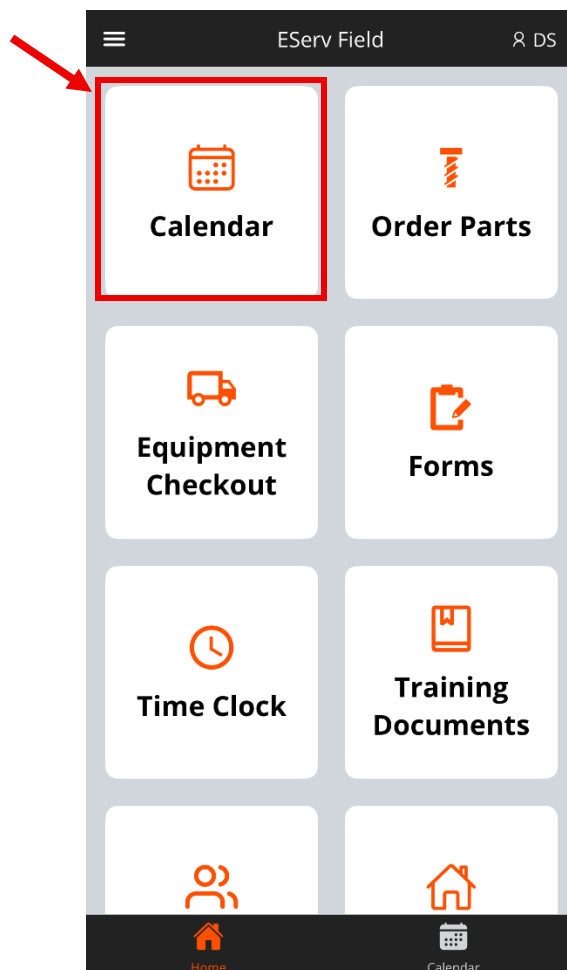


How-To: Navigating the Field App Calendar

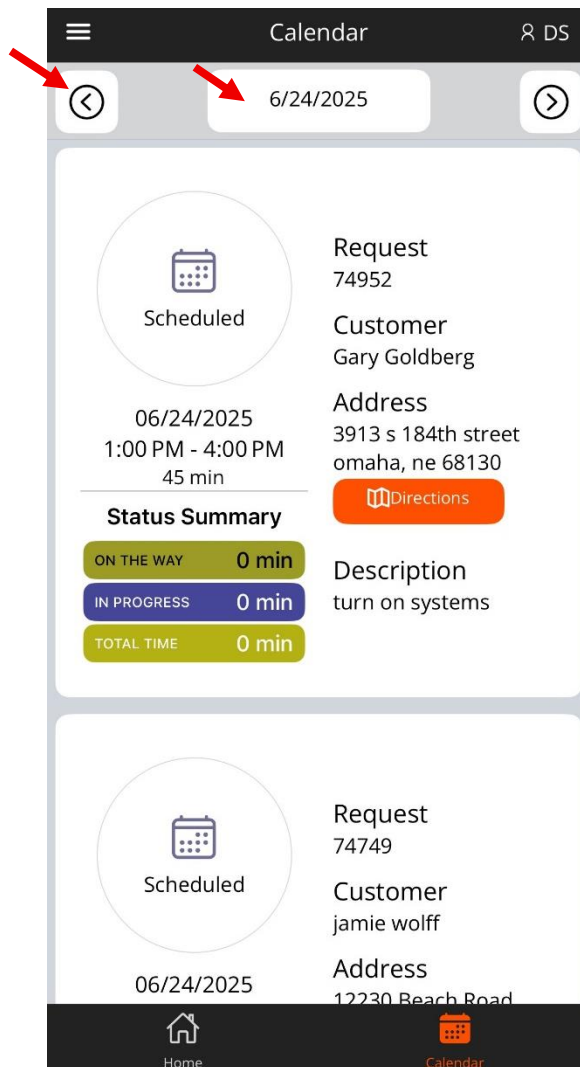
Purpose: This guide will walk you through the features and how to use the Calendar on the Field App.

Field App Calendar

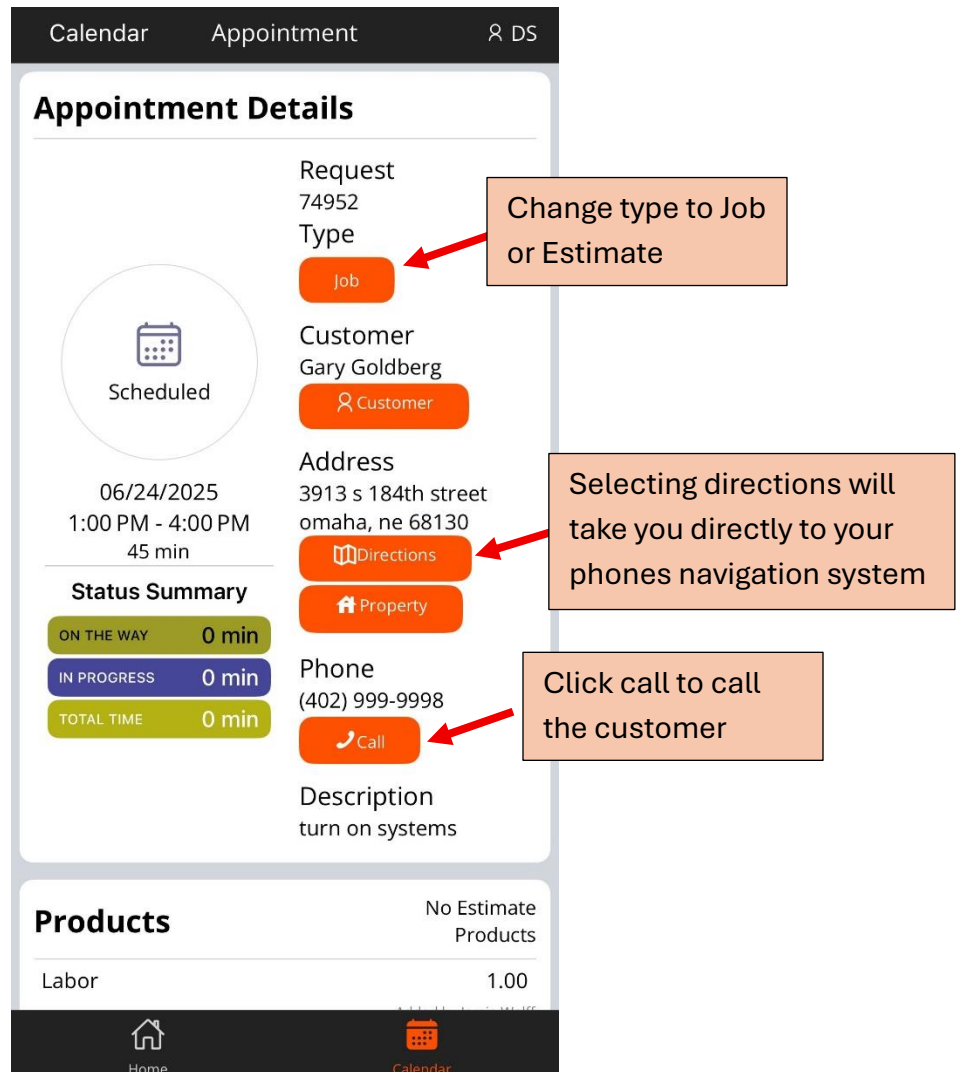
1. Select the 'Calendar' tile on the home page



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.

Back
Customer Details
DS

Gary Goldberg

Overview
Requests
Notes

Name
Gary Goldberg

Company
-

Email
gary.g@noemail.com

Additional Contacts

Tags
Home Owner Family and Friends

Addresses
7012 n 50th street omaha ne,
68152
(Rental)

3913 s 184th street omaha ne,
68130

Title
-

Phone
(402) 999-9998

View

View

AppointmentProperty Details
DS

3913 s 184th street omaha, ne 68130

Overview
Requests
Map

Owner
Gary Goldberg

Bill To
Gary Goldberg

Tags
Lake House

Custom Fields
Save

Number of Zones
7

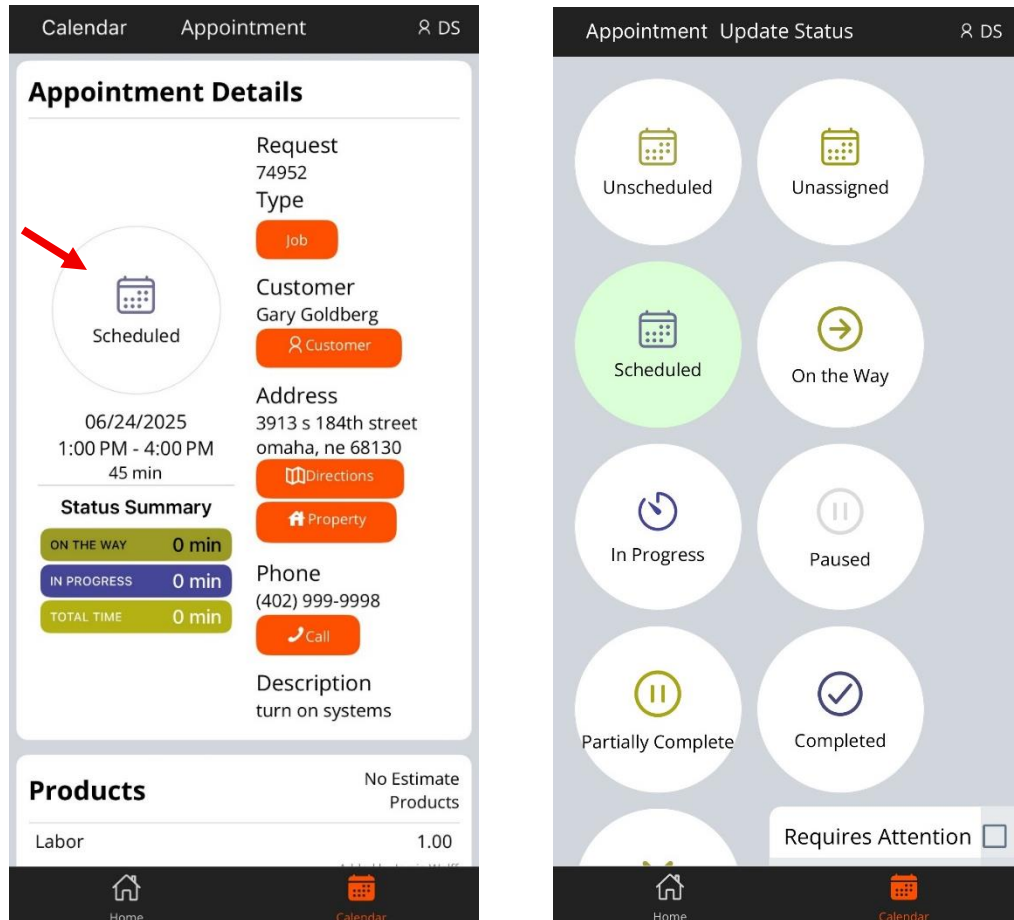
Backflow location
north side of house

Backflow type
Febco 3/4"

View

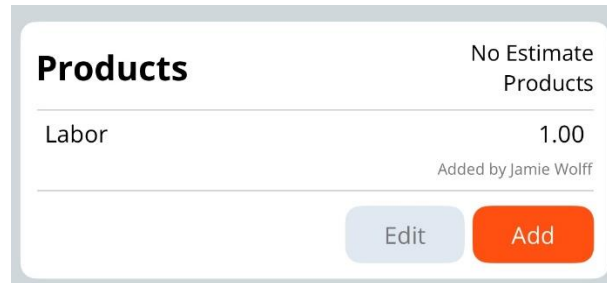
View

4. Click on the circle to update status

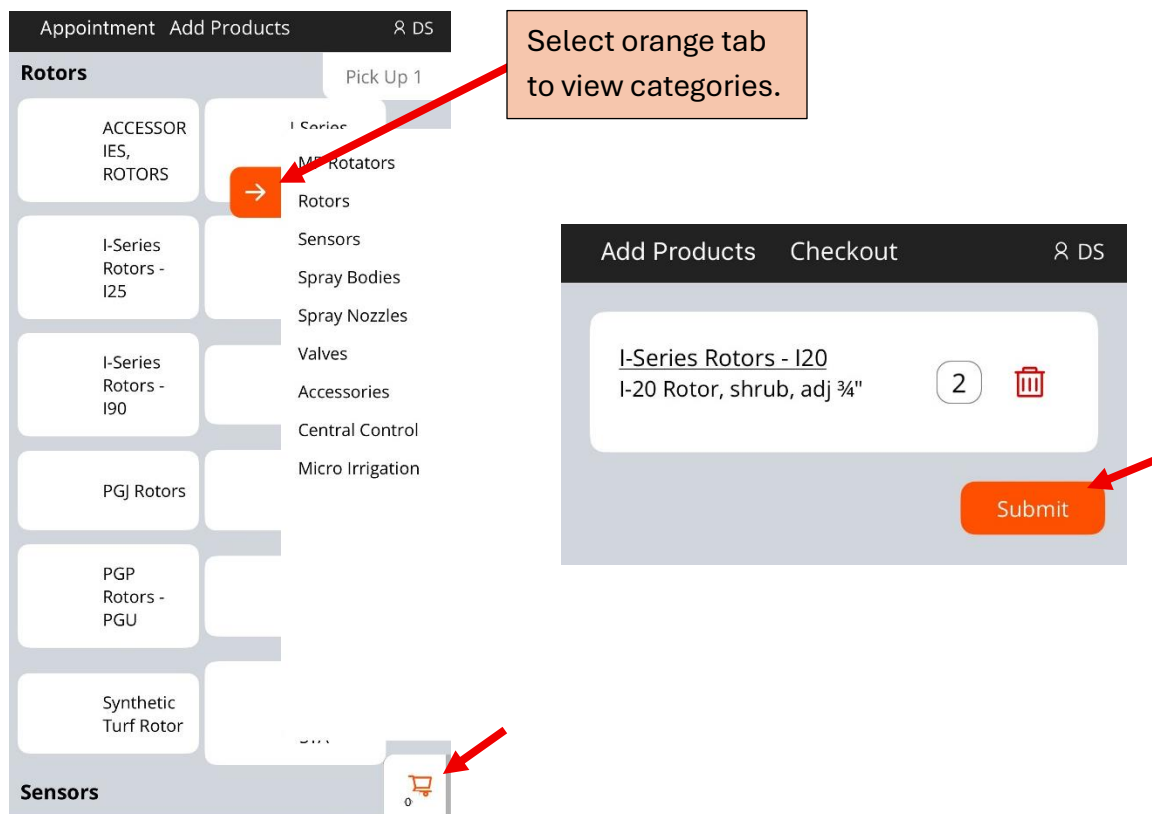


- Select 'On the Way', this will send a text message to customer letting them know you are on the way.
- Select 'In Process', this will start a timer for the amount of time you are on the job site.
- Select "Complete' when you are completed.

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.

The screenshot displays a mobile app interface with three distinct sections. The first section, titled 'Completion Note for Customer', contains the text 'No Completion Note'. The second section, titled 'Request Notes', features a text input field with the placeholder 'do not call before 10am - overnight worker', a small attribution 'Added By Jamie Wolff', and an orange 'Add' button. The third section, titled 'Files', shows 'No Files Added' and includes two orange buttons: one with an upload icon and another with a camera icon.

- 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

The screenshot shows two sections of the mobile app. The 'Invoices' section has a title, a plus icon in an orange button, and the text 'No Invoices Found'. Below it, the 'Payments' section also has a title, a plus icon in an orange button, and the text 'No Payments Found'.