

# Mobile FP



YOUR  
PROPERTY  
IS OUR  
PRIORITY



# Mobile FP

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## ***Making monitoring equipment fast and efficient.***

### **EQUIPMENT NEEDED FOR THIS PROCESS**

Each branch will be provided with the required amount of iPhones/iPad and Socketmobile (Bluetooth scanner) devices. If you require more iPhones or Socketmobile

Socketmobile: Bluetooth device to be able to scan the equipment (this device will be specific to the iPhone)

iPhone/iPad: needs FOS mobile app to be able to link to the scanner

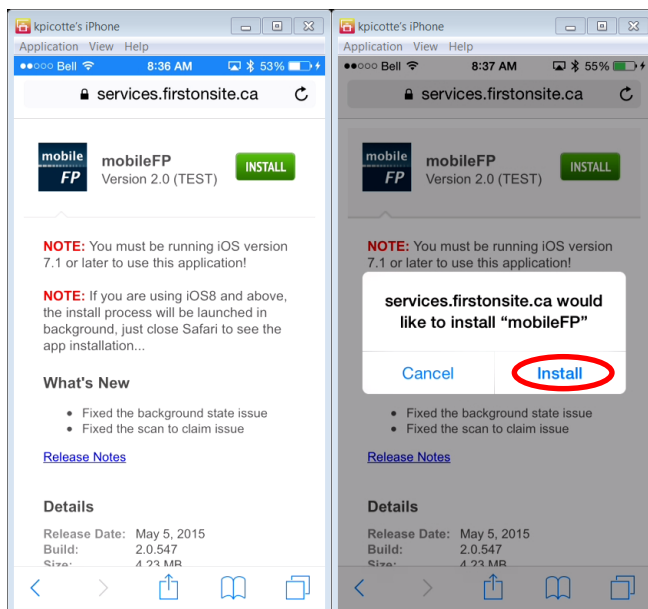
### **MOBILEFP SETUP**

#### **Installing the MobileFP application on your device:**

If you already have your iPhone/iPad, you will have to install the app on your device. Here's how you do it:

On your device tap the MobileFP installation link which you will have received via email. This will open Safari on your device. Next, tap the link and installation of MobileFP will begin in the background.

<https://services.firstonsite.ca/applications/mobileFP>

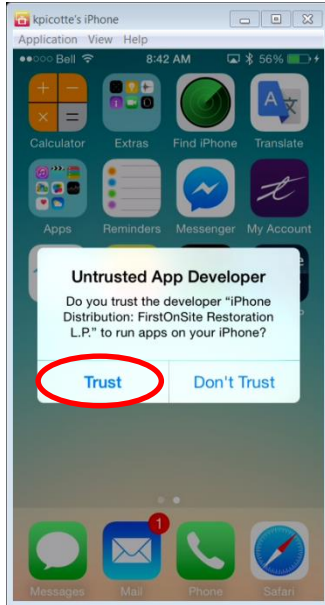


Tap the “Install” button, then close Safari by pressing the button at the bottom of your device. MobileFP will begin installation.

## Getting Started:

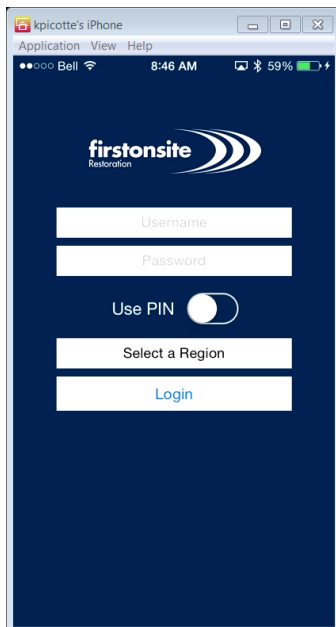


Open the app by tapping the



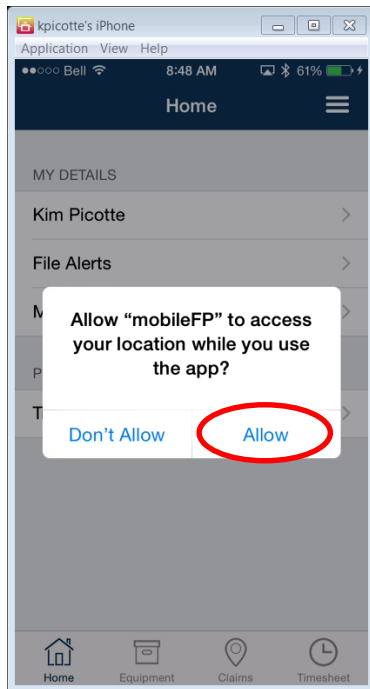
Tap **"Trust"** when this screen pops up

This will bring you to the following Login screen:



- Use the same "username" and "password" you would use to login to Claimtrak
- Select your Region, using the current region you are working in
- Leave the "Use PIN" feature turned off
- Tap **"Login"**

Once you have logged into the app the following screen will pop up



Tap **"Allow"** when the prompt for accessing location pops up.

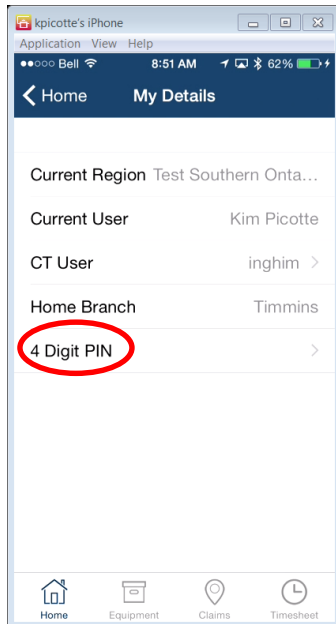
***\*\*Anytime MobileFP prompts you to allow access to something, you should select allow.\*\****

You are now on the MobileFP **"Home"** screen. This screen will be referred to as the Home screen throughout the rest of this document. It can be accessed at any time from within the app by simply tapping the **"Home"** icon in the bottom left corner of your screen.

## Setting Your 4-digit PIN

In order to speed up the login process, MobileFP has a 4 Digit Pin feature to allow users to bypass entering their full CT password.

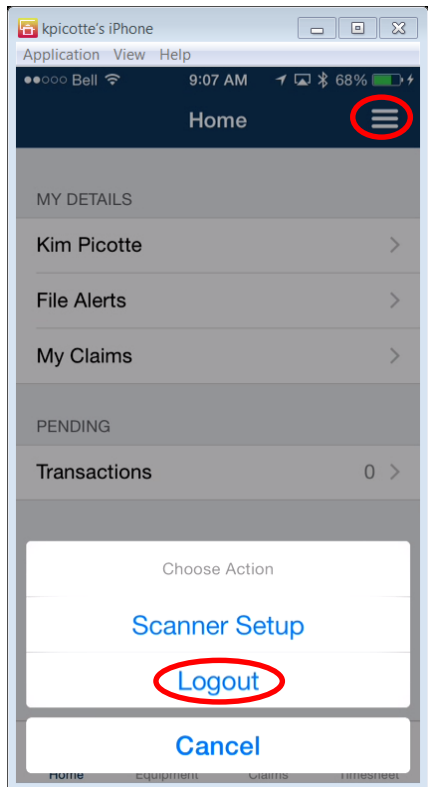
From the Home screen, tap your name at the top and the following screen will show.



Now tap **"4 Digit PIN"**, enter a 4 digit PIN twice when prompted on the screen. This 4 Digit PIN will become your MobileFP login.

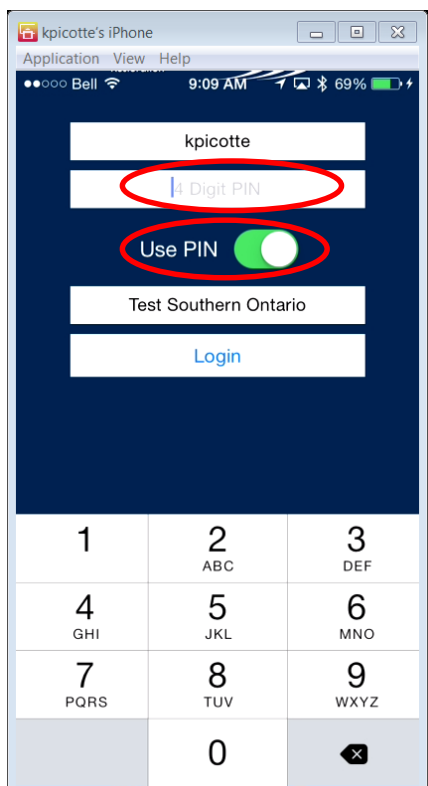
**You are responsible for all transactions completed under your Username, do not share password/PIN with other employees.**

Tap the “Home” icon in the bottom left corner to return to the home screen. You are now going to “Logout” so you can activate your 4 Digit Pin login.



Tap the “Menu” icon from the top right hand corner and tap “Logout” from the Action menu that comes up at the bottom. This will log you out of MobileFP and bring you back to the login Screen.

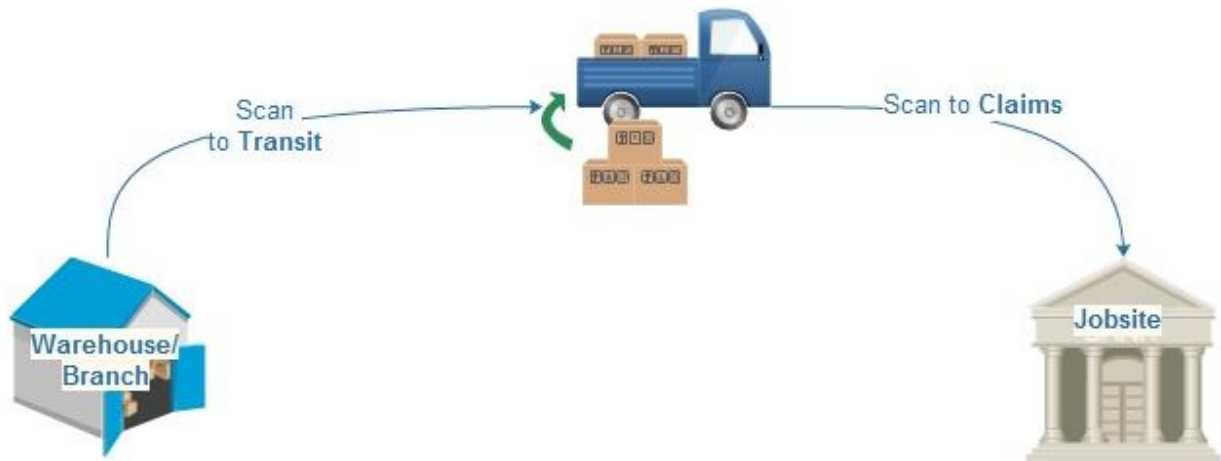
**\*\*This only needs to be done on the initial set up of your PIN\*\***



When you return to the Login screen, tap the toggle button next to “Use PIN”. It should turn green and your password will be erased. Tap the white box under your “username” to enter your 4 Digit Pin you created in the previous step. Then tap “Login” and your 4 Digit Pin will now be used to login to MobileFP.

## SCANNING EQUIPMENT

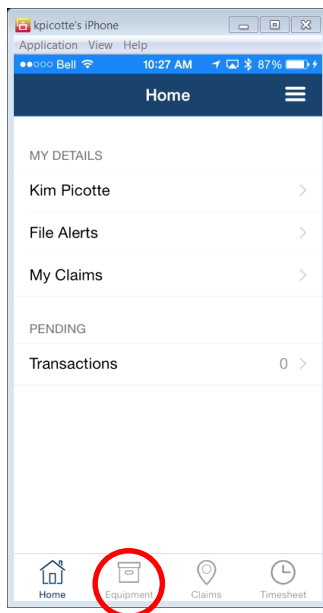
### Scanning Equipment to “In Transit” status



The “**In Transit**” status will be used when equipment is “on the truck”. For example, 10 pieces of equipment are being loaded to go to 3 different jobs. All 10 pieces would be scanned to “**In Transit**” status and then issued to the claim once they arrive at the jobsite.

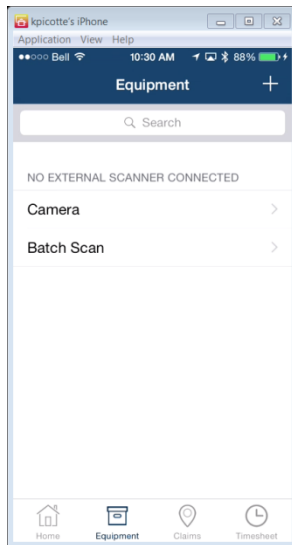
***\*\*“Transit” status should always be used when equipment is being taken to or removed from a job site.\*\****

From the Home screen, tap the “**Equipment**” icon on the bottom of the screen.





This will bring up the Equipment module where you will see 2 options, “**Camera**” and “**Batch Scan**”.



“**Camera**” will be used when dealing with equipment one item at a time.

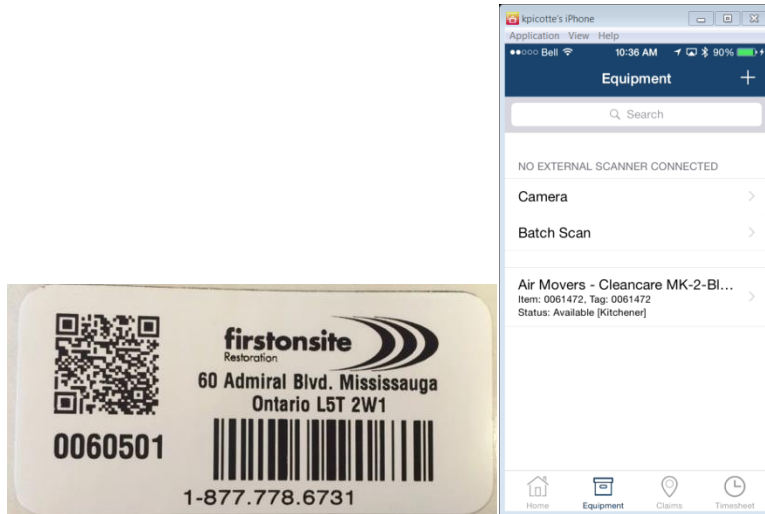
“**Batch Scan**” will be used when dealing with multiple pieces of equipment which are being scanned to the same status.

## CAMERA

Tap “Camera”.

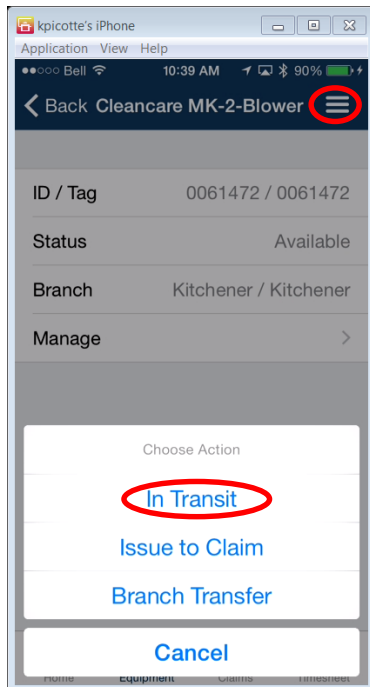
**\*\*If MobileFP prompts for access to your camera, select “Allow”. This will only happen on the first use.\*\***

MobileFP will then bring up your camera and you will aim the camera at the asset tag on the piece of equipment you are scanning. Your iPhone will make a “beep” noise when it has successfully scanned the item. The screen will then revert to the image below.

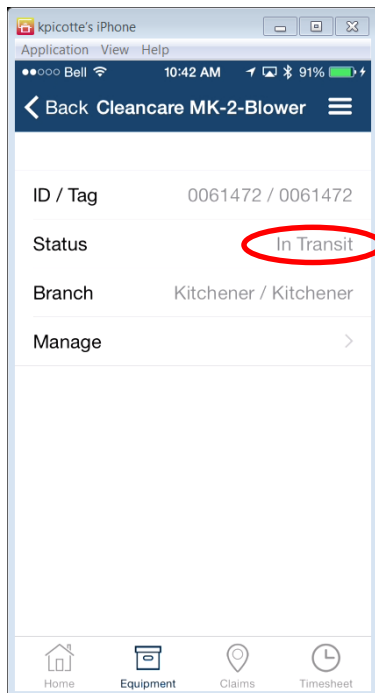


You will now be able to see the Item#, Tag# and the current Status of the equipment as well as the branch it is currently assigned to.

Tap on the piece of equipment to select it.



From the upper right hand corner tap the “**Menu**” icon. This will bring up a menu at the bottom which will allow you to put the item into a new status. Tap “**In Transit**”. A Warning will now pop up asking “**Are you sure want to change the status of this item?**” Tap “**Yes**”.



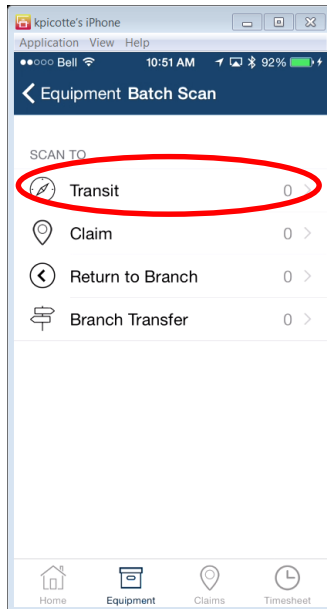
Note that the item has now changed to an **“In Transit”** status.

You should now place the item in your vehicle and proceed to the jobsite. For instructions on issuing equipment to a claim, please proceed to the section **“Scanning Equipment to “Claim” status”**.

## BATCH SCAN

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Tap “Batch Scan”.

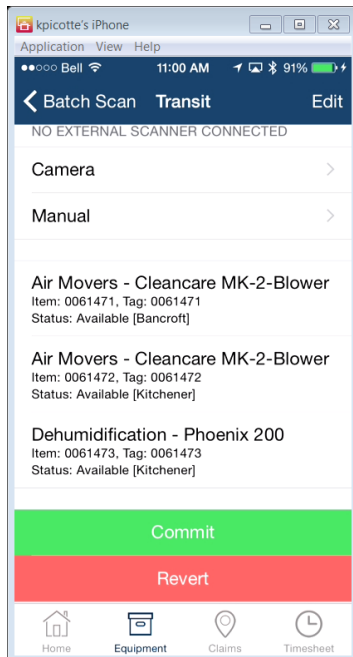


MobileFP will now prompt you to select a status that you wish to Batch Scan to. Tap “Transit”, and then select “Camera” on the following screen.

***\*\*If MobileFP prompts for access to your camera, tap “Allow”. This will only happen on the first use.\*\****

MobileFP will then bring up your camera and you will aim the camera at the asset tag on the piece of equipment you are scanning. Your iPhone will make a “beep” noise when it has successfully scanned the item. Once an item is successfully scanned, it will return to the active camera screen for you to continue scanning more equipment. Continue to scan in all items you wish to put in “In Transit” status. Once you have successfully scanned all the equipment, tap “Done” in the upper right hand corner.

You should now be taken to a screen that will show a list of the equipment that you have scanned.



If you are satisfied with the list of equipment on screen tap the green **“Commit”** button. You will receive a warning saying **“Do you want to commit all items?”** Tap **“Yes”**.

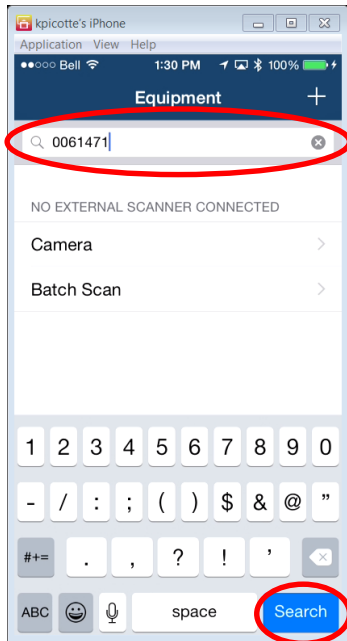
If you have made an error you have two options. You can tap the red **“Revert”** button, this will remove all items that you have scanned. If you need to remove one piece, swipe **right to left** on the piece of equipment and a **“Delete”** button will show, tap **“Delete”** to remove that item.

You should now place the item in your vehicle and proceed to the jobsite. For instructions on issuing equipment to a claim, please proceed to the section **“Scanning Equipment to “Claim” status”**.

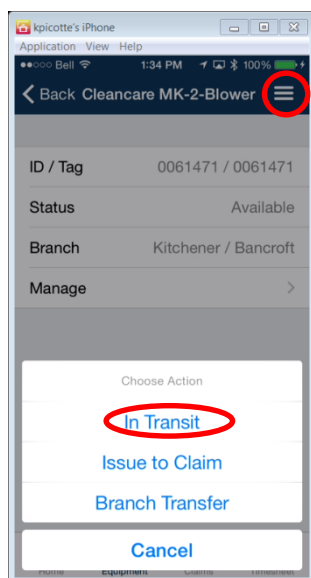
## MANUAL EQUIPMENT SEARCH

There is also the option to search equipment manually if you are unable to scan the equipment with your camera or Bluetooth scanner.

At the top of the Equipment page, you will see a “Search” box. Tap the search box to bring up the keyboard. In this box manually type the asset tag # and then tap “search” in the bottom right corner.



The equipment will then show on the screen. Tap the equipment. The following screen will show with a “Menu” button in the upper right hand corner. This menu will bring up a list of actions where you will select “In Transit”. When the warning “Are you sure you want to change the status of this item?” shows up, tap “Yes”.

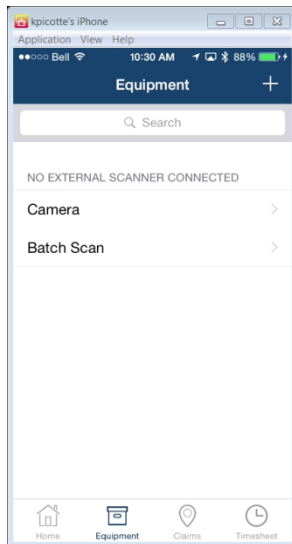


## Scanning Equipment to “Issue to Claim” status

When arriving at your jobsite, all equipment in your vehicle should be at the “**In Transit**” status. Now we need to assign the equipment to the job so it can be tracked within Claimtrak.

Select the “**Equipment**” icon from the bottom of your screen.

This will bring up the Equipment module where you will see 2 options, “**Camera**” and “**Batch Scan**”.



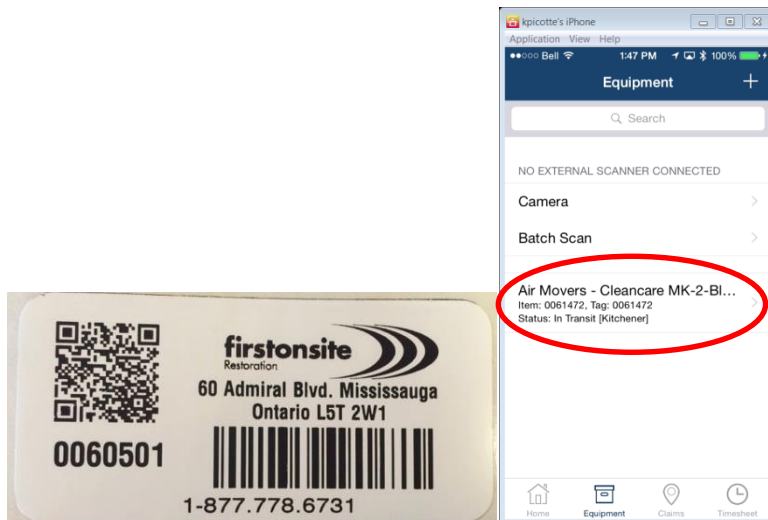
“**Camera**” will be used when dealing with equipment one item at a time.

“**Batch Scan**” will be used when dealing with multiple pieces of equipment which are being scanned to the same status.

## CAMERA

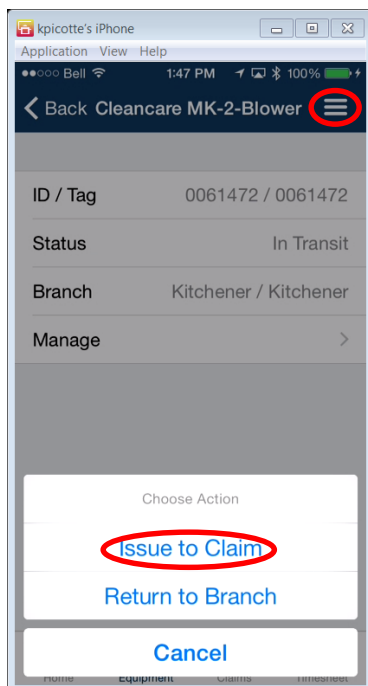
Tap **“Camera”**.

MobileFP will then bring up your camera and you will aim the camera at the asset tag on the piece of equipment you are scanning. Your iPhone will make a “beep” noise when it has successfully scanned the item. The screen will then revert to the image below.



You will now be able to see the Item#, Tag# and the current Status of the equipment as well as the branch it is currently assigned to.

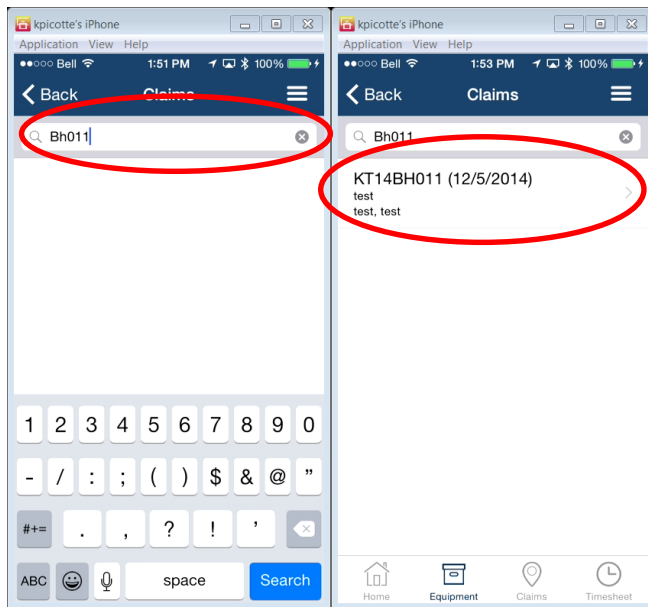
Tap on the piece of equipment to select it.



From the upper right hand corner tap the **“Menu”** icon. This will bring up a menu at the bottom which will allow you to put the item into a new status. Tap **“Issue to Claim”**. A Warning will now pop up asking **“Are you sure want to change the status of this item?”** Tap **“Yes”**.

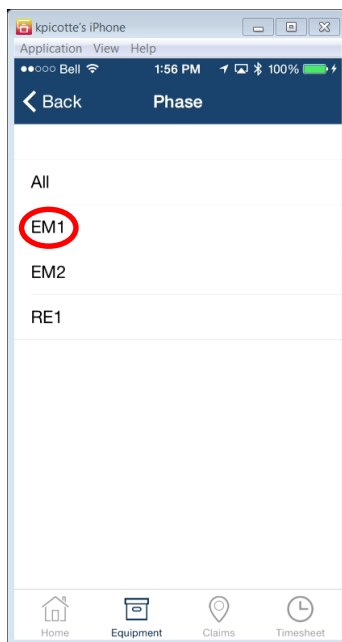
This will bring up a **“Claims”** screen where you will input the job #, address, or customer name in the **“Search”** box. Then tap **“Search”** in the bottom right corner which will generate a list of jobs matching your search criteria.





Tap the correct job from the list of claims that is generated.

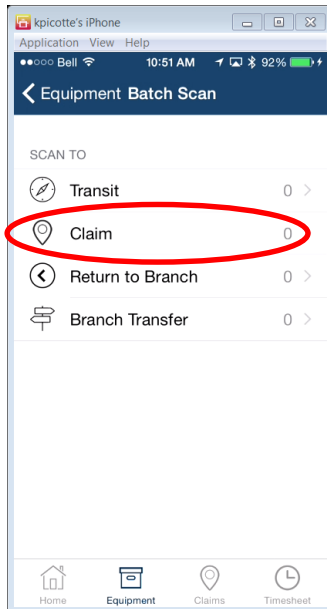
Next you need to assign the equipment to the correct phase within the job. ***Typically equipment will be issued to the EM1 phase unless you receive direction otherwise from your supervisor. If you are unsure which phase to assign to, please contact the File Manager in your branch to confirm.*** Tap the correct phase to assign that equipment to the phase.



Your equipment has now been assigned to the job.

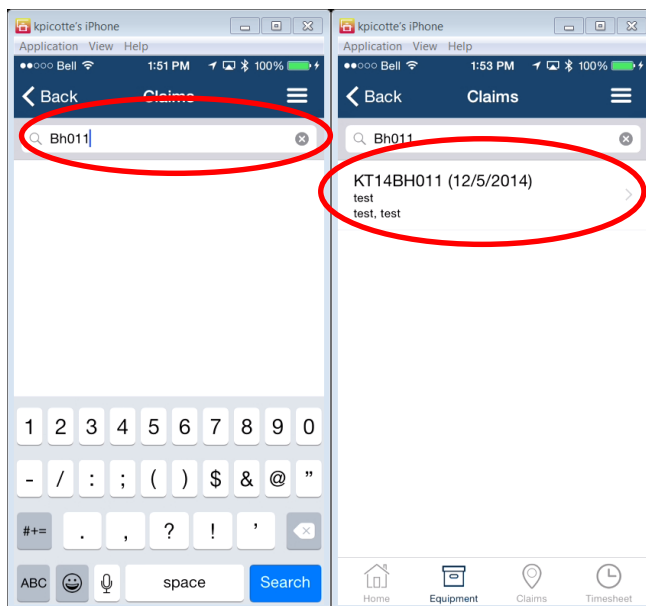
## BATCH SCAN

Tap **"Batch Scan"**.



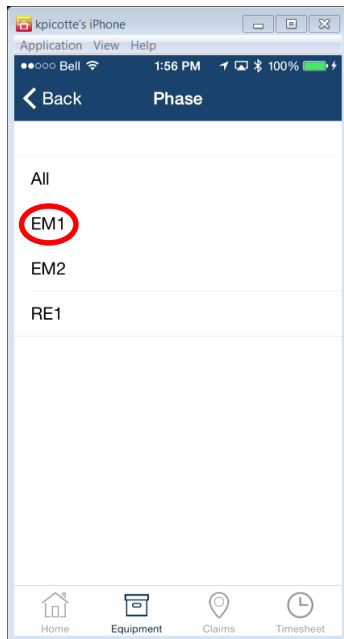
MobileFP will now prompt you to select a status that you wish to Batch Scan to. Tap **"Claim"**

This will bring up a **"Claims"** screen where you will input the job #, address, or customer name in the **"Search"** box. Then tap **"Search"** in the bottom right corner which will generate a list of jobs matching your search criteria.

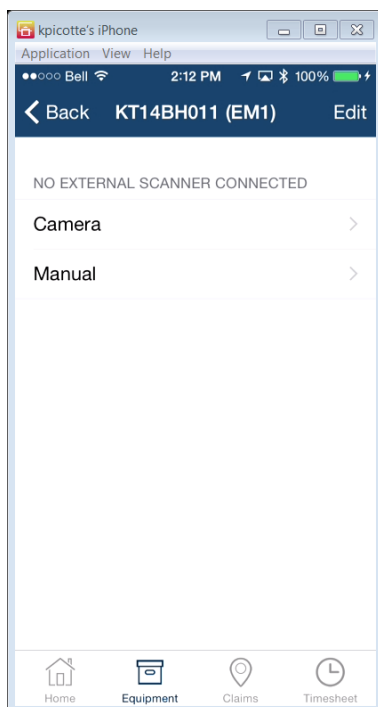


Tap the correct job from the list of claims that is generated.

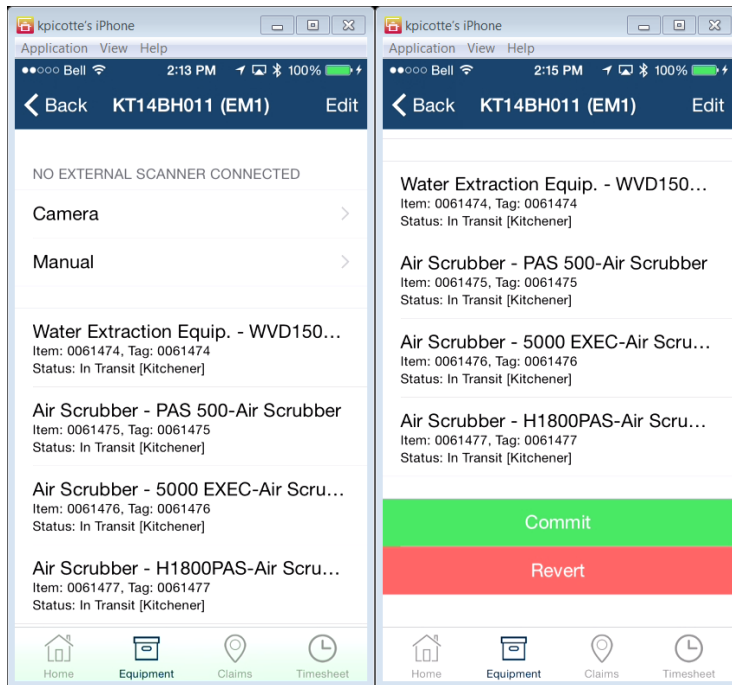
Next you need to assign the equipment to the correct phase within the job. ***Typically equipment will be issued to the EM1 phase unless you receive direction otherwise from your supervisor. If you are unsure which phase to assign to, please contact the File Manager in your branch to confirm.*** Tap the correct phase to assign that equipment to the phase.



Once you have tapped the correct phase you should see the following



Tap “**Camera**” and proceed to scan all equipment that is being assigned to this job.



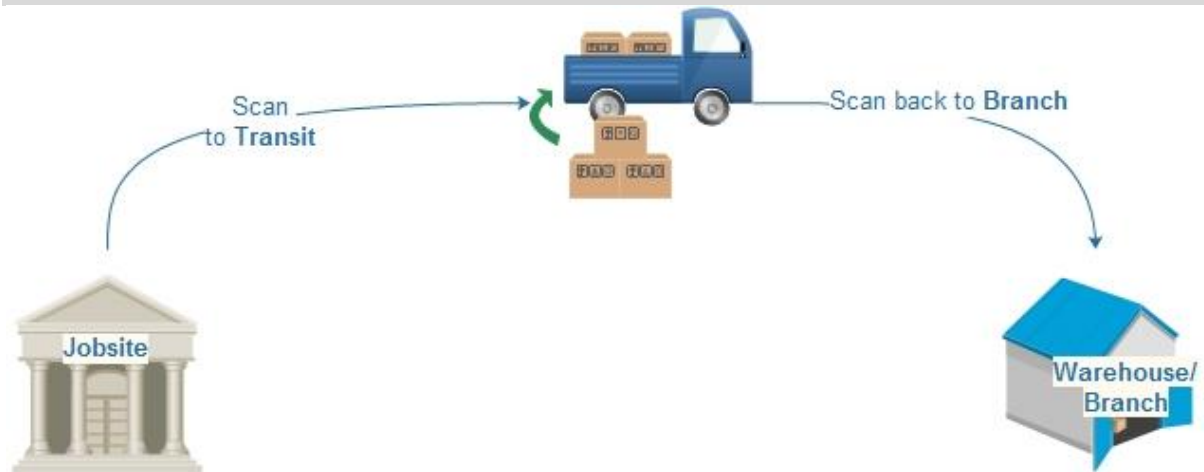
A list of equipment scanned will now show up. **If you have scanned more than 4 pieces of equipment, you will need to scroll down to see the “Commit” & “Revert” buttons.**

***\*\*To scroll down: touch the screen and move your finger upwards.\*\****

You will now see the commit button. Tap **“Commit”** and tap **“Yes”** when the warning pops up.

You have now assigned your equipment to the job.

## Returning Equipment to the Branch



When picking up equipment from a jobsite, it should be scanned as it is being loaded back into your vehicle. We want to put the equipment back to an “In Transit” status. Please refer to the section of this document for **“Scanning Equipment to “In Transit”**” status for directions on how to complete this.

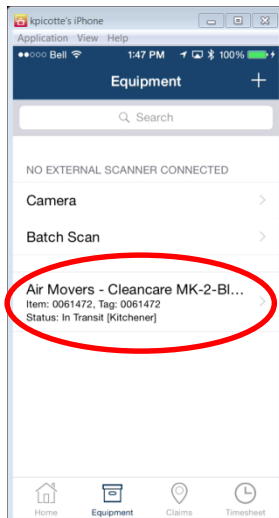
Once the equipment is **“In Transit”** it can be moved to another jobsite by scanning it to **“Claim”**; or it can be **“Returned to Branch”**. The previous section of this document provides directions for assigning equipment to a claim.

When you return to the branch with a truck full of equipment, all the equipment should be at an **“In Transit”** status. To begin open MobileFP and tap the **“Equipment”** module.

## CAMERA

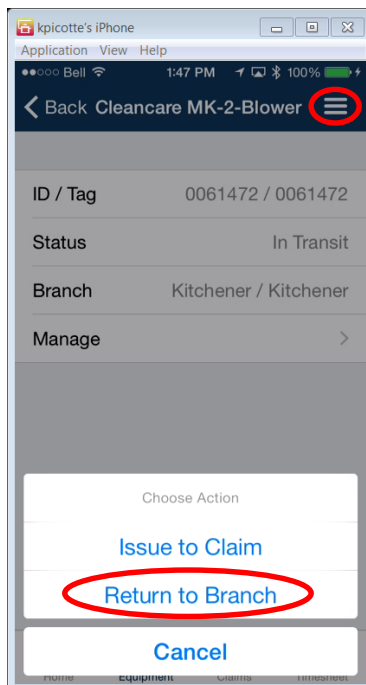
Tap “Camera”.

MobileFP will then bring up your camera and you will aim the camera at the asset tag on the piece of equipment you are scanning. Your iPhone will make a “beep” noise when it has successfully scanned the item. The screen will then revert to the image below.



You will now be able to see the Item#, Tag# and the current Status of the equipment as well as the branch it is currently assigned to.

Tap on the piece of equipment to select it.

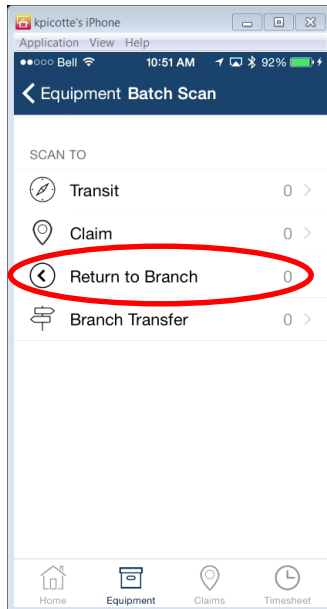


From the upper right hand corner tap the “Menu” icon. This will bring up a menu at the bottom which will allow you to put the item into a new status. Tap “Return to Branch”. A Warning will now pop up asking “Are you sure want to change the status of this item?” Tap “Yes”.

Your equipment has now been returned to the Branch.

## BATCH SCAN

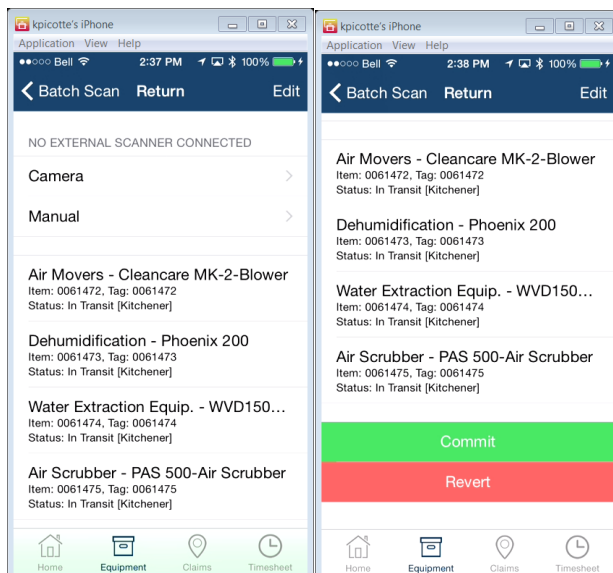
Tap “Batch Scan”.



MobileFP will now prompt you to select a status that you wish to Batch Scan to. Tap “Return to Branch”, and then select “Camera” on the following screen.

MobileFP will then bring up your camera and you will aim the camera at the asset tag on the piece of equipment you are scanning. Your iPhone will make a “beep” noise when it has successfully scanned the item. Once an item is successfully scanned, it will return to the active camera screen for you to continue scanning more equipment. Continue to scan in all items you wish to put in “Return to Branch” status. Once you have successfully scanned all the equipment, tap “Done” in the upper right hand corner.

You should now be taken to a screen that will show a list of the equipment that you have scanned.



A list of equipment scanned will now show up. **If you have scanned more than 4 pieces of equipment, you will need to scroll down to see the “Commit” & “Revert” buttons. To scroll: down touch the screen and move your finger upwards.**

You will now see the commit button. Tap “Commit” and tap “Yes” when the warning pops up.

Your equipment has now been returned to the branch!

### EQUIPMENT NOT FOUND

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If you scan a piece of equipment and receive an error indicating “equipment not found” there are several things you can do. Try force closing the app (see resources section for instruction link). If this fails, try rebooting your iPhone (see resources section for instruction link). Try having another employee scan the equipment with their iPhone. If all these items fail, please forward to [helpdesk@firstonsite.ca](mailto:helpdesk@firstonsite.ca) and include the Branch & Asset tag # with a brief description of what you were trying to do.

If equipment is from another region ie. It was borrowed during a CAT situation, we do not currently have the capability to scan equipment cross regionally.

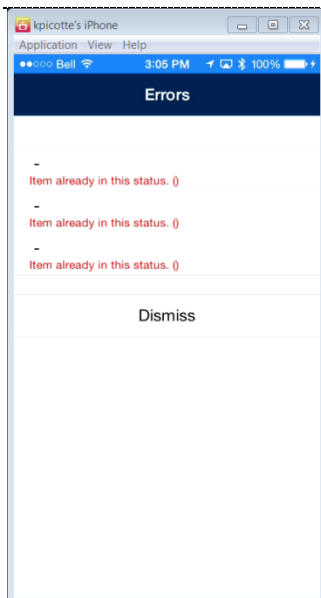
### NO ASSET TAG

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If you are attempting to scan a piece of equipment and cannot locate an asset tag with a barcode, please bring this to the attention of your supervisor. The supervisor will need to have the piece of equipment added to Claimtrak.

### STATUS ERROR

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If you receive an error “**Item already in this status**”, you have attempted to scan an item to a status that it is already in.

Double check the status you wish to scan to and ensure you are selecting the correct status.

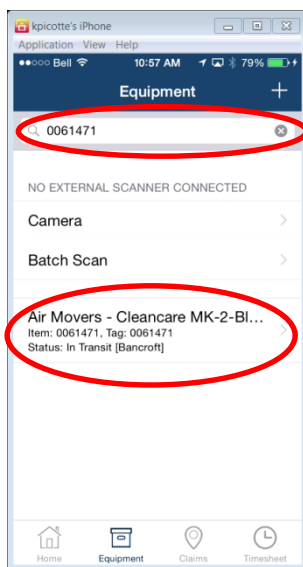


## NO CELL SERVICE

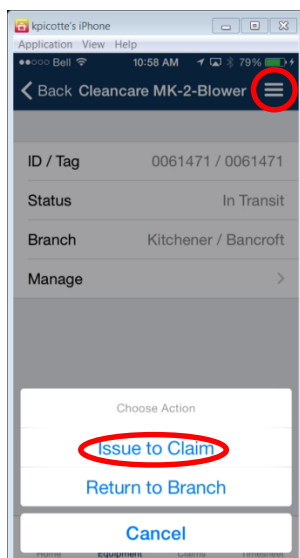
There will be times when we need to scan equipment in an area with poor or no cellular service. In this event, MobileFP will be unable to connect to the equipment database. If this situation occurs we will need to manually document the asset tag # for the equipment we have placed on a job and then enter them once we return to cell service.

At this point your equipment should be at an **"In Transit"** status.

- Document the equipment asset tag #'s with a pen and paper as you remove them from the vehicle and place the equipment on the jobsite
- Once you return to cellular service you will need to manually enter each asset tag and assign to the job



Enter the asset tag in the **"Search"** box and then tap the correct equipment.



Tap the **"Menu"** button in the upper right corner and then tap **"Issue to Claim"**. Continue to follow the instructions for issuing an item to a claim located on page **"??"**

Follow the directions above for each item you documented on the job site.

## RESOURCES

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Force close the app, for instructions visit this website: <https://support.apple.com/en-us/HT201330>

If force closing the app does not work please try rebooting your phone. For instructions visit this website: <https://support.apple.com/en-us/HT201559>

## CONTACT

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Please email [helpdesk@firstonsite.ca](mailto:helpdesk@firstonsite.ca)