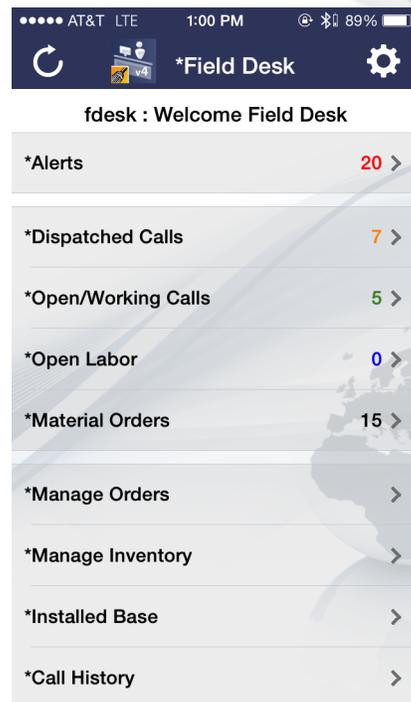




BROOM STREET SOFTWARE

"Sweeping Away The Competition..."

User Guide for the Field Desk™ App



CONFIDENTIAL

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www.BroomStreet.com



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Objectives/Summary

Field Desk Summary

Outstanding service in the field is the key to customer satisfaction. The Broom Street Field Desk mobile App for QAD gives field engineers anywhere, anytime, access to relevant information from their mobile device. By bringing the right resources, knowledge and information to the point of interaction, you can enhance the productivity of your field service engineers and improve the efficiency of service operations, while maximizing value from your QAD SSM Application.

Business Challenges

1. Deliver exceptional field service and maintain profitability
2. Improve efficiency and productivity of field service engineers
3. Make optimal use of resources
4. Get timely and accurate information from the field

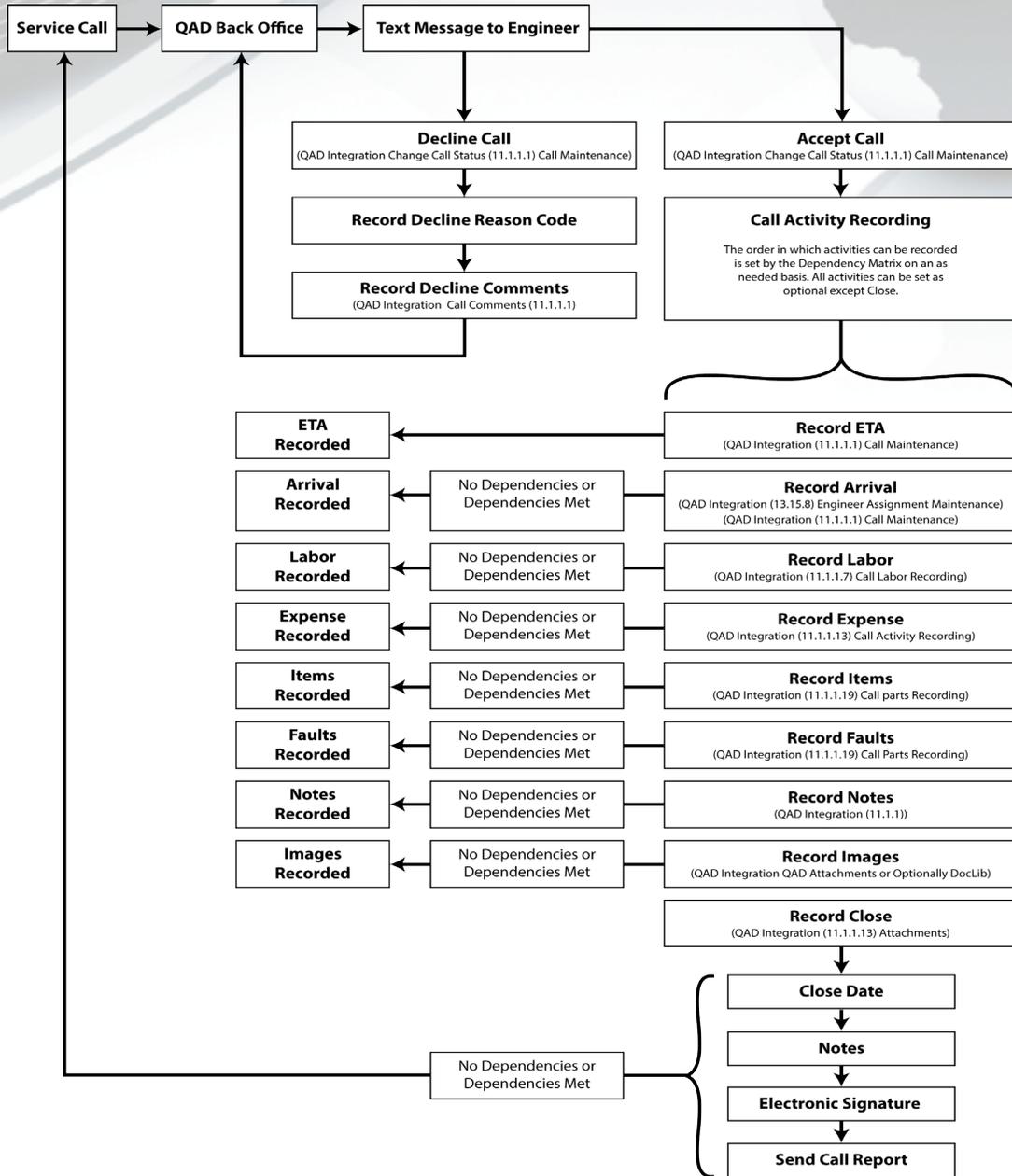
Features

- Alerts:** Notify engineers of new service calls to accept/reject and status of material orders
- Review Calls:** Empower engineers to make timely decisions by providing critical call information
- Record Activity:** Record call activity such as ETA/arrival/labor/expenses/faults/notes
- Call Activity Dependencies:** Ensure call activities are recorded in a systematic and predefined manner
- GPS Integration:** Integrate GPS capabilities to route engineers to the call location
- Record Images:** Use a mobile device to record/capture images related to the call
- Order Inventory:** Need spare parts? Use a mobile device to order inventory
- Review Inventory:** Review field service inventory and make cycle count adjustments as needed
- Installed Base:** Review/update installed base records

Business Benefits

- Raise customer satisfaction
- Increase productivity of field service engineers
- Lower costs
- Manage spare parts inventory
- Capture high quality data with real-time collection at customer sites

Call Reporting Flow





Login Setup

WebSite: Put in corporate URL. Your IT department can provide this information.
Username: Put in your username.
Password: Put in your password.

Select the “Save and Test” button.

If all is correct you will get a message “All settings appear to be valid!”

If information is not correct you will get an error message.

Correct invalid field(s) and try “Save and Test” again.

Note: Domain field will populate if “All settings appear to be valid!”.

Domain: Select domain or use default.

Press “Done” button in top right corner.

•••• AT&T LTE 9:53 AM 26%

*Done

*Website:
http://71.175.81.27:8090/wsa/wsa1

*Username:
fdesk

*Password:
•••••

*Save and Test

*Set to Demo

*Domain:
CPC

*Version: 4.0

Working with Alerts

Alerts are messages from the QAD System that are sent to the field engineer to notify them of certain events. The following 4 Alerts are predefined in the Field Desk module. Custom alerts may be provided as needed. These alerts will not only show on the mobile device but will also be SMS texted to the user.

- Dispatched Calls:** Notify engineers that a new call to process is available
- New Material Order:** A new material order has been entered by the QAD System for the engineer
- Past Due Material Order:** A material order for the engineer has gone past due
- Shipped Material Order:** A material order for the engineer has been shipped

In the App you press the Alert button to view your list of alerts, you will notice that by default, you only see alerts that have not be read by the user. You can toggle to read alerts by pressing the read alert button.

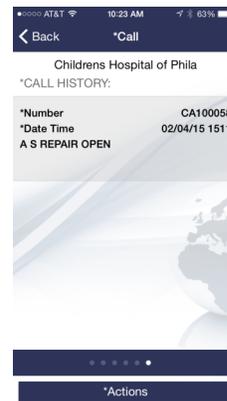
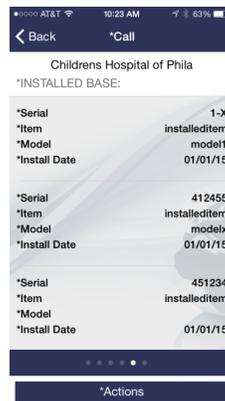
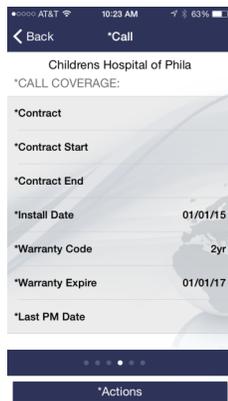
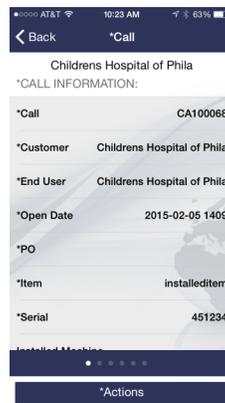


Alerts will be removed from the device after a pre-defined number of days, by userid. You can view more information about the call or material order by drilling into the alert.

Viewing Call Data

The following information can be viewed for each call regardless of what status it is in.

1. Call header data
2. Call comments/notes
3. Call Address information (you can view a map on the device to find a route to the call)
4. Call ISB information
5. Call coverage
6. Call history information



On any of the call screens (Dispatched/Working or Drilling from Alerts and call History) you can view the following data by following the “bread crumbs” of your mobile device and using your slider. The Mobile Desk backend setup is flexible enough to add 10 additional fields on certain call data screens.



Accepting a Service Call

A dispatched call will show on the engineer's device. If the field engineer is able to accept the call they press the accept button on the bottom of the screen. They have the ability to enter in accept comments if they choose to accept the call. The status of the call will be change in the QAD System in real-time so futher activity may be recorded.

AT&T 10:52 AM 61%

Back *Call

Childrens Hospital of Phila

*CALL INFORMATION:

*Call	CA100075
*Customer	Childrens Hospital of Phila
*End User	Childrens Hospital of Phila
*Open Date	2015-02-08 0910
*PO	
*Item	installeditem
*Serial	xx-7

Installed Machine

*Accept *Decline

AT&T 7:31 PM 64%

Back *Call Home

AI Dupont Childrens Hospital

*CALL INFORMATION:

*Call	CA100059
-------	----------

*Cancel

*Remarks

*Accept

*Serial	I-3
---------	-----

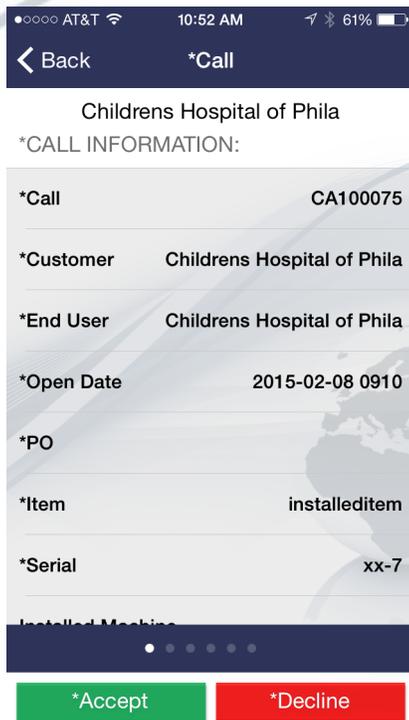
Installed Machine

*Accept *Decline

***Once a call is accepted it can not undone by the engineer, The engineer must contact the office to set the call status back to another state.**

Declining a Service Call

A dispatched call will show on the engineer's device. If the field engineer is unable to respond to this call they press the decline button on the bottom of the screen. If an engineer declines a call they must key in a reason code and have the ability to enter in remarks. The status of the call will be changed in the QAD System to be rescheduled to another field engineer.



AT&T 10:52 AM 61%

Back *Call

Childrens Hospital of Phila

*CALL INFORMATION:

*Call CA100075

*Customer Childrens Hospital of Phila

*End User Childrens Hospital of Phila

*Open Date 2015-02-08 0910

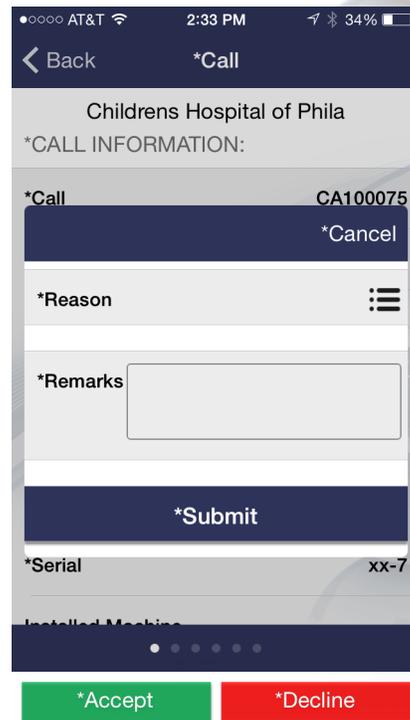
*PO

*Item installeditem

*Serial xx-7

Installed Machine

*Accept *Decline



AT&T 2:33 PM 34%

Back *Call

Childrens Hospital of Phila

*CALL INFORMATION:

*Call CA100075

*Cancel

*Reason

*Remarks

*Submit

*Serial xx-7

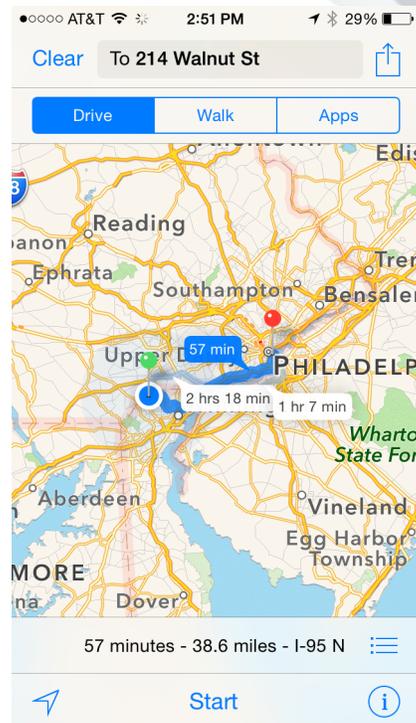
Installed Machine

*Accept *Decline

***A user must key in a reason code but does not have to key in remarks. The status will be updated in real-time and sent back to the QAD System.**

Routing a Service Call

By taking advantage of the GPS capability of your mobile device you are able to bring up Apple Maps or Google Maps or any other map software installed on your device. You can route a call in two places. One when viewing the call address data or pressing the actions button at the bottom of the screen of an accepted call.

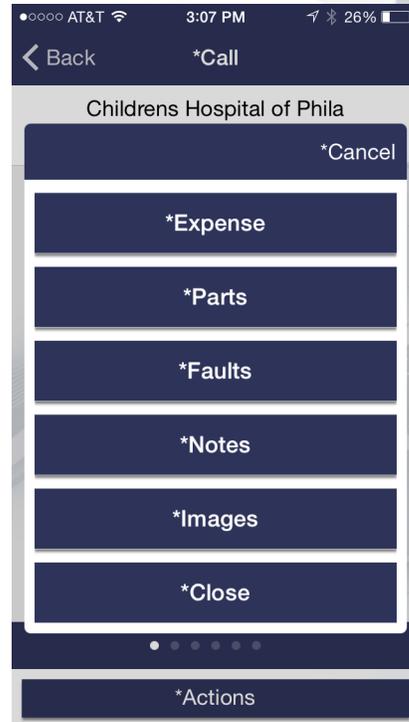
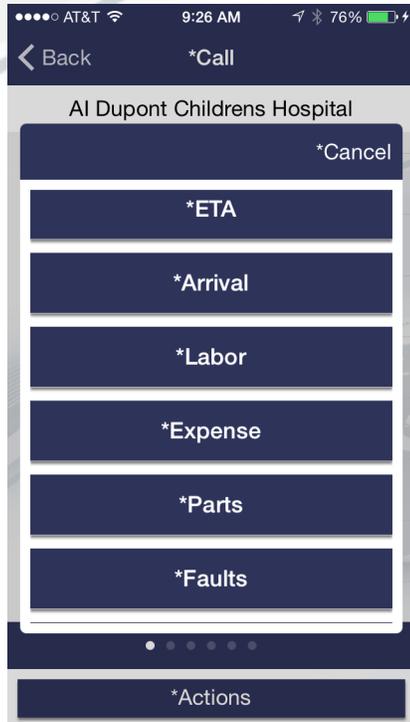


Using the power of the mobile device you can route your way to your customer's site.



Call Activity Recording

By pressing the actions button on your mobile device you will be presented with a series of buttons based upon your control settings in Mobile Desk. You can limit the buttons that show up by type of service call/domain and userid. If you have any call dependencies you may be forced to record data in a certain order.



When calls are closed/complete you may still record images about the call but may not record any more activity.



Recording ETA and Arrival

Call Activity (“Call ETA”)

ETA recording allows you to record the estimate time you will arrive at the enduser’s site. This interfaces with QAD by updating call comments.

Call Activity (“Call Arrival”)

Enter the date/time and estimated time of labor required to complete this call. Once submitted, this will change the status of the QAD call to the value in the Mobile Desk control file. It will also create an entry in the engineer scheduling function.

●●○○ AT&T 8:21 PM 16%

< *Call *ETA

*Add ETA

*Cancel

*Date 2015-02-08

*Time 20:21

*Save

●●○○ AT&T 8:23 PM 16%

< *Call *Arrival

*Add Arrival

*Cancel

*Date 2015-02-08

*Time 20:22

*Est Hours

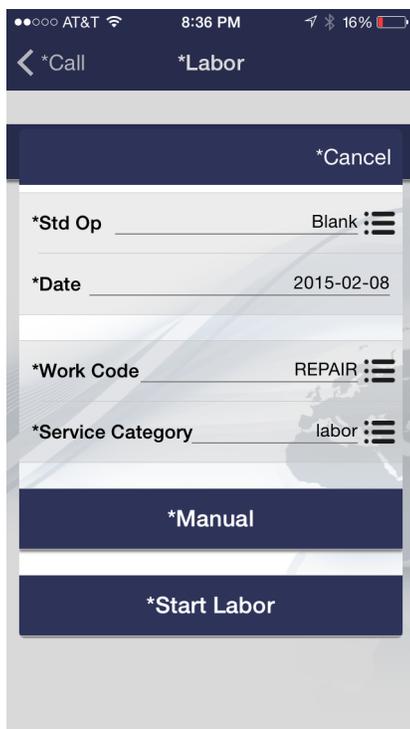
*Save

Prior to closing the call you will have the ability to go back and modify/delete or create new values.

Recording Labor

Call Activity (“Call Labor”)

There are two ways to record labor in Field Desk. You can manually record labor by keying in the start time and duration or you can use a “clock in/clock out” methodology where you allow the user to record when they start a job and then use the main screen to record when you end the labor. The duration will be calculated for the user automatically. By entering in a standard operation you can default the work code and service category required for entry of labor. You also have ability to key in those fields if they change.



AT&T 8:36 PM 16%

< *Call *Labor

*Cancel

*Std Op ⋮

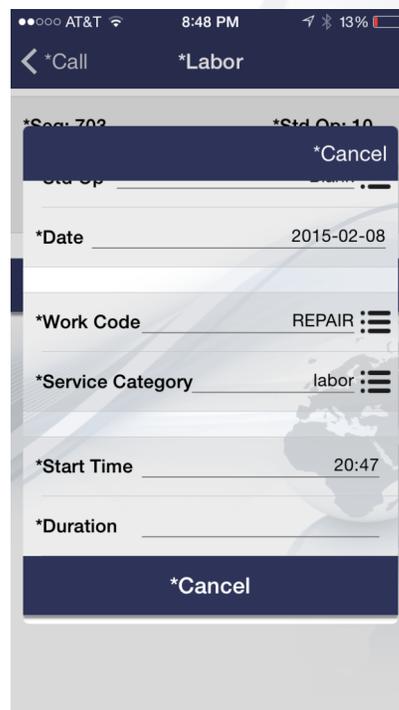
*Date

*Work Code ⋮

*Service Category ⋮

*Manual

*Start Labor



AT&T 8:48 PM 13%

< *Call *Labor

*Std Op ⋮

*Date

*Work Code ⋮

*Service Category ⋮

*Start Time

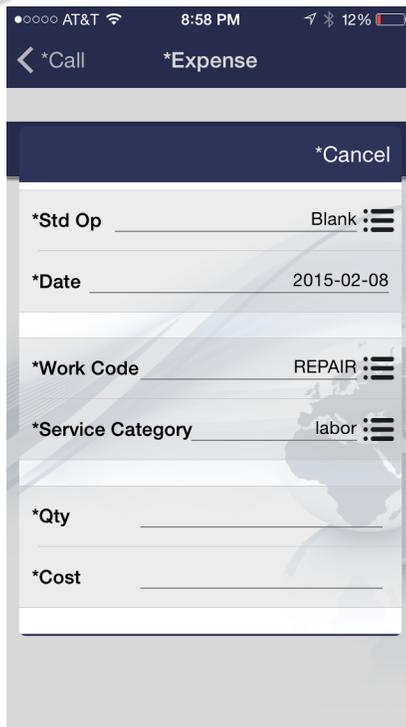
*Duration

*Cancel

Recording Expense

Call Activity (“Call Expense”)

In Field Desk you can record expenses that you incur during the call. By entering in a standard operation you can default the work code and service category required for entry of expenses. You key in the cost of your expense and the quantity. You also have the ability to key in those fields if they change.



AT&T 8:58 PM 12%

< *Call *Expense

*Cancel

*Std Op _____ Blank

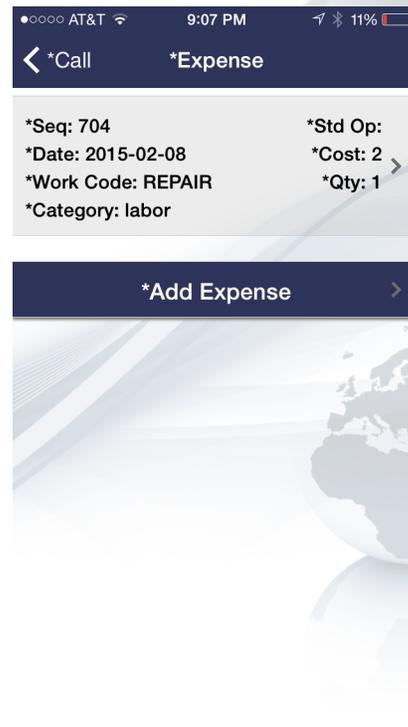
*Date _____ 2015-02-08

*Work Code _____ REPAIR

*Service Category _____ labor

*Qty _____

*Cost _____



AT&T 9:07 PM 11%

< *Call *Expense

*Seq: 704 *Std Op:

*Date: 2015-02-08 *Cost: 2 >

*Work Code: REPAIR *Qty: 1

*Category: labor

*Add Expense >

Once you key in your data you have the ability to change the expense data prior to it being processed by QAD. Once processed, you can enter additional expense information or reverse the original.



Recording Parts

Call Activity (“Call Parts”)

In call activity you can record parts that are used during the call. The system first prompts for a lot number. If you choose to scan a lot number that exists in the system then the item number and quantity will default. Only those inventory records in the engineer’s site/location record will display or default on the input frame. You can scan or type in a lot or choose from a list.

- Date:** Enter the effective date, defaults to today’s date
- Lot Number:** Choose from list/scan or key in
- Part:** Choose from list/scan or key in
- Qty:** Enter quantity used on this call

The screenshot shows a mobile application interface for recording parts during a call. The status bar at the top indicates "No Service", "9:12 PM", and "9%" battery. The app header shows a back arrow, "*Call", and "*Parts". A "*Cancel" button is at the top right. The form contains the following fields:

- *Date: 2015-02-08
- *Lot: lot-10 (with a barcode icon and a list icon)
- *Part: M-145678 (with a barcode icon and a list icon)
- *Ref: (empty)
- *Qty Oh: 1

A "*Save" button is located at the bottom of the form.



Recording Faults and Notes

Call Activity (“Call Faults”)

You have the ability to enter call fault codes as defined in generalized codes in QAD. You are prompted for a problem/cause and resolution code and the number of hours spent on the activity. These fault codes will be integrated into QAD.

Call Activity (“Call Notes”)

You also have the ability to record comments/notes that relate to the service call you are working on.

The screenshot shows the 'Call Faults' screen. At the top, the status bar displays 'No Service', '9:13 PM', and '8%' battery. The app header includes a back arrow, '*Call', and '*Faults'. Below the header is a '*Cancel' button. The main form contains four sections, each with a menu icon to its right: '*Problem' with the text 'Won't Turn On', '*Cause' with 'No Electricity', '*Resolution' with 'Order New Parts', and '*Hours' with an empty input field. At the bottom of the form is a '*Save' button.

The screenshot shows the 'Call Notes' screen. The status bar displays 'AT&T', '9:14 PM', and '8%' battery. The app header includes a back arrow, '*Call', and '*Notes'. Below the header is a '*Cancel' button. The main form contains a '*Notes' section with a large empty text input area. At the bottom of the form is a '*Save' button.



Entering Material Orders

Engineers may replace their inventory by placing material orders and having them shipped directly to the end-user or to their location. On the mobile device, the orders are set to a pending status which then transfers to a real QAD material order once the Mobile Desk back-end processes them. You also have the ability to search orders as well as viewing them. You can enter multiple items on an order but must have at least one item ordered on the device. Once processed by the server, you will receive optional alerts indicating that the orders have been shipped.

AT&T 7:41 AM 9%

< Back *Request for Order

*Order Date 2015-02-09

*Call Number

*Ship To Engineer

*Ship Via 4H Logistics

*Remarks

*Required Date 2015-02-09

*Due Date

*Additional Notes

AT&T 7:42 AM 9%

< Back *Add Item

*Qty

*Item

*Save



Viewing Material Orders

You can view existing material orders from the main home screen or pending orders from the manage orders menu. You have the ability to view order header information and drill into the line item information as well. These orders, once shipped, will be removed from the view. Only open material orders show on the mobile device.

AT&T 8:00 AM 28%

< Home *Material Orders

*Domain: CPC *Order: MO100012
*Name: John Smith
*Status: OPEN
*Due Date:

*Domain: CPC *Order: MO100010
*Name: Childrens Hospital of Phila
*Status: OPEN
*Due Date: 2015-02-08

*Domain: CPC *Order: MO100009
*Name: John Smith
*Status: OPEN
*Due Date: 2015-02-07

*Domain: CPC *Order: MO100006
*Name: Al Dupont Childrens Hospital
*Status: OPEN
*Due Date: 2015-02-06

*Domain: CPC *Order: MO100005
*Name: Al Dupont Childrens Hospital

AT&T 8:00 AM 28%

< Back *Order Line Details

*Part A-011298

*Desc 1 Consumer 5800 46300

*Desc 2 DISCNT 46300

*Qty Ship 0

*Qty Pick 0

*Qty Ord 2

*Due Date

AT&T 8:00 AM 28%

< Back *Material Order Details

*Call

*Order Date 02/09/15

*Due Date

*Cust Name Internal Customer

*Ship jsmith

*Ship Name John Smith

*Address 562 Dawson Tract
Yorklyn DE 19736
USA

*ITEMS

A-011298: Consumer 5800 46300 2 >

In the Mobile Desk back-end you have the ability to enter additional fields to show on the order header and order line details section.



Entering Cycle Counts

Manage Inventory Cycle Counting

The engineer may perform cycle count transactions to reconcile or create inventory. This inventory is stored in the site/location as defined by QAD for the field engineer. You can use the camera on the mobile device to scan lot numbers and items. The cycle count transaction immediately updates QAD and changes your inventory balance.

The screenshot shows a mobile application interface for entering cycle counts. The status bar at the top indicates AT&T service, 7:43 AM, and 10% battery. The header bar contains a back arrow and the text '*Cylce Count'. The form includes several input fields: '*Lot/Serial' with a barcode icon, '*Item' with a barcode icon, '*Ref', '*Qty', '*Remarks' (a larger text area), and '*Eff Date'. A dark blue button labeled '*Submit' is at the bottom.

The screenshot shows a mobile application interface for searching inventory. The status bar at the top indicates AT&T service, 7:43 AM, and 10% battery. The header bar contains a back arrow and the text '*Search Inventory'. The form includes three input fields: '*Lot/Serial', '*Item', and '*Desc'. A dark blue button labeled '*Submit' is at the bottom.

You can also use your device to search the current inventory the engineer has in their possession. The search is by item/lot and description. You can scan or enter in the information for lot/item.

Reviewing Installed Base

If you wish to search your installed base records the system will show any installed base item that is at an end-user where the field engineer is the primary engineer assigned to the end-user. That way you may view all items that you are potentially responsible for. You can search by item/end-user and name. You will be presented with a list of end-user's that you are responsible for and can drill into their installed base.

AT&T 7:43 AM 10%

< Back *End User

*Name: Childrens Hospital of Phila
 *Address: 562 Dawson Tract
 Yorklyn DE 19736 >

*Name: Al Dupont Childrens Hospital
 *Address: 562 Dawson Tract
 Yorklyn DE 19736 >

*Name: Childrens Hospital of Phila
 *Address: 214 Walnut Sreet
 Philadelphia PA 19141 >

*Name: Childrens Hospital of Phila
 *Address: 214 111 Street
 Stone Harbor NJ 08427 >

*Name: Childrens Hospital of Phila
 *Address: 562 Dawson Tract >

AT&T 7:43 AM 10%

< *Home *Installed Base

*EU Code _____

*EU Name _____

*Item _____

*Submit

AT&T 7:43 AM 10%

< *End User *Installed Base Details

*Item: installeditem
 *Desc: Installed Machine
 *Serial: xx-5
 *Qty: 1 *Model: model1

*Item: installeditem
 *Desc: Installed Machine
 *Serial: xx-6
 *Qty: 1 *Model:

*Item: installeditem
 *Desc: Installed Machine
 *Serial: xx-7
 *Qty: 1 *Model:

Once you get to the installed base details, you can drill into and see more information about the installed base records.



Reviewing Call History

You can query all calls that have been assigned to the engineer. This will show all calls in all statuses as long as the calls were assigned to the engineer setup on the mobile device. A list of calls will appear and all call views documented before will be available to the user.

Mobile app screenshot showing the 'Call History' form. The form has a dark blue header with a back arrow and the text '*Home *Call History'. Below the header are five input fields: '*Status', '*Lot/Serial', '*Item', '*PO', and '*EU Name'. Each field has a light gray border and a small barcode icon to its right. At the bottom of the form is a dark blue button with the text '*Submit'.

Mobile app screenshot showing a list of call history entries. The header is dark blue with a back arrow and the text '< *Call History *Calls'. The list contains six entries, each with a light gray background and a right-pointing chevron. The entries are:

*NBR	*Line
CA100075	1
*DateTime: 2015-02-08 0910	
*Desc 1: A S REPAIR WORKING	
CA100074	1
*DateTime: 2015-02-08 0834	
*Desc 1: A S REPAIR OPEN	
CA100073	1
*DateTime: 2015-02-08 0833	
*Desc 1: A S REPAIR OPEN	
CA100072	1
*DateTime: 2015-02-07 1745	
*Desc 1: A S REPAIR OPEN	
CA100071	1
*DateTime: 2015-02-07 0623	
*Desc 1: A S REPAIR COMPLETE	
CA100070	1
*DateTime: 2015-02-07 0623	