EServ

How-To: Navigating Customers and Properties in the Field App

Purpose: This guide will walk you through the features and how to use the Customers and Properties Tiles in the Field App.

The Customers and Properties Tiles are permission based. They must be toggled on for Employees to have access. Removing access will remove the tiles from the employee's home page and they will not be allowed to search for customers or properties.
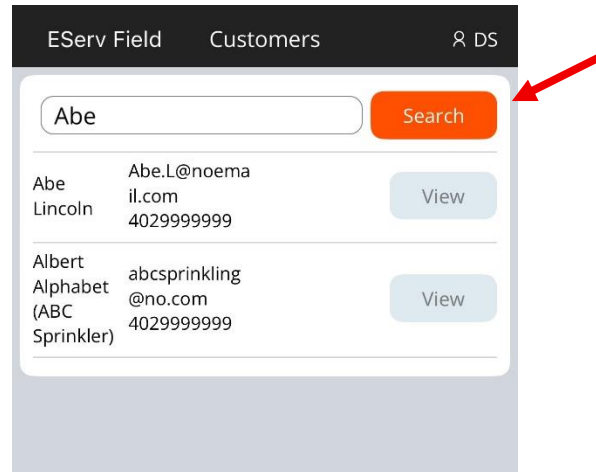
Note: employees will have access to the Customer and Property information from work order.
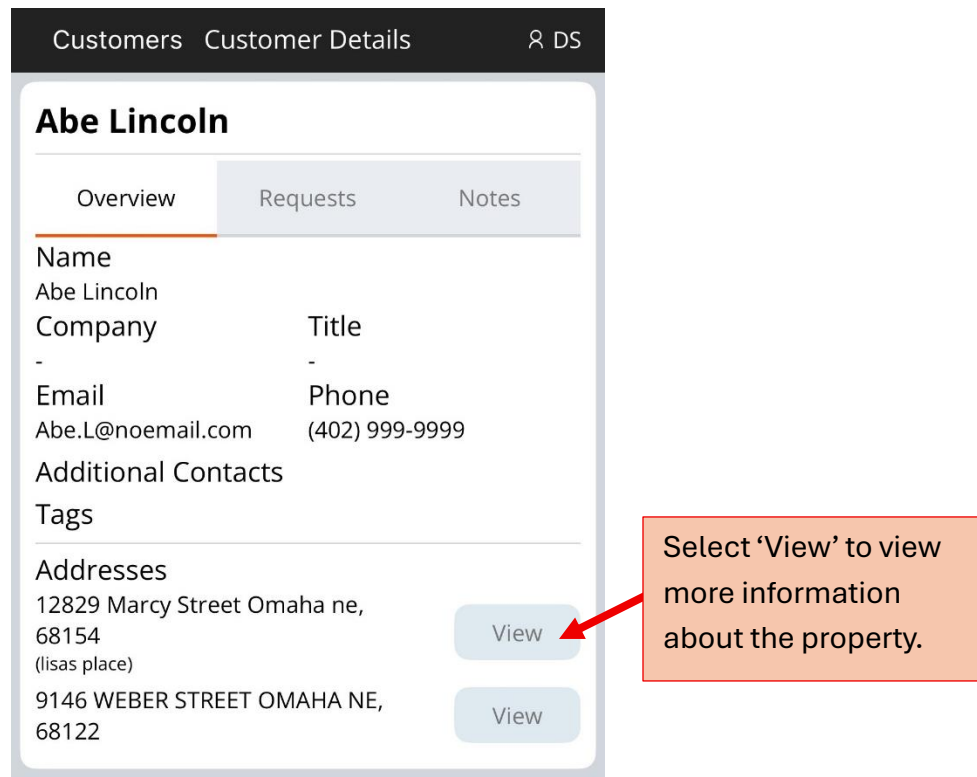
Navigating the 'Customers' Tile

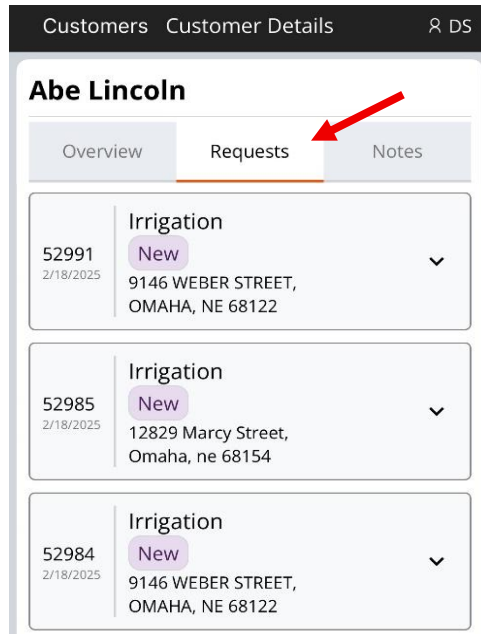1. On the home page, scroll and select the 'Customers' tile.
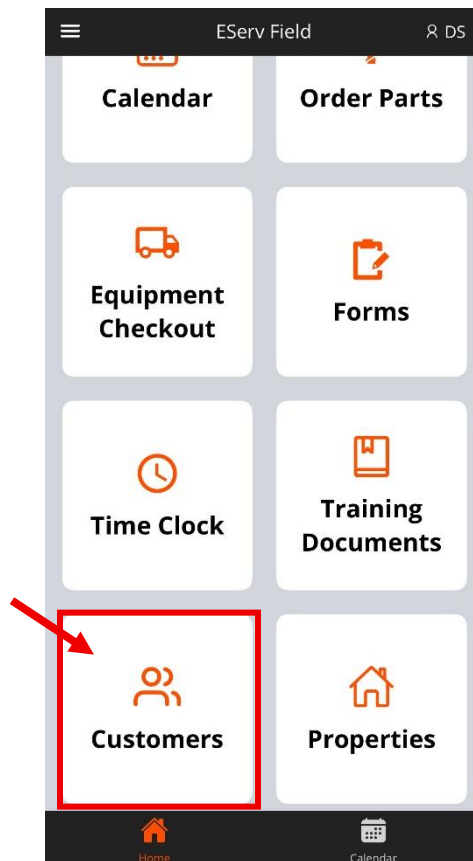
2. On this page, you can search for Customers and select a customer to view more details.
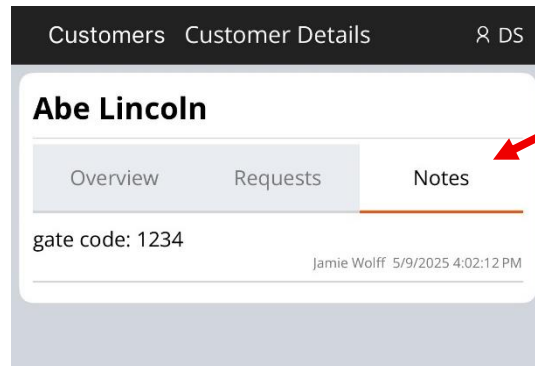

3. 'Customer Details' will give you an overview of Customer information.

Select 'View' to view more information about the property.

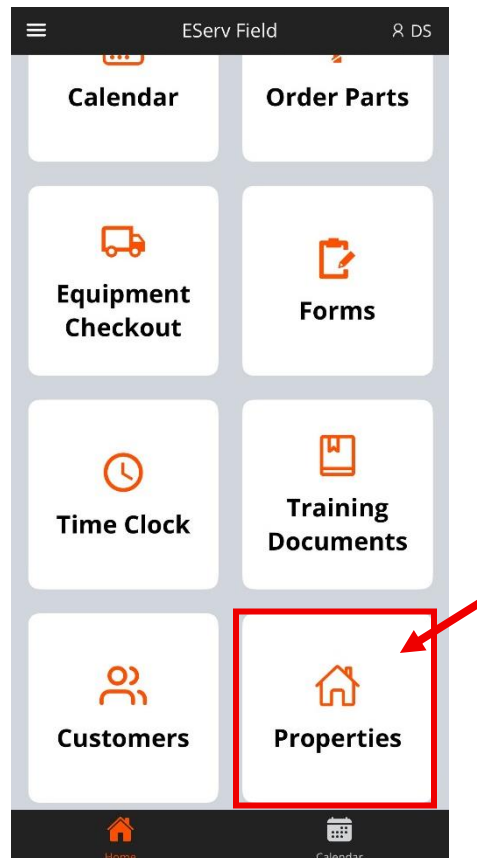4. Select 'Requests' to view current and past requests from the Customer.

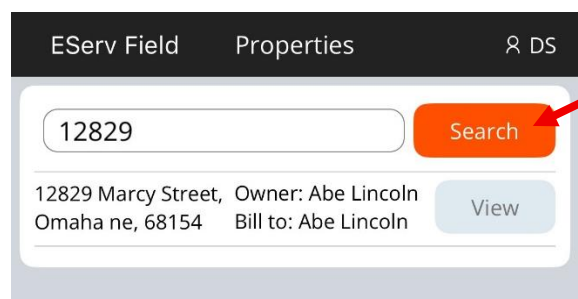5. Select 'Note' to view notes associated with the Customer's account.

Navigating the 'Properties' Tile

1. On the home page, scroll and select the 'Properties' tile.

2. On this page, you can search for properties by address, city or zip code.

3. On this page, you will see Property Details.
   a. In 'Custom Fields', you can edit or add information for this property and save on this screen.

4. Select 'Requests' to view requests associated with this address.

5. Select 'Map' to view a map of the property.
   a. EServ will automatically geocode the address when entered