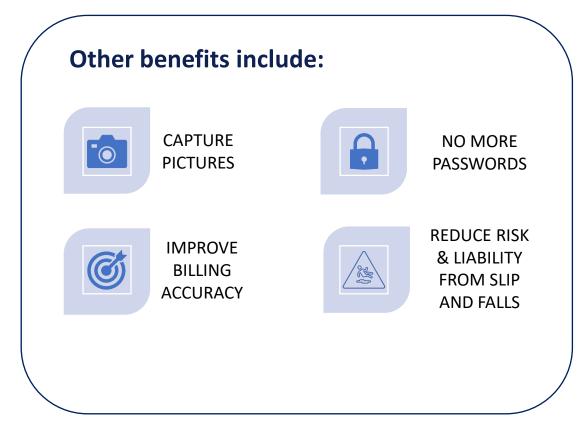## CASE APP is a solution that allows Service Partners to report services easily.

Benefits of using the APP include:

1. **Enhance Communication:** Seamless communication between employees, service partners, and customers.
2. **Streamline Workflows:** Using the CASE APP will increase efficiency, reduce errors, and provide faster response times. Service Partners will no longer have to use the LFX Logs
3. **Improve Service Delivery:** The APP ensures that both employees and service partners can deliver high-quality services promptly, meeting client expectations and service level agreements (SLAs).
4. **Ensure Data Accuracy and Compliance:** when Service Partners use the APP they can see live time within the Service Partner Portal the work completed by their crews

Other benefits include:

CAPTURE PICTURES

NO MORE PASSWORDS

IMPROVE BILLING ACCURACY

REDUCE RISK & LIABILITY FROM SLIP AND FALLS

Steps to logging into the APP

1. Download the CASE FMS APP from the APP Store or Google Play Store

2. Enter the phone number or email address.
   a. Phone number (no dashes) must be the same as the device you are downloading the APP on
   b. If you're using email you must have access to the email on the device you downloaded

3. Select the magic link
   a. Magic link will be texted if you enter a phone number
   b. Magic link will be emailed if you enter your email address

4. First-time users will need to associate your company
   a. Associate your company by selecting the red exclamation mark at the top of screen
   b. Find your company by searching and selecting

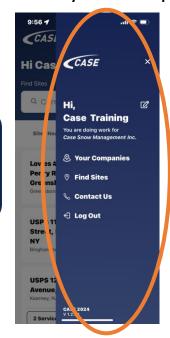# Now that you are logged into the APP let's do an overview of the homepage.

From the homepage you can search for sites, find "My Sites" or "Sites Near Me"

1. Search for sites by typing in the site name
2. The APP will always default on "My Sites," here is where you will find sites contracted with your company
3. Sites Near Me – CASE's and LFX sites but not contracted with your company

Selecting the hamburger icon will allow you to update your name, view your company name, find sites, find the phone number to contact us, and log out of the APP
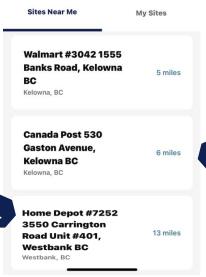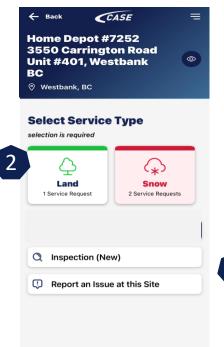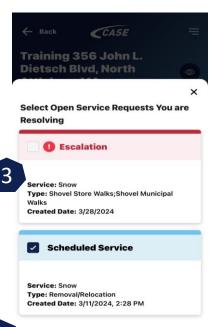
1. First, select the site you would like to report services
2. Select the Service Type – Snow, Land, Inspection, or Report an Issue at this Site
   a. Snow should be selected when performing snow services
   b. Land should be selected when performing land services
   c. Inspection can be used to report Pre/Post Season inspections, Inspections, or completed out of scope work
   d. Report an Issue at this Site – Service Partners should use this if they see out of scope opportunity
3. Open Service Requests
   a. Once you select the service type, you will have the chance to review all open service requests. Select the items you will be performing for this visit, and unselect any services you are not addressing during the visit
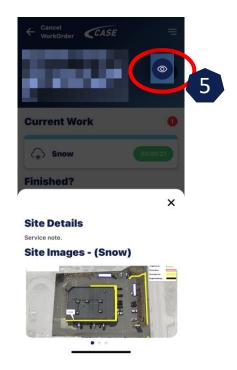4. Select Start Work

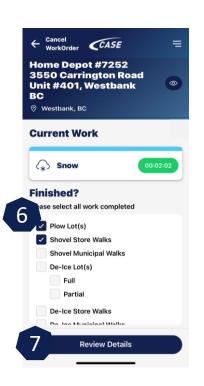5. Before you start service, you can select the eye beside the site and view the site map

6. Now it's time to select services completed during the visit

7. Once completed, select Review Details

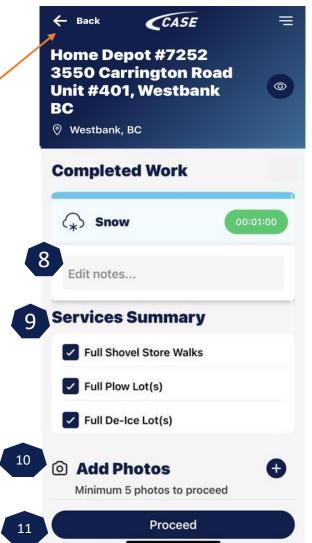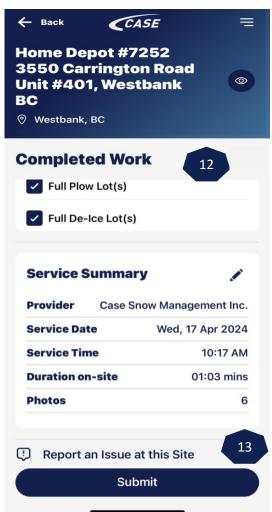8. On this screen you can add notes

9. Review the Service Summary
   a. You can unselect any items
   b. If missing services, select the back button to add

10. Add photos by selecting the "+" sign
    a. Majority of the sites require a minimum of 5 photos
    b. The APP will allow you to add more if needed

11. Once complete, select Proceed

12. Final screen will allow you to review completed work
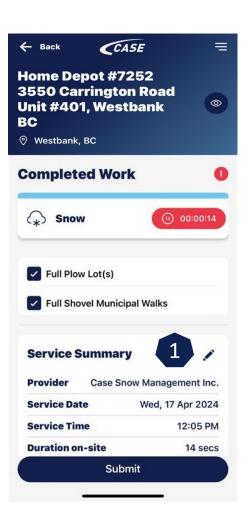
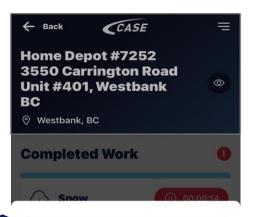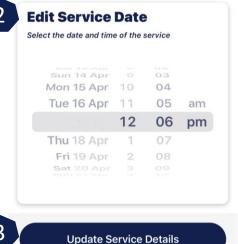16. Once you are satisfied select "Submit"

If a work order needs to be adjusted, this user may edit the Service Summary detail by using the pencil icon.

1. On the Completed Work screen, select the pencil icon in the Service Summary section

2. Edit the Service Date and Time

3. Select Update Service Details and select Completed work

1. Not receiving a magic link

   a. If you are using a phone number or email, you must click the link on the device you are using to log into the APP

2. My magic link won't work?

   a. Magic link timeout after 15 minutes, request a new link by logging into APP

   b. Magic links are only good for one use, if you need to log back in, you will need to request a new link

3. How do I get sites to show on my APP?

   a. If you launch the APP and don't see site try logging out and back in; refer to slide 4

4. Who do I call for support?

   a. Please call your account manager for technical support

5. Is there a limit to users that can log services for your company?

   a. No, you can have an unlimited amount of users associated with your company