
ServMan Software

**ServMan Mobile Application
User Manual**

Version <1.9>

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Revision History

Date	Version	Description	Author
8/21/2002	1.0	Initial Version	Ralph Warner
11/15/2002	1.1	Updated	Ralph Warner
2/11/2003	1.2	Updated	Ralph Warner
5/5/2003	1.3	Updated – Added Template Items, Update Flat Rate Items, Added Status Sync, Added Real-time Account History and Driving Directions Look-up.	Ralph Warner
6/25/2003	1.4	Updated – Added to General tab features, updated screen shots.	Ralph Warner
7/31/2003	1.5	Updated – Added to General tab, Client Info tabs. Updated screen shots.	Ralph Warner
5/19/2004	1.6	Updated screen shots and features.	Ralph Warner
7/21/2004	1.7	Updated features	Ralph Warner
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3/2/2005	1.9	Updated Features for Time Clock Module, attaching images to work orders, and exporting/importing settings	Ralph Warner
3/9/2005	1.10	Added Critical Notes	Ralph Warner

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1. Critical Notes

Synchronization Process

When using ServMan Mobile, it is recommended ServMan users do not modify work orders that ServMan Mobile users may also be modifying. ServMan Mobile may overwrite modifications made in ServMan while if the order was modified in ServMan while the order was also on a user's device in ServMan Mobile.

Example: The request field of an order is modified in ServMan after the order has been downloaded to ServMan Mobile. The request field may have been previously blank, and a ServMan user enters text into the Request field and saves the order. When the order is synchronized from ServMan Mobile, the mobile order's request field is blank, or may have been modified by the ServMan Mobile user, so will overwrite what the ServMan user had entered.

Example 2: A line item is deleted on an order in ServMan after the order has been downloaded to ServMan Mobile. The line item is not deleted in ServMan Mobile, and the order is synchronized. The synchronization process will not find the deleted line item on the order, so it will assume it needs to add the line item back to the order.

2. Minimum Requirements

Recommended Hardware / Software

Server: Separate workstation running Microsoft Windows 2000 or Windows 2003 Server.
FTP service enable with username and password.

Device:

Ruggedized Windows CE 3.0 / Pocket PC based device (Symbol 8100, HHP Dolphin 7400 recommended) OR
Pocket PC smart device with built in CDPD / CDMA radio.
64 Mb RAM / 32 Mb ROM
Intel Strong ARM Processor

Accessories:

Vehicle mount intelligent cradle + charger
Airlink PinPoint 9610 CDPD / GPS modem
Airlink PinPoint CDMA / GPS modem
Thermal IR Printer (O'Neil or Extech mobile thermal printer)

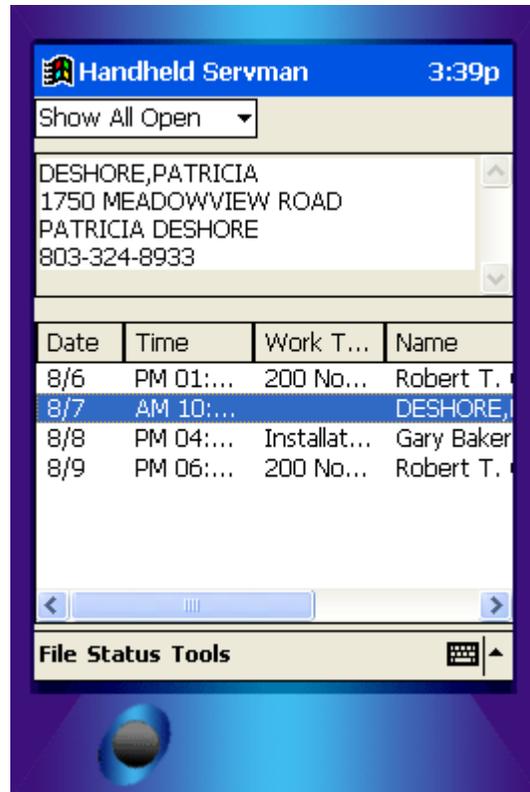
This is the ServMan recommended hardware specifications. Different devices with different configurations can be substituted. Airlink modem is used for wireless configuration. Any external modem or LAN can be used for non-wireless / batch synchronization configuration. O'Neil printer is used for receipt / mobile printing at customer site.

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3. Orders List

Brief Description

All orders can be viewed in a list view displaying the order date, order time, work type and company name. The application will store a pre-configured amount of work orders (configured at ServMan Synchronization Server) on the device which will be processed during synchronization (see [Synchronization](#)). A user can enter any of the work orders to detail the order from the open order list view.



3.1. View Drop Down

Toggle between Order List views by changing the status drop down. Order List can display orders from one of the following:

Show All Open	Displays all open orders and scheduled quotes stored on device sorted by date scheduled.
Show All Closed	Displays all orders and quotes switched to a status of Complete stored on device sorted by date scheduled.
Open by Date	Displays all open orders and scheduled quotes on a specific date sorted by time scheduled.
Closed by Date	Displays all Completed orders and quotes on a specific date sorted by time scheduled.
Show Quotes	Displays all employee's quotes not closed in ServMan. This option will be hidden if employee is not set up in ServMan as able to create quotes.
Unscheduled	Displays all unscheduled orders for employee that are not completed.

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3.2. Sorting Columns

Click on the column header of the order list view to sort the orders by the column title. The sorting method is by descending order.

3.3. Preview Pane

Highlight an order in the list view to display detailed information about the order. The information displayed is a user configured information field (See User Configurations), but the default information is a combination of the ServMan request and customer info fields.

3.4. Change Status on Order from Order List

Highlight an order in the list view to display detailed information about the order in the preview pane.

To change the order status of the order, tap the Status menu item to display the list of status codes available. The list of available status codes will be displayed, with the current status of the order checked. Click on the new status in the menu to change the status.

3.5. Print Order from Order List

Highlight an order in the list view to display detailed information about the order in the preview pane.

To print the order, tap the Tools / Print Order menu. To print the order, align the device with the printer and click OK on the print warning dialog. To cancel the print job, click Cancel on the print warning dialog.

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4. Detail Orders

Brief Description

Orders displayed in the order list can be entered to add / modify detailed information about the work order. Multiple tabs are available for detailing order header and order detail information, as well as payment information, signature captures, etc.

4.1. Detail Existing Order

Double click the order to be detailed on the Order List View to enter and detail the order

4.2. General Tab

The screenshot shows the 'Handheld Servman' application interface. At the top, it displays 'Handheld Servman' and the time '3:21p'. Below this, there are several input fields and dropdown menus for order details:

- Order No: 4710
- Account No: 100
- Job ID: W#4710
- WkTyp: 302 - No Heat Upstairs
- Dept: SERVICE
- Cust. PO: (empty)
- Unsched: (unchecked)
- Date: 7 /12/02
- Time: 12:30:00 PM

 Below the input fields are several tabs: 'Gen Info', 'Request', 'Notes', 'History', and 'Directions'. At the bottom, there are more tabs: 'Gen', 'Client', 'Labor', 'Parts', 'Systems', and 'Task'. A 'File Status Tools Help' bar is visible at the very bottom of the application window.

- Order Number: Read Only. User can not change order number on orders synchronized with ServMan.
- Account Number: Read Only. User can not change order number on orders synchronized with ServMan.
- Job ID: Job ID for order.
- Wk Type: Work type for order. Can be selected from list of work types.
- Dept: Department for order. Can be selected from list of Departments.
- Cust. PO: Customer PO for order.
- Unsched: Can be checked to mark order as "Unscheduled" in ServMan or unchecked to schedule order for employee using handheld.
- Date: Schedule date for order. Can be modified to reschedule order.

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Time: Time scheduled on schedule date for order. Can be modified to reschedule order.

Request: User configurable information field from ServMan Synchronization Application. Information can be added or deleted in edit control.

4.2.1. Gen Info

Click on Gen Info to display General Information for order. Is user configurable. Defaults to address information.

4.2.2. Request

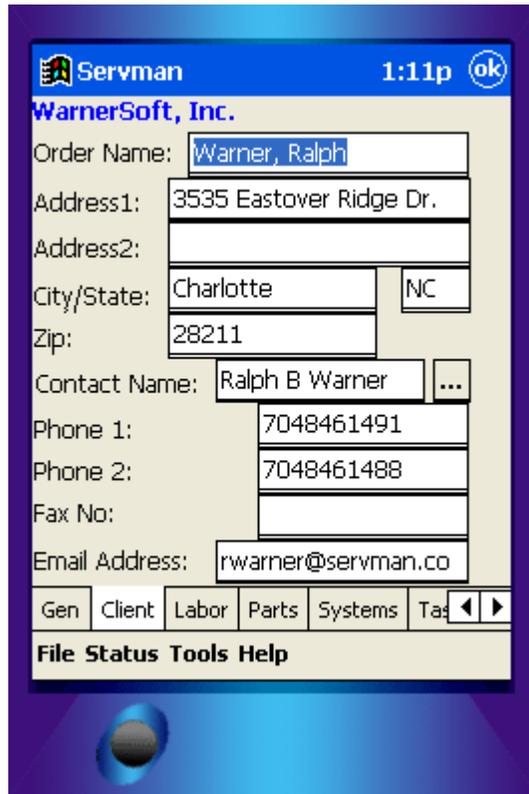
Click on Request to display Request / Comments for order. Can be modified by user.

4.2.3. Notes

Click on Add Notes button to display the Notes dialog. Free form or handwritten notes can be attached to an order viewed in ServMan within the order after being synced.

4.3. Client Tab

Client and contact information can be viewed and modified on the order if necessary.



Client Name: Client Name on the order.

Address 1: Location Address on the order.

Address 2: Location Address on the order.

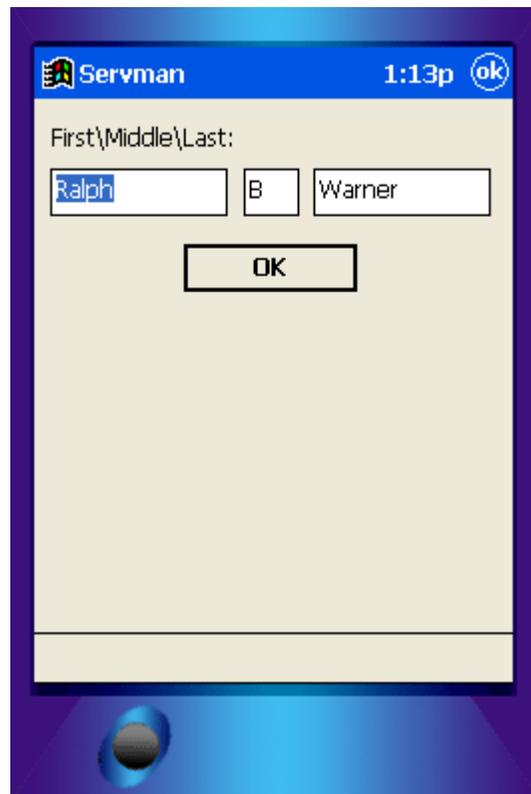
City: City location on the order.

State: State on the order.

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- Zip: Zip code on the order.
- Contact Name: Contact name of primary contact on the account. Can be added / modified by opening First / Middle / Last name dialog (See Below).
- Office Phone No: Office phone number of primary contact on the account.
- Mobile Phone No: Mobile phone number of primary contact on the account.
- Fax No: Fax number of primary contact on the account.
- Email Address: Email address of primary contact on the account.

Add or modify the primary contact name for the client in the First / Middle / Last name dialog:



4.4. Labor Tab

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4.4.1. Add Labor Item

Click the Add Item button to display the Labor Item Detail dialog.

Item Number: Enter item number of item to be added or [click the ... button](#) to display the labor item list to select the item to be added. (REQUIRED)

** If the device being used is a Symbol PDT 8100 or Dolphin 7400 equipped with a scanner, or a PP-55 printer with scanner, the item number can be scanned from a bar code, which will populate item details as detailed below.

Desc.: Automatically populated if item number was found in labor item database. If the item number is not found, an item description should be added. Click the ... button next to the description to expand the item description view to allow for additional data into the item description field.

Billable Time: Automatically populated if Time In and Time Out fields are detailed. Otherwise, a billable time should be entered. Billable time can be different than Total Time.

Date: Date the labor was performed. Defaults to the current date. If multiple days of labor are required for an order, a separate Labor Item should be detailed for each day.

Time In: Time work for work order was started.

Time Out: Time work for work order was completed. Should be based on the total time spent at location.

Total Time: Automatically calculated if Time In and Time Out fields are detailed. Can be modified.

Billable Rate: Automatically populated if item number was found in labor item database. Can be modified.

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Press OK button to add the labor item to the work order or cancel to exit the Labor Item Detail without saving the Labor Item.

4.4.2. Modify Labor Item

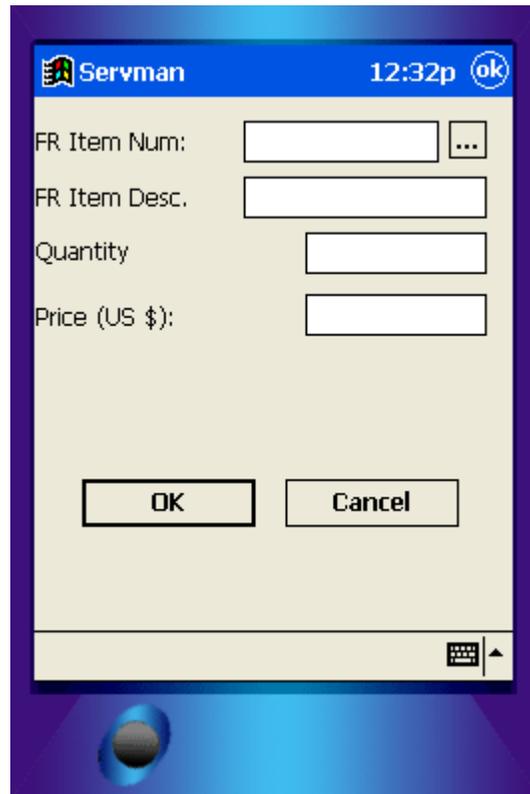
Double click a labor item in the labor item list to modify the item. All fields within the Labor Item Detail Dialog can be modified and saved. See [Add Labor Item](#) for details of fields.

4.4.3. Delete Labor Item

Highlight an item in the labor item list and click the Delete Item button to delete the labor item from the order.

4.4.4. Add Flat Rate Item

Click the Add FR Item button to display the Flat Rate Item Detail dialog.



FR Item Num: Enter item number of item to be added or [click the ... button](#) to display the flat rate item list to select the item to be added. (REQUIRED)

** If the device being used is a Symbol PDT 8100 or Dolphin 7400 equipped with a scanner, the item number can be scanned from a bar code, which will populate item details as detailed below.

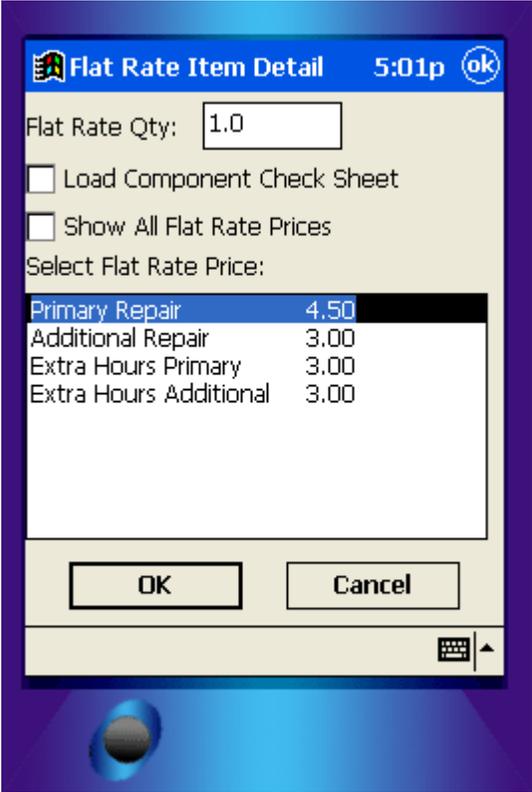
FR Item Desc.: Automatically populated if item number was found in the flat rate item database. If the item number is not found, an item description should be added.

Quantity: A quantity of flat rate items used for order should be entered.

Price: Automatically populated if item number was found in flat rate database. If the item number is not found or is a non-stock item, a price for the item should be entered.

When Item number is entered, the Flat Rate Item Detail screen will be displayed:

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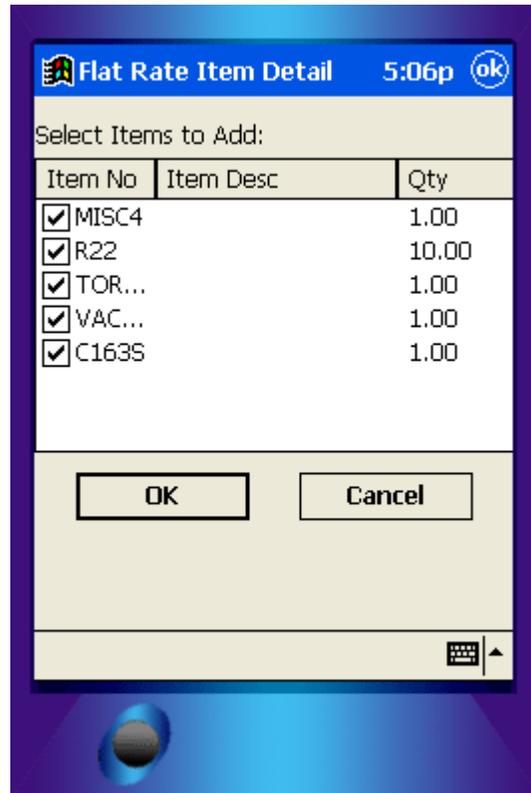


Select the appropriate flat rate price in the flat rate price list. Check the “Show Flat Rate Prices” to display additional flat rate prices in the flat rate price list.

Press OK button to add the flat rate item to the work order or cancel to exit the Flat Rate Item Detail without saving the Flat Rate Item.

If Load Component Sheet is checked, the component list will be displayed:

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Uncheck any items you wish to exclude from the flat rate item. Click “Ok” to add the flat rate item and the checked parts and labor to the order. Click “Cancel” to cancel the addition of the flat rate item.

4.4.5. Modify Flat Rate Item

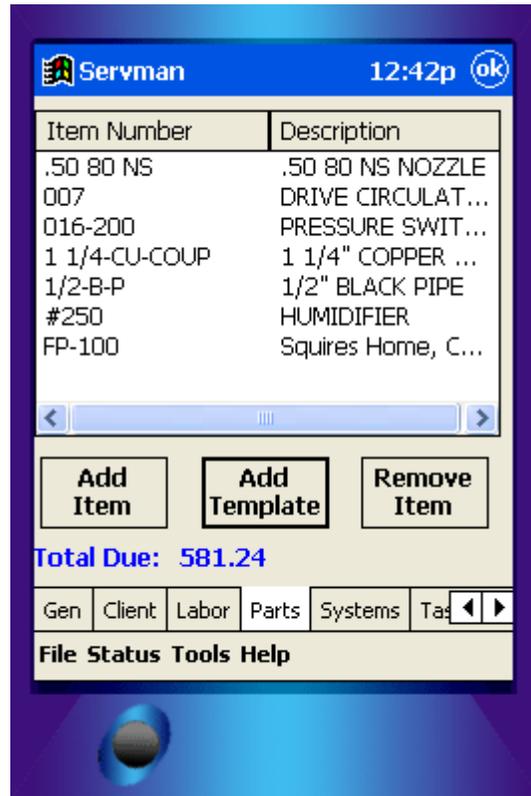
Double click a flat rate item in the labor item list to modify the item. All fields within the Flat Rate Item Detail Dialog can be modified and saved. If the flat rate item is modified, the labor items and material items that are added to the order **ARE NOT** modified accordingly. These items should be modified separately, if necessary.

4.4.6. Delete Flat Rate Item

Highlight an item in the labor item list and click the Delete Item button to delete the labor item from the order. If a flat rate item is deleted, the labor items and material items that are added to the order with the flat rate item **ARE NOT** deleted. These items should be deleted separately, if necessary.

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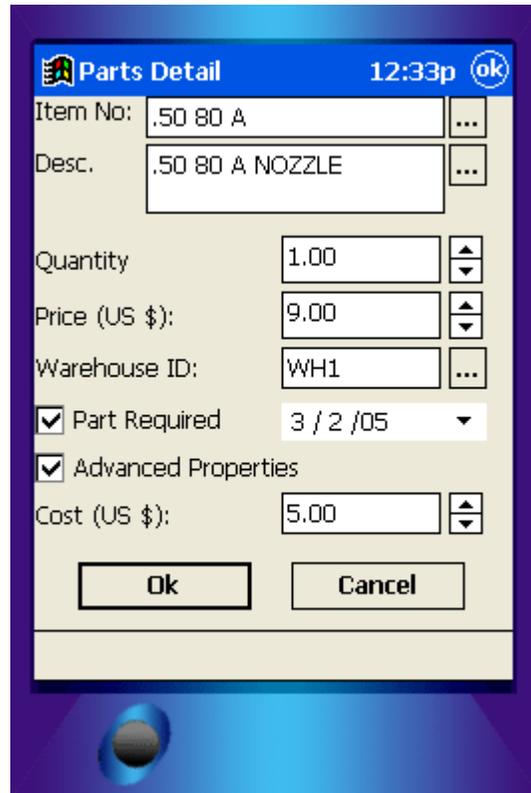
4.5. Parts Tab



4.5.1. Add Part

Click the Add Item button to display the Parts Detail dialog.

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Item Number: Enter item number of item to be added or [click the ... button](#) to display the parts list to select the item to be added. (REQUIRED)

** If the device being used is a Symbol PDT 8100 or Dolphin 7400 equipped with a scanner, or a PP-55 printer with scanner, the item number can be scanned from a bar code, which will populate item details as detailed below.

Desc.: Automatically populated if item number was found in parts database. If the item number is not found, an item description should be added. Click the ... button next to the description to expand the item description view to allow for additional data into the item description field.

Quantity: A quantity of parts used for order should be entered.

Price: Automatically populated if item number was found in parts database. If the item number is not found or is a non-stock item, a price for the item should be entered.

Part Required: Allows user to mark an item as required for the order, which is then synchronized to ServMan with a date required. When synchronized, these line items appear in ServMan on the order in a different color to notify the ServMan User.

Cost: Automatically populated if item number was found in parts database. Can be modified.

Press OK button to add the part to the work order or cancel to exit the Parts Detail without saving the Part on the order.

4.5.2. Modify Part

Double click a part in the part list to modify the item. All fields within the Part Detail Dialog can be modified and saved. See [Add Part](#) for details of fields.

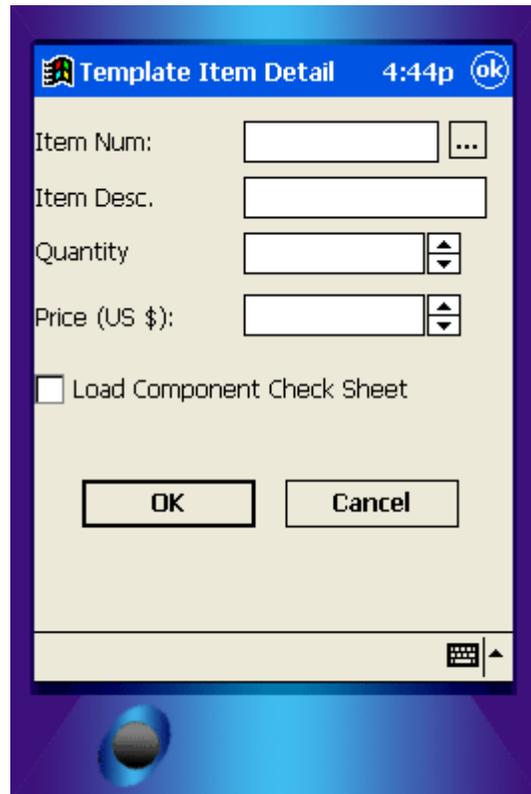
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4.5.3. Delete Part

Highlight an item in the part list and click the Delete Item button to delete the part from the order.

4.5.4. Add Template Item

Click the Add Template Item button to display the Template Item Detail dialog.



- Item Num: Enter item number of item to be added or [click the ... button](#) to display the template item list to select the item to be added. (REQUIRED)
- ** If the device being used is a Symbol PDT 8100 or Dolphin 7400 equipped with a scanner, the item number can be scanned from a bar code, which will populate item details as detailed below.
- Item Desc.: Automatically populated if item number was found in template item database. If the item number is not found, an item description should be added.
- Quantity: A quantity of template items should be entered. Defaulted to 1.
- Price: Automatically populated if item number was found in template item database. If the item number is not found or is a non-stock item, a price for the item should be entered.
- Load Component Check Sheet: Check to list components included in template item or to exclude a specific item from the template item.
- Press OK button to add the template item to the work order or cancel to exit the Template Item Detail without saving the Template Item.
- If Load Component Sheet is checked, the component list will be displayed:

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Uncheck any items you wish to exclude from the template item. Click “Ok” to add the template item and the checked parts and labor to the order. Click “Cancel” to cancel the addition of the template item.

*Optional feature allows template component quantities and warehouse ID to be modified from Component Check List screen. Tap and hold on the item you would like to modify, and select the “Modify Component” popup menu. The Component Modify screen will appear. Make changes and hit OK or Cancel.

4.5.5. Modify Template Item

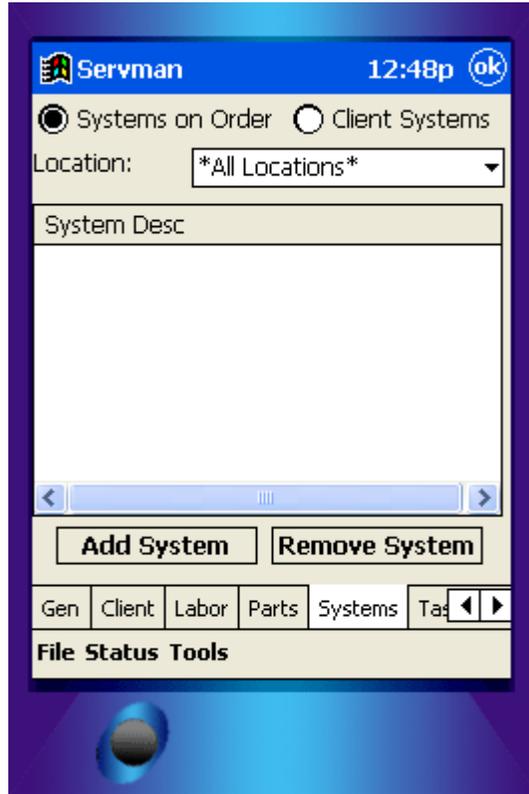
Double click a template item in the material item list to modify the item. All fields within the Template Item Detail Dialog can be modified and saved. If the template item is modified, the labor items and material items that are added to the order **ARE NOT** modified accordingly. These items should be modified separately, if necessary.

4.5.6. Delete Template Item

Highlight an item in the material item list and click the Delete Item button to delete the template item from the order. If a template item is deleted, the labor items and material items that are added to the order with the flat rate item **ARE NOT** deleted. These items should be deleted separately, if necessary.

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4.6. Systems Tab

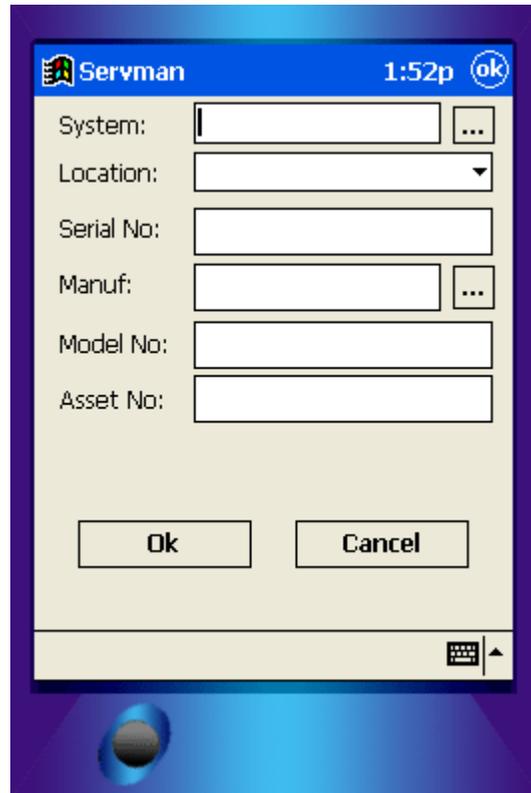


All client systems or only those systems on the order may be viewed on the Systems tab. Systems can also be viewed by location by selecting the appropriate location on the Location drop down.

4.6.1. Add System

Click the Add System button to display the System Detail dialog.

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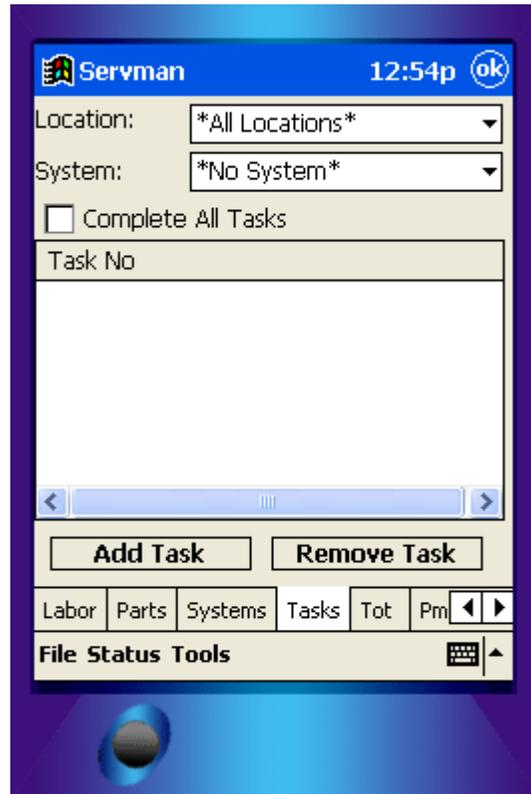
- System:** Enter the system (equipment) description to be added or [click the ... button](#) to display the list of existing systems and select the system to be added. (REQUIRED)
- ** If the device being used is a Symbol PDT 8100 or Dolphin 7400 equipped with a scanner, the system number can be scanned from a bar code, which will populate item details as detailed below.
- Location.** Enter a location for the installed equipment by either selecting an existing account location from the drop down list or by typing a new location in the edit box.
- Serial No:** Enter the serial number on the equipment.
- Manuf:** Enter the manufacturer description or click ... button to display the list of existing manufacturers and select the manufacturer of the equipment.
- Model No:** Enter a model number of the piece of equipment.
- Asset No:** Enter an asset number for the piece of equipment.
- Press OK button to add the system to the work order or cancel to exit the System Detail without saving the system on the order. If OK is pressed, the system will be displayed on the tasks tab in the Systems drop down list.

4.6.2. Delete System

Highlight the system in the system drop down list and click the Remove System button.

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4.7. Tasks Tab

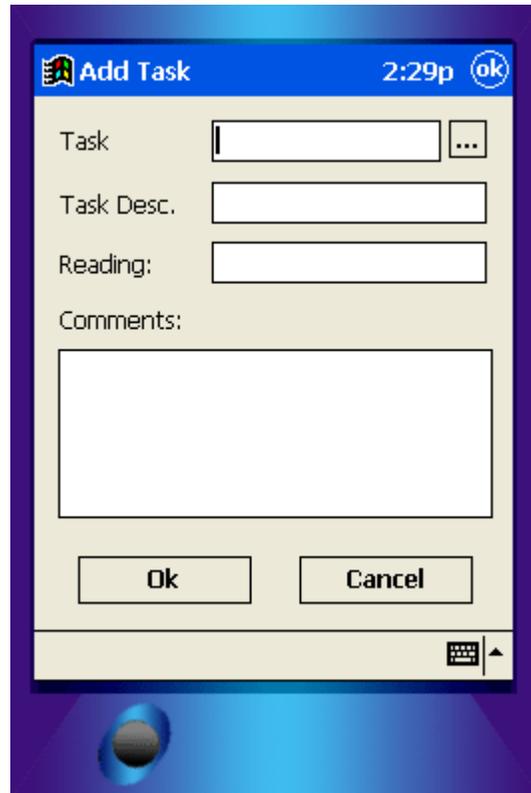


4.7.1. Add Task

Select the system or piece of equipment the task should be attached to by selecting the location of the system in the location drop down and selecting the system in the System drop down. The system drop down contains all systems in the specific location selected. *All Locations* can be selected to display all the systems at a client site.

If the task is a general task for the order with no system associated to it, select the “No System” system in the drop down. Click the Add Task button to display the Task Detail dialog.

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Task Desc: Enter the task description to be added or [click the ... button](#) to display the list of existing task and select the task to be added. (REQUIRED)

** If the device being used is a Symbol PDT 8100 or Dolphin 7400 equipped with a scanner, the task number can be scanned from a bar code, which will populate item details as detailed below.

Reading: Enter a reading or calibration string if needed for the task.

Comments: Enter a comment about the task to be performed.

Press OK button to add the task to the work order or cancel to exit the Task Detail without saving the task on the order.

4.7.2. Modify Task

Double click a task in the task list to modify the task information. All fields within the Task Detail Dialog can be modified and saved. See [Add Task](#) for details of fields.

4.7.3. Delete Task

Highlight the task in the Task List and click the Remove Task button. Click the Ok button in the delete dialog to delete the highlighted item. Click cancel to leave the task on the order.

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4.8. Totals Tab

The totals tab displays the totals of the labor items, material items (parts), total tax, and the total due on the order. The tax codes can be altered on this tab, as well as a signature captured, and the order printed.

Price Book: Price Book Override. Can be selected from list of Price Book entries, or left blank for no override.

4.8.1. Enter / Modify Tax Codes

Click the Enter / Modify Tax Codes button to display the Taxes dialog. If a tax status and tax codes were previously selected for the order, they are highlighted.

To select a tax status for the order, select the tax status code from the tax status drop down.

To select a tax code from the list, highlight the tax code in the list. Up to 4 tax codes can be selected. (The CTRL key may need to be depressed to select multiple tax codes).

To deselect a tax code from the list, click the highlighted tax code in the list. The item should change to un-highlighted.

To save to the tax codes to the order, click Ok. To cancel the tax code modification, click Cancel.

4.8.2. Capture Signature

Click the Signature button to display the Signature dialog.

Write the signature in the Signature dialog as one would with a pen and paper.

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To save to the signature to the order, click Save. To clear the signature capture and start over, click Clear. To cancel the signature capture, click the OK button at the top of the dialog.

4.8.3. Print Order

Click the Print Order button to print the open order.

To print the order to an IR printer, align the device with the printer and click OK on the print warning dialog. To cancel the print job, click Cancel on the print warning dialog.

4.9. Payment Tab

The payment tab allows for payment information to be captured via cash, check, or credit card.

4.9.1. Enter Payment Information

- Paid Amount:** Enter the amount being paid by the customer.
- Payment Method.:** Click the radio button of the payment method: cash, check, or credit card.
- Check Number:** If payment method is by check, enter the check number.
- Credit Card Number:** If payment method is by credit card, enter the credit card number.
- Press To Swipe Card:** On supported printers, allows the user to swipe a credit card through the magnetic card reader to enter the credit card number. Enabling this function will require additional customizations if a supported printer is not used. Please contact your ServMan representative or ServMan Customer Care for a list of currently supported printers or for information regarding the required customizations.

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Credit Card Type: If payment method is credit card, choose the credit card type from the drop down of credit card types accepted in ServMan.

Exp. Date: If payment method is credit card, enter the expiration date on the credit card.

Name on Card: If payment method is credit card, enter the name on the credit card being used.

4.10. Images Tab

Many mobile devices have an optional camera feature which allows taking and saving digital images. If this feature is present on the a mobile device, digital images can be attached to orders within ServMan Mobile and sent back to ServMan during synchronization.



4.10.1. Add Digital Image

Click the Attach Image button to attach an image to the work order. The Open File Dialog will appear:

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To attach an image to the work order, click on the appropriate image name from within the My Documents directory. A date/time stamp and the order number will be added to the image filename and the image file will be appended to the Image list on the work order. The image file is removed from the My Documents directory on the device and added to the ServMan Mobile Images directory. When synchronized, the image file is uploaded to the ServMan Sync Server and removed from the file.

4.10.2. Delete Digital Images

To remove the image from the work order, highlight the filename in the Image List and click Delete Image. The image is deleted from the ServMan Mobile Images directory and is deleted from the device.

4.10.3. View Digital Images

To view a digital image attached to an order, double click the image file name listed on the Image list on the Image tab. The image will be displayed in a pop-up window.

To close the pop-up image viewer, click the X or Ok button at the top of the dialog.

4.11. Order Status

4.11.1. Switch Order Status from within an order

To switch the status of an order while detailing an order, click on the Status menu item. The list of available status codes will be displayed, with the current status of the order checked. Click on the new status in the menu to change the status.

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4.11.2. Switch Order Status from Order List

To switch the status of an order from the order list, highlight the order on which the status is to be changed. Click on the Status menu item. The list of available status codes will be displayed, with the current status of the order checked. Click on the new status in the menu to change the status.

4.12. Menu Options

4.12.1. View Service History

Click on Tools->View Service History button to display the Account History dialog. The account history dialog details the last five service calls to the customer on the order.

4.12.2. View Driving Directions (If Microsoft MapPoint is installed on ServMan sync server)

Click on the Tools->View Driving Directions button to view the driving directions from the last order or appointment to the order being viewed. The directions can be printed to the receipt printer by pressing the print button on the Directions screen.

4.12.3. Get Real Time Directions (If Microsoft MapPoint is installed on ServMan sync server and using GPS)

Click on the Tools->Get Real Time Driving Directions button to view query for driving directions to the order from the last reported GPS location of the employee. The directions can be printed to the receipt printer by pressing the print button on the Directions screen.

4.12.4. Print Order

Click on the Tools->Print Order to print the order as detailed above in section 4.8.3.

4.13. Save Order

To accept and save the new order, click on the “Ok” button in the system menu of any of the order tabs. The New Order Detail dialog will close, displaying the Open Order List view. The order that was saved will appear on the Open Order List view on the appropriate scheduled date.

5. New Orders

Brief Description

A new order can be created and detailed on the mobile device.

5.1. Create New Order

Select the File / New Order menu item to create a new order on the device. Detail the order as explained above in [Detail Orders](#) with the following exceptions:

5.1.1. General Tab Exceptions

Order Number: User can enter an order number dispatched from a ServMan dispatcher who creates the order in ServMan or can leave field blank. If the field is left blank, the order number will be

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automatically generated and placed in a hold status when the item is synchronized back to ServMan for future attention.

Account Number: User can enter an account number dispatched from a ServMan dispatcher who creates the order in ServMan or can leave field blank. If the field is left blank, the order will be placed in a hold status when the item is synchronized back to ServMan for future attention.

5.1.2. From Existing Order

From within an existing order, click the File->New Order menu option to create a new order for the client of the existing order. The client information is populated automatically.

5.1.3. From Existing Quote

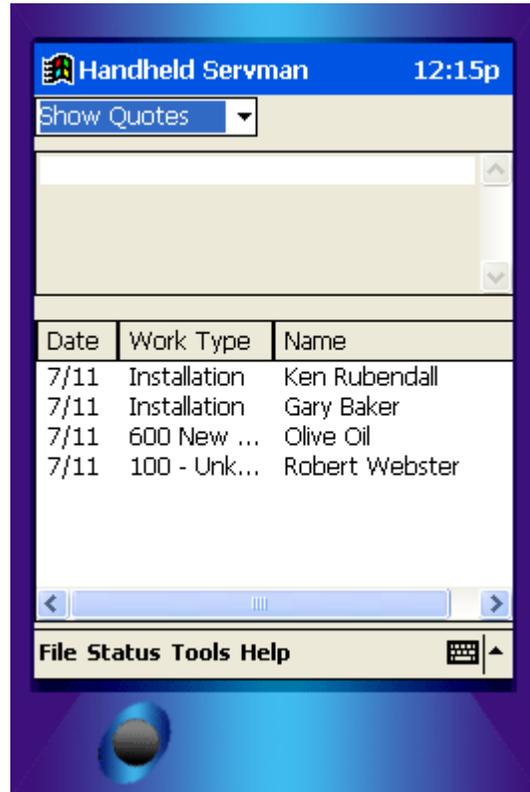
From within an existing quote, click the File->New Order menu option to create a new order for the client of the existing quote. The client information is populated automatically.

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6. Quotes List

Brief Description

All quotes can be viewed in a list view displaying the date, work type, and company name. A user can modify any detail of the quotes by entering the quote from the open order list view.



6.1. Sorting Columns

Click on the column header of the quote list view to sort the quotes by the column title. The default sorting method is by descending order. Click the column header again to reverse the sort of the list view to ascending.

6.2. Preview Pane

Highlight a quote in the list view to display detailed information about the order. The information displayed is a user configured information field (See User Configurations), but the default information is a combination of the ServMan request and customer info fields.

6.3. Print Quote from Quote List (IR Printing Only)

Highlight a quote in the list view to display detailed information about the order in the preview pane.

To print the quote, tap the Tools / Print Order menu. To print the quote, align the device with the printer and click OK on the print warning dialog. To cancel the print job, click Cancel on the print warning dialog.

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7. Detail Quotes

Brief Description

Quotes displayed in the quote list can be entered to add / modify detailed information about the quote. Multiple tabs are available for detailing quote information.

7.1. Detail Existing Quote

Double click the quote to be detailed on the Quote List View to enter and detail the order

7.2. General Tab

- Order Number: Read Only. User can not change order number on orders synchronized with ServMan.
- Account Number: Read Only. User can not change order number on orders synchronized with ServMan.
- Wk Type: Work type for quote. Can be selected from list of work types.
- Price Book: Price Book Override. Can be selected from list of Price Book entries, or left blank for no override.
- Exp Date: Expiration date for quote.
- Request: User configurable information field from ServMan Synchronization Application. Information can be added or deleted in edit control.

7.2.1. Cancel Modification

Click on the File->Cancel menu to cancel the modification of the current quote without the quote being saved.

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7.3. Client Tab

Client and contact information can be viewed and modified on the quote if necessary.

The screenshot shows a mobile application interface for the 'Client Tab'. The title bar displays 'Servman' and the time '12:24p'. The form contains the following fields:

- Client Name: Client Name
- Address1: 123 Popeye Lane
- Address2: (empty)
- City/State: Matthews NC
- Zip: 28105
- Contact Name: Contact
- Phone 1: 704-555-1234
- Phone 2: (empty)
- Fax No: 704-555-1111
- Email Address: test@email.com

Below the form is a summary table:

Gen	Client	Labor	Parts	Tot

At the bottom of the screen, there are buttons for 'File', 'Status', 'Tools', and 'Help'.

- Client Name: Client Name on the order.
- Address 1: Location Address on the order.
- Address 2: Location Address on the order.
- City: City location on the order.
- State: State on the order.
- Zip: Zip code on the order.
- Contact Name: Contact name of primary contact on the account.
- Office Phone No: Office phone number of primary contact on the account.
- Mobile Phone No: Mobile phone number of primary contact on the account.
- Fax No: Fax number of primary contact on the account.
- Email Address: Email address of primary contact on the account.

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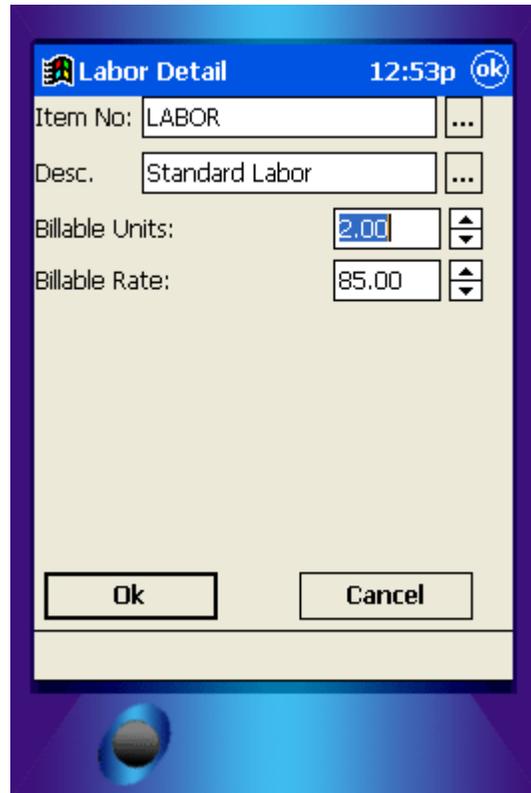
7.4. Labor Tab



7.4.1. Add Labor Item

Click the Add Item button to display the Labor Item Detail dialog.

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Item Number: Enter item number of item to be added or [click the ... button](#) to display the labor item list to select the item to be added. (REQUIRED)

** If the device being used is a Symbol PDT 8100 or Dolphin 7400 equipped with a scanner, or a PP-55 printer with scanner, the item number can be scanned from a bar code, which will populate item details as detailed below.

Desc.: Automatically populated if item number was found in labor item database. If the item number is not found, an item description should be added. Click the ... button next to the description to expand the item description view to allow for additional data into the item description field.

Billable Time: Automatically populated if Time In and Time Out fields are detailed. Otherwise, a billable time should be entered. Billable time can be different than Total Time.

Billable Rate: Automatically populated if item number was found in labor item database. Can be modified.

Press OK button to add the labor item to the work order or cancel to exit the Labor Item Detail without saving the Labor Item.

7.4.2. Modify Labor Item

Double click a labor item in the labor item list to modify the item. All fields within the Labor Item Detail Dialog can be modified and saved. See [Add Labor Item](#) for details of fields.

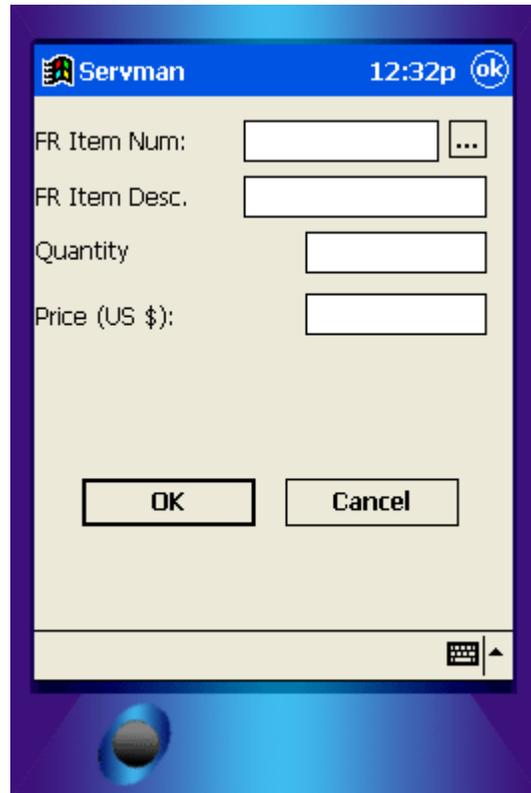
7.4.3. Delete Labor Item

Highlight an item in the labor item list and click the Delete Item button to delete the labor item from the order.

7.4.4. Add Flat Rate Item

Click the Add FR Item button to display the Flat Rate Item Detail dialog.

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FR Item Num: Enter item number of item to be added or [click the ... button](#) to display the flat rate item list to select the item to be added. (REQUIRED)

** If the device being used is a Symbol PDT 8100 or Dolphin 7400 equipped with a scanner, the item number can be scanned from a bar code, which will populate item details as detailed below.

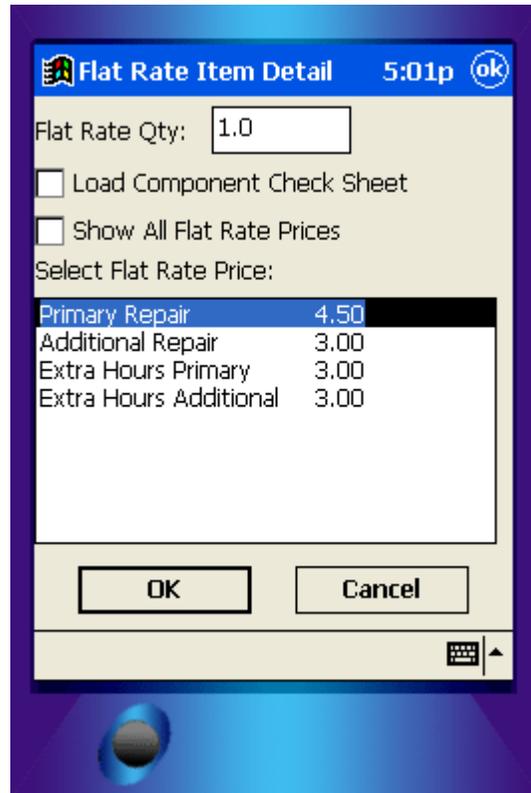
FR Item Desc.: Automatically populated if item number was found in the flat rate item database. If the item number is not found, an item description should be added.

Quantity: A quantity of flat rate items used for order should be entered.

Price: Automatically populated if item number was found in flat rate database. If the item number is not found or is a non-stock item, a price for the item should be entered.

When Item number is entered, the Flat Rate Item Detail screen will be displayed:

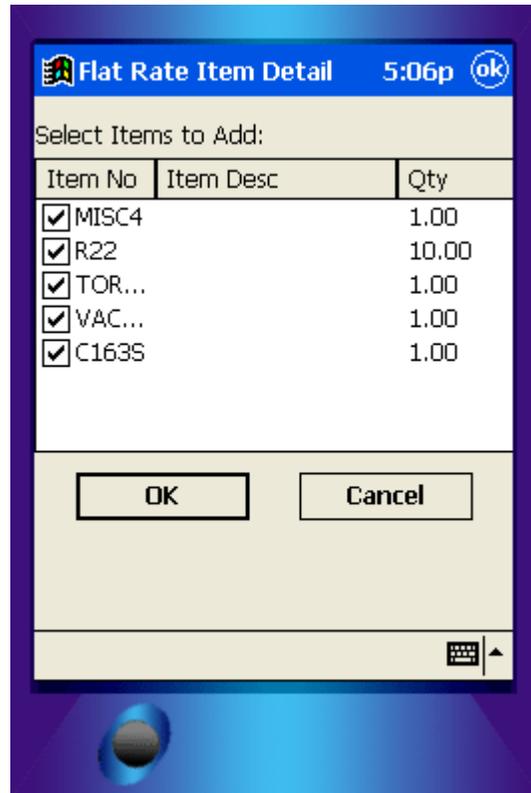
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Select the appropriate flat rate price in the flat rate price list. Check the “Show Flat Rate Prices” to display additional flat rate prices in the flat rate price list.

Press OK button to add the flat rate item to the work order or cancel to exit the Flat Rate Item Detail without saving the Flat Rate Item.

If Load Component Sheet is checked, the component list will be displayed:



Uncheck any items you wish to exclude from the flat rate item. Click “Ok” to add the flat rate item and the checked parts and labor to the order. Click “Cancel” to cancel the addition of the flat rate item.

7.4.5. Modify Flat Rate Item

Double click a flat rate item in the labor item list to modify the item. All fields within the Flat Rate Item Detail Dialog can be modified and saved. If the flat rate item is modified, the labor items and material items that are added to the order **ARE NOT** modified accordingly. These items should be modified separately, if necessary.

7.4.6. Delete Flat Rate Item

Highlight an item in the labor item list and click the Delete Item button to delete the labor item from the order. If a flat rate item is deleted, the labor items and material items that are added to the order with the flat rate item **ARE NOT** deleted. These items should be deleted separately, if necessary.

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7.5. Parts Tab

The screenshot shows a mobile application interface for a 'Parts Detail' dialog. The dialog has a blue header with the title 'Parts Detail', the time '12:56p', and an 'ok' button. Below the header, there are several input fields and checkboxes:

- Item No.:** .50 80 A
- Desc.:** .50 80 A NOZZLE
- Quantity:** 1.00
- Price (US \$):** 9.00
- Warehouse ID:** WH1
- Part Required:** 3 / 2 /05
- Advanced Properties**
- Cost (US \$):** 5.00

At the bottom of the dialog, there are two buttons: 'Ok' and 'Cancel'. The dialog is displayed over a background that appears to be a mobile device screen with a blue and purple gradient and a circular button at the bottom.

7.5.1. Add Part

Click the Add Item button to display the Parts Detail dialog.

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The screenshot shows a 'Parts Detail' dialog box with the following fields and values:

- Item Num: .50 60 A
- Item Desc.: 50 60 A NOZZLE
- Quantity: 1.00
- Price (US \$): 6.60
- Warehouse ID: WH1
- Part Required: 5/19/04
- Advanced Properties:
- Cost (US \$): 4.40

Buttons: Ok, Cancel

Item Number: Enter item number of item to be added or [click the ... button](#) to display the parts list to select the item to be added. (REQUIRED)

** If the device being used is a Symbol PDT 8100 or Dolphin 7400 equipped with a scanner, or a PP-55 printer with scanner, the item number can be scanned from a bar code, which will populate item details as detailed below.

Desc.: Automatically populated if item number was found in parts database. If the item number is not found, an item description should be added. Click the ... button next to the description to expand the item description view to allow for additional data into the item description field.

Quantity: A quantity of parts used for order should be entered.

Price: Automatically populated if item number was found in parts database. If the item number is not found or is a non-stock item, a price for the item should be entered.

Part Required: Allows user to mark an item as required for the order, which is then synchronized to ServMan with a date required. When synchronized, these line items appear in ServMan on the order in a different color to notify the ServMan User.

Cost: Automatically populated if item number was found in parts database. Can be modified.

Press OK button to add the part to the work order or cancel to exit the Parts Detail without saving the Part on the order.

7.5.2. Modify Part

Double click a part in the part list to modify the item. All fields within the Part Detail Dialog can be modified and saved. See [Add Part](#) for details of fields.

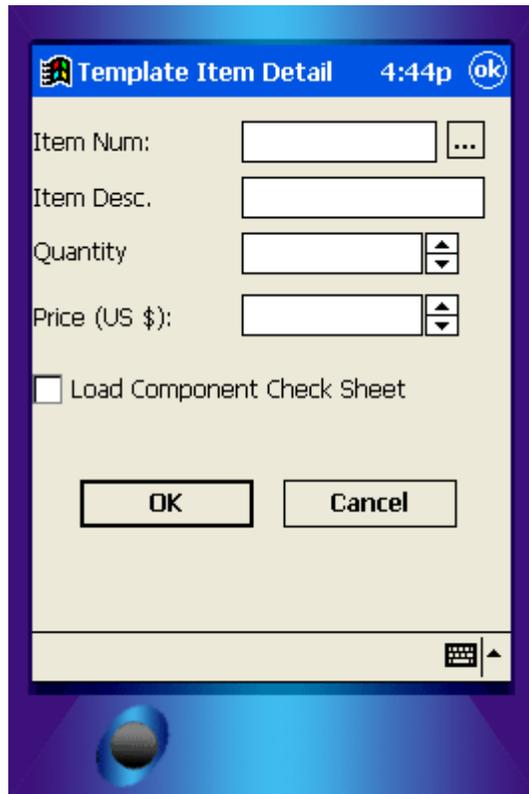
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7.5.3. Delete Part

Highlight an item in the part list and click the Delete Item button to delete the part from the order.

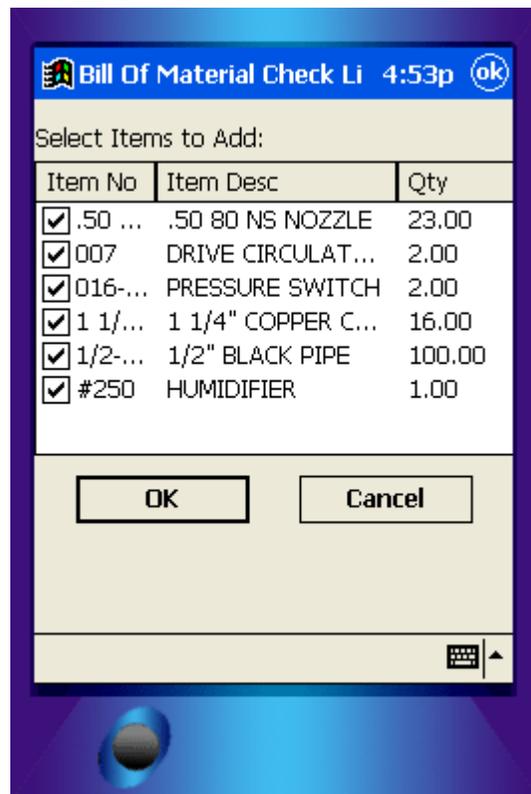
7.5.4. Add Template Item

Click the Add Template Item button to display the Template Item Detail dialog.



- Item Num: Enter item number of item to be added or [click the ... button](#) to display the template item list to select the item to be added. (REQUIRED)
- ** If the device being used is a Symbol PDT 8100 or Dolphin 7400 equipped with a scanner, the item number can be scanned from a bar code, which will populate item details as detailed below.
- Item Desc.: Automatically populated if item number was found in template item database. If the item number is not found, an item description should be added.
- Quantity: A quantity of template items should be entered. Defaulted to 1.
- Price: Automatically populated if item number was found in template item database. If the item number is not found or is a non-stock item, a price for the item should be entered.
- Load Component Check Sheet: Check to list components included in template item or to exclude a specific item from the template item.
- Press OK button to add the template item to the work order or cancel to exit the Template Item Detail without saving the Template Item.
- If Load Component Sheet is checked, the component list will be displayed:

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Uncheck any items you wish to exclude from the template item. Click “Ok” to add the template item and the checked parts and labor to the order. Click “Cancel” to cancel the addition of the template item.

7.5.5. Modify Template Item

Double click a template item in the material item list to modify the item. All fields within the Template Item Detail Dialog can be modified and saved. If the template item is modified, the labor items and material items that are added to the order **ARE NOT** modified accordingly. These items should be modified separately, if necessary.

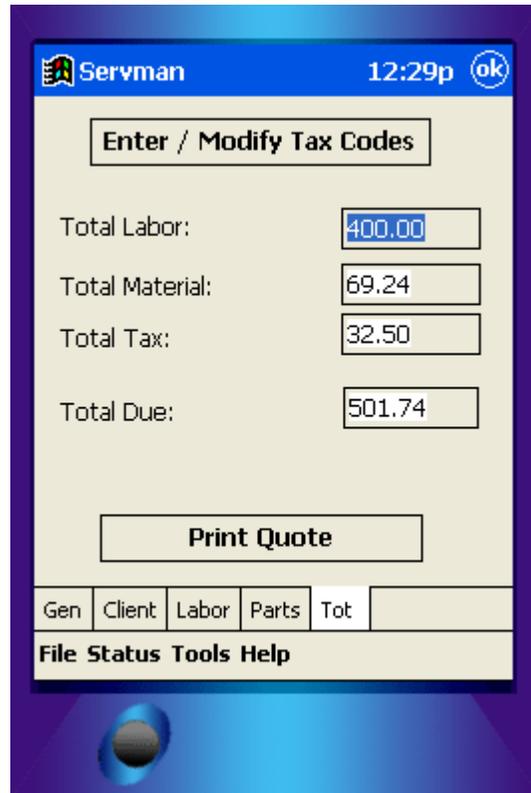
7.5.6. Delete Template Item

Highlight an item in the material item list and click the Delete Item button to delete the template item from the order. If a template item is deleted, the labor items and material items that are added to the order with the flat rate item **ARE NOT** deleted. These items should be deleted separately, if necessary.

7.6. Totals Tab

The totals tab displays the totals of the labor items, material items (parts), total tax, and the total due on the quote. The tax codes can be altered on this tab, and the quote can be printed from this tab.

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7.6.1. Enter / Modify Tax Codes

Click the Enter / Modify Tax Codes button to display the Taxes dialog. If any tax codes were previously selected for the order, they are highlighted.

To select a tax code from the list, highlight the tax code in the list. Up to 5 tax codes can be selected. (The CTRL key may need to be depressed to select multiple tax codes).

To deselect a tax code from the list, click the highlighted tax code in the list. The item should change to un-highlighted.

To save to the tax codes to the order, click Ok. To cancel the tax code modification, click Cancel.

7.6.2. Print Quote

Click the Print Quote button to print the open order.

To print the quote to an IR printer, align the device with the printer and click OK on the print warning dialog. To cancel the print job, click Cancel on the print warning dialog.

7.7. Save Quote

To accept and save the quote, click on the "Ok" button in the system menu of any of the order tabs. The Quote dialog will close, displaying the Open Quote List view. The quote that was saved will appear on the Open Quote List view on the appropriate entered date.

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8. New Quotes

Brief Description

A new quote can be created and detailed on the mobile device.

8.1. Create New Quote

Select the File / New Quote menu item to create a new order on the device. Detail the quote as explained above in [Detail Quotes](#) with the following exceptions:

8.1.1. General Tab Exceptions

- Quote Number: User can enter a quote number dispatched from a ServMan dispatcher who creates the quote in ServMan or can leave field blank. If the field is left blank, the quote number will be automatically generated.
- Account Number: User can enter an account number dispatched from a ServMan dispatcher who creates the order in ServMan or can leave field blank.

8.1.2. From Existing Order

From within an existing order, click the File->New Quote menu option to create a new quote for the client of the existing order. The client information is populated automatically.

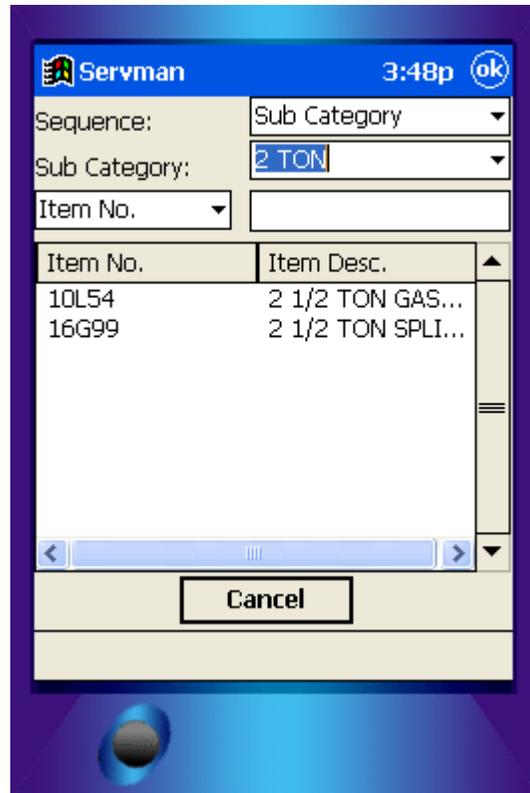
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9. Item Look-up Dialog

Brief Description

A look up dialog is available to find items, systems, tasks, etc. when adding items to an order. This dialog allows for a search of an item using the item ID or description.

9.1. Item Search



9.1.1. Find an Item

The item list can be filtered by category or sub category prior to searching and selecting an item. To filter the item list, first select the sequence to filter by (Primary Category or Sub Category), and then choose the specific value to filter on.

Select the search criteria to find an item with by selecting the search method in the search method drop down.

Enter a string to search for in the search string edit box. When letters are entered into the edit box, the item list will scroll to the item matching the search criteria.

9.1.2. Scroll to an Item

Tap the arrows on the scroll bar adjacent to the item list up or down to scroll one item at a time. Tap the area within the scroll bar to page up or down to an item. Tap and drag the thumb position bar to scroll up and down by position.

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9.1.3. Select an Item

To select an item from the list, double tap the item you wish to add to the order. This will automatically close the search dialog and populate all necessary information in the appropriate add dialog.

To cancel a search without adding an item, click the cancel button.

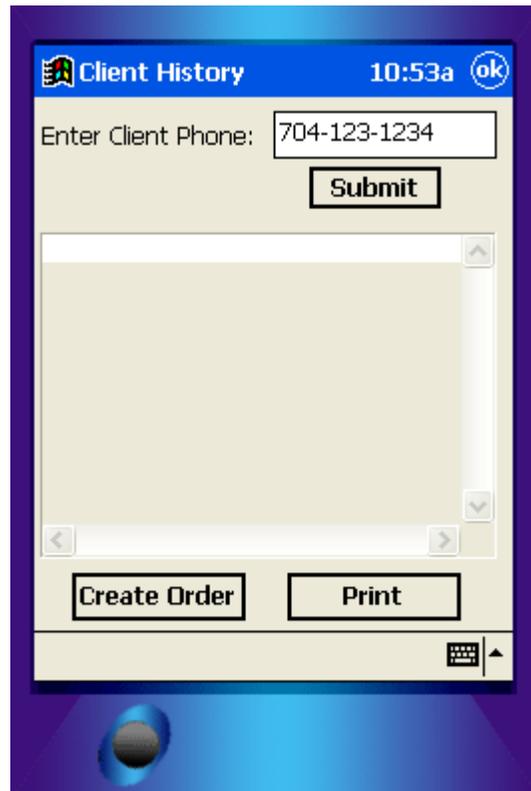
10. Real Time Look-up Options

Brief Description

An account history and driving directions can be retrieved real time through the ServMan Sync Server.

10.1. Account History

An account history can be retrieved from the ServMan sync server to ServMan mobile based on the main account phone number. This is designed to be used on a wireless network for a technician to get account history data for a specific client or any other user defined information specified in ServMan based on the client phone number.



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10.1.1. Receive Account History

Enter the primary contact or client phone number into “Enter Client Phone” edit box.

Click “Submit”.

The client’s account history, if any, will display in the account history edit box.

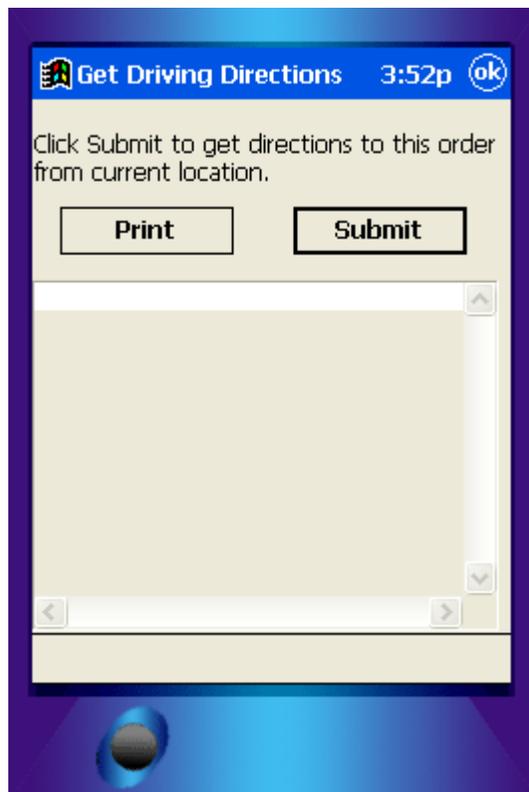
Click “Ok” to exit.

Click “Print” to print the account history to a mobile printer.

Click “Create Order” to create a new order for the client. The order will be populated with the client account number and client information.

10.2. Real Time Driving Directions (if using GPS & Microsoft MapPoint)

Real time driving directions to an order can be downloaded to ServMan mobile based on last known location of truck.



10.2.1. Receive Driving Directions

Enter the order for which driving directions should be found by double clicking the order on the Order List View.

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Click the “Get Driving Directions” item on the Tools menu.

Click “Submit”.

The Microsoft MapPoint driving directions from the last GPS coordinate reported to ServMan to the given order will be downloaded and displayed in the Driving Directions edit box. These directions can be printed by hitting the Print button.

Click “Ok” to exit.

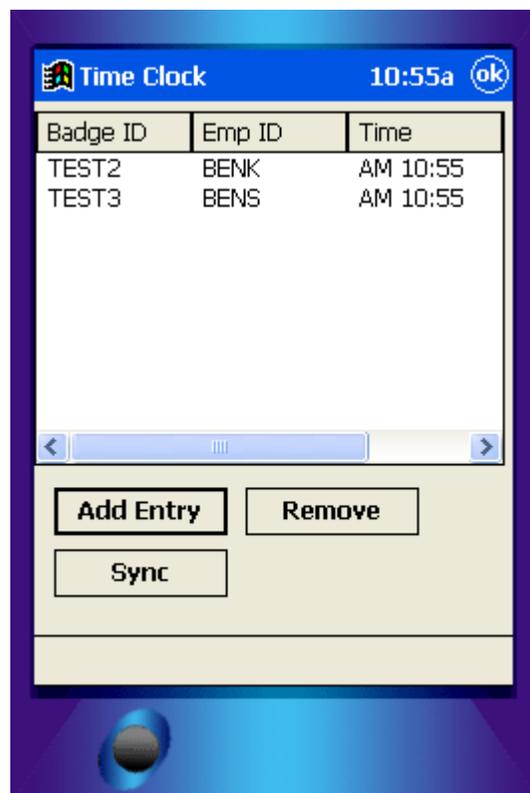
11. Time Clock

Brief Description

Users can add entries for themselves and others (if set up to do so) into the ServMan Time Clock module from ServMan Mobile. Entries into the Time Clock Module from ServMan Mobile are processed automatically based on previous entries. If an employee is previously logged in and a Time Clock Entry is received from ServMan Mobile, the employee will be automatically logged out. Multiple time entries can be saved within ServMan Mobile before being synced and are handled appropriately.

11.1. Time Clock Entries

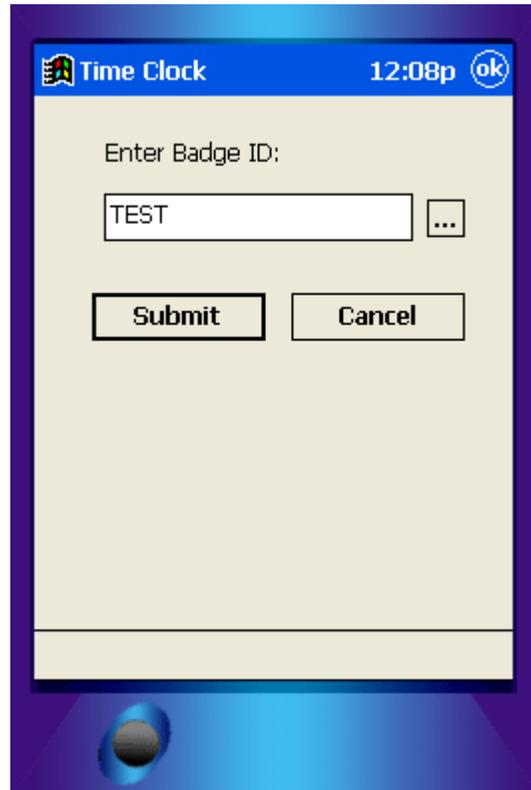
To add entries to the ServMan Time Clock Module by selecting the Tools->Time Clock menu item. The Time Clock Dialog is shown:



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11.1.1. Add Time Clock Entries

Click the Add Entry button to add an entry into the Time Clock Module. If the user is restricted in ServMan to only adding entries for them, the entry will be added to the list. If the user is set up in ServMan to be able to log Time Clock entries for other users, the following dialog is shown:



The employee's Badge ID can be looked up by clicking the ... button. To add the entry, click the Submit button. The entry can be canceled by hitting the Cancel button.

All entries are saved immediately when the entry is displayed on the Time Clock Entry List.

11.1.2. Remove Time Clock Entries

Time Clock entries can be removed from ServMan Mobile before they are synchronized by clicking the Remove button in the Time Clock Entry list.

11.1.3. Synchronize Time Clock Entries

The Time Clock entries displayed in the Time Clock Entry list can be synchronized to the ServMan Time Clock Module by clicking the Sync button. The entries entered in the Time Clock Entry list will be uploaded to the ServMan Synchronization Server and the list will be refreshed with no entries. The ServMan Sync Server imports the entries appropriately base on previous clock-in/clock-outs.

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11.1.4. Exit Time Clock Dialog

Entries into the Time Clock Dialog are saved immediately when added or removed and the Time Clock Entry List is updated. To exit the Time Clock Dialog, click the Ok button in the top right corner. All entries saved in the time clock dialog can be viewed, removed, and additional entries can be added by re-entering the Time Clock Dialog.

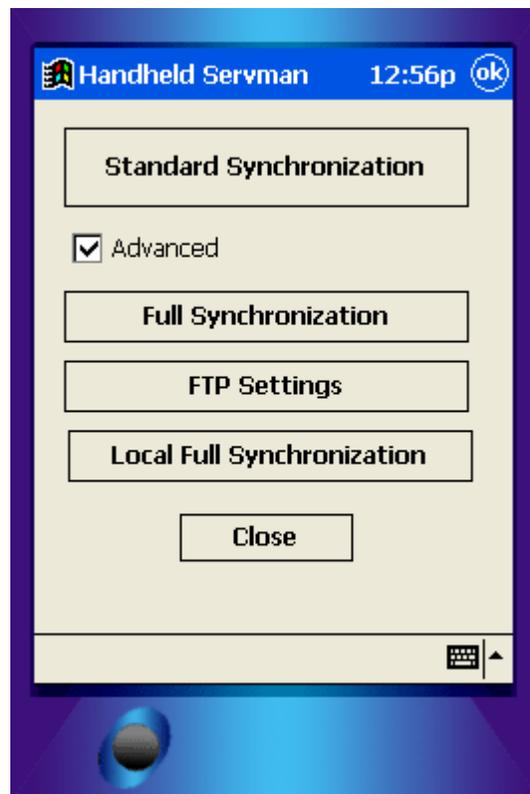
12. Synchronization

Brief Description

Any work orders that were detailed and completed in the mobile application will be uploaded to ServMan host to be stored.

12.1. Synchronization Dialog

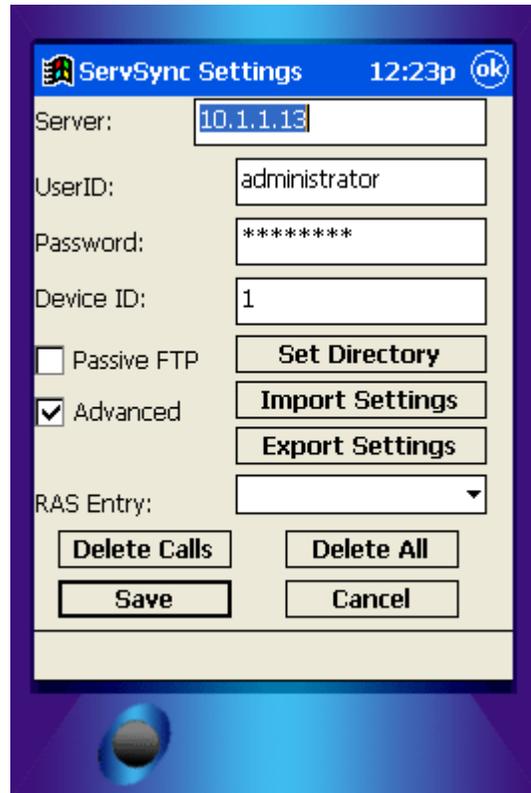
To perform any synchronization actions, enter the Synchronization Dialog by selecting the Tools->Synchronize menu item. Both a full and standard synchronization initializes the internet connection and sends and receives the necessary data automatically.



12.1.1. FTP Settings

*** These settings must be set before synchronization can be performed.**

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- Server Address: The server address of the FTP site being used for synchronizations. This should be set up as detailed in the ServMan Mobile Installation Instructions.
- User ID.: User ID to log on to the FTP server.
- Password: Password for the UserID to log on to the FTP server.
- Device ID: Device ID for the employee synchronizing data. This field maps to the Device ID field in ServMan. This field specifies which device should get the orders for a specific employee ID in ServMan.
- Passive FTP: Keep unchecked unless your ISP requires you to use passive FTP for FTP transactions.
- Set Directory: Displays dialog to set the FTP incoming, outgoing, and images directories.
- Import Settings: Import mission critical ServMan Mobile settings from file. The ServMan Mobile settings for FTP access and print settings can be exported to a storage card and easily imported to quickly configure ServMan Mobile.
- Export Settings: Export mission critical ServMan Mobile settings to file. The ServMan Mobile settings for FTP access and print settings can be exported to a storage card and easily imported to quickly configure ServMan Mobile.
- Click the Advanced check box if the device will be using an external modem for its internet connection or to delete all the ServMan databases on the device. A remote connection will need to be set up on the mobile device in the Connection Manager on the device. The entry should be set up per the specifications of the modem being used.
- RAS Entry: Enter the named connection from the Connection Manager to connect to the modem. See [Configure External Modem](#) for details on configuring the remote network connection.

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- Delete All: Click this button to delete the ServMan databases on the device. **This will delete all orders, item data, etc on the device.** A full synchronization would need to be performed to retrieve current ServMan data.
- Delete Calls: Click this button to delete the ServMan databases used for storing orders on the device. **This will delete all orders.** A standard synchronization would need to be performed to retrieve current ServMan data.

Click Save to save the FTP settings. Click Cancel to exit the FTP settings dialog without saving any settings.

12.1.2. Full Synchronization

Click the Full Synchronization button on the Synchronization dialog to perform a full synchronization. A full synchronization downloads all critical data needed for operation of ServMan mobile. Included in the full synchronization is item lists, task lists, system lists, work types, etc. This synchronization downloads much more data than a standard synchronization, so it is not recommended that a full synchronization is performed very often. A full synchronization should only be performed when initializing a device or when a refresh of ServMan data is needed.

If a full synchronization file has been generated and posted to the sync server ftp site via a ServMan Procedure, the fullsynczip.xml (a compressed file) file is downloaded and used for the full synchronization.

If there is no fullsynczip.xml file available for download from the sync server, the ServMan sync server will assimilate the appropriate full sync information to be downloaded to the device. This method may take server minutes to complete.

12.1.3. Standard Synchronization

Click the Standard Synchronization button on the Synchronization dialog to perform a standard synchronization.

A standard synchronization uploads any work orders that were modified on the device and downloads any new orders for the employee.

12.1.4. Status Synchronization

Click the Status Sync option on the status menu to perform a status synchronization with the ServMan Sync Server. This type of synchronization **ONLY SENDS** an order status update to ServMan and does not wait for a response from the ServMan Sync Server. This feature is designed for use on wireless networks so users of ServMan in the office know the real time status of work orders.

12.1.5. Local Full Synchronization

Click the Local Full Synchronization button on the Synchronization dialog to perform a full synchronization from a file resident on the device. The file name of the local full synchronization file should be FULLSYNC.xml and should be placed in the My Documents folder of the device before performing the Local Full Synchronization.

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13. Update ServMan Mobile

Brief Description

ServMan Mobile can be updated remotely to a new version.

13.1. Mobile Update

To perform a Mobile Update, click the Update ServMan menu item on the Tools menu and follow the instructions on the screen. This process will check to make sure an update is available and download the update file, if needed. After downloaded, the update will automatically install and configure ServMan Mobile.

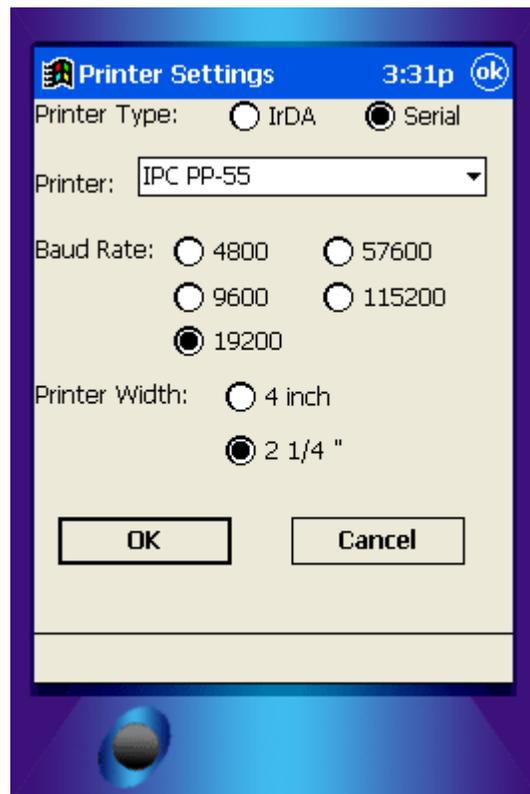
** If update does not automatically start after download, exit ServMan Mobile. Go to Programs->File Explorer on the device and browse to the My Documents directory. Click on the installation file to install new version (InstallFile.arm.cab for PDA's, SymbolInstallFile.arm.cab for Symbol devices).

14. Print Settings

Brief Description

The type of printer and method of communication for printing need to be set up in ServMan Mobile before printing.

14.1. Printer Settings Dialog



Set the Printer Type (IrDa, Serial, Bluetooth), the printer name (if applicable), baud rate for printer, printer width, and parity to the appropriate settings for the printer being used. Press "Ok" to save settings or "Cancel" to exit without saving.

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15. Configure Desktop ServMan for Synchronization

Brief Description

ServMan must be configured properly to allow for the mobile solution to synchronize with the back end. These configuration changes can be made by a ServMan administrator user.

15.1. Configure Employees

The employee file of those employees utilizing the mobile solution needs to be configured. The employee file can be accessed within ServMan as follows:

1. Enter the employee file by clicking the Master Files / Miscellaneous / Employee File menu.
2. Double Click on a particular employee using the mobile solution.
3. Enter the Device ID of the mobile device the employee will be using. The Device ID is simply a sequential number starting with the number 1 that corresponds to the same number entered on the mobile device. **The ID must not be duplicated for multiple employees.**
4. Make sure the Warehouse ID for the employee is set to the desired warehouse (i.e. truck warehouse). This warehouse is the warehouse used by the mobile device for material items detailed on orders. If this warehouse is not specified, the default ServMan warehouse is used.
5. If employee uses quoting, check the the Use Quote check box.

15.2. Configure Items

Detail items must be configured to download to the device as follows:

1. Enter a particular item within ServMan by clicking the Items button within the ServMan menu.
2. Double click the item to configure in the item list.
3. Click on the Page Two tab of the item.
4. Click the "Download to Palmtop" check box which will allow the item to be downloaded to the mobile device for the item list. Leave this field blank if the item should not be used on the handheld.

15.3. Configure Status'

Order Status' must be configured to download to the device as follows. Only orders with order status' configured as detailed below will be sent to the mobile device.

1. Enter the order status file by clicking the Master Files / Miscellaneous / Order Status File menu.
2. Double click on a particular Order Status to be used on the mobile device.
3. Click the "Can be set from field" check box to enable the status to be downloaded to the mobile device as a viable order status for each of the orders on the mobile device. Leave this field blank if the status should not be used on the handheld.

15.4. Configure External Modem Connection for Dolphin 7400

A remote networking connection needs to be established to access an external modem.

1. Enter the Remote Networking setup by clicking Start / Programs / Communications / Remote Networking.
2. Add a new connection by clicking on Add New Connection.

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3. In the properties of the connection, click Configure.
4. On the Port Settings tab, make sure Baud Rate is set to 19200, Data Bits to 8, Parity to None, Stop Bits to 1, and Flow Control to Hardware. Also make sure that all check boxes are un-checked.
5. On the Call Options tab, uncheck all the check boxes and add the setup string "S211=3&W" to the Special Modem Commands edit box.
6. Click OK.
7. Enter any TCP/IP settings necessary to connect to your FTP site.
8. Enter the dial string to dial to. If using an Airlink modem, enter 10.0.0.1 as the dial string, and make sure there is no area code, country code, etc. attached to the dial string.

16. Customize ServMan Mobile

Brief Description

ServMan Mobile can be customized for additional data capture on orders of ServMan fields or user-defined fields. Additional order tabs can be created to capture the additional data. In addition, default ServMan Mobile order tabs can be removed from ServMan Mobile so users don't see order tabs they may not use. Custom forms can also be created to synchronize data external from ServMan orders. These custom forms are accessed by menu options that appear in ServMan Mobile when the forms are created.

16.1. Create Custom Order Tabs

Use LC in ServMan to create custom tabs to be downloaded to ServMan Mobile and used for synchronizing user-defined data. Please call ServMan Customer Support for more information on custom ServMan Mobile order tabs.

16.2. Create Custom Forms

Use LC in ServMan to create custom forms to be downloaded to ServMan Mobile and used for synchronizing user-defined data. Please call ServMan Customer Support for more information on custom ServMan Mobile forms.