

## Notes:

### Set-up on Host (Office) System

- Defining Mobile SERVICE MANAGER host email
- Configuring salesman table for mobile usage
- Setting the type of work for mobile dispatching
- Assigning and configuring a mobile unit
- Mobile orders audit report set-up

### Sending Orders to the Mobile Unit

- Sending single orders
- Data required on mobile orders
- Using the generate work orders function (batch processing)
- Sending to a single unit
- Understanding order selection
- Exporting of orders to email program
- Email process

### Receiving Mobile Unit Work Orders

- Confirm email files
- Retrieving orders from field
- Invoicing mobile orders
- Editing changes to mobile orders
- Processing new orders created in the field

### Truck Inventory

- Establishing a system in Service Manager
- Selecting items from part list
- Flagging items for truck inventory
- Customizing each mobile unit

### Mobile Unit Security

- Customizing security from host
- Mobile unit security
- Changing mobile unit security

# The Mobile SERVICE MANAGER Workshop

## cont'd

Note:

### Mobile Unit Set-up

- ☒☒ Selecting email options during install
- ☒☒ Receiving mobile orders from host

### Using Mobile Service Manager

- ☒☒ Tool Bar Icons
- ☒☒ Viewing work order details
- ☒☒ Adding material/labor
- ☒☒ Adding notes back to the office
- ☒☒ Capturing credit card information
- ☒☒ Capturing customer signature
- ☒☒ Adding additional services to an order
- ☒☒ Completing work orders
- ☒☒ Adding a new order
- ☒☒ Creating a repair work order

### Sending Mobile Orders to the Host

- ☒☒ Identifying completed orders
- ☒☒ Confirming email functions
- ☒☒ Sending orders to the host
- ☒☒ Resending orders to the host

### Using Outlook to Send and Receive Work Orders

- ☒☒ Connecting to Outlook
- ☒☒ Working with inbox, outbox & sent items
- ☒☒ Recognizing MSM message files
- ☒☒ Marking files as un-read
- ☒☒ Verifying email addresses
- ☒☒ Understanding how MSM manages email files

