

# Performing Service Work in the Field

Version 1.0



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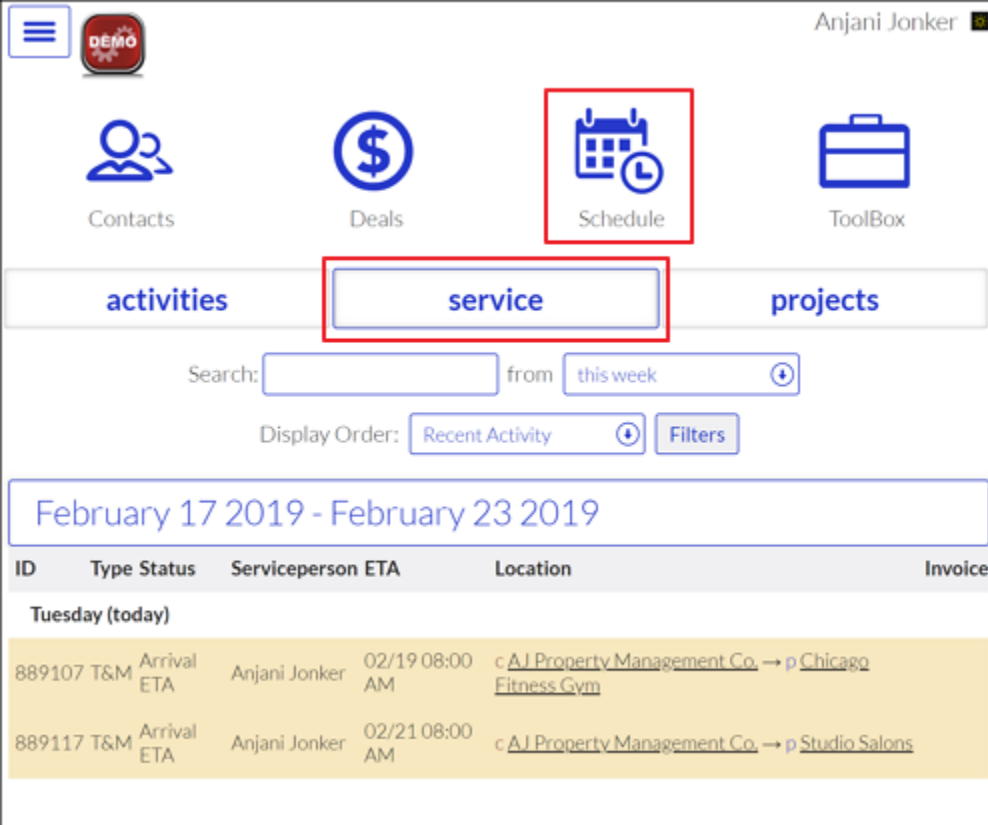
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(855) 424-3723 or [support@fcscontrol.com](mailto:support@fcscontrol.com)

# Accessing the Service Ticket

## Step 1

You've scheduled your service ticket on the Powerboard and now it's time for your technician to perform the service work. This guide will walk your service technician through the steps of completing a service ticket.

Navigate to your service schedule to view and access your tickets.



The screenshot shows a software interface for a service technician. At the top right, the user's name "Anjani Jonker" is displayed. Below this are four main navigation icons: "Contacts" (person icon), "Deals" (dollar sign icon), "Schedule" (calendar icon with a clock, highlighted with a red box), and "ToolBox" (toolbox icon). Below these icons are three tabs: "activities", "service" (highlighted with a red box), and "projects". Under the "service" tab, there is a search bar with a dropdown menu set to "this week", a "Display Order" dropdown set to "Recent Activity", and a "Filters" button. Below the search and filter options is a date range selector showing "February 17 2019 - February 23 2019". At the bottom, there is a table with the following columns: ID, Type Status, Serviceperson, ETA, Location, and Invoice.

| ID                     | Type Status           | Serviceperson | ETA               | Location   | Invoice |
|------------------------|-----------------------|---------------|-------------------|--|---------|
| <b>Tuesday (today)</b> |                       |               |                   |  |         |
| 889107                 | T&M<br>Arrival<br>ETA | Anjani Jonker | 02/19 08:00<br>AM | c <a href="#">AJ Property Management Co.</a> → p <a href="#">Chicago Fitness Gym</a> |         |
| 889117                 | T&M<br>Arrival<br>ETA | Anjani Jonker | 02/21 08:00<br>AM | c <a href="#">AJ Property Management Co.</a> → p <a href="#">Studio Salons</a>       |         |

## Step 2

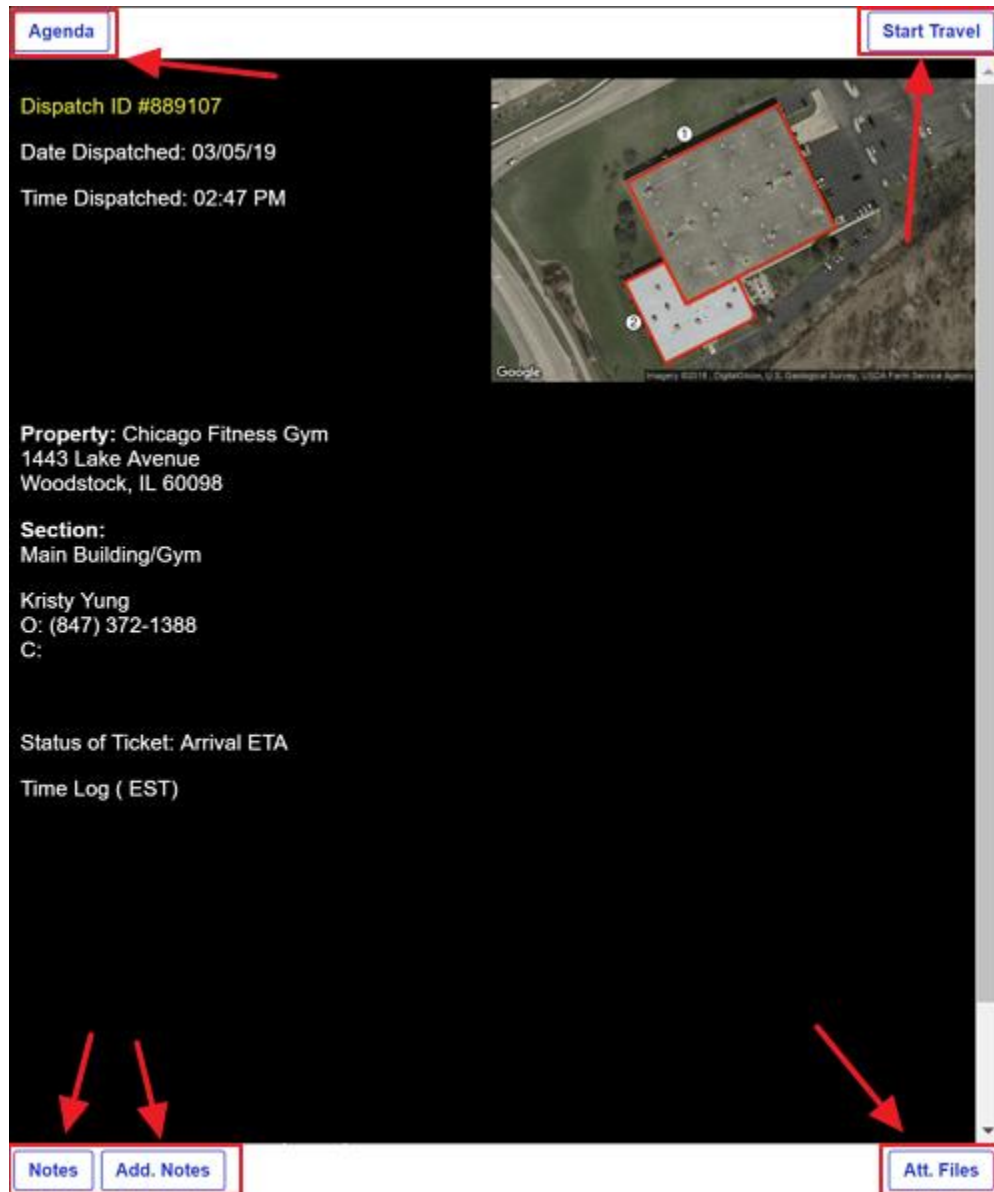
In your service schedule, you will see your service tickets containing the invoice ID, Type, Status, serviceperson it is assigned to, ETA time and date, and the location the ticket is assigned to. Tap on the invoice id to get into the ticket.

| February 17 2019 - February 23 2019 |      |                |               |                   |  |         |
|-------------------------------------|------|----------------|---------------|-------------------|--|---------|
| ID                                  | Type | Status         | Serviceperson | ETA               | Location   | Invoice |
| <b>Tuesday (today)</b>              |      |                |               |                   |  |         |
| 889107                              | T&M  | Arrival<br>ETA | Anjani Jonker | 02/19 08:00<br>AM | c <a href="#">A.J. Property Management Co.</a> → p <a href="#">Chicago Fitness Gym</a> |         |
| 889117                              | T&M  | Arrival<br>ETA | Anjani Jonker | 02/21 08:00<br>AM | c <a href="#">A.J. Property Management Co.</a> → p <a href="#">Studio Salons</a>       |         |

### Step 3

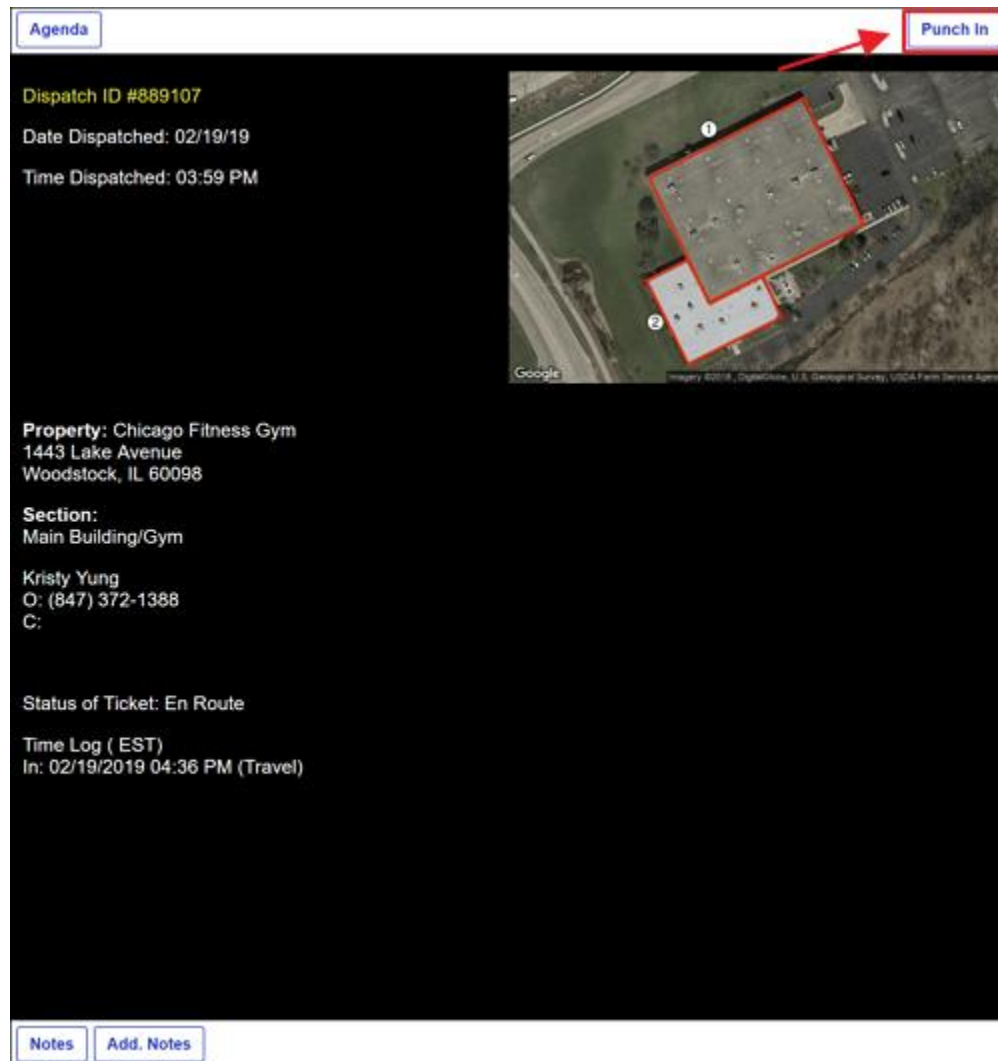
You will be presented with the ticket information such as the date and time dispatched, property address, contact name, and phone number, etc. Selecting the "Notes" button at the bottom of the page will let you see any dispatch notes that were made by the office. Selecting "Add. Notes" will let you see the property specific notes such as hours of operation, check in and out procedures, etc. If there are any attached documents, you will select the "Att. Files" button at the bottom right. Selecting "Agenda" will bring you back to your schedule.

When you are ready to punch in for travel, select the "Start Travel" button located at the top right.



## Step 4

Once you get to the site, pull your device out and go back into the ticket just like you did in step 2. You will notice that instead of "Start Travel" you now have the option to "Punch In". Select the "Punch In" button to punch in for labor.

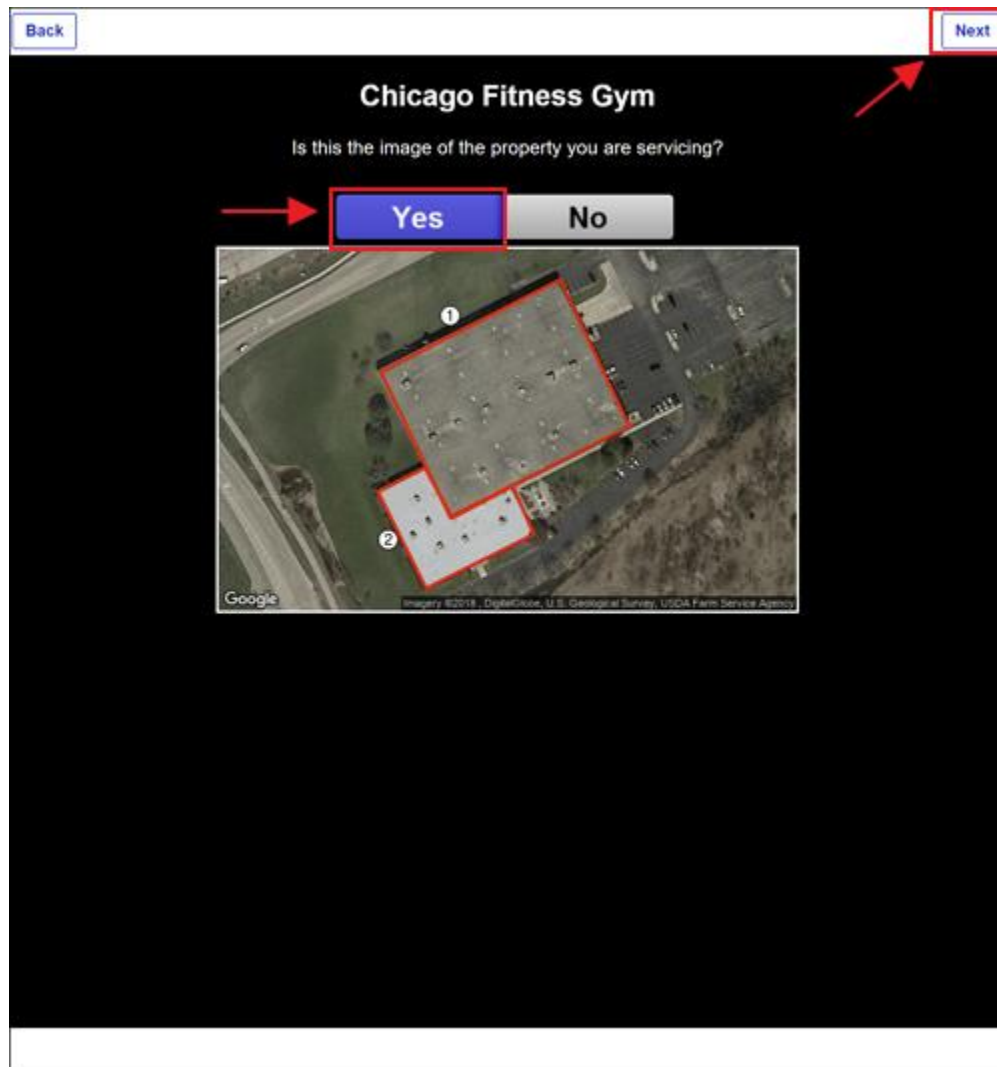


# Verifying Images and Sections

## Step 5

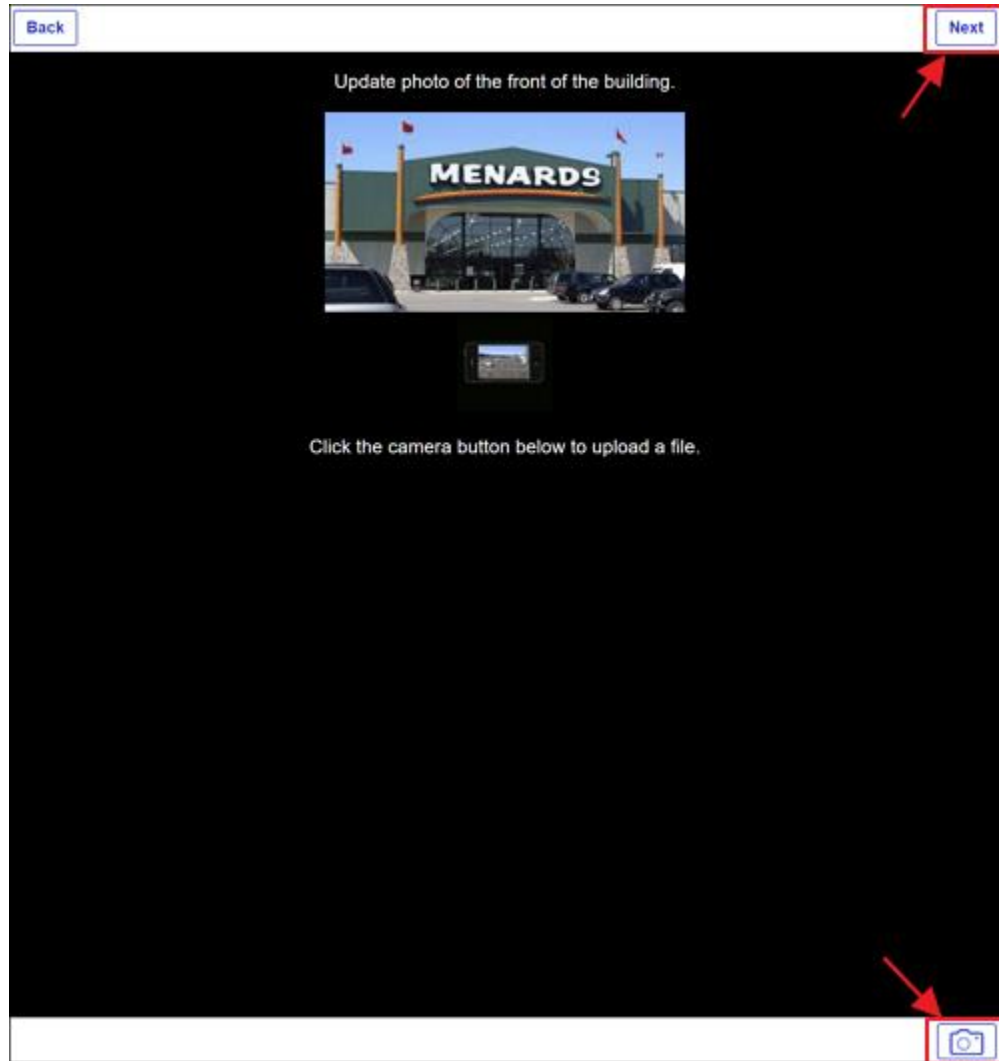
Confirm the aerial image. If the aerial image is correct, select the "Next" button. If the aerial image is not correct select "No" and go through the motions of capturing the aerial image.

NOTE: Depending on your permissions, you may not be able to edit an aerial image.



## Step 6


Upload or confirm the front of the building photo. If the photo is correct, select the "Next" button. If the photo is not correct or one does not exist, tap the camera icon located at the bottom right and snap a photo of the front of the building to upload. Make sure your camera is in landscape mode when taking pictures!



## Step 7

Tap on the line item of the section that you are performing the service work in. If there are no sections, you will need to outline the sections by selecting "Add Section".

Back Verify Section



Map Section

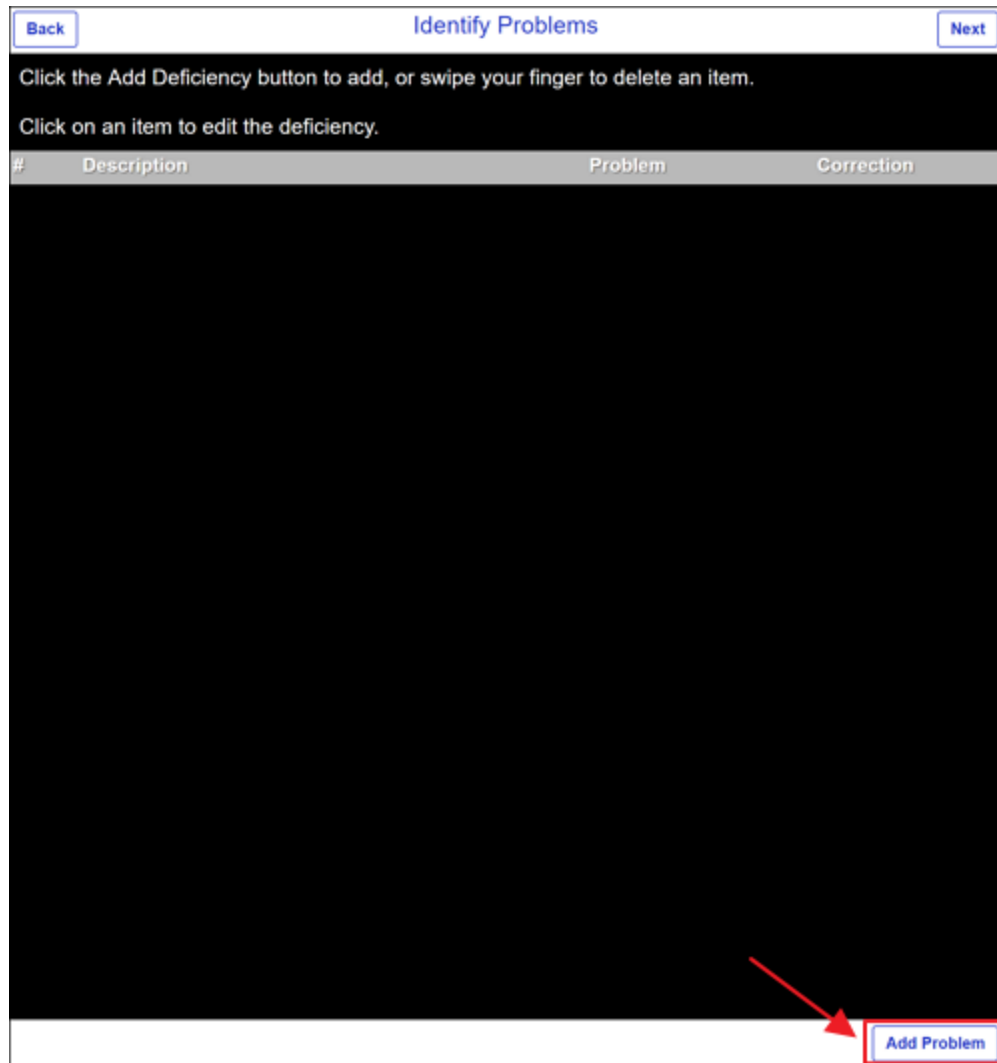
|   |                     |
|---|---------------------|
| 1 | → Main Building/Gym |
| 2 | Offices             |

Add Section

# Capturing Problems

## Step 8

The Identify Problems page is where you will spend the majority of your time. This is where you will take your problem and corrective photos. To add a problem photo select the "Add Problem" button located at the bottom right.



## Step 9

Plot the location(s) of the deficiency by tapping in the middle of the cross-hairs. When you are done, tap on the "next" button.



## Step 10

Select the deficiency type from the drop-down, identify if it is a remedial or emergency repair and quantify how many of this deficiency exists on the roof section. Select the "Next" button to continue.

Back Description Next

Select the problem type from Type list.

Category: General

Type: Punctures - Rips - Tears

Remedial Emergency

Qty: 3 Units: EA

## Step 11


The problem description will pull in from your deficiency library. You can always add additional text to the description if needed. Tap on the camera icon to take a picture of the problem. You may take up to four photos per problem.

[Back](#) **Problem Photo**

Click the camera button to take a picture of the problem. You may take up to four photos per problem.  
Swipe left or right to switch between photos.

Problem Description:

These deficiencies are typically caused by foot traffic, mechanical work, or simply by a waterproofing membrane that is at the end of it's service life and can no longer withstand the weathering and building movement.




## Step 12


You can swipe left or right to switch between photos. Select the "Next" button to continue.

[Back](#) **Problem Photo** [Next](#)

Click the camera button to take a picture of the problem. You may take up to four photos per problem.  
Swipe left or right to switch between photos.



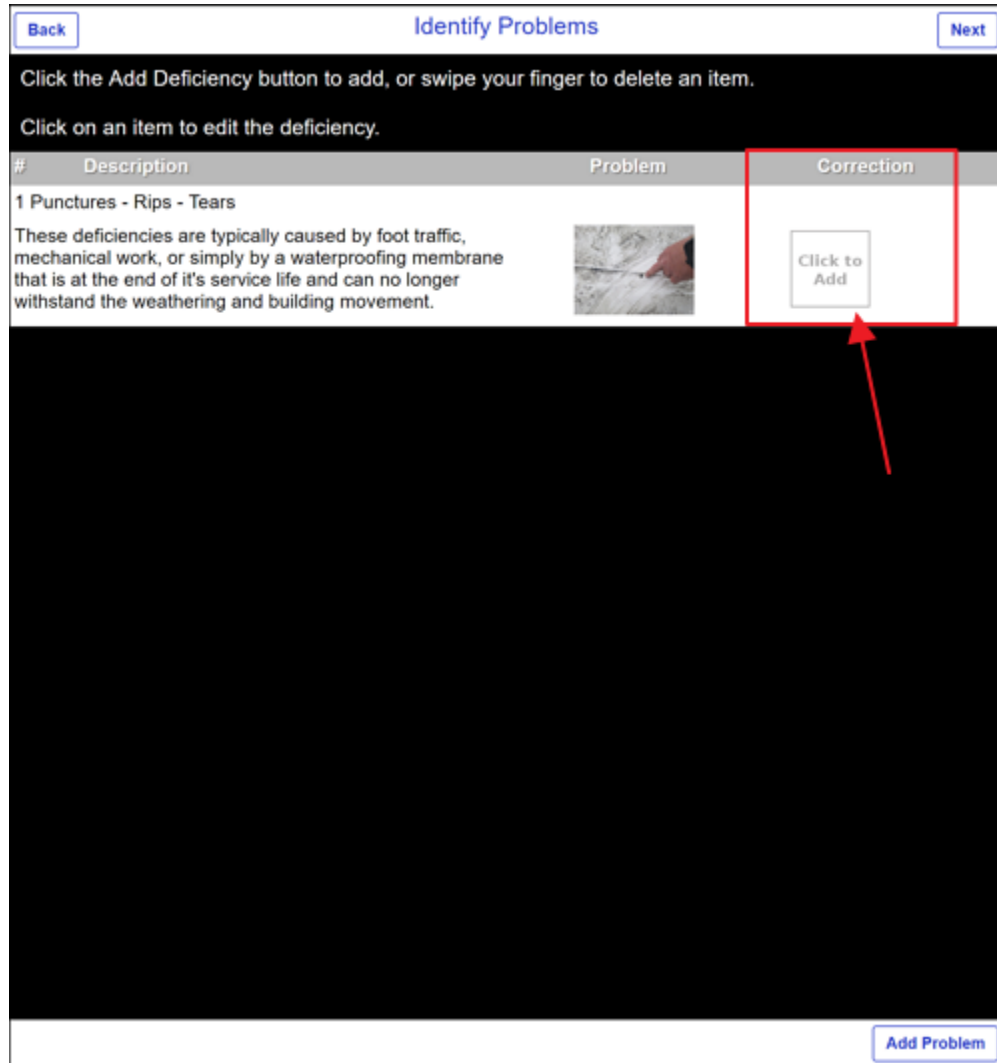
**Problem Description:**  
These deficiencies are typically caused by foot traffic, mechanical work, or simply by a waterproofing membrane that is at the end of its service life and can no longer withstand the weathering and building movement.

[Retake](#) [Delete](#) 

# Capturing Corrections

## Step 13

Now that you've added the problem photos, you can focus on fixing the deficiency. Once you have corrected the deficiency select the "Click To Add" button to take the correction photos.



## Step 14

The problem correction will pull in from your deficiency library. You can always add additional text to the description if needed. Tap on the camera icon to take a picture of the correction. You may take up to four photos per correction.

Back Correction Photo

Click the camera button to take a picture of the correction. You may take up to four photos per correction.  
Swipe left or right to switch between photos.

Problem Correction:

The area surrounding the deficiency must be cleaned. A new piece of waterproofing membrane would be installed and sealed per industry standards.

## Step 15

You can swipe left or right to switch between photos. Select the "Next" button to continue.

[Back](#) Correction Photo [Next](#)

Click the camera button to take a picture of the correction. You may take up to four photos per correction.  
Swipe left or right to switch between photos.



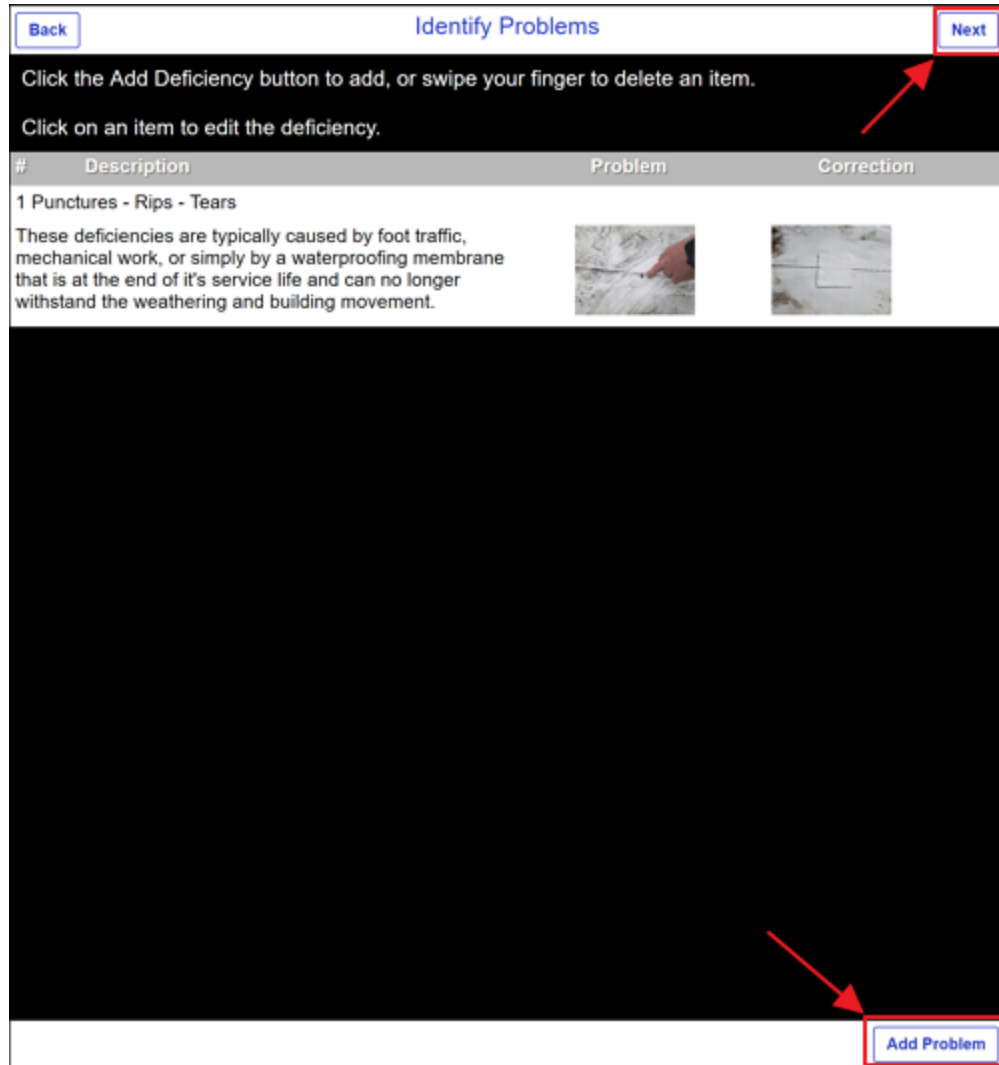
Problem Correction:

The area surrounding the deficiency must be cleaned. A new piece of waterproofing membrane would be installed and sealed per industry standards.

[Retake](#) [Delete](#) 

## Step 16

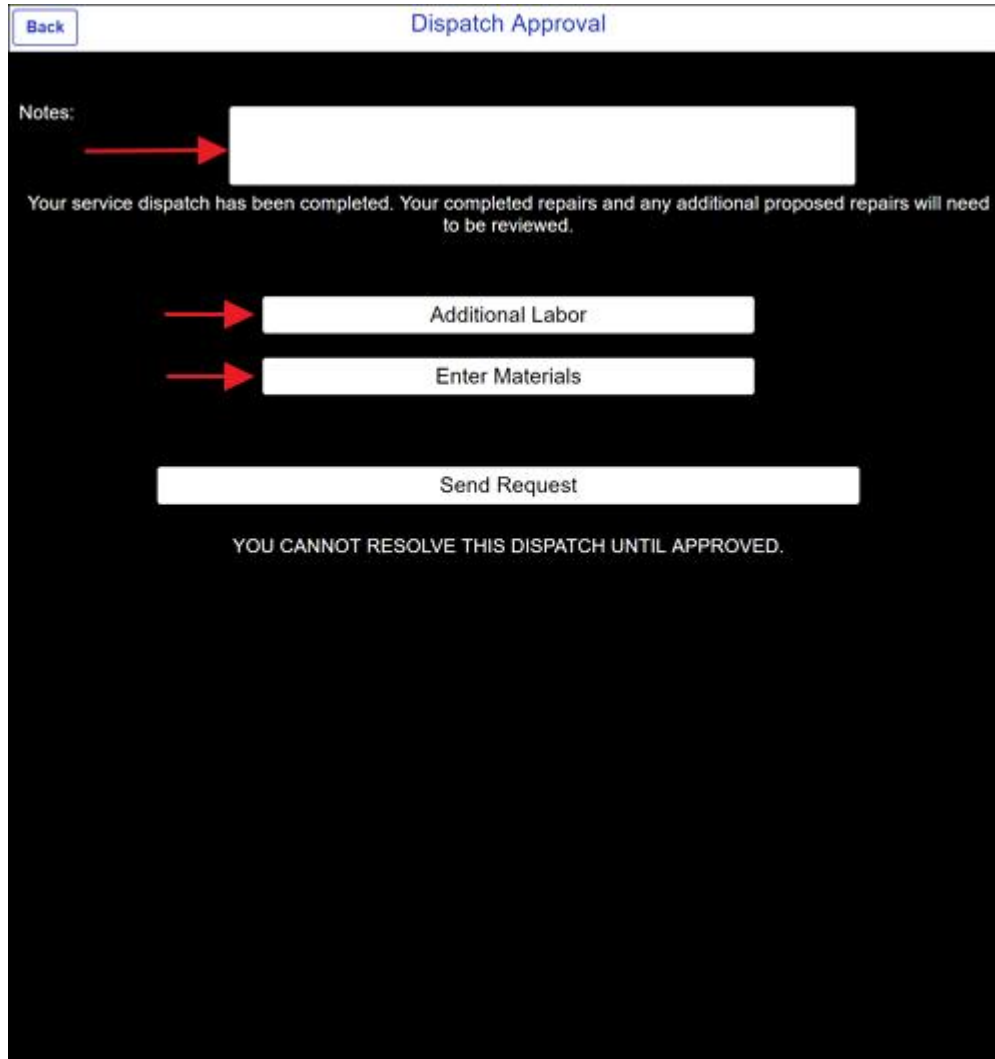
You will be brought back to your Identify Problems page where you can add additional problems by selecting the "Add Problem" button or you can select "Next" if you are done adding problems.



# Adding Notes, Labor and Materials

## Step 17

You are now brought to the Dispatch Approval page. Here you will be able to enter in your notes pertaining to the service ticket. These notes will get relayed back to the office once the service ticket is resolved. You are also able to add additional labor and enter materials used.



The screenshot shows a web interface titled "Dispatch Approval". At the top left is a "Back" button. Below the title, there is a "Notes:" label followed by a large white text input field, with a red arrow pointing to it. Underneath the notes field is a message: "Your service dispatch has been completed. Your completed repairs and any additional proposed repairs will need to be reviewed." Below this message are three white buttons: "Additional Labor", "Enter Materials", and "Send Request". Red arrows point to the "Additional Labor" and "Enter Materials" buttons. At the bottom of the page, a warning message reads: "YOU CANNOT RESOLVE THIS DISPATCH UNTIL APPROVED."

## Step 18

By selecting the "Additional Labor" button shown in Step 17, you are able to add your helper's time.

To duplicate your punch in and punch out times so your helper's time matches yours, select the helper's name next to "Duplicate time to:" and select "Add".

The screenshot shows a web interface titled "Additional Labor". At the top left is a "Back" button. The main area is divided into two sections. The top section contains a "Duplicate time to:" label with a dropdown menu showing names: "Anjani Jonker", "Anjani Jonker", "Justin Kasprzyk", "Kurt Smith", and "Zach Carpenter". A red box highlights the "Add" button next to the first "Anjani Jonker" entry. A red arrow points to "Kurt Smith" in the dropdown. To the right of the dropdown is a "-- OR --" separator. Below the dropdown is a "Travel" button and another "Add" button. The bottom section of the interface shows the text "Anjani Jonker (Labor) 0hrs" and "Still on clock, Punched In: 03-05-2019 02:55 PM".

To manually add your helper's time, add in the number of hours for travel, select their name from the drop-down then select "Add". To add labor, select "Labor" from the drop-down instead of travel, the technician's name from the drop-down, and select "Add".

Back Additional Labor

Duplicate time to: Anjani Jonkei Add

-- OR --

Add Hrs. 1

Travel Zach Carpenter Add

Travel

Labor (Labor) 0hrs

Still on clock, Punched In: 03-05-2019 02:55 PM

## Step 19

You will see your helper's time appears listed right below yours. Select the "Back" button to go back to the previous screen.

The screenshot shows a web interface titled "Additional Labor". At the top left, there is a "Back" button highlighted with a red box. Below the title, there are two sections for adding labor. The first section has a "Duplicate time to:" label, a text input containing "Kurt Smith", and an "Add" button. Below this is a "-- OR --" separator. The second section has an "Add Hrs." label, a text input containing "0,00", a "Travel" button, a text input containing "Zach Carpente", and an "Add" button. Below these sections is a list of labor entries. Each entry consists of a name, "(Labor) 0hrs", and "Still on clock, Punched In: 02-19-2019 04:59 PM". The first two entries are for "Anjani Jonker". The next two entries are for "Kurt Smith". Red arrows point to the "Kurt Smith" entries, and red "[delete]" links are visible to the right of each entry.

| Name          | Hours | Status  | Action   |
|---------------|-------|---|----------|
| Anjani Jonker | 0hrs  | Still on clock, Punched In: 02-19-2019 04:59 PM |          |
| Anjani Jonker | 0hrs  | Still on clock, Punched In: 02-19-2019 04:59 PM | [delete] |
| Kurt Smith    | 0hrs  | Still on clock, Punched In: 02-19-2019 04:59 PM | [delete] |
| Kurt Smith    | 0hrs  | Still on clock, Punched In: 02-19-2019 04:59 PM | [delete] |

## Step 20

Select the "Enter Materials" button to enter in materials used during this service ticket.

The screenshot shows a software interface titled "Dispatch Approval". At the top left is a "Back" button. Below the title, there is a "Notes:" section with a text box containing the text: "we fixed all of the emergency deficiencies that were causing a leak. we also fixed the remedial deficiencies to pro-long the life of the roof." Below the notes, a message states: "Your service dispatch has been completed. Your completed repairs and any additional proposed repairs will need to be reviewed." There are three buttons stacked vertically: "Additional Labor", "Enter Materials", and "Send Request". A red arrow points to the "Enter Materials" button. At the bottom of the screen, a message reads: "YOU CANNOT RESOLVE THIS DISPATCH UNTIL APPROVED."

## Step 21

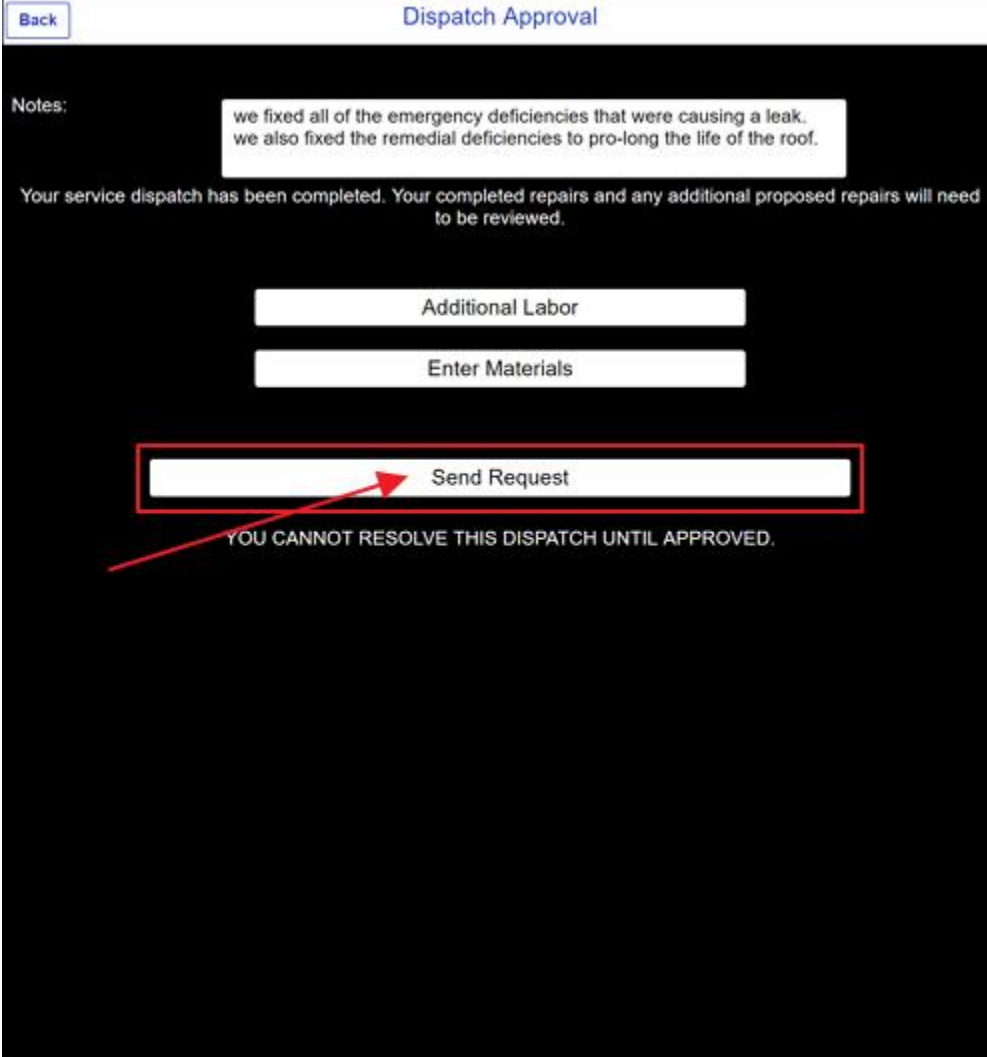
Enter in the quantity of the material, select the category and the material from the drop-down and then select "Add Mats" to add the material to the list. Once you are done adding your materials select the "Back Button".

The screenshot displays the 'Materials List' application interface. At the top, there is a 'Back' button and the title 'Materials List'. Below the title, the label 'Qty.' is positioned above a text input field containing the number '3', followed by a unit selector dropdown menu currently set to 'Ea'. To the right of the quantity field are two more dropdown menus: the first is set to 'All' and the second is set to 'Caulk'. Below these input fields, the text 'Caulk 2.00 Ea' is visible, with a small red square icon to its right. At the bottom right of the interface, there is a blue 'Add Mats' button, which is highlighted with a red arrow.

## Step 22

Now that you have entered in your service dispatch notes, additional labor and materials, select the "Send Request" button to move to the next step.

NOTE: Depending on your account settings you may have to wait for approval from the office to move to the next step. The page will refresh on its own once it has been approved.



Back

### Dispatch Approval

Notes:

we fixed all of the emergency deficiencies that were causing a leak.  
we also fixed the remedial deficiencies to pro-long the life of the roof.

Your service dispatch has been completed. Your completed repairs and any additional proposed repairs will need to be reviewed.

Additional Labor

Enter Materials

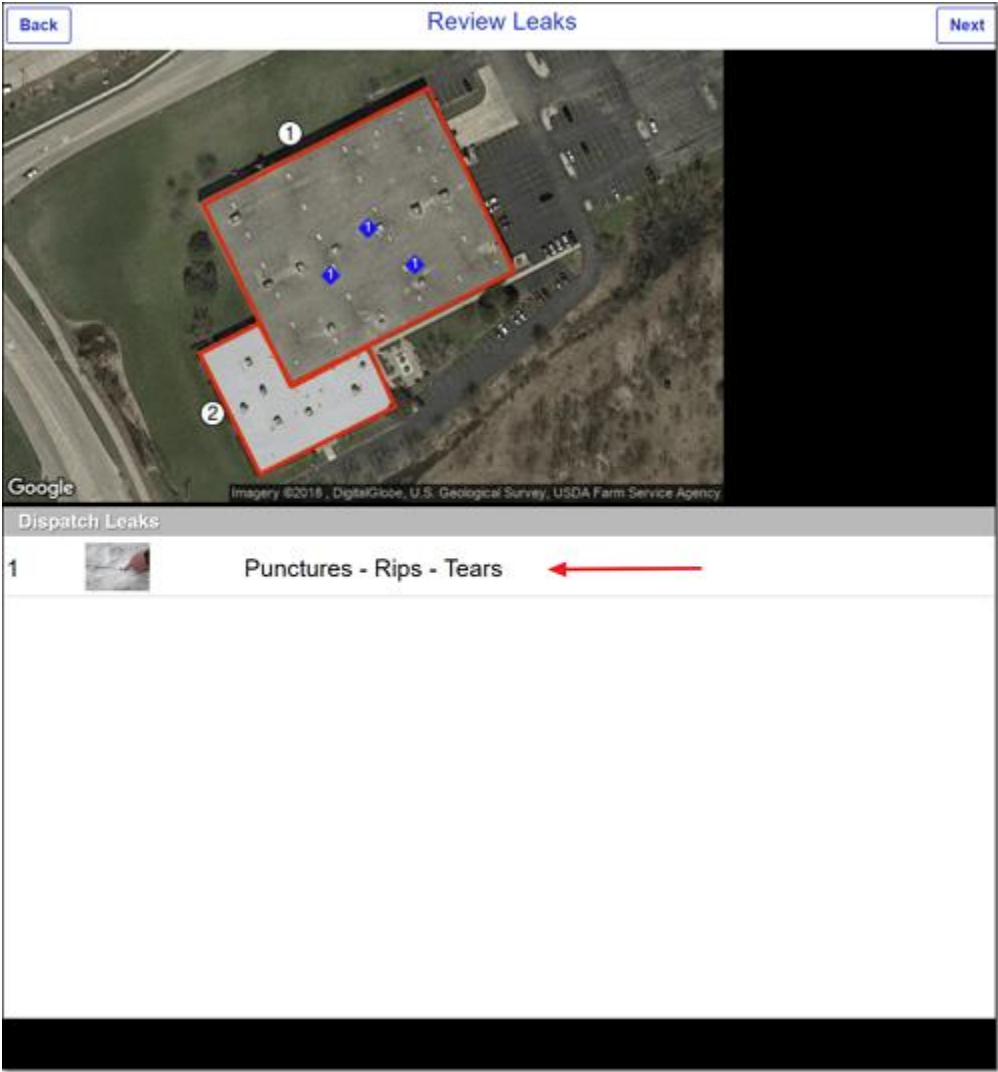
Send Request

YOU CANNOT RESOLVE THIS DISPATCH UNTIL APPROVED.

# Reviewing the Service Ticket with Your Customer

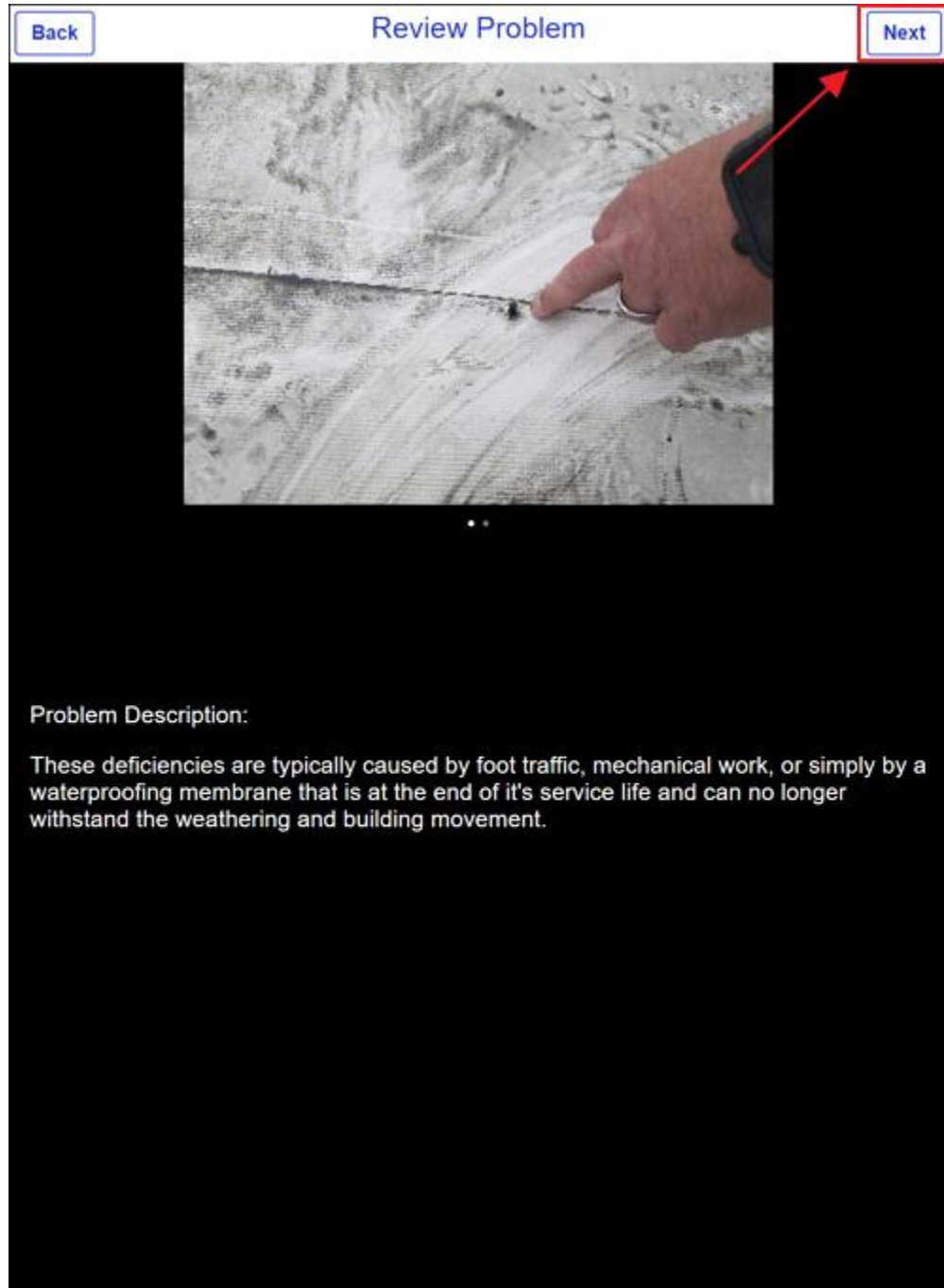
## Step 23

The Review Leaks page is where you can show your customers the problems you found on the roof and how you corrected them. Tap into each deficiency to show them the problem photos and correction photos.



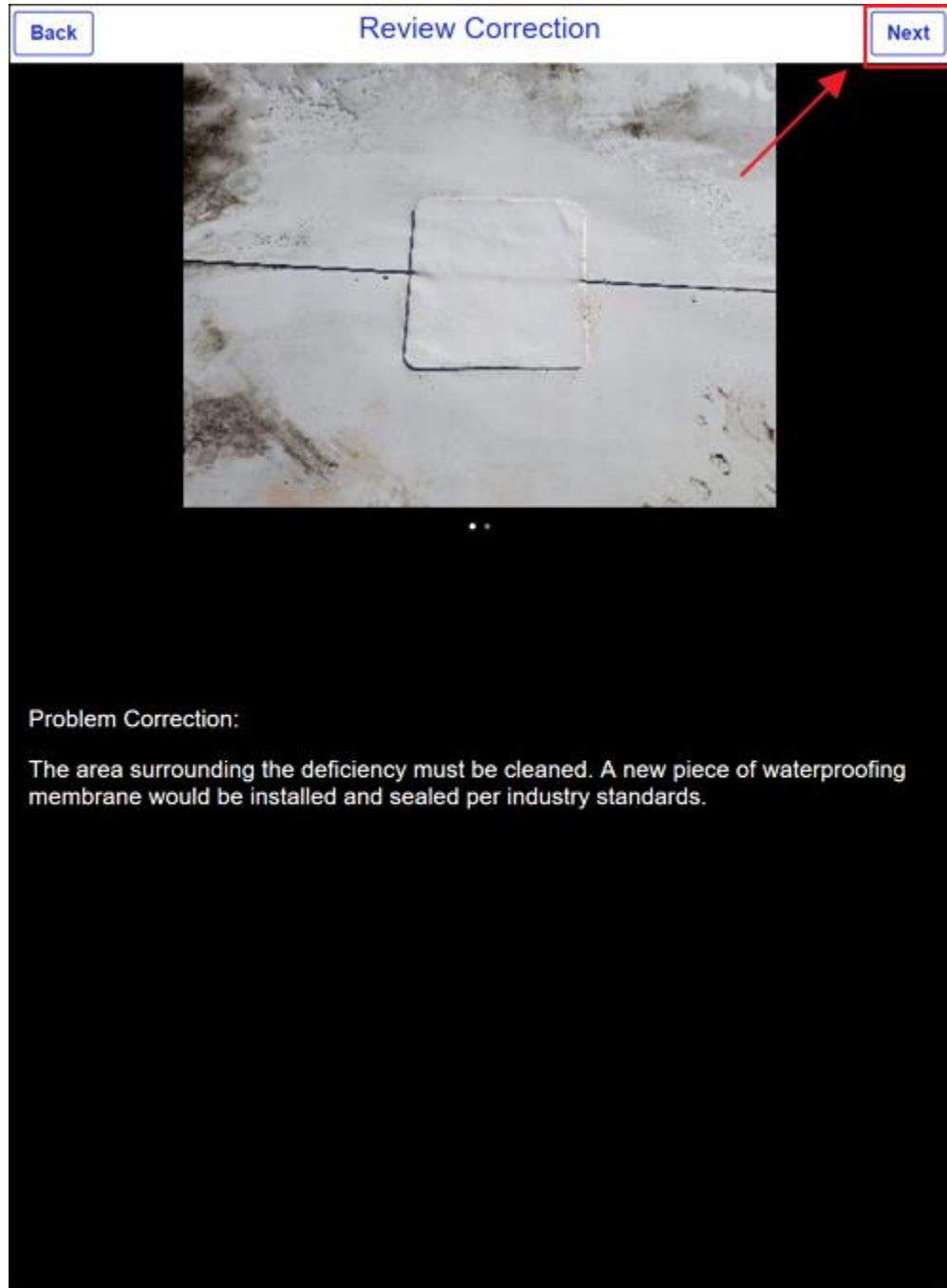
## Step 24

Your customer will be able to see the problem photos and problem description. Simply swipe left or right to switch between photos. Select the "Next" button to show your customer the problem correction photos.



## Step 25

Your customer will be able to see the correction photos and the problem correction description. Swipe left or right to switch between photos. Select the "Next" button to go back to the Review Leaks page.



## Step 26

On the Review Leaks page, you can review the rest of the deficiencies you have captured. Once you are done select the "Next" button.

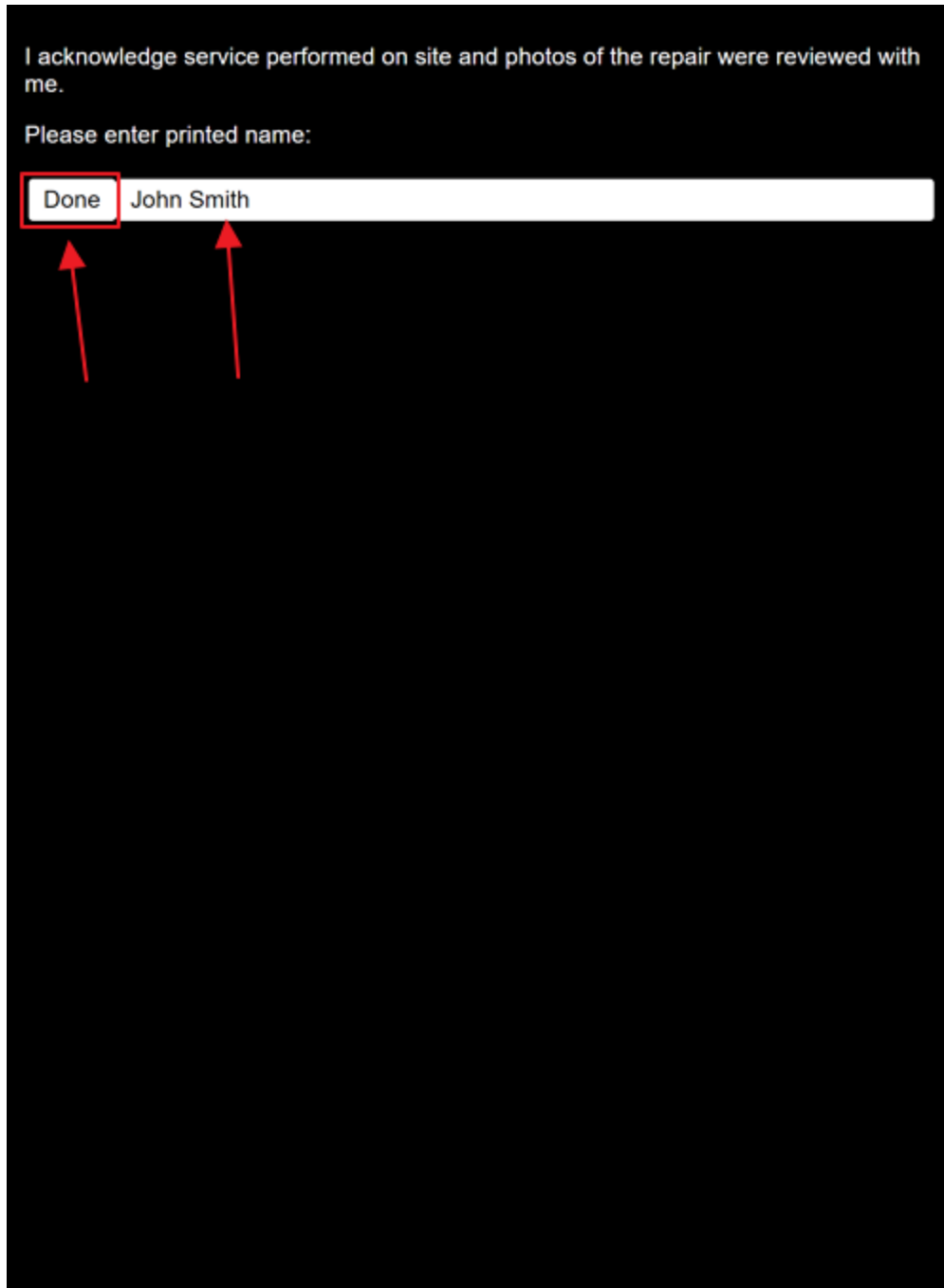


## Step 27

Your customer will enter their name in the text field and select "Done".

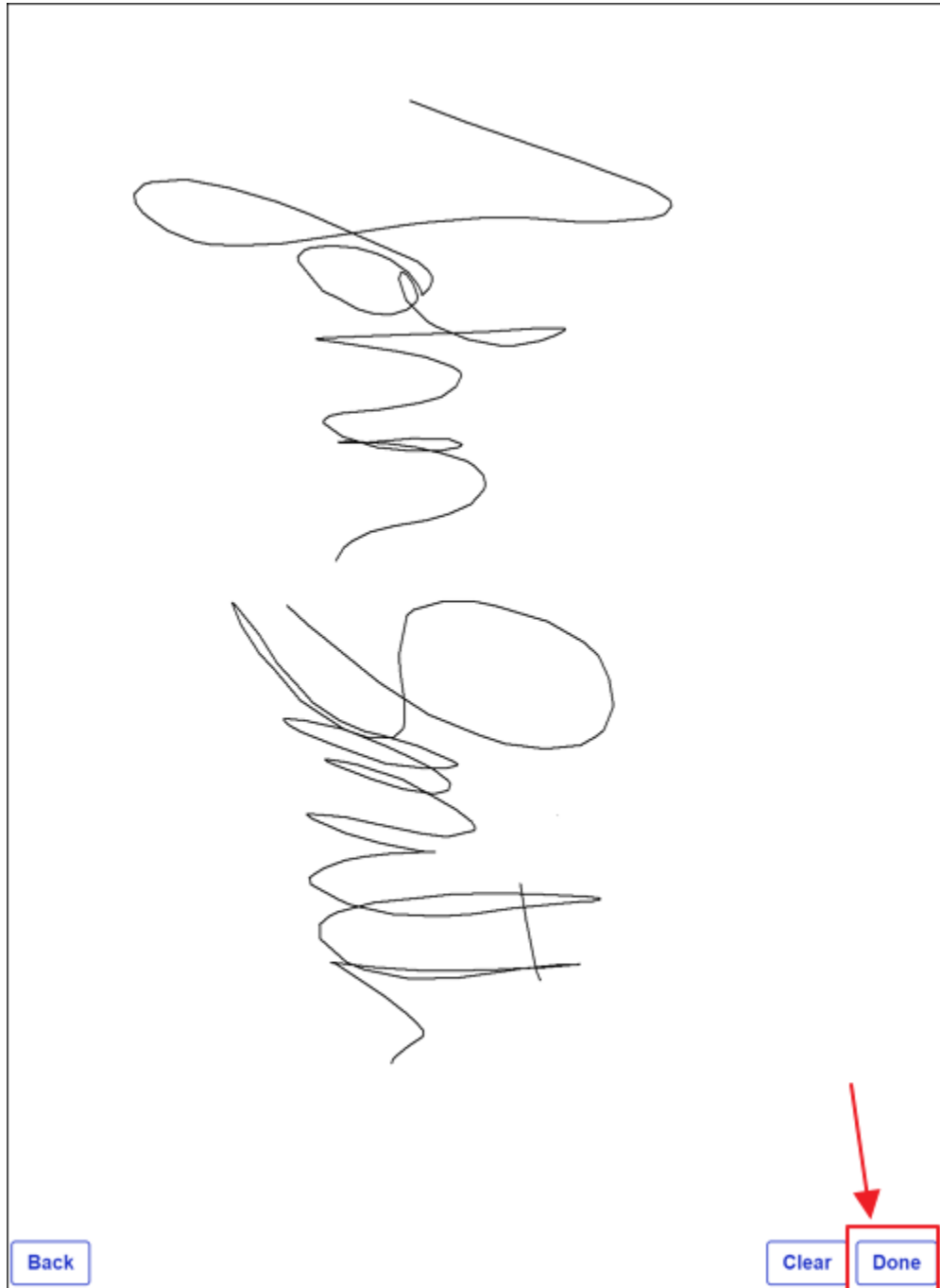
I acknowledge service performed on site and photos of the repair were reviewed with me.

Please enter printed name:

A screenshot of a mobile application interface. The background is black. At the top, there is white text: "I acknowledge service performed on site and photos of the repair were reviewed with me." Below this is another line of white text: "Please enter printed name:". Underneath is a white horizontal bar containing a "Done" button on the left and a text field on the right. The text field contains the text "John Smith". Two red arrows point upwards from below the "Done" button and the text field.

## Step 28

Your customer will then sign off on the service invoice using their finger or stylist pen and select "Done".



# Step 29

You have the option to email the supporting documents to your customer. Simply enter their email address (you can only send to one email) and any comments then select "Email". If you do not wish to email a copy of the supporting documents select the "Skip" button.

Now you have the option to email this report.

Email report to:

Comments:

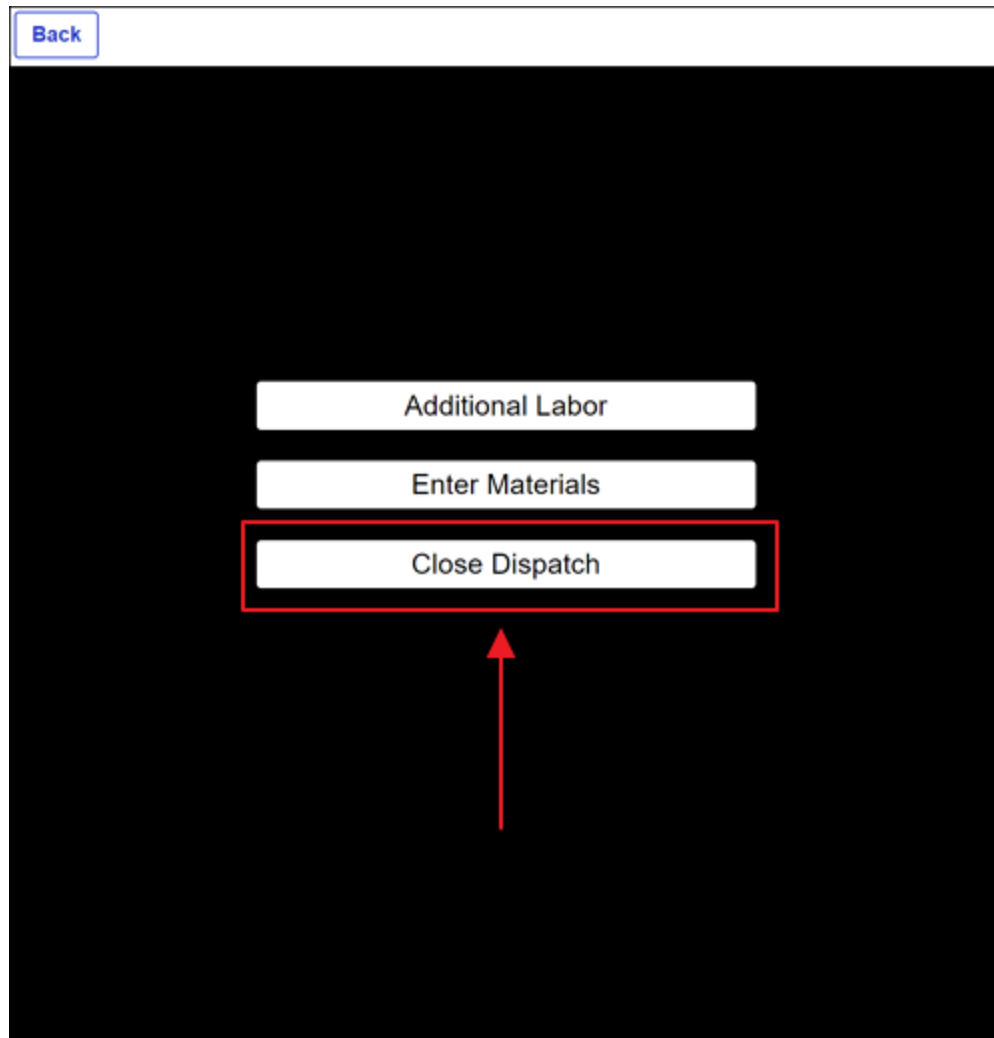
Skip

Email

# Closing the Service Ticket

## Step 30

You have one last chance to add additional labor and/or materials. If you are complete with your service dispatch, select the "Close Dispatch" button which will punch you out of the job and bring you back to your schedule to move to the next ticket.



**Congratulations! You have successfully completed a Service Dispatch Ticket!**