User Guide

QAD Mobile Field Service

70-3247-3.1
QAD Mobile Field Service 3.1
March 2012

MFS_UG_v31.pdf/hes/hes

QAD Inc.
100 Innovation Place
Santa Barbara, California 93108
Phone (805) 566-6000
http://www.qad.com

Contents

Change Summary

The following table summarizes significant differences between this document and previous versions.

Date/Version	Description	Reference
March 2012/3.1	Separated previous *Technical Reference* into separate *Installation Guide* and *User Guide* volumes	--
	Removed the section on differences on Pocket PCs	--
	Removed all references to personal digital assistant (PDA) devices throughout the book	--

Chapter 1

QAD Mobile Field Service Overview

QAD Mobile Field Service is a set of programs to enable engineers and technicians to review and create data in the field using laptops. This chapter gives an overview of the use of QAD Mobile FS and the data flow between QAD Enterprise Applications and QAD Mobile FS.

About QAD Mobile Field Service

QAD Mobile Field Service (QAD Mobile FS) is a store-and-forward application that lets field engineers or technicians access and enter service call information remotely from laptops. Users run the application on mobile devices independent of a connection to a central server. This requires periodic synchronization of the client and server data stores. QAD Mobile FS remote access and updates let field personnel:

- Review and update assigned calls.
- Create new calls.
- Report call activity.
- Order spare parts and parts to use for a call.

Using QAD Mobile FS Overview

The production QAD Enterprise Applications serves as the source database and application for your service and support operations. Additional tables and several additional programs in QAD Enterprise Applications are required to support QAD Mobile FS. Each user must be configured in QAD Mobile User Maintenance (11.1.12.1).

Setting Up QAD Mobile FS Data

Before beginning synchronization with devices, each device user must be defined in QAD Enterprise Applications using QAD Mobile User Maintenance (11.1.12.1). Settings in this program are used to authenticate the device user and also determine how data is replicated and updated on the device. See “Setting Up QAD Mobile FS User Accounts” in *Installation Guide: QAD Mobile Field Service*.

Admin settings are also provided on the device. Before you can begin the synchronization process, you must define settings such as the Windows domain for log on.

Performing an Initial Synchronization

The initial synchronization validates user credentials and creates a local database on the device that contains records related to each engineer. After the initial sync, users can perform full or partial synchronizations to keep the device up-to-date and send data back to QAD Enterprise Applications.

Viewing and Updating Calls

When calls are entered in Call Maintenance (11.1.1.1) in QAD Enterprise Applications, field personnel can launch QAD Mobile FS, synchronize with the server, and view a listing of the calls assigned to them and then drill down to see additional call detail. Calls of one line can also be created in the device.

The call listing is sorted by customer end user, service item, severity, call ID, call line number, service type, visit date, and call status. The field engineer can make limited updates to existing calls on the device and create new calls if necessary. They can reassign the engineer, reschedule visits, and modify call status, service items, and work codes. However, they cannot add call lines or change the call ID. See "Creating and Updating Calls" on page 10.

Reporting Call Activity

After the field work is completed, the engineer records the activity on the call. Reporting includes labor hours, expenses, inventory and service parts, parts returned, problem causes, and any relevant notes. The next time the field device is synchronized with the server, the call activity is reported back to QAD Enterprise Applications. See "Reporting Call Activities" on page 15.

Ordering Parts

Field engineers can also enter parts orders for required parts. When the device is synchronized with the server, the order is created in QAD Enterprise Applications. Service parts can be shipped to either the call end user address or to the field engineer; inventory parts can only be shipped to the field engineer. See "Ordering Parts" on page 23.

Synchronization Data Flow

Data may originate at either the SSM server or the field device. The synchronization process is initiated at the client device. It proceeds through the following steps:

1. Launch synchronization in the QAD Mobile FS application.
2. The user is authenticated for the current workspace.

   The user must be a valid user with proper access rights to the workspace (and associated domain) as configured in the MFS Workspace Configuration utility.
3. Send new or updated calls, call activity reports (CARs), and parts orders from the device to SSM.

   Each record on the device is checked and sent or resent if one or more fields have changed on the record.

   The import of data into QAD Enterprise Applications is accomplished using QAD QXI.
4. Process records from device on the SSM server.

   Record ID numbers are changed or accepted:

   - Temporary ID numbers may be given to calls and parts orders created on the field device based on implementation setup. When these records are synchronized, they are given permanent ID numbers in SSM. If they are synchronized back to the device—for example, when the call remains assigned to the originating field engineer—the permanent ID appears on the device and cannot be modified.
   - When permanent ID numbers are given on the device, these are accepted as is in SSM.

   Time zones are entered:

- If multiple time zones (MTZ) is turned on in SSM, data is entered in the device end user's time zone and displays in that time zone on the device and in QAD Enterprise Applications after synchronization.

5. Send new and updated calls or orders from SSM to the device. CARs are not sent from SSM to the device.

   The calls and orders to be synchronized are determined by server-side change detection programs. Transactional data related to service activity is assumed to be more reliable in the field device and this data is left on the device as-is. The export of data from SSM is accomplished through QXI Service API.

6. Update the device database.

   Calls are deleted from the device database if:

   - The status is cancel, complete, close, or hold.
   - The call is reassigned to another engineer.

   Calls are updated:

   - With new calls originating in SSM assigned to the field engineer
   - With new call information
   - With the permanent call ID for calls originating on the device when temporary IDs are assigned
   - With service item coverage information (if no service item change occurred on the device call)

   Parts orders are deleted if:

   - All quantities are consumed in call activity recording.
   - The associated call is reassigned to another engineer.

   Parts orders are updated:

   - With new orders originating in SSM assigned to the field engineer
   - With new order information
   - With the permanent order ID for orders originating on the device when temporary IDs are assigned.

Chapter 2

Using QAD Mobile FS

This chapter explains how to use the QAD Mobile FS product on a field device, and details the process flows that occur under each sequence of device interfaces. The administration functions to set up QAD Mobile FS for use are discussed in *Installation Guide: QAD Mobile Field Service*. The chapter covers the functions that are used on a daily basis.

Navigating the QAD Mobile FS User Interface

The focal component of QAD Mobile FS is the device user interface.

There are six basic scenarios in using QAD Mobile FS:

- Synchronizing QAD Mobile FS
- Reviewing, creating, and updating calls
- Reporting call activity
- Ordering parts
- Viewing inventory and installed base items
- Administering QAD Mobile FS

The information that displays on your device is affected by general settings and settings associated with your user ID in QAD Mobile User Maintenance (11.1.12.1) in QAD Enterprise Applications. These settings affect the following aspects of a call:

- Whether you see status and work code details related to the call header or call lines
- Whether you can enter item and end user IDs that do not exist in the device database
- Whether temporary or permanent IDs are given to new calls and parts orders
- How various item lists on the device are generated

See Setting Up QAD Mobile FS User Accounts in *Installation Guide: QAD Mobile Field Service*.

The QAD Mobile FS user interface is designed to be easy to use and navigate. This section describes special features that make it easier to find and enter data.

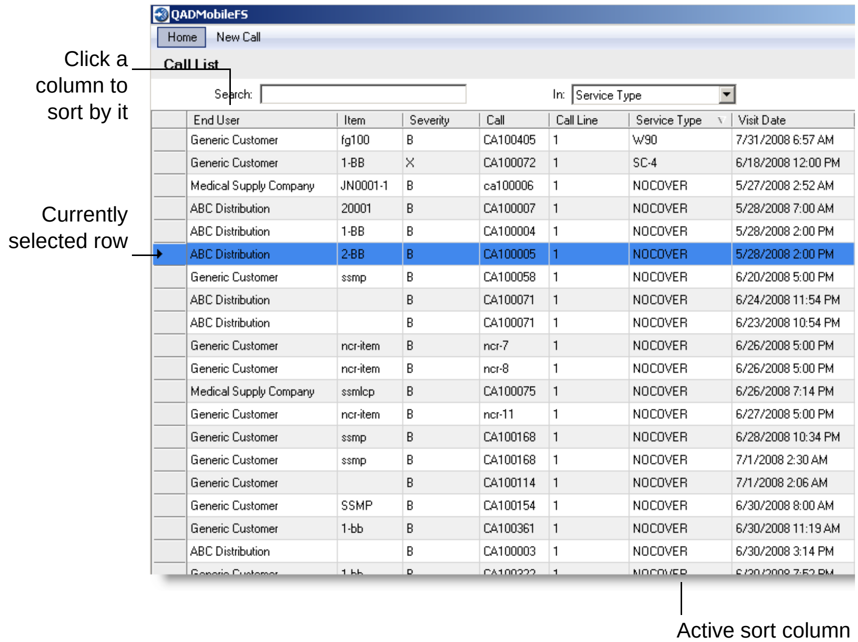
Working with Lists

Most screens in QAD Mobile FS provide lists for selecting records. The following lists share common features, described here.

- Call List
- Parts Order List
- Call Activity List
- Inventory List
- End User List
- Installed Base List
- End User Lookup
- Item Lookup
- Parts Grid in Call Activity
- Return Grid in Call Activity

Figure 2.1 illustrates a typical list.

Fig. 2.1
Using Lists



Sorting

Most lists have Search and In fields. The drop-down list associated with the field labeled In lets you select the column for data sorting. The first time you select a column heading, sort is in ascending order. Selecting the same heading again sorts in descending order.

You can also click in the header of any column to sort the rows based on the values of that column. The column displayed in the In field is updated to reflect the active sort.

Searching

Any text you enter in the Search field acts on the currently active sort column. Entering text in the Search field repositions the list at the record starting with that text value. The Arrow in the left column indicates the active row.

You can also search for records that contain a value by preceding the value with a wildcard (*). For example, entering *cr finds Monterey Credit Union and Creative Studios.

Resizing Columns

To resize a column, select the boundary on either side of the column heading and drag it until the column is the width you want.

Using Lookups

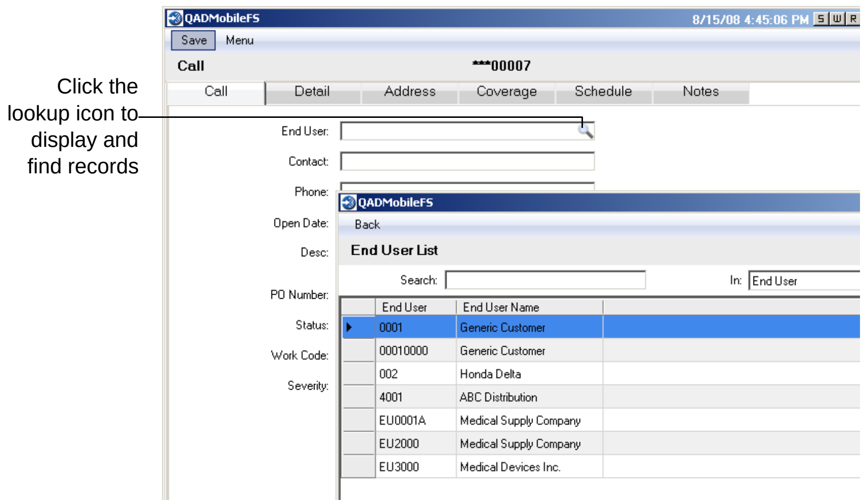
Some fields have a lookup icon. Clicking this icon displays a list with similar features to other lists. You can search and sort to find an appropriate record.

Adding and Deleting Records

To add a new record in the Parts and Return grids in Call Activity, click the grid and then choose Add from the menu.

To delete an existing record in the Parts and Return grids in Call Activity, select the record and press the Delete key.

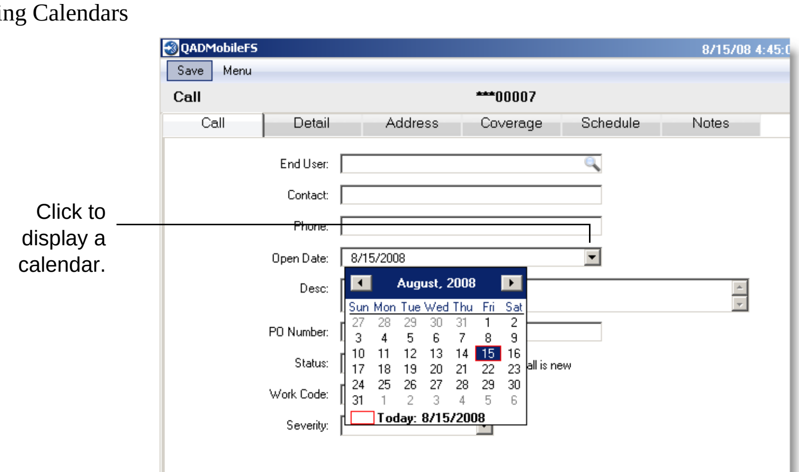
Fig. 2.2
Using Lookups



Working with Dates

Date fields include a drop-down list icon. Clicking the icon displays a calendar for selecting dates. You can also use the up and down arrows on the keyboard to increment the value in date fields.

Fig. 2.3
Using Calendars



Synchronizing QAD Mobile FS

Synchronization is the process of transferring new and changed data from the field device to QAD Enterprise Applications, and transferring new and changed data from QAD Enterprise Applications to the field device.

Synchronization should be done before the field engineer schedules the next period of work. The process requires that the device have network, USB, or wireless access to the synchronization server.

Both full and partial synchronization are supported. During a full synchronization, all data required on the device is updated. The partial (quick) synchronization is based on change detection on the server side and only changed data since the last synchronization will be transferred to the client. After an initial full synchronization, you can use the quick sync on a regular basis to see the calls assigned to you and the status of items you have ordered. You may want to do a full sync over weekends.

Follow these steps to complete a synchronization:

1. On the device, click the QAD Mobile FS icon. The Main QAD Mobile FS menu displays.
2. At the bottom of the QAD Mobile Field Service screen, select the workspace you want to work in. Your accessible workspaces are maintained in the MFS Workspace Configuration utility and your selected workspace determines which QAD Enterprise Applications domain you can synchronize with.
3. Select Full or Quick from the drop-down list:
   - Full synchronization updates all data on the device.
   - Quick synchronization updates only the data changed since the last synchronization.
4. Click the Synchronize button to begin the process.

5. The server log-in screen displays. Enter your user ID and password; then click OK.

The user is authenticated on the server and the synchronization process starts. See “Synchronization Data Flow” on page 3 for more detail.

The process can take 1 to 5 minutes or more depending on the amount of data to transfer and the number of concurrent users on the synchronization server.

6 After synchronization is complete, a status screen displays indicating success or failure. If there are errors, click View Log to view the synchronization log.

Creating and Updating Calls

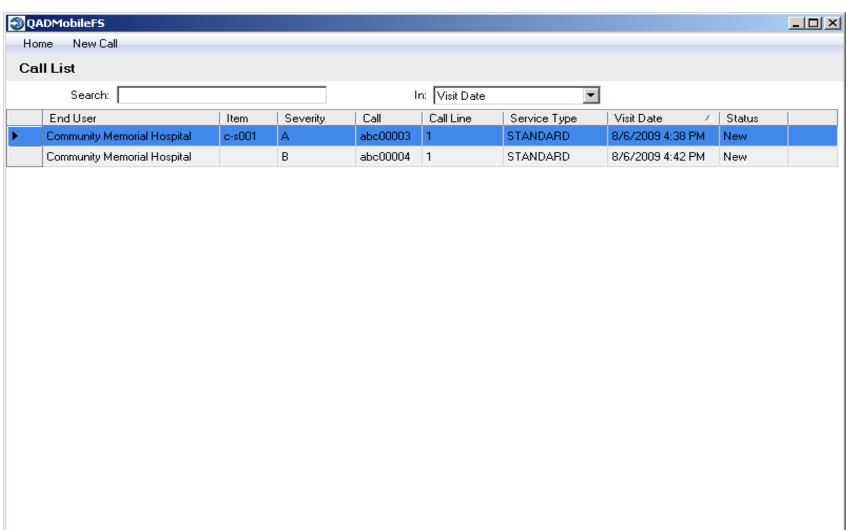
The outstanding call list lets field engineers review a list of scheduled call visits assigned to them and obtain detailed information about each line. This includes the end user address, service coverage detail, call information, item detail, and call comments (notes). Some data fields can be updated for an existing call; others are display only.

You can also create new calls on the device. When creating a new call, you can create only a single call line. This is unlike a call created in QAD Enterprise Applications, which can include multiple call lines with different detail information.

When you synchronize call lines created on your field device and assigned to yourself to QAD Enterprise Applications, visits are automatically created for these calls and assigned to you in SSM, regardless of whether Auto Create Visit is set to Yes or No in Engineer Scheduling Control in SSM.

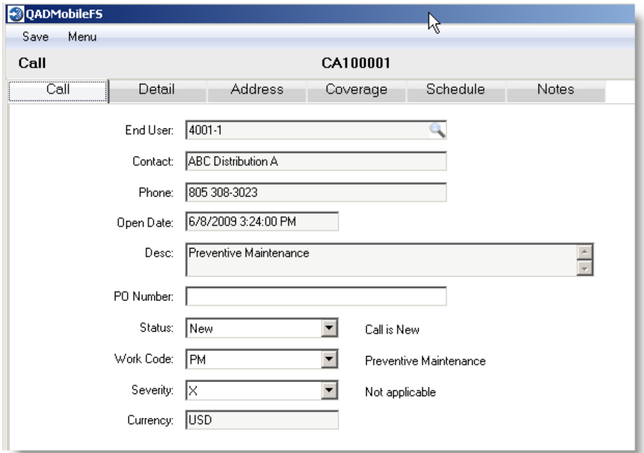
When calls are synchronized from QAD Enterprise Applications onto the device, only call lines with visits scheduled and assigned to your engineer code display. Calls with the Closed, Complete, or Hold status are not synchronized.

1 From the QAD Mobile FS main menu, click Call List. The list of call visits assigned to the field engineer displays by call line in the upper frame.



2 Select a call line from the list to access the call line information or choose New Call from the menu to create a new single-line call. Detail tabs appear at the top of the screen. Which fields you can edit depend on whether you are creating a new call or editing an existing one. The following screen illustrates editing an existing call.

See “Reporting Call Activities” on page 15 for information on reporting call activity from this form.



When you create a new call, the system generates either a temporary or permanent ID based on the setting of Generate Doc IDs on Client in QAD MFS Control.

- If this is No, the call is assigned a temporary number starting with three asterisks (***) and followed by the five-digit sequence specified in the Admin Settings field Next Call/MO ID. After a call has been synchronized, it receives a permanent ID from QAD Enterprise Applications.
- If this is Yes, it is given a permanent ID prefixed with the value of Call/MO Unique Prefix defined in QAD MFS Control in QAD Enterprise Applications. See Configuring QAD Mobile FS Control Settings in *Installation Guide: QAD Mobile Field Service*.

You can record activity for calls only when they have a permanent ID.

3 For a new call, update the following fields; they are display only for an existing call:

End User. Enter an end user ID or select an end user to associate with the call from the lookup. End users display sorted by name. Use the search and sort features to find the record you want.

Note If Nonexisting End User is Yes in QAD MFS Control, the field is not validated; you can enter an ID that does not exist on your device.

Contact and Phone. Specify the individual at the end user address to contact regarding this call and a phone number where this individual can be reached.

Open Date. This defaults to the current system date, but you can modify it, for example, when you are recording a call taken on an earlier date. The system uses the call open date to determine valid coverage sources (warranty or contract), price lists, and service BOMs and routings. This field is required.

Desc. Enter a brief description of the call to display on reports and inquiries.

4 For a new or existing call, modify values for the following fields:

PO Number. This field is required if the end user associated with the call requires a PO number. If so, you must enter a valid customer PO number.

Status. Select a valid status code from the drop-down list. If you select a status that equates with cancel or hold in QAD Enterprise Applications, this call is removed from the device during the next synchronization. You cannot change the status to the close or complete status. For a new call, status defaults to the call open status, as defined in QAD Enterprise Applications in Call Management Control (11.1.24).

Note The setting of Prioritize Call Header on Client in QAD MFS Control determines whether this field value reflects the call header or the call line.

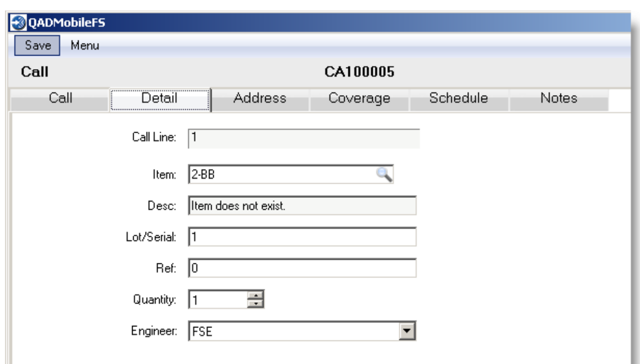
Note If the engineer is assigned to the call line, the status field can be updated. If the engineer is not on the call line, but only has a visit scheduled for the call, the status field cannot be updated.

Work Code. The work code records the type of work performed and how the work is billed. Select a valid work code from the list. Work Codes are defined in Work Code Maintenance (11.21.1).

Note The setting of Prioritize Call Header on Client in QAD MFS Control determines whether this field value reflects the call header or the call line.

Severity. Select a valid severity code from the drop-down list. Severity codes are defined as generalized codes in Generalized Codes Maintenance (36.2.13) for field ca_severity.

5 Click the Detail tab to view call line information. Item and quantity can be modified only when a call activity report is not associated with the call line on the device and the call status is not hold or cancel.



Item. Enter an item number or select a valid item from the lookup.

The lookup lets you toggle between viewing items in the end user's installed base and item master records.

- If you display items, the lookup shows the item master records on your device. This is created when you sync the device based on information associated with your record in QAD Mobile User Maintenance (11.1.12.1).
- If you display installed base items, you initially see all the top-level items in the end user's installed base. If an item has been added to the installed base with a product structure, selecting it from the lookup displays all of the lower-level items in the structure. You can select either the parent item or a lower-level item for this call line detail.

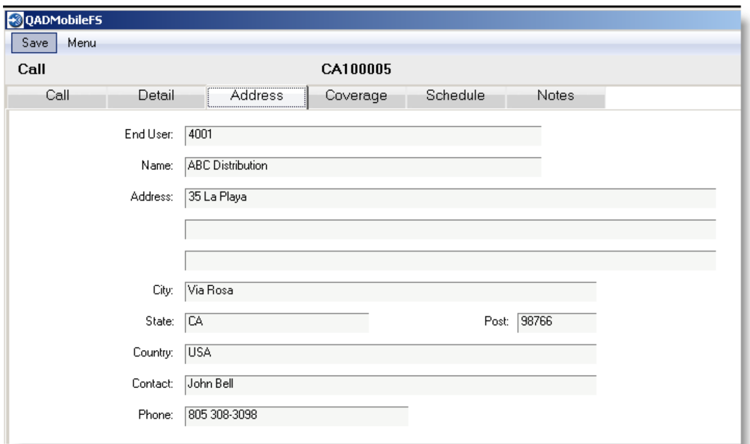
Note If Nonexisting Item is Yes in QAD MFS Control, the field is not validated; you can also enter an item number that does not exist on your device.

6 Complete the call line detail by filling in the remaining fields.

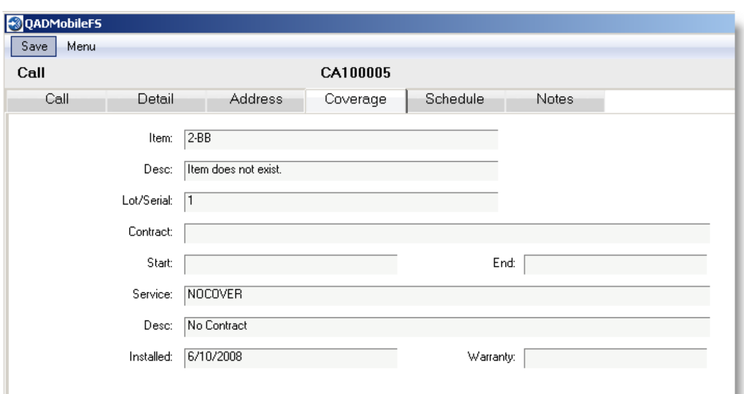
Quantity. Enter or scroll to the quantity required. For a serial-number controlled item, quantity must be 1.

Engineer. For existing and new calls, this field displays your field engineer code by default. If you change this value, both the call and its associated visit are reassigned during the next synchronization and deleted from your device.

7 Click the Address tab to view the end-user address information.



8 For existing calls, click the Coverage tab to review contract or warranty details.



For a new call, this tab is blank until after synchronization occurs.

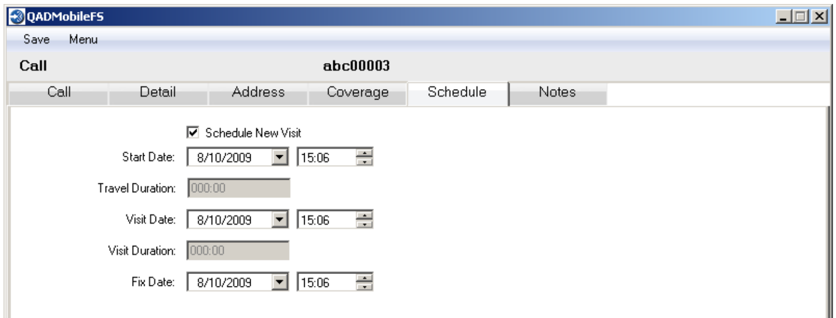
9 Click the Schedule tab to reschedule your visits.

If you reschedule your visits, changes will be synchronized back to SSM and update the visits data.

Note You can create a visit in several ways:

- Manually create a visit using Field Service Scheduler or Engineer Assignment Maintenance in SSM.
- With Auto Create Visit set to Yes in Engineer Scheduling Control, create a visit using Call Maintenance in SSM. A visit is automatically scheduled for that call.
- Create a call on your field device. When it is synchronized to QAD Enterprise Applications, a visit is automatically created for that call regardless of whether Auto Create Visit is set to Yes or No in Engineer Scheduling Control.

Note This function is not intended as a way for you to record actual time spent on a call. It is a planning function that creates records used by engineer scheduling to determine who is the best candidate for taking a call on a particular day and time in the future.



Schedule New Visit. This option is displayed when no visit is available for the current call assigned to you. By default, this option is not selected and all the other fields under the Schedule tab are disabled. Select this option to enable the scheduling fields to create a new visit for the call.

Start Date. Specify when you are scheduled to set out for the customer's location. For a new record, this defaults to the current date. For synchronized data, this value is calculated as visit date less travel duration.

Note This field only displays on the client for reference and is not synchronized with any corresponding data in SSM.

Start Time. Specify the time of day you are scheduled to set out for the customer's site. For a new record, this defaults to the current system time. For synchronized data, this value is calculated as visit time less travel duration.

Note This field only displays on the client for reference and is not synchronized with any corresponding data in SSM.

Travel Duration. Displays the amount of time it takes for an engineer to travel from the service center to this end user location. (Read-only.)

Visit Date. Specify the time of day that you are scheduled to begin work on this call. For a new record, this defaults to the current date. For existing data, this value is synchronized with visit start date or next call status date in SSM.

Visit Time. Specify the hour of day that you are scheduled to begin work on this call. For a new record, this defaults to the current system time. For existing data, this value is synchronized with visit start time or next call status date in SSM.

Visit Duration. Displays the estimated number of hours to be spent on this call transaction. (Read-only.)

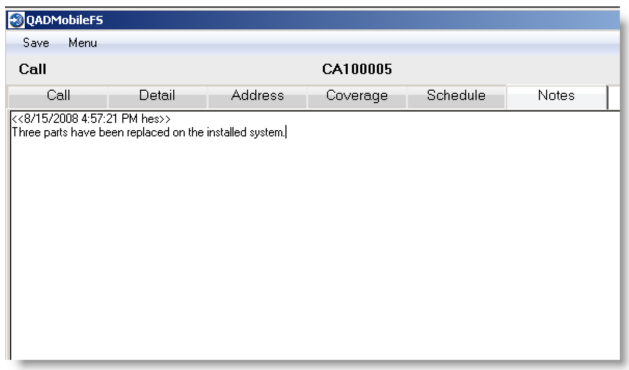
Fix Date. Specify when you are scheduled to solve the call problem. For a new record, this defaults to the current date. For synchronized data, this value is calculated as visit date plus visit duration.

Note This field only displays on the client for reference and is not synchronized with any corresponding data in SSM.

Fix Time. Specify the hour of day you are scheduled to solve the call problem. For a new record, this defaults to the current system time. For synchronized data, this value is calculated as visit time plus visit duration.

Note This field only displays on the client for reference and is not synchronized with any corresponding data in SSM.

10 Click the Notes tab to enter new comments or review existing comments for this call. You cannot modify comments that have been synchronized.



- For unsynchronized calls, enter new comments as needed.
- For synchronized calls, any existing comments display. Click the Update button to add new comments. After you save the comments, they can no longer be modified.

Any new comments are added as a new page in QAD Enterprise Applications when the call is synchronized.

Note When you click Update, its label changes to Show All. After entering your comments, click Show All to view any pre-existing comments in addition to any comments you just entered.

If you are creating a new call, the system automatically adds a comment indicating that the call was generated from QAD Mobile FS and places it at the beginning of other comments or on its own page depending on the setting of Print System Comments on Invoices/Reports in QAD MFS Control.

11 Choose Save to save and exit the call line. You return to the call list.

12 To cancel call updates or to delete a call, choose the Edit menu from any call screen. Choose Cancel to cancel or Delete to delete the call. Only unsynchronized calls can be deleted. You can cancel updates to both synchronized and unsynchronized calls.

Note You can also cancel by clicking on the window close button and responding Yes when prompted to cancel changes.

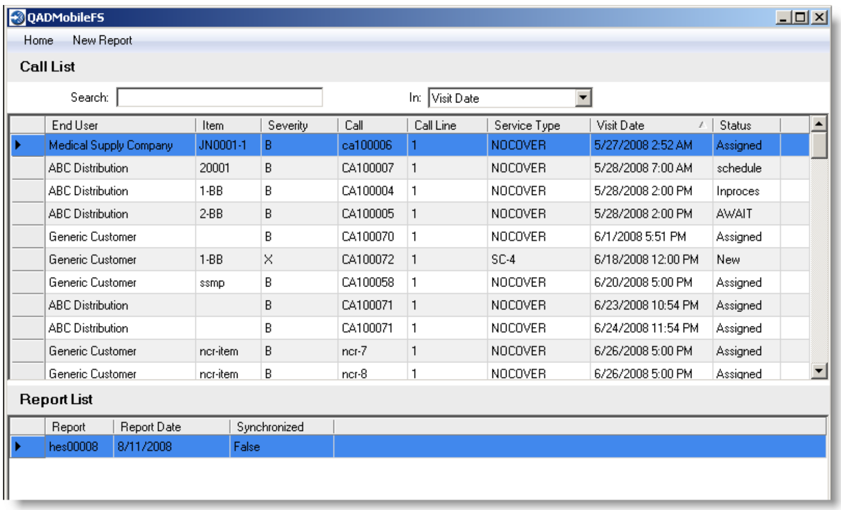
Reporting Call Activities

You can access call reporting from the main menu by clicking Call Activity and selecting a call visit line to report against. You can also choose Call Activity from the GoTo menu in the call maintenance screens. The following instructions assume that you started from the main menu, which displays all calls. The GoTo option displays only the current call line, but uses the same screens for modifications.

Note Synchronized call activity reports (CARs) are view-only: no changes are allowed.

1 From the QAD Mobile FS main menu, click Call Activity. At the top of the pane, a list of call lines currently assigned to you displays.

2 Select a call line from the Call List. If any activity reports exist for the line, they display in the lower Report List.

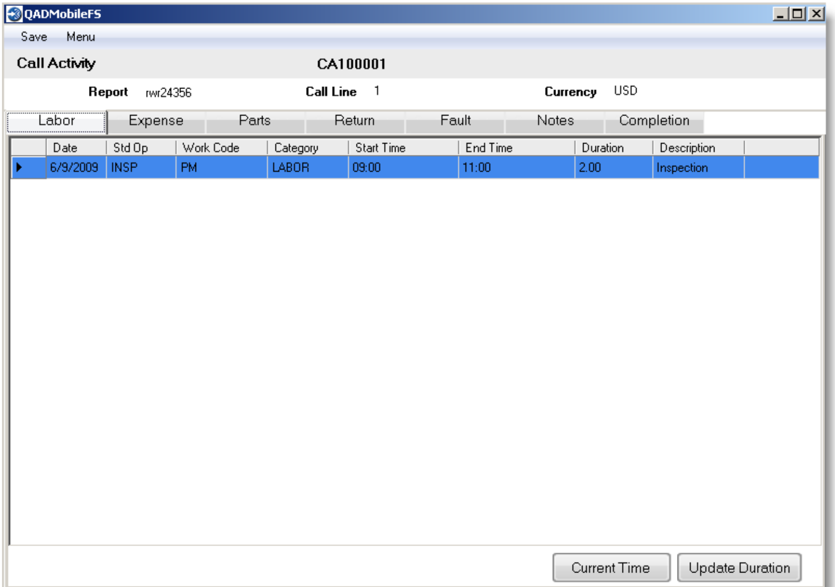


Call activity cannot be reported against calls with a cancel or hold status. It is also not allowed if the call's end user requires a purchase order number and none has been specified.

You can only report activity for new, unsynchronized calls created on the device when Generate Doc IDs on Client is Yes in QAD MFS Control.

The report number is generated from the Next Activity Report ID field, defined in the Settings form on the Admin menu combined with the Engineer Unique ID value defined in QAD MFS Control in QAD Enterprise Applications.

3 Select a call line and then either select an existing call report from the list to edit or choose Call Activity Report from the New menu to create a new report. The Labor tab displays.



Date. This field defaults to the system date; change it to the correct date when the labor activity occurred if necessary. Click the drop-down to display a calendar for selecting dates.

Std Op. Optionally specify a standard operation code defined with Service Std Operation Maint (11.19.21) in QAD Enterprise Applications. If specified, the system displays the associated service category and description.

After you record a line, you can change the operation only by deleting the line and reentering it.

Work Code. This field defaults from the selected call line; you can change it if needed. Work code affects coverage and pricing.

Category. Select a labor service category from the drop-down list. For standard operations and operations in service routings, the service category defaults from the operation.

Start Time and End Time. Specify the time of day you began and finished the work. These values default to 12 AM. Click Current Time to update a field with the current time.

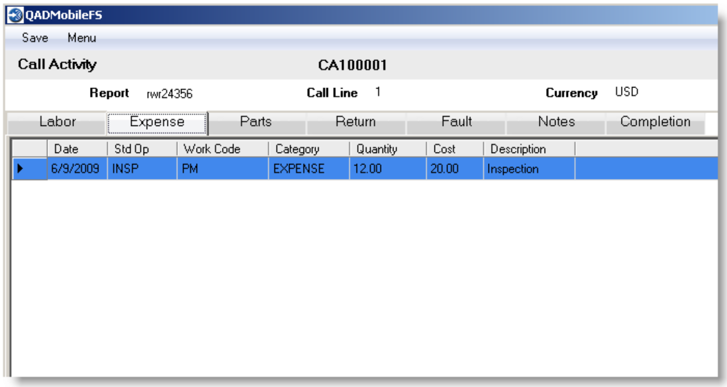
Duration. Manually enter the number of hours worked or click Update Duration to populate this field based on the start and end times entered.

Description. Specify a brief description of this operation to print on the customer invoice. Description defaults from a standard operation if specified.

Select the Start Time or End Time field you want to edit and then click the Current Time button to insert the current system time.

Click the Update Duration button to automatically update the duration field for the record you are editing by calculating the time difference between start time and end time.

4. Click Expense to enter expenses for the call.

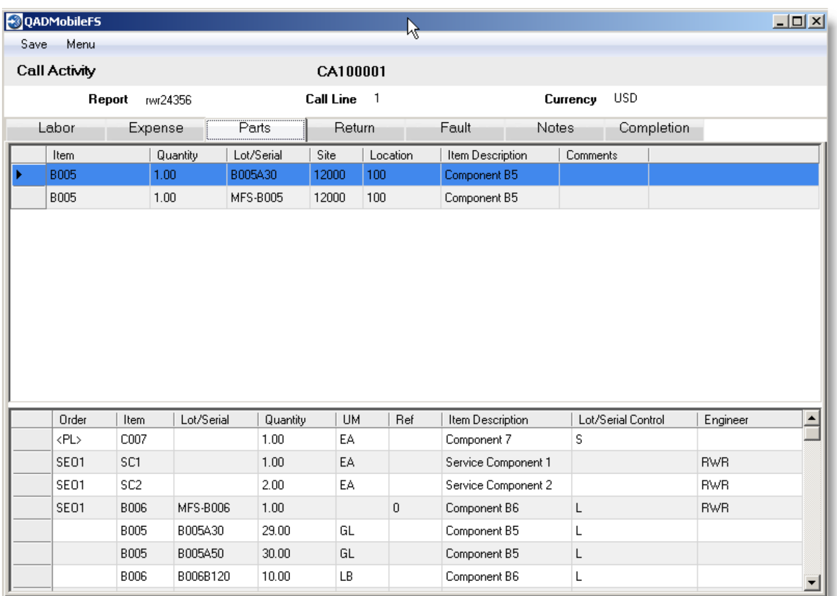


The Expense tab is similar to the Labor tab and the fields are the same, except that for expenses you enter a quantity and cost.

Quantity. Enter the number of units of the service category that you used. This defaults from the standard operation, if one is specified.

Cost. Specify the cost of 1 unit of the service category.

5 Click the Parts tab to enter the items used for this call line.



The bottom grid displays:

- Inventory detail records for items found in the site and location associated with your record in QAD Mobile User Maintenance
- Inventory detail for items ordered on parts orders for the call line. Items from parts orders display a value in the Order column.
- Inventory detail for parts defined for this call maintained in Parts List Maintenance, indicated by <PL> in the Order column.

When you select a row in the bottom grid, it is added to the top grid with a quantity of 0, unless only a single item exists; then quantity defaults to 1. You can then edit quantity, site, and location in the upper grid. Quantity can be greater than the quantity available.

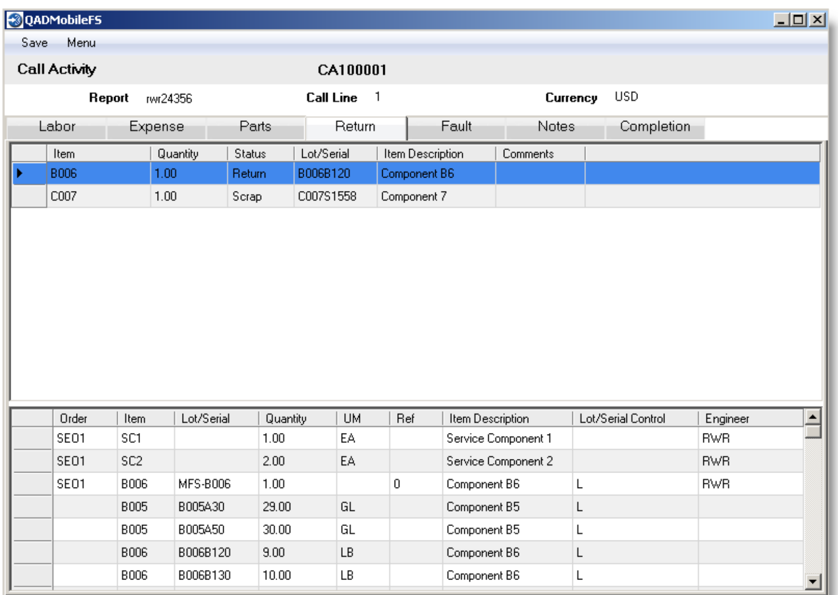
Note When you add an MO item to the parts order list, the system displays a warning if the engineer code associated with the MO item does not match your own engineer code. The usage site and location of an MO item default from the MO ship-to site and location.

You can also click the Item field in the upper grid on the blank line to open a drop-down list of all item master records on your device. Select an item and then update quantity, lot/serial, site, and location.

Note If Nonexisting Item is Yes in QAD MFS Control, the field is not validated; you can also enter an item number that does not exist on your device.

You can enter up to 32 characters of comments on an item. The comments will be appended to the CAR notes under the Notes tab, which will be added to the call comments when the report is synchronized to the server.

6 Click the Return tab to enter information on returned items.



The bottom grid displays items that are available to be returned for this call, including:

- Inventory detail records found in the site and location associated with your record in QAD Mobile User Maintenance.
- Items ordered on parts orders for the call line. Items from parts orders display a value in the Order column
- Items in the end-user's installed base. These display with <ISB> in the Order column.

When you select a row in the bottom grid, it is added to the top grid with a quantity of 0, unless only a single item exists; then quantity defaults to 1. You can then edit quantity, site, and location in the upper grid. Quantity must be a positive, numeric value and can be greater than the quantity available.

Note When you add an MO item to the returned items list, the system displays a warning if the engineer code associated with the MO item does not match your own engineer code. The return site and location of an MO item are determined based on its return status.

You can also click the Item field in the upper grid on the blank line to open a drop-down list of all item master records on your device. Select an item and then update quantity, status, lot/serial, and reference.

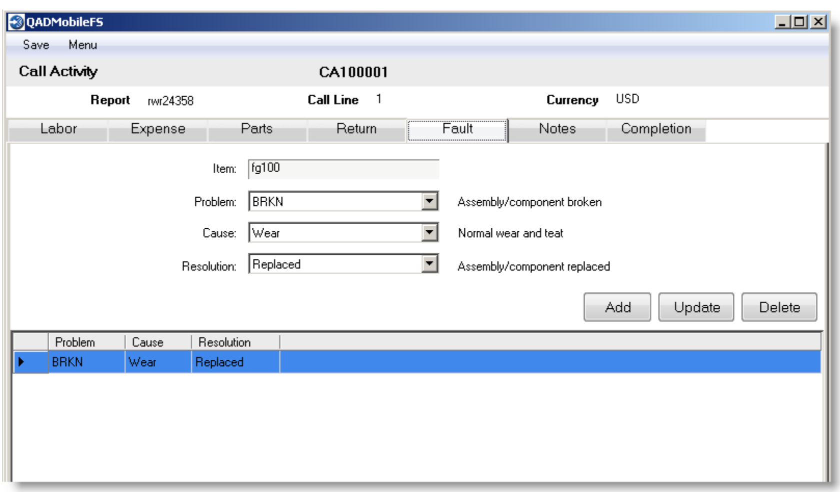
The return status is a required field, and there are a couple of rules to follow when you specify its value:

- You can use pending returns only for items on an MO. If you select the pending status for a non-MO item, a warning message will be displayed.
- Whether an item is repairable is defined in the QAD Enterprise Applications item master and can be viewed from the Item List on the QAD Mobile FS client.

  If you previously entered a repairable item in Parts, a return is automatically created with the same quantity and the default return status defined in SSM Control. If the item is lot-controlled, the same lot number is also used on the return.

You can enter up to 32 characters of comments on an item. The comments will be appended to the CAR notes under the Notes tab, which will be added to the call comments when the report is synchronized to the server.

7 Click the Fault tab to enter codes reflecting the specific failure and resolution for the item on the call line.

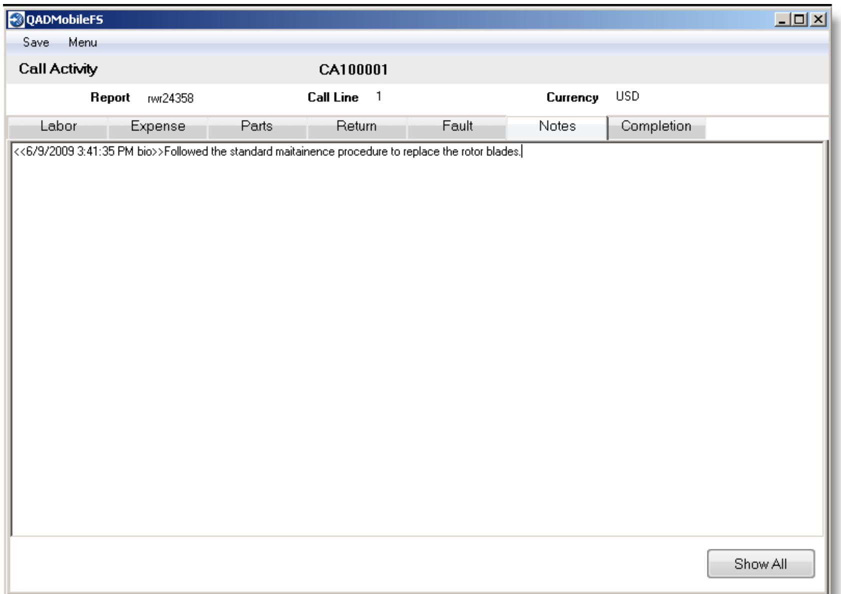


The item associated with the call line displays and cannot be edited. Select the Problem, Cause, and Resolution codes from the lists. This enables the Add button.

Click Add to add the fault codes to the item, as shown in the screen example. You can add multiple sets of fault codes for an item.

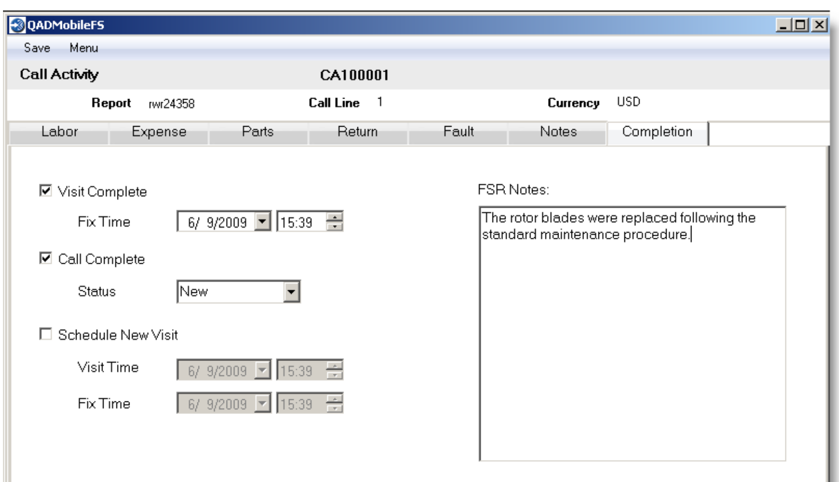
To modify or remove a set of fault codes, select a row in the lower grid and click Update or Delete.

8 Click the Notes tab to enter comments for the call.



These update the same comment records that are updated in the Call screen.

9 Click the Completion tab to close the visit and complete the call.



Visit Complete. Select this option to enable the Fix Time field for recording fix date and time and to close the current visit. The current call line will be closed and will be removed from your device after the next synchronization. If you clear this option, the report will not be synchronized and will remain on the client device.

Fix Date and Time. Enter the actual date and time when the call problem was solved. This field is only enabled when the Visit Complete option is selected.

Call Complete. Select this option to have the system try to complete the call line and the call.

Status. Specify the status to update the call line and the call to in either one of the following situations:

- The Call Complete option is not selected.

- The Call Complete option is selected but the system fails to complete the call line.

Schedule New Visit. Select this option to create a new visit. This option gives you flexibility when you want to close the current visit to the customer and complete the CAR, but still want to schedule another time to visit the customer.

Visit Time. Specify the date and time of your next visit. This field is only enabled when the Schedule New Visit option is selected.

Fix Time. Specify when you expect to close the next visit. This field is only enabled when the Schedule New Visit option is selected.

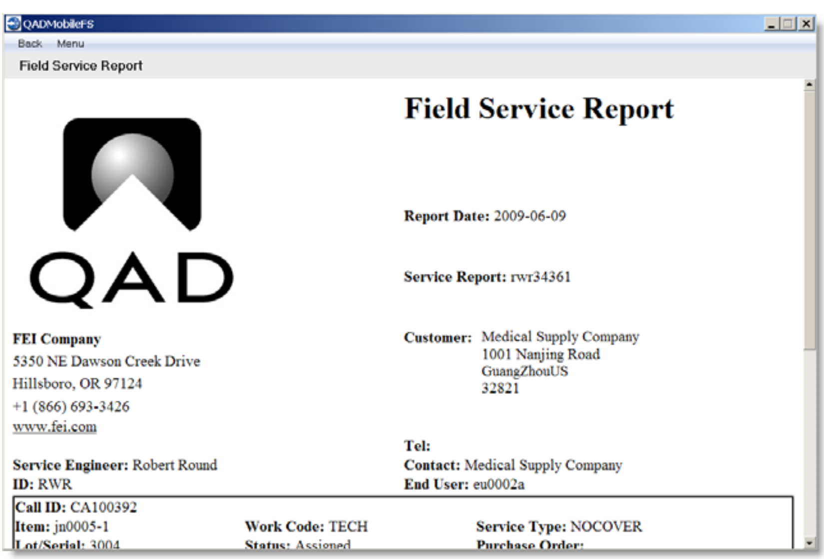
FSR Notes. Enter additional notes on the service performed. This information will be displayed on the FSR.

10 Choose Save to save and exit the CAR and return to the call list.

If you selected the Visit Complete option under the Completion tab, the Field Service Report will be generated and the call line status in the report will be set to complete. However, setting the call line status to complete on the client does not automatically do the same to the call line on the server. Several scenarios may occur after synchronization:

- If Process Call Reports is set to Yes in QAD MFS Control in SSM, SSM will automatically process the call line. If all the call line data is successfully processed, the call line status will be set to complete. If this is the case, all other visits originally scheduled for this call, if any, will be cancelled and removed from your client device.
- If Process Call Reports is set to No in QAD MFS Control in SSM, or if auto-processing is not successful, the call line will remain in its original status until it is manually processed on the server side. If this is the case, other visits scheduled for this call, if any, will still be synchronized to your client device.

Note You can always access the CAR and choose Generate FSR from the menu to generate the report.



- To collect the customer’s digital signature on the report as acknowledgement of the service received, choose Signature from the menu. In the Signature window, have the customer sign using a digital signature device; then click Save. The signature displays at the bottom of the field service report.

- To save the report as a pdf or mht file, choose Save as from the menu and then provide a file and choose a file format.
- To send out the report through e-mail, choose Mail from the menu. You are then prompted to save the report as a `.pdf` or `.mht` file, after which the default e-mail program on your system automatically launches and a new mail is created with the saved report as an attachment.
- Saved field service reports can be synchronized to SSM as call attachments and maintained in Attachment Maintenance.

  Once a field service report is synchronized to the server, it can no longer be edited or synchronized again on the client. You can select View FSR from the menu to view the report or select Generate FSR to regenerate the report.

11 To cancel CAR updates or to delete a CAR, choose the Edit menu from any CAR screen. Choose Cancel to cancel or Delete to delete the activity report.

Note You can also cancel by clicking on the window close button and responding Yes when prompted to cancel changes.

Ordering Parts

Parts can be ordered to complete activity for an SSM call. You can also order parts without referencing a call to replenish your general service inventory.

Note You can order parts only for calls that have been synchronized with QAD Enterprise Applications. A call created on the device and not yet synchronized is not available for selection.

When you create a new parts order, the system generates either a temporary or permanent ID based on the setting of Generate Doc IDs on Client in QAD MFS Control.

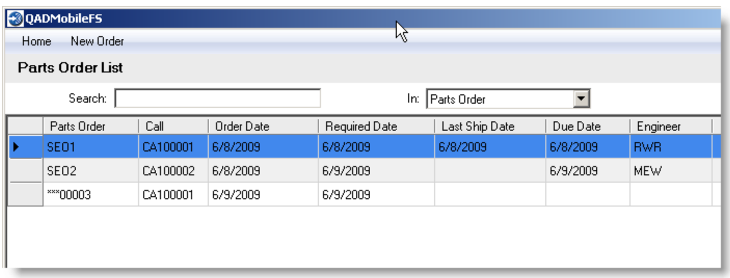
- If this is No, the parts order is assigned a temporary number starting with three asterisks (***) and followed by the five-digit sequence specified in the Admin Settings field Next Call/MO ID. After an order has been synchronized, it receives a permanent ID from QAD Enterprise Applications.
- If this is Yes, it is given a permanent ID prefixed with the value of Call/MO Unique Prefix defined in QAD MFS Control in QAD Enterprise Applications.

Parts orders can also be created on the QAD Enterprise Applications server; these are received on the device with permanent IDs. After a parts order is synchronized, you can no longer update the order data.

If Nonexisting Item is Yes in QAD MFS Control, you can order any item. Otherwise, items ordered on the device must exist in the device database. These items are synchronized from the QAD Enterprise Applications item master based on the range of service groups associated with your record in QAD Mobile User Maintenance.

For items not associated with calls, the delivery must be to the engineer. Items associated with calls can be delivered to the end user or the engineer.

1 From the QAD Mobile FS main menu, click Parts Order. The list of existing orders displays.

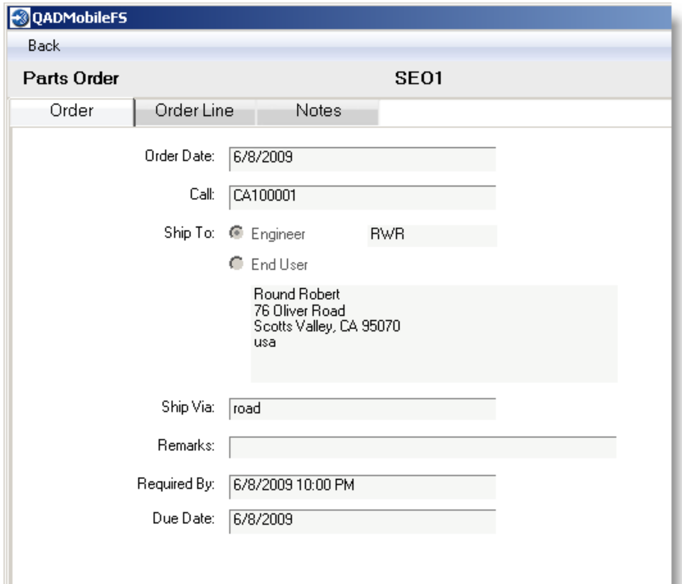


Three types of orders may appear:

- Orders entered in or synchronized from QAD Enterprise Applications. The parts order has been confirmed; the order ID is permanent, as indicated by the order prefix, such as MO038789. You cannot update data on these orders.
- Device orders for confirmed calls.
- Device orders for items not associated with a call.

2 Click an existing order to view or update it. To create a new order, choose New from the menu. The order header displays.

3 The parts order screen displays. Detail tabs appear at the top of the screen.



Order Date. Enter the date this order was created. This defaults to today's date. Click the drop-down arrow to display a calendar for selecting dates.

Call. Optional. Open the list to select from available calls.

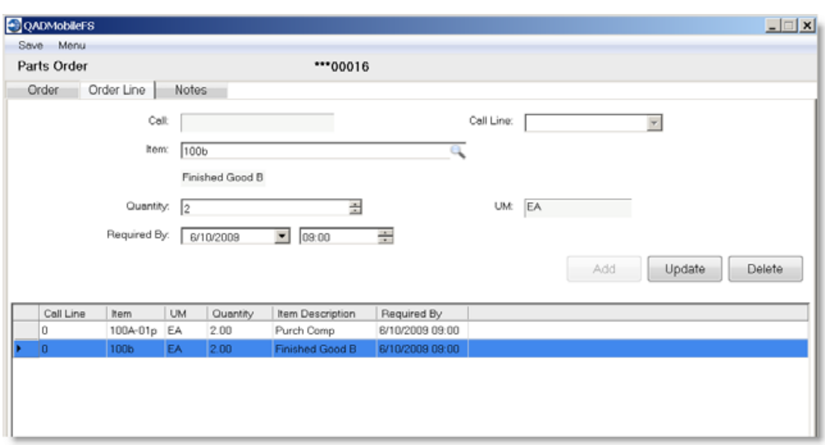
Ship-To. Select the ship-to location, either End User or Engineer. End User is not available for orders without a call.

Ship Via. Select the shipping method from the drop-down list.

Remarks. Optionally, type some remarks for the order.

Required By. Enter the date and time by which the item is needed. The default date is the current date; the default time is 09:00. Click the date field drop-down arrow to display a calendar for selecting dates. The values specified here default to order line required dates and time.

4 Click the Order Line tab to enter item detail.



Call Line. If this order is related to a call, specify the line on the call for which this item is required. When only one line exists on the call, the line number defaults; otherwise, you must select the line from the drop-down list. A parts order must contain at least one order line.

Item. Select the item you want to order from the lookup, which displays all item master records on your device.

Note If Nonexisting Item is Yes in QAD MFS Control, you can order any item, regardless of whether it exists in the device database.

Quantity. Specify how many of the item you need.

Required By. Enter the date and time by which the item is needed. These values default from the required date and time specified for the order. Click the date field drop-down arrow to display a calendar for selecting dates.

Click Add to add the item to the order. To modify an item or delete an item from the order, select the item from the order list and choose Update or Delete.

Important The lines on the order are not saved until you choose Save.

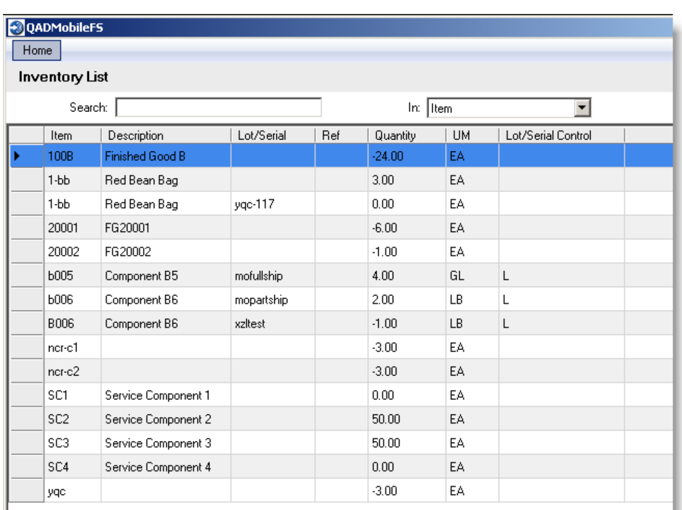
5. Click the Notes tab to enter comments on the order.
6. Choose Save to save the parts order and exit to the order list.
7. To delete a device parts order, return to the parts order list, select the order, and choose Edit| Delete from the menu. You are asked to confirm the delete. The order, all order lines, and any order comments are deleted.

   You cannot delete an order that has been synchronized.

Viewing Inventory

Each device contains an item inventory from QAD Enterprise Applications in the local database. The records that you view in this screen are synchronized from QAD Enterprise Applications based on the inventory detail associated with the site and location specified for your user record in QAD Mobile User Maintenance.

1. From the QAD Mobile FS main menu, click Inventory. The list of items displays.



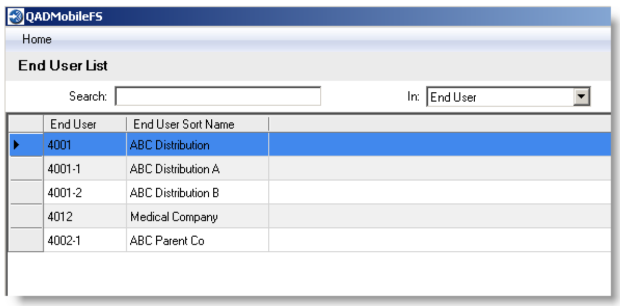
Item	Description	Lot/Serial	Ref	Quantity	UM	Lot/Serial Control
100B	Finished Good B			-24.00	EA	
1-bb	Red Bean Bag			3.00	EA	
1-bb	Red Bean Bag	yqc-117		0.00	EA	
20001	FG20001			-6.00	EA	
20002	FG20002			-1.00	EA	
b005	Component B5	mofullship		4.00	GL	L
b006	Component B6	mopartship		2.00	LB	L
B006	Component B6	xzltest		-1.00	LB	L
ncr-c1				-3.00	EA	
ncr-c2				-3.00	EA	
SC1	Service Component 1			0.00	EA	
SC2	Service Component 2			50.00	EA	
SC3	Service Component 3			50.00	EA	
SC4	Service Component 4			0.00	EA	
yqc				-3.00	EA	

Scroll across to view item detail. Scroll down to view additional items.

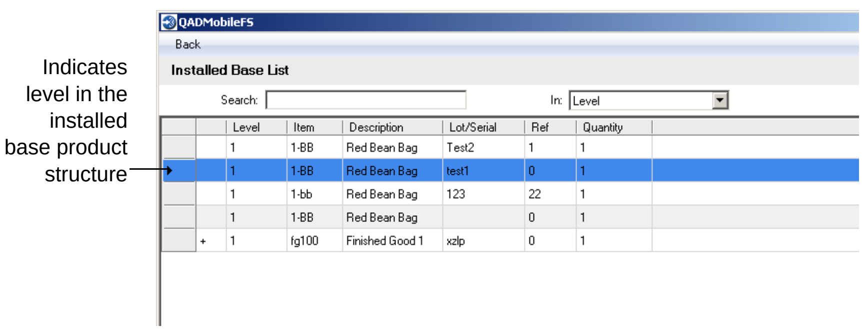
Viewing Installed Base Details

You can use QAD Mobile FS to view the items that have been purchased or installed by the end users you service. If the end item sold to the user was added to the end user's installed base with subcomponents, you can view this configuration detail also.

1 From the QAD Mobile FS main menu, click Installed Base. The list of end users displays.



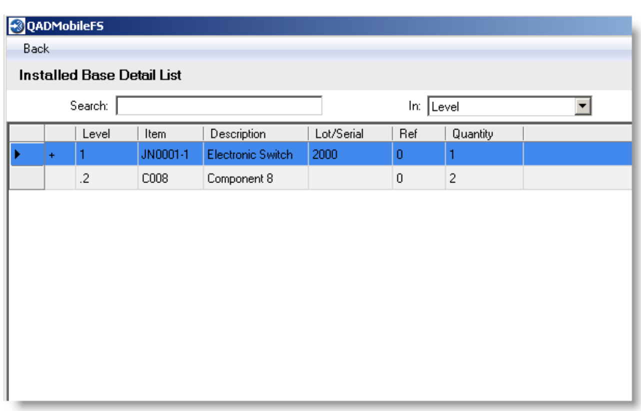
2 Select an end user to display the associated items.



The level column indicates the level in the installed base product structure that you are viewing. Level 1 items are top-level or parent items.

If an item has components in the installed base, selecting it displays details about them.

3 Click an item with subcomponents to display its details.



Level 2 items are immediately below the parent.

Index