

eWO Plus! Quick Start Guide

Electronic Work Order Generator - Simplify work in the field with this simple tool that processes work orders as well as point-of-sale and timesheets electronically and generates a PDF slip for your customers.

Opening Screen:

When you first open eWO Plus! you should read the steps carefully. Press your device's Menu button and select Settings to configure eWO Plus!.



Settings Screen:

Setting up eWO Plus! to work for you and your business is quick and easy.

Follow the steps below to get started with electronic Work Order processing for your business on your mobile devices.



Multiple Technicians In Your Business: Set a Unique Technician ID for each device running eWO Plus! and eWO Plus! will use this as the Work Order number prefix. That way, PDF Work Orders coming back to you at the office can be categorized by Technician.

Unique ID (Work Order # Prefix):	SMI51
Your Full Name:	Barry Smith
Company Name:	ACME Industries
Company Address:	123 ACME Lane
Company City:	Somewhere
Company State:	VT
Company ZIP:	08932

Sales Tax Parts %:	5
Sales Tax Labor %:	0
Company License #:	Company License #
Your Sales Terms:	By signing you agree that work was performed by our Technician and you are happy with this Service. Thank You for your business!
SD Card Path: (i.e. /mnt/sdcard/) Only change if necessary!	/mnt/sdcard/
Logo Name: (i.e. logoname.jpg) Must be in your SD Card Path Root!	ACMELogo2.jpg

Your Name and Company Address: eWO Plus! uses this information to print on the PDF Work Order slip that goes to you, back at the office as well as your Customer.

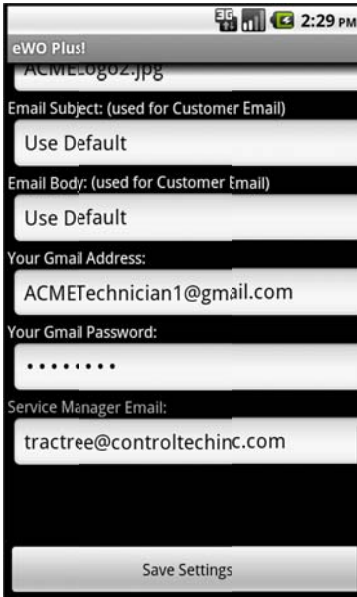
Sales Tax on Parts: eWO Plus! allows you to set a global Sales Tax for Parts, as well as allows you to adjust per Work Order if needed, useful if you work in multiple states.

Sales Tax on Labor: eWO Plus! allows you to set a global Sales Tax for Labor, as well as allows you to adjust per Work Order if needed, useful if you work in multiple states.

Company License #: Use this field if you are required by the state to include your company's license number on your printed documents. This will print on the PDF Work Order that goes to your customers via your Google Gmail account.

Your Sales Terms: Use this for the “fine print” of your terms and conditions of sale. This will print on the PDF Work Order that is generated and emailed to your Customer. These Sales Terms are also viewable by your Customer before they sign by pressing your device’s menu button and viewing the Sales Terms.

Logo Name: eWO Plus! allows you to direct it to where your company’s logo is stored on your SD Card in your device. If your logo is available, eWO Plus! will place it into the PDF Work Order above your company’s address to create proper letterhead. Just save your logo file to your SD card on the root (The path should be: "mnt/sdcard/yourlogo.jpg")... Then place the logo name (i.e. yourlogo.jpg) in the Logo Name field under Settings.



Email Subject & Body: When you have completed a Work Order and wish to email it to your customer, eWO Plus! will attach the PDF Work Order slip showing the work performed and your Customer’s signature to a preformatted email. Use the default verbiage that eWO Plus! has or customize the preformatted email’s Subject and Body.

Your Gmail Address: IMPORTANT! eWO Plus uses your device’s Gmail account to send out your Work Orders. Make sure you enter the Gmail address correctly!

Your Gmail Password: IMPORTANT! Your Gmail password must be entered correctly or no emails will be sent out. Please be sure to enter it correctly and it is case-sensitive!

***** Note: If your device doesn’t have the Gmail App preinstalled download it from the marketplace and install it in order to email your work orders.**

Service Manager Email: That’s your email address back at the office! This will allow you to get a copy of all Work Orders sent from your Technicians’ devices and store them appropriately for your records.

Once you have entered all your settings, Save Settings and restart eWO Plus!... Then click the Next button to get started!

Now, You’re Ready to Begin! Here’s a look at your new Main Menu area of eWO Plus!



eWO Plus! is designed with re-use in mind. Whether you frequently visit the same Projects or Customer Sites, use the same Parts, or have a group of Technicians, you can save time by entering your common data and information into eWO Plus! for re-use when needed.

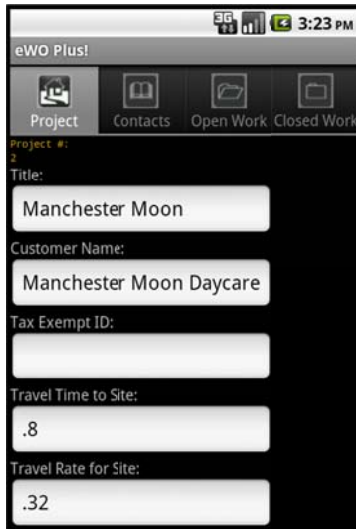
Doing this allow your Technicians to save time by not having to repeatedly enter the same Project, Contact, or Parts data for every Work Order.



To add a Project / Customer:

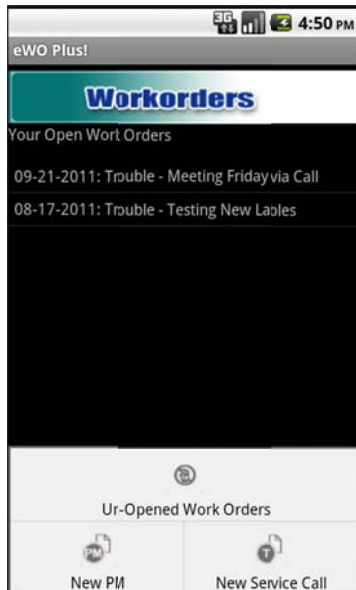
1. From the Main Menu click Projects / Contacts
2. Press the device's Menu button
3. Click Add Project from the popup menu
4. Fill in details for Project / Customer
5. Save Project
6. Click on the Project you just created
7. Click on the Contacts tab
8. Fill out Contact details
9. Click on Add Contact (You can have multiple contacts for the same project).

These Projects and Contacts will be available to you in a selection list from the Work Orders.



To add a Work Order under a Project / Customer:

1. Click the Projects / Contacts button
2. Click the Project you need to create the Work Order for
3. Go to Open Work Orders tab
4. Press the device's Menu button and select either New PM or New Service Call
5. Fill out the Work Order Title
6. Click Add Service Call to List
7. New Work Order is now entered, re-open the Work Order from the list to process!



To add a Work Order under Work Order center:

1. Click the Workorders button
2. Press the device's Menu button and select either New PM or New Service Call
3. Fill out Work Order Title
4. Click Add Service Call to List
5. New Work Order is now entered, re-open the Work Order from the list to process!

Project / Customer Name:

Project Contact:

To assign a Work Order to a Project / Customer from the Workorders center:

1. Select the Work Order you want to assign to a project from the Work Orders list
2. Click on the Select Project/Customer button
3. Select the Project/Customer you wish to assign this Work Order to, this action will populate the Contacts list from the newly selected Project / Customer. Then you can select and assign the Contact from that list.

eWO Plus! 3:40 PM

Timesheet

Manage Timesheets

To add a Timesheet:

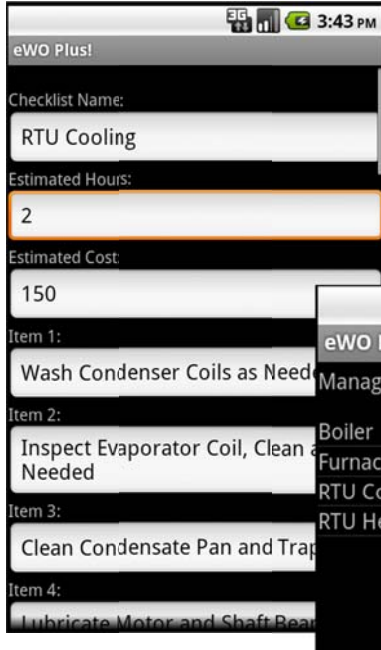
1. Click on the Timesheet button
2. Press the device's Menu button
3. Click New Timesheet
4. Select Week Ending Date
5. Select Technician to assign the Timesheet to
6. Click Add Timesheet to list
7. You can now manually add time to the time sheet, and you'll also be able to add time automatically via the Labor tab from an open Work Order.

eWO Plus! 3:42 PM

Technician:
 ...

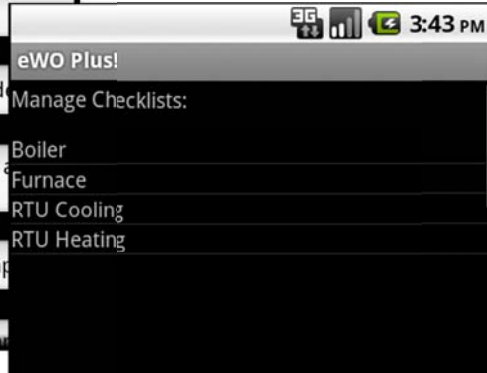
Week Ending Date:

Office Notes:



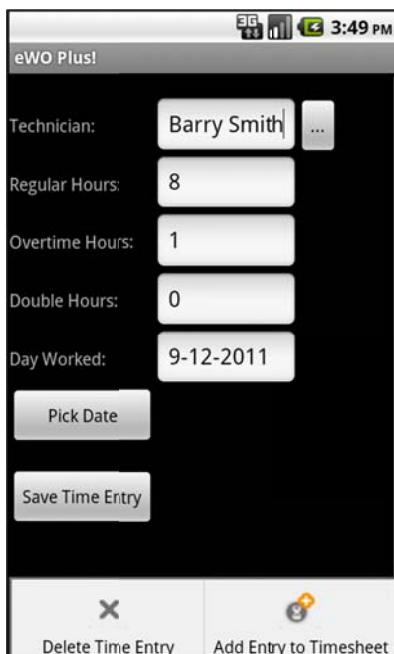
To add a Checklist Template:

1. Click on the Checklist Templates button
2. Fill out a Checklist name
3. Add up to 30 items for each Checklist you create
4. Click Add Checklist Template to save it




To add a Part to the Parts List:

1. Click on the Common Parts List button
2. Enter the Part Name and details
3. Click Add Part to List



To add Time from an open Work Order to the Timesheet:

1. Click on the Workorders button
2. Click on the Work Order
3. Click on the Labor Time tab
4. Click the time entry
5. Click the Menu button
6. Click the Add Entry to Timesheet button

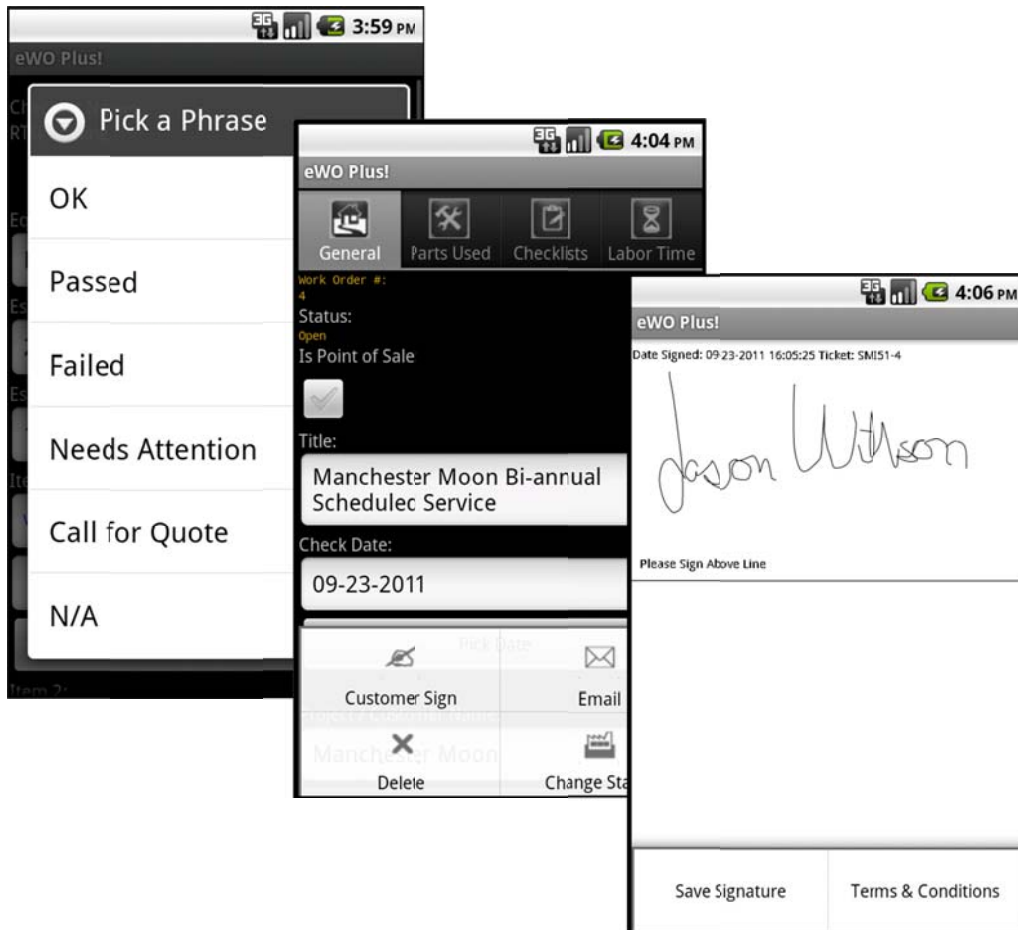
At the end of the work week, your Technicians can sign their Timesheet on their device and email it in PDF format to you back at the office all from eWO Plus!.



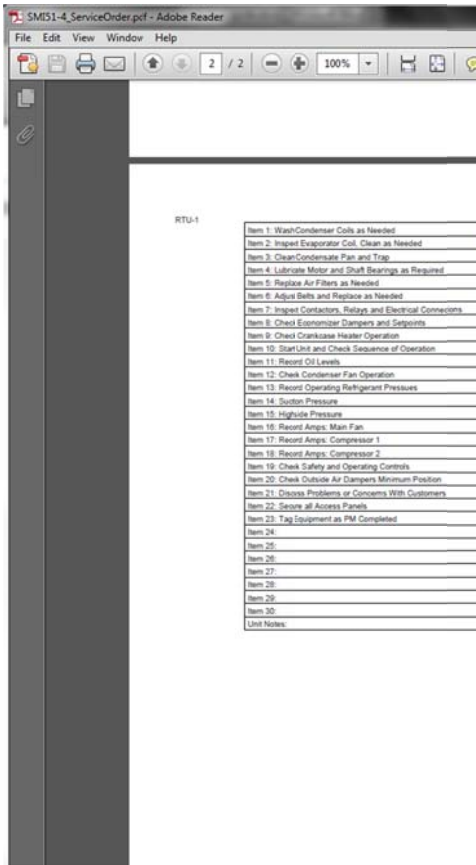
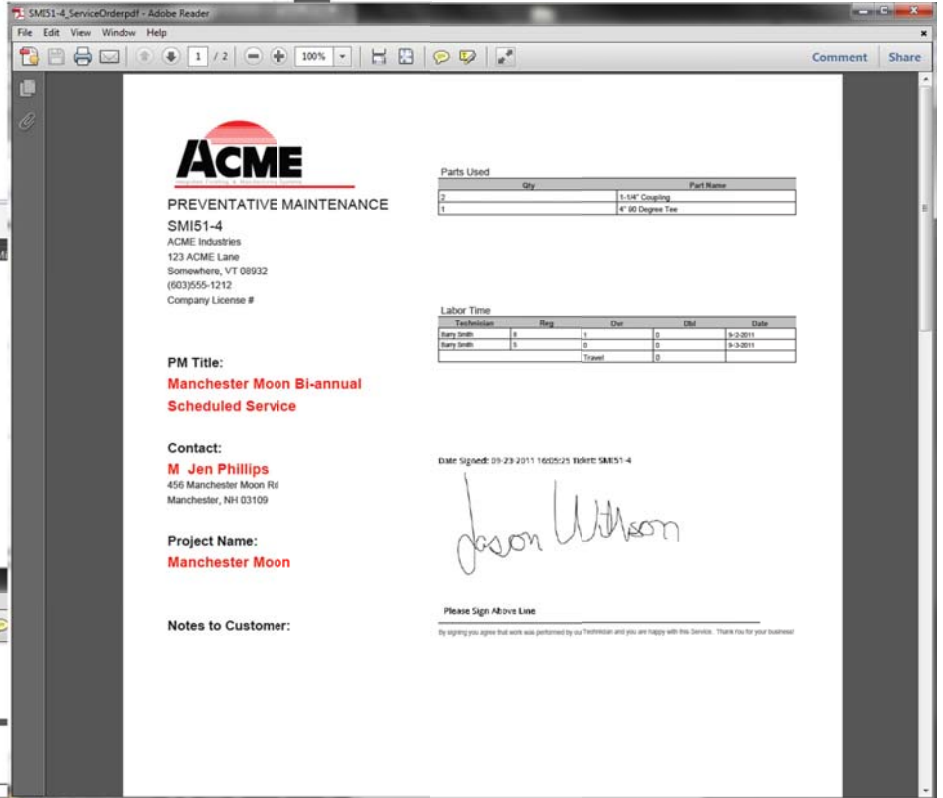
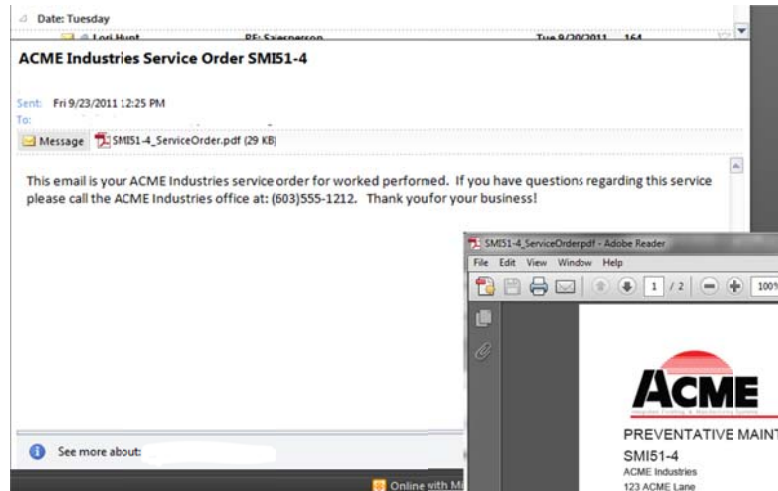
Steps To Complete a Work Order:

1. Click on the Workorders button
2. Click on the Work Order
3. Fill out the details on each tab for Parts Used, Checklist, and Labor
4. Press the device's Menu button
5. Click on Customer Sign
6. After the customer signs Click the Menu button
7. Click on Save Signature
8. Press the device's Menu button
9. Click Email
10. Click send email now and wait (Do not press the button more than once!).
11. You will see email sent

The images below show some screens and the finished product to the Customer! Enjoy!



Email to the Customer's Inbox and PDF Work Order slip attachment:



Point-of-Sale Example of the same Work Order:

The screenshot shows a mobile application interface with a top navigation bar containing icons for General, Parts Used, Checklists, and Labor Time. Below the navigation bar, the work order details are displayed:

- Work Order #: 4
- Status: Open
- Is Point of Sale:
- Title: Manchester Moon Scheduled Service
- Check Date: 09-23-2011

A dialog box titled "Please Click Sign:" is overlaid on the screen, displaying the following financial summary:

- Parts Total: \$14.81
- Labor Total: \$360.00
- Total: \$374.81
- Amount Paid: \$374.81
- Balance: \$0.00

The dialog box has "Sign" and "Cancel" buttons.

The screenshot shows a web browser displaying a service order summary page for ACME. The page includes the following information:

ACME
PREVENTATIVE MAINTENANCE
SMI51-4
 ACME Industries
 123 ACME Lane
 Somewhere, VT 08932
 (802)555-1212
 Company License #

PM Title:
Manchester Moon Bi-annual Scheduled Service

Contact:
M Jen Phillips
 456 Manchester Moon Rd
 Manchester, NH 03109
 (802)555-1212

Project Name:
Manchester Moon

Notes to Customer:

Parts Used

Qty	Part Name	Cost per	Total
2	1-1/4" Coupling	\$5.0	\$10.0
1	4" 90 Degree Tee	\$2.5	\$2.5
		Sales Tax 5%	\$0.71
		Parts Total	\$14.81

Labor Time

Technician	Reg	Rate	Qty	Rate	Qty	Rate	Date	Total
Barry Smith	1	\$20.0	1	\$20.0	0	\$0.0	9-12-2011	\$20.0
Barry Smith	1	\$20.0	0	\$20.0	0	\$0.0	9-13-2011	\$0.0
			Travel	0	Travel Rate	\$0	Travel Total	\$0.0
					Sales Tax 5%	\$0		\$0
					Labor Total			\$360.00

Your Ticket Total: \$374.81

Amount Paid: \$374.81

Balance: \$ 0.0

Payment Type: Check #: 54024

Tax Exempt ID# (If Applies):

Date Signed: 09-23-2011 16:38:34 Ticket: SMI51-4

Jason Wilson