



# Android User Manual

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# About ServiceBridge

ServiceBridge extends the capabilities of the field service management and accounting software into the field to fulfill the vital needs of a modern day service company. Business owners can now spend more time growing their businesses and less time managing them with features that automate work order distribution, map job locations and provide driving directions, enable access to pricing schedules, simplify the process of storing and collecting photos and signatures, and allow the creation of new work orders.

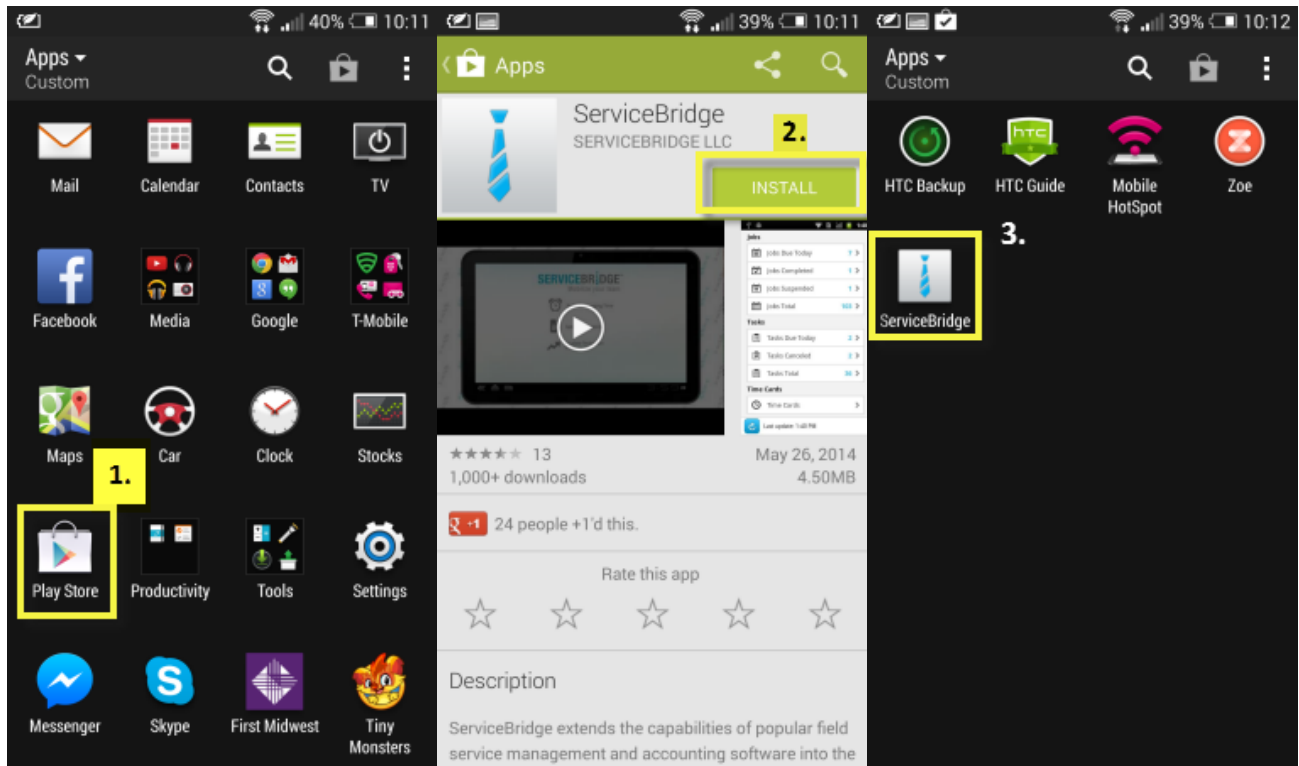
Companies in the United States, Canada, United Kingdom, and Australia use ServiceBridge as a part of their day-to-day business operations. Our customer base consists of businesses in various service industries such as cleaning, delivery, landscaping, communication, pest control, HVAC, construction, plumbing, equipment maintenance, paper shredding, pool maintenance, security, and many more. Business owners have found that by using ServiceBridge they reduce their time spent managing staff, speed up invoicing, escalate technician productivity, and increase customer satisfaction.

When you're in the service industry, being organized, informative and communicative is key to satisfying your clients. As a customer-focused company, we strive to consistently please our clients through operating by the same principles. Whether it's answering your questions, implementing your requested changes or fixing a problem you're having, our goal is to help your business achieve results.

# Getting Started

## Downloading the App

To download the ServiceBridge app you need to go to the play store on your mobile device.

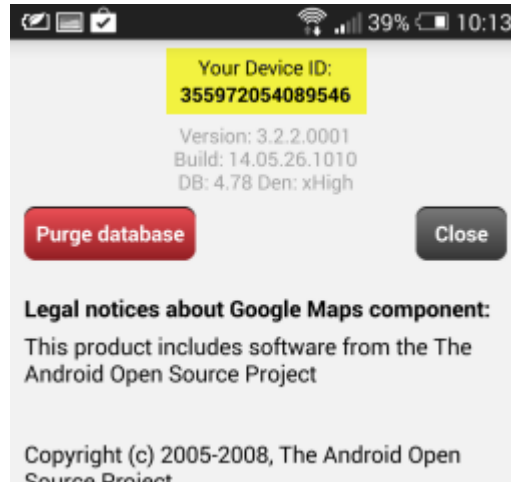


1. Click on Play Store
2. Find the ServiceBridge App and click Install
3. Open up ServiceBridge app

Once installed it will show up on your app list on your phone. To connect your phone to the ServiceBridge application you will first need to find the Device ID and enter it in the Device Settings.

## Locating the Device ID

After you download ServiceBridge app to your Android device. Open the app, and the Device ID will be displayed at the top of the screen.



## Connecting the Mobile device to the ServiceBridge App

Once you found your Device ID you can connect your mobile device to the ServiceBridge application. To begin you need to log in to your Servicebridge.com account.

Log In

Email address

Password

☐ Remember me [I forgot my password](#)

**LOG IN**

After you log in it will take you into your ServiceBridge Portal where you can access your device settings and configure your device.

The screenshot shows the ServiceBridge portal interface. At the top, the ServiceBridge logo is on the left, and navigation links (ABOUT US, BLOG, CONTACT US, SUPPORT, MY SERVICE PORTAL, LOGOUT) are on the right. Below the logo, the tagline "Mobilize your team" is displayed. The main navigation bar includes "Account Summary" (highlighted with a yellow box and labeled 1.), "Job Photos", "Job Documents", "Knowledge Base", "Geo-Tracking", and "Status: Active". On the left sidebar, "Overview" is the main category, and "Devices" (highlighted with a yellow box and labeled 2.) is selected. Below "Overview" are links for "Subscription", "Users", "Employees", and "Settings". The main content area displays a table titled "DEVICES" with columns for "DEVICE NAME", "ASSIGNED TO", and "STATUS". The table lists four devices: "Iphone 1" (Team 1, Active), "Android 1" (Team 2, Active), "iPad" (Team 4, Active), and "HTC" (Team 4, Active). At the bottom of the table, there is a row for "Enter Device Name" with an "Incomplete" status and an "Edit" button (highlighted with a yellow box and labeled 3.).

DEVICE NAME	ASSIGNED TO	STATUS
Iphone 1	Team 1	Active
Android 1	Team 2	Active
iPad	Team 4	Active
HTC	Team 4	Active
Enter Device Name		Incomplete

1. Click on Account Summary
2. Devices
3. Edit

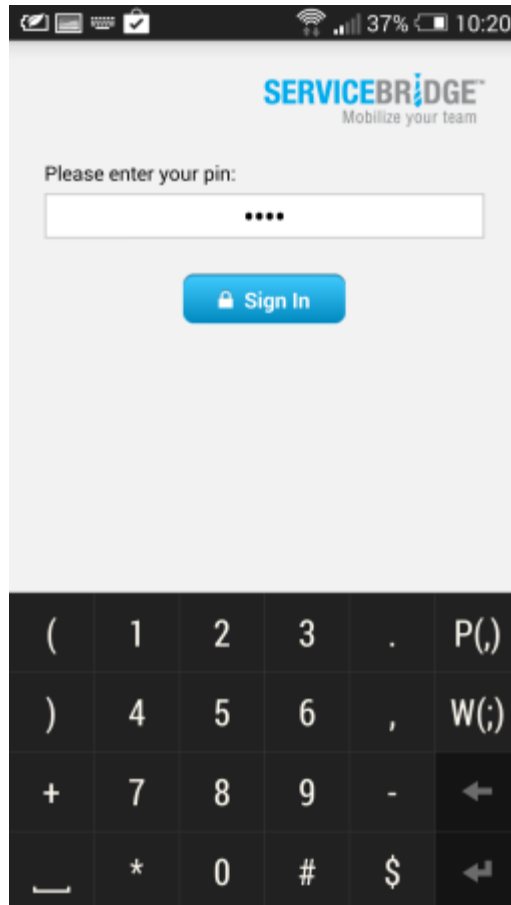
The screenshot shows the "EDIT DEVICE DETAILS" form. It has a title bar with a close button. The form contains four numbered steps: 1. "Device name" (text input field), 2. "ID" (text input field with a "Where to find?" link), 3. "Team" (radio button selection for "Team", "Employee", or "Sales Rep", with a dropdown menu showing "Team 1"), and 4. "PIN (?)" (text input field with "0" entered).

1. Enter the Device name
2. Enter the Device ID the exact same way it shows (Including dashes)
3. Assign the Team that will be using this device
4. Enter a Pin so the team can log into the app

Once all the information is put in and the device settings selected, click save and your device will now be synced to the ServiceBridge portal.

## Signing in using the PIN

After you connect your device with the Device ID you will open up the app and it will ask you to enter the PIN number that you assigned for that device.



Enter the PIN and click Sign In.

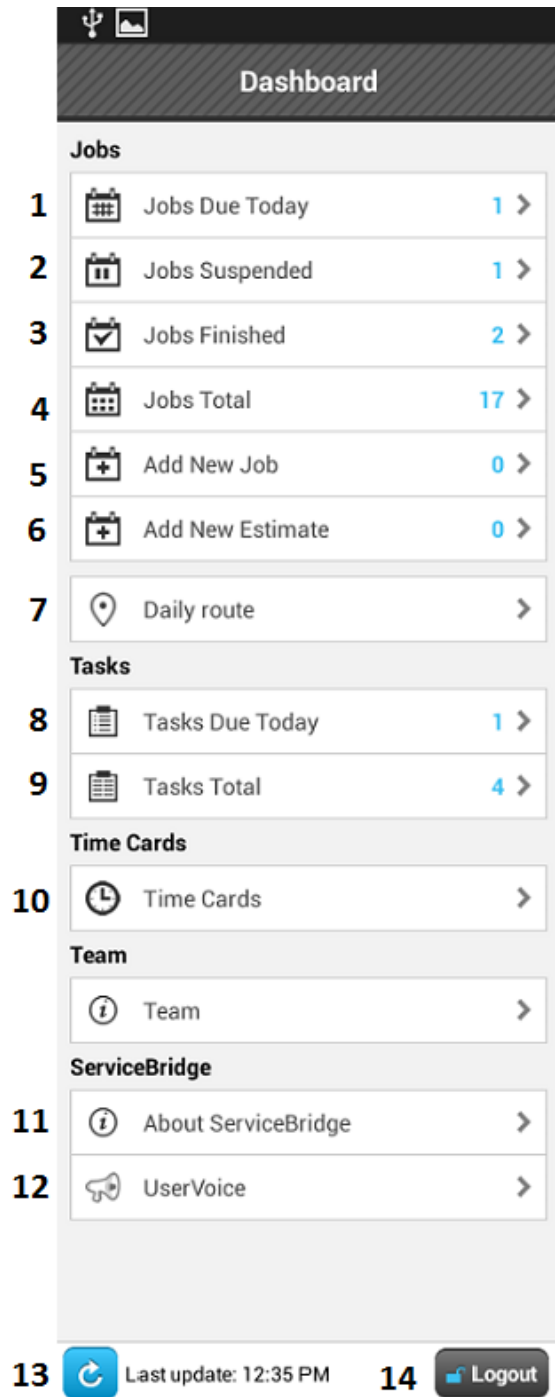
Once signed in, your ServiceBridge app will open up your Dashboard where you can begin adding jobs, estimates, and all of the other features of the ServiceBridge application.



# The Basics

## Dashboard Overview

After signing in to your ServiceBridge app you will see what is called the Dashboard. From the Dashboard you can begin using the features that ServiceBridge offers.



1. Jobs Due Today - You can view all of the jobs due today.

2. Jobs Suspended - You can view all of the jobs that have been suspended.

3. Jobs Finished - You can view all of the finished jobs today.

4. Jobs Total - You can view all of your jobs past, present, and future.

5. Add New Job - You can add a new job.

6. Add New Estimate - You can add a new estimate.

7. Daily Route - You can view all of your job locations and fastest routes.

8. Tasks Due Today- You can view all of your task that need to be done today.

9. Tasks Total - You can view all of your tasks past, present, and future.

10. Time Cards - You can view your time cards here.

11. About ServiceBridge - You can view your Device ID and read about or app.

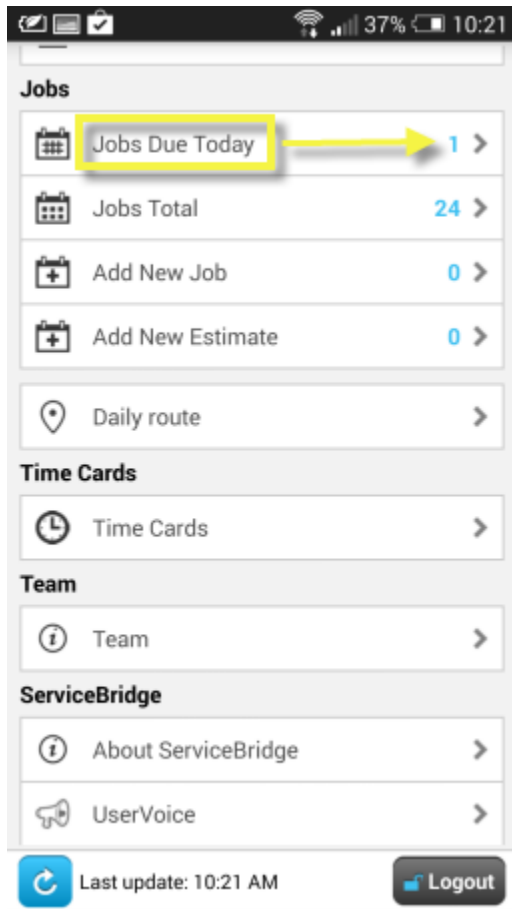
12. UserVoice - You can leave your feedback and support for ServiceBridge

13. Refresh Button - The refresh button allows you to re-sync with your ServiceCEO database.

14. Logout Button - Logs you out of the app.

## Jobs Due Today

The Jobs Due Today tab allows you to see all of what is planned for the day. All of your jobs, estimates, and projects will be displayed here for that current day. From there you can click on each specific job and see the job in further detail.

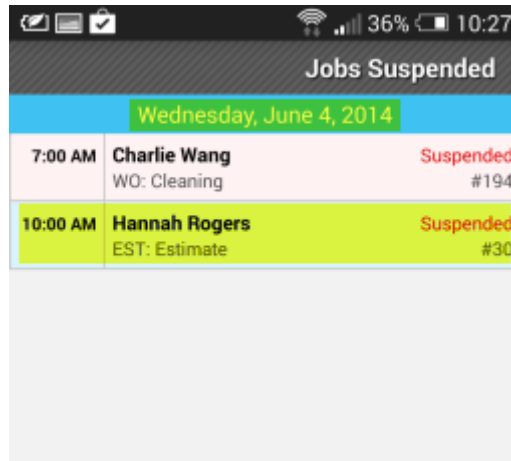
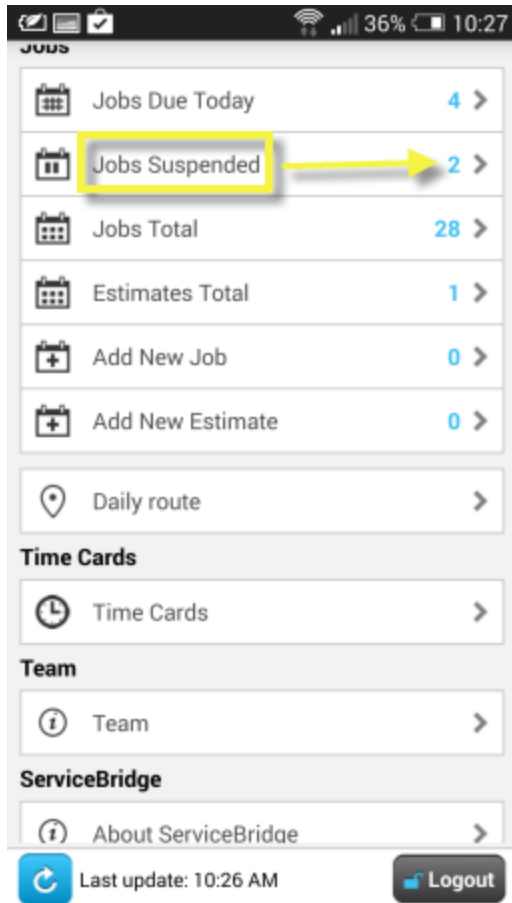


Jobs Due Today		
Wednesday, June 4, 2014		
7:00 AM	<b>Charlie Wang</b> WO: Cleaning Duration: 2.0h	Assigned #194 Total: \$96.53
8:00 AM	<b>David Breighner</b> WO: Cleaning Duration: 1.5h	Assigned #49 Total: \$143.75
10:00 AM	<b>Hannah Rogers</b> EST: Estimate Duration: 0.5h	Assigned #30 Total: \$311.90
11:00 AM	<b>Bryan Fuller</b> WO: Cleaning Duration: 0.5h	Assigned #417 Total: \$107.25
1:00 PM	<b>Kyle Johnson</b> WO: Cleaning Duration: 0.5h	Assigned #695 Total: \$0.00
5:00 PM	<b>Mary Smith</b> WO: Cleaning Duration: 1.0h	Assigned #645 Total: \$0.00
Duration: 6.0h		Total: \$659.43

Once you click on Jobs Due Today it will take you to the Active Jobs page. It will display the Date, Each Job, Duration, and the Total made from all of the jobs.

## Jobs Suspended

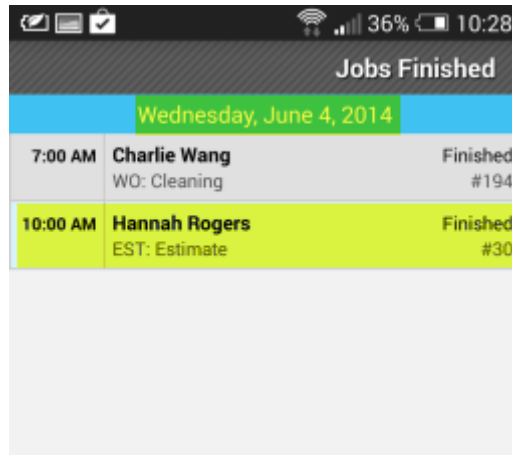
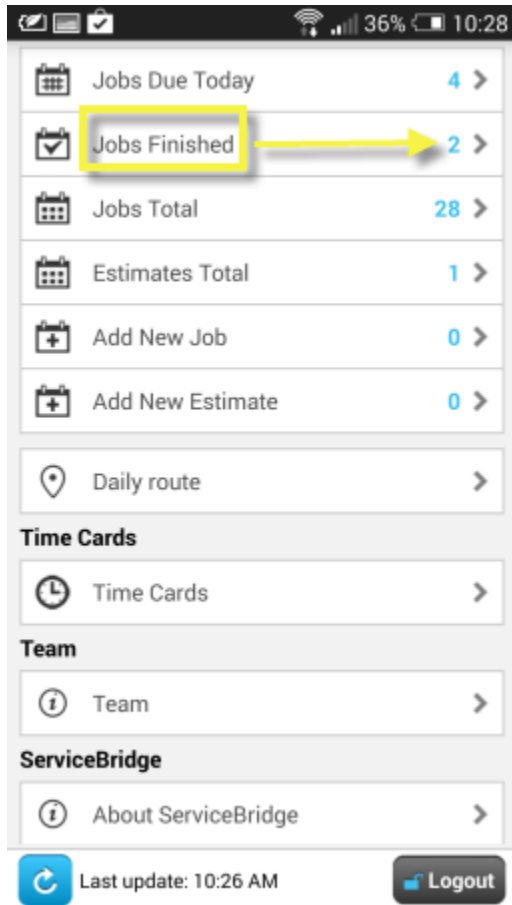
The Jobs Suspended tab lets you view all of the Jobs that have been suspended for that day. If you click on the specific job you can see for what reason that job was suspended.



In the Suspended Jobs you can see the date and the specific job that was suspended.

## Jobs Finished

The Jobs Finished tab allows you to view all of the jobs that you have completed so far in the day. Once the job is completed it will show up here.



In the Finished Jobs you can see the date and the specific job that was finished. By clicking on each job further details about the job will open up.

## Jobs Total

In the Jobs Total tab you can view all of your jobs past, present, and future and filter which jobs you would like to see.

The left screenshot shows the 'Jobs Total' tab selected in the sidebar menu. The right screenshot shows the 'Jobs Total' view with a 'Filter' button highlighted in the top right corner. A blue arrow points from the 'Filter' button to the filter dialog box shown in the third screenshot.

Tuesday, May 13, 2014		
1:00 PM	<b>Kelly Walker</b> WO: Cleaning Duration: 0.75h	Assigned #439 Total: \$134.50
5:00 PM	<b>Corey Sutton</b> WO: New Bathroom Duration: 0.75h	Assigned #616 Total: \$1,161.80
	<b>Duration: 1.5h</b>	<b>Total: \$1,296.30</b>

Thursday, May 15, 2014		
11:00 AM	<b>Bryan Fuller</b> WO: Cleaning Duration: 0.5h	Assigned #413 Total: \$107.25
	<b>Duration: 0.5h</b>	<b>Total: \$107.25</b>

Friday, May 16, 2014		
9:00 AM	<b>Joe Billings</b> WO: Cleaning Duration: 0.25h	Assigned #250 Total: \$107.25
1:00 PM	<b>Kelly Walker</b> WO: Cleaning Duration: 0.75h	Assigned #440 Total: \$134.50
	<b>Duration: 1.0h</b>	<b>Total: \$241.75</b>

Sunday, May 18, 2014		
6:00 PM	<b>Bryan Fuller</b>	Assigned

In your all jobs tab if you click Filter in the top right corner you can filter what you will see.

Select jobs to view

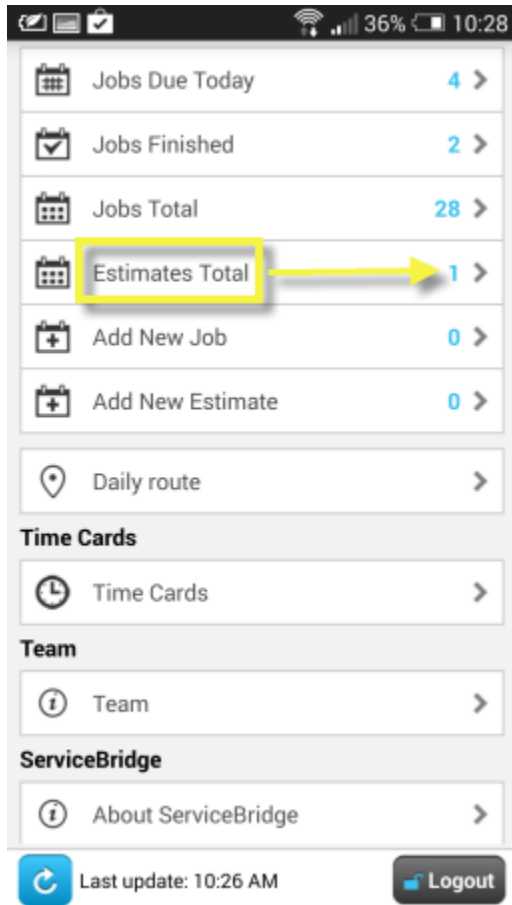
- ☒ Assigned
- ☒ In Progress
- ☒ Finished
- ☒ Suspended

Close Ok

You can select from Assigned, In Progress, Finished, or Suspended jobs that will be visible.

## Estimates Total

In Estimates Total you are able to view all of the Estimates that you have from the past, present, and future.



The screenshot shows the 'Estimates Total' screen. At the top, there's a status bar with signal, Wi-Fi, and battery icons, and the time 10:32. Below the status bar is a header with 'Estimates Total' and a 'Filter' button. The main content is a list of estimates, grouped by date. The first group is for 'Wednesday, June 4, 2014', which includes three estimates: '9:00 AM Hannah Rogers EST: Estimate Assigned #31', '10:00 AM Hannah Rogers EST: Estimate Finished #30', and '12:00 PM Joe Billings EST: New Pipes Assigned #8'. The second group is for 'Sunday, June 8, 2014', which includes one estimate: '9:00 AM Hannah Rogers EST: Estimate Assigned #31'. The third group is for 'Tuesday, June 10, 2014', which includes one estimate: '12:00 PM Kelly Walker EST: Bathroom Remodeling Assigned #9'. The bottom of the screen is a light gray area.

Estimates Total		
Wednesday, June 4, 2014		
9:00 AM	Hannah Rogers EST: Estimate	Assigned #31
10:00 AM	Hannah Rogers EST: Estimate	Finished #30
12:00 PM	Joe Billings EST: New Pipes	Assigned #8
Sunday, June 8, 2014		
9:00 AM	Hannah Rogers EST: Estimate	Assigned #31
Tuesday, June 10, 2014		
12:00 PM	Kelly Walker EST: Bathroom Remodeling	Assigned #9

In All Estimates you can view and click on each Estimate for more detail and see what was done or what will need to be done.

## Tasks

Tasks can be added through each job or estimate. Once a task is created it will show up in tasks and will need to be changed to “completed” for it to go away. Tasks can also be created through ServiceCEO.

The first screenshot shows the main menu of the ServiceCEO mobile app. The 'Tasks' section is highlighted with a yellow box, showing 'Tasks Due Today' (1) and 'Tasks Total' (4). The second screenshot shows a calendar view of tasks for June 4-10, 2014. The third screenshot shows the detailed view of a task titled 'Task'.

You can change the status

Write any notes for the task

**Task**

Status: **Active** [Change](#)

Due: **Jun 4, 2014 12:25 PM**  
Duration: **120 min**

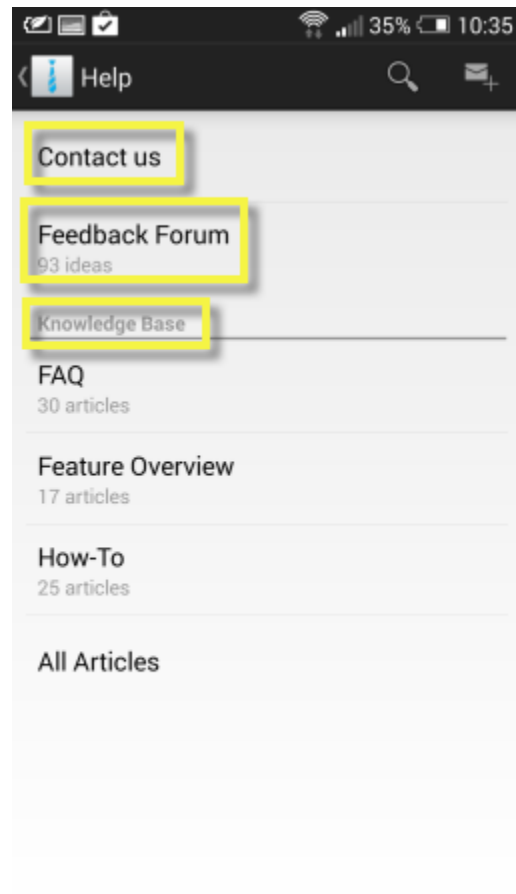
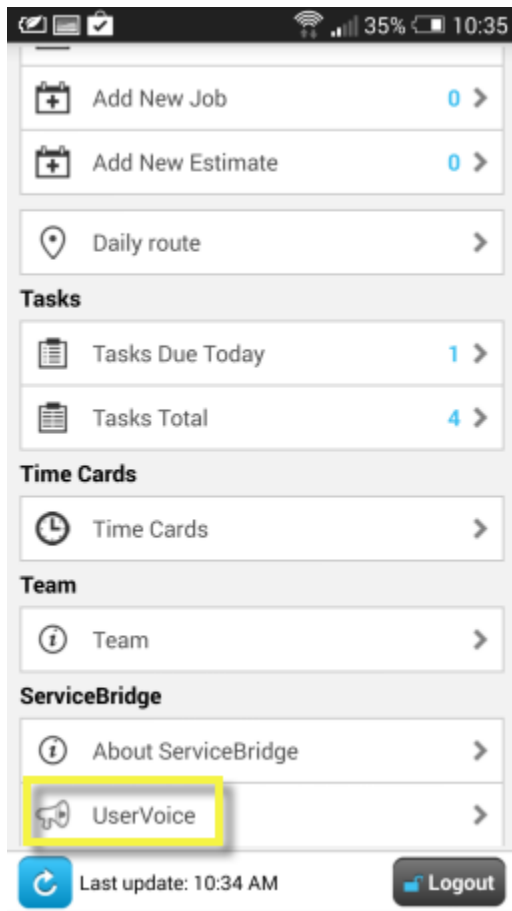
Contractor: **administrator**

**Cleaning**

General Notes

## UserVoice

UserVoice allows you to post an idea you have to improve the ServiceBridge experience for our customers, contact us if you have any problems or questions, and the feedback forum where you can read new feature suggestions other ServiceBridge users have posted.

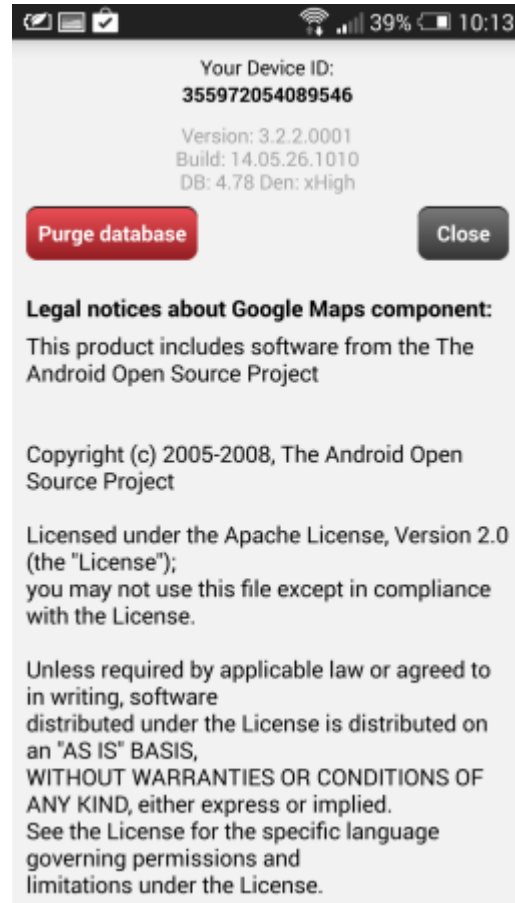
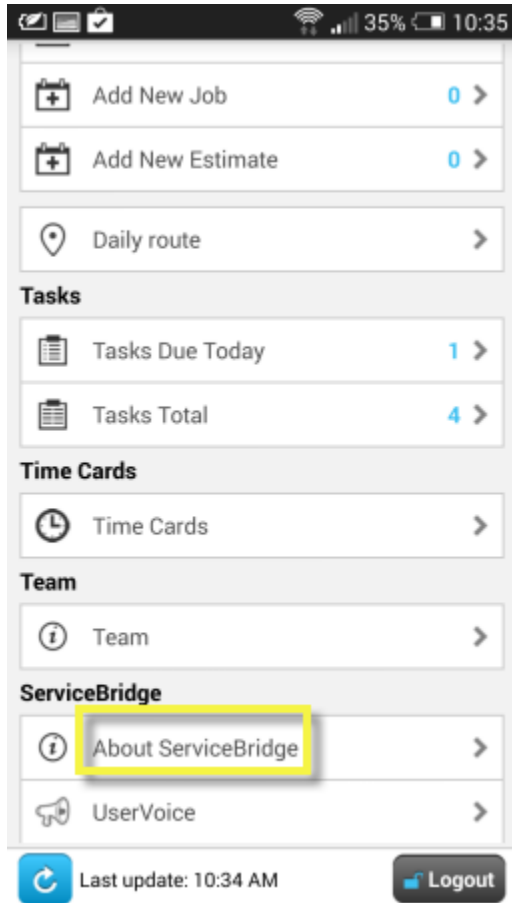


From the Dashboard if you scroll down and select UserVoice it will take you to where you can contact us, read the feedback forum by posting new ideas or voting on what others have suggested, and read the knowledge base. The feedback forum also allows you to vote on what others have suggested.



## About ServiceBridge

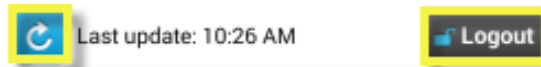
About ServiceBridge lets you access your Device ID, Subscribe via App Store, and Restore purchased subscription.



## Refresh and Logout

### Refresh

The Refresh button allows you to re-sync any changes you have made which will allow you to gather data from the ServiceCEO database and send it to the database from the ServiceBridge app.



### Logout

The Logout button allows you to log out of the application and will ask you to enter the PIN number again in order to access the application again.

# Supervisor Role

## Description

Supervisor Role is a tool to manage team performance while still working in the field. The feature allows supervisors to view multiple team schedules 7 days back and 30 days in advance. Supervisors can reschedule jobs or reassign work orders to other teams. Operation managers can administer which teams the supervisor has access to. Work order status is displayed in the supervisor job list to provide a summary of daily or weekly job performance.

Supervisor Role allows you to make any changes you wish to your jobs while you are in the field. You don't have to be at a computer with ServiceCEO open to make these changes. Once a change is made with Supervisor Role it is submitted and synced with ServiceCEO.

## Enabling Supervisor Role

To enable Supervisor Role for your device you will need to log in to the Service Portal on your web browser.

The screenshot shows the ServiceBridge web portal interface. At the top, the ServiceBridge logo is on the left, and navigation links (ABOUT US, BLOG, CONTACT US, SUPPORT, MY SERVICE PORTAL, LOGOUT) are on the right. Below the logo, the tagline 'Mobilize your team' is visible. The main navigation bar includes 'Account Summary' (highlighted with a yellow box and labeled '1.'), 'Job Photos', 'Job Documents', 'Knowledge Base', 'Geo-Tracking', and 'Status: Active'. On the left sidebar, 'Overview' is selected, and 'Devices' is highlighted with a yellow box and labeled '2.'. The main content area displays a table titled 'DEVICES' with columns for 'DEVICE NAME', 'ASSIGNED TO', and 'STATUS'. The table lists four devices: 'Iphone 1' (Team 1, Active), 'Android 1' (Team 2, Active), 'iPad' (Team 4, Active), and 'HTC' (Team 4, Active). Each row has an 'Edit' link. At the bottom of the table, there is an 'Enter Device Name' row with an 'Incomplete' status and an 'Edit' link (highlighted with a yellow box and labeled '3.'). The footer contains copyright information for ServiceBridge LLC and a credit to Chicago Web Design by DevBridge.

DEVICE NAME	ASSIGNED TO	STATUS
Iphone 1	Team 1	Active
Android 1	Team 2	Active
iPad	Team 4	Active
HTC	Team 4	Active
Enter Device Name		Incomplete

1. Go to Account Summary
2. Devices
3. Select the device you want to Edit

After you click Edit a window will pop-up with the Device Settings. You need to scroll down until you see Supervisor Role.

**Supervisor Role**

1 ☒ Enable Supervisor Role (?)

Select Teams:  
[Select all](#) | [Deselect all](#)

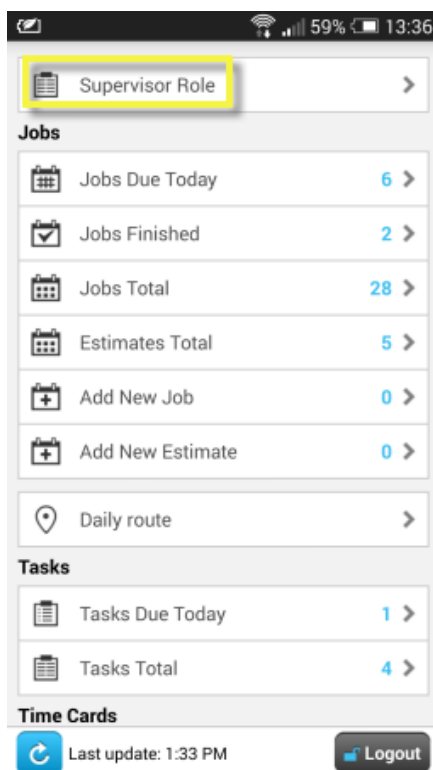
2 ☒ Team 1  
☒ Team 2  
☒ Team 3  
☒ Team 4  
☒ Team 5

3 **SAVE** CANCEL

1. Click Enable Supervisor Role.
2. And select which teams Supervisor Role will be allowed to see and change.
3. Click Save

## Accessing Supervisor Role View

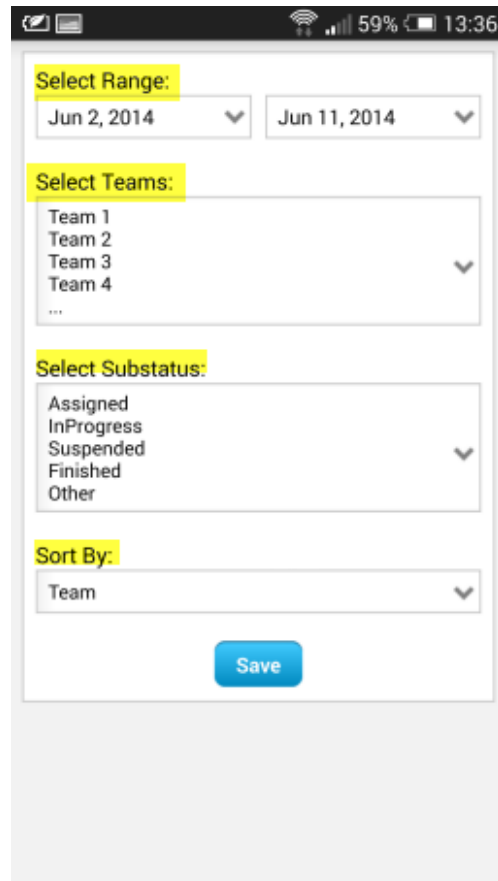
Once Supervisor Role is enabled from your Service Portal you will be able to view the feature from your mobile app. Open up you dashboard and it will be the first thing on the top.



Saving screenshot...

Supervisor Role		Filter
12:43 PM	<b>Bryan Fuller</b> WO: Cleaning	InProgress #417
1:00 PM	<b>Kyle Johnson</b> WO: Cleaning	Assigned #695
5:00 PM	<b>Mary Smith</b> WO: Cleaning	Assigned #645
Team 5 - Jun 6, 2014		
1:00 PM	<b>Kelly Walker</b> WO: Cleaning	Assigned #447
Team 5 - Jun 7, 2014		
9:00 AM	<b>Kelly Walker</b> WO: Cleaning	Assigned #71
Team 5 - Jun 8, 2014		
9:00 AM	<b>Hannah Rogers</b> EST: Estimate	Assigned #31
Team 5 - Jun 9, 2014		
11:00 AM	<b>Bryan Fuller</b> WO: Cleaning	Assigned #418
1:00 PM	<b>Kelly Walker</b> WO: Cleaning	Assigned #448
Team 5 - Jun 10, 2014		
12:00 PM	<b>Kelly Walker</b> EST: Bathroom Remodeling	Assigned #9

Once you open up supervisor role you can click **Filter** on the top right hand corner to filter what teams, dates or jobs you wish to see.



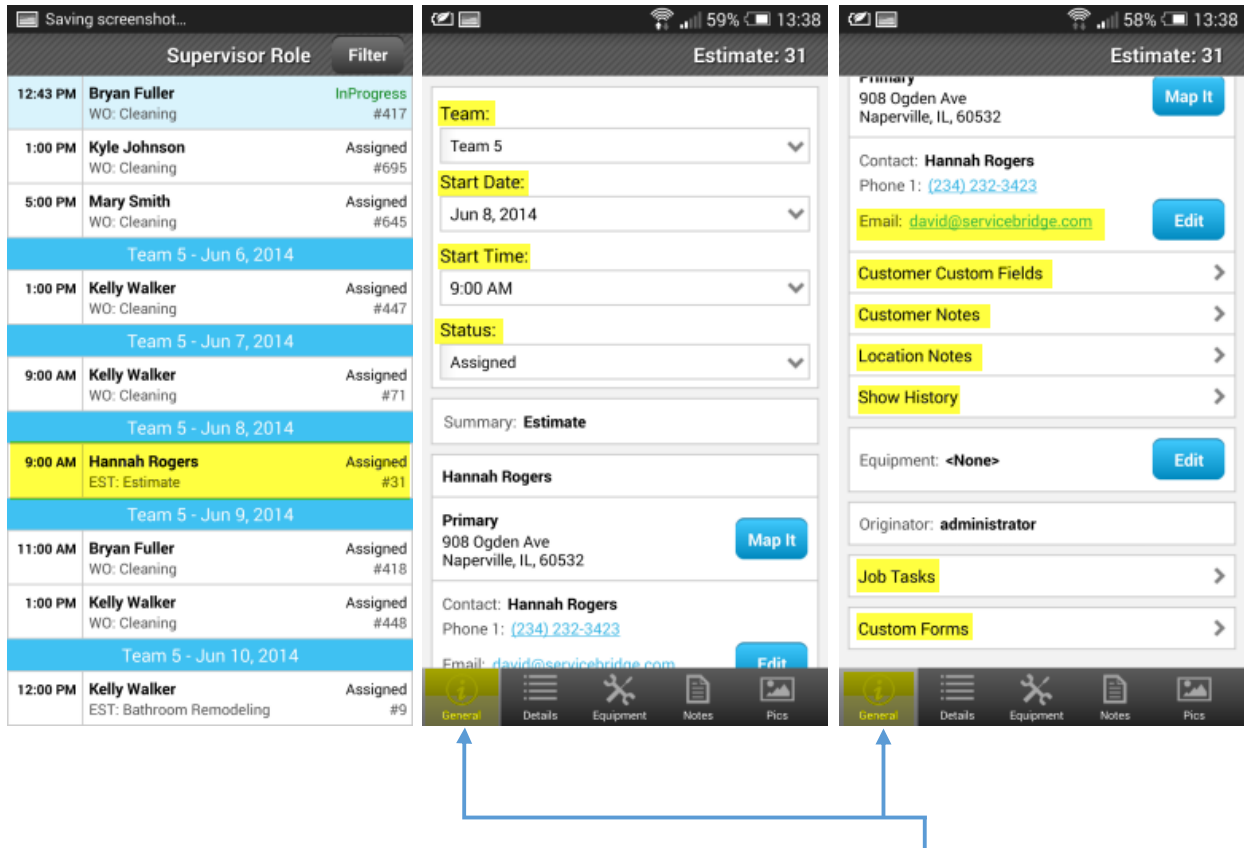
The image shows a mobile application interface for filtering data. At the top, there is a status bar with icons for signal, Wi-Fi, 59% battery, and the time 13:36. Below this, the filter interface is contained within a white box with a grey border. It features four sections, each with a yellow header: 'Select Range:' with two date pickers (Jun 2, 2014 and Jun 11, 2014), 'Select Teams:' with a list of Team 1, Team 2, Team 3, Team 4, and an ellipsis, 'Select Substatus:' with a list of Assigned, InProgress, Suspended, Finished, and Other, and 'Sort By:' with a dropdown menu currently set to 'Team'. A blue 'Save' button is positioned at the bottom of the filter box.

From the supervisor role filter you can select which **Range**, **Teams**, and **Substatus** you would like to view. You can also select the sort order by Date, Team, or Substatus.

# Making Changes

## General Tab

Once you find a job you can begin to make changes that are needed for a specific job or estimate.



From any specific job you can select one and it will open up the **General Tab** of the job. From the General Tab you can edit:

1. The team the job is assigned to
2. The Start Date
3. The Start Time
4. The Status
5. Edit the Email
6. Customer Custom Fields
7. Customer Notes
8. Location Notes
9. Show History
10. Job Tasks
11. Custom Forms

1.

Team
Team 1
Team 2
Team 3
Team 4
Team 5

Select the team

4.

Status
<None>
Assigned
InProgress
Suspended
Finished

Assign the status

2.

Sun, Jun 8, 2014		
May	07	2013
Jun	08	2014
Jul	09	2015
Done		

Select the date

5.

Update email address

3.

Set time		
8	59	
9	:	00 AM
10	01	PM
Done		

Set the time

6.

Bryan Fuller

First Time Customer?

Any Pets?

New Address?

Customer Custom Fields

7.

Bryan Fuller

Work Order Private

Customer notes

8.

Bryan Fuller - Primary

Work Order Private

Location notes

9.

Job History		
Monday, June 2, 2014		
4:00 AM	Bryan Fuller WO: Cleaning	Assigned #149
Friday, May 30, 2014		
6:00 AM	Bryan Fuller WO: Cleaning	Assigned #416
4:00 AM	Bryan Fuller WO: Cleaning	Assigned #148
Tuesday, May 27, 2014		
4:00 AM	Bryan Fuller WO: Cleaning	Assigned #147
Sunday, May 25, 2014		
6:00 AM	Bryan Fuller WO: Cleaning	Assigned #415
Saturday, May 24, 2014		
4:00 AM	Bryan Fuller WO: Cleaning	Assigned #146
Wednesday, May 21, 2014		
4:00 AM	Bryan Fuller WO: Cleaning	Finished #145
Tuesday, May 20, 2014		
6:00 AM	Bryan Fuller WO: Cleaning	Assigned #414

Show history

10.

Create New Task

Job tasks

11.

Job: 417 | Custom Forms

6/4/14 12:43:09 PM  
Plumbing Inspection Form

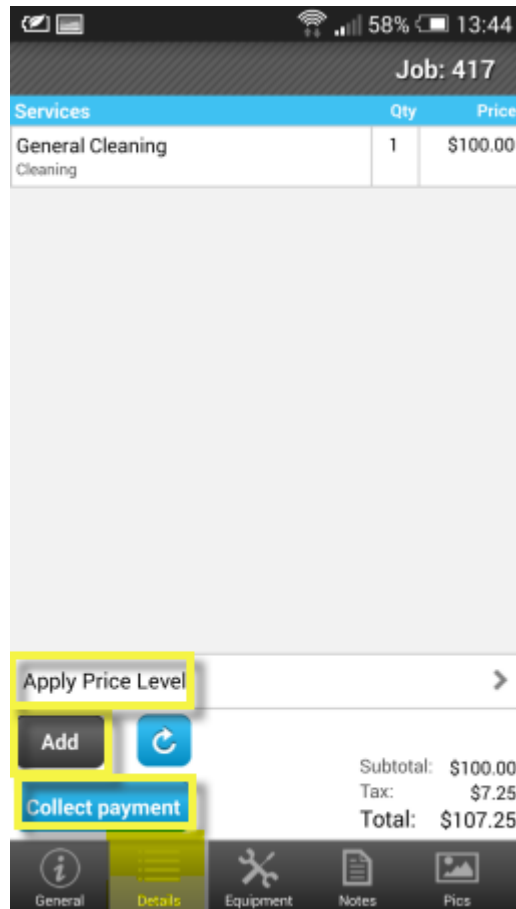
New Form

Custom Forms



## Details Tab

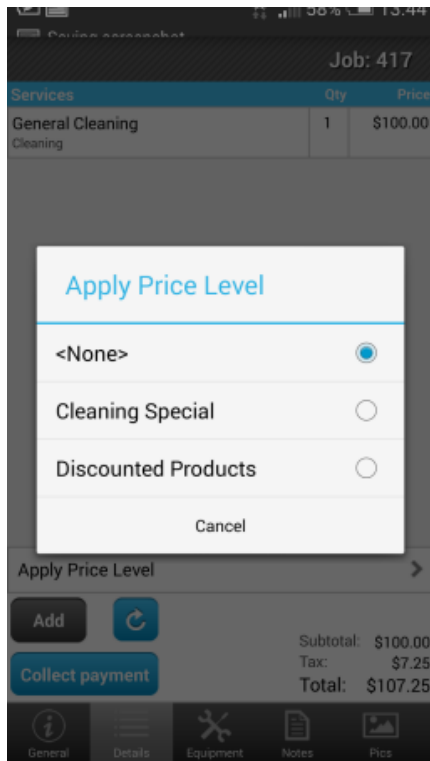
From the details tab you can view and add services, products, and kits as well as the quantity and price for each item. You can also scan a barcode, select price levels, and collect payments from the details tab.



From the **Details Tab** you can view the products, services, and/or kits that are selected for each job. You can also:

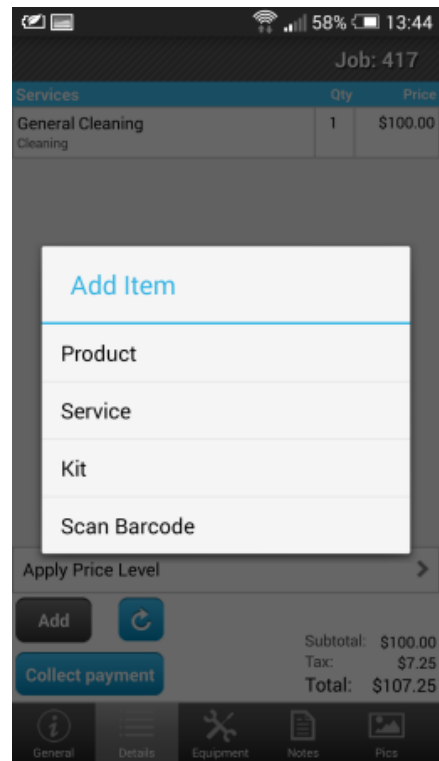
1. Add a Price Level
2. Add a Product/Service/Kit
3. Collect Payment

1.



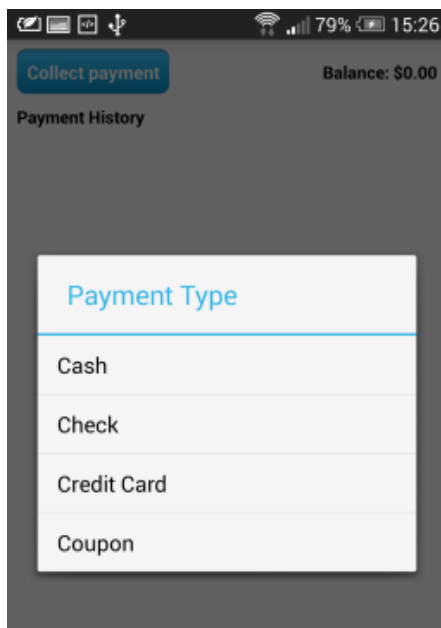
**Apply price level**

2.



**Add item**

3.



**Collect payment**

## Equipment Tab

Let's you view all of the equipment that has been installed or replaced for that specific job. It also lets you add any additional equipment as need be.

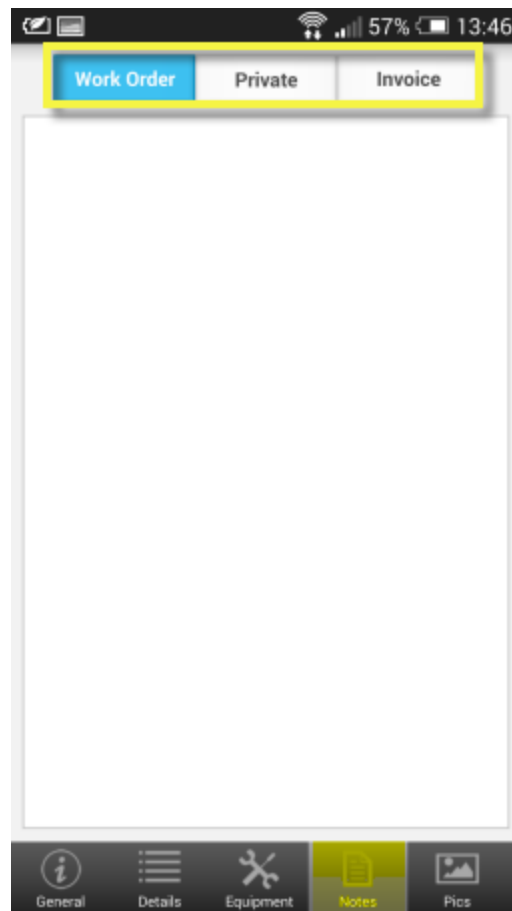
The left screenshot shows the 'Job: 417' screen. At the top, it says 'Job: 417'. Below that is a table with three columns: 'Item', 'Status', and 'Substatus'. The table contains one row of data: 'dewalt 134583736 876434', 'Installed', and 'None'. At the bottom of the screen is a navigation bar with five icons: 'General', 'Details', 'Equipment', 'Notes', and 'Pics'. The 'Equipment' icon is highlighted in yellow. A blue arrow points from the 'New Equipment' button in the top right corner of the 'Equipment' tab to the right screenshot.

The right screenshot shows the 'New Equipment' form. It has two tabs: 'General' and 'Custom Fields'. The 'General' tab is selected. The form contains the following fields: 'Status' (dropdown menu with 'Installed' selected), 'Substatus' (dropdown menu), 'Installed' (date field with '6/4/14' selected), 'Removed' (date field), 'Sub-item of' (dropdown menu), 'Manufacturer' (dropdown menu), 'Model #' (text field), 'Serial #' (text field), 'Product #' (text field), and a 'Warranty' checkbox. At the bottom of the form are 'Save' and 'Cancel' buttons. A blue arrow points from the 'New Equipment' button in the left screenshot to the 'Status' field in the right screenshot.

From the **Equipment Tab** you can click the "New Equipment" in the top right corner which will open up another window where you can enter all of the new equipment's information.

## Notes Tab

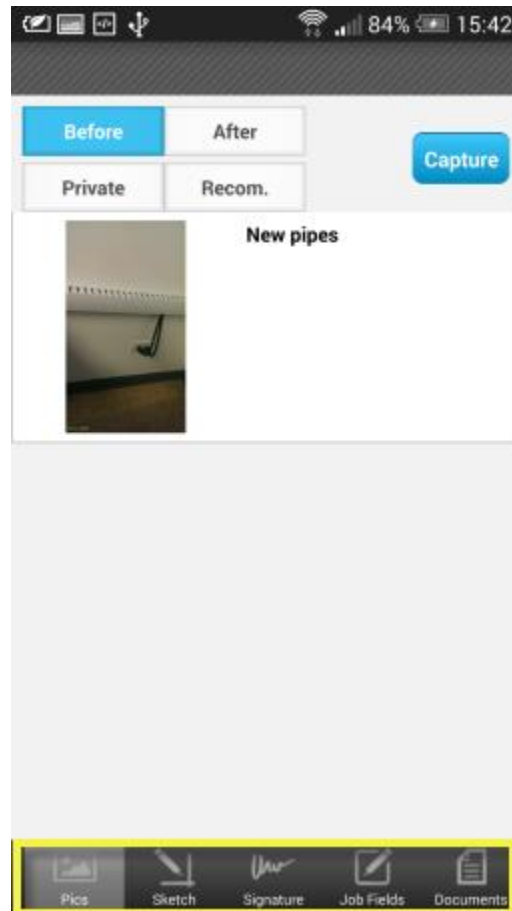
The notes tab allows you to write down any notes you wish on the work order, for private use, or the invoice. Anything you need to write down or note you will be able to do so here.



From the **Notes Tab** you can select either work order, private, or invoice tabs to write in. For the private notes, it will only show up for your employees and the customer will not be able to see what you write in that spot.

## Other Tabs

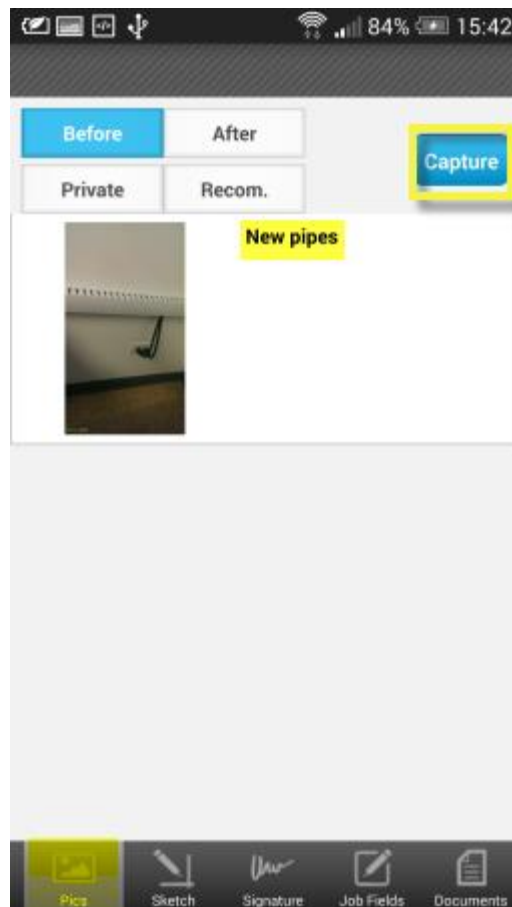
The other tabs in the Android offers you to take pictures, draw sketches, see past documents from the customer, take a signature, and custom fields.



The other tabs allow you to perform many important tasks such as:

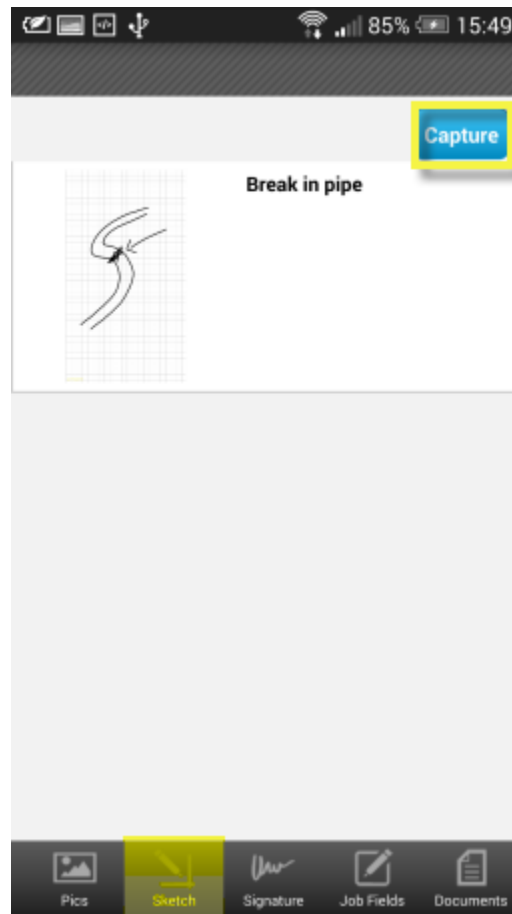
1. [Pics](#) – allows you to take before, after, private, and recommendation pictures.
2. [Sketch](#) – allows you to draw a sketch and saves it as a picture.
3. [Signature](#) – allows you to get a signature of the customer.
4. [Job Fields](#) – allows you to fill out your custom fields that you have.
5. [Documents](#) – allows you to view previous work orders from the customer.

**Pics Tab** lets you take before the job pictures, after the job pictures, private pictures that only you and your company will be able to view, and recommendation pictures that you can show the customer to recommend a future job.



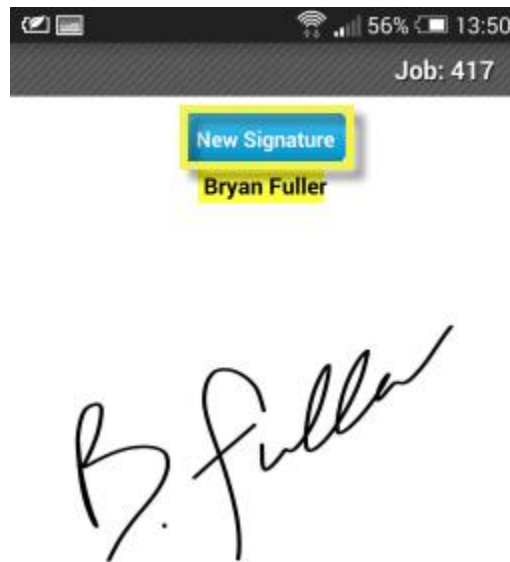
From the **Pics Tab** you can capture photos and enter them into the before, after, private, or recommendation tab. Along with adding and taking pictures, you can write a brief note next to the picture if you would like to note anything to the customer or your company from the private tab. To take a picture or insert one from the photo gallery click the capture button in the top right corner

**Sketch** is a place where you can draw anything you need by hand instead of taking a picture. Once you have completed your drawing it will capture it and save it as a picture.



From the **Sketch Tab** you can press the capture button which opens up window where it will allow you to draw a picture and select capture which will then save it as a photo. You can also write a brief note next to the picture to specify exactly what it is.

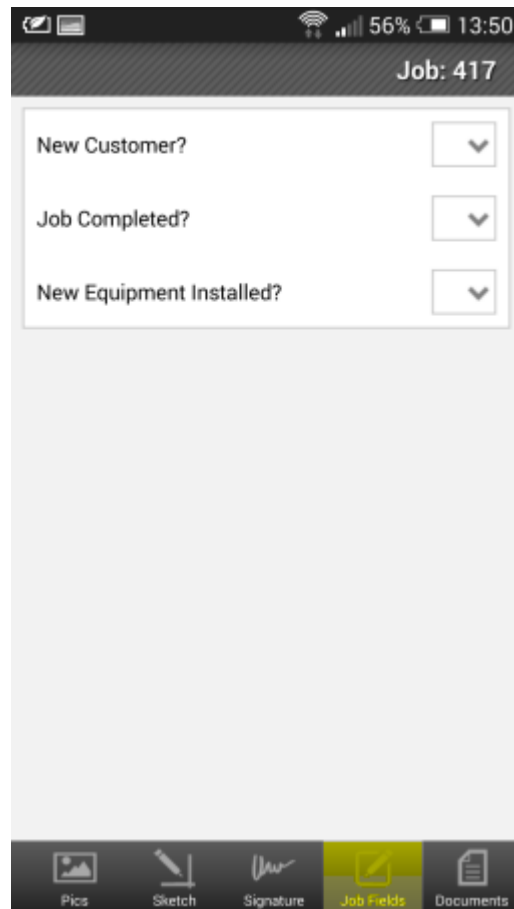
**Signature** lets you capture the customers' signature when the job is completed and is included in the work order. Along with the signature you can add a terms and conditions and write the customers' name along with the signature.



The **Signature Tab** lets you capture a signature of the customer. By clicking New Signature you will be able to write the signature or delete it and enter a new one again. A name can also be displayed along with the signature to confirm the person.



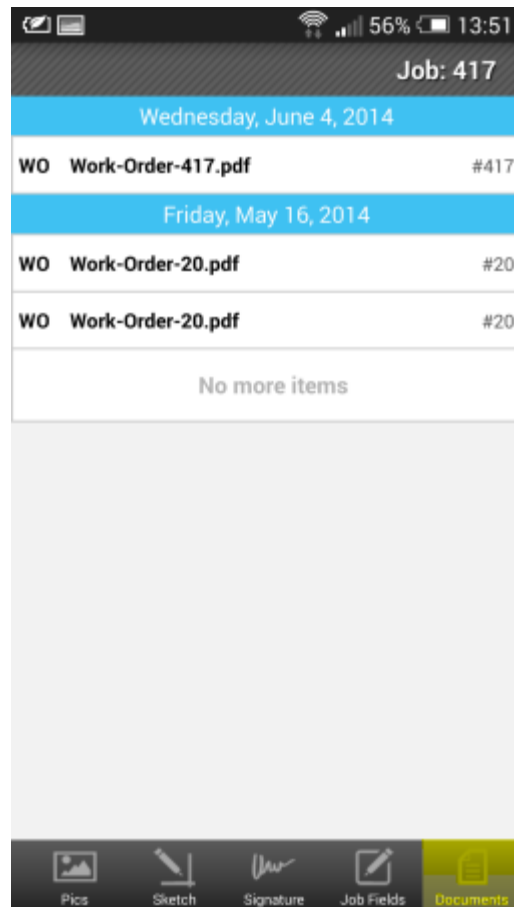
**Job Fields** allows you to customize any additional information you would like to have during a job or estimate. You can customize this feature in ServiceCEO.



The screenshot shows a mobile application interface for 'Job: 417'. At the top, there is a status bar with icons for signal, Wi-Fi, and battery (56%), along with the time 13:50. Below the status bar, the title 'Job: 417' is displayed. The main content area contains three questions, each with a dropdown arrow to its right: 'New Customer?', 'Job Completed?', and 'New Equipment Installed?'. At the bottom of the screen is a navigation bar with five tabs: 'Pics', 'Sketch', 'Signature', 'Job Fields' (which is highlighted in yellow), and 'Documents'.

From **Job Fields Tab**, which you can customize from ServiceCEO, you can answer any of the questions you have included.

**Documents** allows you to view past work orders and documents from the customer to let you know what was done before and any other information you would like to know.



From the **Documents Tab** you can click on previous jobs and review what was done.

# Add a New Job

## Description

Add New Job feature allows technicians to create jobs in the ServiceCEO database and Supervisor Role. Technicians can select customer, date, duration, frequency, and summary. Also, technicians can add products, services, and kits, as well as capture photos and signature. When a new job is created and submitted, the dispatch is notified by an email.

## Allowing to Add a New Job

Before you can actually add a job from your mobile device make sure you have the device setting for this option enabled. To do that go to your ServicePortal:

The screenshot shows the ServiceBridge web application interface. At the top, there is a navigation bar with the ServiceBridge logo and tagline 'Mobilize your team'. To the right of the logo are links for 'ABOUT US', 'BLOG', 'CONTACT US', 'SUPPORT', 'MY SERVICE PORTAL', and a 'LOGOUT' button. Below the navigation bar is a horizontal menu with 'Account Summary' (highlighted with a yellow box and labeled '1.'), 'Job Photos', 'Job Documents', 'Knowledge Base', 'Geo-Tracking', and 'Status: Active'. On the left side, there is a vertical sidebar with 'Overview' and 'Devices' (highlighted with a yellow box and labeled '2.'). The main content area is titled 'DEVICES' and contains a table with columns 'DEVICE NAME', 'ASSIGNED TO', and 'STATUS'. The table lists four devices: 'Iphone 1' (Team 1), 'Android 1' (Team 2), 'iPad' (Team 4), and 'HTC' (Team 4). Each device row has an 'Edit' button (highlighted with a yellow box and labeled '3.') and a close button. At the bottom of the table is a row for 'Enter Device Name' with an 'Incomplete' status and an 'Edit' button.

DEVICE NAME	ASSIGNED TO	STATUS
Iphone 1	Team 1	Active
Android 1	Team 2	Active
iPad	Team 4	Active
HTC	Team 4	Active
Enter Device Name		Incomplete

1. Go to Account Summary
2. Devices
3. Select the device that you want to Edit

## DEVICE SETTINGS AND PERMISSIONS

### Work Orders

- ☒ Allow to add New Job (?) **4**
- ☒ Allow to email Work Order receipts (?)
- ☐ Send Work order to an additional email (?)

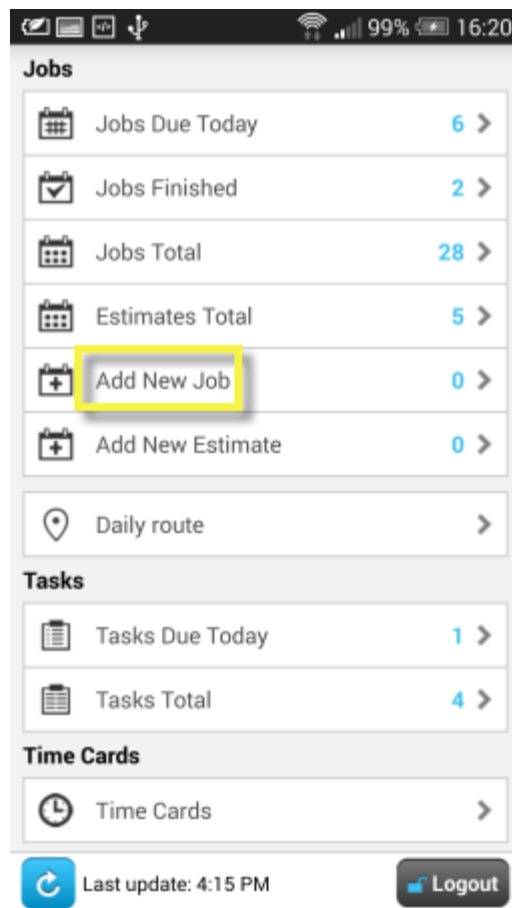
### Estimates

- ☒ Allow to add New Estimate (?)
- ☒ Allow to convert estimates to work orders (?)
- ☒ Allow creating new estimate from a job (?)

4. Find “Allow to add New Job” and make sure it is checked and save the changes.

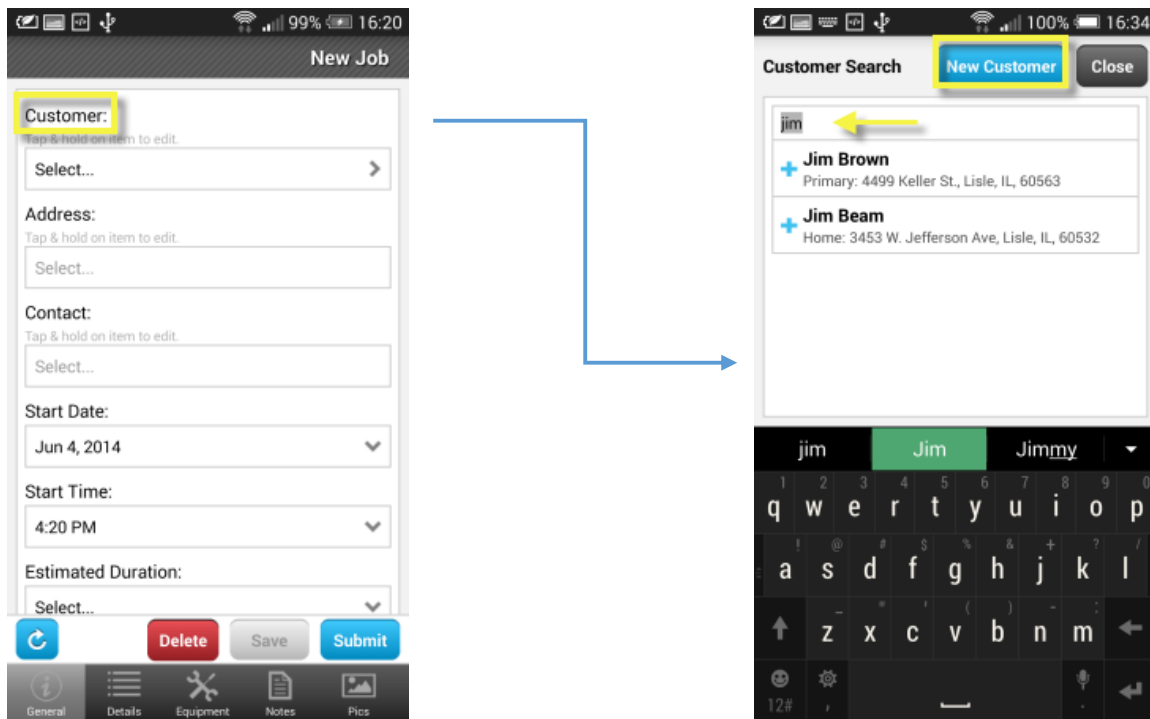
## Adding a New Job

From your dashboard you can click Add New Job to begin.



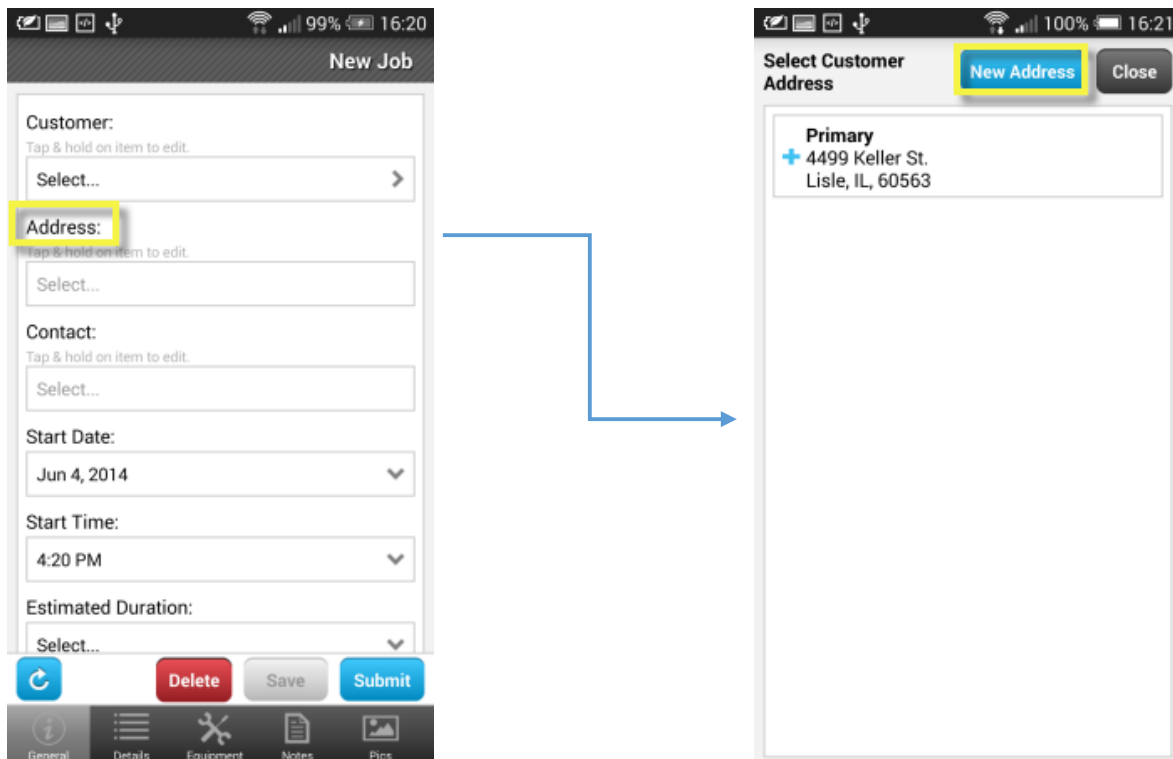
A new window will pop up asking you to fill out the information for the new job.

1. **Customer** – select the customer who this job will be done for, or add a new customer.



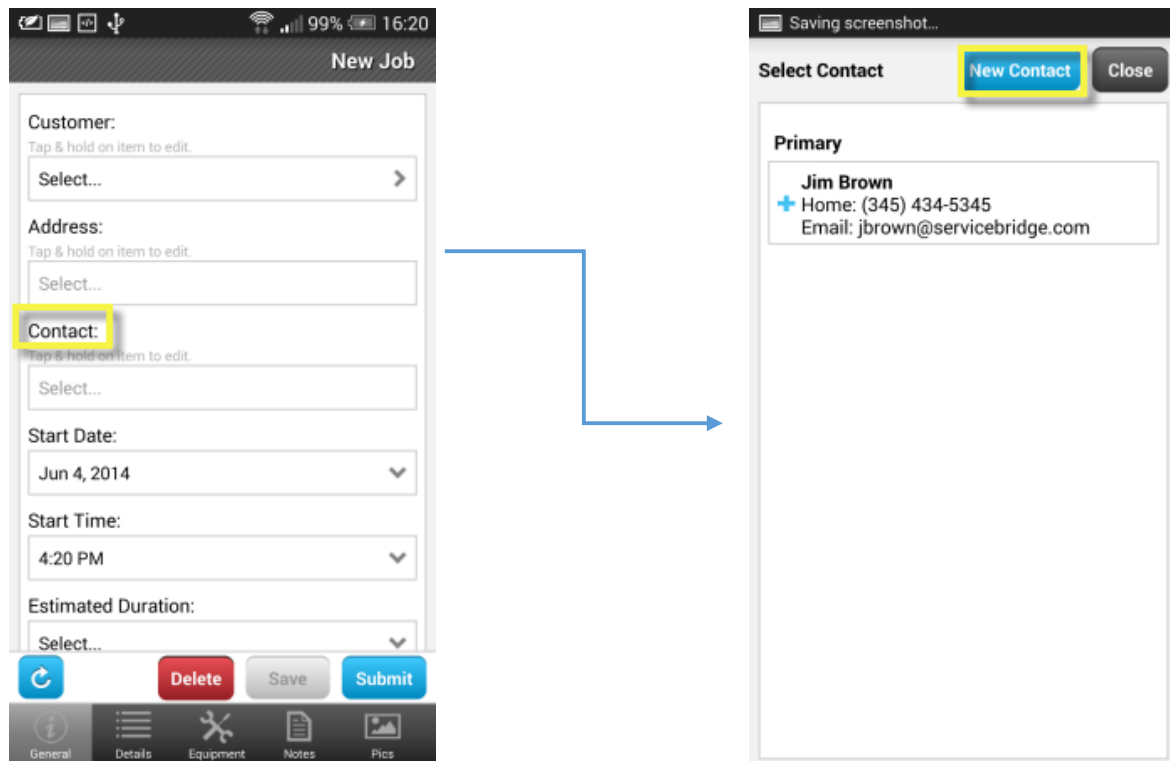
Type the first three letters of a customer or click “New customer” in the top to enter a new one.

2. **Address** – select the address of the new job, or add a new address.



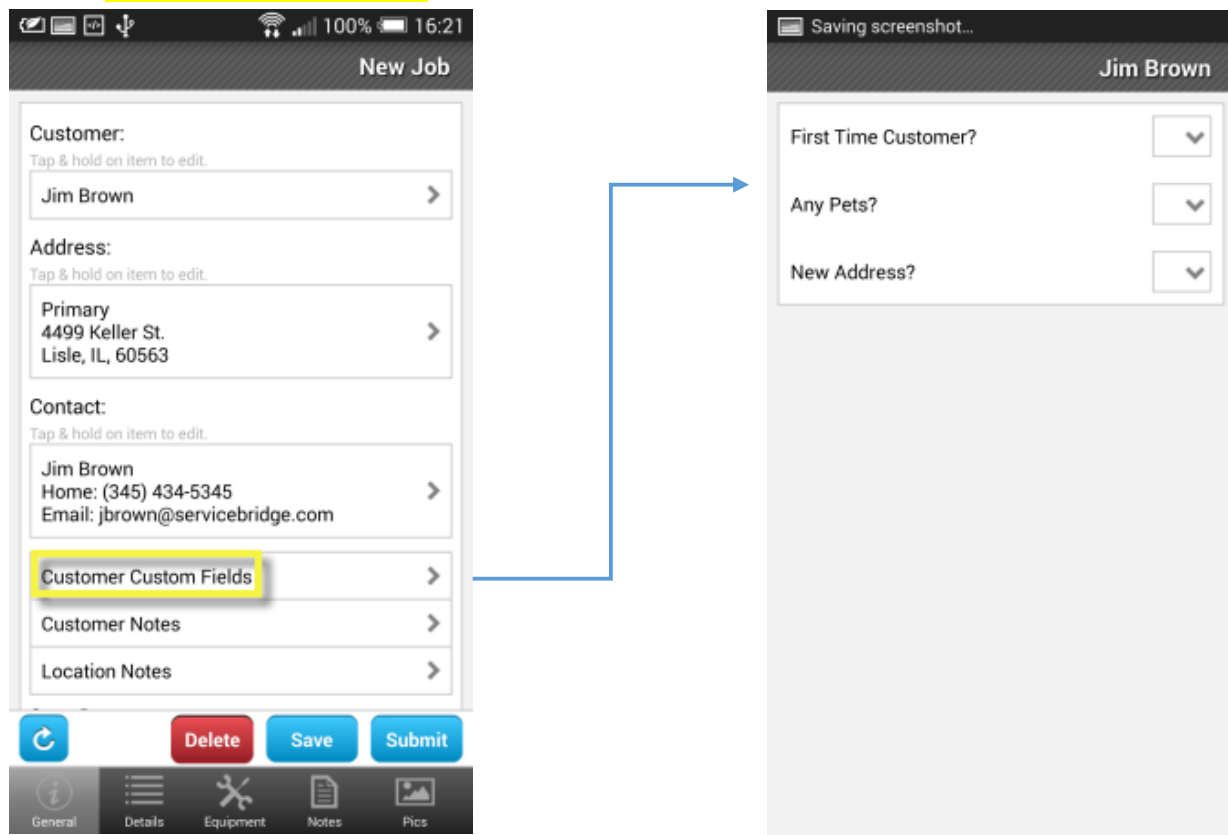
Click for the address or enter a new one by pressing “New Address”.

3. **Contact** – select who the contact will be for the job, or add a new contact.



Choose the correct contact or enter a new one by pressing “New Contact”.

4. **Customer Custom Fields** – enter any customer custom fields you have.



5. **Customer Notes** – lets you write notes about customers for the work order and private.

The screenshot shows the 'New Job' form. The 'Customer' field is set to 'Jim Brown'. The 'Address' field is set to 'Primary, 4499 Keller St., Lisle, IL, 60563'. The 'Contact' field is set to 'Jim Brown, Home: (345) 434-5345, Email: jbrown@servicebridge.com'. The 'Customer Custom Fields' section is expanded, and 'Customer Notes' is highlighted with a yellow box. The 'Location Notes' field is also visible. The bottom navigation bar includes 'General', 'Details', 'Equipment', 'Notes', and 'Pics'.

The screenshot shows the 'Work Order' form. The 'Estimate' field is visible. The bottom navigation bar includes 'General', 'Details', 'Equipment', 'Notes', and 'Pics'.

6. **Location Notes** – lets you write notes about the location for the work order and private.

The screenshot shows the 'New Job' form. The 'Customer' field is set to 'Jim Brown'. The 'Address' field is set to 'Primary, 4499 Keller St., Lisle, IL, 60563'. The 'Contact' field is set to 'Jim Brown, Home: (345) 434-5345, Email: jbrown@servicebridge.com'. The 'Customer Custom Fields' section is expanded, and 'Location Notes' is highlighted with a yellow box. The 'Customer Notes' field is also visible. The bottom navigation bar includes 'General', 'Details', 'Equipment', 'Notes', and 'Pics'.

The screenshot shows the 'Work Order' form. The 'Estimate' field is visible. The bottom navigation bar includes 'General', 'Details', 'Equipment', 'Notes', and 'Pics'.

7. **Start Date** – enter the date of the New Job.

A screenshot of a mobile application's 'New Job' form. The 'Start Date' field is highlighted with a yellow box and shows 'Jun 4, 2014'. Other fields include 'Start Time' (4:20 PM), 'Estimated Duration' (Select...), 'Summary' (empty), 'Campaign' (<None>), 'Default Equipment' (<None>), and 'Frequency' (Single Visit). At the bottom are buttons for 'Delete', 'Save', and 'Submit', and a navigation bar with icons for General, Details, Equipment, Notes, and Pics.

A screenshot showing a date picker overlay on the 'New Job' form. The title is 'Wed, Jun 4, 2014'. The calendar shows the month of June 2014, with the 4th highlighted. Other dates visible are May 03, 2013, Jun 04, 2014, and Jul 05, 2015. A 'Done' button is at the bottom of the picker.

8. **Start Time** – enter the start time of the New Job.

A screenshot of the 'New Job' form, identical to the one in step 7, but with the 'Start Time' field highlighted by a yellow box. It shows '4:20 PM'.

A screenshot showing a time picker overlay on the 'New Job' form. The title is 'Set time'. The time is set to 5:10 PM. The picker shows hours from 4 to 6, minutes from 09 to 11, and AM/PM options. A 'Done' button is at the bottom.



9. **Estimated Duration** – select the approximate time the job will take.

The screenshot shows the 'New Job' form on a mobile device. The 'Estimated Duration' field is highlighted with a yellow box. The form includes fields for Start Date (Jun 4, 2014), Start Time (4:20 PM), Summary, Campaign (<None>), Default Equipment (<None>), and Frequency (Single Visit). At the bottom are buttons for General, Details, Equipment, Notes, and Pics, and action buttons: Delete, Save, and Submit.

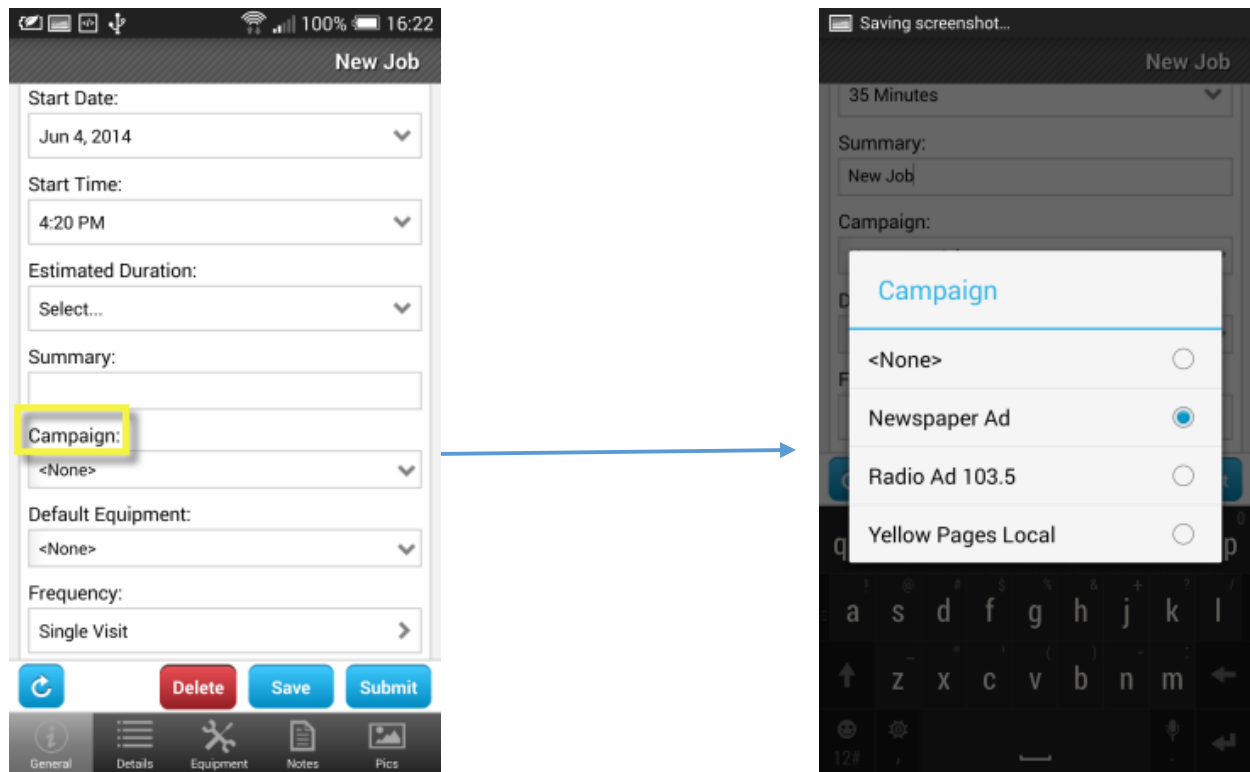
The screenshot shows a 'Duration' selection dialog. It features a numeric keypad with columns for hours (00 to 01) and minutes (23 to 59). A colon separator is in the middle. A 'Done' button is at the bottom.

10. **Summary** – Write down what the job will be.

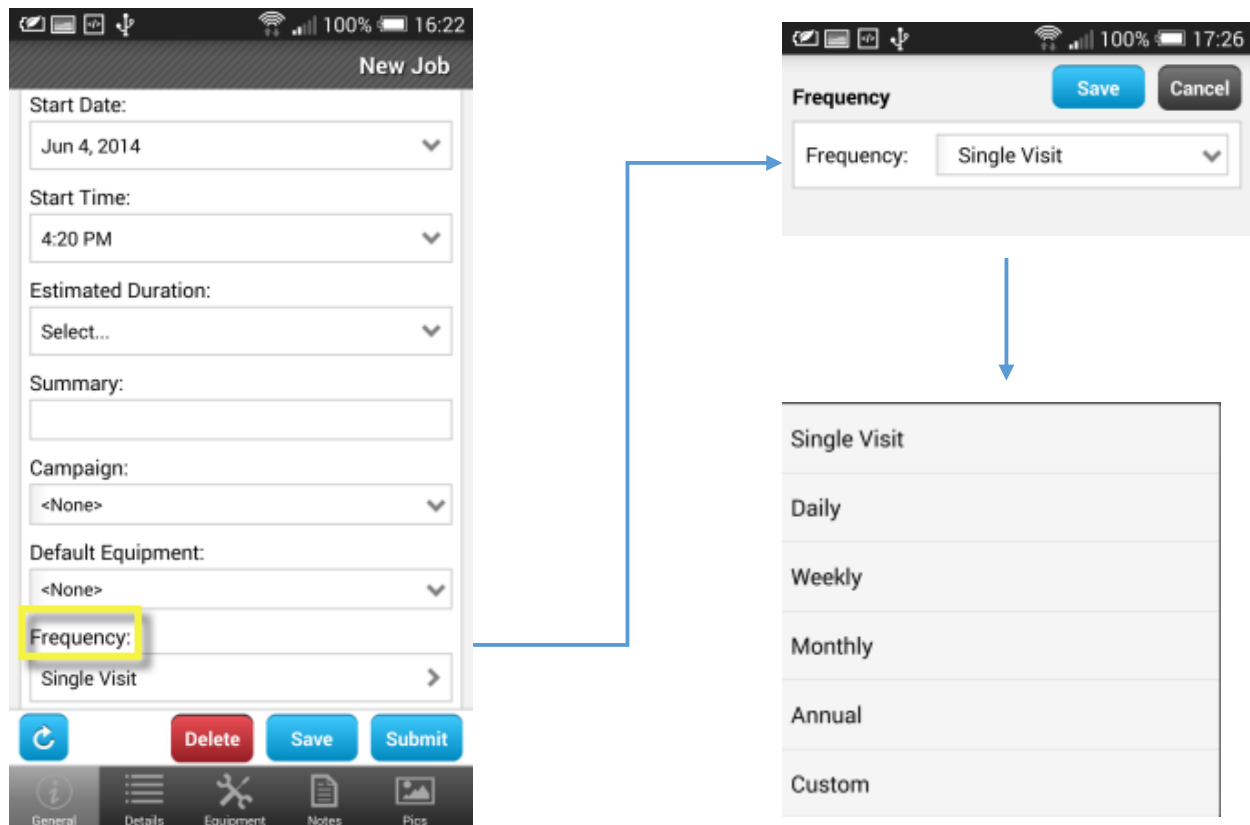
The screenshot shows the 'New Job' form with the 'Summary' field highlighted by a yellow box. The 'Estimated Duration' field now shows 'Select...'. The bottom navigation and action buttons remain the same.

The screenshot shows the 'New Job' form with the 'Summary' field filled with 'New Job' and the 'Campaign' field set to 'Newspaper Ad'. The keyboard is open at the bottom of the screen.

11. **Campaign** – Lets you select the marketing campaign used to get the job.

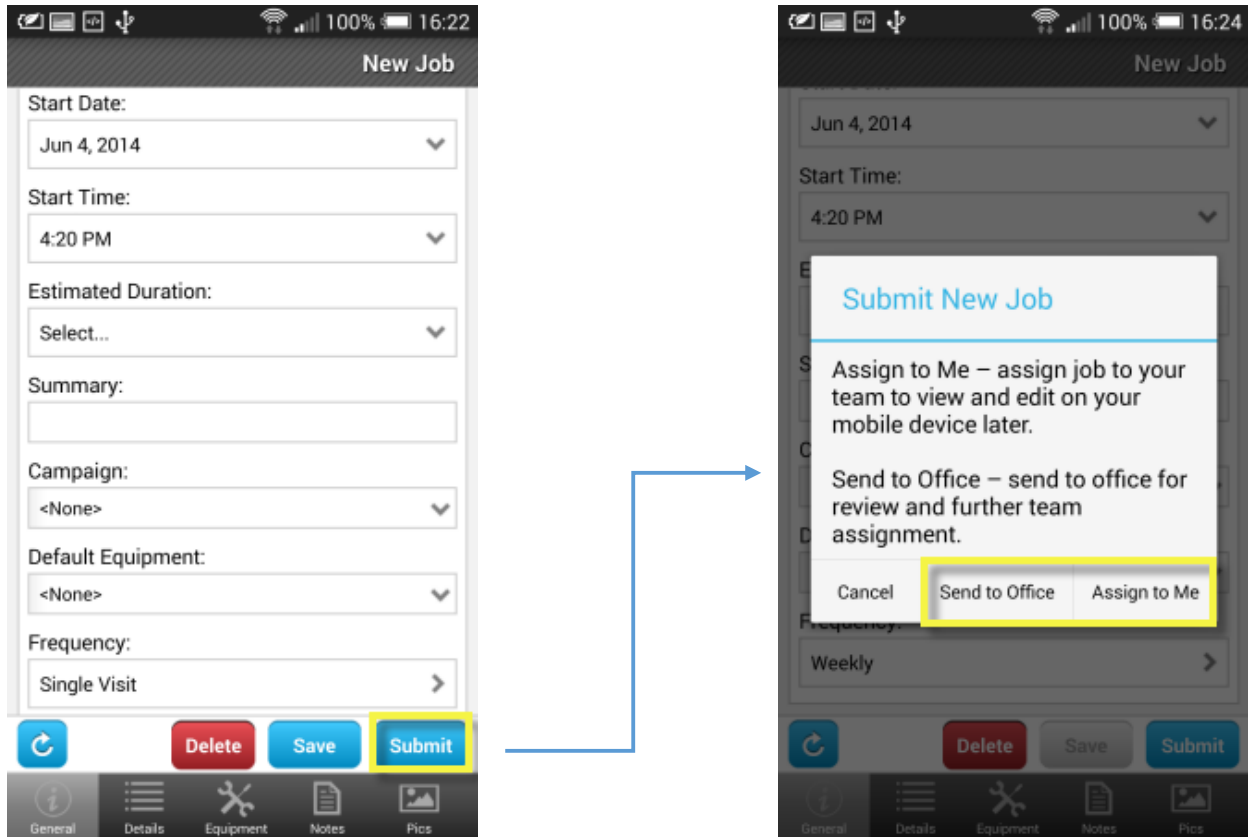


12. **Frequency** – lets you select the frequency of the visit, daily, weekly, monthly, etc.



## Submitting the Job

Once you fill out all the information you can submit the job to either assign it to yourself or send to the office.



# Add a New Estimate

## Description

Add a New Estimate feature allows technicians to create an in the ServiceBridge app. Technicians can select Start Date/Time, Estimated Duration, Summary, Customer, and Campaign. Also, technicians can add products, services, and kits, as well as capture photos and signature. When a new estimate is created and submitted, the dispatch is notified by an email.

## Allowing Add a New Estimate

Before you can actually add a job from your mobile device make sure you have the device setting for this option enabled. To do that go to your ServicePortal:

The screenshot shows the ServiceBridge mobile app interface. At the top, the ServiceBridge logo is on the left, and navigation links (ABOUT US, BLOG, CONTACT US, SUPPORT, MY SERVICE PORTAL, LOGOUT) are on the right. Below the logo, the tagline 'Mobilize your team' is displayed. A horizontal menu contains 'Account Summary' (highlighted with a yellow box and labeled '1.'), 'Job Photos', 'Job Documents', 'Knowledge Base', 'Geo-Tracking', and 'Status: Active'. On the left side, a vertical menu lists 'Overview', 'Devices' (highlighted with a yellow box and labeled '2.'), 'Subscription', 'Users', 'Employees', 'Customers', and 'Settings'. The main content area is titled 'DEVICES' and contains a table with columns 'DEVICE NAME', 'ASSIGNED TO', and 'STATUS'. The table lists three active devices: 'Iphone 1' (Team 1), 'Android 1' (Team 2), and 'iPad' (Team 4). Each device row has an 'Edit' button (highlighted with a yellow box and labeled '3.') and a close button. Below the active devices, there are two rows for 'Enter Device Name' with an 'Incomplete' status and an 'Edit' button. At the bottom, the copyright notice '© 2012 ServiceBridge LLC, All Rights Reserved' is on the left, and 'db Chicago Web Design by DevBridge' is on the right.

DEVICE NAME	ASSIGNED TO	STATUS
Iphone 1	Team 1	Active
Android 1	Team 2	Active
iPad	Team 4	Active
Enter Device Name		Incomplete
Enter Device Name		Incomplete

1. Go to Account Summary
2. Devices
3. Edit

## DEVICE SETTINGS AND PERMISSIONS

### Work Orders

- ☒ Allow to add New Job (?)
- ☒ Allow to email Work Order receipts (?)
- ☒ Send Work order to an additional email (?)

david@servicebridge.com

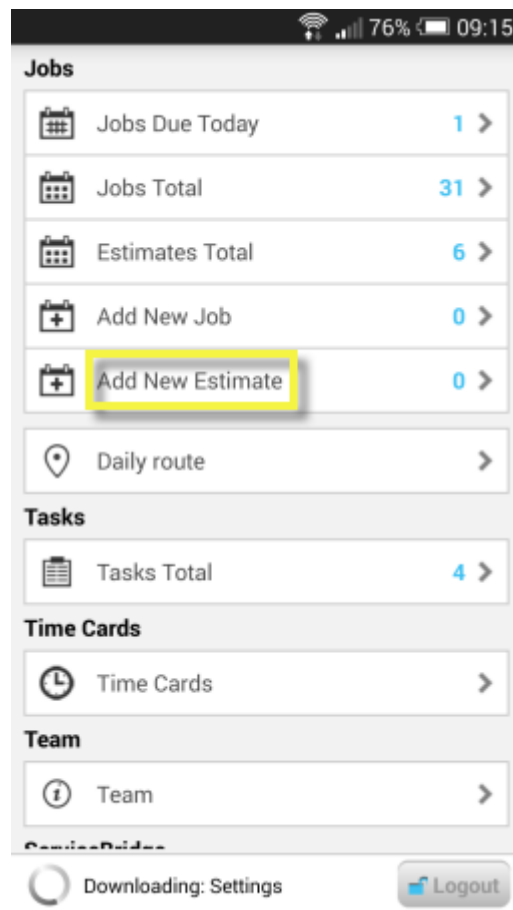
### Estimates

- ☒ Allow to add New Estimate (?) **4.**
- ☒ Allow to convert estimates to work orders (?)
- ☒ Allow creating new estimate from a job (?)
- ☒ Allow to email Estimates (?)
- ☐ Send Estimate to an additional email (?)

4. Find “Allow to add New Estimate” and make sure it is checked. Then save the changes.

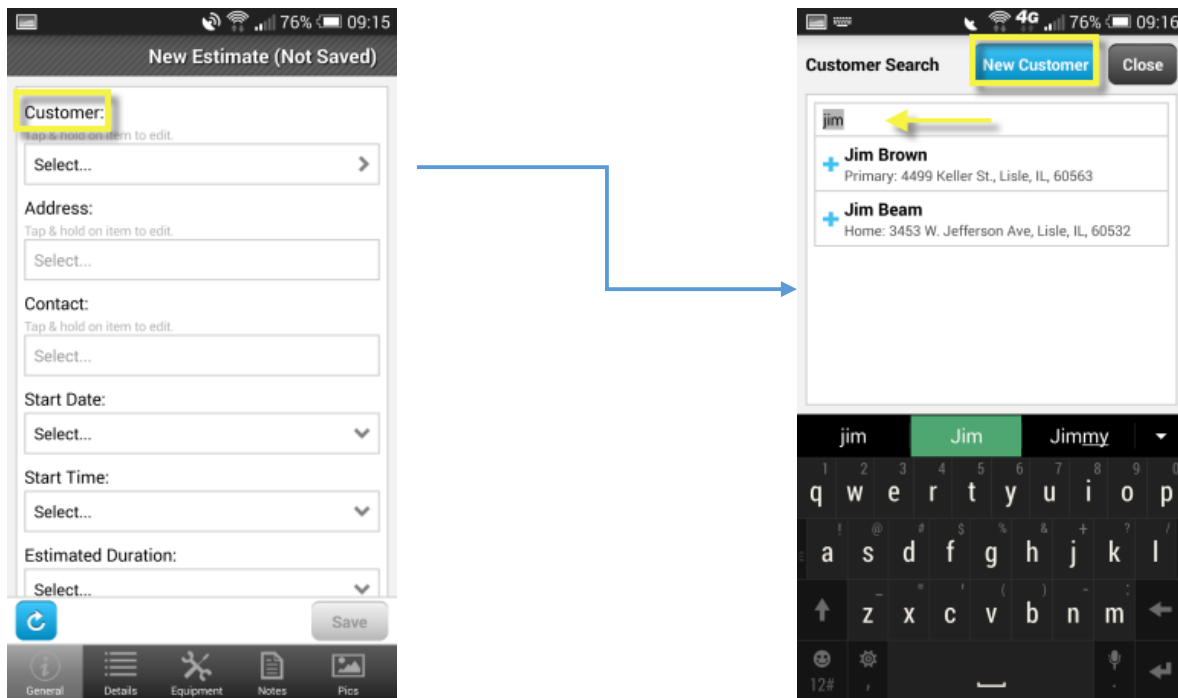
## Adding a New Estimate

From your dashboard you can click Add New Job to begin.



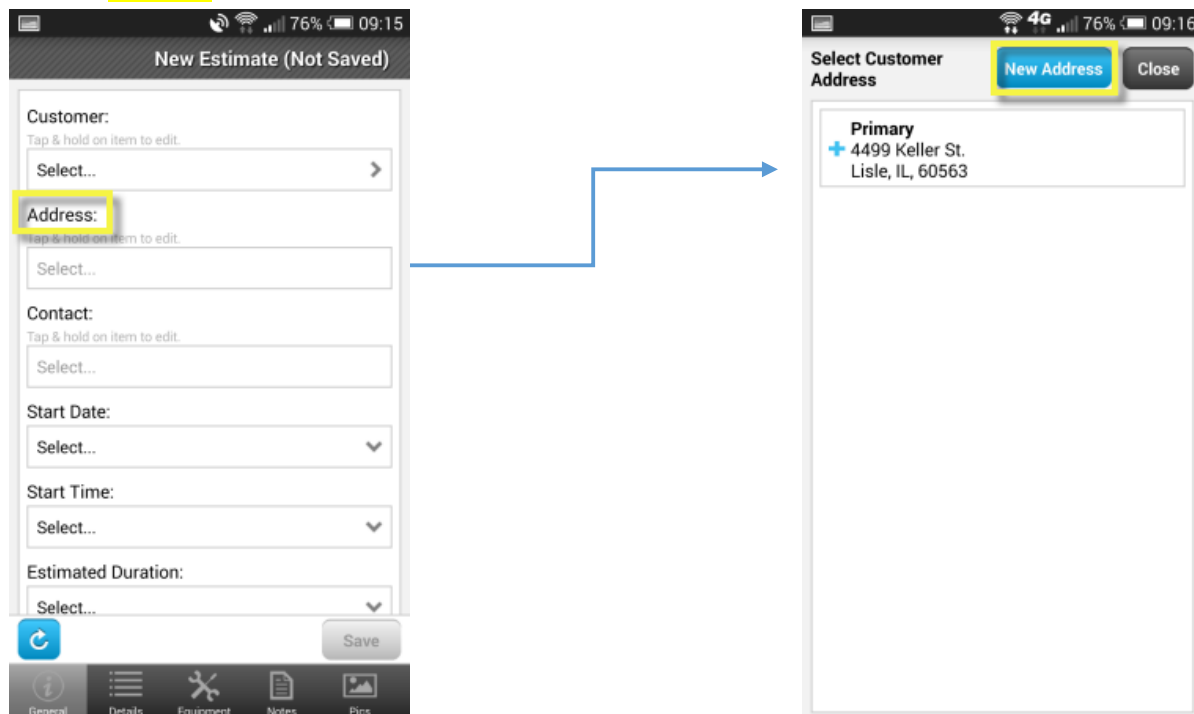
A new window will pop up asking you to fill out the information for the new job.

1. **Customer** – select the customer who this job will be done for, or add a new customer.



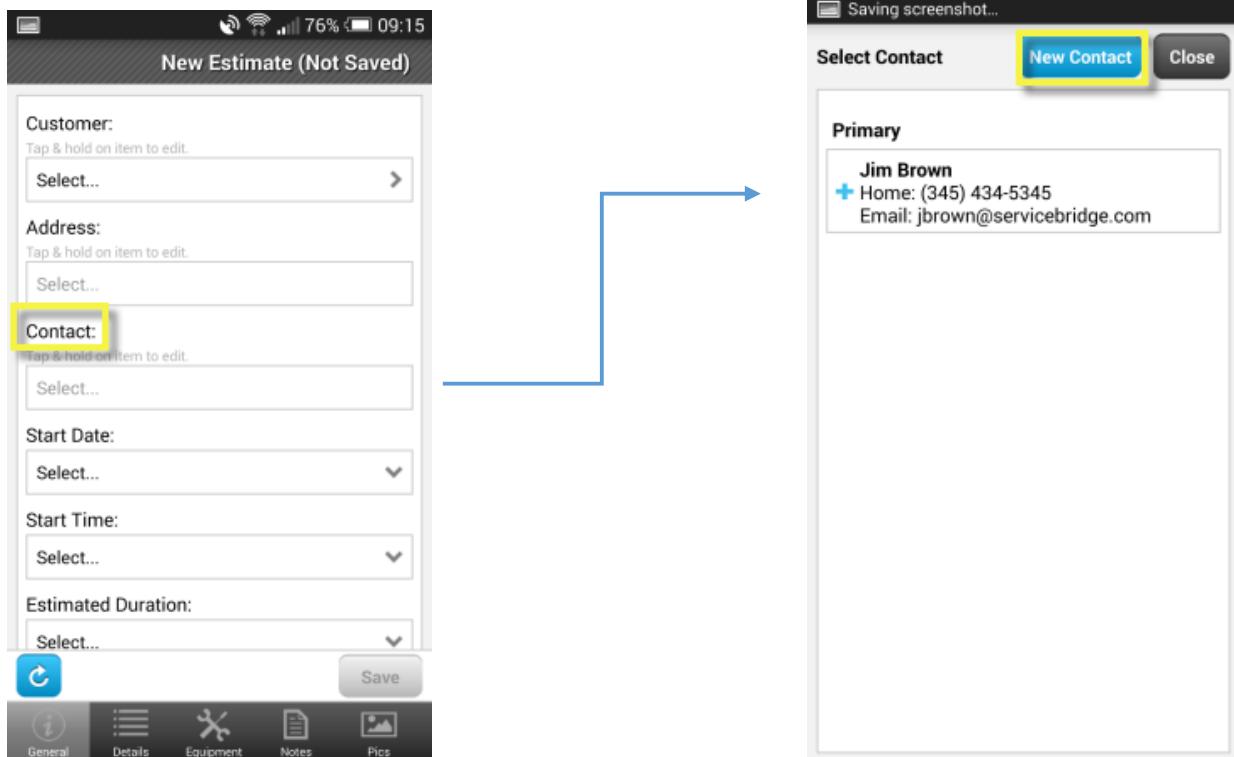
Type the first three letters of a customer or press “New Customer” for a new one.

2. **Address** – select the address of the new job, or add a new address.



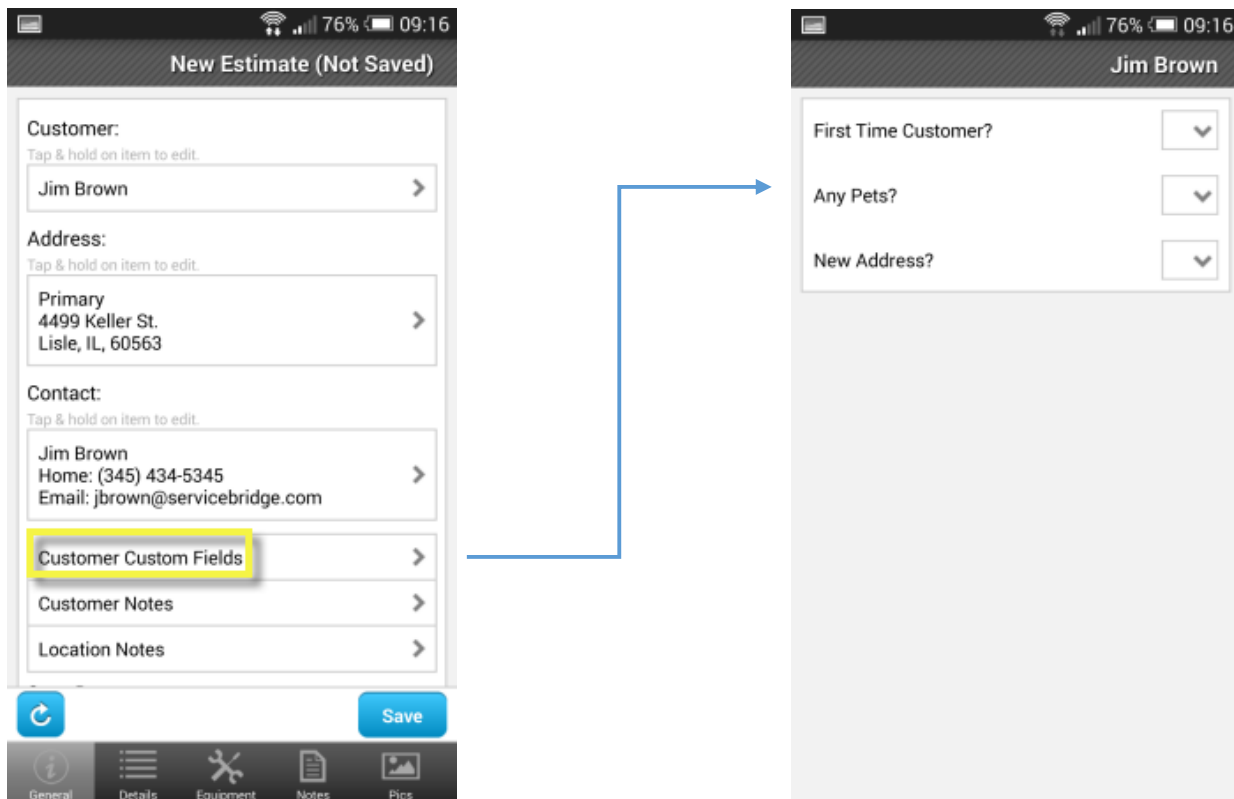
Click for the address or enter a new one by pressing “New Address”.

3. **Contact** – select who the contact will be for the job, or add a new contact.

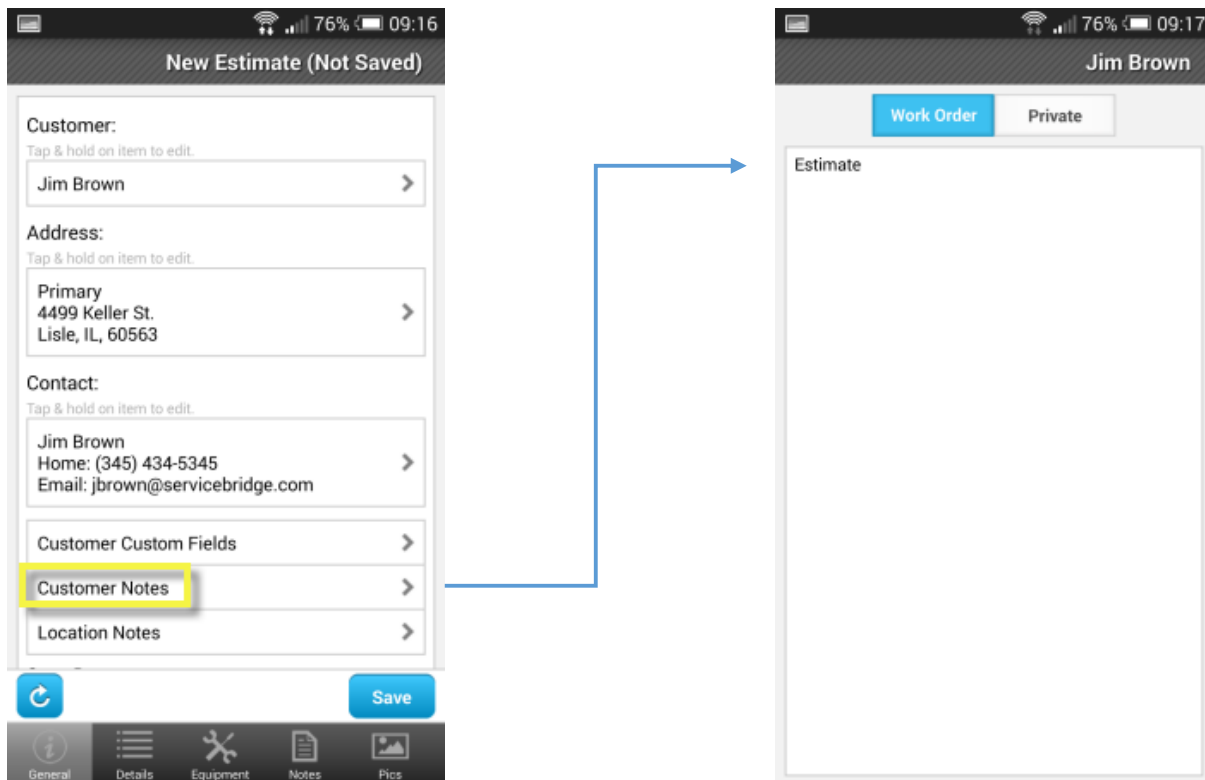


Choose the correct contact or enter a new one by pressing “New Contact”.

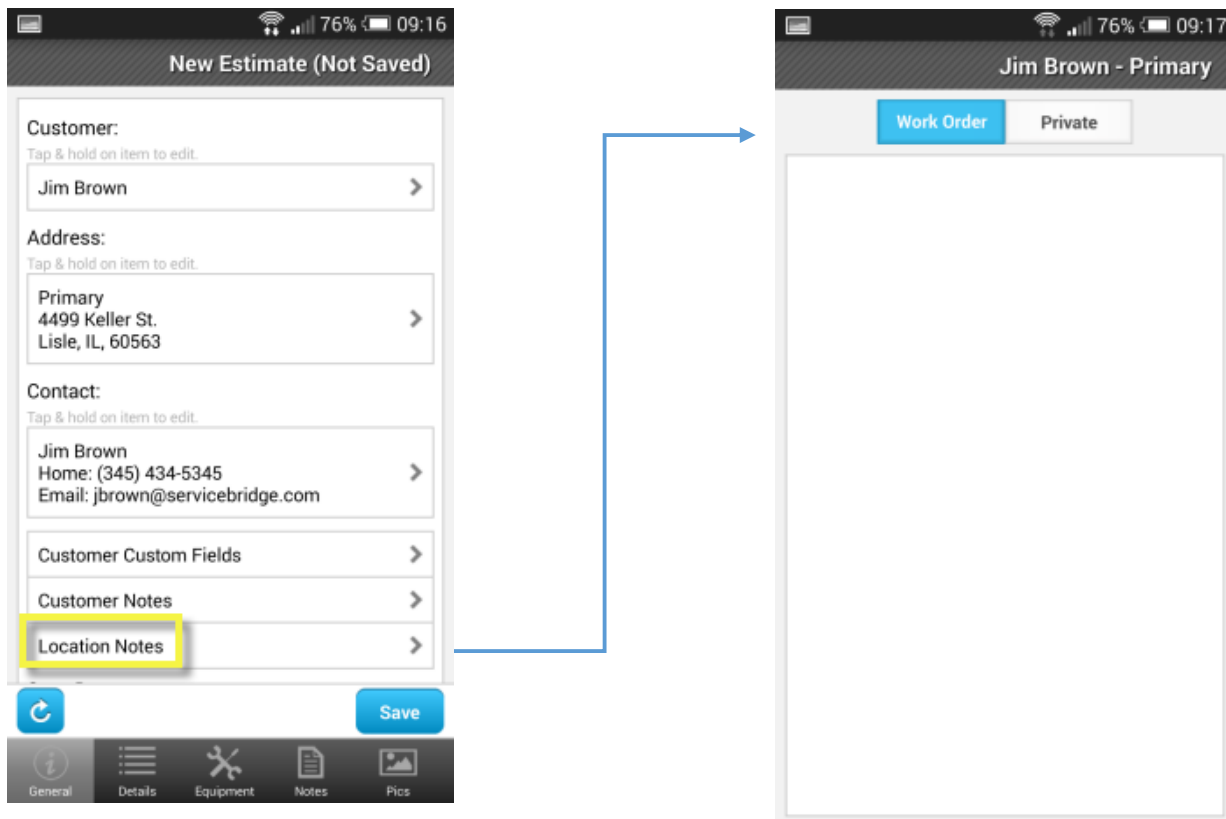
4. **Customer Custom Fields** – enter any customer custom fields you have



5. **Customer Notes** – lets you write notes about customers for the work order and private.

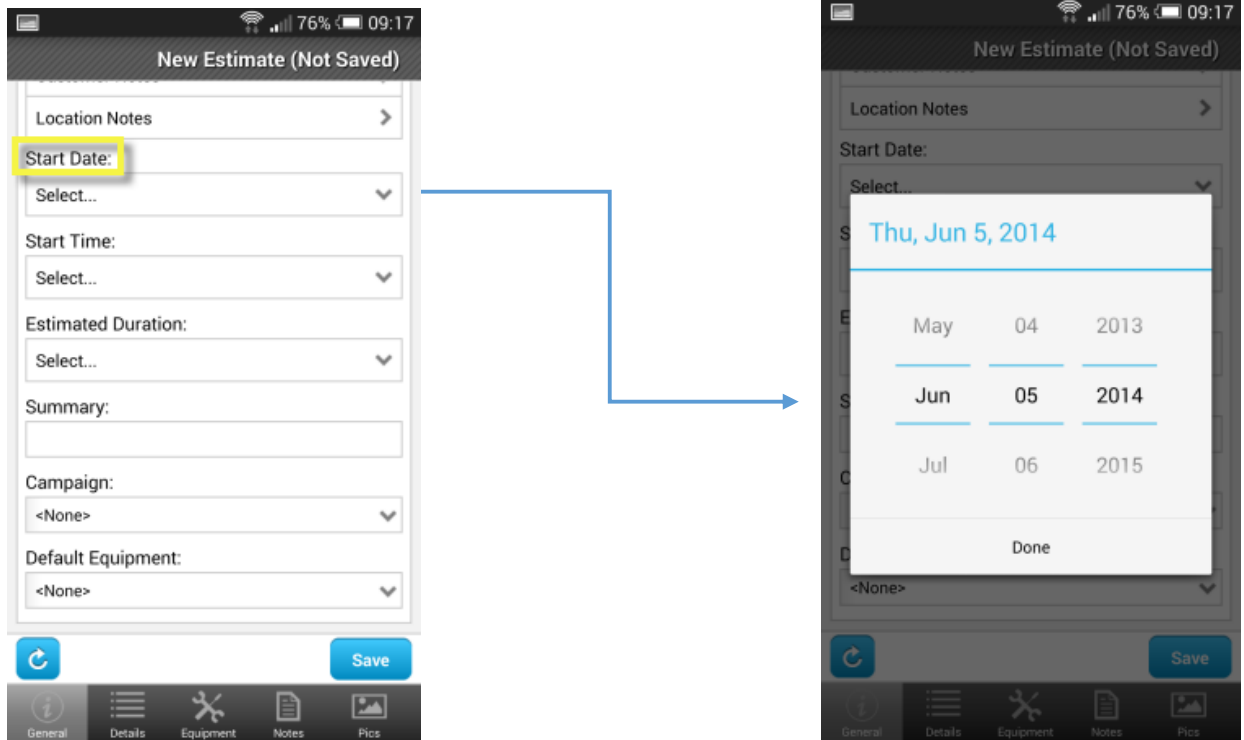


6. **Location Notes** – lets you write notes about the location for the work order and private.

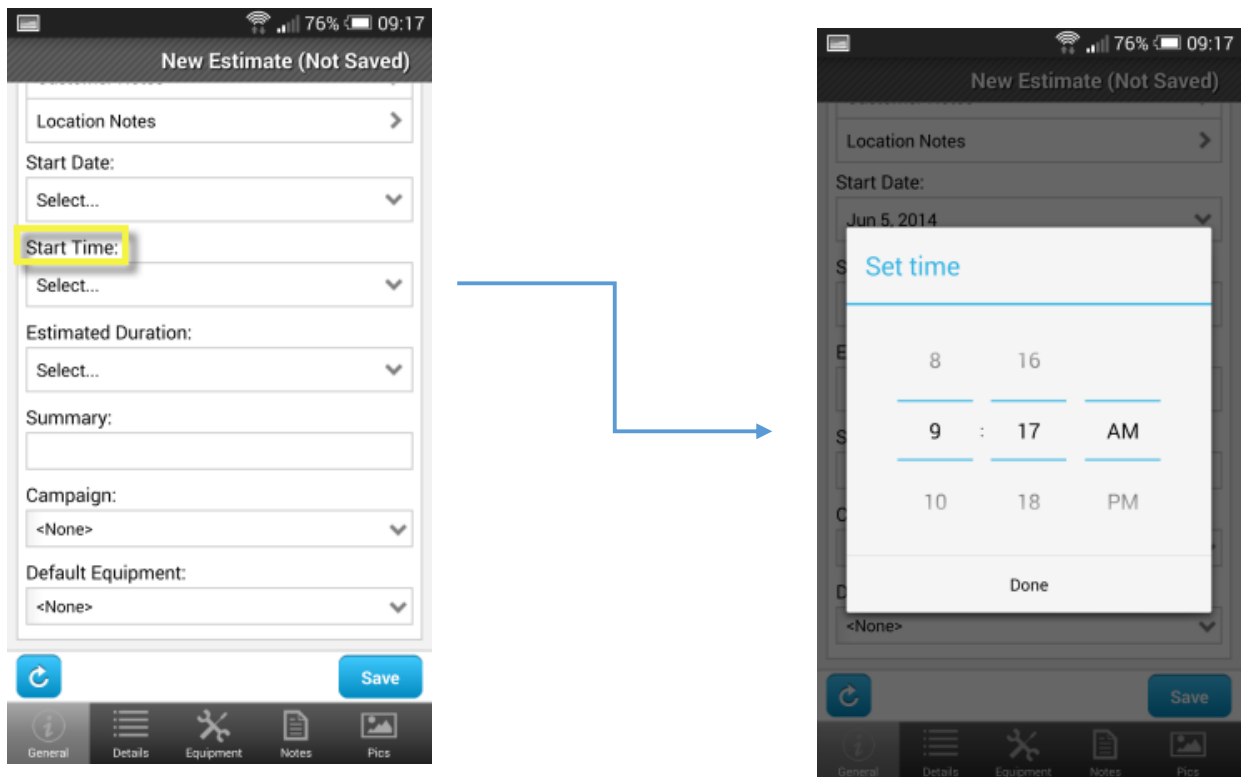




7. **Start Date** – enter the date of the New Job



8. **Start Time** – enter the time of the New Job



9. **Estimated Duration** – enter how long the job is estimated to take.

This screenshot shows the 'New Estimate (Not Saved)' form. The 'Estimated Duration' field is highlighted with a yellow box. The form includes fields for Location Notes, Start Date, Start Time, Estimated Duration, Summary, Campaign, and Default Equipment. A blue arrow points from the highlighted field to the next screenshot.

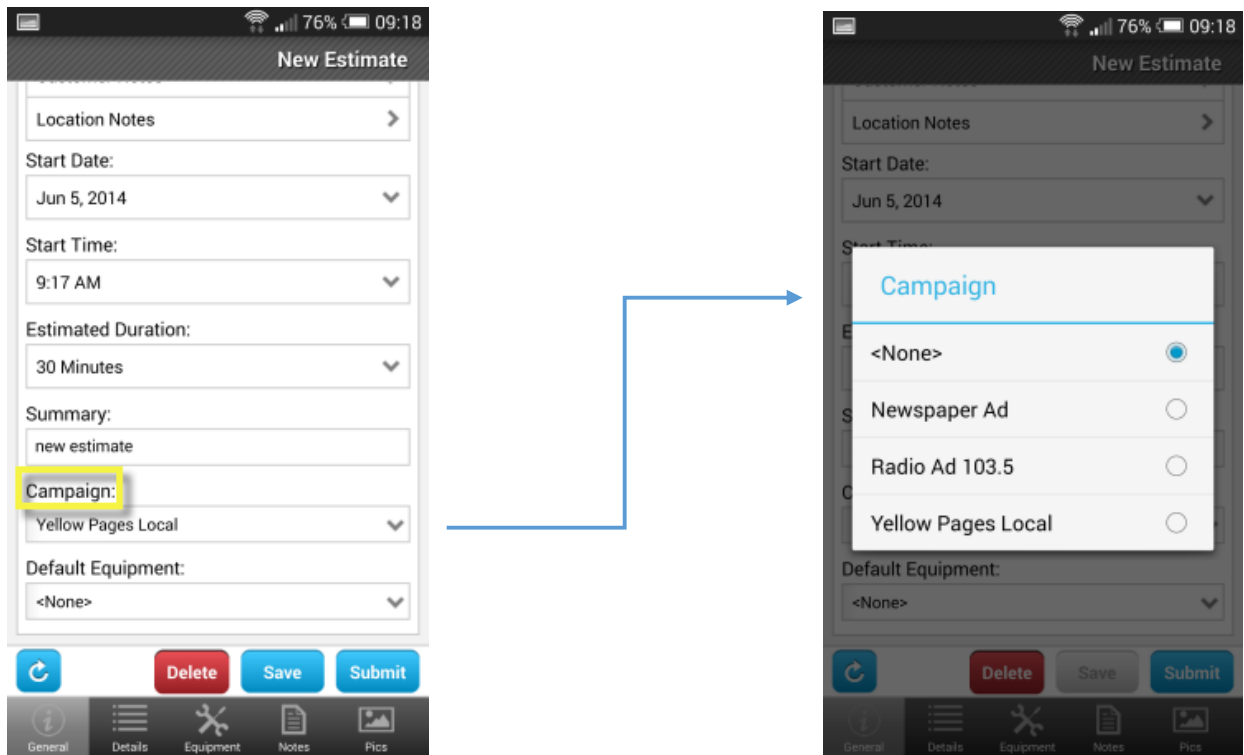
This screenshot shows a 'Duration' picker dialog. It displays a time selection interface with hours (23, 00, 01) and minutes (59, 00, 01). A 'Done' button is at the bottom. A blue arrow points from the previous screenshot to this dialog.

10. **Summary** – enter the job summary or what will be done for this job.

This screenshot shows the 'New Estimate (Not Saved)' form. The 'Summary' field is highlighted with a yellow box. The form includes fields for Location Notes, Start Date, Start Time, Estimated Duration, Summary, Campaign, and Default Equipment. A blue arrow points from the highlighted field to the next screenshot.

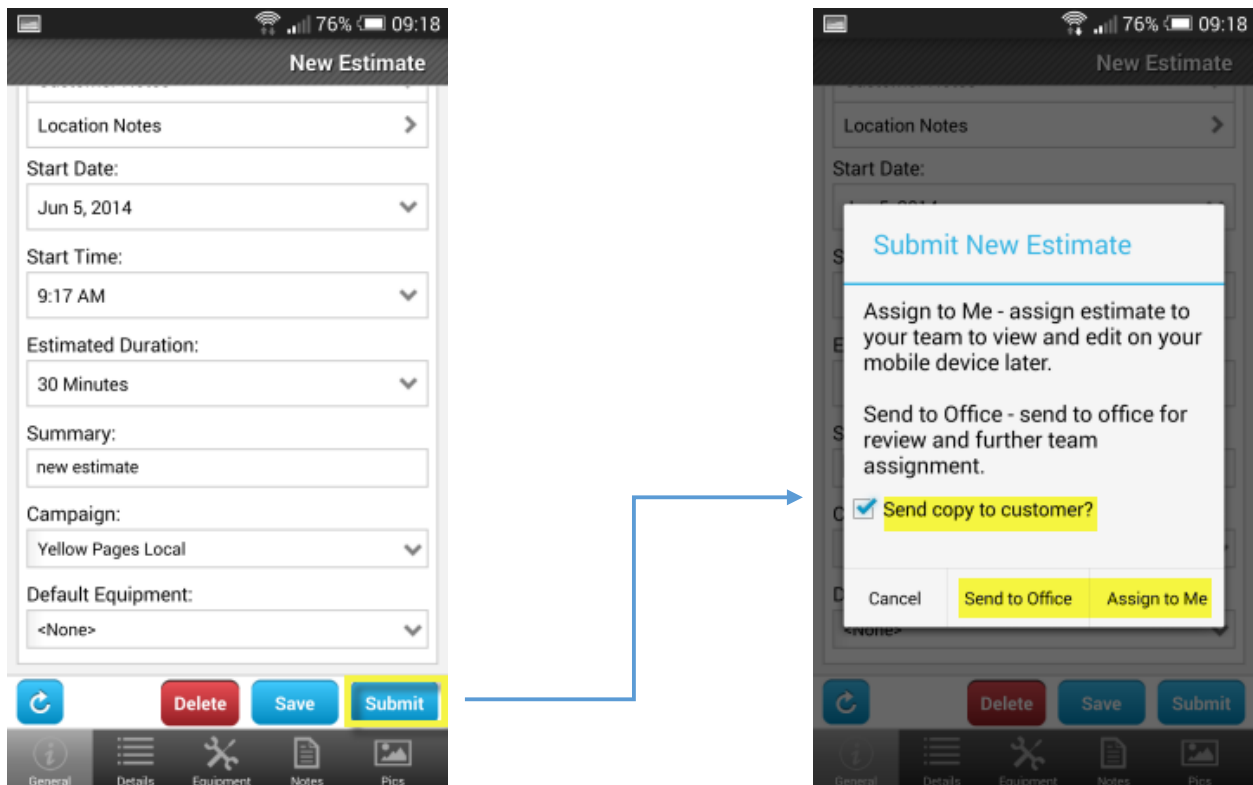
This screenshot shows the 'New Estimate (Not Saved)' form with the 'Summary' field populated with the text 'new estimate'. A keyboard is visible at the bottom of the screen. A blue arrow points from the previous screenshot to this form.

11. **Campaign** – lets you select the marketing campaign used for this job.



## Submitting the Estimate

Once you fill out all the information you can submit the estimate to either assign it to yourself or send to the office. You can also select to send a copy to the customer.



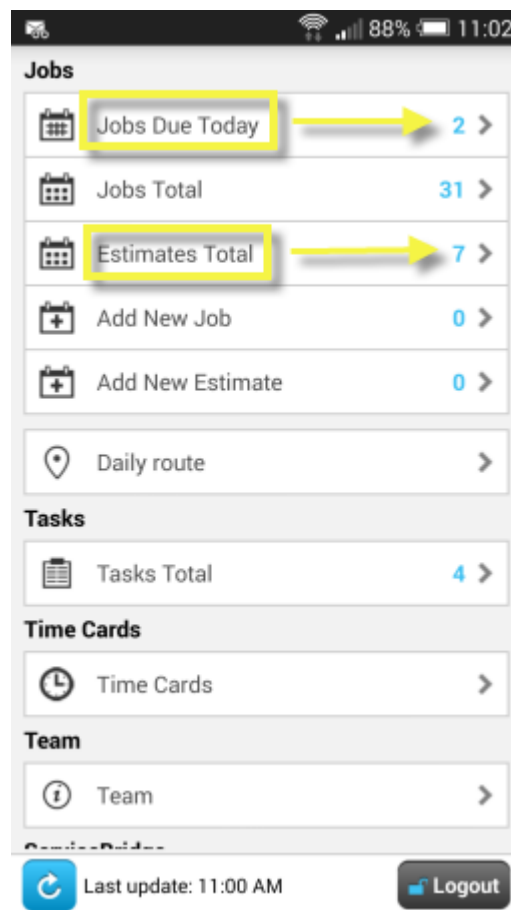
# Winning/Losing an Estimate

## Description

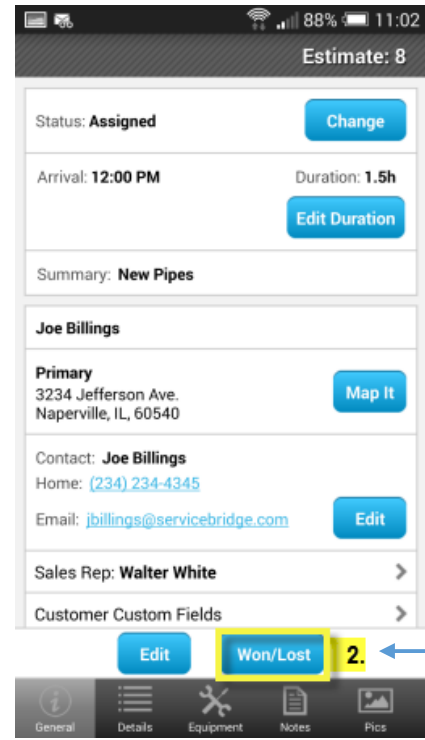
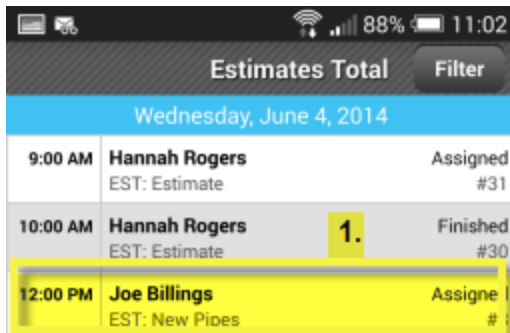
If you assign the estimate to yourself it will be displayed in your “Jobs Due Today” and “Estimate Total” in your ServiceBridge app. Also if an Estimate is assigned to you from ServiceCEO you will be allowed to win/lose the estimate.

## Win/Lose

From your dashboard you can view your estimates in the Jobs Due Today or the Estimates Total Tab.



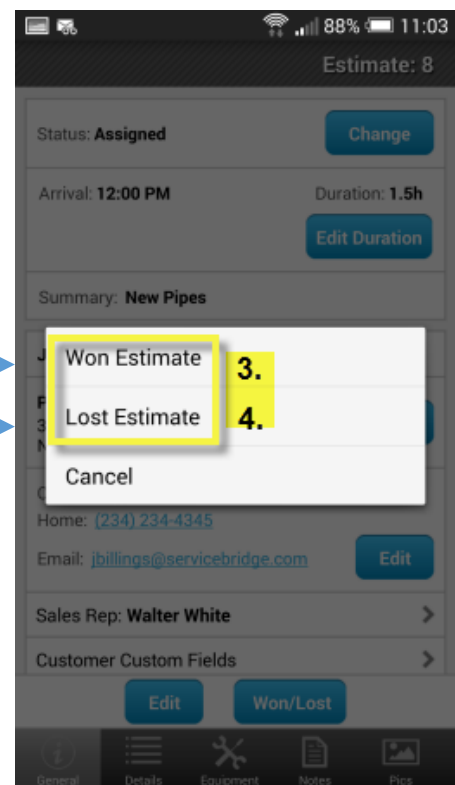
1. Find the Estimate you



2. Click on **Won/Lost** Estimate

3. Won Estimate

4. Lost Estimate



Once you click “Won Estimate” or “Lost Estimate” it will ask you to enter two things.

5. Give a **Reason** for the “Win” or “Loss”
6. Write any **Notes** you might want to have

Estimate: 8

Status: Assigned [Change](#)

Arrival: 12:00 PM Duration: 1.5h

**Win Explanation**

Please enter a reason as to why the customer wishes to accept the following services.

Reason: 5.

Estimate Won 0

Note: 6.

[Cancel](#) [Ok](#)

Customer Custom Fields >

[Edit](#) [Won/Lost](#)

General Details Equipment Notes Pics

7. Click **Submit** to finalize the Estimate

Estimate: 8

Customer: Joe Billings

Address: 3234 Jefferson Ave.  
Naperville, IL, 60540

Contact: Joe Billings  
Home: (234) 234-4345  
Email: jbillings@servicebridge.com

Customer Custom Fields >

Customer Notes >

Location Notes >

Start Date: Jun 4, 2014

7. [Submit](#) [Cancel](#)

General Details Equipment Notes Pics

8. Select **Yes** to turn it into a job.

Estimate: 8

Customer: Joe Billings

Address: 3234 Jefferson Ave.  
Naperville, IL, 60540

**Win Estimate**

This Estimate will be saved as won and a new job record will be created. Would you like to proceed with this operation?

No [Yes](#)

Location Notes >

Start Date: Jun 4, 2014

[Submit](#) [Cancel](#)

General Details Equipment Notes Pics

# Daily Route

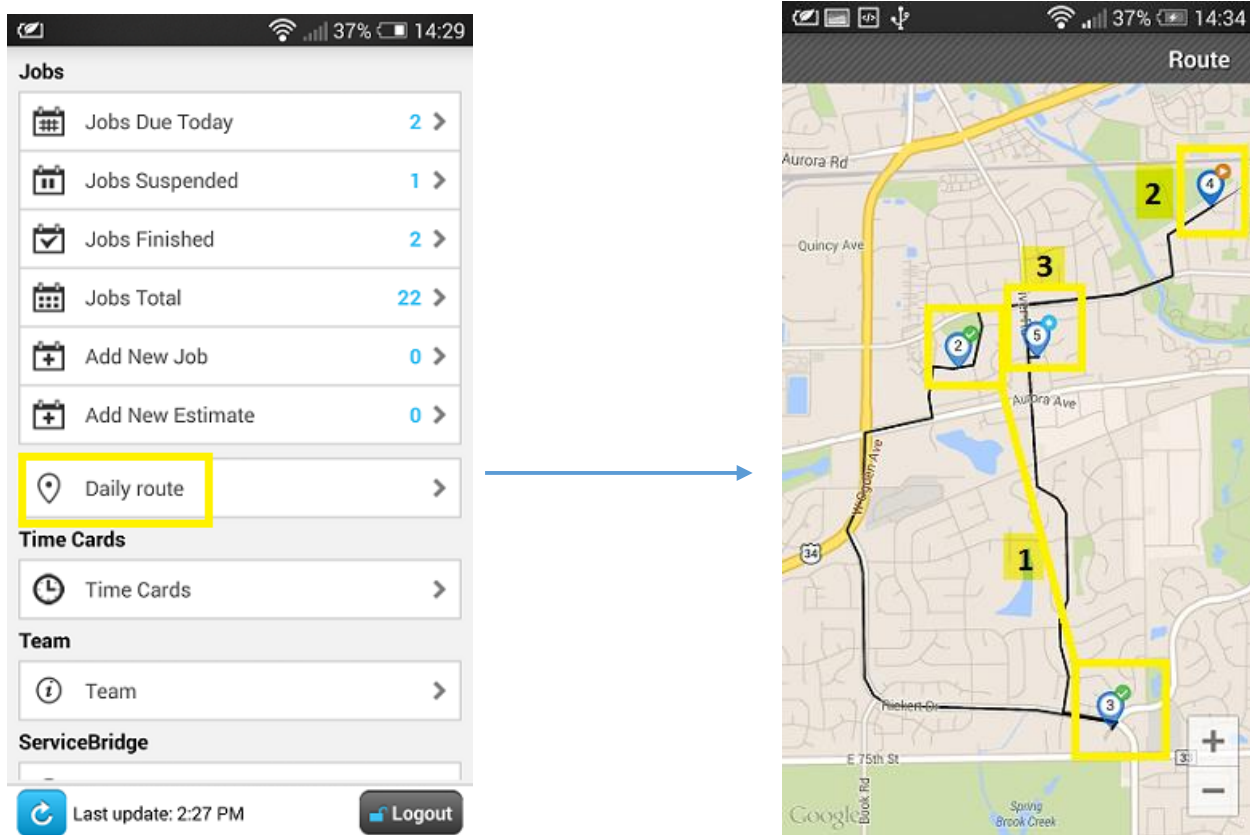
## Description

Daily Route feature displays job locations and fastest routes on an interactive map.

Daily Route feature can be accessed from the Dashboard of the ServiceBridge app.

**Note:** We recommend you to download the Google Maps app, however it will work with your regular Maps app as well.

## Daily Route View



1. The green check mark signifies that a job has been finished.

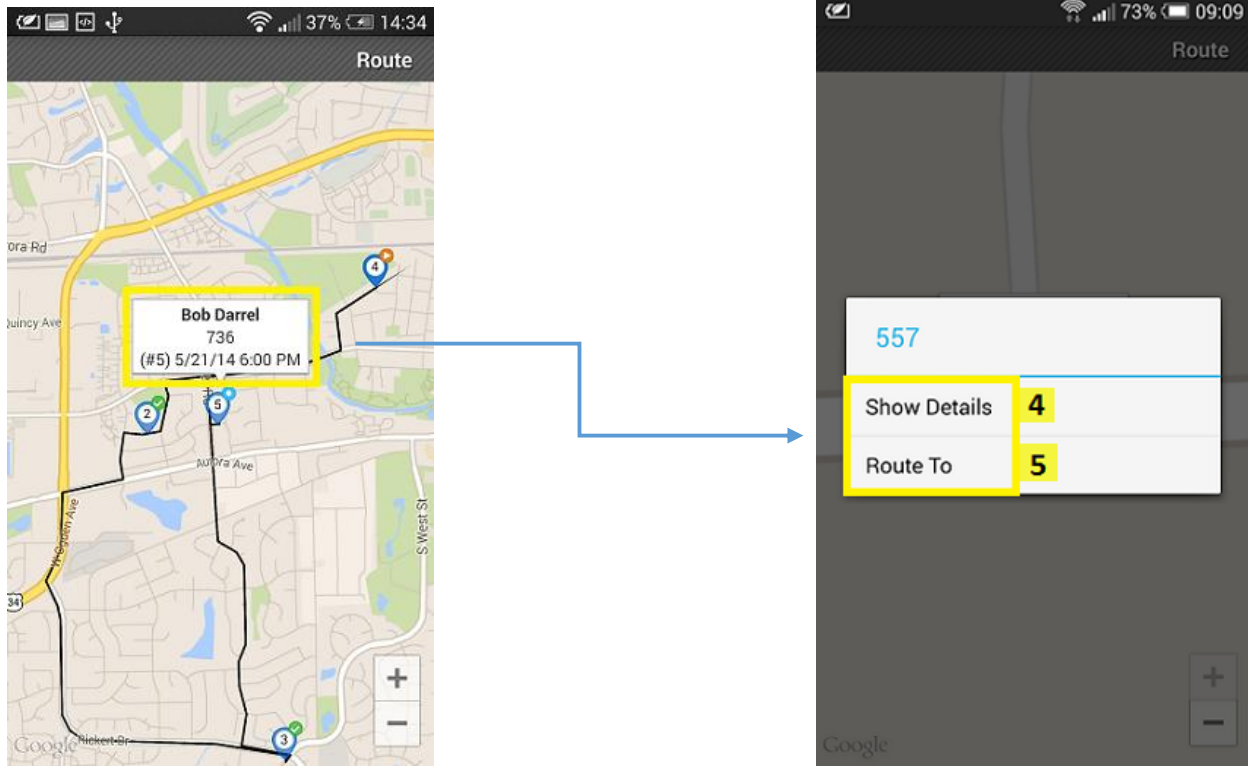
2. The orange triangle shows that a job is in-progress.

3. The blue circles show that the job is assigned.

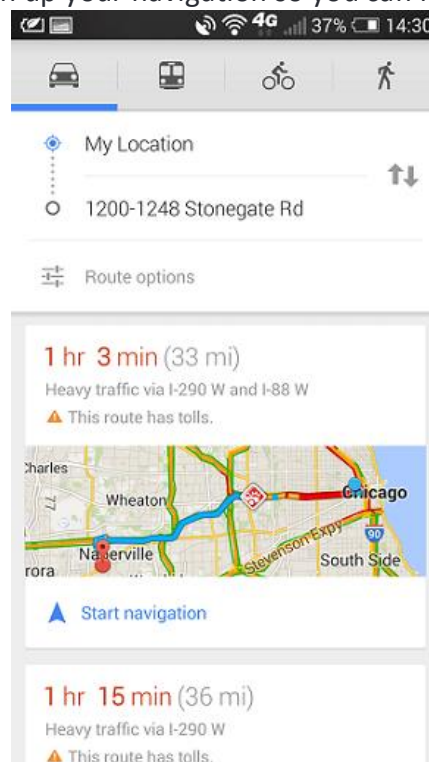
Suspended jobs will show up with a red X.

[Table of Contents](#)

You can click on a specific job and it will show you a box with minor details like the job number, date, and the time. Or, you can click on the box to open up more options:



4. You can click **Show Details** which will take you to general details of the job or,
5. **Route To** which will open up your navigation so you can navigate to that job.





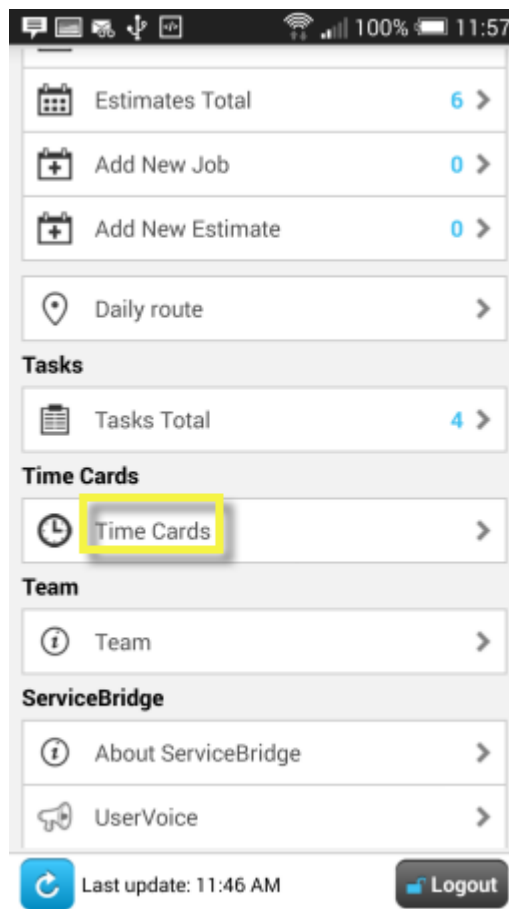
# Time Cards

## Description

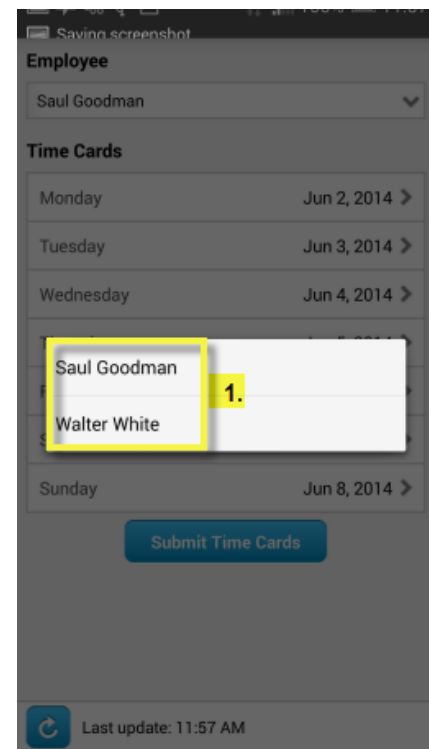
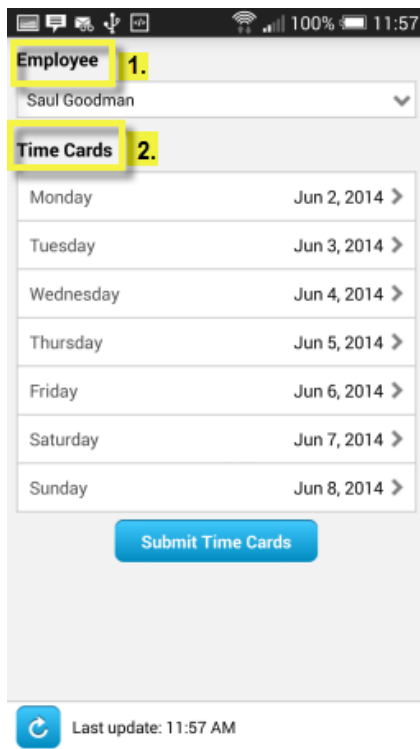
Time card functionality allows access to the time card information in ServiceCEO database from the app. Technician can edit time blocks that are automatically created based on his schedule, or add additional ones. All information is synced with ServiceCEO in real time.

## Accessing Time Cards

Open ServiceBridge application. Tap on the Time Cards button available in the dashboard to view the time cards for members of the team. If the button is not visible contact us to enable this feature for your account, or go to your ServicePortal and enable it in your company settings.



Choose the Time Card which you want to edit:



1. Tap on the employee and it will let you choose the team members time cards
2. The time cards are available Monday through Sunday for the ongoing week. Tap on a day you wish to see the time card information for.

Wednesday, June 4, 2014	
7:00 AM	<b>Job</b>
7:00 AM	Charlie Wang - - #194 - Cleaning
7:00 AM	<b>Travel</b>
8:00 AM	
8:00 AM	<b>On Clock</b>
7:00 PM	
8:00 AM	<b>Job</b>
9:30 AM	David Breighner - - #49 - Cleaning
9:30 AM	<b>Travel</b>
12:00 PM	
12:00 PM	<b>Job</b>
1:30 PM	Joe Billings - - #858 - New Pipes
12:25 PM	<b>Task</b>
2:25 PM	Cleaning
1:00 PM	<b>Job</b>
1:30 PM	Kyle Johnson - - #695 - Cleaning
1:30 PM	<b>Travel</b>
1:47 PM	
1:47 PM	<b>Job</b>
2:51 PM	Bryan Fuller - - #417 - Cleaning
2:51 PM	<b>Travel</b>
5:00 PM	
5:00 PM	<b>Job</b>
6:00 PM	Mary Smith - - #645 - Cleaning

## Edit Time Block

Time block values can also be edited. Tap on a time block your want to edit and detailed time block information will appear on the right.

The left screenshot shows a list of time blocks for Wednesday, June 4, 2014. The selected block is:

Time	Activity
7:00 AM	Job
7:00 AM	Charlie Wang - - #194 - Cleaning
7:00 AM	Travel
8:00 AM	On Clock
7:00 PM	
8:00 AM	Job
9:30 AM	David Breighner - - #49 - Cleaning
9:30 AM	Travel
12:00 PM	
12:00 PM	Job
1:30 PM	Joe Billings - - #858 - New Pipes
12:25 PM	Task
2:25 PM	Cleaning
1:00 PM	Job
1:30 PM	Kyle Johnson - - #695 - Cleaning
1:30 PM	Travel
1:47 PM	
1:47 PM	Job
2:51 PM	Bryan Fuller - - #417 - Cleaning
2:51 PM	Travel
5:00 PM	
5:00 PM	Job
6:00 PM	Mary Smith - - #645 - Cleaning

The right screenshot shows the edit form for the selected time block. The form includes the following fields:

- Time Start: 1.** 8:00 AM
- Time End: 2.** 9:30 AM
- Time Code: 3.** Job
- Role: 4.** General
- Description: 5.** David Breighner - - #49 - Cleaning

1. **Time Start** - Edit the start of the time.
2. **Time End** - Edit when you finished.
3. **Time Code** - Choose a time code.
4. **Role** - What kind of role was assigned.
5. **Description** - Description of what you were doing.

## Add New Time Block

To create a new time block, click on the “+” sign, and additional input fields will appear on the right. Fill the fields out and click save.

Wednesday, June 4, 2014

8:00 AM	<b>On Clock</b>
7:00 PM	
8:00 AM	<b>Job</b>
9:30 AM	David Breighner - - #49 - Cleaning
9:30 AM	<b>Travel</b>
12:00 PM	
12:00 PM	<b>Job</b>
1:30 PM	Joe Billings - - #858 - New Pipes
12:25 PM	<b>Task</b>
2:25 PM	Cleaning
1:00 PM	<b>Job</b>
1:30 PM	Kyle Johnson - - #695 - Cleaning
1:30 PM	<b>Travel</b>
1:47 PM	
1:47 PM	<b>Job</b>
2:51 PM	Bryan Fuller - - #417 - Cleaning
2:51 PM	<b>Travel</b>
5:00 PM	
5:00 PM	<b>Job</b>
6:00 PM	Mary Smith - - #645 - Cleaning
6:00 PM	<b>Travel</b>
7:00 PM	

**Add Time Block** **Process**

**Time Start: 1.** **Time End: 2.**

8:00 AM 9:30 AM

**Time Code: 3.**

**Role: 4.**

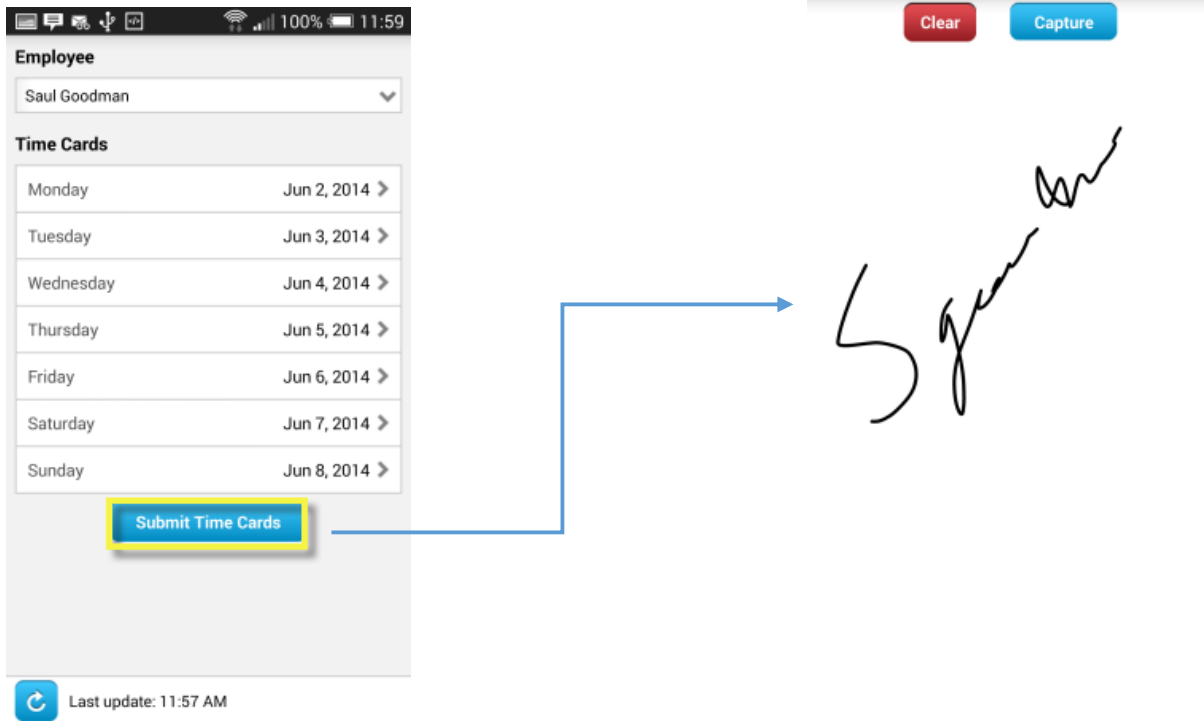
**Description: 5.**

**Save** **Cancel**

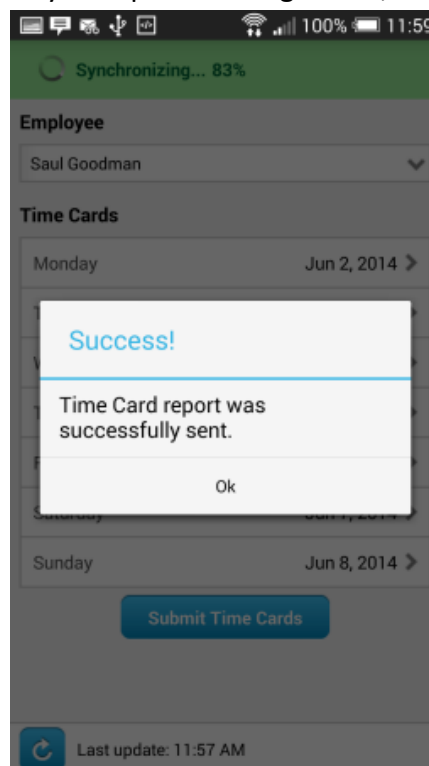
1. Time Start - Edit the start of the time.
2. Time End - Edit when you finished.
3. Time Code - Choose a time code.
4. Role - What kind of role was assigned.
5. Description - Description of what you were doing.

## Submitting Time Cards

When all time card values are correct tap on “Submit Time Cards” button to generate a professional report with embedded signature, and email it to the supervisor. Custom report templates can be customized based on your needs. Contact us for more information on customization.



Once you click “Submit Time Cards” and you capture the signature, it will tell you that your time card report was successfully saved.



## Viewing and Printing the Time Card Report

After you submit the time cards you will be able to view the time card report and be able to print it as a document.

**Employee**

Saul Goodman

**Time Cards**

Monday Jun 2, 2014 >

Tuesday Jun 3, 2014 >

Wednesday Jun 4, 2014 >

Thursday Jun 5, 2014 >

Friday Jun 6, 2014 >

Saturday Jun 7, 2014 >

Sunday Jun 8, 2014 >

**Print Time Cards**

**Submit Time Cards**

Last update: 11:57 AM

In the report you are able to view the date, in and out time, the description, work time, overtime, and the amount of travel for each day.

ServiceBridge  
1659 W Hubbard St.  
Chicago, IL 60622  
  
Phone: 312-858-3628  
Email: [david@servicebridge.com](mailto:david@servicebridge.com)

Employee: Dale Suter	
Period Start 6/2/2014	Period End 6/2/2014

### Monday, June 2, 2014

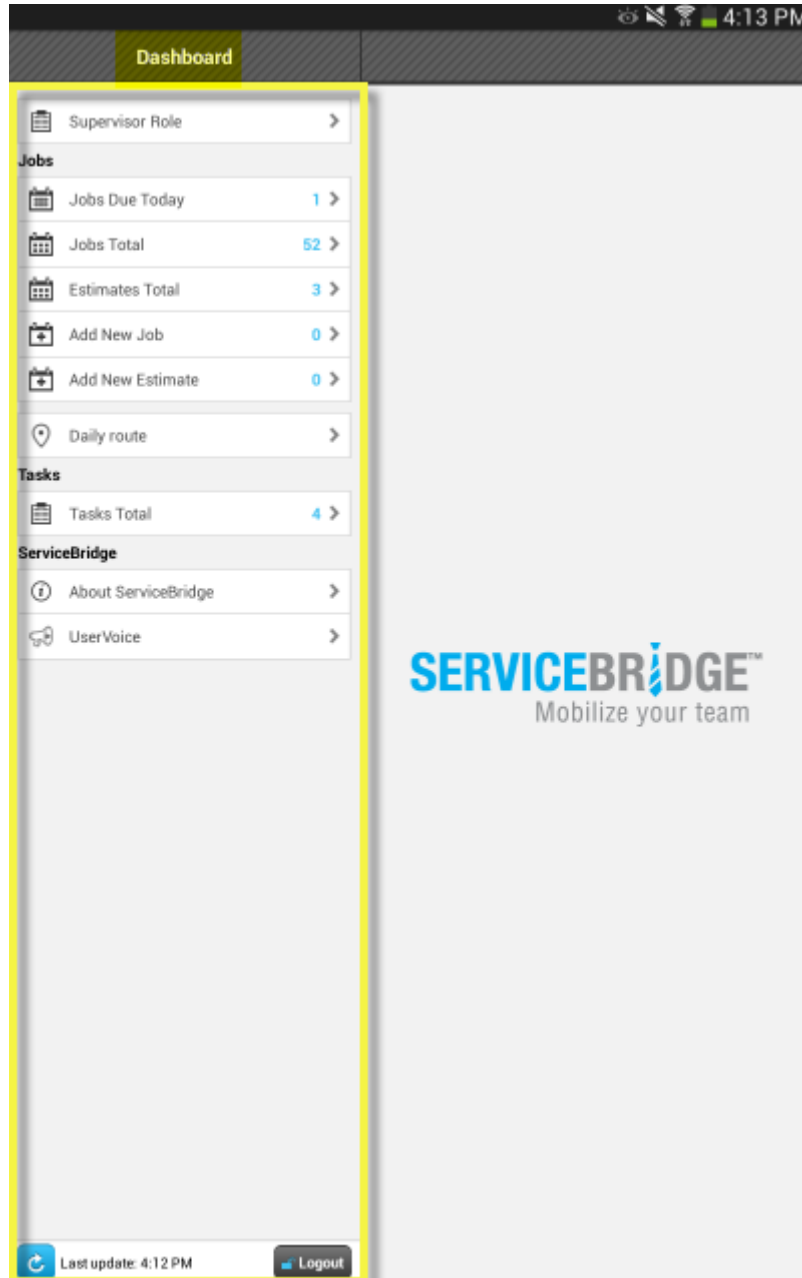
In	Out	Time Code	Description	Reg	OT	Travel
8:00 AM	7:00 PM	On Clock				
8:00 AM	10:00 AM	Travel				2.00
10:00 AM	10:15 AM	Job	Jeff Stevens - - #560 - Cleaning	0.25		
10:15 AM	11:10 AM	Travel				0.92
11:10 AM	11:20 AM	Job	Jim Beam - - #818 - Bathroom remodeling	0.17		
11:10 AM	11:19 AM	Job	Jim Beam - #818 - Bathroom remodeling	0.15		
11:20 AM	12:25 PM	Travel				1.08
12:25 PM	2:25 PM	Task	Cleaning	2.00		
12:30 PM	1:00 PM	Job	John Easy - - #739 - Cleaning	0.50		
1:00 PM	1:15 PM	Job	Kyle Johnson - - #621 - Cleaning	0.25		
2:25 PM	3:30 PM	Travel				1.08
3:30 PM	4:15 PM	Job	Jim Beam - - #738 - Cleaning	0.75		
4:15 PM	7:00 PM	Travel				2.75

**Totals:** 7.23 0.00 7.83

**Total Hours: 15.07**

# Tablet View

## Dashboard



You will have a split screen with an iPad where you will be able to view the dashboard on the left as well as the most recent thing you opened up on the right.

## Job/Estimate View

The screenshot displays a mobile application interface for managing jobs and estimates. The top bar shows the status bar with signal, Wi-Fi, and battery icons, and the time 5:30 PM. Below the status bar, there's a navigation bar with 'Dashboard', 'Supervisor Role', and 'Filter' buttons. The main content area is divided into two panels. The left panel shows a list of jobs, grouped by date ranges (e.g., 'Team 5 - Jun 6, 2014'). Each job entry includes a time, name, role, status, and ID. The right panel shows the details for 'Job: 840'. It includes a 'Team' dropdown (set to 'Team 5'), 'Start Date' (Jun 5, 2014), 'Start Time' (3:20 PM), and 'Status' (Assigned). Below these are sections for 'Summary: New Job', 'Jim Brown' (Primary contact), 'Contact: Jim Brown' (Home: (345) 434-5345, Email: jbrown@servicebridge.com), 'Sales Rep: Walter White', 'Customer Custom Fields', 'Customer Notes', 'Location Notes', 'Show History', 'Campaign: Newspaper Ad', 'Equipment: <None>', and 'Add New Estimate'. At the bottom, there's a toolbar with icons for General, Details, Equipment, Notes, Pics, and Sketch.

Time	Name	Role	Status	ID
3:20 PM	Jim Brown	WD: New Job	Assigned	#840
Team 5 - Jun 6, 2014				
12:00 PM	Kelly Walker	WD: Cleaning	Assigned	#447
Team 5 - Jun 7, 2014				
8:00 AM	Kelly Walker	WD: Cleaning	Assigned	#71
Team 5 - Jun 8, 2014				
8:00 AM	Hannah Rogers	EST: Estimate	Assigned	#31
Team 5 - Jun 9, 2014				
10:00 AM	Bryan Fuller	WD: Cleaning	Assigned	#418
12:00 PM	Kelly Walker	WD: Cleaning	Assigned	#448
4:54 PM	Mark Brooks	WD: New job	Suspended	#910
Team 5 - Jun 10, 2014				
10:49 AM	Kelly Walker	EST: Bathroom Remodeling	Suspended	#9
Team 5 - Jun 11, 2014				
8:00 AM	Kelly Walker	N: New Bathroom - 5	Assigned	#734-5
10:00 AM	Kyle Johnson	WD: New Toilet	Assigned	#76
Team 5 - Jun 12, 2014				
8:00 AM	Hannah Rogers	EST: Estimate	Assigned	#31
12:00 PM	Kelly Walker	WD: Cleaning	Assigned	#449
3:20 PM	Jim Brown	WD: New Job	Assigned	#841
Team 5 - Jun 14, 2014				
8:00 AM	Kelly Walker	WD: Cleaning	Assigned	#72
10:00 AM	Bryan Fuller	WD: Cleaning	Assigned	#419
2:00 PM	Kyle Johnson	EST: Bathroom Remodeling	Assigned	#10
Team 5 - Jun 15, 2014				
12:00 PM	Kelly Walker	WD: Cleaning	Assigned	#450
Team 5 - Jun 16, 2014				
8:00 AM	Mary Smith	EST: Hot Tub Installation	Assigned	#11
8:00 AM	Hannah Rogers	EST: Estimate	Assigned	#31

From a specific job you will be able to view all of the jobs tab including:

- [General](#)
- [Details](#)
- [Equipment](#)
- [Notes](#)
- [Pics](#)
- [Sketch](#)
- [Signature](#)
- [Fields](#)
- [Documents](#)



## General

**Supervisor Role**

**Job: 840**

Time	Supervisor	Role	Status	Assigned To
3:20 PM	Jim Brown	WD: New Job	Assigned	#840
Team 5 - Jun 6, 2014				
12:00 PM	Kelly Walker	WD: Cleaning	Assigned	#447
Team 5 - Jun 7, 2014				
8:00 AM	Kelly Walker	WD: Cleaning	Assigned	#71
Team 5 - Jun 8, 2014				
8:00 AM	Hannah Rogers	EST: Estimate	Assigned	#31
Team 5 - Jun 9, 2014				
10:00 AM	Bryan Fuller	WD: Cleaning	Assigned	#418
12:00 PM	Kelly Walker	WD: Cleaning	Assigned	#463
4:54 PM	Mark Brooks	WD: New Job	Suspended	#910
Team 5 - Jun 10, 2014				
10:49 AM	Kelly Walker	EST: Bathroom Remodeling	Suspended	#9
Team 5 - Jun 11, 2014				
8:00 AM	Kelly Walker	V: New Bathroom - 5	Assigned	#734-5
10:00 AM	Kyle Johnson	WD: New Toilet	Assigned	#76
Team 5 - Jun 12, 2014				
8:00 AM	Hannah Rogers	EST: Estimate	Assigned	#31
12:00 PM	Kelly Walker	WD: Cleaning	Assigned	#449
3:20 PM	Jim Brown	WD: New Job	Assigned	#841
Team 5 - Jun 14, 2014				
8:00 AM	Kelly Walker	WD: Cleaning	Assigned	#72
10:00 AM	Bryan Fuller	WD: Cleaning	Assigned	#419
2:00 PM	Kyle Johnson	EST: Bathroom Remodeling	Assigned	#10
Team 5 - Jun 15, 2014				
12:00 PM	Kelly Walker	WD: Cleaning	Assigned	#450
Team 5 - Jun 16, 2014				
8:00 AM	Mary Smith	EST: Hot Tub Installation	Assigned	#11
8:00 AM	Hannah Rogers	EST: Estimate	Assigned	#31

**Job Details:**

Team: Team 5

Start Date: Jun 5, 2014

Start Time: 3:20 PM

Status: Assigned

Summary: New Job

**Jim Brown**

Primary  
4499 Keller St.  
Lisle, IL, 60563  
[Map It](#)

Contact: Jim Brown  
Home: [\(345\) 434-5345](#)  
Email: [jbrown@servicebridge.com](mailto:jbrown@servicebridge.com)  
[Edit](#)

Sales Rep: Walter White

Customer Custom Fields

Customer Notes

Location Notes

Show History

Campaign: Newspaper Ad

Equipment: <None> [Edit](#)

[Add New Estimate](#)

**General** Details Equipment Notes Pics Sketch Sign

From the **General Tab** you will be able to view all of the information about the job including Status, Time, Summary, the customer and their information, customer custom fields, customer notes, location notes, knowledge assets, job tasks, job custom forms, and history.

## Details

**Supervisor Role**

**Job: 840**

Time	Supervisor	Role	Status	Assigned To
3:20 PM	Jim Brown	WD: New Job	Assigned	#840
Team 5 - Jun 6, 2014				
12:00 PM	Kelly Walker	WD: Cleaning	Assigned	#447
Team 5 - Jun 7, 2014				
8:00 AM	Kelly Walker	WD: Cleaning	Assigned	#71
Team 5 - Jun 8, 2014				
8:00 AM	Hannah Rogers	EST: Estimate	Assigned	#31
Team 5 - Jun 9, 2014				
10:00 AM	Bryan Fuller	WD: Cleaning	Assigned	#418
12:00 PM	Kelly Walker	WD: Cleaning	Assigned	#448
4:54 PM	Mark Brooks	WD: New Job	Suspended	#910
Team 5 - Jun 10, 2014				
10:49 AM	Kelly Walker	EST: Bathroom Remodeling	Suspended	#9
Team 5 - Jun 11, 2014				
8:00 AM	Kelly Walker	V: New Bathroom - 5	Assigned	#734-5
10:00 AM	Kyle Johnson	WD: New Toilet	Assigned	#76
Team 5 - Jun 12, 2014				
8:00 AM	Hannah Rogers	EST: Estimate	Assigned	#31
12:00 PM	Kelly Walker	WD: Cleaning	Assigned	#449
3:20 PM	Jim Brown	WD: New Job	Assigned	#841
Team 5 - Jun 14, 2014				
8:00 AM	Kelly Walker	WD: Cleaning	Assigned	#72
10:00 AM	Bryan Fuller	WD: Cleaning	Assigned	#419
2:00 PM	Kyle Johnson	EST: Bathroom Remodeling	Assigned	#10
Team 5 - Jun 15, 2014				
12:00 PM	Kelly Walker	WD: Cleaning	Assigned	#450
Team 5 - Jun 16, 2014				
8:00 AM	Mary Smith	EST: Hot Tub Installation	Assigned	#11
8:00 AM	Hannah Rogers	EST: Estimate	Assigned	#31

Products	Qty	Price	Total
567324152 - New Toilet 1	1	\$250.00	\$250.00
Services			
Kitchen Estimate	1	\$36.00	\$36.00
Kits			
Kitchen Installation 1 Kitchen installation 1	1		
3424234 - 5 ft. Pipe	1	\$8.00	\$8.00
836193719 - New Sink 1	1	\$250.00	\$250.00
4332312 - Thin PVC Piping	1	\$25.00	\$25.00
Installation of Kitchen Sink	1	\$18.00	\$18.00

Price Level: Cleaning Special

Subtotal: \$587.00  
Tax: \$0.00  
Total: \$587.00

Buttons: Add, Collect payment, Details (highlighted), General, Equipment, Notes, Price, Sketch, Sign

From the **Details Tab** you will be able to view all of the products/service/kits, as well as add new ones, add price levels, collect payment, and view the total amount owed.

## Equipment

The screenshot shows a mobile application interface. At the top, there's a status bar with the time 5:31 PM. Below it, a header bar contains 'Dashboard', 'Supervisor Role', 'Filter', 'Job: 840', and a 'New Equipment' button. The main content area is a list of tasks, each with a time, name, role, and status. The tasks are grouped by dates from June 6 to June 16, 2014. At the bottom, there's a navigation bar with icons for 'General', 'Details', 'Equipment', 'Notes', 'Pics', 'Sketch', and 'Sup'. The 'Equipment' icon is highlighted with a yellow box. A blue arrow points from the text below to this icon.

Time	Name	Role	Status
3:20 PM	Jim Brown	Assigned #840	
Team 5 - Jun 6, 2014			
12:00 PM	Kelly Walker	Assigned #447	
Team 5 - Jun 7, 2014			
8:00 AM	Kelly Walker	Assigned #71	
Team 5 - Jun 8, 2014			
8:00 AM	Hannah Rogers	Assigned #31	
Team 5 - Jun 9, 2014			
10:00 AM	Bryan Fuller	Assigned #418	
12:00 PM	Kelly Walker	Assigned #448	
4:54 PM	Mark Brooks	Suspended #910	
Team 5 - Jun 10, 2014			
10:49 AM	Kelly Walker	Suspended #9	
Team 5 - Jun 11, 2014			
8:00 AM	Kelly Walker	Assigned #734-5	
10:00 AM	Kyle Johnson	Assigned #76	
Team 5 - Jun 12, 2014			
8:00 AM	Hannah Rogers	Assigned #31	
12:00 PM	Kelly Walker	Assigned #449	
3:20 PM	Jim Brown	Assigned #841	
Team 5 - Jun 14, 2014			
8:00 AM	Kelly Walker	Assigned #72	
10:00 AM	Bryan Fuller	Assigned #419	
2:00 PM	Kyle Johnson	Assigned #10	
Team 5 - Jun 15, 2014			
12:00 PM	Kelly Walker	Assigned #450	
Team 5 - Jun 16, 2014			
8:00 AM	Mary Smith	Assigned #11	
8:00 AM	Hannah Rogers	Assigned #31	

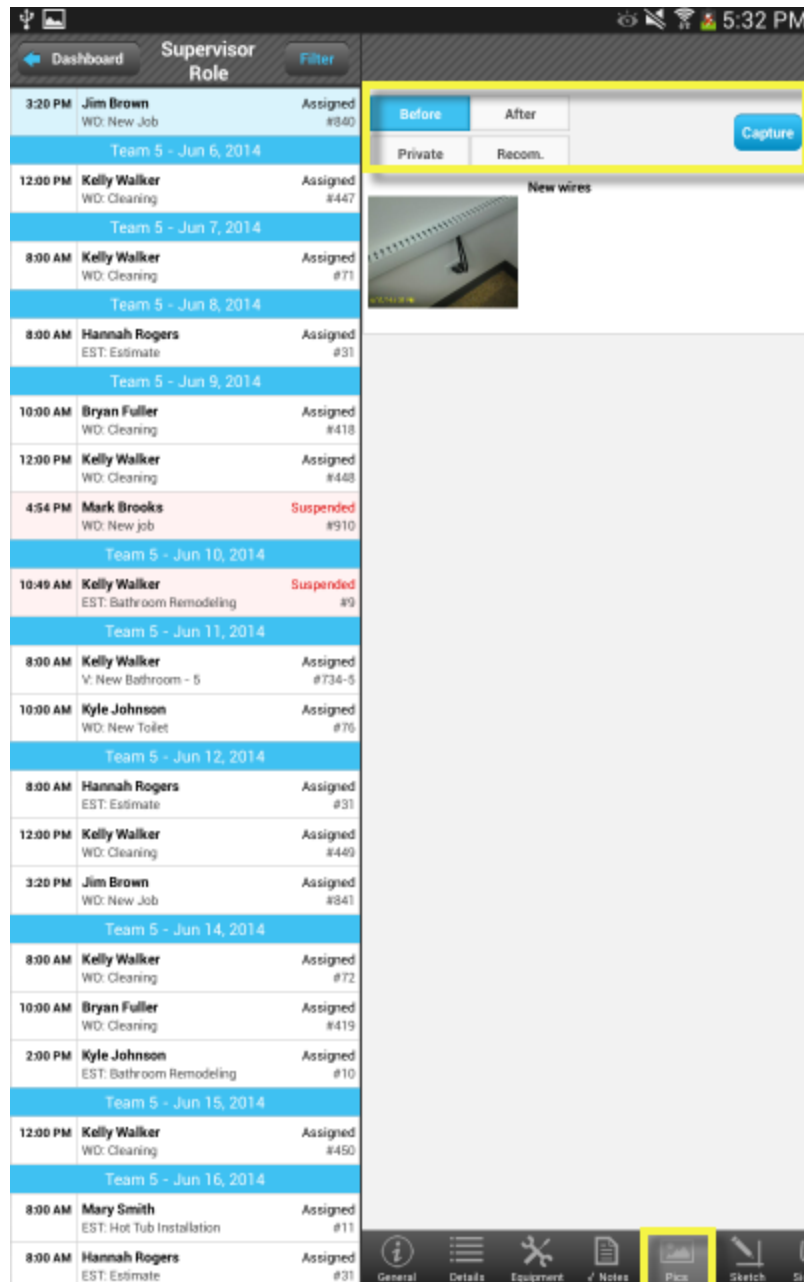
The **Equipment Tab** lets you view and install equipment, as well as edit the information about the installed equipment.

## Notes



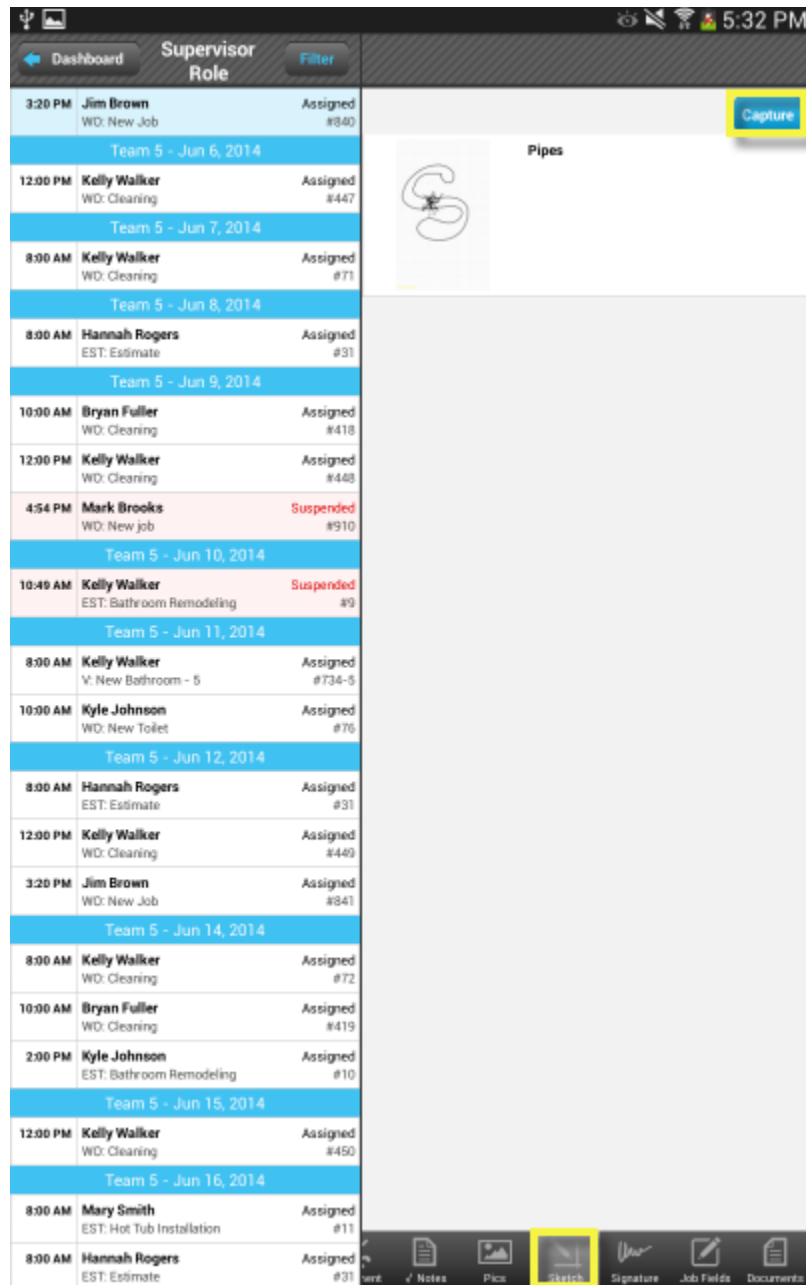
From the **Notes Tab** you will be able to write down notes for the work order, invoice, and private that only you and your company will see. The customer does not see private notes.

## Pics



From the **Pics Tab** you will be able to view, add, and delete photos. You can place pictures in the before, after, private, and recommendation tabs. To add a picture click capture in the top right hand corner. You are also able to add notes next to the picture to ensure the person knows what the picture is about.

## Sketch



The **Sketch Tab** lets you draw a sketch of anything you would like and then write down notes to describe it.

## Signature



From the **Signature Tab** you are able to capture the customers' signature. You can click "New Signature" in the top right hand corner which will open up a black screen where you can draw the signature. After you draw the signature it can ask you to write down the customers' name for verification.

## Fields

The screenshot displays the ServiceCEO Supervisor Role interface. The top bar shows 'Dashboard', 'Supervisor Role', and 'Filter' buttons, along with the 'Job: 840' identifier. The main area is a list of job assignments for 'Team 5' across various dates in June 2014. Each entry includes a time, a name, a role, and an assigned status. A 'Fields' tab is highlighted at the bottom, and a blue arrow points from it to the 'Fields' section on the right. The 'Fields' section contains three questions with dropdown menus for 'No' or 'Yes' answers.

Time	Name	Role	Status
3:20 PM	Jim Brown	WD: New Job	Assigned #840
Team 5 - Jun 6, 2014			
12:00 PM	Kelly Walker	WD: Clearing	Assigned #447
Team 5 - Jun 7, 2014			
8:00 AM	Kelly Walker	WD: Clearing	Assigned #71
Team 5 - Jun 8, 2014			
8:00 AM	Hannah Rogers	EST: Estimate	Assigned #31
Team 5 - Jun 9, 2014			
10:00 AM	Bryan Fuller	WD: Clearing	Assigned #418
12:00 PM	Kelly Walker	WD: Clearing	Assigned #448
4:54 PM	Mark Brooks	WD: New job	Suspended #910
Team 5 - Jun 10, 2014			
10:49 AM	Kelly Walker	EST: Bathroom Remodeling	Suspended #9
Team 5 - Jun 11, 2014			
8:00 AM	Kelly Walker	V: New Bathroom - 5	Assigned #734-5
10:00 AM	Kyle Johnson	WD: New Toilet	Assigned #76
Team 5 - Jun 12, 2014			
8:00 AM	Hannah Rogers	EST: Estimate	Assigned #31
12:00 PM	Kelly Walker	WD: Clearing	Assigned #449
3:20 PM	Jim Brown	WD: New Job	Assigned #841
Team 5 - Jun 14, 2014			
8:00 AM	Kelly Walker	WD: Clearing	Assigned #72
10:00 AM	Bryan Fuller	WD: Clearing	Assigned #419
2:00 PM	Kyle Johnson	EST: Bathroom Remodeling	Assigned #10
Team 5 - Jun 15, 2014			
12:00 PM	Kelly Walker	WD: Clearing	Assigned #450
Team 5 - Jun 16, 2014			
8:00 AM	Mary Smith	EST: Hot Tub Installation	Assigned #11
8:00 AM	Hannah Rogers	EST: Estimate	Assigned #31

**Fields**

New Customer?

Job Completed?

New Equipment Installed?

**Fields Tab**

From the **Fields Tab** you can customize any additional information you want to add for the job from ServiceCEO. Once you add these questions or information it can show up in the fields tab.



## Documents

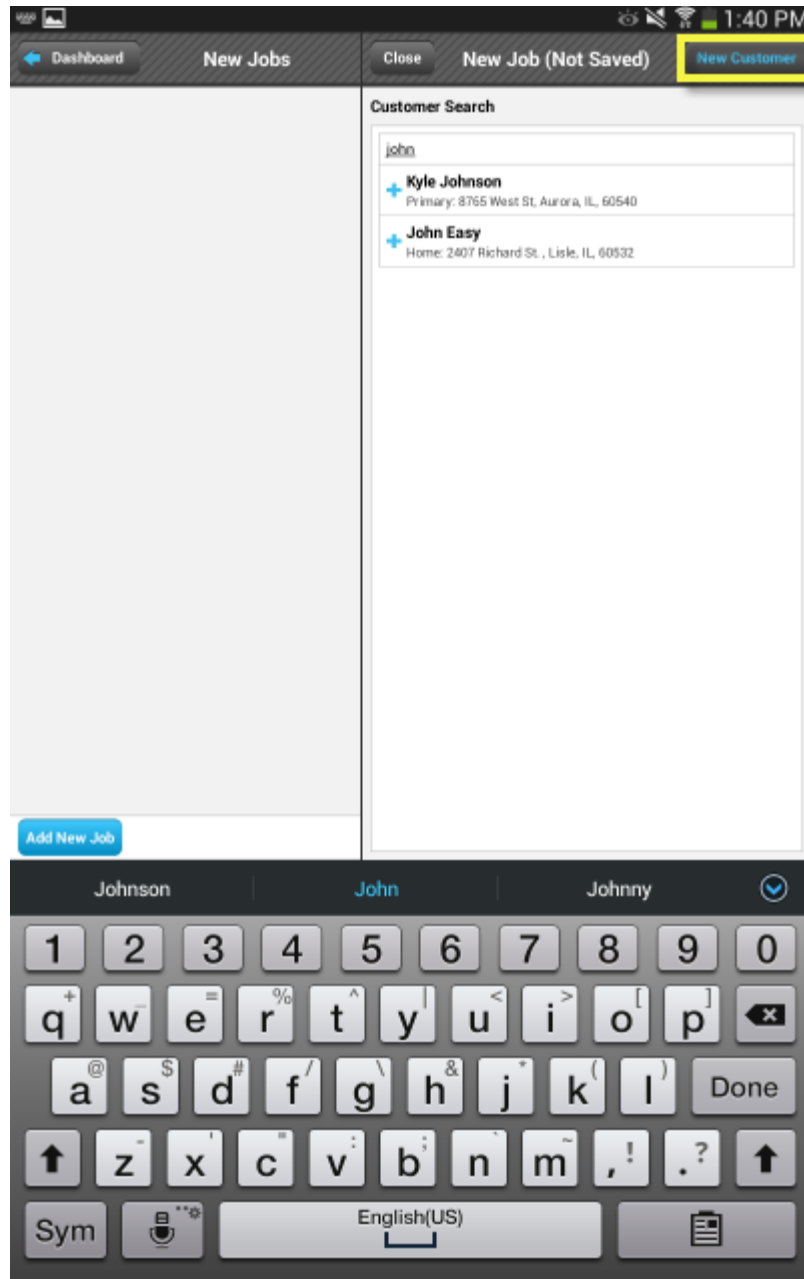
Supervisor Role				Job: 840	
3:20 PM	Jim Brown	Assigned	#840	Thursday, June 5, 2014	
Team 5 - Jun 5, 2014				EST Job-Estimate-32.pdf	#32
12:00 PM	Kelly Walker	Assigned	#447	Wednesday, May 28, 2014	
Team 5 - Jun 7, 2014				EST Job-Estimate-22.pdf	#22
8:00 AM	Kelly Walker	Assigned	#71	Thursday, May 22, 2014	
Team 5 - Jun 8, 2014				EST Job-Estimate-16.pdf	#16
8:00 AM	Hannah Rogers	Assigned	#31	EST Job-Estimate-16.pdf	#16
Team 5 - Jun 9, 2014				EST Job-Estimate-15.pdf	#15
10:00 AM	Bryan Fuller	Assigned	#418	No more items	
12:00 PM	Kelly Walker	Assigned	#448		
4:54 PM	Mark Brooks	Suspended	#910		
Team 5 - Jun 10, 2014					
10:49 AM	Kelly Walker	Suspended	#9		
Team 5 - Jun 11, 2014					
8:00 AM	Kelly Walker	Assigned	#734-5		
10:00 AM	Kyle Johnson	Assigned	#76		
Team 5 - Jun 12, 2014					
8:00 AM	Hannah Rogers	Assigned	#31		
12:00 PM	Kelly Walker	Assigned	#449		
3:20 PM	Jim Brown	Assigned	#841		
Team 5 - Jun 14, 2014					
8:00 AM	Kelly Walker	Assigned	#72		
10:00 AM	Bryan Fuller	Assigned	#419		
2:00 PM	Kyle Johnson	Assigned	#10		
Team 5 - Jun 15, 2014					
12:00 PM	Kelly Walker	Assigned	#450		
Team 5 - Jun 16, 2014					
8:00 AM	Mary Smith	Assigned	#11		
8:00 AM	Hannah Rogers	Assigned	#31		

The **Documents Tab** lets you view all of the previous documents from this customer. You can click on the document and it will open it up.

## Adding a Job or Estimate

Once you click Add New Job or Add New Estimate, it will take you to a window to enter all of the information.

1. First you Search for the customer, or add a new one. To search for an existing one simply enter the first 3 letters of the name. To add a new one just click “New Customer”.



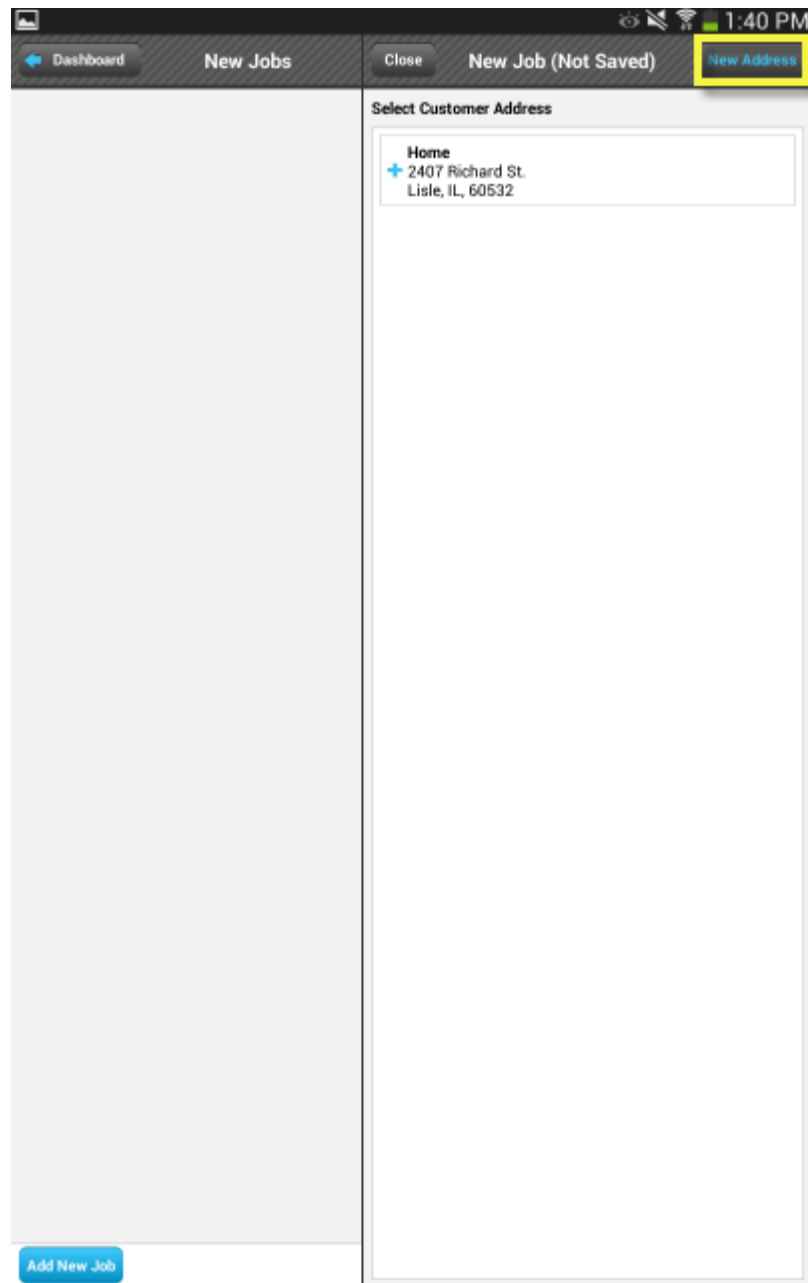
The screenshot shows a mobile application interface with a top navigation bar containing 'Dashboard', 'New Jobs', and 'New Job (Not Saved)' buttons. A 'New Customer' form is displayed, highlighted with a yellow border. The form includes the following fields:

- Customer Type: Individual (dropdown)
- First Name: (text input)
- Last Name: (text input)
- Address Name: Primary (dropdown)
- Address: (text input)
- City: (text input)
- State: (text input)
- Zip Code: (text input)
- Zone: <None> (dropdown)
- Map Code: (text input)
- Access: (text input)
- Taxes: Federal (dropdown), Illinois (dropdown), Local: <None> (dropdown)
- Contact Name: (text input)
- Email: (text input)

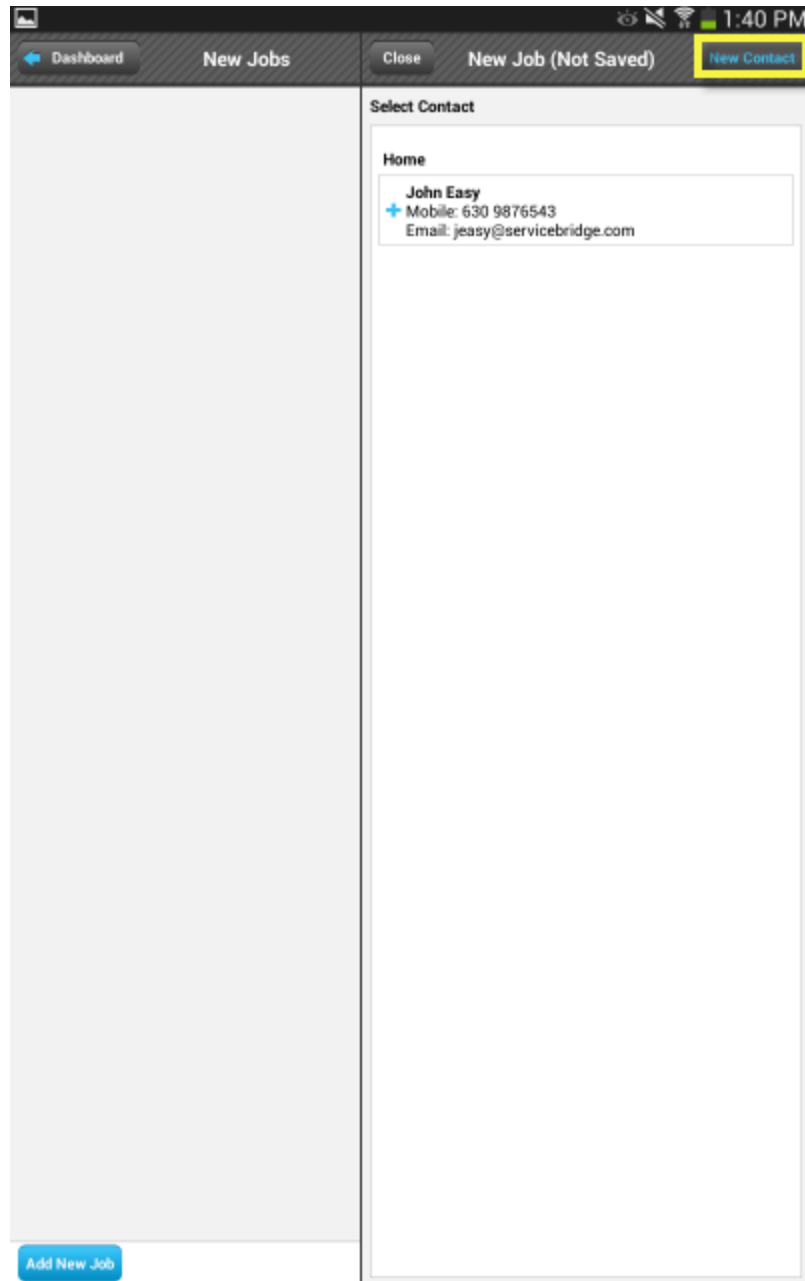
A blue arrow points to the 'Zone' field. At the bottom left, there is a blue button labeled 'Add New Job'.

If you click “New Customer” you will be able to add a new one to your database. It will ask you to enter all of the information about the new customer like, customer type, company name, location, zone, tax codes, etc.

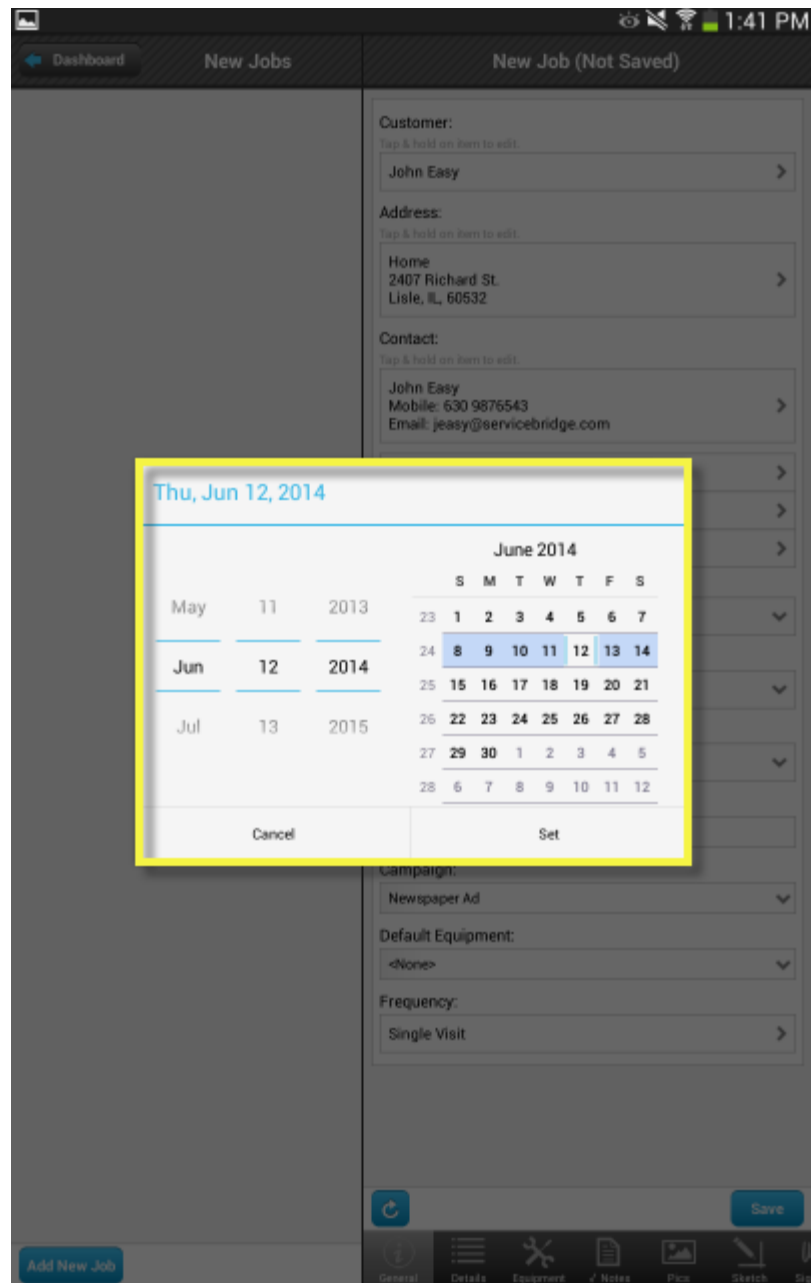
2. Select the Address or enter a new one by clicking on “New Address”.



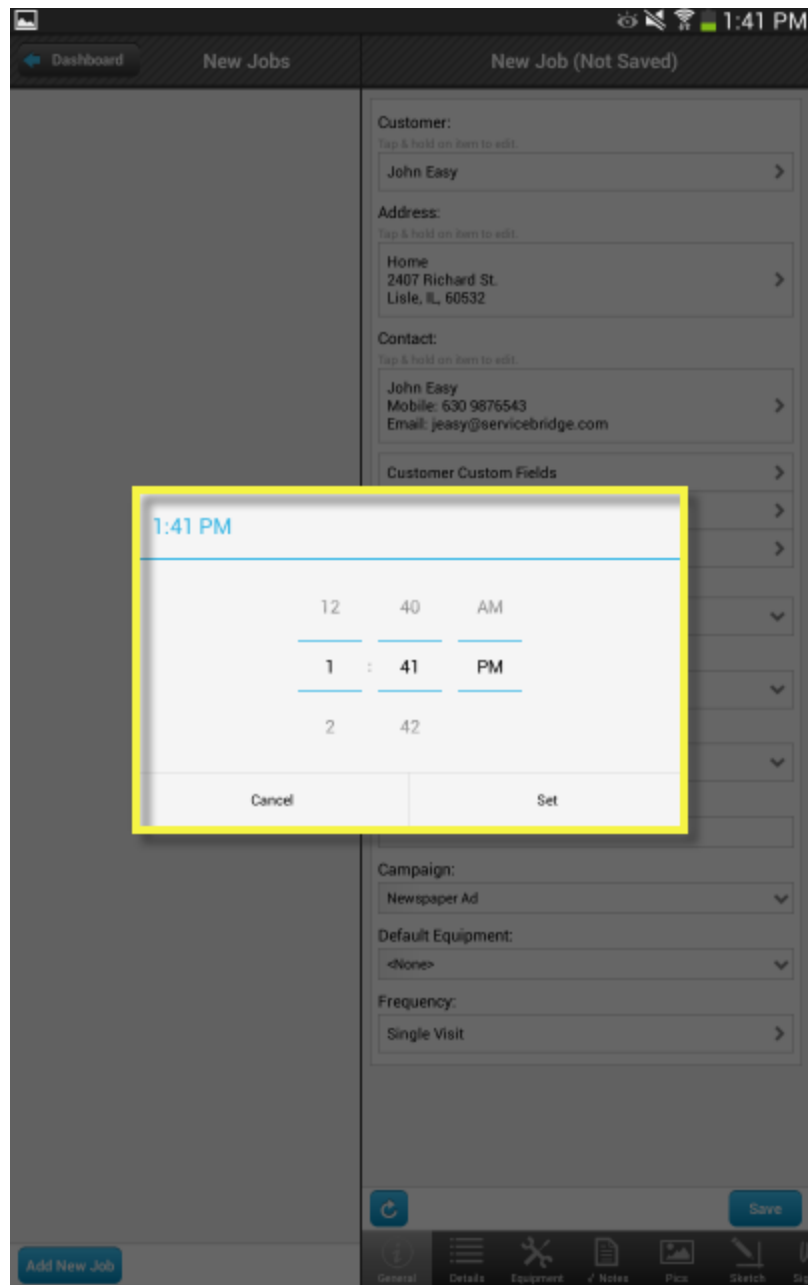
3. Select the contact or click on “New Contact” to enter a new one.



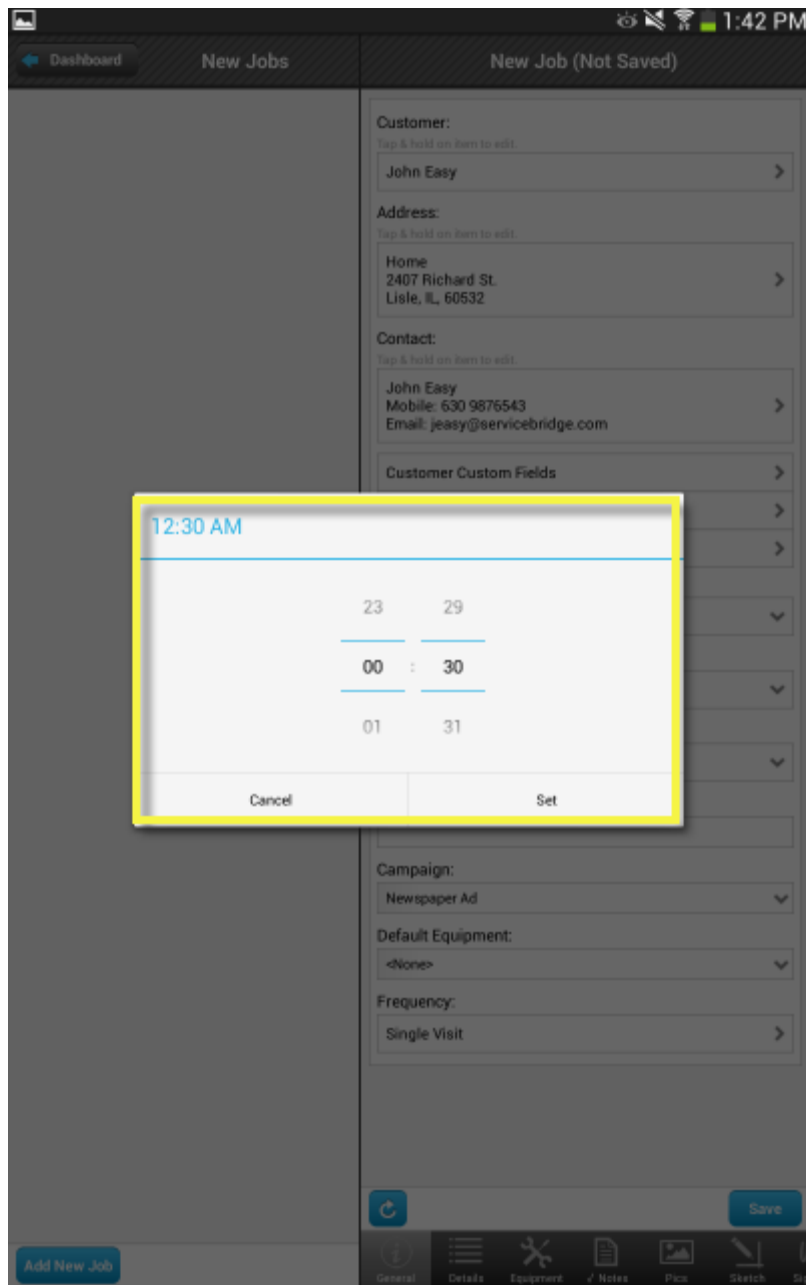
#### 4. Select the Start Date



5. Select the Start Time



6. Select the Estimated Duration





7. Enter the Summary of the Job/Estimate

The screenshot shows a mobile application interface for managing jobs. The top status bar displays the time as 1:42 PM. The app has a dark header with a 'Dashboard' button and two main sections: 'New Jobs' and 'New Job (Not Saved)'. The 'New Job (Not Saved)' section contains the following fields:

- Customer:** A text field with 'John Easy' and a right arrow icon. Below it is a hint: 'Tap & hold on item to edit.'
- Address:** A text field with 'Home', '2407 Richard St.', and 'Lisle, IL, 60532' and a right arrow icon. Below it is a hint: 'Tap & hold on item to edit.'
- Contact:** A text field with 'John Easy', 'Mobile: 630 9876543', and 'Email: jeasy@servicebridge.com' and a right arrow icon. Below it is a hint: 'Tap & hold on item to edit.'
- Customer Custom Fields:** A text field with a right arrow icon.
- Customer Notes:** A text field with a right arrow icon.
- Location Notes:** A text field with a right arrow icon.
- Start Date:** A date picker showing 'Jun 12, 2014' and a dropdown arrow.
- Start Time:** A time picker showing '2:40 PM' and a dropdown arrow.
- Estimated Duration:** A text field showing '30 Minutes' and a dropdown arrow.
- Summary:** A highlighted yellow text field.

At the bottom of the 'New Job (Not Saved)' section, there are two buttons: 'Add New Job' and 'Save'. A keyboard is visible at the bottom of the screen, showing the URL 'https' and the text 'ser'.

8. Add the campaign if there was one or the marketing strategy used to get the client.

The screenshot shows a mobile application interface for adding a new job. The top navigation bar includes 'Dashboard', 'New Jobs', and 'New Job (Not Saved)'. The main form area is divided into two columns. The right column contains fields for 'Customer' (John Easy), 'Address' (Home, 2407 Richard St., Lisle, IL, 60532), 'Contact' (John Easy, Mobile: 630 9876543, Email: jeasy@servicebridge.com), and 'Customer Custom Fields'. A 'Campaign' dropdown menu is open, showing options: '<None>' (selected), 'Newspaper Ad', 'Radio Ad 103.5', and 'Yellow Pages Local'. Below the dropdown, there are fields for 'Campaign' (set to '<None>'), 'Default Equipment' (set to '<None>'), and 'Frequency' (Single Visit). At the bottom, there is a 'Save' button and a navigation bar with icons for 'General', 'Details', 'Equipment', 'Notes', 'Pic', 'Sketch', and 'Log'.

Customer: John Easy

Address: Home, 2407 Richard St., Lisle, IL, 60532

Contact: John Easy, Mobile: 630 9876543, Email: jeasy@servicebridge.com

Customer Custom Fields

Campaign: <None>

Default Equipment: <None>

Frequency: Single Visit

Save

9. Frequency lets you select how often the visit will be done. You can select from a single visit, daily, weekly, monthly, annually, or custom.

