



## mpengo ServiceCall 4.3: A Quick-Start Guide

Welcome to mpengo ServiceCall! You'll enjoy using the app to replace all the paper documents that you used to fill out in the field. We strongly suggest that you just play around with the sample delivered with the app, tapping all over the screen, and trying out features. When you are ready to go (after having adjusted your Settings), just tap Open Calls/Add New Call to start your first ServiceCall / Work Order.

ServiceCall replicates a typical work order form or call sheet, and lets you indicate the service request, work performed, charges for time and materials used. You can also calculate the taxes and final invoice, get customer signature of the job done, and receive and acknowledge payment. Various reports let you produce invoice registers, invoice copies, timesheets, open calls, and truck re-stocking suggestions. There is also a Service Scheduler to setup your recurring calls. AND, there's also a tool to integrate with a web-based Dispatch Board so your office can send and update new calls to your iPad automatically.

### Support:

We're here to help any time you need us. We're consistently rated among the top support organizations in North America and if you ask us a question, you'll find out why. You can expect a quick reply.

To reach us, simply tap the button labeled **[Support]**. Enter your subject & question, tap **[Send]**, and our Support folks will answer you quickly.

Also when you tap the Support button you will see a button for **Tutorials**. Tap this for a brief review of how to **Create/Import Customers and Rates/Prices**. For a more detailed Guide/Tutorial send Support an email requesting the Quick Start Guide.

### App Buttons:

Generally, the app uses the following conventions:

**[Back]** - returns to the previous screen or menu, and does not save any data entered.

**[Done]** - saves your work and returns you to the previous screen.

**[+]** icon - tap to add a new record, line, or other piece of information.



**[Trashcan]** icon - tap to delete a record.



**[Envelope]** icon - tap to Email.

Tapping outside the window - works the same as the **[Back]** button. Remember that your work is **not** saved when you do this.

# mpengo ServiceCall Home Screen

**Tap for Open Calls/ Add New Calls**      **Map Location**      **Service Scheduler**      **Tap to contact Support or view Tutorials**

Open Calls/Add New Call
mpengo ServiceCall 4.0.10
Schedule 1 Support

**Your Company Info and Logo** →



M. L. Stewart  
Box 325  
West Palm Beach, FL 33401  
(888) 555-1212 Tel  
support@mpengo.com

LICENSE: T-1234567

**Select or Change Customer. Look at Notes & History** →

**CUSTOMER**

Mary  
(855) 840-3064  
(416) 840-3064  
info@mpengo.com

1598 Queensville Side Road  
PO Box 214  
Queensville, ON Canada L0G 1R0 Map

QTY	DESCRIPTION OF CHARGES	RATE	TOTAL
1.00	Heat Pump Switch	50.00	50.00
1.00	Basic Call Charge	75.00	75.00

**Tap to enter charges** →

Date Mar 03 2018 Invoice ML-80154 1

Tech Barney CHARGEABLE

OPEN Order# / Name

A/C not working SERVICE REQUESTED

Time Requested 12:00pm

**To Do** 0 WORK PERFORMED / RECOMMENDATIONS

Replaced heat pump switch  
Reset Thermostat

(not signed) Date Completed Mar 04 2018

DISCOUNT & PAYMENT		INVOICE	
Thank you for this opportunity to serve you. Please call us for your next service need.		Materials	50.00
Amount Paid 0.00		Labor	75.00
		Consumables	0.00
		Travel	0.00
		Other	0.00
		Tax1	7.50
		<b>TOTAL INVOICE</b>	<b>132.50</b>

I have the authority to order the work as outlined above. It is agreed that the seller will retain title to any equipment or material that may be furnished until final payment is made, and if settlement is not made as agreed, the seller shall have the right to remove same and the seller will be held harmless for any damages resulting from the removal thereof.

**Customer Signature** →



Mar 04 2018 12:27 PM

Settings Customers Rates Reports Tools Email Photo ServiceSheet Close

**Enter Customers** ↗

**Enter Rates / Reports Prices** ↗

**Tap for Rates / Reports** ↗

**Sync, Backup, Import/Export Info Interface with Dispatch** ↗

**Email / Print Invoice** ↗

**Add Photos** ↗

**Shared Apps Configuration** ↗

**Close the Call, Create Follow up Call** ↗

**Tap for Date, Service At Location, Tech, Order No./Name, How did you find out about us? Call Status, Type of Call, and Cancel call.** ←

**Enter Service & Time Requested** ←

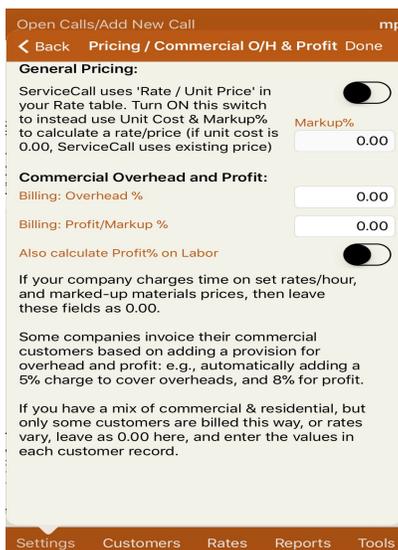
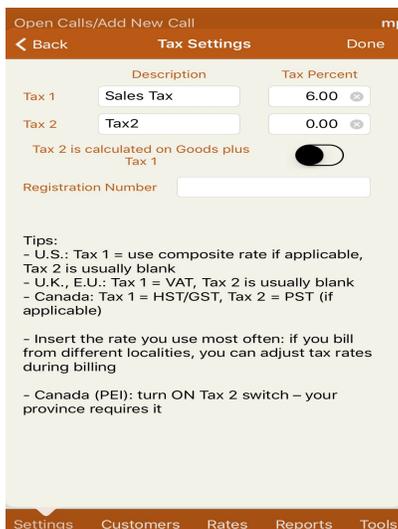
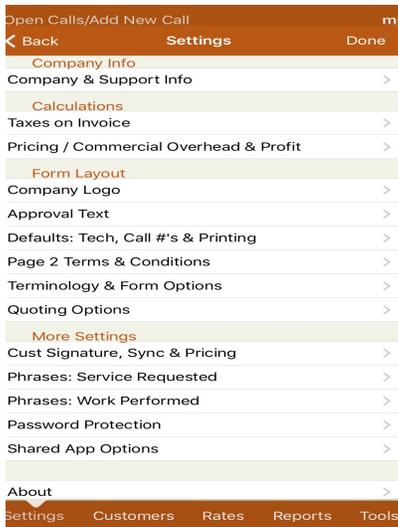
**Create and check off your TO DO List** →

**Enter Work Performed, Times in/out, Date Complete, Tech Signature, Customer Installed Info** ←

**Tap for Invoice Summary and special tax rate function** ←

**Tap to Enter Discount and Payment** →

## Settings Screen:



This screen is to setup the background information of your company and customize the app for you and your customers.

**Company & Support Info:** Enter your company name, address, and contact info to put on the call sheet, including your license or registration number (this description can be changed in Terminology & Form Options). For mpengo support, enter your contact name, email and general location so that we are able to help you if you have a Support question. When you contact us, we'll also add you to the notification list for future updates and tips. We will never share your address with anyone.

**Taxes on Invoice:** lets you include a tax calculation on your invoice. For example, if you are in the UK, set the description of Tax 1 to VAT and the tax percentage to the appropriate value. Or, if you are in a state that has State as well as County taxes, you can set both taxes.

- **Tax 2 is calculated on Goods plus Tax 1:** Turn switch **ON** if your province requires it. **NOTE:** if you have a different tax rate for a customer the default tax rates can be overridden in the Invoice section of the ServiceCall. **Note:** You also have the option to override the Default Tax Rules for a call by tapping the Invoice Section of the call. Then tap **'Special Tax Rate'** and follow the instructions.
- **Registration Number:** You may enter your Tax number or Registration number, which will appear on the ServiceCall Invoices in the Invoice Section. **NOTE:** The number will show only when the call is emailed or printed.

### **Pricing / Commercial Overhead & Profit:**

**General Pricing:** ServiceCall uses 'Rate/Unit Price' in your Rate Table. Turn ON the switch to instead use Unit Cost & Markup % to calculate a rate/price (if unit cost is 0.00, ServiceCall uses existing price).

\*Please note that when you press **Done** to save your markup selection you will be asked if you wish to apply this to 'All Current (open) Calls' or 'No, just all future work'.

\*If Markup is turned **ON** then you will also see an option in the Customer File to enter a 'Cost markup (if different)' than the Markup entered here.

**Commercial Overhead & Profit:** some service firms who specialize exclusively on commercial contracts sometimes establish pre-set rates. Overhead is calculated on all items including labor. Profit will NOT charge on Labor (items in Labor Category) unless the flag is turned on.

**Company Logo:** will let you attach an image to the top of your Call Sheet. Just follow the instructions.

**Approval Text:** comes preset with default descriptions that can be tailored to suit your company requirements.

### Defaults: Tech, Call #s & Printing

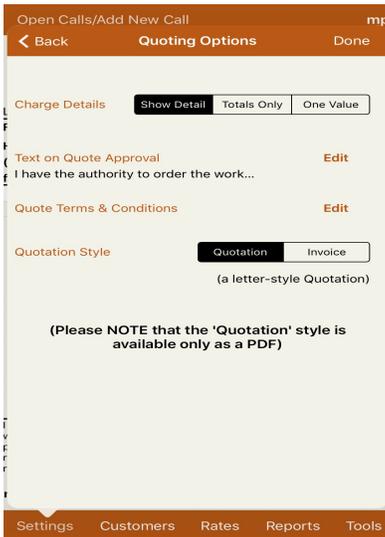
- **Service Call Range:** if you have more than one iPad using Service Call, you should establish a call number series (e.g. 10001-39999, 40000-69999 etc.) for each iPad to better help identify calls back at the office, and to avoid conflict when data from several iPad's is merged.
- **Optional Prefix:** helps segregate calls from several iPad's with a prefix letter such as TJ for TJ Dawe's iPad or RL for Rob Little's iPad. The Service Call numbers would then appear as TJ-01002 or RL-04005.
- **Name of Tech:** To make it faster to create a new call, enter the person that uses this iPad (you?).
- **Calendar Type:** Select Wheel or Calendar.

- **Questions to ask about items that were serviced:** Allows you to update information on the equipment being serviced for warranty and customer records. **(The default questions here can be changed to suit your needs).**
- **'Print Call' Format:** choose PDF or HTML for your service invoice format. It's also the default setting in Reports.
- **'Print Call' Color:** choose a color for your service invoice format.

**Page 2 Terms & Conditions:** Use this space if you wish to append a 2<sup>nd</sup> page of Terms and Conditions for your call. (Layout of the final printed form may require adjustments in spacing).

### Terminology & Form Options:

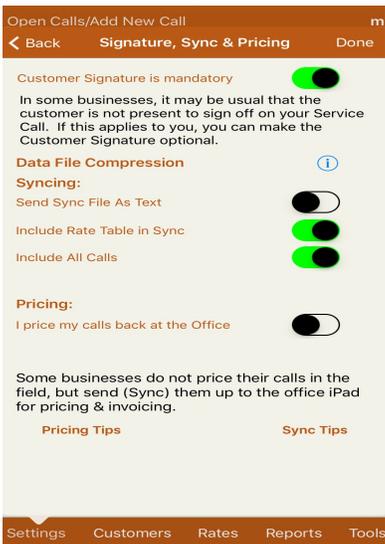
- **License or Reg #:** Option to change the wording of 'License'
- **Service Call #:** Option to change the wording for 'Service Call #'
- **Price/Rate Categories and Short Form:** allows you to change the names of the 5 Price/Rate Categories.
- **SvcCall Form Options:** choose whether or not you want to have times in/out, customer signature or rate price codes included on your form when you print or email. **Note:** if the signature (even if it has been signed by the customer) or times in/out is turned **OFF** it will not be stored in call history. The times in/out will appear on the timesheet report.
- **When emailing a SvcCall, always send a cc to:** if desired, enter an email address to be cc'd on every call emailed.



**Quoting Options:** When you set your Type of Call to 'Quote Only' you have the following options for your emailed Quote:

- **Charge Details:** Select 'Show Details', 'Totals Only' or 'One Value'.
- **Text on Quote Approval (signature area):** If you wish to enter different Approval text for your Quote, tap Edit and enter your text.
- **Quotes Terms & Conditions:** Tap Edit to enter any Terms and Conditions you want to appear on the emailed Quote.
- **Quotation Style:** Select the type of layout for your Quotation. 'Quotation' is a letter style quotation. 'Invoice' looks similar to a ServiceCall Invoice.

## Customer Signature, Sync & Pricing



**Customer Signature:** option to make Customer signature mandatory or optional.

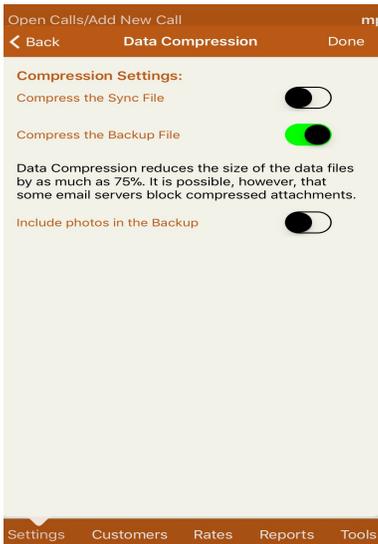
- Turn **ON** to have Customer Signature Mandatory

**Syncing:** Adjusting the Sync settings can reduce the size of sync files being sent and improve speed. (Tap **Sync Tips** for more info).

- **If the regular sync works fine for you, DO NOT change anything.**
- If not, switch to text settings.
- If you encounter problems sending large sync files, the options to compress, to not include rates, and to include recent calls only are available to reduce the file size).

**Default settings for Syncing are:**

- **Send Sync File as Text – OFF:** Turn **ON** to create text files – bigger, but less subject to problems.
- **Include Rate Table in Sync – ON:** Unless your rate table changes often, you might consider excluding the rate table from the sync (especially if it's a large table).
- **Include All Calls – ON:** Indicate No (OFF) to declare that you only need to sync the newest calls from (e.g.) the last 10 days.



**Data File Compression:** (tap the Information button to access settings): Data Compression reduces the size of the data files by as much as 75%. It is possible, however, that some email servers block compressed attachments.

**IMPORTANT NOTE:** The default settings work just fine for 90% of our users. Change **ONLY** if your iPad is having difficulty merging sync file from another iPad.

**Default settings for Data Compression are:**

- **Compress the Sync File OFF**
- **Compress the Backup File ON**
- **Include Photos in Backup OFF**

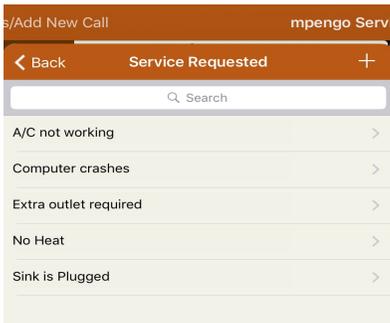
**Pricing:** some businesses do not price their calls in the field, but send (Sync) them up to the office iPad for pricing and invoicing. Tap **PRICING TIPS** for more information.

**How sync and Pricing works:**

- **Field units** get their calls priced at zero (when the flag is turned **ON** for 'I price my calls back at the Office' the field units prices are automatically changed to zero).
- When you close them, they are tagged as 'transferred'.
- You sync them up to the **Office iPad** (which has the flag turned **ON** for 'I price my calls back at the Office', and 'I am the Office').
- When the Office iPad merges them, the transferred calls are reset as regular 'open' calls for you to adjust.
- Then the Office iPad has the option to correct the pricing all at once, or fix each item manually.
- Office completes them and closes them in the regular way.
- When you sync them back to the field, the field units (which had the invoices as all zeroes, and saying transferred), now get their call history records replaced and the status changed to closed. The Invoice will still show zeroes for prices on the Tech's iPad.

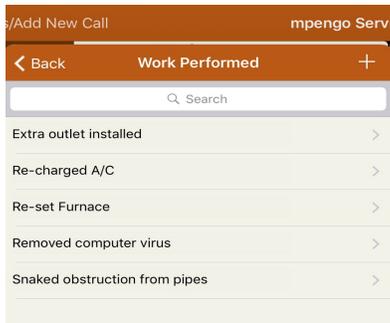
**NOTE:** in 'office pricing', once the information is synced to the Office iPad, all of the main reports (e.g. Invoice Register/Invoice Copies, Business summary, Timesheet summary) would be printed on the Office iPad. The Suggested Parts Stocking report will always be a list of companywide parts used.

**Phrases: Service Requested:** lets you enter standard phrases on service requested. This will allow the Tech to optionally choose one or more of these when doing a call to save time.



- Tap + to add a new Service Requested Phrase or tap an existing line to edit. Tap **Done** to save it.

**Phrases: Work Performed:** lets you enter standard phrases on work performed. This will allow the Tech to optionally choose one or more of these when doing a call to save time.



- Tap + to add a new Work Performed Phrase or tap an existing line to edit. Tap **Done** to save it.

### **Password Protection:**



The Password controls the use of Tools for exporting Customer Lists, Rates/Price Tables or running these Reports. Once set, it is no longer visible, and cannot be edited. As a service, you can email it to [passwords@mpengo.com](mailto:passwords@mpengo.com) and let us store the password for you. Then, if you forget, we will divulge the password to you PROVIDED that your request comes from the SAME email address that sent us the code.

**Shared App Options:** The latest versions of mpengo Service Call and mpengo Service Sheet now include the ability to share information between the apps without the need for an Internet connection. The only requirement is that both apps must be installed on the same device.

Once the apps have been installed on the same device and started for the first time, the customers and rates can be exported between the apps. A new service sheet can be created for an existing call, and you can easily switch between each of the apps.

When using the new option on the Actions menu in either app to export data from one app to the other, the second app will automatically load and display the import summary information for the selected export.



**Registered Apps:** Displays the apps you have available to use for the Shared Sandbox and the Optional Prefix (if you have set one up) for the call #s in each app.

**Service Sheet Options:**

- **Layouts:** One or more Layouts will be presented as a list for the user to select when requesting a new service sheet from the other apps sharing the sandbox. Tap in the box to view the layout or layouts that have been set up for use in the Service Sheet App. If there is more than one in the list you can tap on the Layout name you want to set as default and it will put a check mark next to the layout. **NOTE:** The layouts are managed in Service Sheet and if any changes are made to this list in Service Sheet the default layout must be re-selected.
- **Tech:** Displays the name of the Tech to use as the default when creating a new service sheet from the other apps sharing the sandbox.

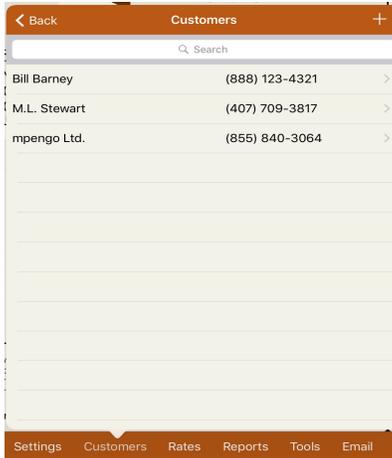
- **Disable Invoicing for sheets associated with a call:** Turn ON to disable invoicing for any service sheet associated with a Service Call.

**Service Call Options:**

- **Email Service Sheet PDF when sending email for Service Call:** Turn ON to email the service sheet when sending email for Service Call. Once you tap the email/print button in Service Call and send the email you will then be automatically switched over to the Service Sheet app where the email screen will pop up for you to send the sheet. **NOTE:** The customer will receive 2 separate emails, one from Service Call and one from Service Sheet.
- **Use Current Date/Time:** Turn ON if you wish to use the current date and time as default when creating a service sheet from the other apps sharing the sandbox.

**\*\* Please refer to the manual for 'Using Service Call and Service Sheet' on page 17 for further instructions**

## Customers: Tap Customers to setup or edit your Customer list.



When creating a new customer, tap [+]: you can then tap Contact to bring in a name from your iPad Contacts or create a new one yourself here. You can also declare that customer **Tax Exempt**, add **Overhead or Profit**, add **Customer Notes**, and view previous **Call History**.

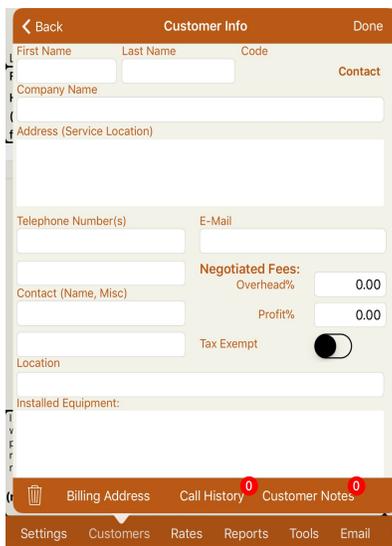
- Please note that if you have chosen to use 'Markup %' in Settings the Overhead or Profit in the Customer file will be replaced with 'Cost Markup (if different)'.

Cost Markup (if different):

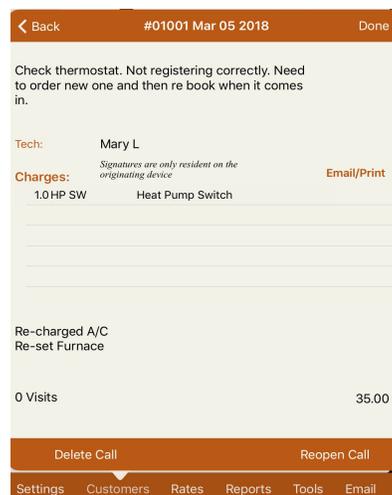
Markup%

*An explanation on how you can create your Customer list on your PC in an Excel spreadsheet and import it into Service Call is located in the Tools button (tap the Tools button then 'Import Tables from PC' or select Support button and tap 'Tutorials').*

**Note:** If you do not have a Company Name but just First and Last name in the contact, these will be listed alphabetically at the top of the list. Those customers with a Company Name will be sorted separately and be listed after all those with just first and last names. If you have a Company Name and have a name in the Contact field both will appear on the ServiceCall.

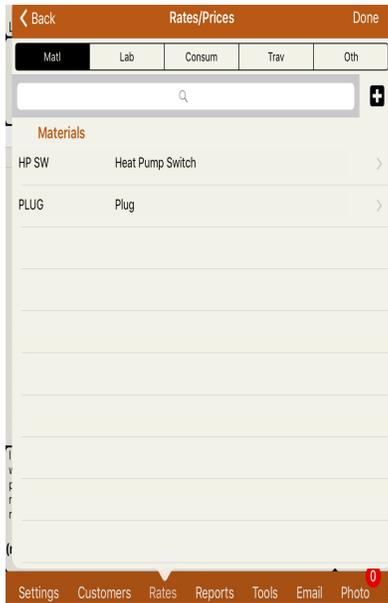


- **Billing Address:** If the Billing Address is different than the Service At Location you can enter the address here. You can also tap on the Contact button to import the address from your Contacts App. **Note:** This address will appear on the ServiceCall Invoice when emailed or printed.
- **Customer Notes:** Tap Customer Notes to access any existing notes for this Customer. To add a new note just tap the + sign, select the date and enter any comments. Remember to tap Done to save your notes.
- **Call History:** When in the Customer Info Screen, you can select Call History to see all closed calls for that specific customer. To view or email/print the call again just tap on it and select Email/Print. **\*\*There is also a Report option in Call history listing all the calls or select a date range. This can be viewed, printed or emailed. If there are any Call History or Notes on file a badge (red circle) will appear showing how many closed calls or notes are on file.**
- **Reopen or Delete a Closed Call:** To reopen or delete a Closed Call go to Call History for that customer and select the call. You will have the option at the bottom of the screen to Delete Call or Reopen Call. Once the call is deleted it cannot be retrieved. When a call is re-opened it is opened on the original date of the call. (**Note:** All reopened or deleted calls will be recorded in the Audit Report in Reports).
- **Email/Print:** Tap this to View, Email or Print a copy or the Invoice.
- **Resend CLOSE to Board:** If the selected call is a **Dispatched Call** you will also see a button to '**Resend Close to Board**'. If for any reason the closed dispatched call did not reach the Board to update its status, you can tap this button to resend the call.



## Rates/Prices: Tap Rates/Prices to manage your parts or pricing tables.

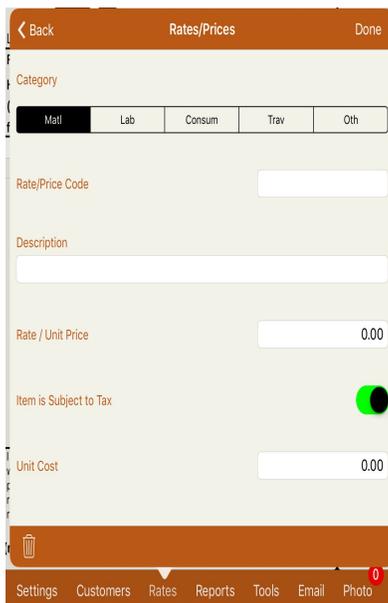
The table is divided into 5 (default) categories: Materials or Parts, Labor, Consumables, Travel, and Misc. An explanation on how you can create your Rates/Price list on your PC in an Excel spreadsheet and import it into Service Call is located in the Tools button (*tap the Tools button then 'Import Tables from PC' or select Support button and tap 'Tutorials'*).



(**Note:** the description or codes for these categories can be changed in Settings-Terminology & Form Options).

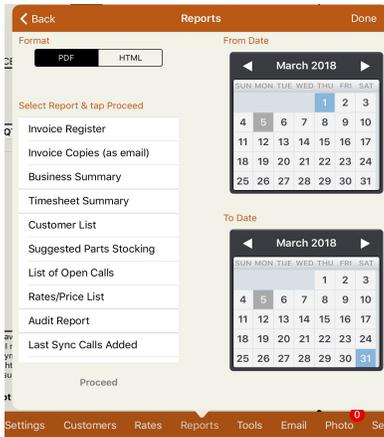
(**Note:** if your company doesn't want their techs to produce invoices in the field, but prefer to price them back at the office – see 'syncing and pricing' pages 13-14). You can also find an explanation on how you can create your Rates/Prices table on your PC in an Excel spreadsheet and import it into Service Call by tapping the Tools button.

## Entering your Rates/Prices:



- Tap the category you are interested in then tap **[+]** to add a new code.
- Indicate a unique Rate/Price code. (The code can be a part number or abbreviation of the description and the parts are sorted by the code).
- Enter a brief description.
- Enter the selling price (Rate/Unit Price).
- Enter the 'Unit Cost'. If you have 'Markup' turned on in settings and have a Unit Cost entered for the item the Cost will be used.
- If 'Item is Subject to Tax' turn flag **ON**.
- Be sure to tap **Done** to save your work.

## Reports:



- Select the format for your report (**PDF or HTML**),
- Select your Report
- Select the date range
- Tap proceed

**Note:** If you have password protection on you will be prompted for the password when selecting the Customer List and Rates/Price List.

**Photos:** You can attach up to 6 photos to your call sheet by tapping the + sign. Then choose photos to pull from your iPad photos or tap camera to take a picture with your iPad. Enter a caption and/or description for this photo. The Caption appears under the picture in the email and the pictures are sorted by caption. Description is for internal use. Any photos taken with the camera in ServiceCall are NOT stored in your photos app. **Note:** these photos are not sent with the sync file.

## Tools:



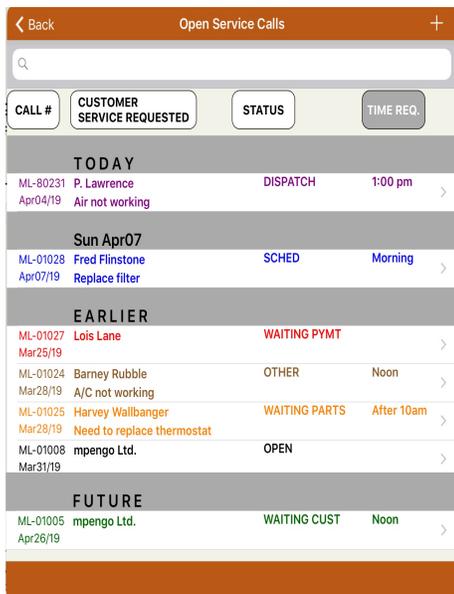
- **Export Data to PC:** You can export a variety of tab-delimited files to your PC.
- **Synchronize iPad's:** Synchronize customer files, notes, call history and rate/price tables with another iPad. **Note:** This does not bring over open calls.
- **Synchronize Settings:** This is useful for setting up a new field iPad to ensure consistency. It will copy your app settings over to another iPad. **Note:** When you import the sync settings to the other iPad you will still need to add the Company Logo. Its also a good idea to just run through all the settings to make sure Tech ID, Call #'s etc. are set up properly for that Tech.
- **Backup and Restore:** This allows you to create a backup of your data, which you can also send to your PC for safekeeping. Anytime you import a sync file or import your rates or customer files, ServiceCall will automatically do a safety backup.

- **Update to Dispatch Board:** Send updated information about the current call back to mpengo Dispatch Board and keep the call open.
- **Interface with Dispatch Board:** here you will find information on Dispatch Board and also the iPad's unique ID to be used in the Service Tech's settings on Dispatch Board.
- **Import Tables from PC:** you can create or update your rates/prices or customer list by importing a tab-delimited file. Tap Explain for instructions.

**\*\*REMEMBER:** once a week or once a month you may wish to send off a backup to your PC and delete all backups in ServiceCall in order to save space on your iPad. The backups are deleted by selecting one and then tapping the trash can or selecting the **Cleanup** function to delete backups before a selected date.

## Processing a Service Call – A quick run-through:

Tap **Open Calls / Add New Call**, and tap **[+]** to start a new ServiceCall.



**Open calls** are grouped by **Date**:

- Today
- Next 7 days shown
- Earlier
- Future (>7 days)

**\*\*** Calls can also be sorted by tapping on the 'Call #', 'Customer Service Requested' or 'Status' box. By tapping on 'Time Req.' you will return to the normal sort.

And the colors are:

- **Black** (open status)
- **Blue** (created by Scheduler)
- **Purple** (created by Dispatch Board)
- **Red** (Call status of Waiting Payment)
- **Orange** (Call status of Waiting Parts)
- **Green** (Call status of Waiting Customer)
- **Brown** (Call status of Other)

- Select your Customer from the list by tapping in the **CUSTOMER** area. If you need to, you can tap **[+]** to add a customer on the fly: once added, select them from the Customer list. If you have an Internet connection, you can tap **Map** to get a map of the client location. (To get back to Service Call after tapping Map, just exit your browser and tap Service Call). Once the customer is selected you can still tap this customer box again to: Look at Notes & History or change the Customer. **Note:** See Page 2 for a screenshot of the home page of a service call and a brief description of each section.
- Tap the **SERVICE REQUESTED** area, and indicate **Time Requested** and description of the problem. If you have created a list of Service Requested items in Settings then just tap the magnifying glass and select the items or manually type in the information.
- By tapping the upper right corner (**Date and ServiceCall # area**) you can add additional info such as service location, technician, order number, how did you find out about us, call status, type of call (or cancel a call).

When you select '**QUOTE ONLY**' as the type of call you will have the option to '**COPY A QUOTE**'. If you select this option it will bring up a list of closed quotes for you to select from. Once selected it will copy all the information and charges from the original Quote. You can then change the customer or add or remove charges.

If this is a '**QUOTE ONLY**' type of call it is not necessary to enter any work to be performed, tech or signature when closing the call.

*\* Please see '**Quoting Options**' in Settings to define your '**Text on Quote Approval**' and '**Quote Terms and Conditions**'. You also have other options such as '**Show Detail**', '**Totals Only**' or '**One Value**' and **Quotation** or **Invoice Style** for your email. (**Note:** Quotation style is only available as a PDF).*

- As you do the work, or at the end, tap the **Charges area** (located below the customer box) and add Charges for Materials, Labor, and so on.
- **TO DO** button in the **WORK PERFORMED/RECOMMENDATIONS AREA** is where you can create a list of tasks and check them off as you go along. If there any To Do items not marked completed a badge (red circle) will appear showing how many items not completed. (This To Do list is not recorded anywhere and is your own personal 'to do' list).
- Tap **WORK PERFORMED/RECOMMENDATIONS** to enter work performed on the call. Manually type this information in or if you have created a list of work performed items in Settings then just tap the magnifying glass and select the items.
- Tap **Times In/Out** to record your times on the Job. Tap + to add your time spent on the job. Enter a description if you like (Customer Visit, etc.) and select time In and time Out. (Note: this is not a Time clock so only enter the times worked on the job).  
Select **Date Completed** and if you wish to keep the Unit Repaired, Model and Serial number in the Customer file, tap **Update Customer Installed** and enter the information. This will also be added in the work performed area. (Don't forget to tap 'Add Info to Cust Button' if you wish to store this info in the customer file). Tap **Tech Signature** to sign off on work completed.
- Tapping on the **INVOICE** box will allow you to view the breakdown of your taxable and non-taxable items and totals before taxes. **Note:** You also have the option to override the Default Tax Rules for this call. Tap '**Special Tax Rate**' and follow the instructions.
- Tap **Photos** if you wish to add up to 6 photos to your ServiceCall. If there are any photos a badge (red circle) will appear showing the number of photos.

**Customer Signature:** Present the iPad to your customer to review, and if everything looks good, have the customer sign off on the work by tapping the bottom left of the display. Tap **Save** to save the signature or **Back** to exit without saving. If Double Tap is on you can also double tap to remove the signature *before* it is saved. Once you have saved the signature it cannot be removed. (If you have trouble with customers accidentally erasing their signature because of the double tap, you have the option to turn off "double tap" when you are in the signature screen. (**Note:** "Double Tap On" is the default). **\*\*You also have the ability to add to existing signatures:** for example, a customer might initial the customer area to declare 'proceed', and then again at the end of the job to acknowledge completion.

- If the customer presents payment, record the payment and type of payment in **DISCOUNT & PAYMENT SCREEN**. To apply a discount, enter the percentage in the Discount Percent % box then tap Done to calculate the amount of the Invoice. Then select Discount & Payment again and record the payment and type of payment. Remember to tap Done to save.
- If this is a '**Quote Only**' type of call the Payment section will say '**Discount Offered**'. Here you can indicate a Discount Percent for the Customer.



**Email/Print** the Service Call, and email a copy to the customer, or if you have an AirPrint compatible wireless printer, tap Print for a hard copy.

**Close:** will close the call and remove it from your open calls list. You are still able to view, print or email this call by going to the Customer Call History.

When you tap, **Close**, you also have the option of creating a Follow up Call. The original call is closed and a new call is created with much of the same info.

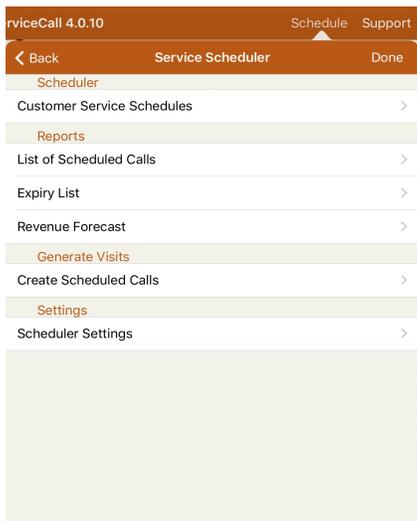
**\*\*If this was a *Dispatched Call* the email screen will pop up when you close the call. The **TO:** field is already populated with the Dispatch Board email address so just tap **SEND** to have the email go to the Dispatch Board and update the status of the call.**

**Tip: To leave a call open and start a new call** just tap Open Calls/Add New Call and tap the + sign. This will leave the existing call open in your Open Calls list and you will be presented with a new service call number and ready to select the customer.

**\*Special Note on 'Quote Only' Type of Call:** If you set the Type of Call to 'QUOTE ONLY' and have forgotten to change the Type of Call before closing, you will be presented with the following message when you tap 'Close the Call'.



- If this is truly still a Quote and you choose 'Close the Quote' then only the call number, customer name, date and service requested will show and say 'Quote Only' in the Invoice Register Report. It will not appear in Timesheet Summary or Parts Suggested Reports. You can view this call in its entirety by going to call history in the Customers file and viewing that call or by selecting Invoice Copies (as email) in Reports. To see a list of Open and Closed Quotes you can also go to Reports and select the List of Quotes Report.



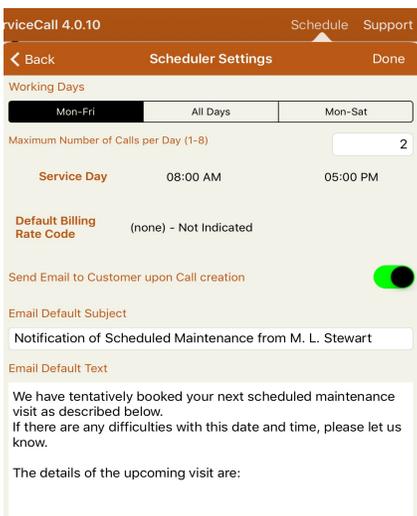
### Service Scheduler:

This feature allows you to set recurring calls. The menu is broken into 4 sections: Scheduler, Reports, Generate Visits and Settings. If you have any upcoming visits in the next 10 days, a badge (red circle) will appear showing how many calls are pending (need to be generated or created) on the 'Service Scheduler' button.

### Scheduler Settings:

Tap the Service Scheduler Button and select 'Scheduler Settings' to configure.

- Set your **Working Days**: Mon-Fri, All Days or Mon-Sat.
- Select **Maximum Number of Calls** per day (1-8)
- **Service Day**: Tap and select the hours for *Service Day Begins* and *Service Day Ends*.
- Enter a **Default Billing Rate Code** if desired. (Set this Rate code up in Rates/Prices).
- You can select the option to **Send Email to Customer upon Call creation**.
- Set your **Email Default Subject** and your **Email Default Text**.
- Tap **DONE** to save your settings.



**Scheduler:** Tap **'Customer Service Schedules'** on the Scheduler menu and tap **+** to add a new schedule:

- **Customer:** Tap to Select the Customer from ServiceCall Customer list
- **First Visit:** Select the month and year for the first visit
- **Preferred Tech:** Enter Tech Name or ID. This will automatically be entered in the ServiceCall.
- **Contract/PO#:** Enter an optional Contract/PO# which will be inserted in the Order No. or Name field in the ServiceCall.
- **# Visits:** Enter # of Visits (1-12)
- **Contract amount:** Enter the total amount of the Contract.
- **Billing Method:** choose Bill separately or Portion on each visit.
- **Billing Code:** If you have not set up the Default billing code in settings you can select one now. If you have chosen a billing method of 'Portion on each visit' and have entered a contract amount and default billing code this will inserted into the charges section of the ServiceCall when created.

**Next tap +** to create your visit

- **Date:** Select the Month and Year of the visit
- **Between Days:** Select the range of days (1-31)
- **Special Notes:** Type in any special notes
- **Repeat** button: if this is the first visited created and you have 2, 3, 4, 6, or 12 visits, you can create the remaining visits in just one step by tapping 'Repeat'.

Tap **DONE** to save the visit.

Now the Visit has been created and if you have selected **'Repeat'** on the previous screen you will see multiple visits displayed.

- Tap **DONE** to save your schedule.
- **RENEW:** allows you to go back into the customers schedule and renew the contract for another year with the same information.

**Generate Visits:** Tap 'Create Scheduled Calls' to create your visits.

Select the Date range for the calls you want to schedule and tap **Select**. The software will attempt to create calls in ServiceCall for each visit that can be scheduled during the date range you picked.

At the end, a report is produced, listing the created calls, and any visits that could not be scheduled (e.g. you wanted to book Jan. 20, but that day was all booked up.)

Created Scheduled Calls							
Date	Time	Call#	Customer	Contract/PO	Service Requested	Special Note	Preferred Tech
Mar 05 2018	Morning	30018	Fred Arnold	1200	Check air		Tim

**Reports:** All reports can be emailed or printed.

Print Done

**Scheduled Calls - Mar 01 2018 - Mar 31 2018**

Date	Call#	Customer	Contract/PO	Service Requested	Special Note	Preferred Tech
Mar 2018 15 - 31	(open)	Barney Rubble		Air inspection		Tim
Mar 05 2018	30018	Fred Arnold	1200	Check air		Tim

Print Done

**Expiry List - Mar 04 2018 - Dec 31 2018**

Customer	Contact	Expires	Amount	Service Requested
Fred Arnold	freda@msn.com (805) 448-2346	Aug 31 2018	100.00	Check air

Print Done

**Revenue Forecast - Mar 04 2018 - Mar 14 2018**

Customer	Contract/PO	#Visits	Contract Amt	Visit	Revenue
Fred Arnold	1200	2	100.00	Mar 05 2018	50.00
<b>TOTAL</b>					<b>50.00</b>

- **List of Scheduled Calls:** shows calls scheduled for the date range selected
- **Expiry List:** displays schedules deemed 'expired' if the last visit occurs during the date range specified.
- **Revenue Forecast:** forecast of future revenue from scheduled calls.

# Using Service Call and Service Sheet

## Overview

### Old Data Export

The only way to share information in older versions of these apps was to use email to send customers and rates, then to tap and hold the attached file in the email app on the device to install the data into the selected app.

### New Connected Apps

The latest versions of these apps now include the ability to share information between the apps without the need for an internet connection. The only requirement is that both apps must be installed on the same device.

Once the apps have been installed on the same device and started for the first time, the customers and rates can be exported between the apps. A new service sheet can be created for an existing call, and you can easily switch between each of the apps.

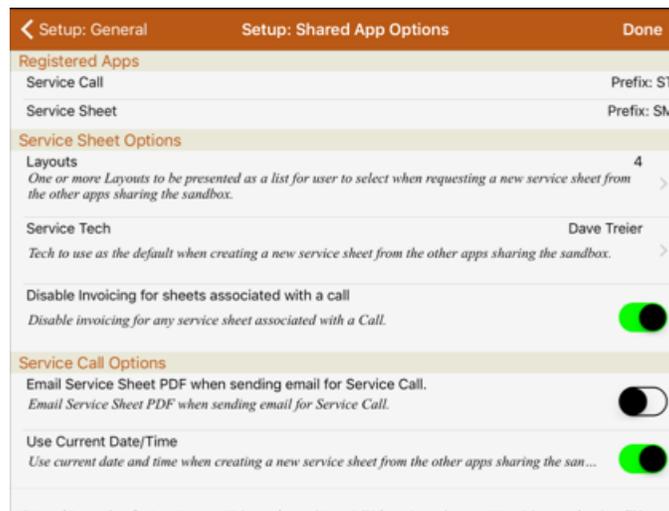
When using the new option on the Actions menu in either app to export data from one app to the other, the second app will automatically load and display the import summary information for the selected export.

## Shared Apps Configuration

We recommend the Shared App configuration steps be performed in the Service Sheet app first to reduce extra steps to configure Service Call.

### Service Sheet

Select *Shared App Options* from Settings to view / update the Shared App configuration options for Service Sheet.



This screen shot shows the default values for the options.

Tap *Layouts* to select the layouts to be visible to the other apps using the shared sandbox. Tap *Service Tech* to select the service tech to be used for any service sheet created from the other apps sharing the sandbox.

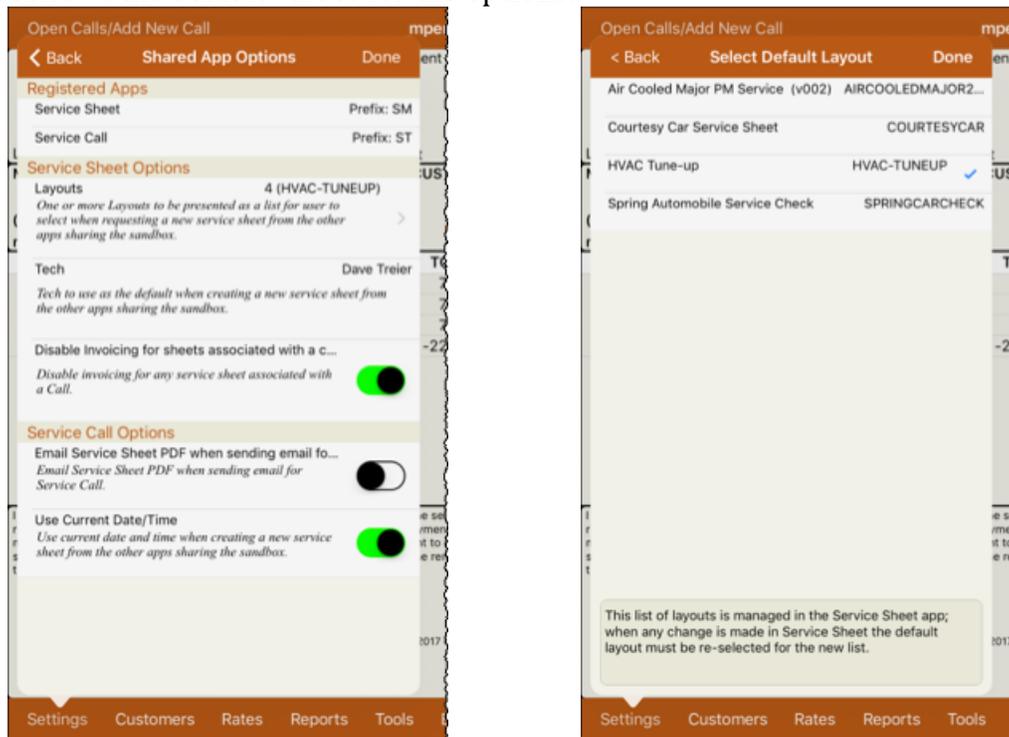
We recommend setting the option to disable invoicing for sheets associated with a call since most calls will include charges for the work performed.

If you are using Service Sheet for other activities not related to Service Call, these sheets call can still have charges attached to the sheet.

## Service Call

Select *Shared App Options* from Settings to view / update the Shared App configuration options for Service Call.

This screen shot shows the default values for the options.



The list of registered apps shows the apps installed on the device with access to the shared sandbox. These apps are designed to share information be used together.

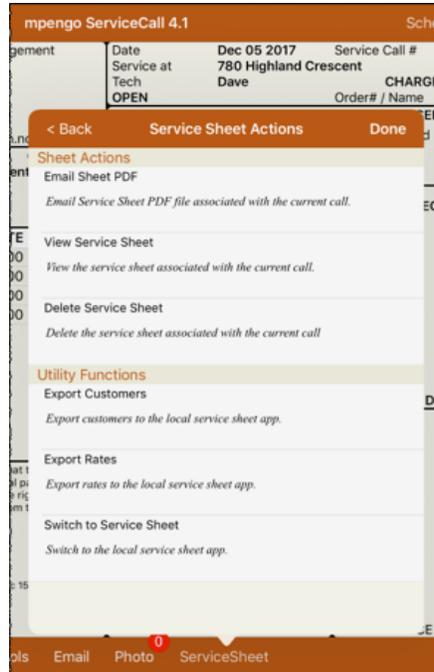
Tap the *Layouts* option to set the default sheet layout to use when creating a new sheet. Once selected, the default layout will display in the list on the Shared App Options page.

## Export Data to App

Select the export option for the app you are currently using to push information to the second app. The data will be merged with any that may already exist for the other app.

### Service Call

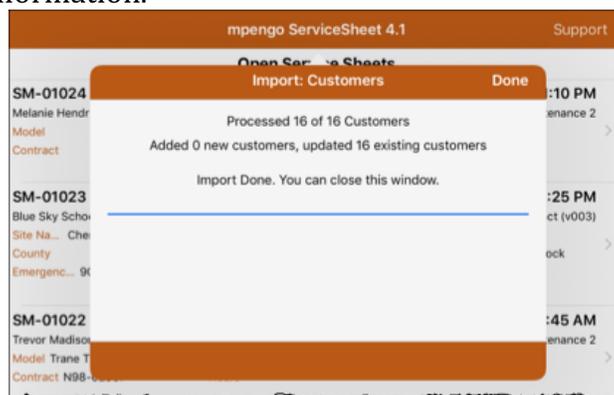
Tap the Service Sheet button on the toolbar to access the list of actions that can be performed from Service Call to Service Sheet.



The *Utility Functions* section of this list includes options to Export Customers, Export Rates, and Switch to Service Sheet.

### Service Call – Export Customers

Tap the Export Customers option in the list to begin the process to export the full list of customers from Service Call to Service Sheet. This will trigger an automatic switch to the Service Sheet app and show the Import Customer summary information.

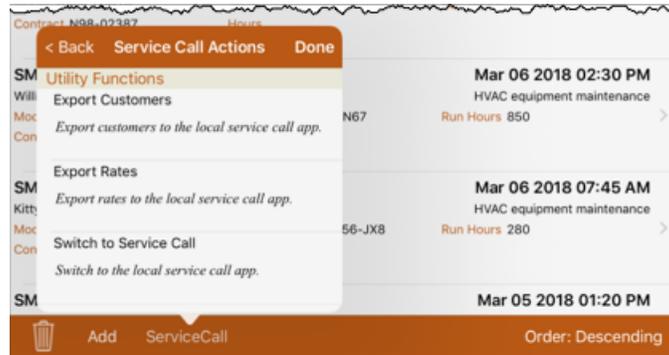


Tap the Done button to close the window and then tap the Service Call button on the toolbar to view the Service Call actions list and select the option to Switch to Service Call.



## Service Sheet

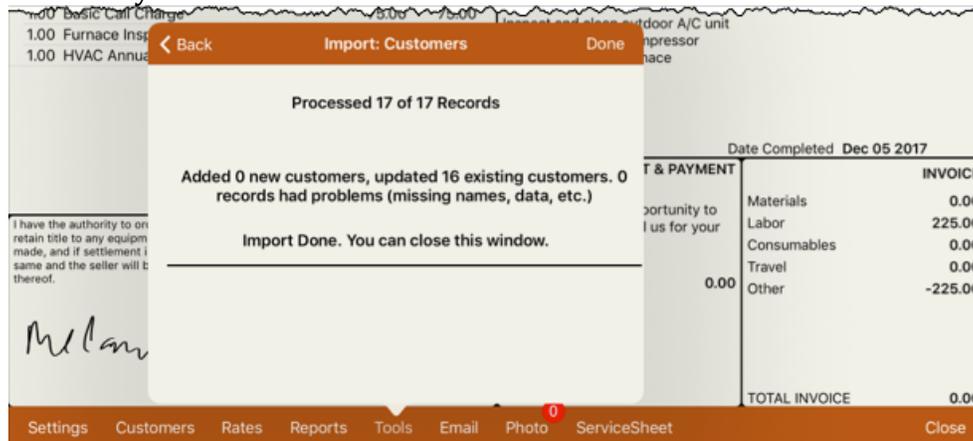
Tap the Service Call button on the toolbar on the Home screen (List of Open Service Sheets) to view the list of actions that can be performed from Service Sheet to Service Call.



The *Utility Functions* section of this list includes options to Export Customers, Export Rates, and Switch to Service Call.

## Service Sheet – Export Customers

Tap the Export Customers option in the list to begin the process to export the full list of customers from Service Sheet to Service Call. This will trigger an automatic switch to the Service Call app and show the Import Customer summary information.



Tap the Done button to close the window.



Tap the Service Sheet button on the toolbar to access the Service Sheet actions list and select the option to switch to Service Sheet.

## Other Information

A note on Memory: you may encounter memory limitations on your iPad (most iPads come with 1GB of working memory which is divided up between the internal operating system and your active apps—we're not referring to the 16GB, 32GB, or 64GB storage that you purchased with your iPad - that is data storage).

In general, when an app is no longer visible it will not be using any memory on the device. This is sometimes referred to as moving an app to the background but in fact, most apps are actually suspended and removed from memory. An exception to this statement is an app that is performing an activity in the background such as a navigation app.

A new feature is available in iOS 9 that allows specially designed apps to execute in a split screen mode. In this case, both apps are sharing the available memory and resources of the device.

### To close apps active in the background (iOS 9.3 and up)

- Double tap the Home button to bring up the multitasking view.
- Swipe or flick up on the screenshot (not icon) of the app you want to exit.
- The app will fly off the screen and release its resources.
- When done, tap the screen with all your icons or double tap the home button.

### If you have questions:

If you have any problems or questions, just tap Support, enter a subject, tell us your question, and tap Send. Remember to first indicate your contact name and email in Settings / Company & Support Info. You can also reach our support people (who are based in the U.S. and Canada) by sending a direct email to [support@mpengo.com](mailto:support@mpengo.com).

Our mpengo **Questions & Answers FAQ's** are also available by going to [www.mpengo.com](http://www.mpengo.com) and selecting Support.

### Develop this App with your support and comments!

If you like what you see, help support us by taking a look at some of our other apps that are also geared to provide help for business professionals out in the field – and tell your friends! We'd like to develop more tools suited to your needs, but need your help to spread the word. And send us your suggestions!

***A good review on the App Store would also be greatly appreciated!***