



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.

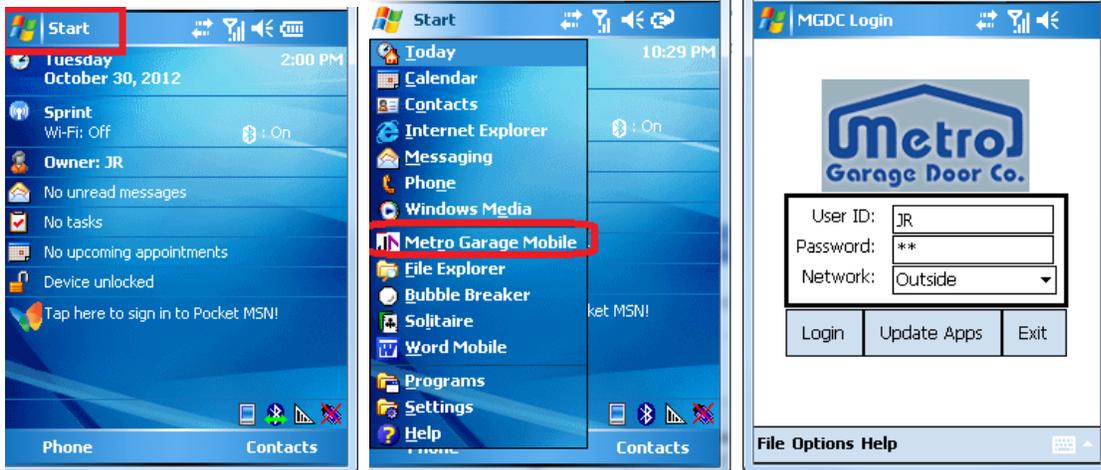
Ensure that the Phone is off until you want to use them. The phone is used to connect to Metro and the Bluetooth is used when printing or swiping credit cards. (You will not need the wi-fi)



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.



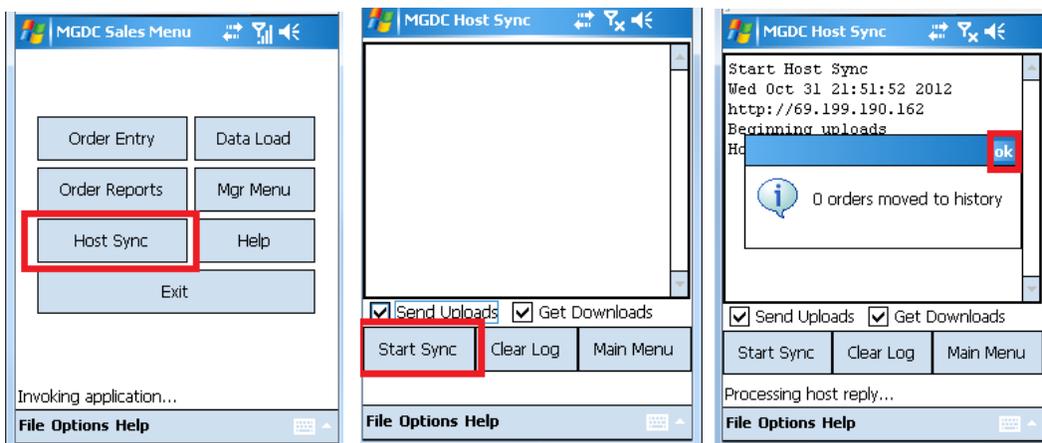
Use your rep ID (in upper case) to login. The password is your rep ID (in lower case). Tap Login button:



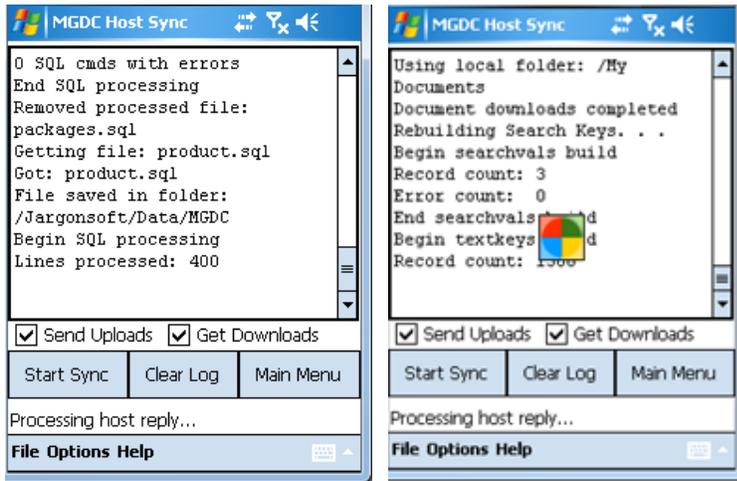
Synchronize with Metro office via Host Sync, Tap Start Sync to begin the process.

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

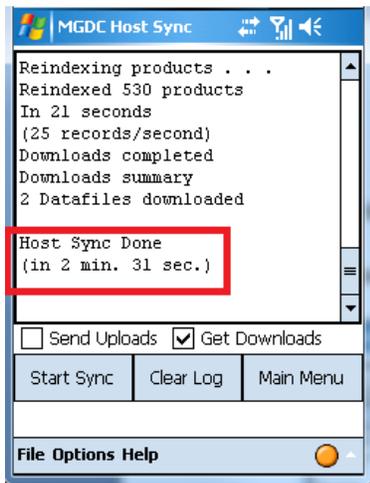
See "How To" at end of this document for how to connect.



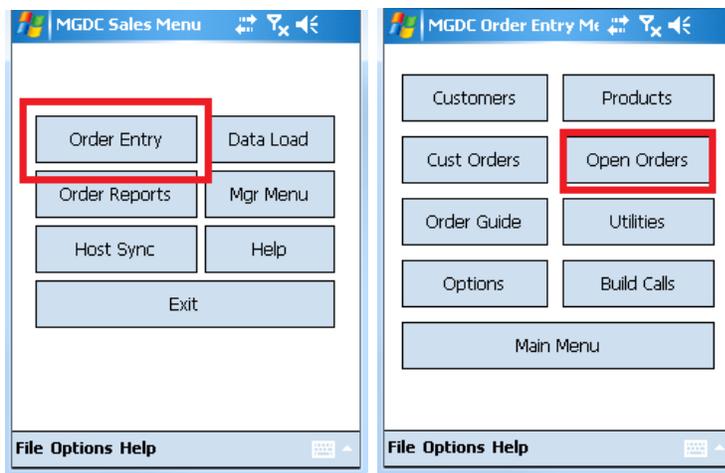
The Host Sync download will continue and will look something like these screens:



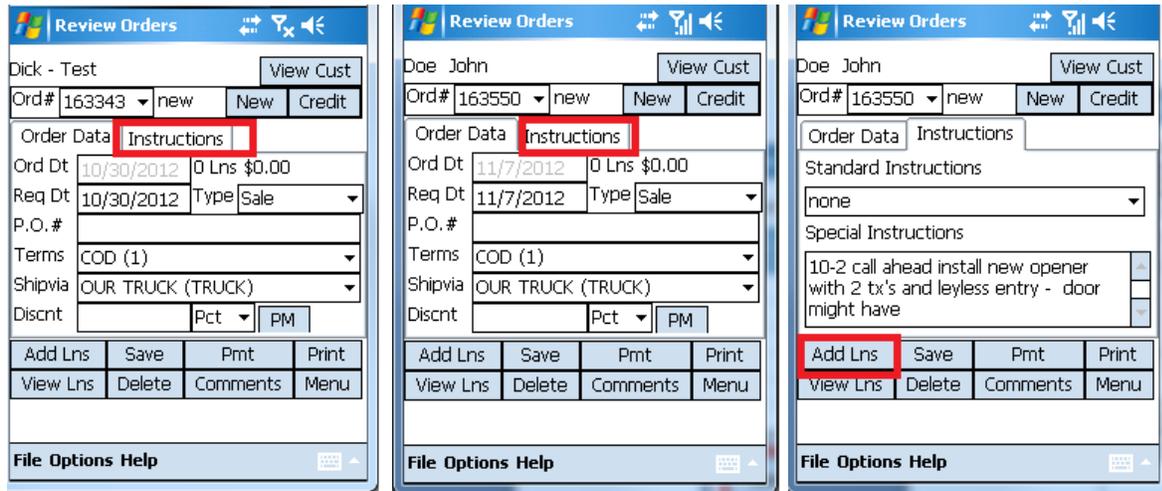
The host sync is complete when you've seen this message:



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



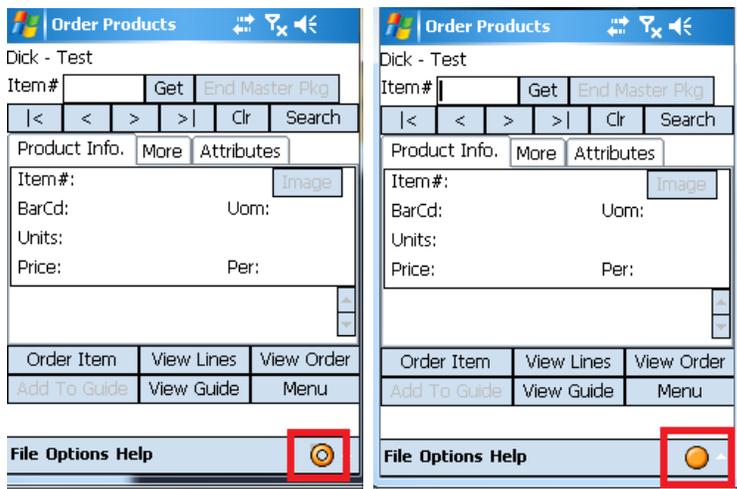
The orders appear in the sequence they are to be serviced:



Adding Items:

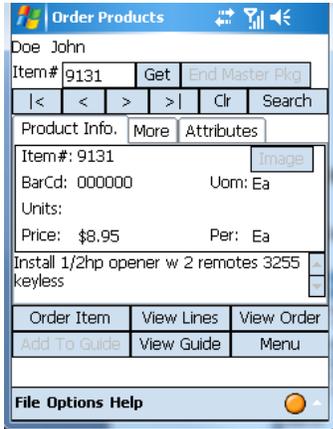
Toggle the physical keys for numeric entry.

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

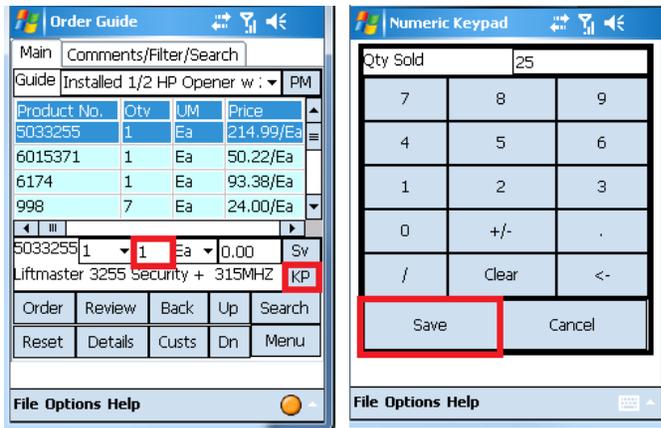


Fixed Item Packages:

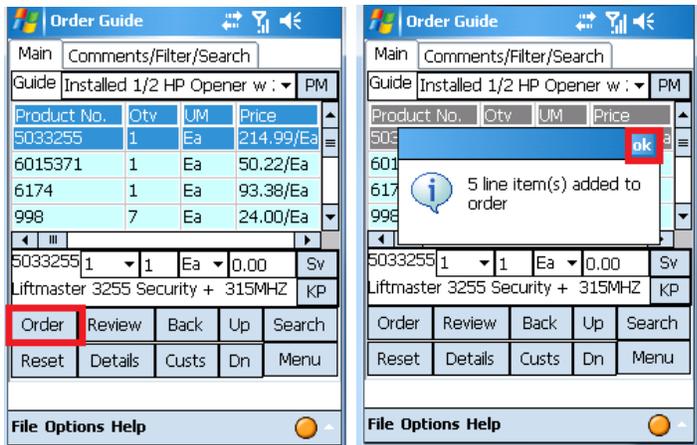
Scan bar code, or manually enter using keyboard and ENTER key:



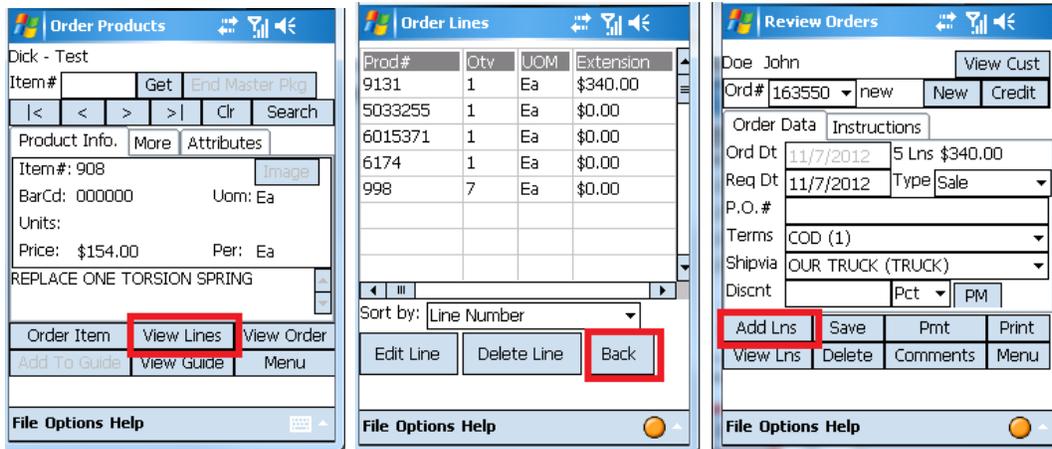
Choose from items in the package, use combo box, physical keys, or soft keypad:



Order the selected items:



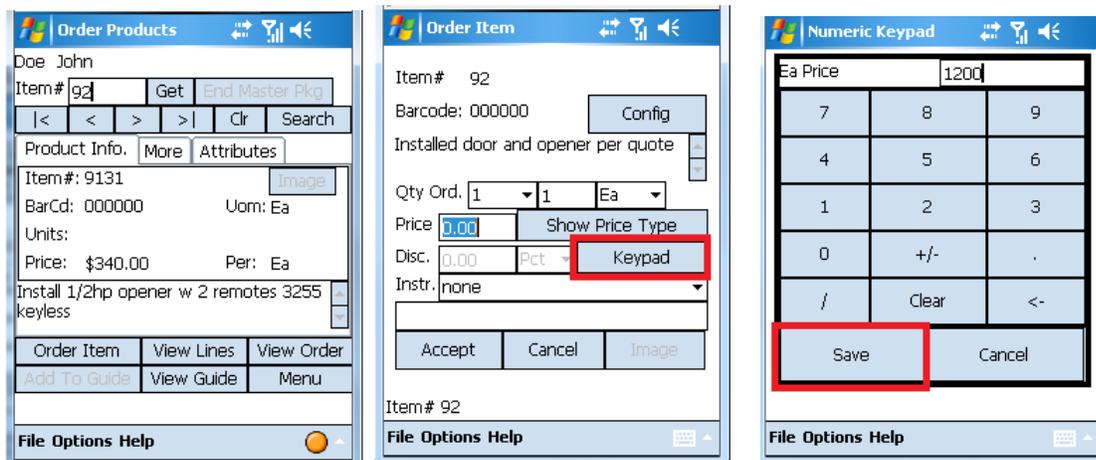
Reviewing the order:

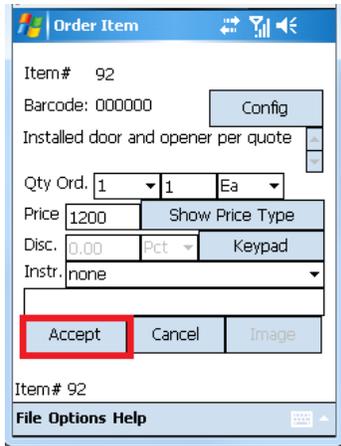


Open Item (Quoted) Packages

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

Enter quoted price

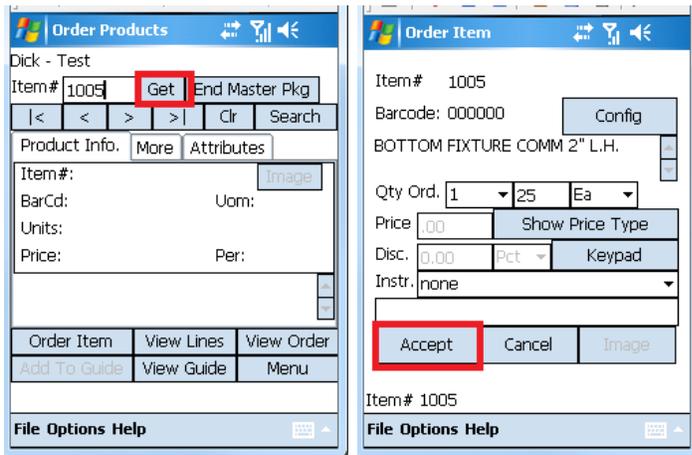




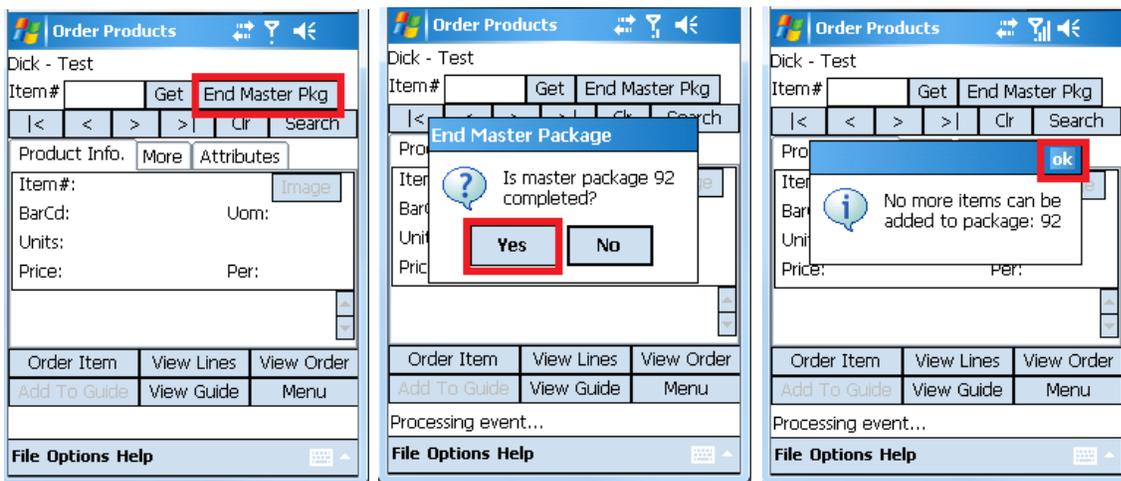
Accept the Price:

Enter the individual items in the open package:

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



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



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

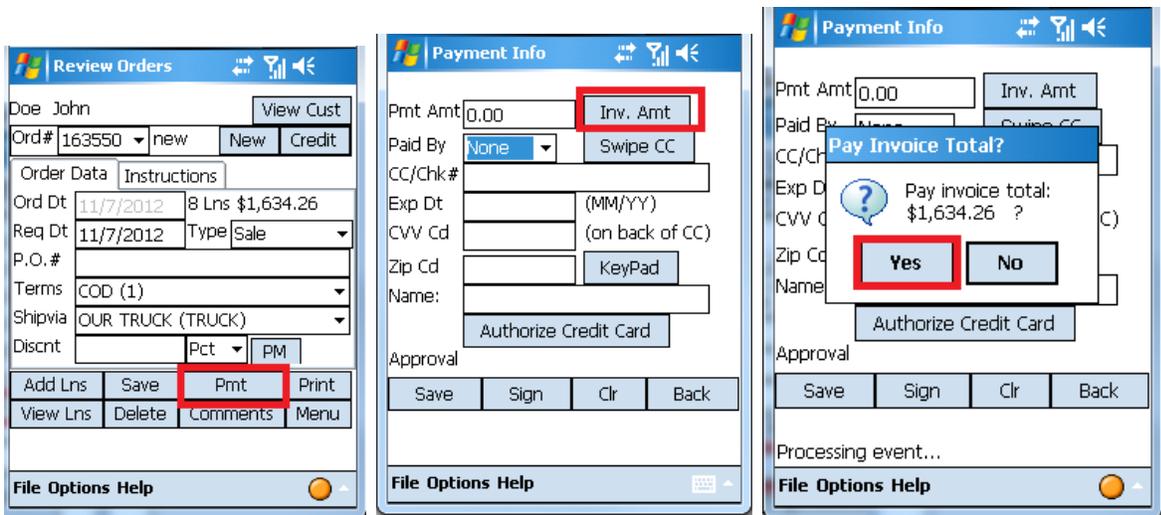
Sort by: Line Number

Edit Line Delete Line Back

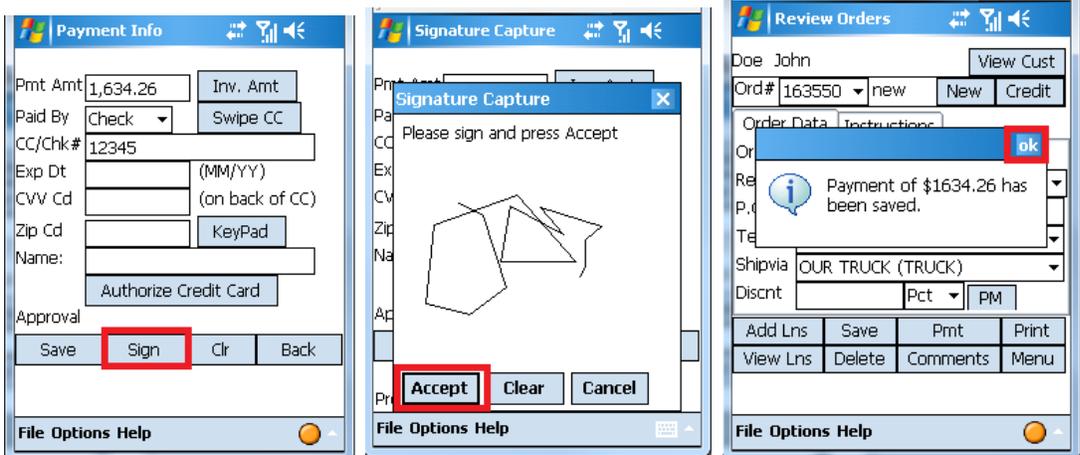
File Options Help

Reviewing the Order.

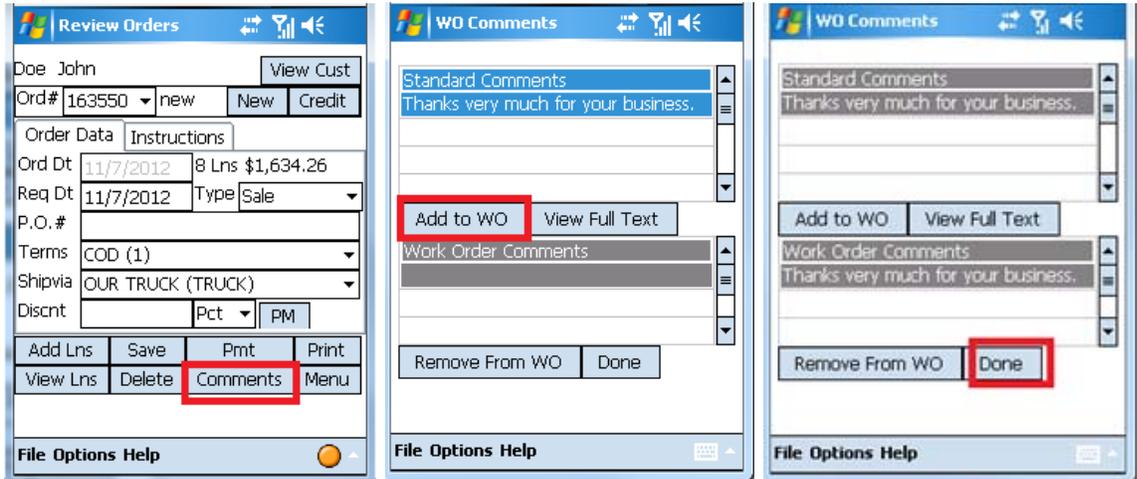
Recording Payment (Required) For now, do NOT process credit cards



Select payment type, enter details, and capture signature.



Adding Comments



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)

Discnt 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.

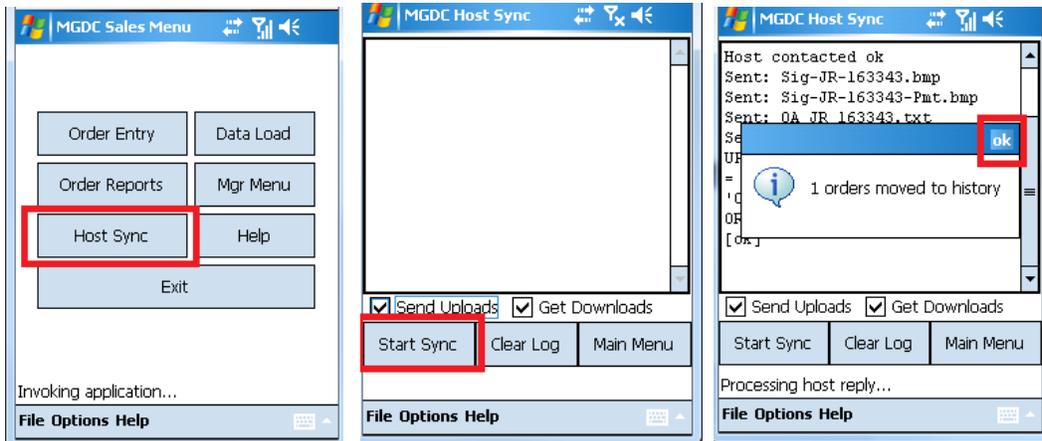
* Thank you for your order! *

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

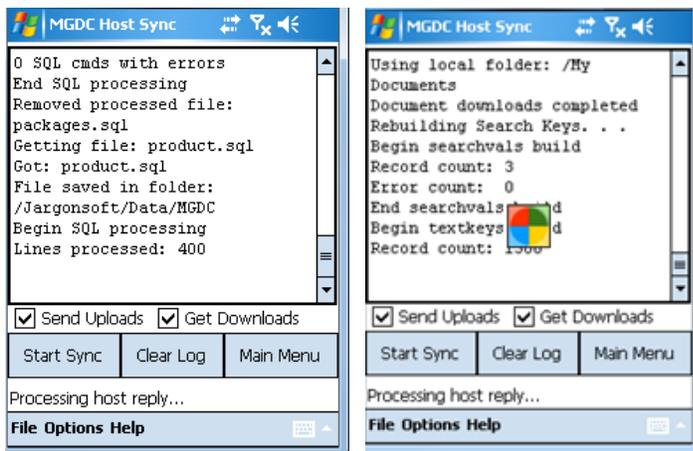
Upload the Orders

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

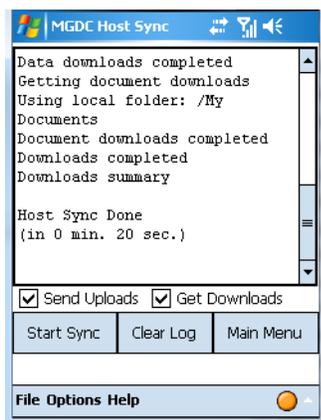
NOTE: You must be connected for this to work. This means the Phone must be turned on.



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

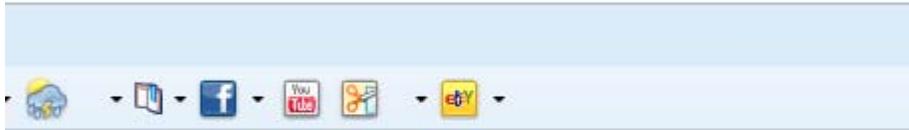
User ID

Password

Login

Clear

IP



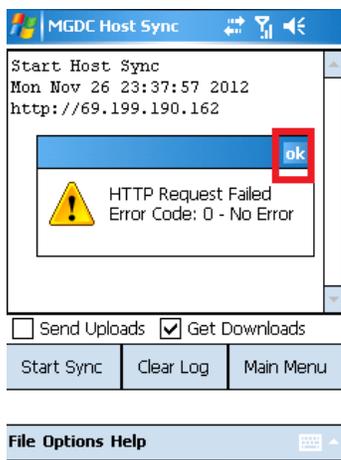
ForceField Reports Menu

Inventory Reports

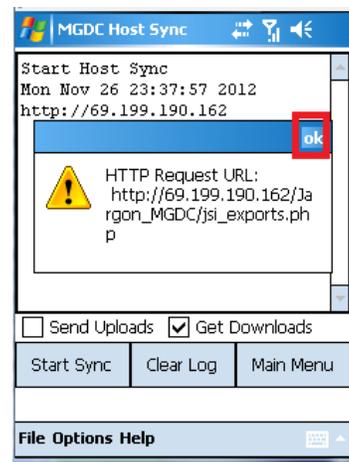
Truck Restocking Report

How To

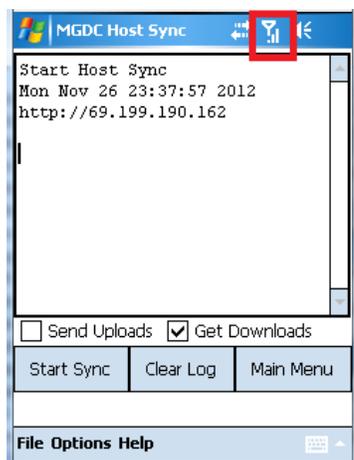
- **Warm Reset** – Tap and HOLD power button down for 10 seconds until you see a white Motorola splash screen appear.
- **Cold Reset**- While holding the “1” and “9” keys, tap and hold the power button for 10 seconds until you see a white Motorola splash screen appear. You will also need to set the date 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:

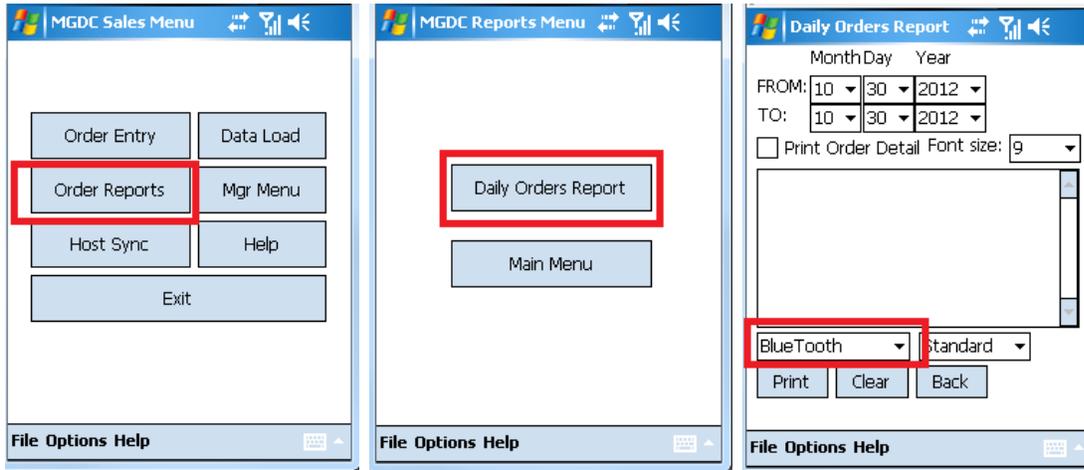


Now, tap again to turn it back on:

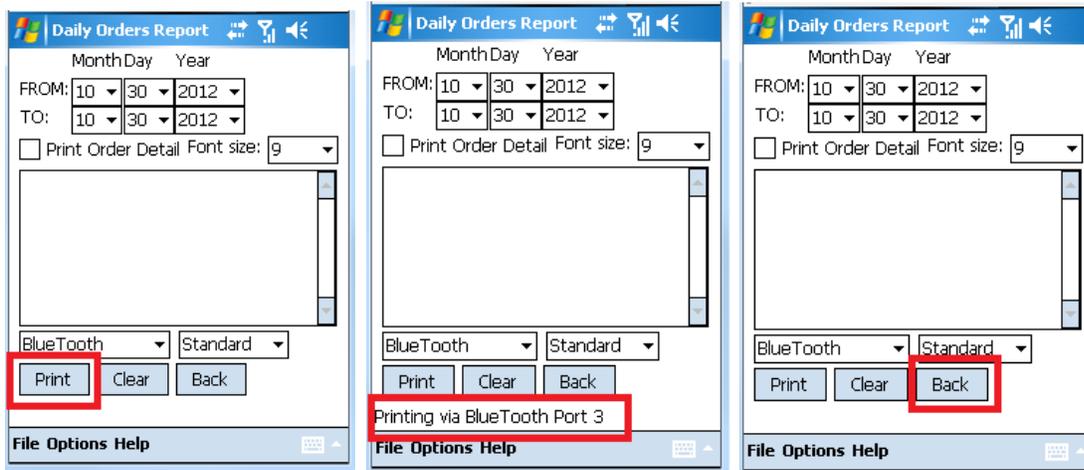


- **Check Bluetooth printer (optional)**

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.

