



Mobile Field Order System – User Manual

November 28, 2012 – Richard Rubenstein, Jargon Software –

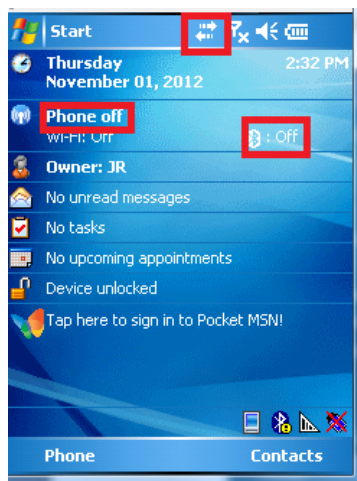
Agenda

- Walk thru “A Day in the Life”
- A few sample problems to work thru as a group.
- Individual time to practice

A Day in the Life

- Have both the handheld device and printer charging whenever possible.
- Consider having the phone (cellular Internet connection) and Bluetooth (printer) on only when needed.
- Consider AC inverter in truck to keep devices charging during the day.

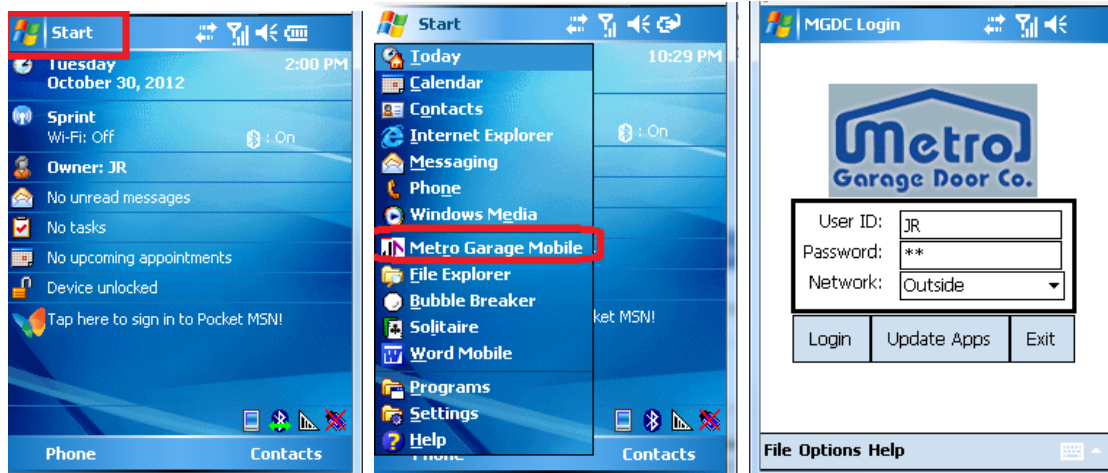
Ensure that the Phone is off until you want to use them. The phone is used to connect to Metro and the Bluetooth is used when printing or swiping credit cards. (You will not need the wi-fi)



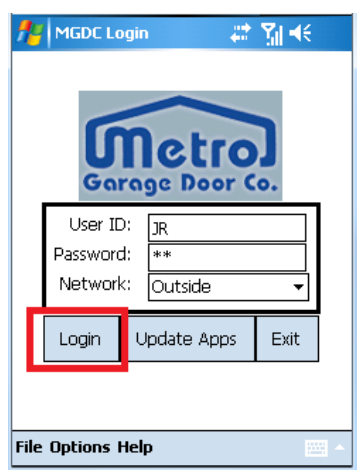
Tap to these icons to turn the features off or on.

Or, tap on the two opposing arrow near the top right of the screen if you can't get to the “desktop” screen. Use this icon when in the Metro Mobile App (see Appendix for more detail)

To run the mobile app, tap Start button, then “Jargon Reader”. You'll see login screen.



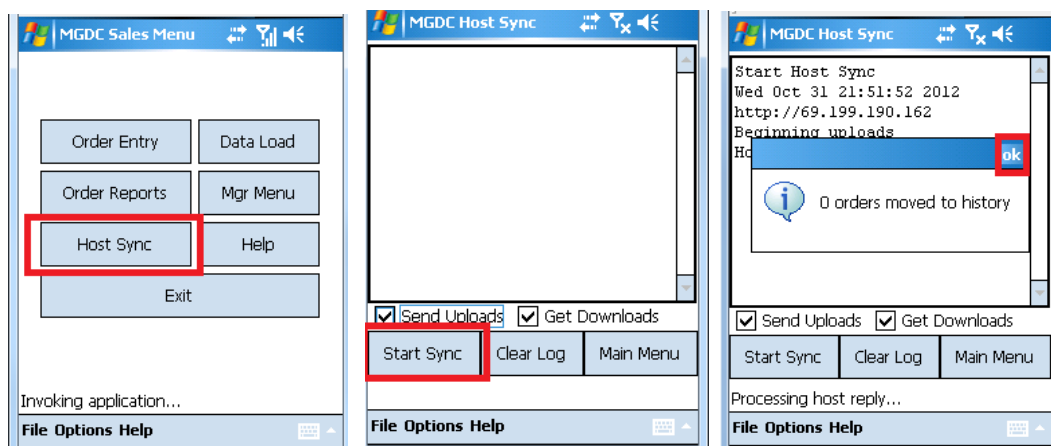
Use your rep ID (in upper case) to login. The password is your rep ID (in lower case). Tap Login button:



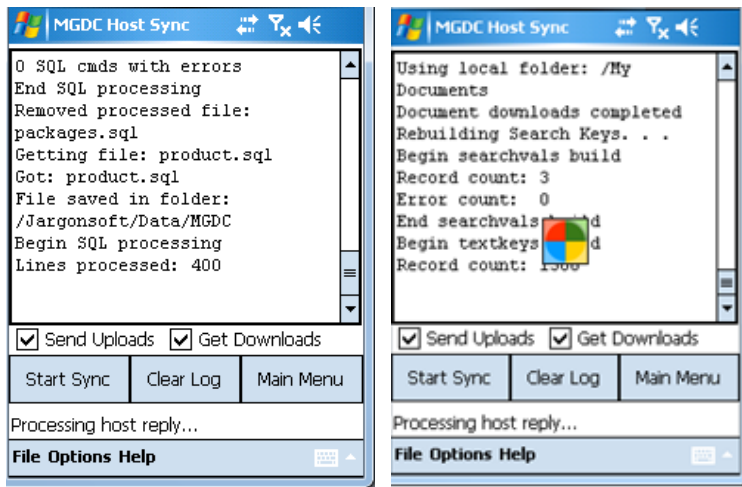
Synchronize with Metro office via Host Sync, Tap Start Sync to begin the process.

NOTE: You must be connected for this to work. This means the Phone must be turned on.

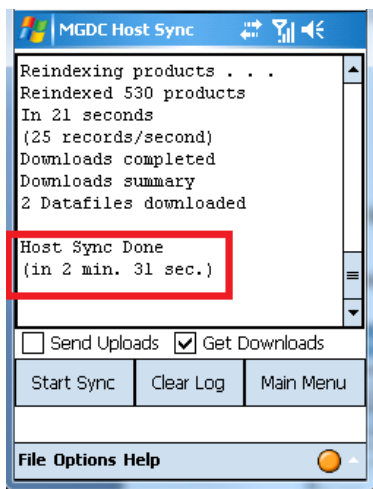
See "How To" at end of this document for how to connect.



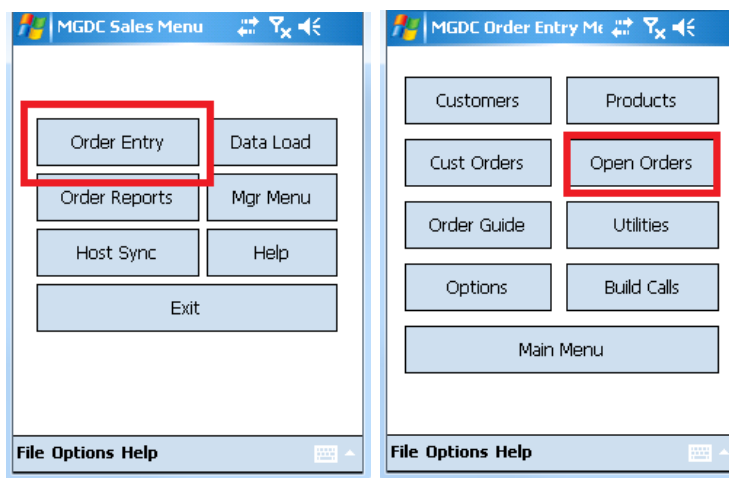
The Host Sync download will continue and will look something like these screens:



The host sync is complete when you've seen this message:



Now, go to Order Entry, Open Orders to fill your assigned work orders:



The orders appear in the sequence they are to be serviced:

The three screenshots show the 'Review Orders' window for different orders. The first screenshot shows order 163343 with a date of 10/30/2012. The second screenshot shows order 163550 with a date of 11/7/2012. The third screenshot shows order 163550 with a date of 11/7/2012 and special instructions: '10-2 call ahead install new opener with 2 tx's and leyless entry - door might have'. In all three, the 'Instructions' tab is selected and highlighted with a red box.

Adding Items:

Toggle the physical keys for numeric entry.

Press once (orange donut) for next character numeric or press twice (orange circle) for ALL following characters to be numeric.

The two screenshots show the 'Order Products' window. The first screenshot shows the 'Order Products' window with a red box around the 'Image' button. The second screenshot shows the 'Order Products' window with a red box around the 'Image' button, which is now highlighted with an orange circle.

Fixed Item Packages:

Scan bar code, or manually enter using keyboard and ENTER key:

The 'Order Products' screen displays the following information:

- Header: Doe John
- Item# 9131 with 'Get' and 'End Master Pkg' buttons.
- Navigation: '<', '>', 'Clr', and 'Search' buttons.
- Tabs: 'Product Info.', 'More', and 'Attributes'.
- Product Info: Item#: 9131, BarCd: 000000, Uom: Ea, Units: Price: \$8.95, Per: Ea. Description: 'Install 1/2hp opener w 2 remotes 3255 keyless'. An 'Image' button is also present.
- Buttons: 'Order Item', 'View Lines', 'View Order', 'Add To Guide', 'View Guide', and 'Menu'.
- Footer: 'File Options Help'.

Choose from items in the package, use combo box, physical keys, or soft keypad:

The 'Order Guide' screen shows a list of items in a package:

Product No.	Qty	UM	Price
5033255	1	Ea	214.99/Ea
6015371	1	Ea	50.22/Ea
6174	1	Ea	93.38/Ea
998	7	Ea	24.00/Ea

Below the list, a summary line shows: 5033255 1 1 Ea 0.00 Sv. The description 'Liftmaster 3255 Security + 315MHZ' is followed by a 'KP' button. At the bottom are buttons for 'Order', 'Review', 'Back', 'Up', 'Search', 'Reset', 'Details', 'Custs', 'Dn', and 'Menu'.

The 'Numeric Keypad' screen is used for entering quantities. It features a numeric keypad with digits 0-9, '+/-' for negative values, and a decimal point. A 'Qty Sold' field at the top shows the value '25'. Below the keypad are 'Save' and 'Cancel' buttons.

Order the selected items:

This screenshot shows the 'Order Guide' screen with the 'Order' button at the bottom highlighted with a red box.

This screenshot shows the 'Order Guide' screen after the 'Order' button was pressed. A confirmation message box is displayed in the center, stating: '5 line item(s) added to order'. The 'ok' button on the message box is highlighted with a red box.

Reviewing the order:

The first screenshot shows the 'Order Products' window with 'Item#: 908' and 'REPLACE ONE TORSION SPRING'. The 'View Lines' button is highlighted with a red box. The second screenshot shows the 'Order Lines' window with a table of items and the 'Back' button highlighted with a red box. The third screenshot shows the 'Review Orders' window with order details and the 'Add Lns' button highlighted with a red box.

Prod#	Qty	UOM	Extension
9131	1	Ea	\$340.00
5033255	1	Ea	\$0.00
6015371	1	Ea	\$0.00
6174	1	Ea	\$0.00
998	7	Ea	\$0.00

Open Item (Quoted) Packages

Scan bar code, or manually enter using keyboard and ENTER key:

Enter quoted price

The first screenshot shows the 'Order Products' window with 'Item#: 9131' and 'Install 1/2hp opener w 2 remotes 3255 keyless'. The second screenshot shows the 'Order Item' window with 'Item# 92' and 'Price 0.00'. The 'Keypad' button is highlighted with a red box. The third screenshot shows the 'Numeric Keypad' window with 'Ea Price 1200' and the 'Save' button highlighted with a red box.

Order Item

Item# 92
Barcode: 000000 Config

Installed door and opener per quote

Qty Ord. 1 1 Ea

Price 1200 Show Price Type

Disc. 0.00 Pct Keypad

Instr. none

Accept Cancel Image

Item# 92
File Options Help

Accept the Price:

Enter the individual items in the open package:

Scan bar code, or manually enter using GET button or ENTER key

Order Products

Dick - Test

Item# 1005 Get End Master Pkg

Product Info. More Attributes

Item#: Image

BarCd: Uom:

Units: Per:

Price:

Order Item View Lines View Order

Add To Guide View Guide Menu

File Options Help

Order Item

Item# 1005
Barcode: 000000 Config

BOTTOM FIXTURE COMM 2" L.H.

Qty Ord. 1 25 Ea

Price .00 Show Price Type

Disc. 0.00 Pct Keypad

Instr. none

Accept Cancel Image

Item# 1005
File Options Help

Closing the Package: Once closed it cannot be reopened. Delete or start another package.

Order Products

Dick - Test

Item# Get End Master Pkg

Product Info. More Attributes

Item#: Image

BarCd: Uom:

Units: Per:

Price:

Order Item View Lines View Order

Add To Guide View Guide Menu

File Options Help

Order Products

Dick - Test

Item# Get End Master Pkg

Product Info. More Attributes

Item#: Image

BarCd: Uom:

Units: Per:

Price:

Order Item View Lines View Order

Add To Guide View Guide Menu

File Options Help

Processing event...

File Options Help

Order Products

Dick - Test

Item# Get End Master Pkg

Product Info. More Attributes

Item#: Image

BarCd: Uom:

Units: Per:

Price:

Order Item View Lines View Order

Add To Guide View Guide Menu

File Options Help

Processing event...

File Options Help

End Master Package

Is master package 92 completed?

Yes No

No more items can be added to package: 92

Ok

Reviewing the Order:

Prod#	Qty	UOM	Extension
9131	1	Ea	\$340.00
5033255	1	Ea	\$0.00
6015371	1	Ea	\$0.00
6174	1	Ea	\$0.00
998	7	Ea	\$0.00
92	1	Ea	\$1200.00
1005	1	Ea	\$0.00

Sort by: Line Number

Edit Line Delete Line Back

File Options Help

Order Individual Items.

Scan bar code, or manually enter using keyboard and ENTER key:

Order Products

Doe John

Item# 124222 Get End Master Pkg

Product Info. More Attributes

Item#: Image

BarCd: Uom:

Units: Price: Per:

Order Item View Lines View Order

Add To Guide View Guide Menu

File Options Help

Order Item

Item# 124222

Barcode: 000000 Config

DRUM, L.H. 1100-18

Qty Ord. 1 2 Ea

Price 47.13 Show Price Type

Disc. 0.00 Pct Keypad

Instr. none

Accept Cancel Image

Item# 124222

File Options Help

Prod#	Qty	UOM	Extension
9131	1	Ea	\$340.00
5033255	1	Ea	\$0.00
6015371	1	Ea	\$0.00
6174	1	Ea	\$0.00
998	7	Ea	\$0.00
92	1	Ea	\$1200.00
1005	1	Ea	\$0.00
124222	2	Ea	\$94.26

Sort by: Line Number

Edit Line Delete Line Back

File Options Help

Reviewing the Order.

Recording Payment (Required) For now, do NOT process credit cards

Review Orders

Doe John View Cust

Ord# 163550 new New Credit

Order Data Instructions

Ord Dt 11/7/2012 8 Lns \$1,634.26

Req Dt 11/7/2012 Type Sale

P.O.#

Terms COD (1)

Shipvia OUR TRUCK (TRUCK)

Discnt Pct PM

Add Lns Save Pmt Print

View Lns Delete Comments Menu

File Options Help

Payment Info

Pmt Amt 0.00 Inv. Amt

Paid By None Swipe CC

CC/Chk#

Exp Dt (MM/YY)

CVV Cd (on back of CC)

Zip Cd KeyPad

Name: Authorize Credit Card

Approval

Save Sign Clr Back

File Options Help

Payment Info

Pmt Amt 0.00 Inv. Amt

Paid By None Swipe CC

CC/Chk#

Exp Dt (MM/YY)

CVV Cd (on back of CC)

Zip Cd KeyPad

Name: Authorize Credit Card

Approval

Save Sign Clr Back

Processing event...

File Options Help

Pay Invoice Total?

Pay invoice total: \$1,634.26 ?

Yes No

Authorize Credit Card

Approval

Save Sign Clr Back

File Options Help

Select payment type, enter details, and capture signature.

Payment Info

Pmt Amt 1,634.26 Inv. Amt

Paid By Check Swipe CC

CC/Chk# 12345

Exp Dt (MM/YY)

CVV Cd (on back of CC)

Zip Cd KeyPad

Name: Authorize Credit Card

Approval

Save Sign Clr Back

File Options Help

Signature Capture

Please sign and press Accept

Accept Clear Cancel

File Options Help

Review Orders

Doe John View Cust

Ord# 163550 new New Credit

Order Data Instructions

Ord Dt 11/7/2012 8 Lns \$1,634.26

Req Dt 11/7/2012 Type Sale

P.O.#

Terms COD (1)

Shipvia OUR TRUCK (TRUCK)

Discnt Pct PM

Add Lns Save Pmt Print

View Lns Delete Comments Menu

File Options Help

Payment of \$1634.26 has been saved.

Ok

Adding Comments

Review Orders

Doe John View Cust

Ord# 163550 new New Credit

Order Data Instructions

Ord Dt 11/7/2012 8 Lns \$1,634.26

Req Dt 11/7/2012 Type Sale

P.O.#

Terms COD (1)

Shipvia OUR TRUCK (TRUCK)

Discnt Pct PM

Add Lns Save Pmt Print

View Lns Delete Comments Menu

File Options Help

WO Comments

Standard Comments

Thanks very much for your business.

Add to WO View Full Text

Work Order Comments

Remove From WO Done

File Options Help

WO Comments

Standard Comments

Thanks very much for your business.

Add to WO View Full Text

Work Order Comments

Thanks very much for your business.

Remove From WO Done

File Options Help

Printing the Receipt

Review Orders

Doe John View Cust

Ord# 163550 new New Credit

Order Data Instructions

Ord Dt 11/7/2012 8 Lns \$1,634.26

Req Dt 11/7/2012 Type Sale

P.O. #

Terms COD (1)

Shipvia OUR TRUCK (TRUCK)

Discont Pct PM

Add Lns Save Pmt Print

View Lns Delete Comments Menu

File Options Help

Print Order

Print To: BlueTooth

Font: 9 No. Copies: 2

Print Sign Clear Back

File Options Help

Print Order

Print To: BlueTooth

Font: 9 No. Copies: 2

Print Sign Clear Back

Printing via BlueTooth Port 3

File Options Help

ORDER ACKNOWLEDGEMENT

ORDER NUMBER: JR-163550

Metro Garage Door Co.
8175 Lewis Road
Golden Valley, MN 55427
sales@metrogaragedoor.com
http://www.metrogaragedoor.com
763.535.4774 (Fax 763.398.0495)

ORDER DATE: 11/7/2012
CUSTOMER ID: 163550
Doe John -
1235 River Side Drive
Fridley, MN 55432
(763) 888-8888

Tech: JR - User 01

TERMS: COD (1)

Product#	Description	Qty	Price/UOM	Total
9131	Install 1/2hp opener w 2 remotes 3255 keyless	1	\$340.00/Ea	\$340.00
** Package consists of:				
5033255	Liftmaster 3255 Security + 315MHZ	1		
6015371	371LM transmitter	1		
6174	LM wireless keyless entry	1		
998	Residential labor	?		
92	Installed door and opener per quote	1	\$1200.00/Ea	\$1,200.00
** Package consists of:				
1005	BOTTOM FIXTURE COMM 2" L.H.	1		
124222	DRUM, L.H. 1100-18	2	\$47.13/Ea	\$94.26

Order Total \$1,634.26

Payment - Check 12345 \$1,634.26CR
Balance Due \$0.00

10-2 call ahead install new opener with 2 tx's and keyless entry - door might have

Thanks very much for your business.

Garage doors installation labor is warranted for a period of 1 (one) year from the date of installation. The garage door product is warranted by the manufacturer for the period identified in the manufacturer's product literature. (Note this period will vary by manufacturer and product.)

Metro Garage Door Company reserves the right to declare work on a certain garage doors and openers as not eligible for warranty coverage. This situation may arise if the door or opener is repairable for a short time but will not last due to its deteriorated condition and the homeowner does not want to replace the door or opener even though it should be. If this situation arises a "NO WARRANTY" will be noted on the customer receipt.

All work will be scheduled during normal business hours Monday thru Friday.

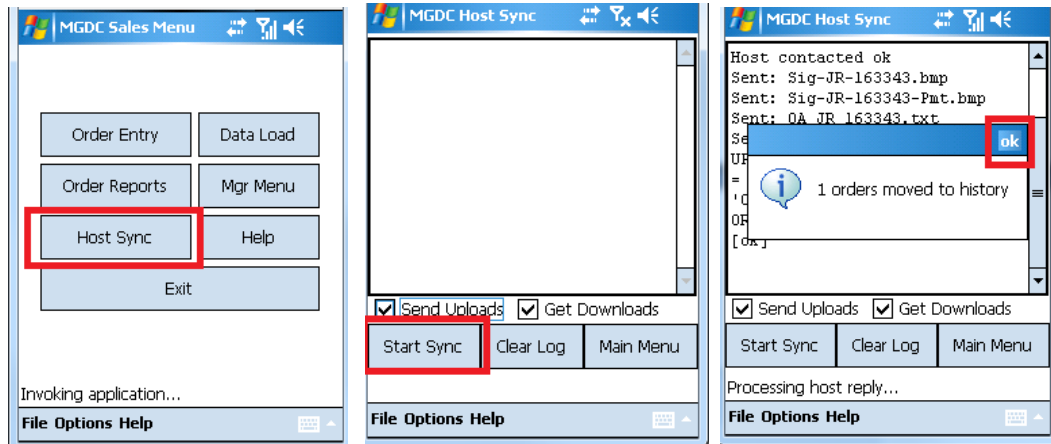
* Thank you for your order! *

Prt'd: Thu Nov 8 14:40:19 2012

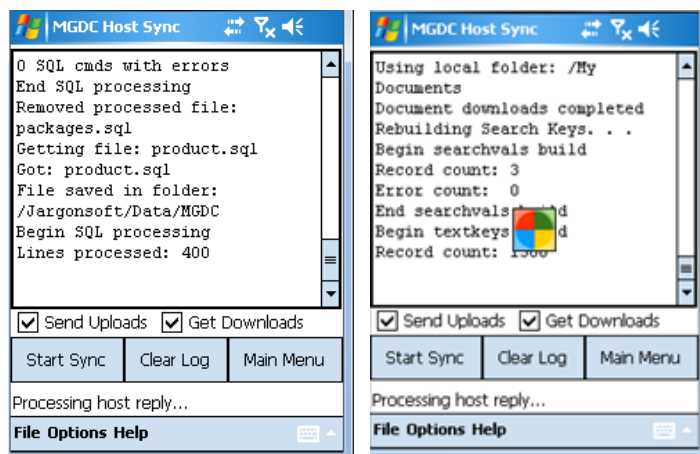
Upload the Orders

Synchronize with Metro office via Host Sync, Tap Start Sync to begin the process.

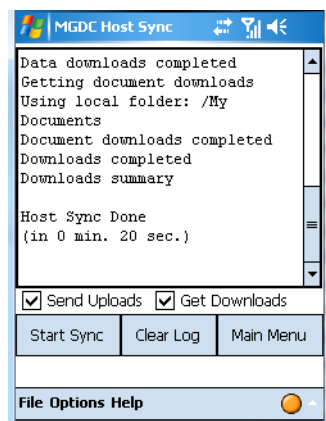
NOTE: You must be connected for this to work. This means the Phone must be turned on.



The Host Sync download will continue and will look something like these screens:



The host sync is complete when you've seen this message:



Restocking Report (at office):

ForceField Reports Login

LEGAL NOTICE: For internal use only - unauthorized access forbidden

Please log in

User ID

Password

Login

Clear

ip



ForceField Reports Menu

Inventory Reports

Truck Restocking Report

ForceField Truck Restocking Report - Selections

From Date Thru Date

To run report for today, leave From Date and Thru Date blank

To run report for one date other than today, enter it in From Date, and leave Thru Date blank.

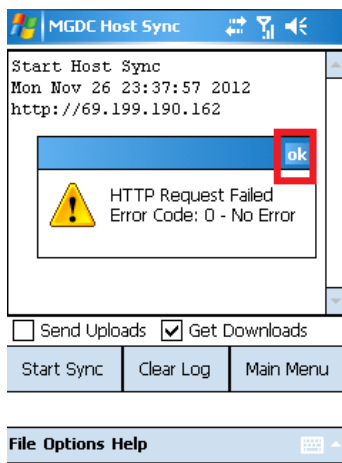
To run report for a range of dates, enter From Date and Thru Date (format mm/dd/yy).

Truck Restocking Report

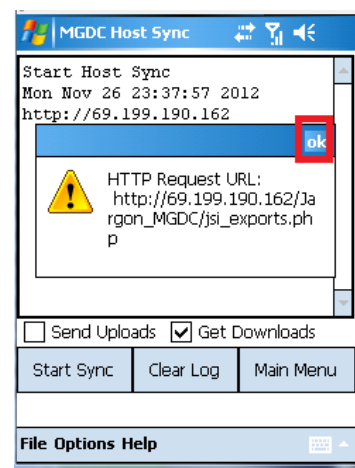
Loc	Part No.	Description	Restock Qty
JR	1005	BOTTOM FIXTURE COMM 2" L.H.	1
JR	124222	DRUM, L.H. 1100-18	2
JR	5033255	Liftmaster 3255 Security + 315MHZ	1
JR	6015371	371LM transmitter	1
JR	6174	LM wireless keyless entry	1

How To

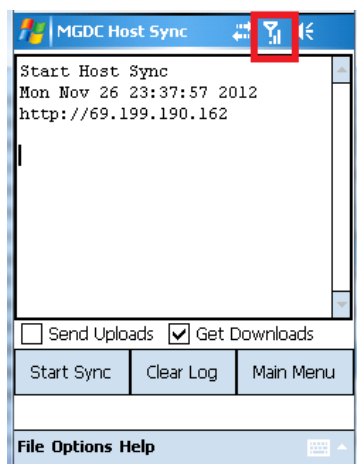
- **Warm Reset** – Tap and HOLD power button down for 10 seconds until you see a white Motorola splash screen appear.
- **Cold Reset**- While holding the “1” and “9” keys, tap and hold the power button for 10 seconds until you see a white Motorola splash screen appear. You will also need to set the date and time. Do this by tapping on the date/time icon.
- **Make a data connection** – If you do not have a connection, you’ll see this when trying to host sync:



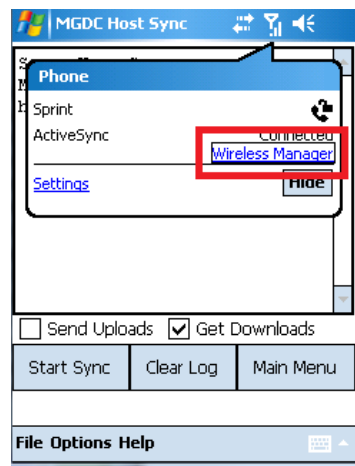
followed by:



To fix, tap the phone connection icon:



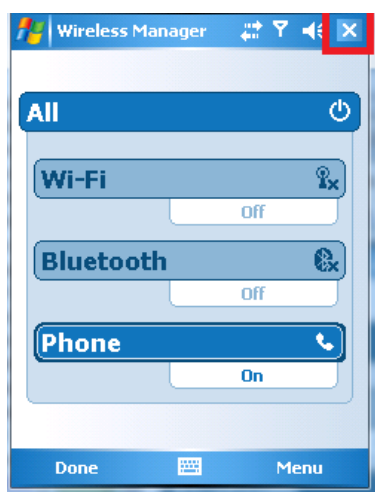
Tap Wireless Manager:



Tap to turn the phone off:

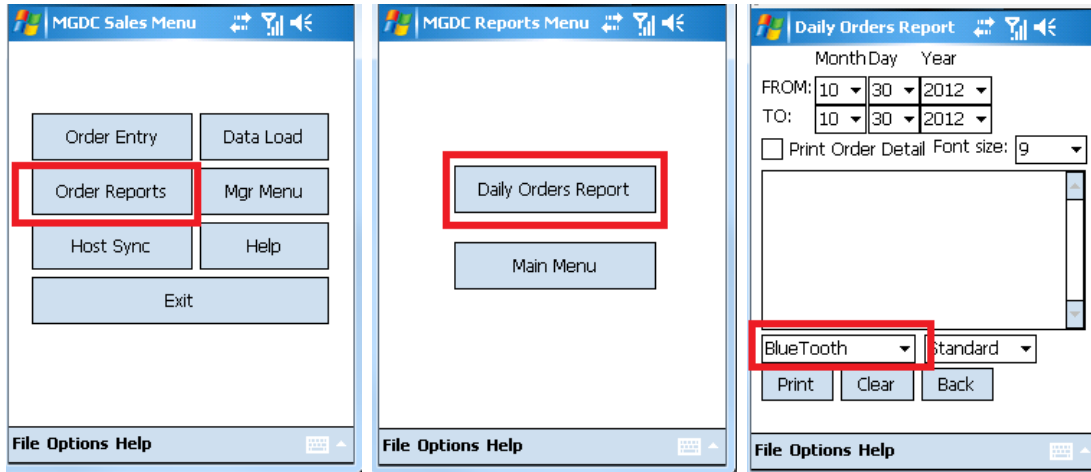


Now, tap again to turn it back on:

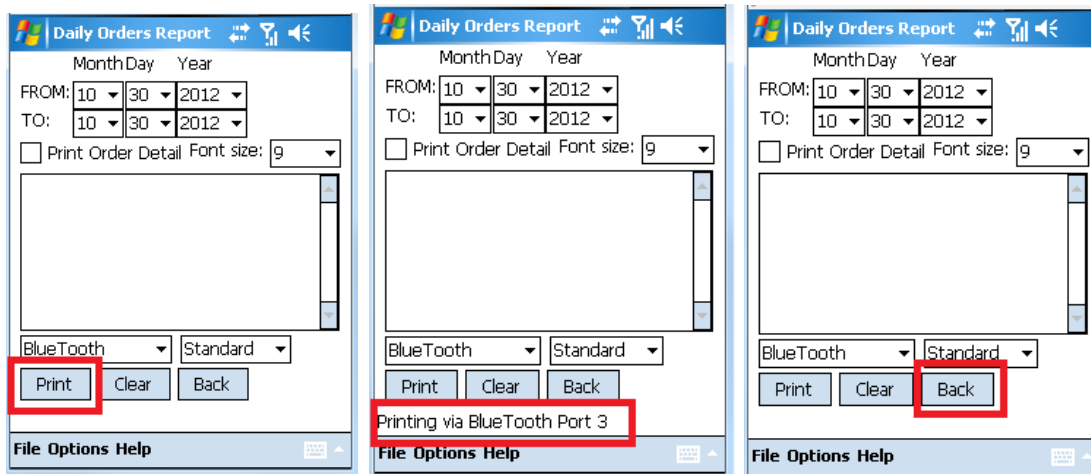


- **Check Bluetooth printer (optional)**

If desired, check the Bluetooth printer by printing a small, sample report. Tap Order Reports button, then Daily Orders Report: (Be sure the Bluetooth is on and the printer is also on with blue light blinking)



Tap Print button. You should see a message saying it's printing. Click Back button when done.



Go back to the Main Menu.

