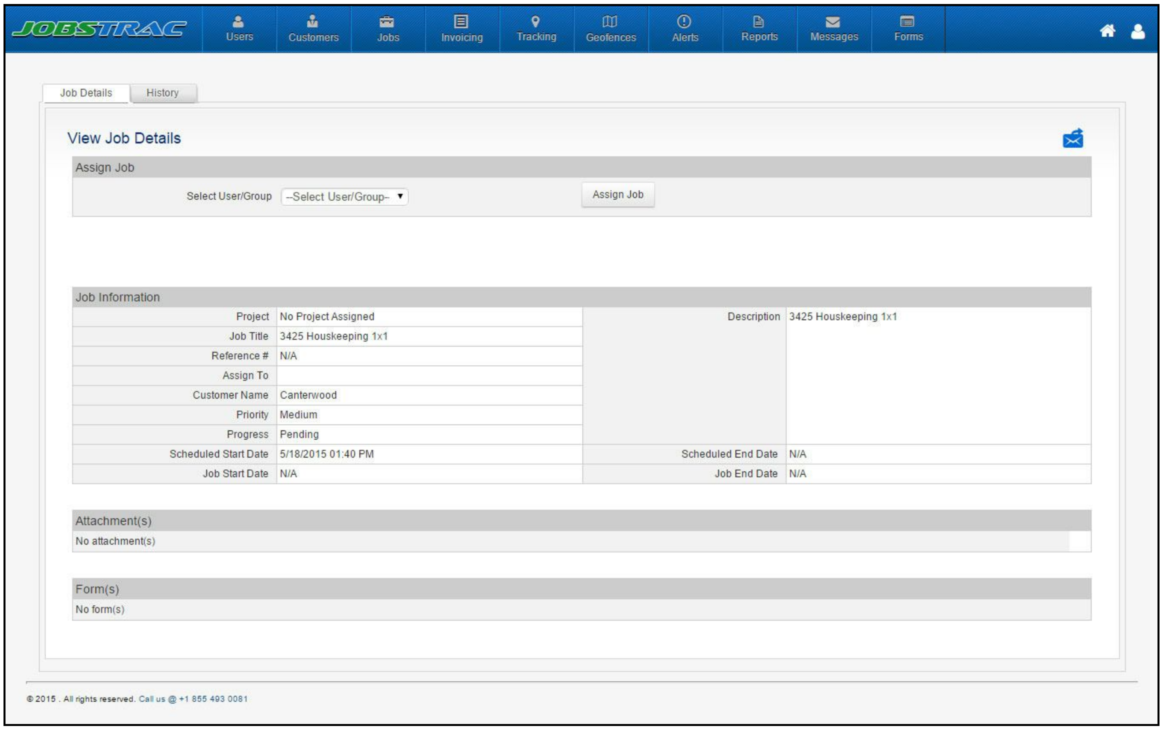
Following screen will be displayed:



Manager can also apply filters to filter the Job search as shown in following screen.

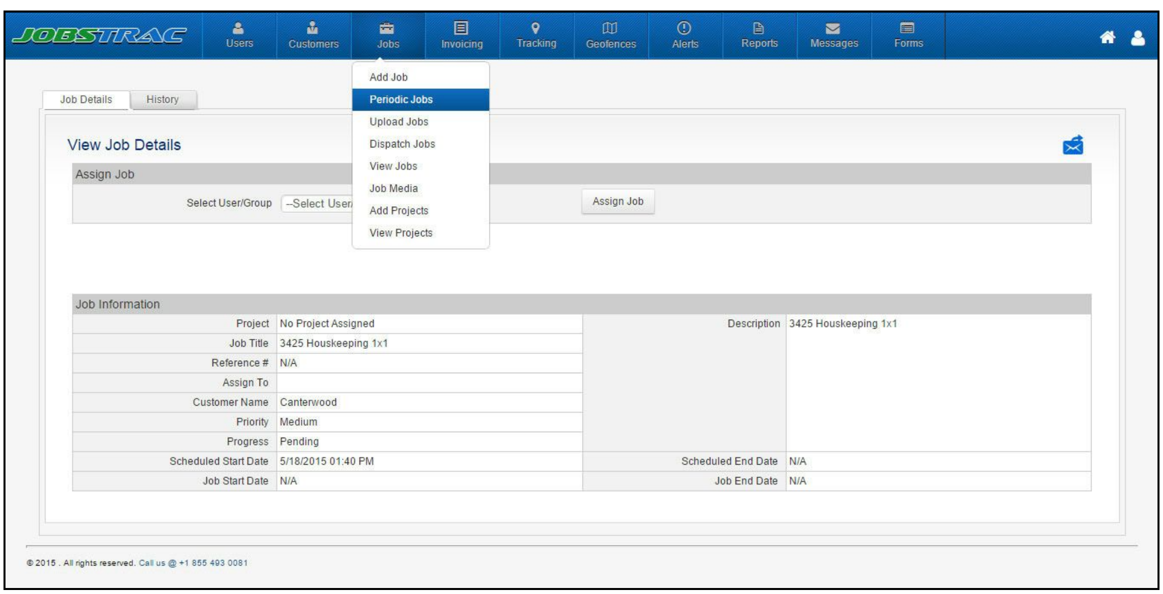


After clicking on **Job Name** from the grid following screen will appear where Manager can view all the details related to Job. This also includes audio, video and images related to that Job as shown in following screen:

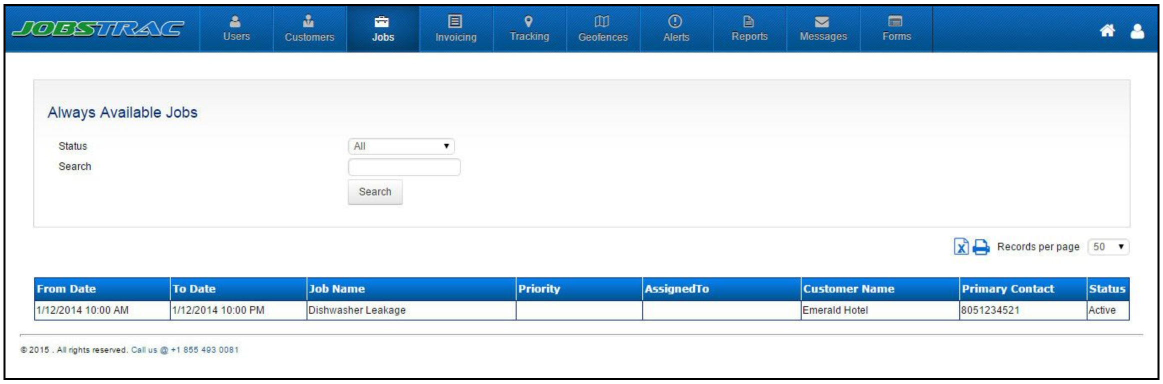


6.3 Periodic Job

To view Always Available/Periodic Job, Manager will click on **Periodic Jobs** under Jobs menu as shown:



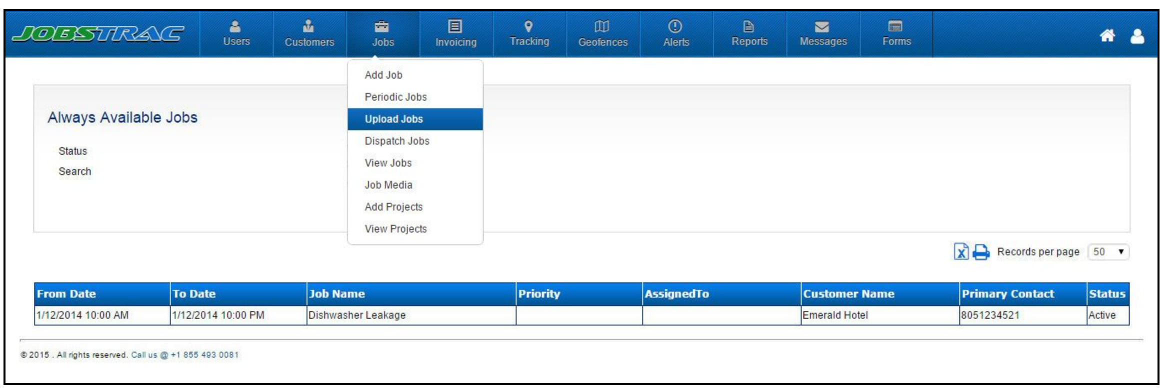
After selecting Periodic Jobs, following screen will appear:



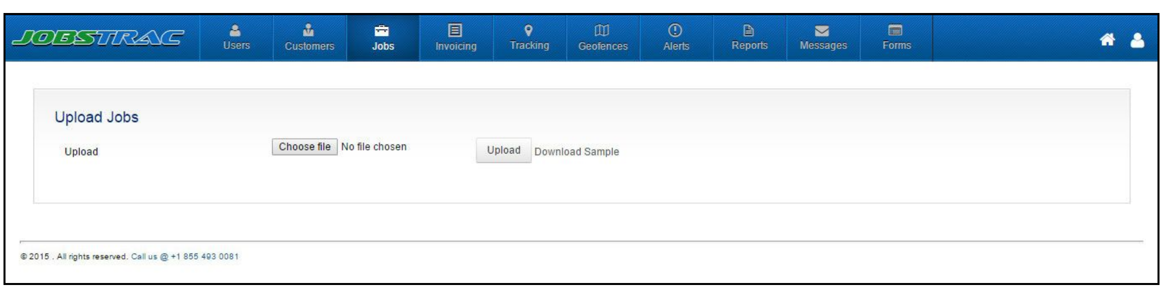
6.4 Upload Jobs

This feature allows a user to upload Jobs through a .CSV file. User can define as many Jobs in this .csv file and upload them directly.

To upload Jobs Manager will select **Upload Jobs** option from the Jobs menu as shown:



Upload Jobs screen appears as shown:



User will select the required .CSV file by clicking on Browse button and will click on Upload button in order to upload Jobs.

Manager can also view a sample Job .csv file by clicking on **Download Sample**. This will help Manager to create the file in the same structure so that there will be no issues during file upload.

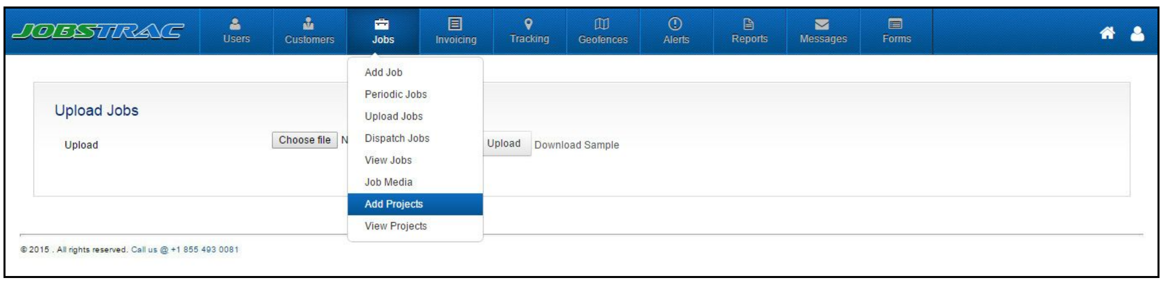
7. Projects

Projects allow Manager to create and manage projects in an organization. This section allows Manager to do the following:

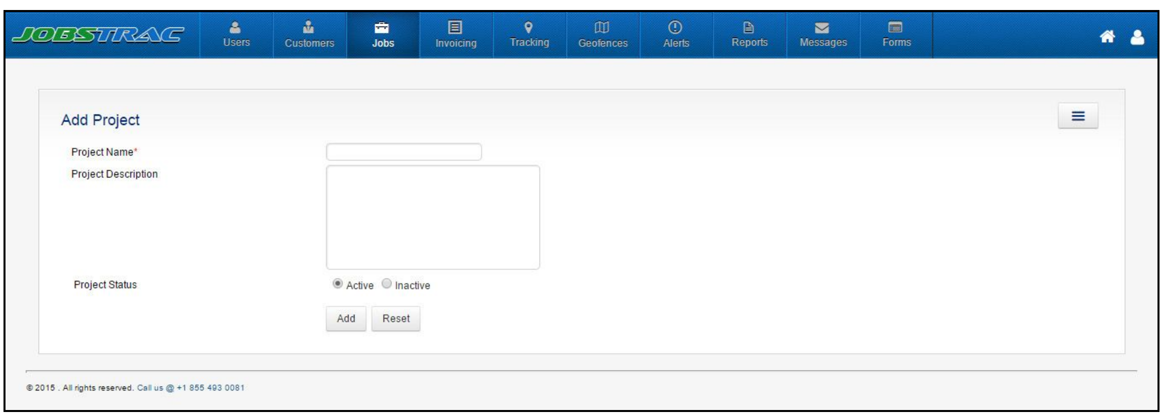
[Add Project](#)
[View / Edit Project](#)

7.1 Add Project

Add project helps a Manager to create a new project in an organization. In order to add a project Manager will select **Add Project** under **Jobs** menu as shown:



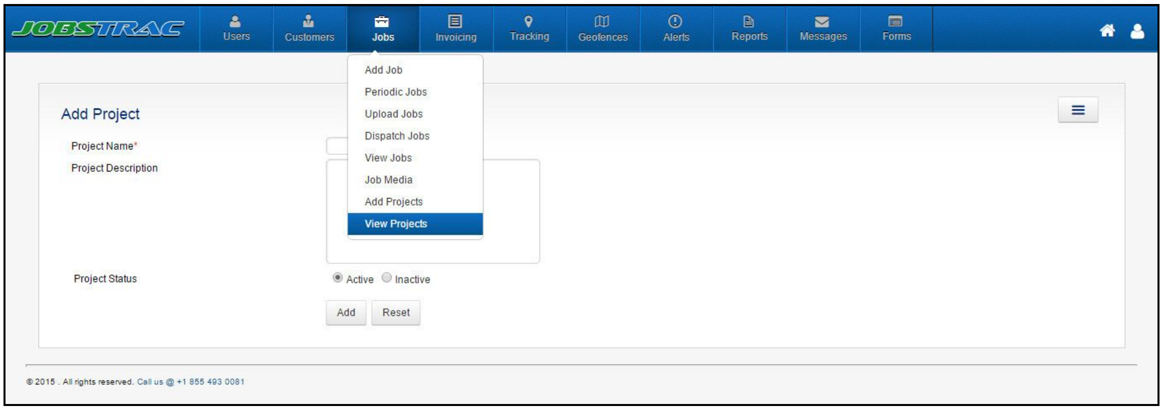
Add project screen will appear. Manager will input the necessary information on add project screen as shown:



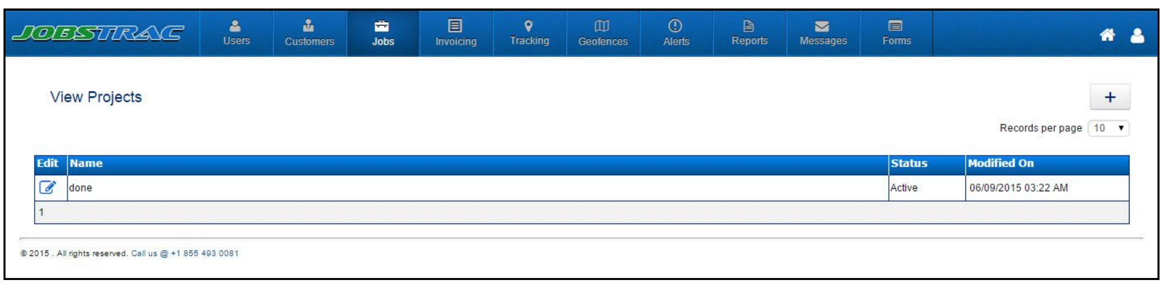
After entering required information, Manager will click on **Create** button. Information will be saved and a confirmation message will appear.

7.2 View / Edit Project

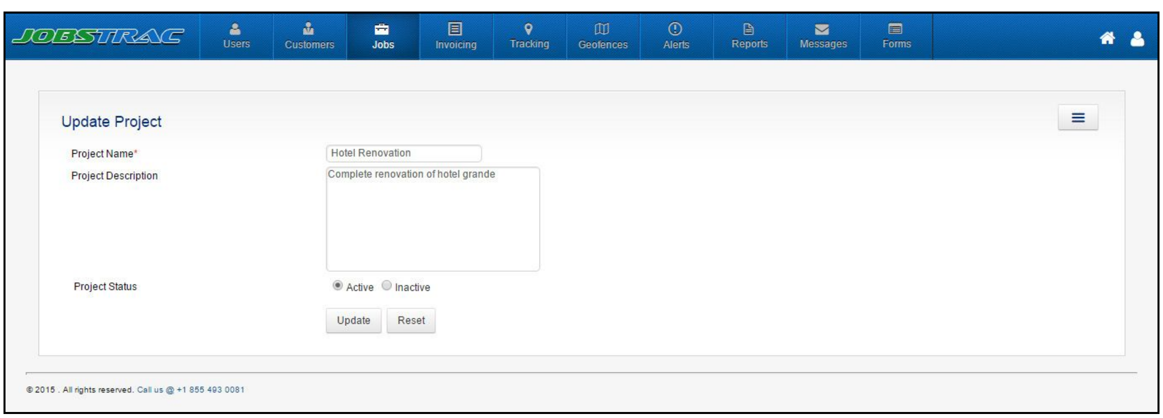
In order to view projects Manager will click on **View Projects** under **Jobs** menu as shown:



View projects screen will appear as shown:



To edit a project Manager will click on  icon. Edit project screen will appear:



Manager will update required info and will click on **Update** button. Information will be updated and a confirmation message will appear.

8. Tracking

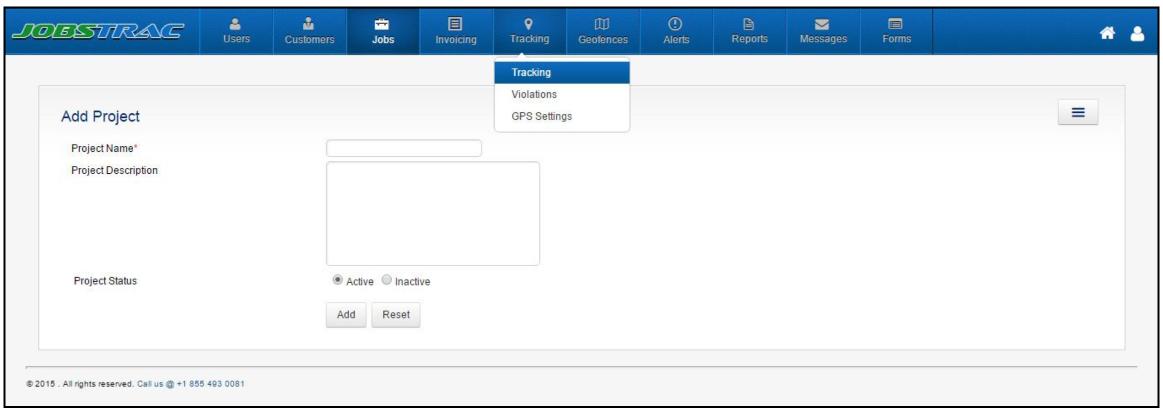
Tracking feature facilitates a Manager to view real-time location of the Field Users and Groups. This also allows a Manager to create and manage Geofences and Landmarks.

By this feature, JobsTrac provides the option for Manager to:

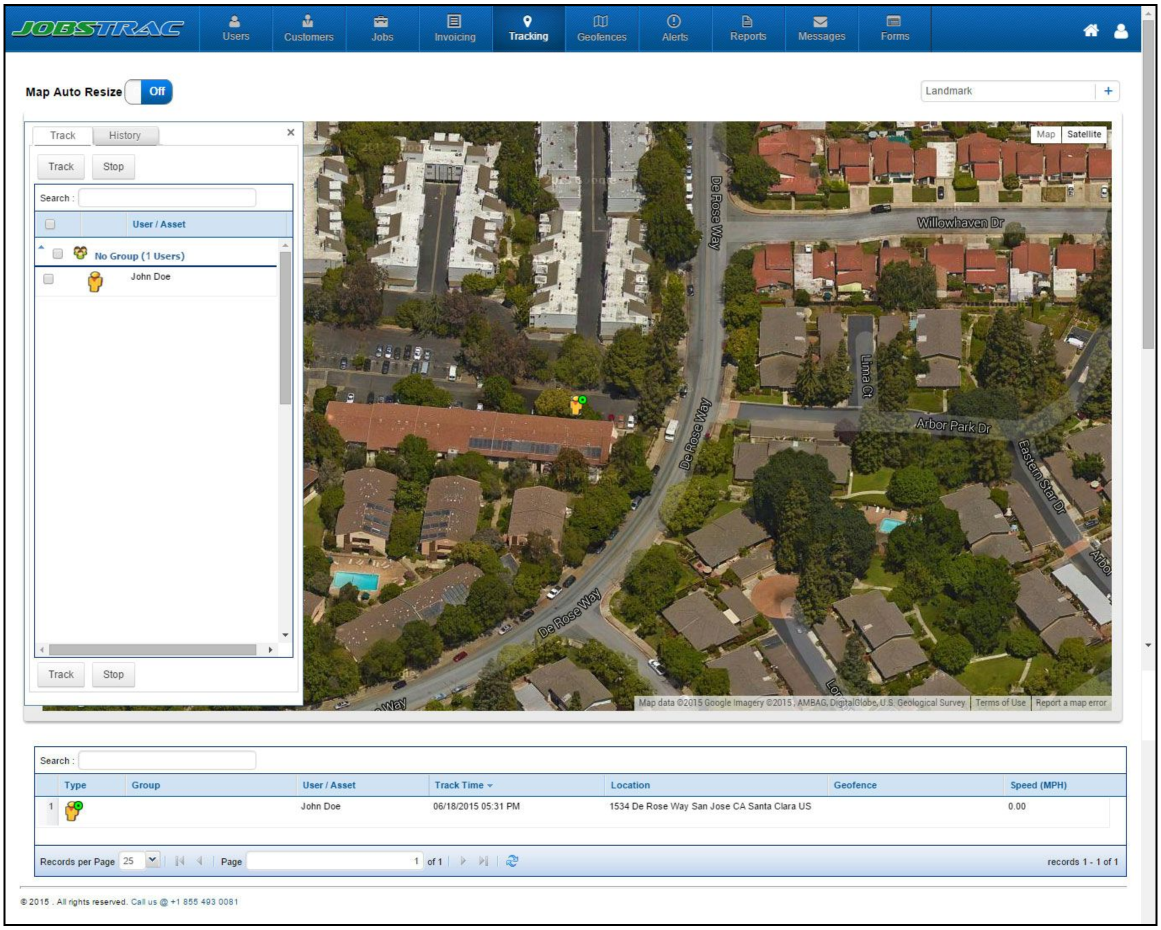
- Track Field Users.
- View tracking history of Field Users.
- View location details of multiple Users on a single map.
- View journey details of all or specific user.

8.1 Basic Tracking

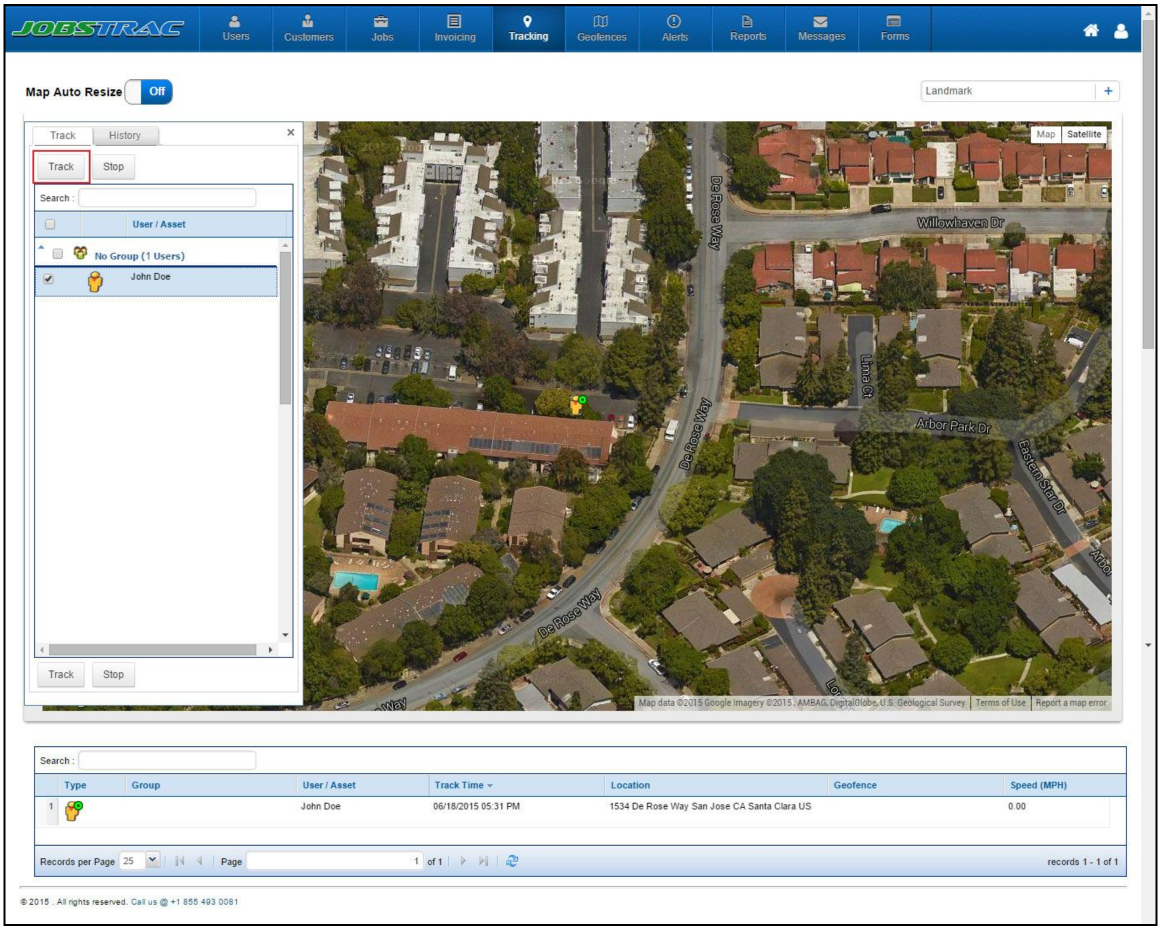
This feature allows the Manager to track specific or all Users on map. In order to start tracking Manager will select **Tracking** option under Tracking menu as shown:



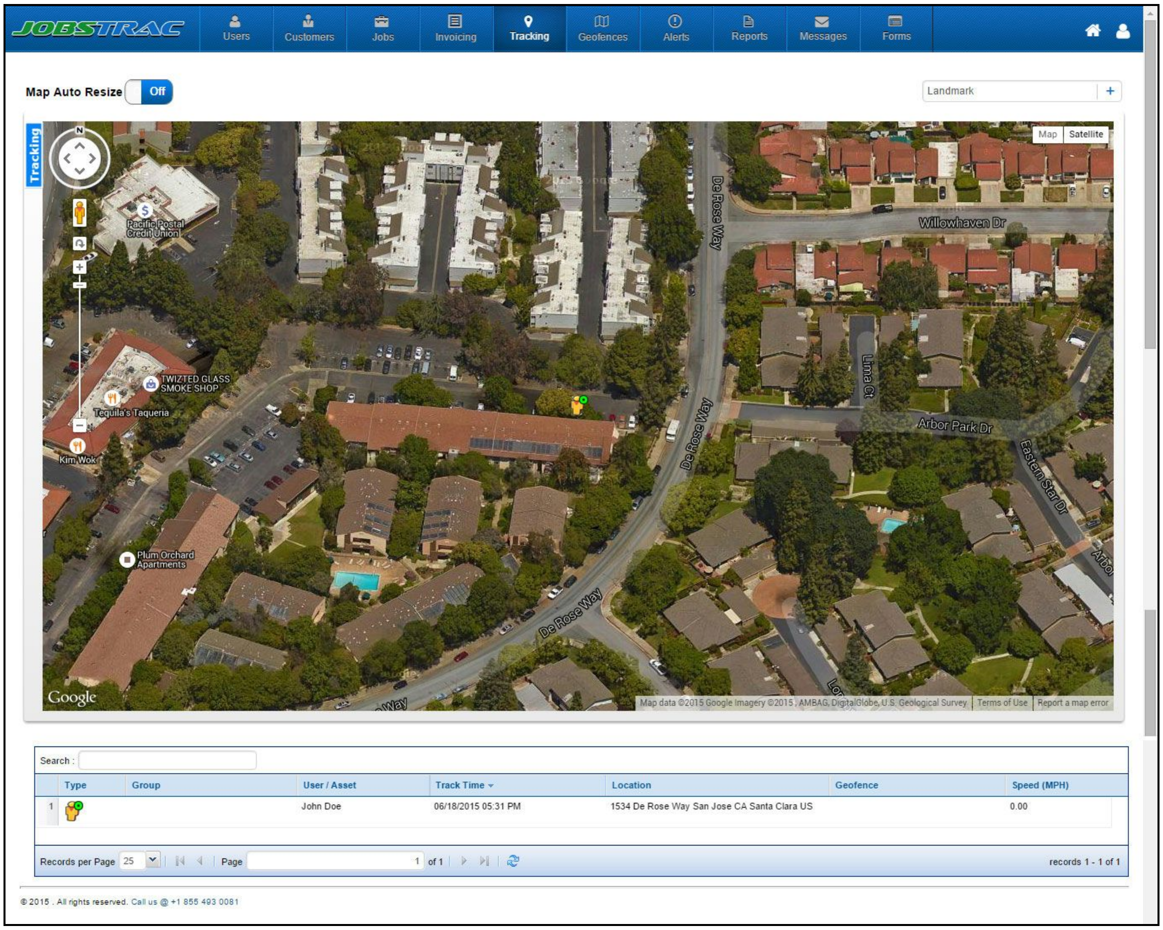
Following screen will appear after selecting Tracking:



Track option will be highlighted by default along with the Users to track. Manager will select a specific user as shown and click on **Track** button as shown:

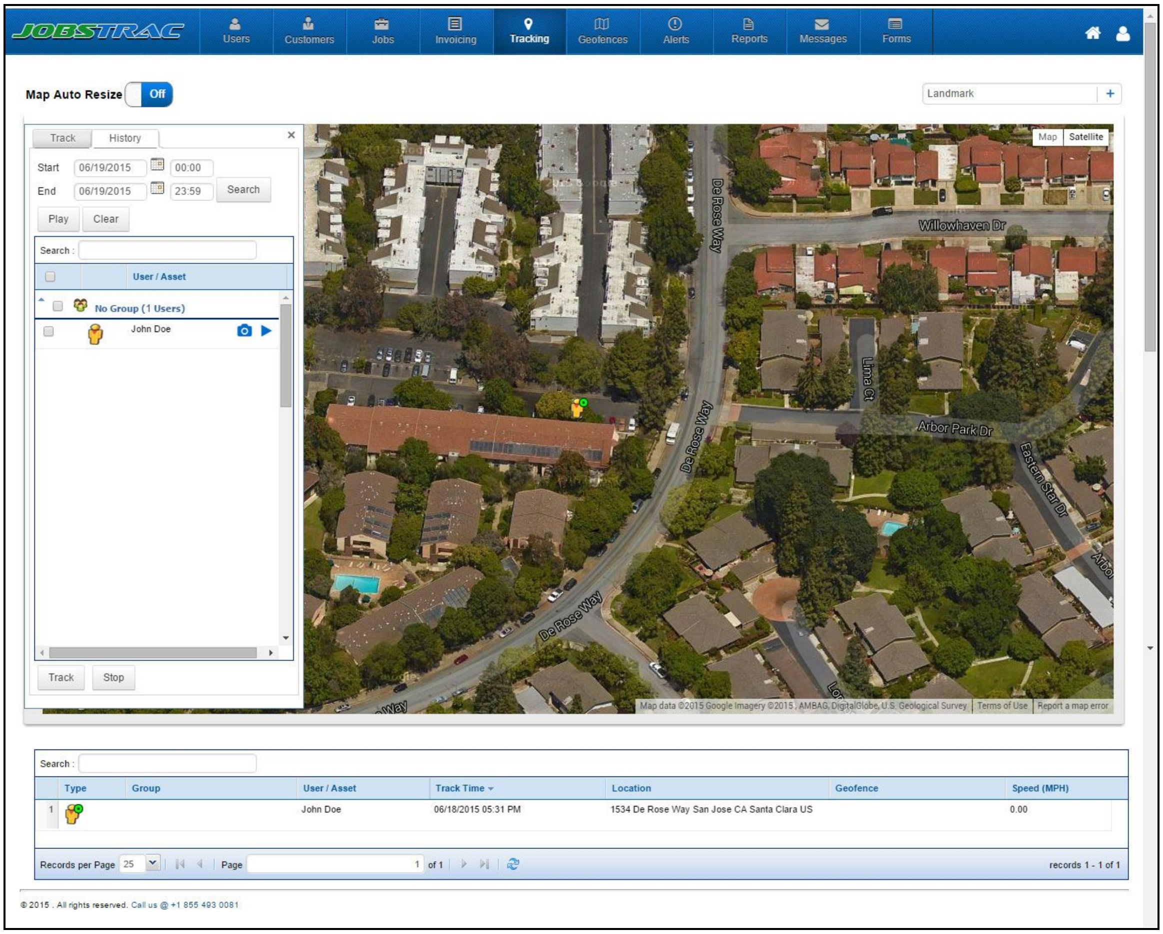


Employee location will show up on the map as shown in the screen:



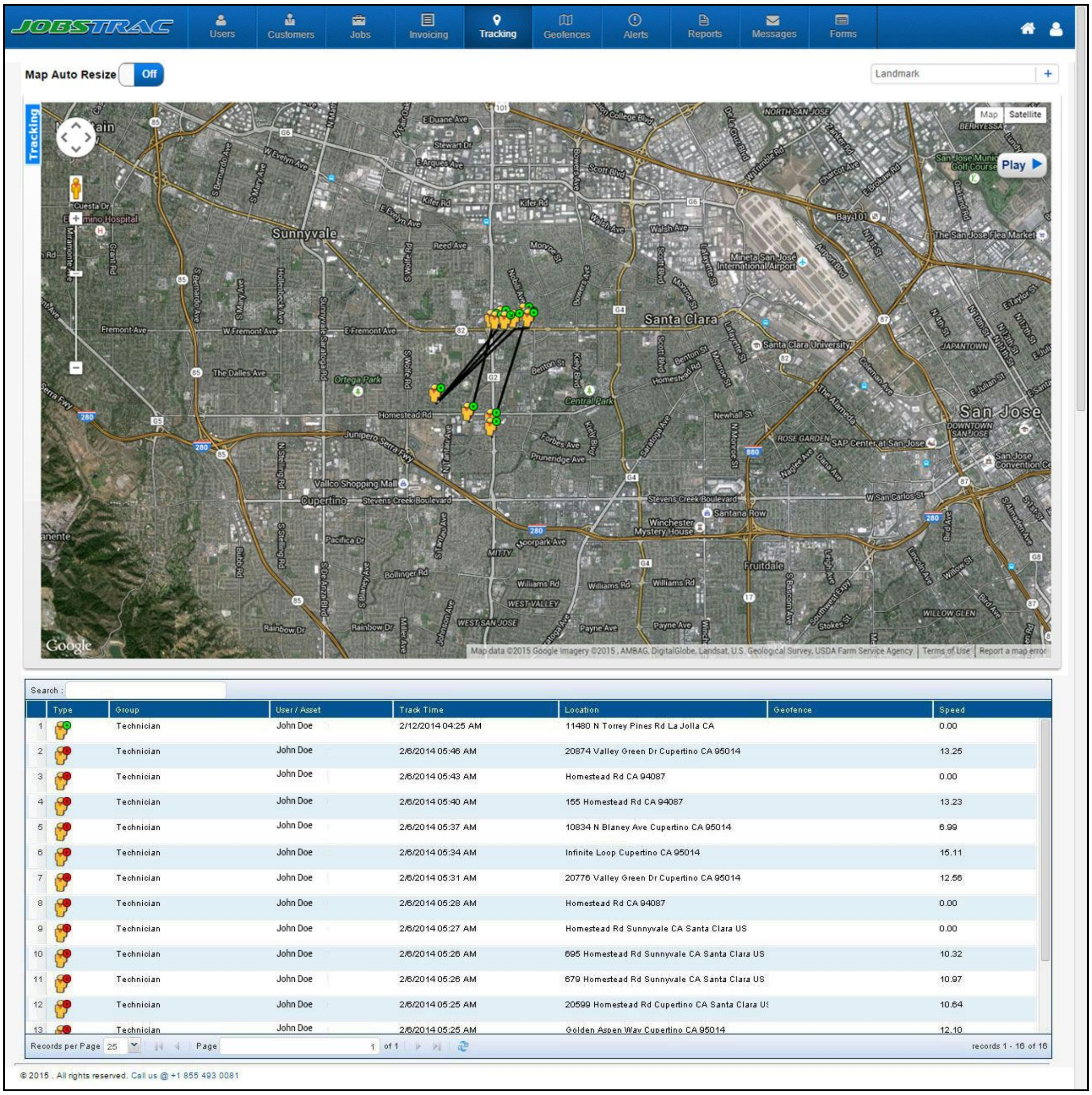
8.1.1 Tracking History

From the Tracking home screen Manager will select **History** tab in order to view tracking history for specific or all employees as shown. Manager will specify a date and will search for a employee for which he wants to view the tracking history as shown in the following screen:



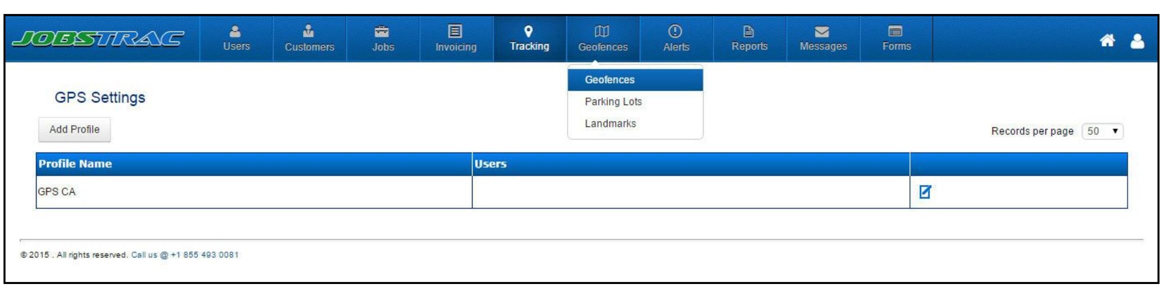
Manager will click on icon or can also click on **Play** button to view the tracking history.

Following screen shows the tracking history for the selected employee.



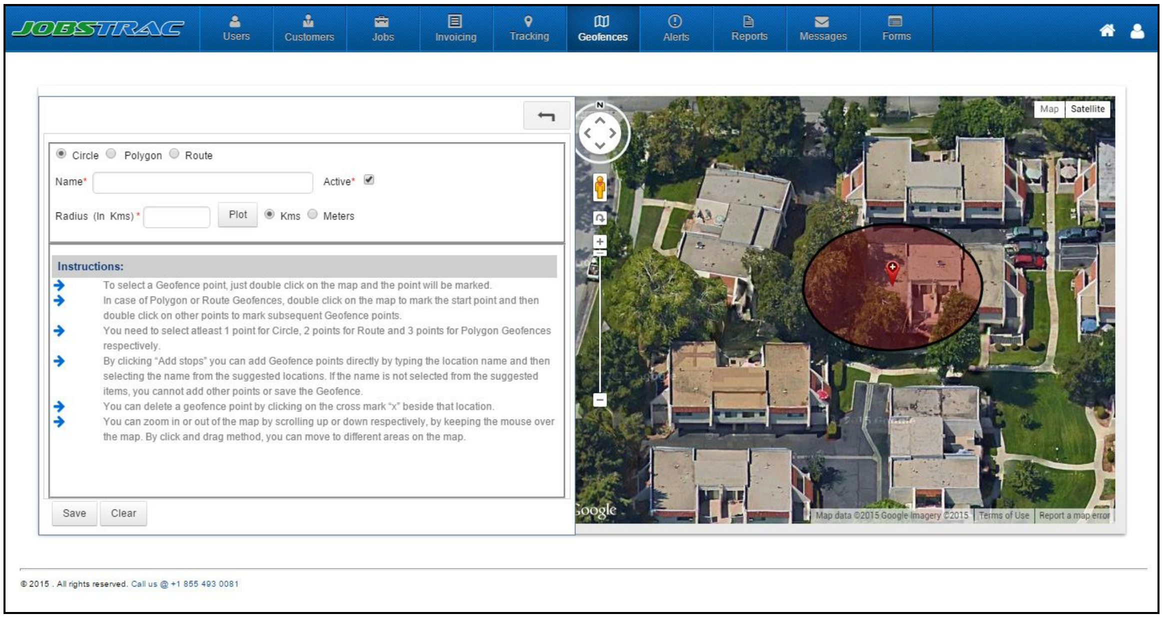
8.2 Geofences

This feature allows Manager to create, assign and view/edit geo-fence to specific or all employees. In order to access Geo-fence features Manager will click on **Geo Settings** option from the main menu as shown:

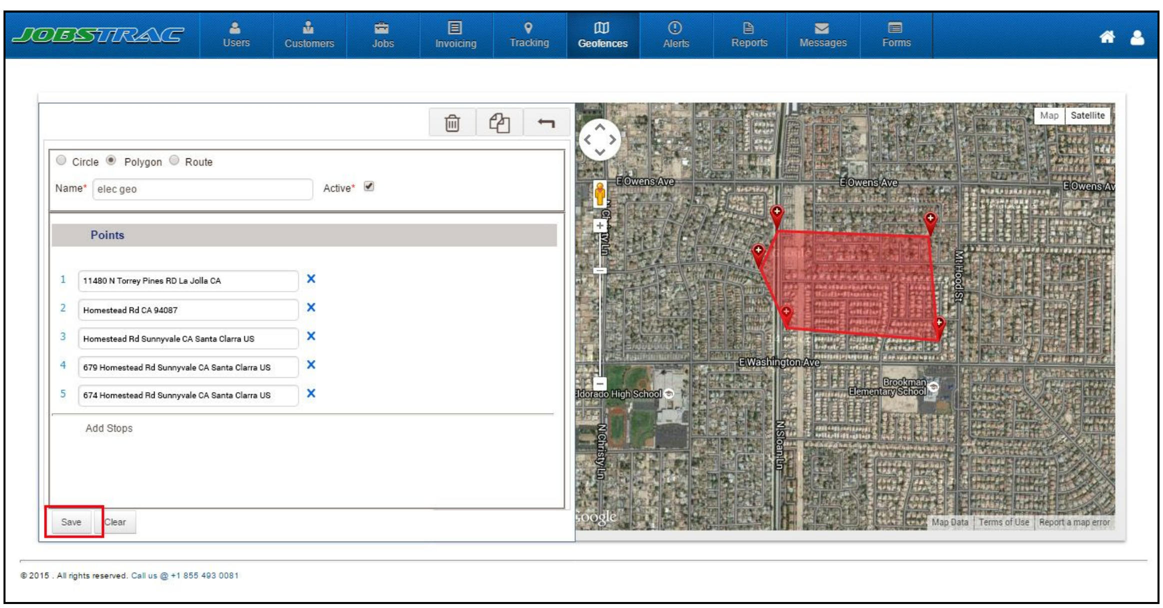


Geo settings default screen will open as shown with Create menu selected by default. Manager can create a circular or a polygon shaped geo-fence after locating an address by clicking on map initially.

After a marker is plotted Manager will enter geo-fence name and radius and will click on **Plot** button to create a geo-fence. Manager can also click around marker to plot a specific circular area on map as shown:

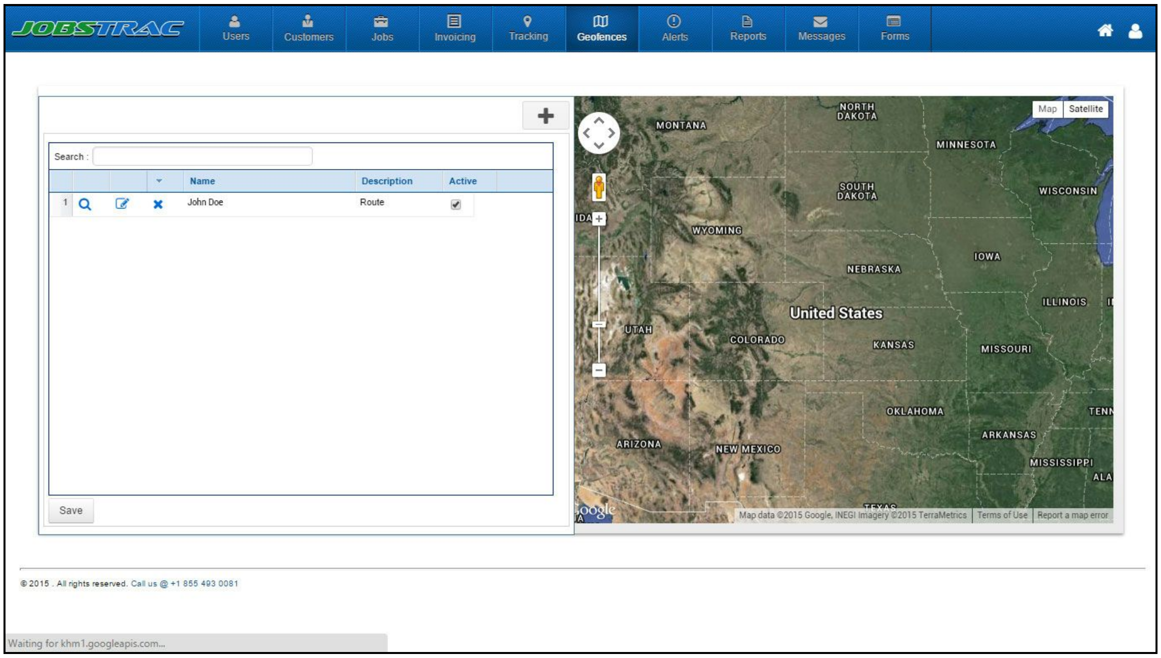


Geo-fence will be created as shown above. In order to save the created geo-fence Manager will click on **Save** button and a confirmation message will appear. Manager can similarly create a polygon shaped geo-fence by clicking on **Polygon** button. To create a polygon shaped geo-fence Manager can click on any desired location on map as shown:

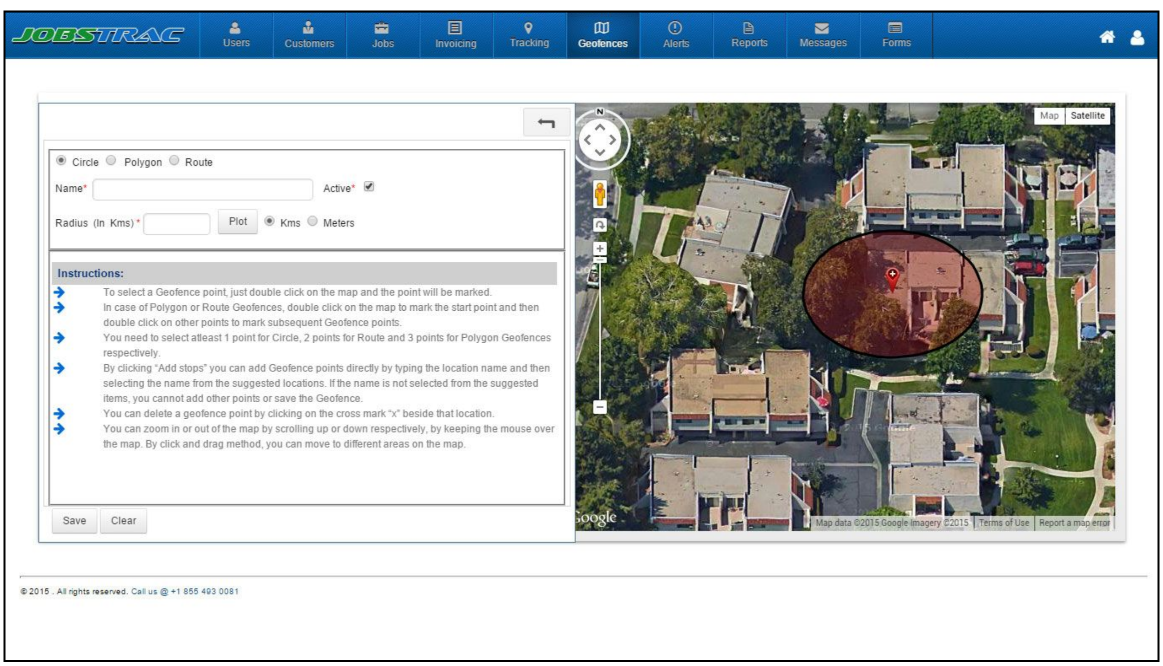


8.2.1 View / Edit Geofence

In order to view a geofence Manager will click on **View** tab. Following screen will appear:

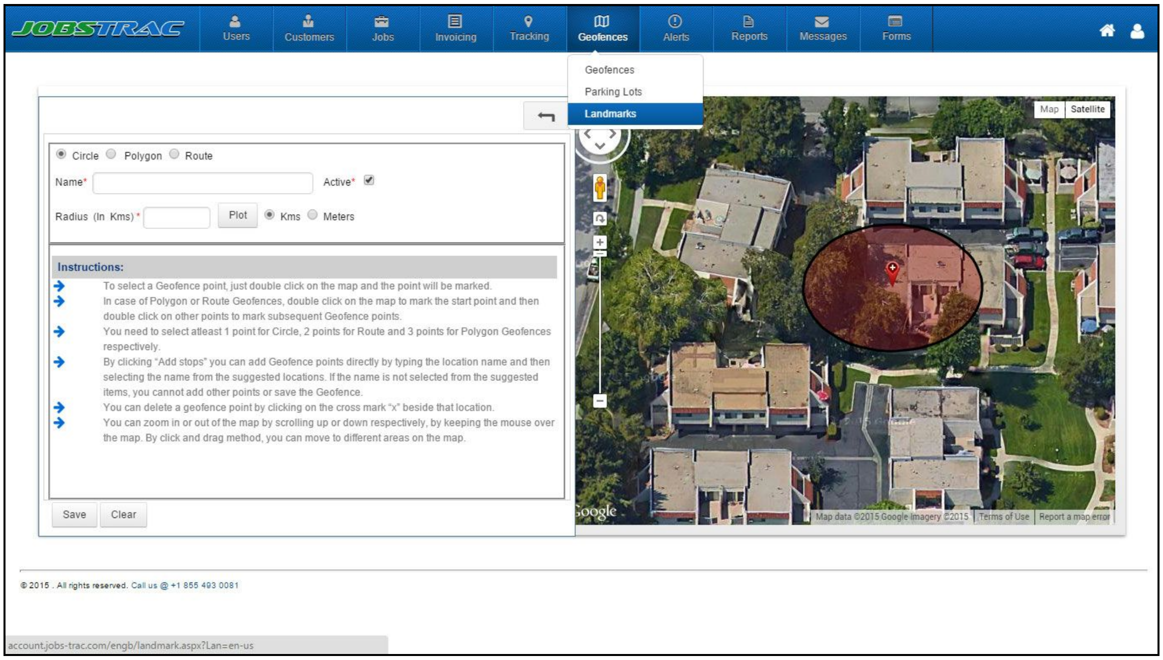


Manager will click on icon to edit the geofence. Following screen will appear from which Manager can edit the geofence:

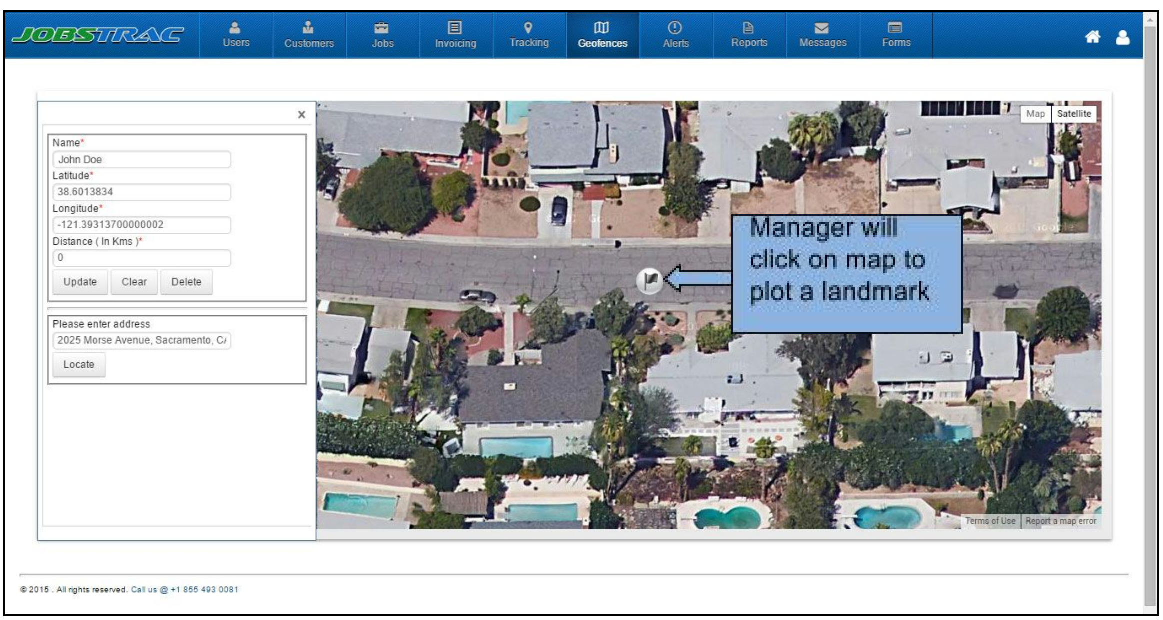


8.3 Landmarks

This feature allows and Manager to create, manage and view/edit landmarks. In order to access this feature Manager will select **Landmarks** under Tracking menu as shown:



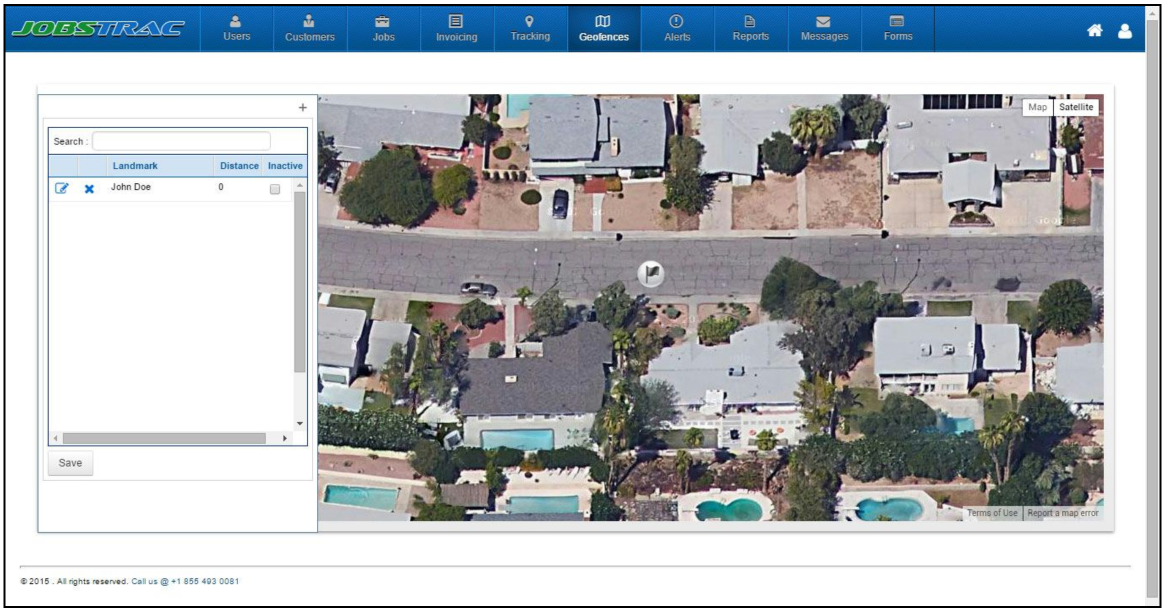
Create Landmark option will be highlighted by default. Manager will enter desired details and will also click on a specific area on map to highlight the landmark as shown:



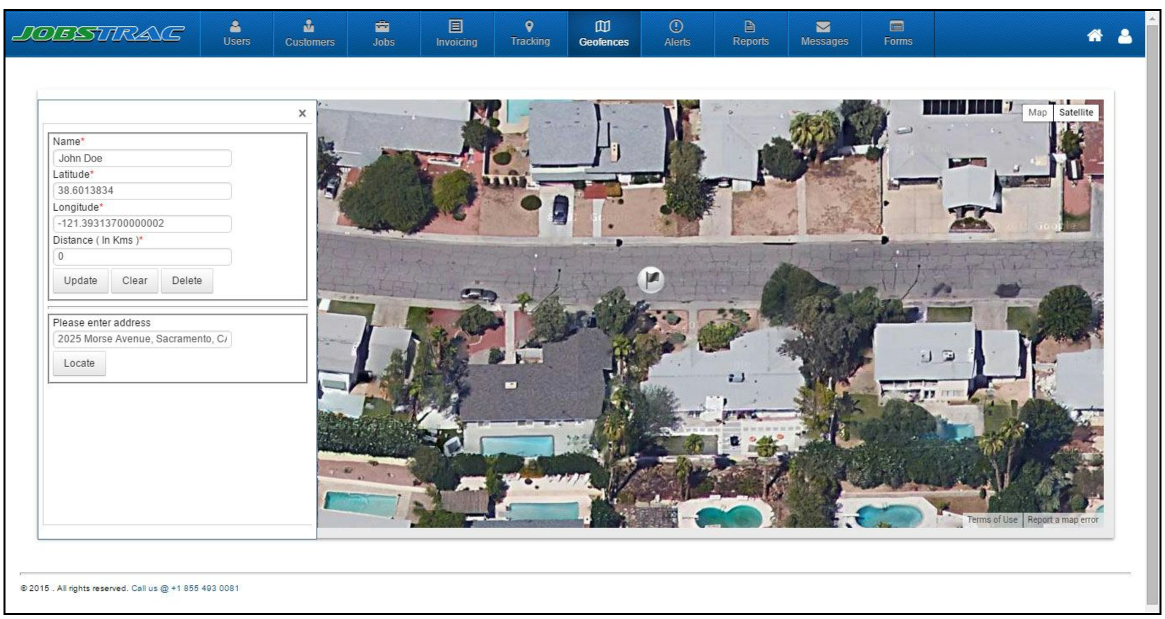
On clicking **Save** button landmark will be saved and a confirmation message will appear.

8.3.1 View / Edit Landmark

In order to view/edit landmarks Manager will select **View** option**.** A list of already created landmarks will show up as shown:



Manager will have an option to edit landmark by clicking on **Edit** icon. Following screen will appear after clicking on Edit icon:



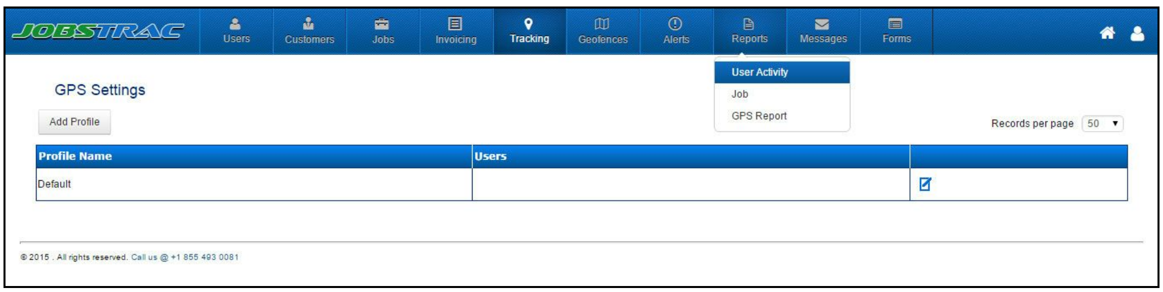
9. Reports

Reports module allows a Manager to gain a better visibility on daily operations in an organization. This module allows a Manager to view following reports:

- User Activity Report
- Job Report
- GPS Report

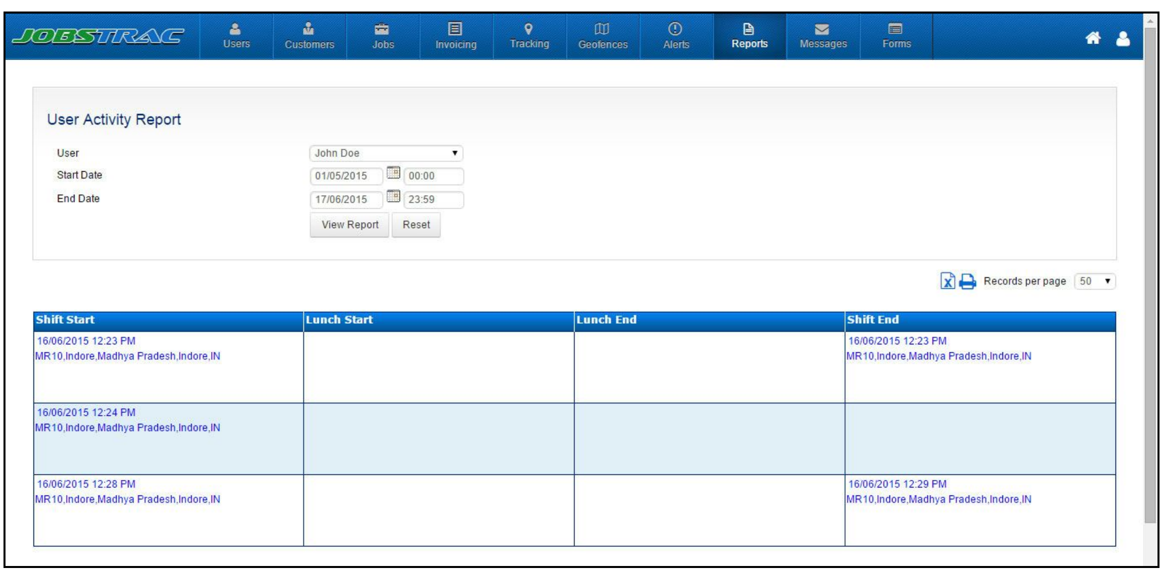
9.1 User Activity Report

User Activity Report is used to review detailed time sheet data for a Field User. Manager will click on **User Activity Report** under Reports menu as shown:



The User Activity Report screen appears. Manager will select a user, start date, end date and will click on **View Report** button in order to view the user activity report.

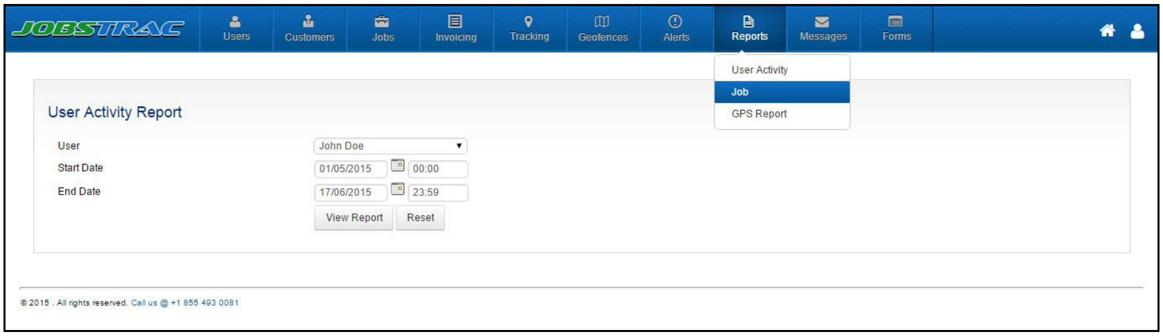
The **User Activity Report** screen appears as shown:



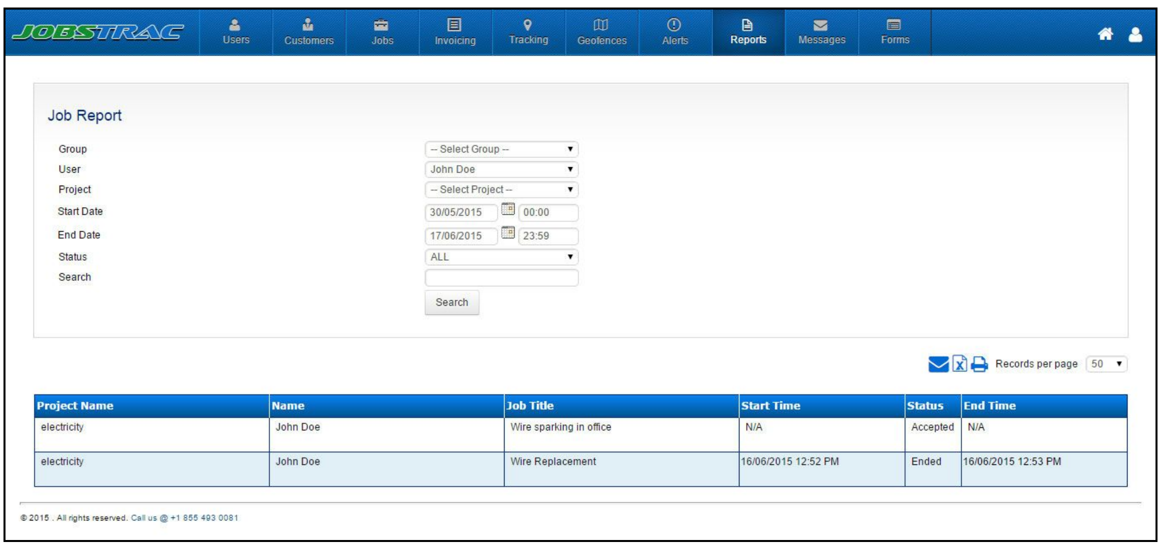
This report shows Time for Shift start, Lunch Start, Lunch End and Shift End.

9.2 Job report

Manager will select **Job Report** option from the Reports menu as shown.



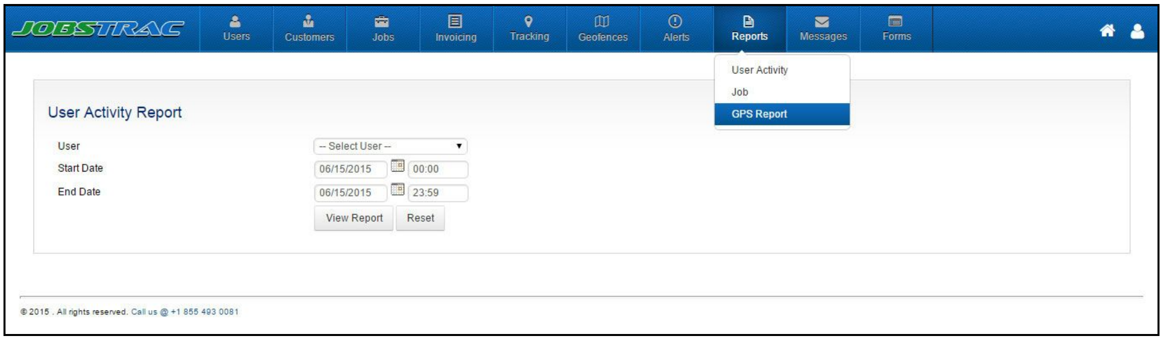
From the Job report screen Manager will select required information and click on **View Report** button. Job details report will appear as shown:



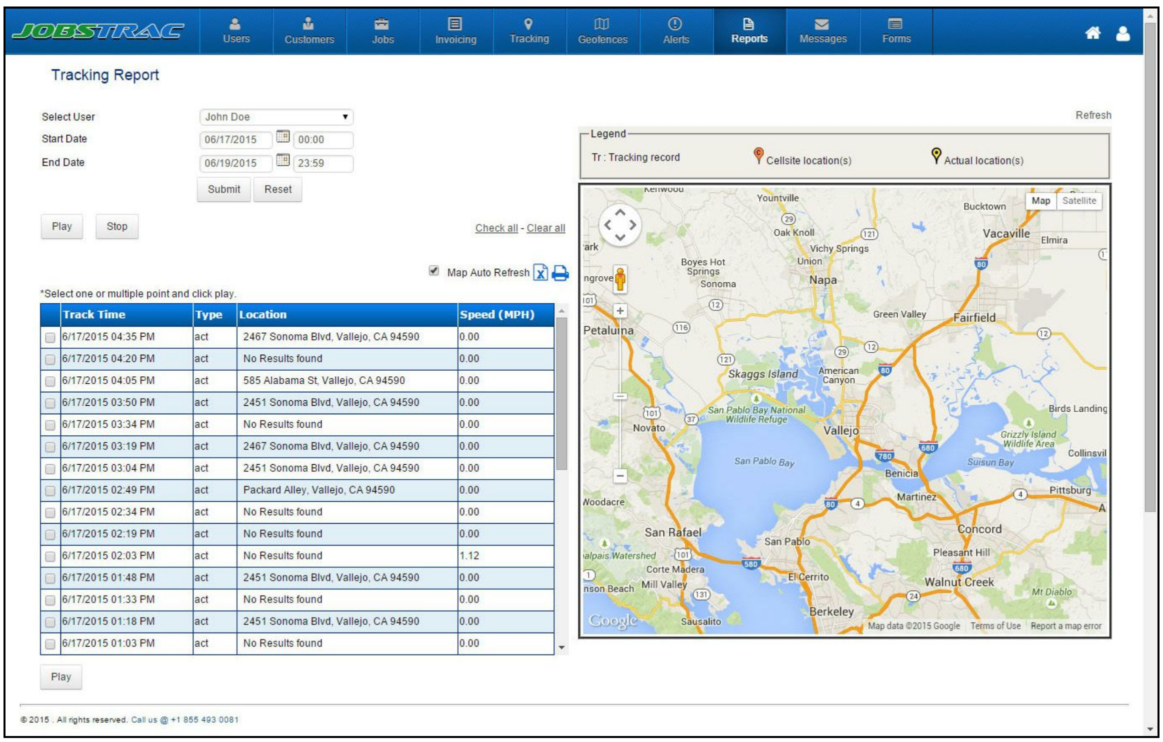
Manager can export the report to excel and can also take print out of the details.

9.3 GPS Report

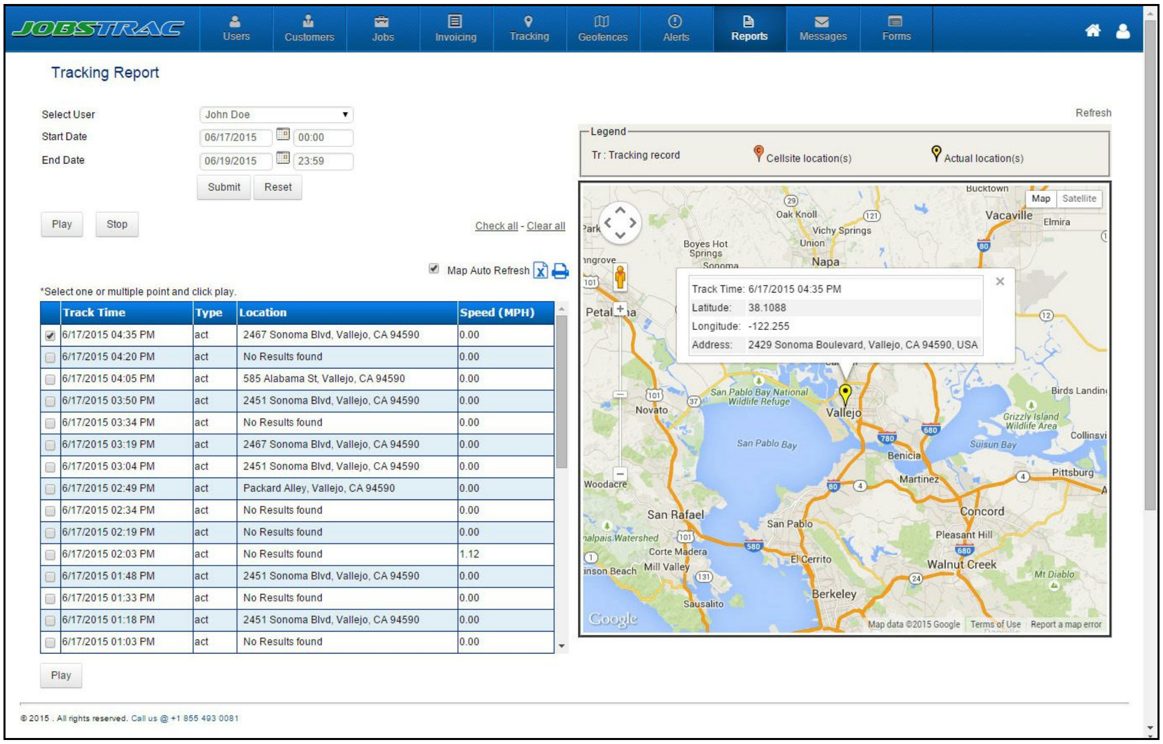
In order to view this report Manager will select **GPS Report** under Reports menu as shown:



GPS Report screen will appear as shown. Manager will select a Group / user and will click on **Submit** button. Details will appear as shown:



Manager can select specific location and can click on **Play** button. Details will be played one by one. Following screen will appear:



10. Messaging

Messaging feature facilitates smoother communication between Manager and Field User. Manager can send and receive messages to/from Field Users. Manager can also do the following with messaging:

- Create custom messages.
- Assign custom messages to specific user.

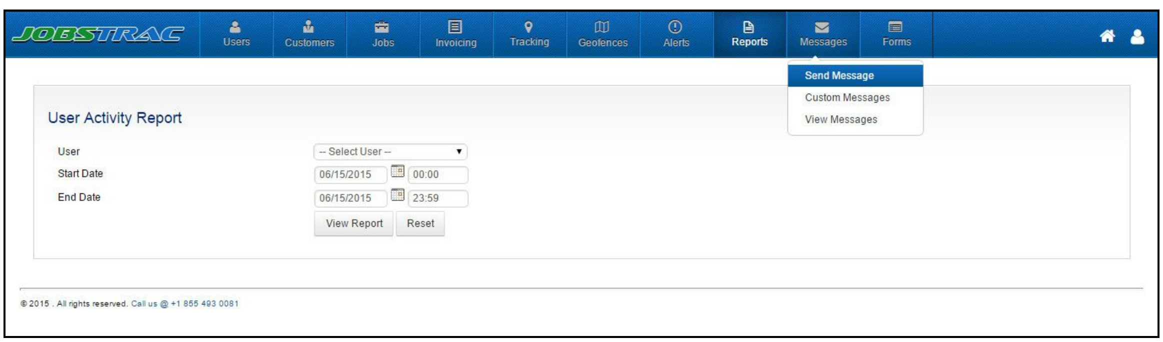
The Messaging menu option includes the following sub menus:

Send Message
Custom Messages
View Messages

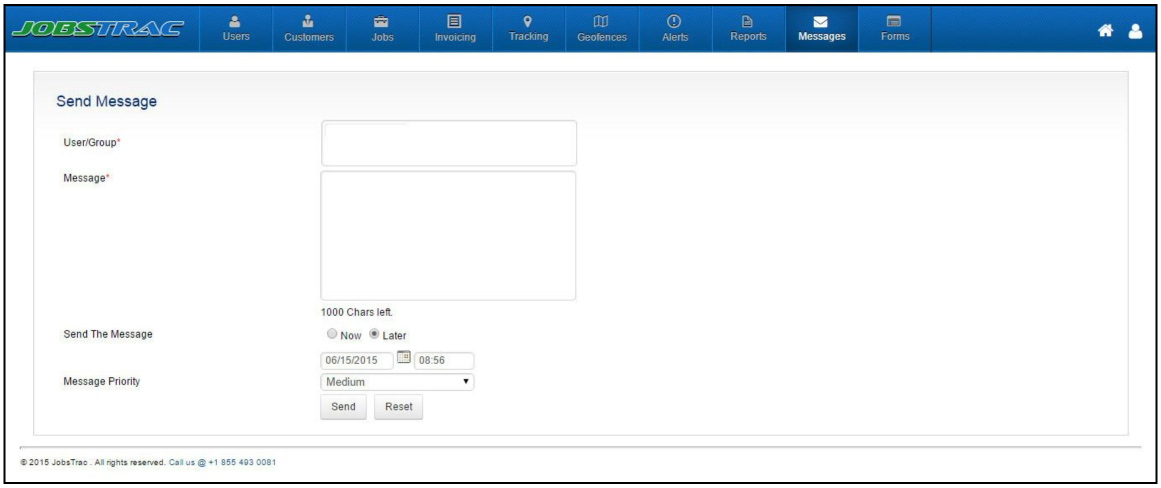
	Note	The Messages for a user can be created or edited by the respective Manager and can be viewed by Field Users.

10.1 Send Message

Send Message feature helps the Manager to send messages to individual Field Users or a Group of Users. To send a message Manager will select **Send Message** option under Messages menu as shown:



Send Message screen appears as shown:



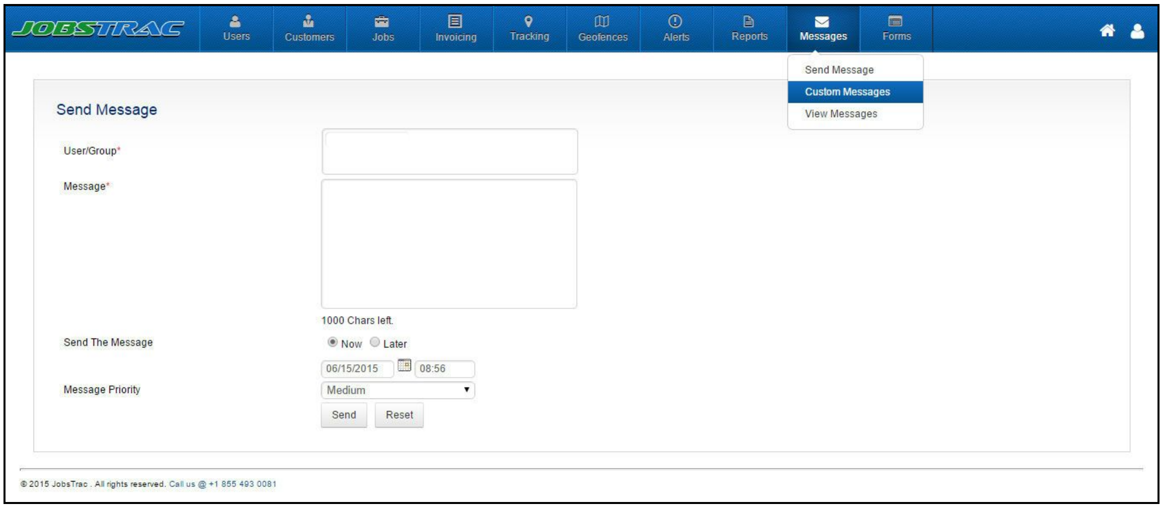
Do the required actions for the following fields:

Field	Description
Message Parameters	
Select User/Group	Select the user name or Group name to which message is to be send.
Message	Enter the message description
Send Message	
Send the Message	Select either of the following options: ♦ **Now** Select this option to send the message immediately. ♦ **Later** Select this option to schedule the message to be sent at a later date and time.
Message Priority	Select Message Priority from Dropdown List

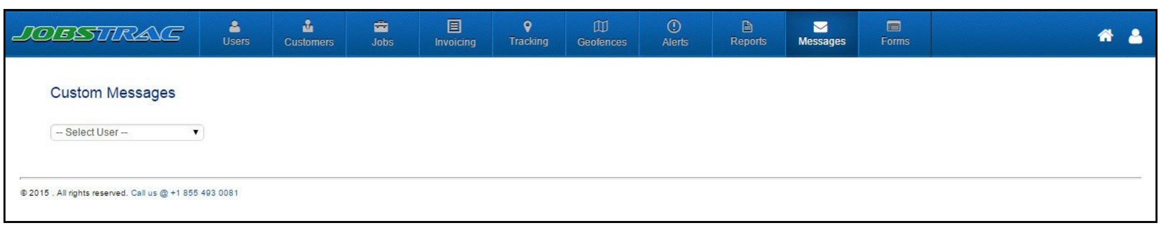
Click on the **Send** button. The confirmation message appears on the screen.

10.2 Custom Messages

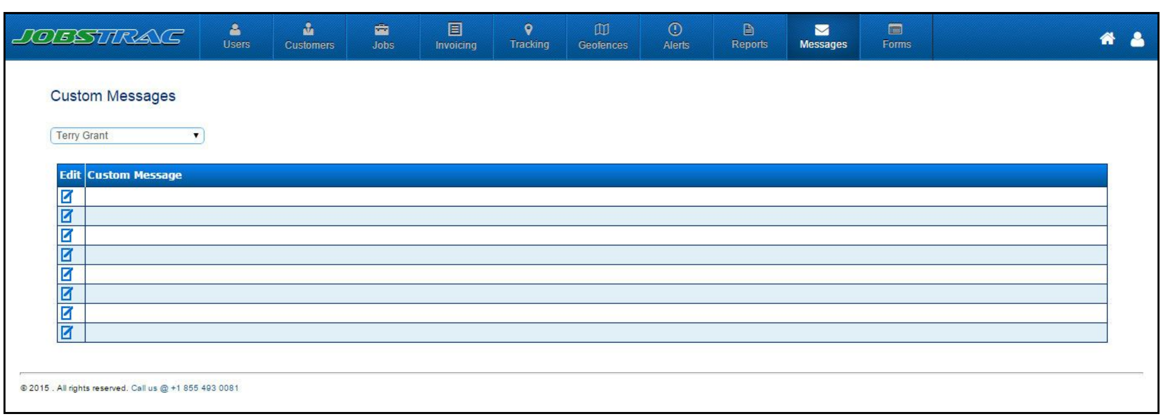
In order to create custom messages for Field Users, Manager will click on **Custom Message** under Messages menu as shown:



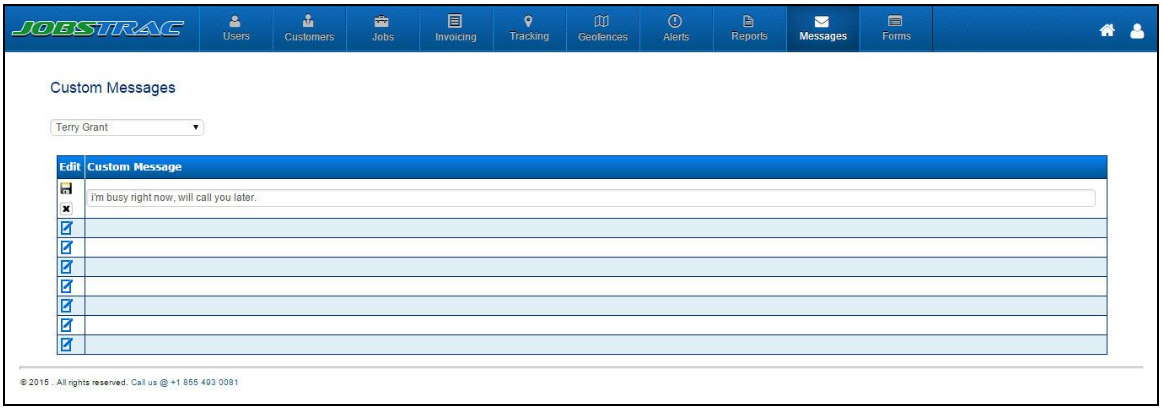
After clicking on Custom Messages following screen will appear as shown with no messages initially.



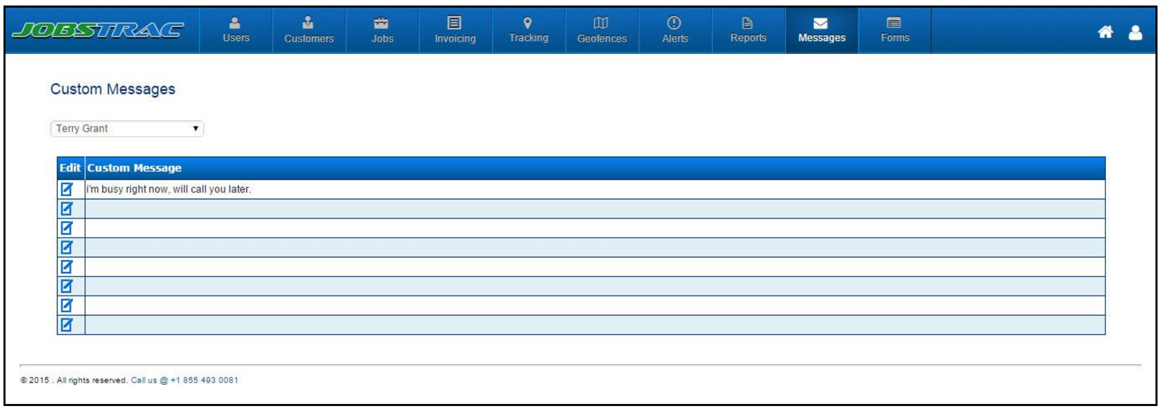
In order to create custom messages Manager will select a user from the Select User dropdown. It will display custom messages for selected user. Initially it will not have any message as shown:



Any custom message can be edited by clicking on edit icon. Following screen will appear where Manager can enter required message as shown:

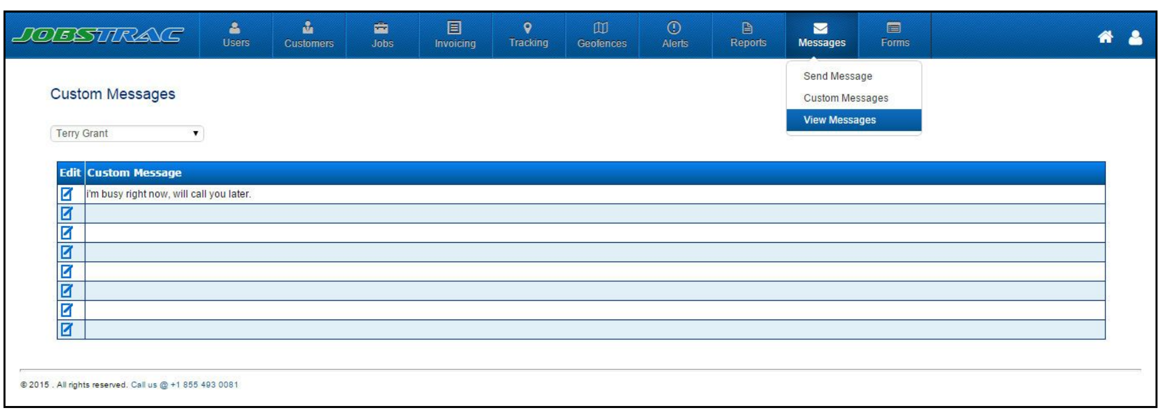


After clicking on **Save** Icon the message for that user will save and will display under that user as shown:

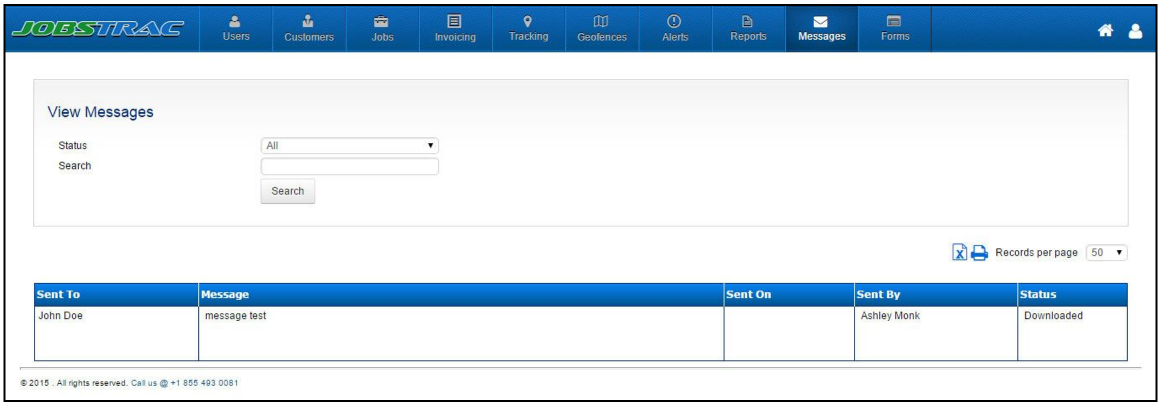


10.3 View Messages

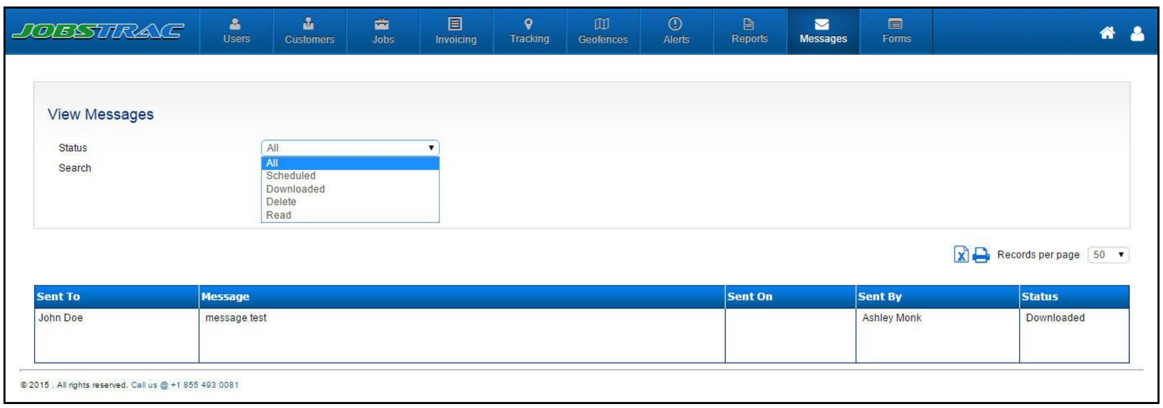
In order to view sent messages Manager will click on **View Messages** option under Messages menu as shown:



After selecting View Messages following screen will appear:



This screen will show details on sent messages along with their status like Scheduled, downloaded or read. Manager can also filter the search by selecting message status from **Status** dropdown as shown:

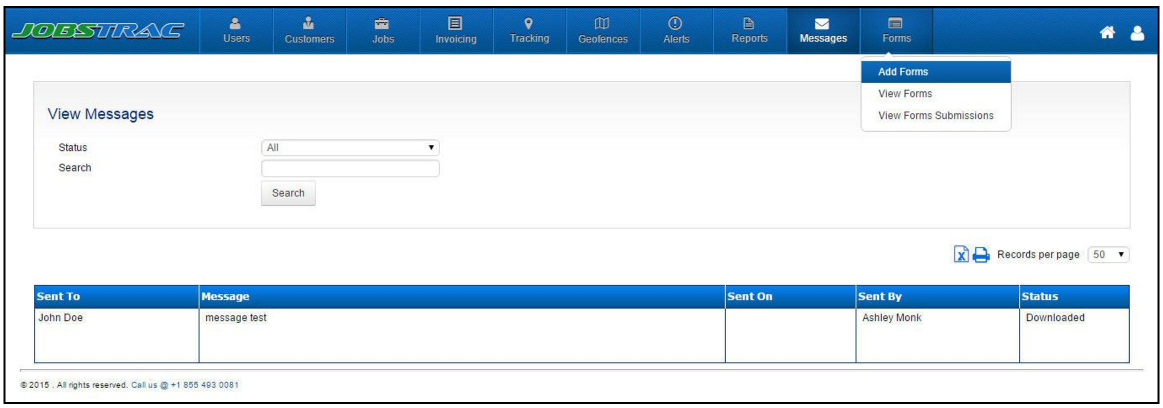


11. Forms

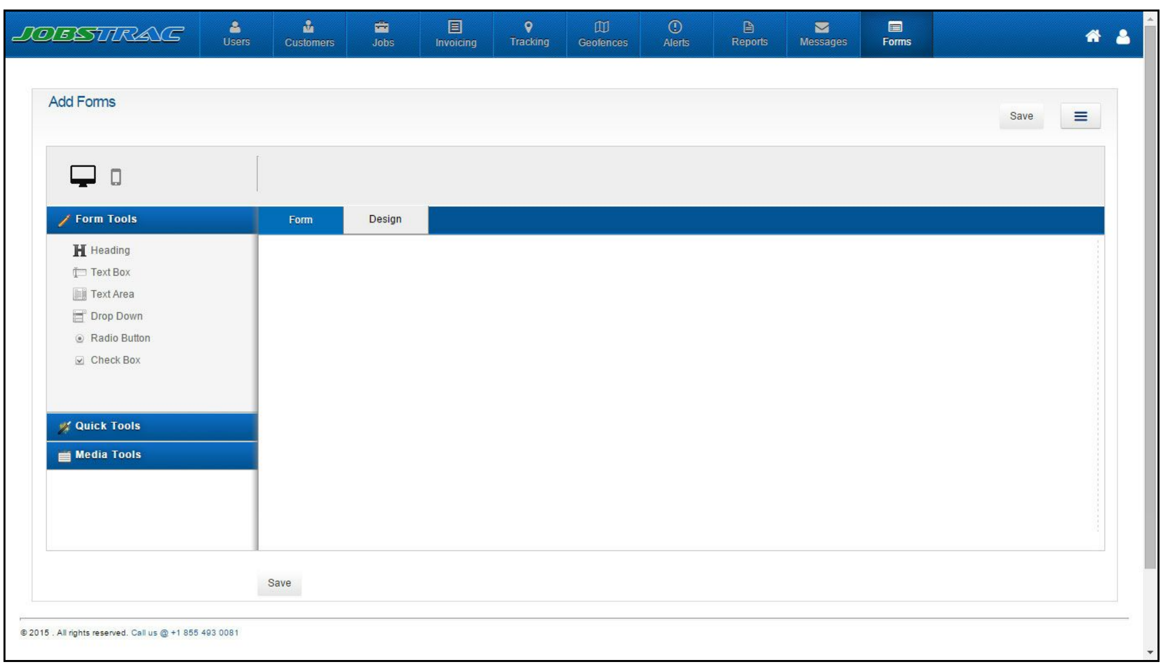
This option allows Manager to create dynamic forms for Field Users. These forms are available to Field Users on their handsets and can be used to input any information required at Customer location.

11.1 Add Forms

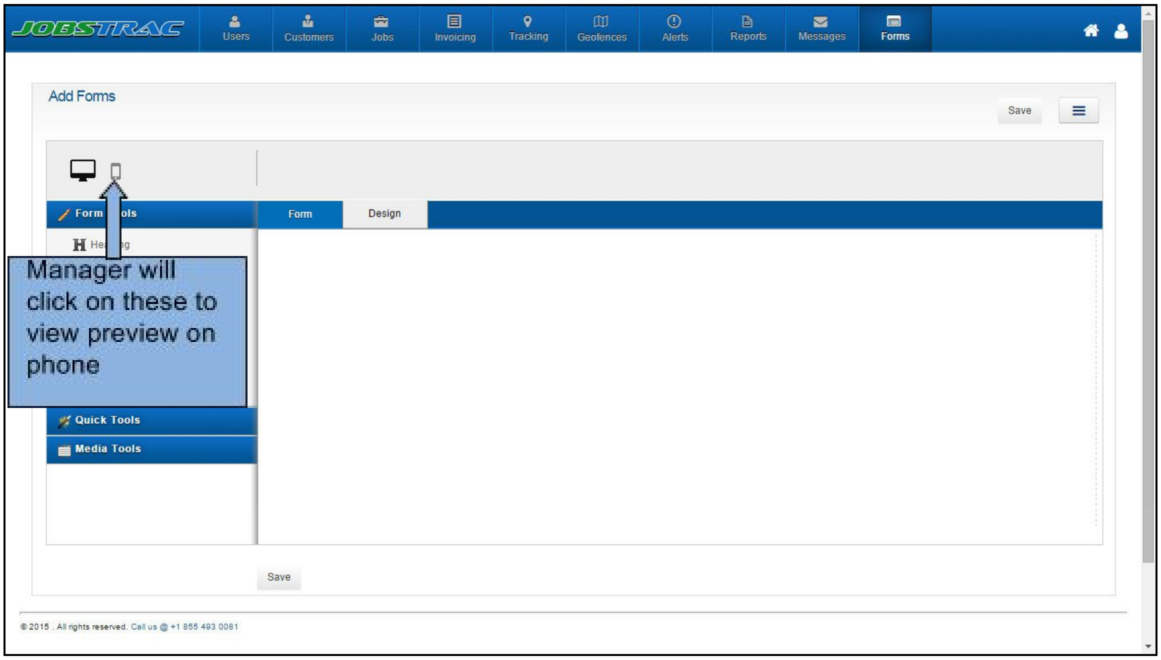
In order to create form Manager will select **Add Forms** option under Forms menu as shown:



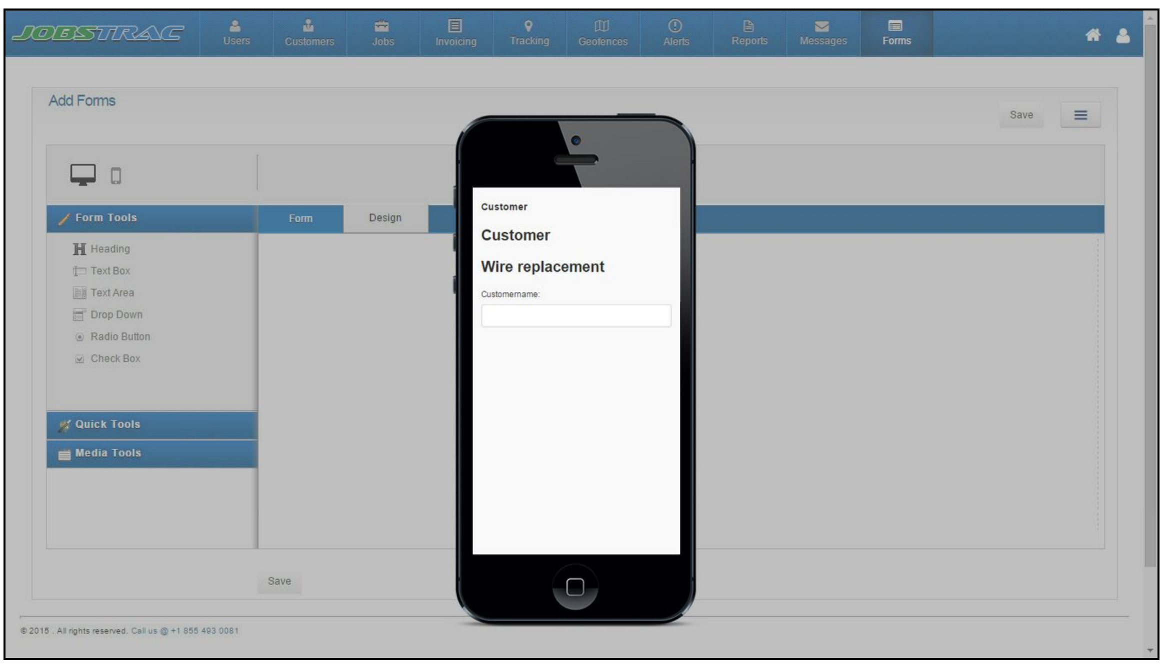
Following screen will appear after clicking on Add Forms:



Manager can drag and drop required controls to create a dynamic form and will click on **Save** button as shown:

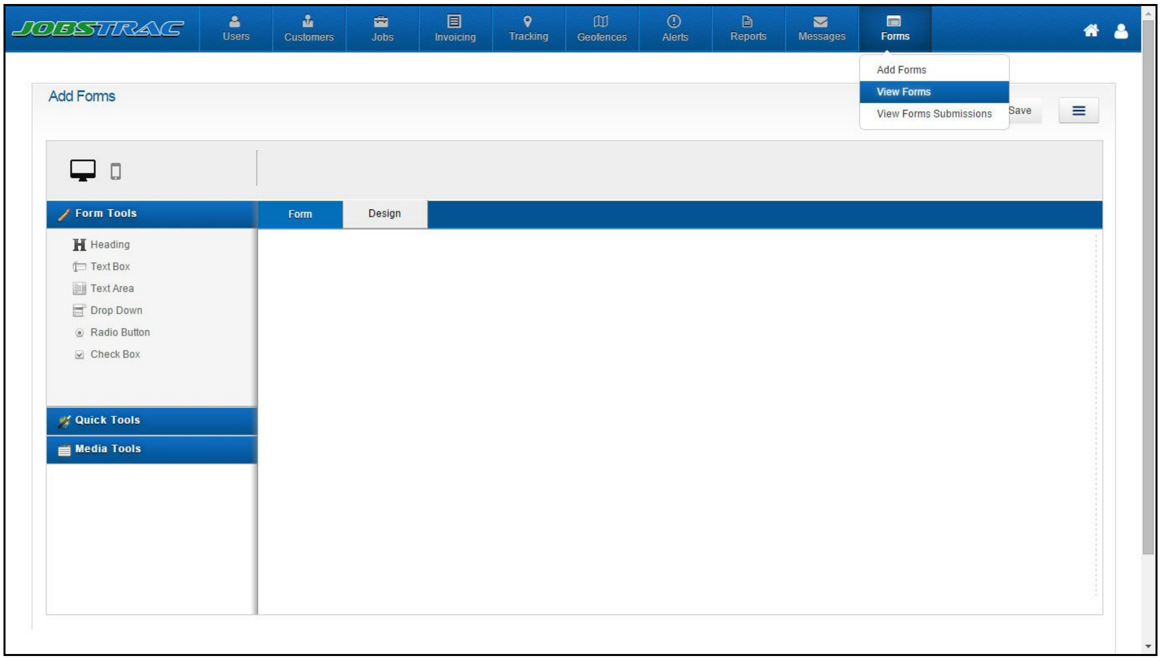


Form will be saved and Manager can click on icons (Refer above screen) to see preview on how the form will appear on phone. Following screen will appear as shown:

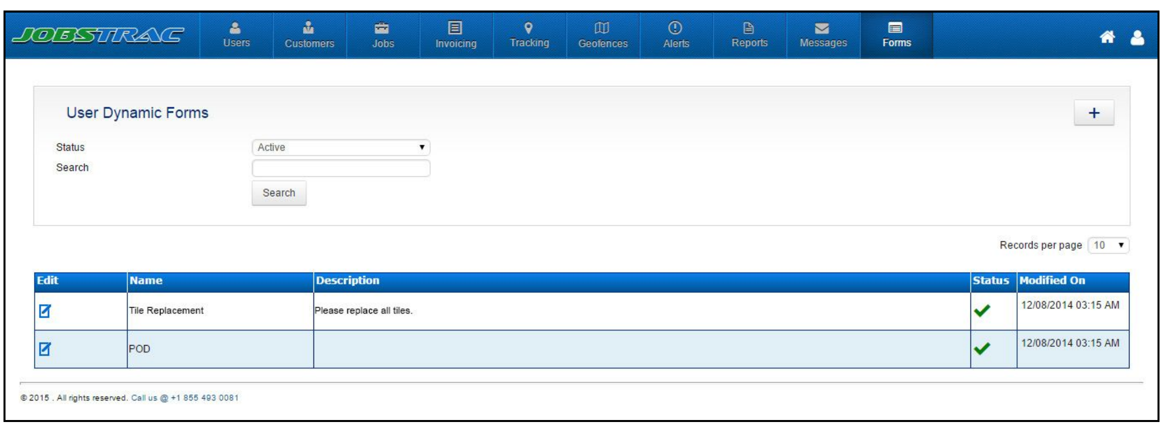


11.2 View Forms

This option allows a Manager to view created forms. Manager will click on **View Forms** from Forms menu as shown:



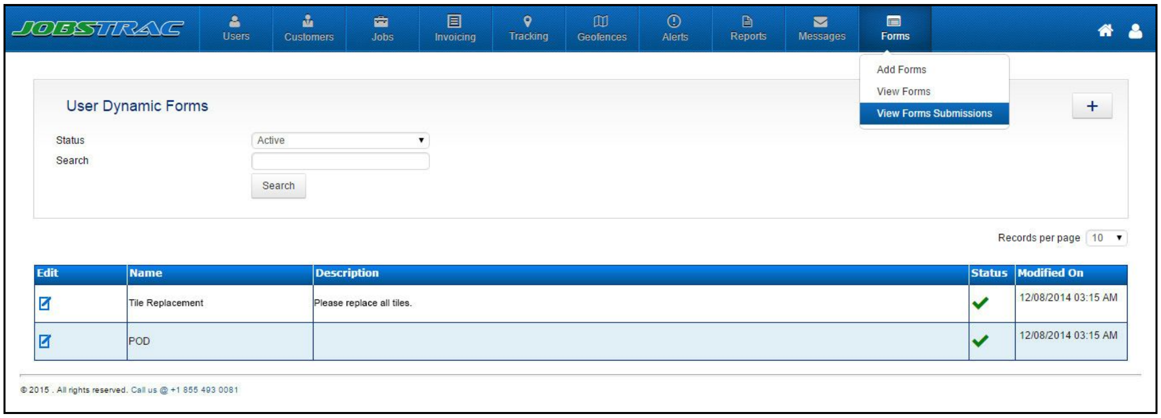
After clicking on View Forms following screen will appear:



This screen will show form details along with their status.

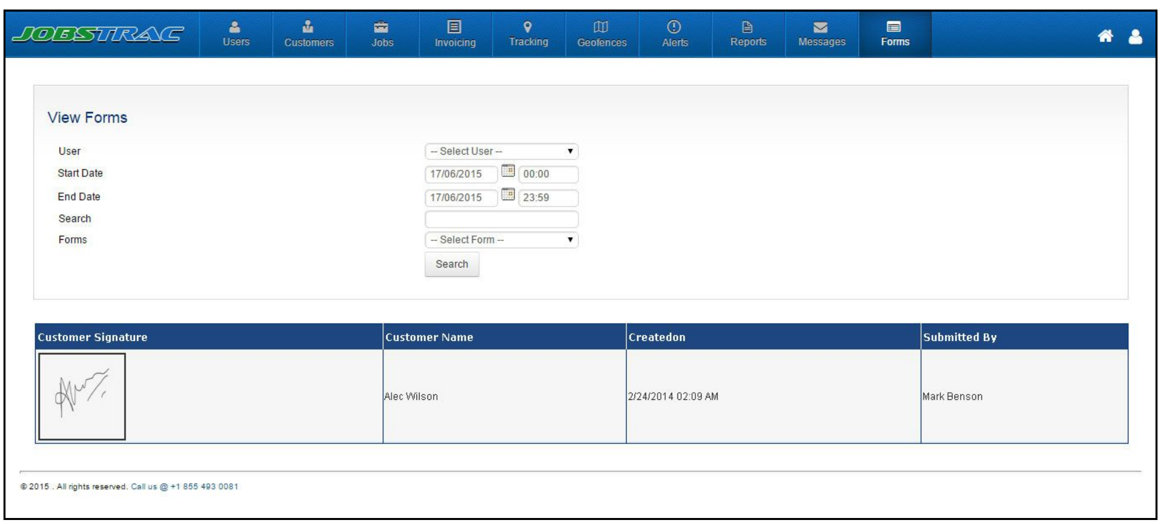
11.3 View Form Submissions

Manager can view details of forms that are submitted by the Field User. For this Manager will select **View Form Submissions** option under Forms menu as shown:



Following screen will appear:

After selecting necessary details submitted forms by Field User will show up as shown:

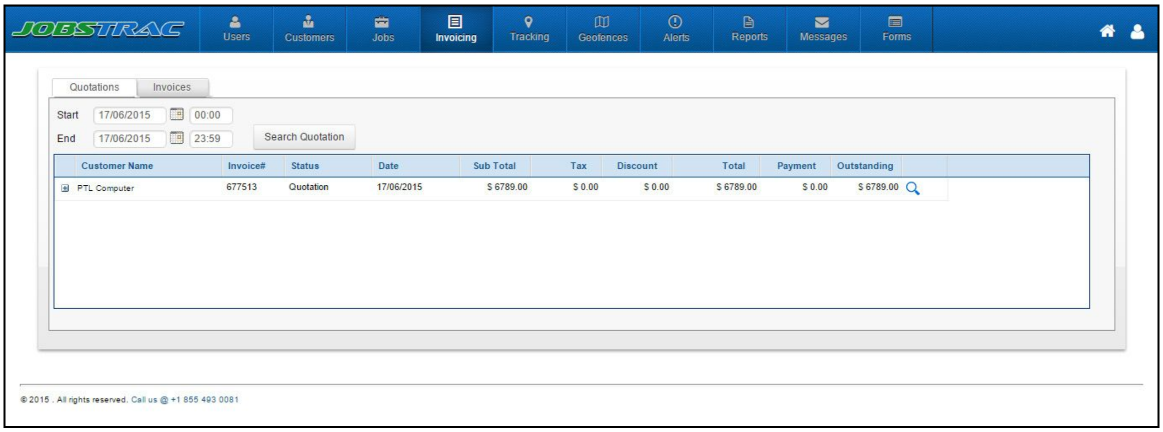


12. Invoicing

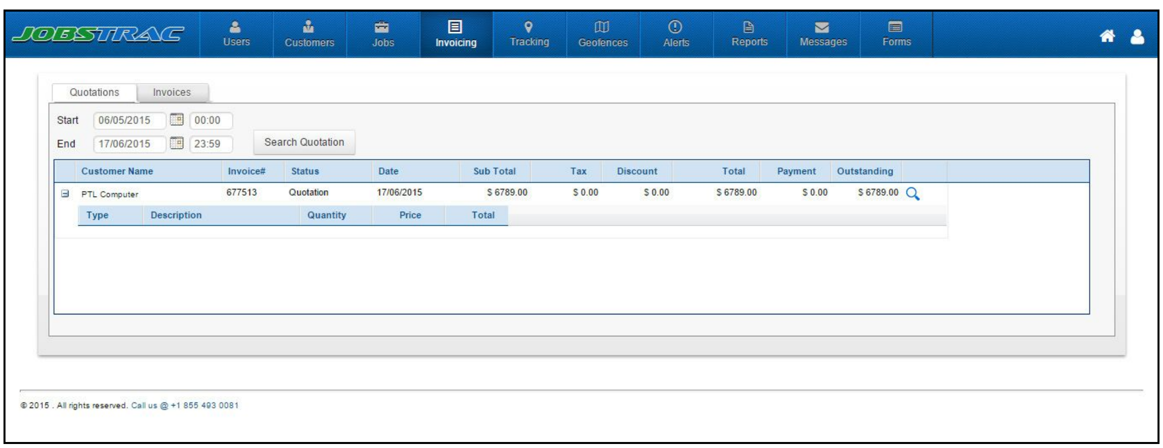
Invoicing allows Manager to view created transactions by the Field User. Manager can then select these transactions to either create quotation or directly create an invoice.

12.1 Quotations

Once the quotation is created it will appear under **Quotations** tad. In order to view quotations Manager will click on **Quotations** tab. Following screen will appear where Manager will be able to view created quotations for current date by default:

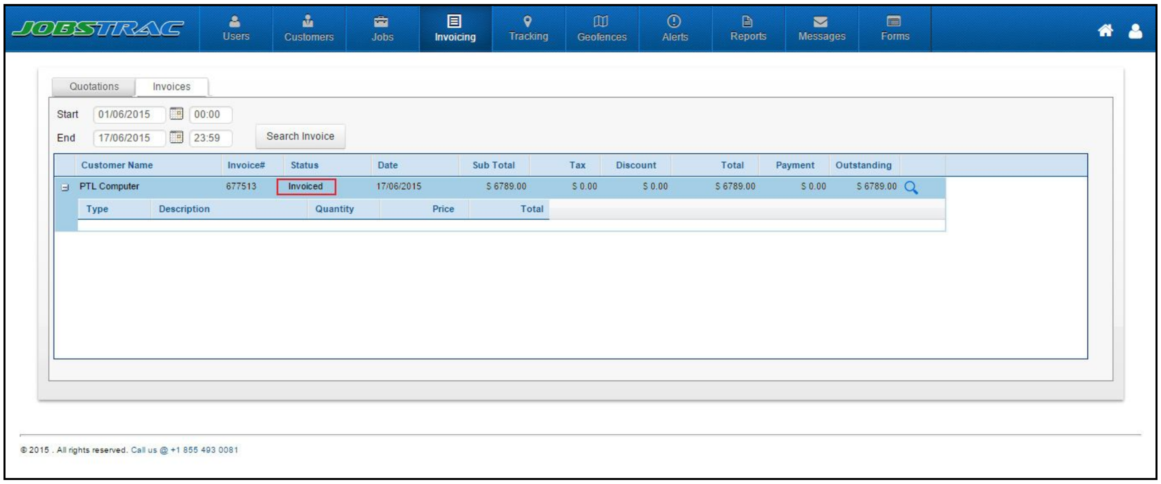


Manager will click on '+' icon to expand the tree and view transactions under the quotation as shown:



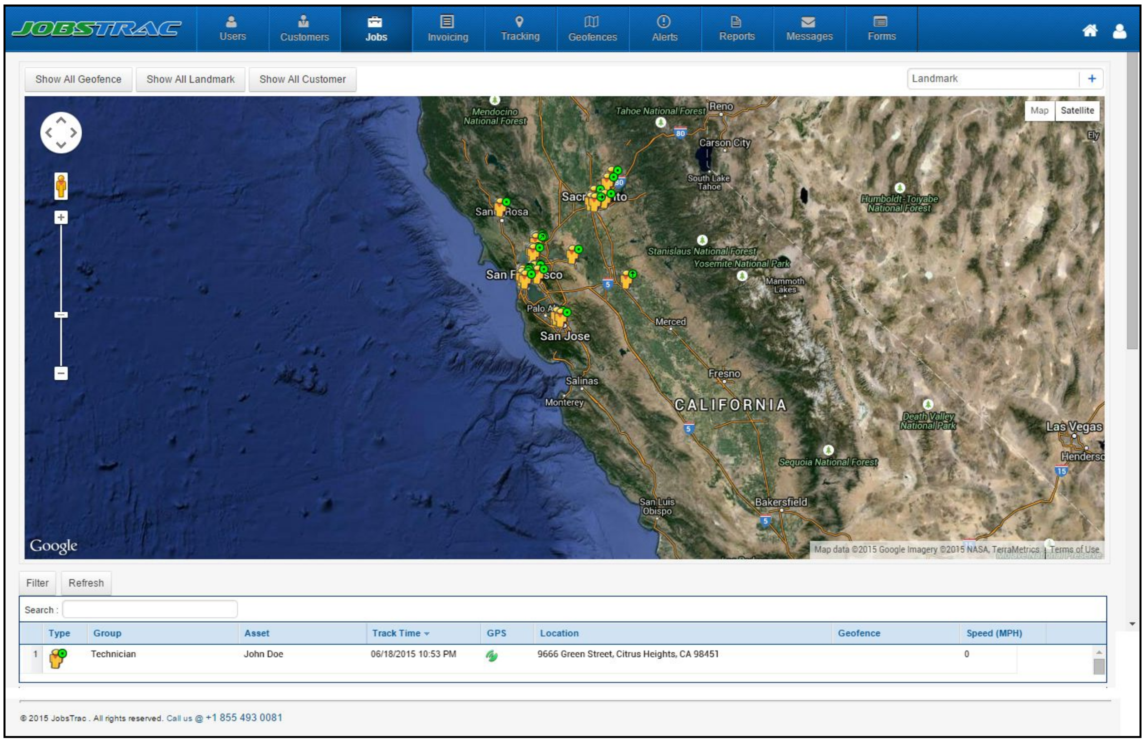
12.2 Invoices

Invoices once created will be visible under Invoices tab. In order to view invoices Manager will click on **Invoices** tab. Created invoices will appear with status **Invoiced** as shown:



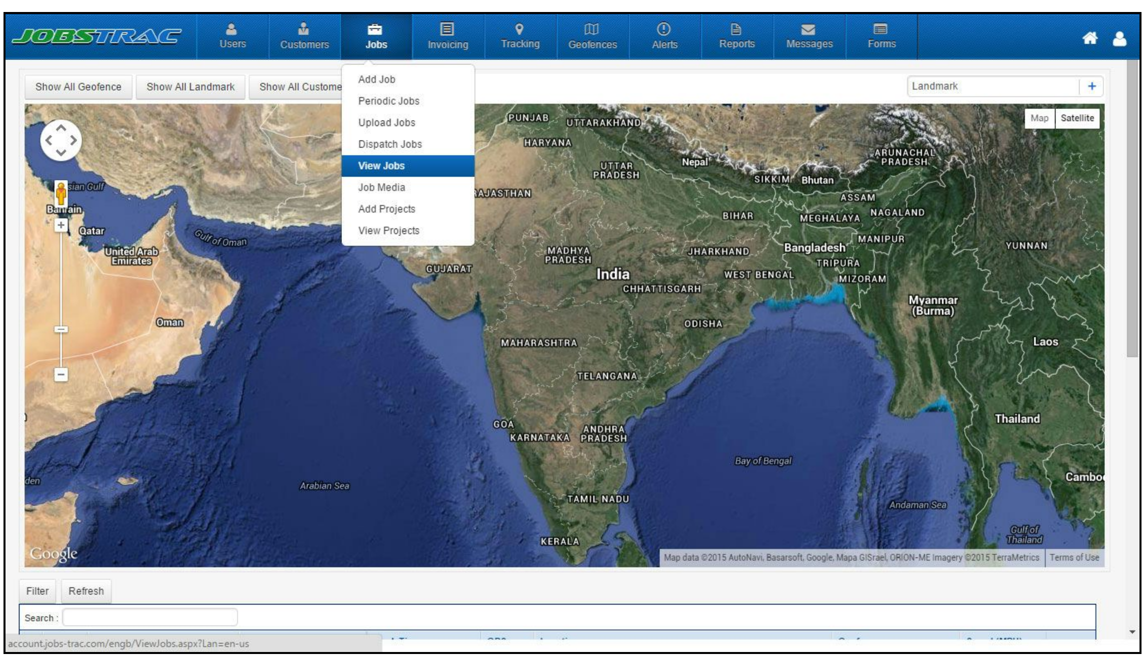
13. Customer Module

Customer can view Job details and manage personal info from the dashboard after login. Following screen shows the Customer's home page after he logs in to the website.

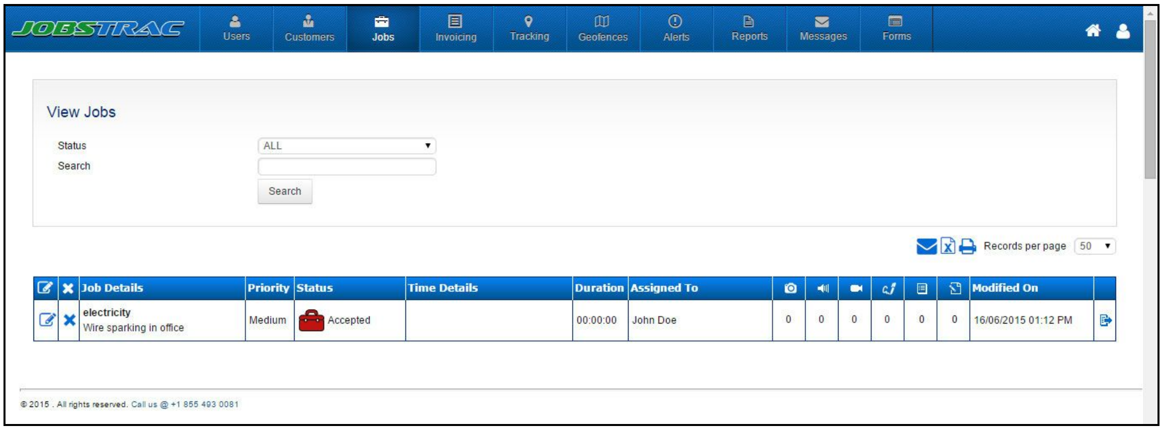


13.1 View Jobs

In order to view assigned Jobs Customer will select View Jobs option under Jobs menu as shown:



Following screen will appear showing Job details with their status:



Customer can also re-assign a Job to a different user if required from this screen.

13.2 Profile

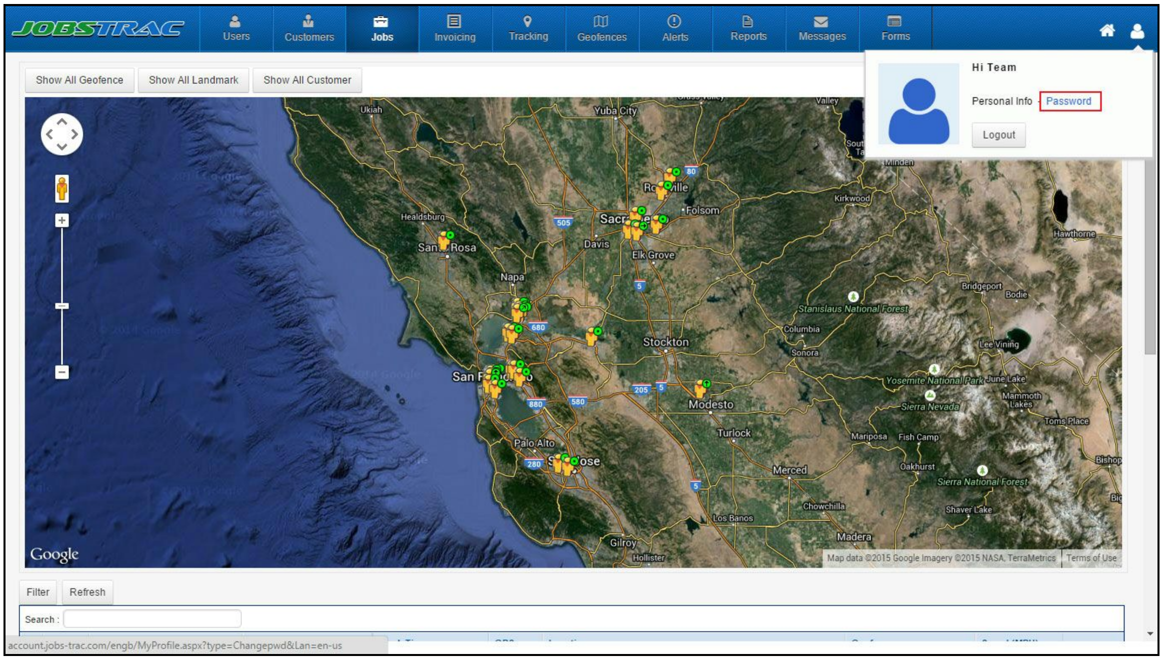
This section allows a Customer to change hi profile settings. This includes the following:

Password
Personal Info

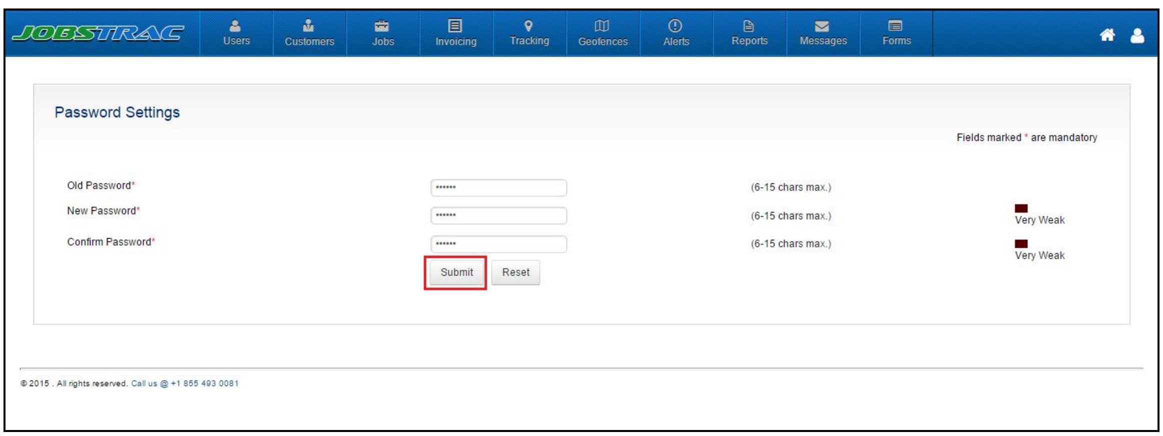
13.2.1 Password

This allows the Customer to change his profile password. In order to change password Customer will click on **Password** option under Profile menu as shown:

After selecting password following screen will appear:

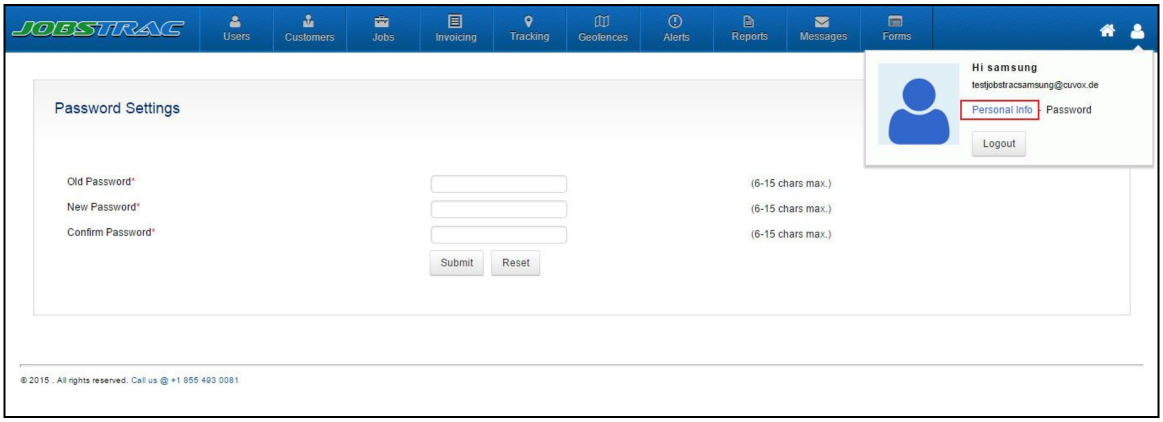


Customer can changed the password and click on **Submit** button. A confirmation message will appear.

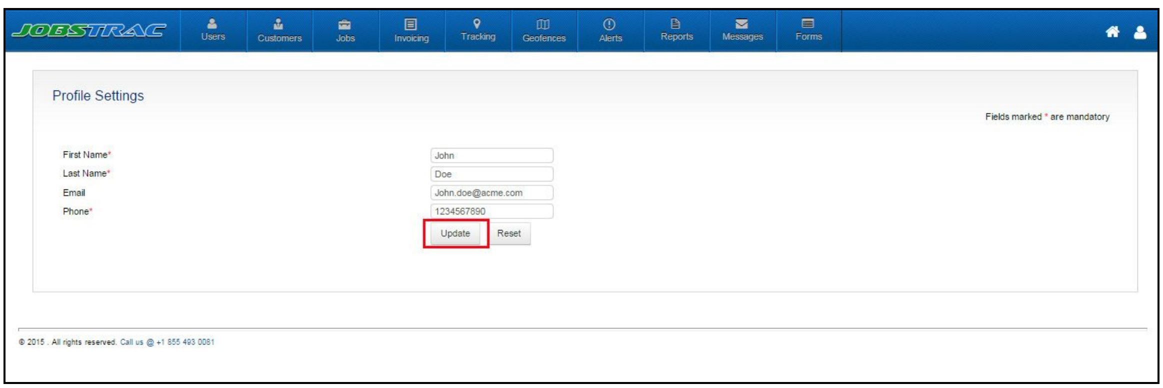


13.2.2 Personal Info

In order to change personal info Customer will select **Personal Info** under Profile menu as shown:



After selecting personal info following screen will appear where Customer can change his details as shown:



After changing details Customer will click on **Update** button. Details will be updated and a confirmation message will appear.

14. Contact Us

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

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