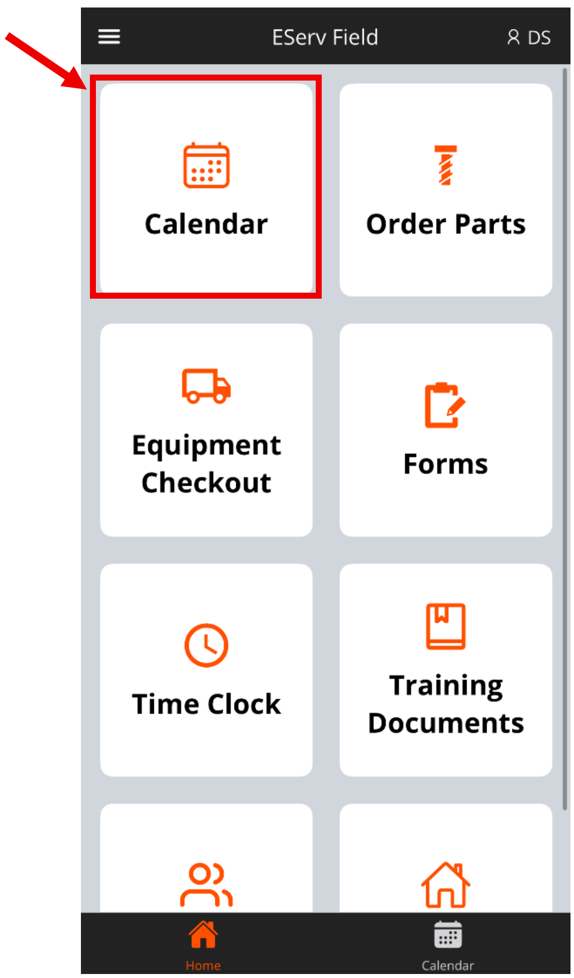
How-To: Navigating the Field App Calendar

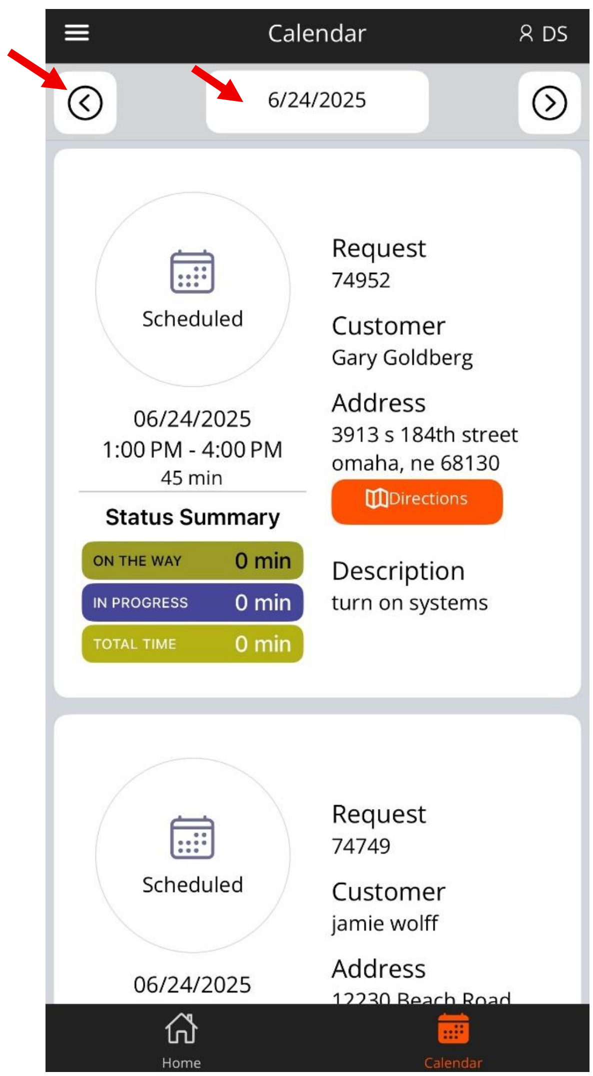
Purpose: This guide will walk you through the features and how to use the Calendar on the Field App.

Field App Calendar

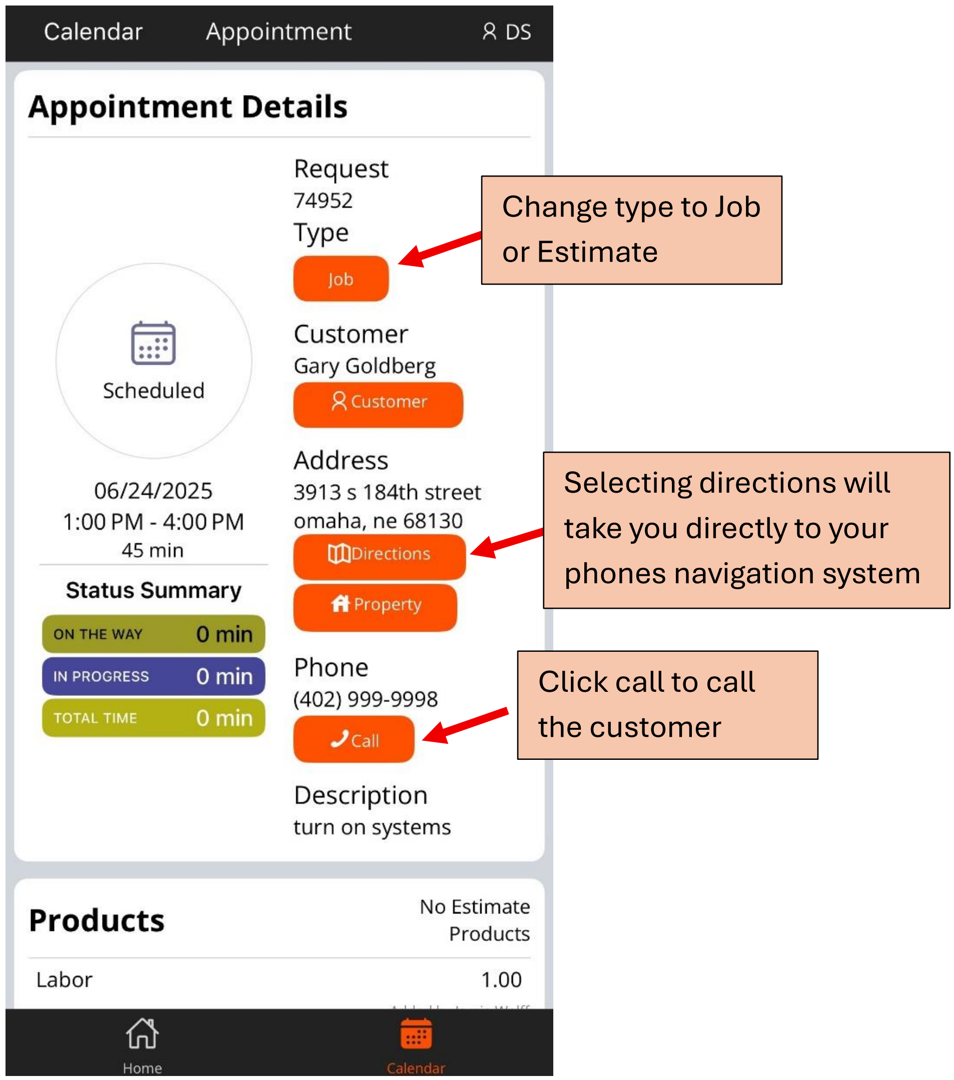
1. Select the 'Calendar' tile on the home page



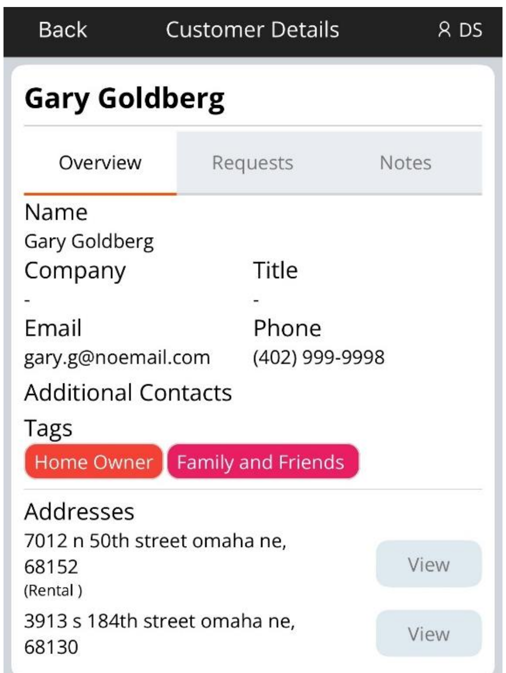
2. On this page, you will find your assigned appointments for the day. These are in chronological order.
    a. You can click on the date to view a full calendar or toggle back and forward (these are permission based and will need to be turned on). You can also allow individuals to only view the current date.
    b. To learn how to set employee permissions visit https://sales.eserv.com/how-to for a How-To guide.
    c. Once an appointment is completed, it will move to the bottom of the list.

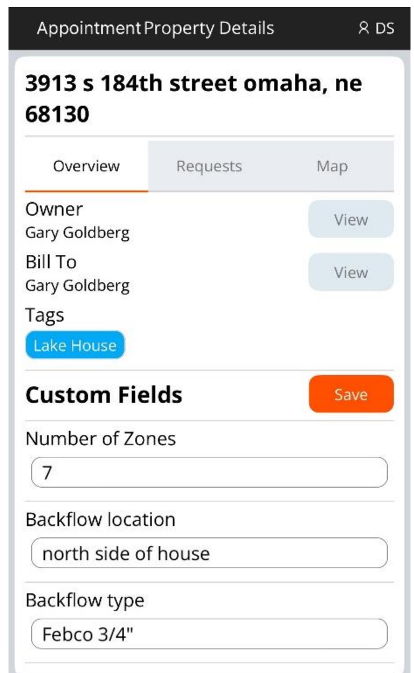


3. Clicking anywhere on the square will direct you to the appointment details.
    a. All of the orange buttons are hyperlinks and will direct you to more information.

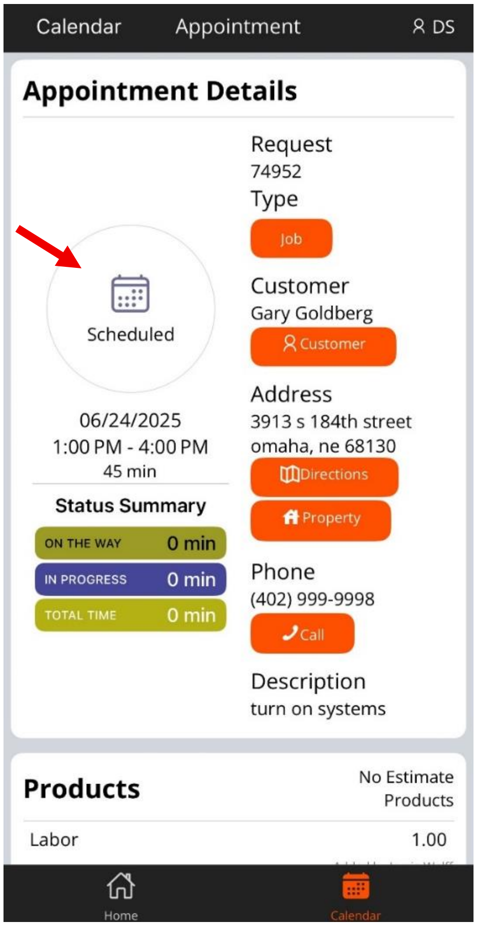


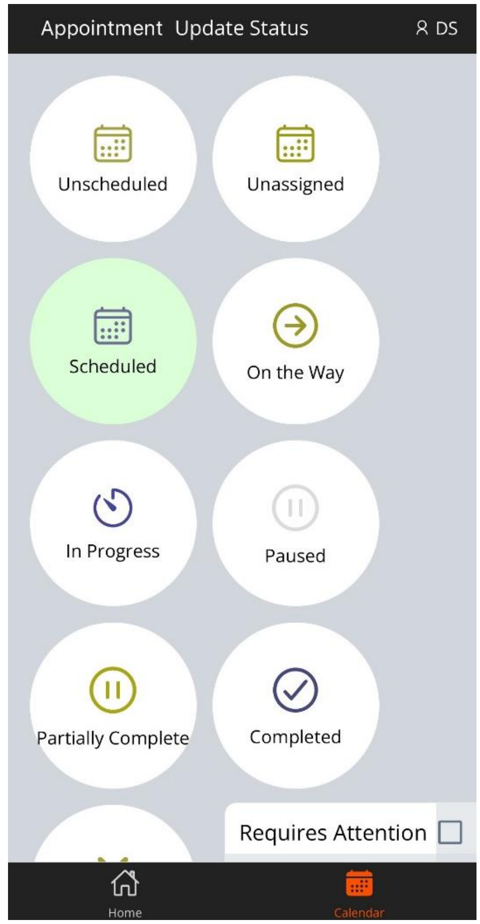
b. Selecting ‘Customer’ or ‘Property’ will direct you to another page with more details.
    i. On the Customer Details page, you can view customer contact and account details, all requests associated with their account and any notes on their account.
    ii. On the Property Details page, you can view more information about the property, all requests associated with the property and a map.





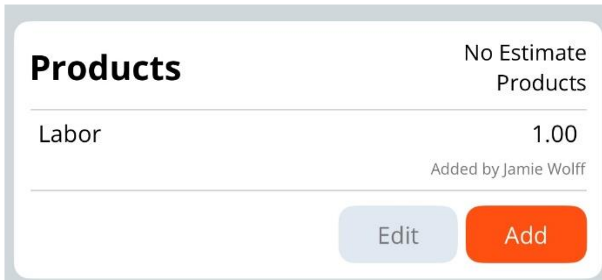
4. Click on the circle to update status



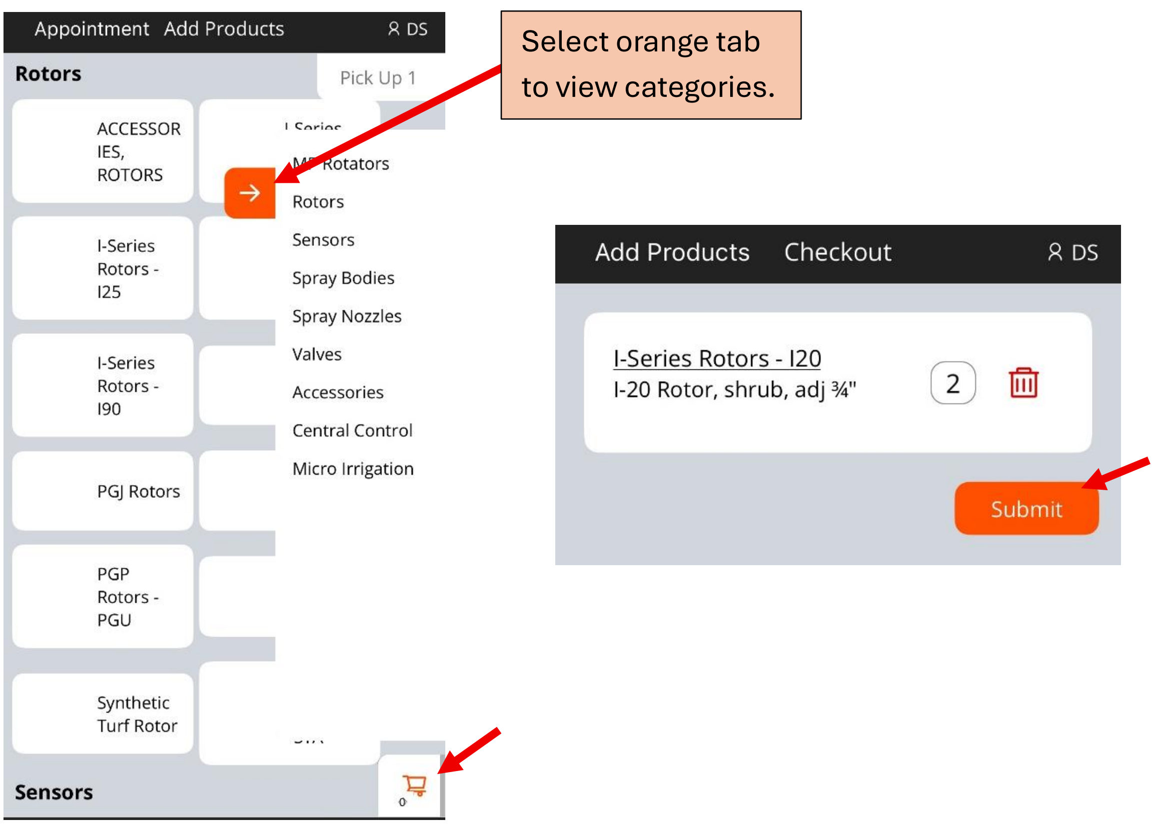


a. Select 'On the Way', this will send a text message to customer letting them know you are on the way.
b. Select 'In Process', this will start a timer for the amount of time you are on the job site.
c. Select "Complete' when you are completed.

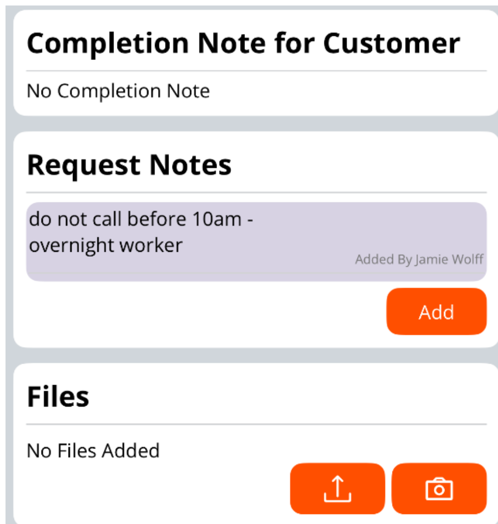
5. Scroll down on the Appointment Details and you will see other tiles with more information.
    a. Products
        i. Here you will be able to add products directly to the work order. This ties into the inventory system.



        ii. Select 'Add'
        iii. On this page, you will find products to add to your work order.
        iv. Once complete, select the cart in the lower right corner and select 'Submit'.



b. Completion notes for customer
    i. Left by the technician. This note will be visible on the invoice.
c. Request Notes
    i. These are notes for the office and technicians, not visible by the customer.
d. Files
    i. You can take or upload a photo or document to the work order.



e. Invoicing and payments
    i. Once completed you can create an invoice and take a payment.
    ii. To learn how to create an invoice or take a payment in the Field App visit https://sales.eserv.com/how-to for a How-To guide