

Volume



CONNECTUSPro

CONNECTUS TECHNOLOGY

ConnectusPro iPad Application t-Tab® Manual

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t-Tab® Manual

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General Information

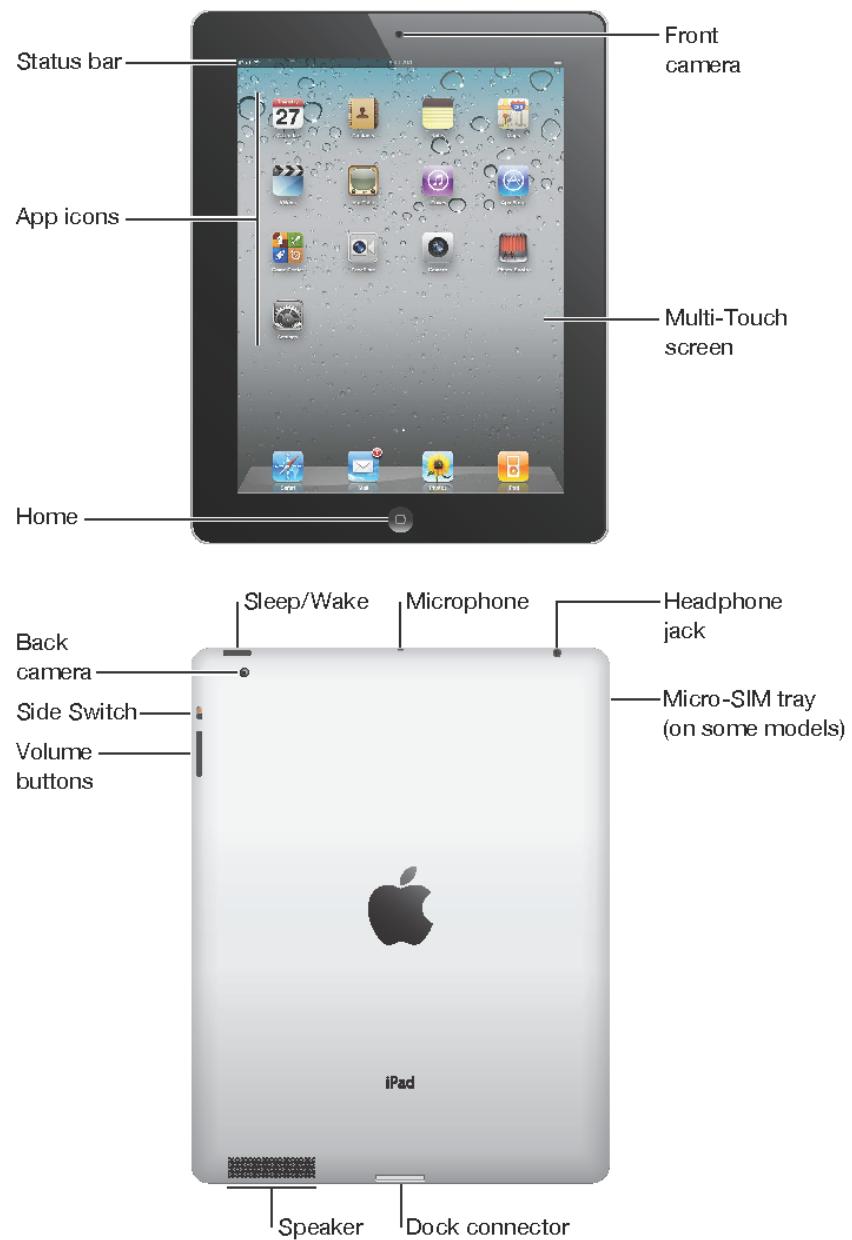
Technology so advanced, you'll forget it's even there.

When you pick up an iPad, it becomes an extension of you. That's the idea behind its innovative design. It's just 0.34 inches thin and weighs as little as 1.33 pounds, so it feels completely comfortable in your hands. And, it makes surfing the web, checking email, watching movies, and reading books so natural, you'll wonder why you ever did it any other way.

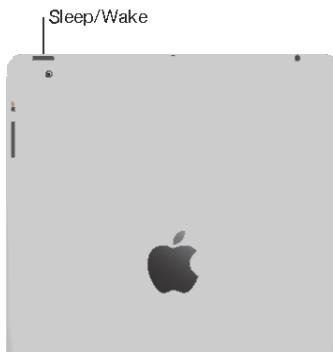


1.0 General Information

1.1. iPad Overview



1.2 Power Control



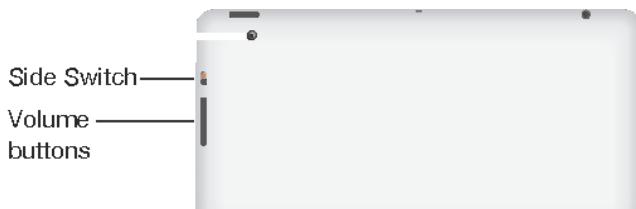
Turn iPad off

Press and hold the Sleep/Wake Button for a few seconds until the red slider appears, then drag the slider.

Turn iPad on

Press and hold the Sleep/Wake Button until the Apple logo appears.

1.3 Volume Control



Increase the volume

Press the Volume Up Button. To set a volume limit for music and other media, in Settings, choose iPod > Volume Limit.

Decrease the volume

Press the Volume Down Button.

Mute the sound

Press and hold the Volume Down Button to mute audio or video playback.

Suppress notifications and sound effects

Slide the Side Switch down to mute notifications and sound effects. This switch doesn't mute audio or video playback.

1.4 Adjust Brightness

To adjust the screen's brightness, double-click the Home Button to view the Multitasking status bar. Slide from left to right, and then drag the brightness slider.



1.5 Zooming In or Out

When viewing photos, webpages, email, or maps, you can zoom in and out. Pinch your fingers together or apart. For photos and webpages, you can double-touch (touch twice quickly) to zoom in, then double-touch again to zoom out. To manipulate a map, double-touch to zoom in, or touch once with two fingers to zoom out.



1.6 Onscreen Keyboard

The onscreen keyboard appears automatically, anytime you need to type. Use the keyboard to enter text, such as contact information, email, and web addresses. The keyboard corrects misspellings, predicts what you're typing, and learns as you use it.

You can also use an Apple Wireless Keyboard to type. When you use an external keyboard, the onscreen keyboard doesn't appear

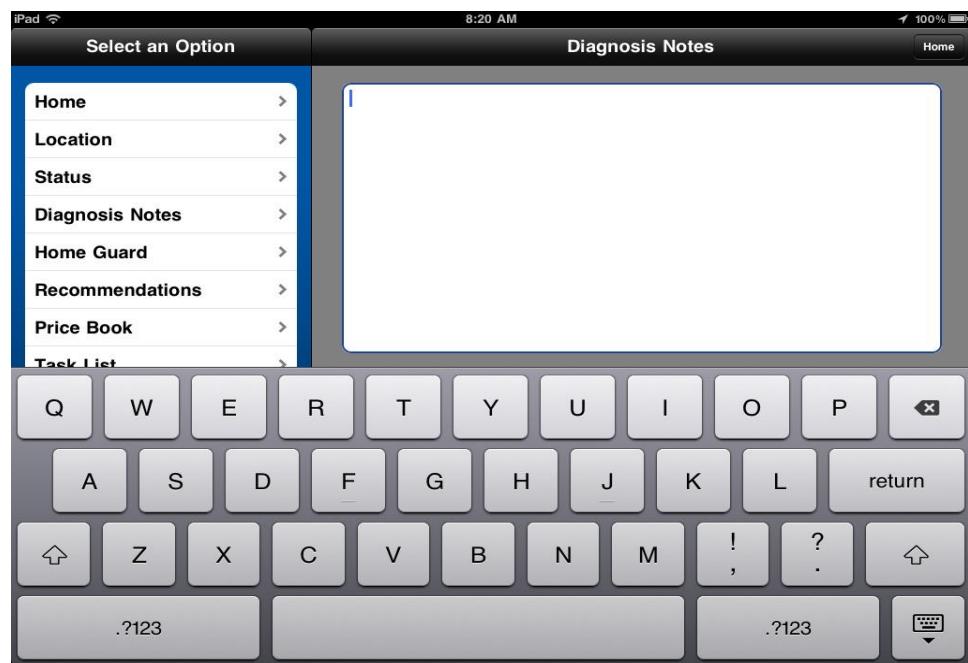
1.6.1 Typing

Depending on the app you're using, the intelligent keyboard may automatically suggest corrections as you type, to help prevent mistyped words.

1.6.2 Enter text:

1. Touch a text field, such as in a note or new contact, to bring up the keyboard.
2. Touch keys on the keyboard.

If you touch the wrong key, you can slide your finger to the correct key. The letter isn't entered until you release your finger from the key.



Apple Keyboard Usage

Backspace to delete the previous character	Tap  .
Quickly type a period and space	Double-tap the space bar. You can turn this feature on or off in Settings > General > Keyboard.
Type uppercase	Tap the Shift  key before tapping a letter. Or touch and hold the Shift key, then slide to a letter.
Turn caps lock on	Double-tap the Shift  key. The Shift key turns blue, and all letters you type are uppercase. Tap the Shift key to turn caps lock off. You can turn this feature on or off in Settings > General > Keyboard.
Show numbers, punctuation, or symbols	Tap the Number  key. Tap the Symbol  key to see additional punctuation and symbols.
Type letters or symbols that aren't on the keyboard	Touch and hold the related letter or symbol, then slide to choose a variation.
Hide the onscreen keyboard	Tap the Keyboard  key to hide the onscreen keyboard.

Chapter

2

Connecting to a Wireless Network

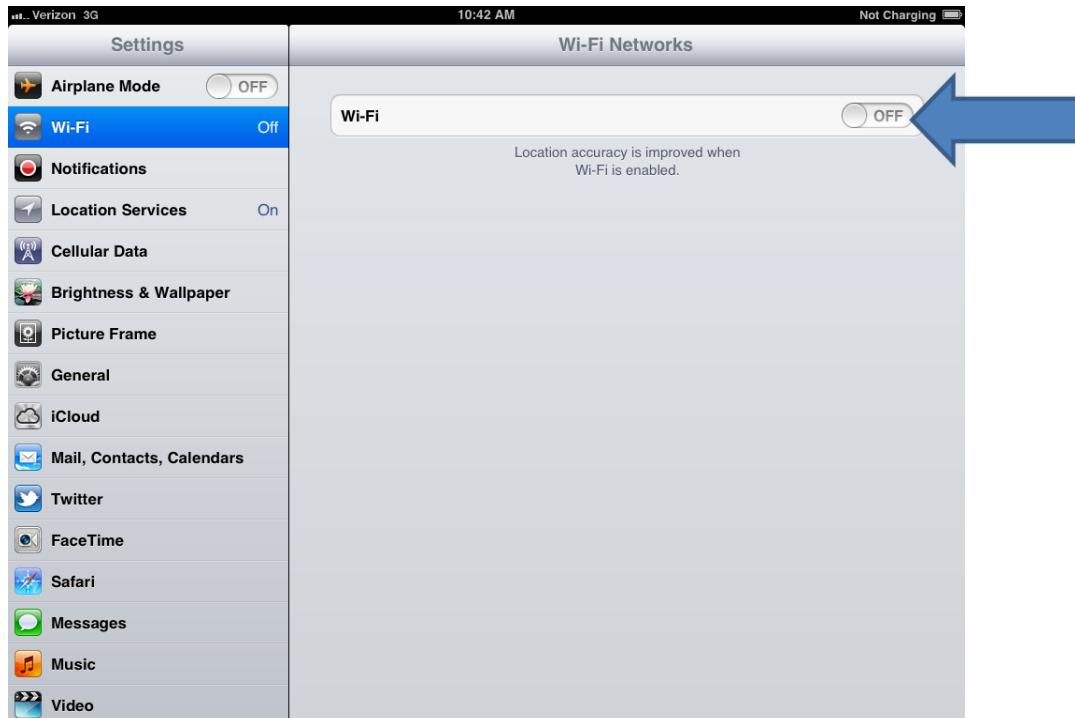


2.0 Connecting to a Wireless Network

Select **Settings** on the homepage of your iPad.



Once in the settings, select **Wi-Fi** from the settings menu on the left.



Select the name of the desired network.

Note: The iPad will start searching for wireless networks when you select the Wi-Fi option. It may take a few moments for the correct network to appear on the list.

If the network requires a password, it will prompt you. Enter the network password.

You should now be connected to the network. If you are experiencing problems be sure the password has been entered correctly.



How to set up a new Cellular Data account on an iPad Wi-Fi + 3G



3.0 How to set up a new Cellular Data account on iPad Wi-Fi + 3G

3.1 Setting up an AT&T Cellular Data account

3.1.1 Settings Icon

Select the **Settings** icon on your iPad Homepage

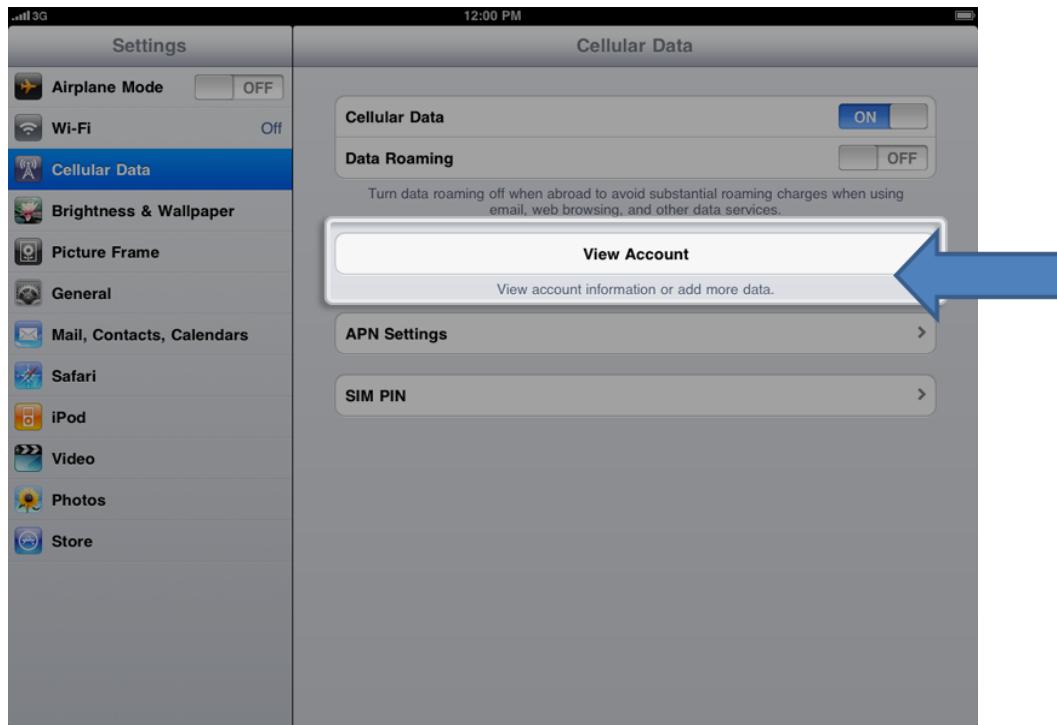


3.1.2 Cellular Data Page

Select the **Cellular Data Tab**.



Select the **View Account** Button.



3.1.3 User Information

Enter your first and last name and your phone number.



3.1.4 Login Information

Enter an email address and a password. This creates an AT&T account, allowing you to log in to the account later to make changes or view your usage statistics.

Login Information

email	appleseed@me.com
password	*****
verify password	*****



3.1.5 Recurring Domestic Plan Options

This allows you to choose the type of plan you want to use.

Rates and other details of AT&T's plans are subject to change, so consult with AT&T for applicable details and requirements.

Recurring Domestic Plan Options

The selected plan will start immediately. Your credit card will automatically be billed every 30 days, on the date your current plan ends.

250 MB of data for 30 days for \$14.99
2 GB of data for 30 days for \$25.00



3.1.6 Payment & Billing Information

Complete this section with the billing information you'd like to use to pay for your Cellular Data account.

Payment & Billing Information

Visa	✓	MasterCard	Discover	Amex
credit card	1234 1234 1234 1234			
name	John Appleseed			
expiration date	09	2012		
security code	123			
billing address	1 Infinite Loop Address 2 Cupertino CA 95014			
<input checked="" type="checkbox"/> Service address is same as billing address				
<input type="checkbox"/> Use a different service address				

Remember: Service address must contain a valid street address.
P.O. Box or Rural Route is not permitted.

Next



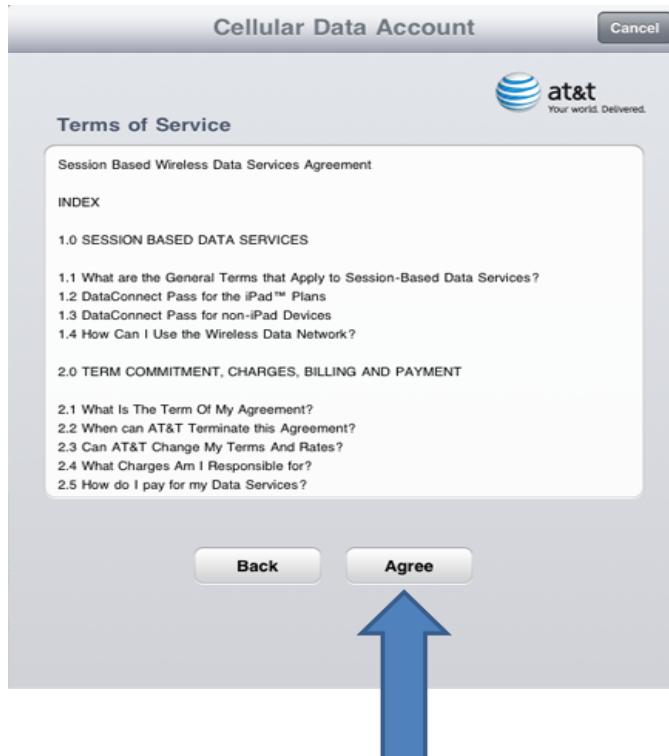
You can select "Use a different service address" if you're billing address is a P.O. Box or Rural Route, and enter an alternate address for your service address.



Note: You cannot use a P.O. Box or Rural Route for the service address. AT&T requires that you use a street address for the service address.

3.1.7 Cellular Data Account

The Terms of Service will display on the screen. Take a minute to read this agreement. Select **Agree** to continue.



The Payment Summary will now display on the screen. Review this information carefully before selecting **Submit**.



Select **Submit** to complete the creation of your Cellular Data account. The Congratulation screen will appear, letting you know that your account has been created, and that AT&T is activating your iPad.

Select **OK** to complete the process.



Your iPad will notify you when your Cellular Data connection has been activated.



Note: The Cellular Data account sign-up process is managed by AT&T. If you have questions, concerns, or problems with this sign-up process, please contact AT&T.

3.2 Setting up a Verizon Cellular Data account

3.2.1 Settings Icon

Select **Settings** on your iPad Homepage.

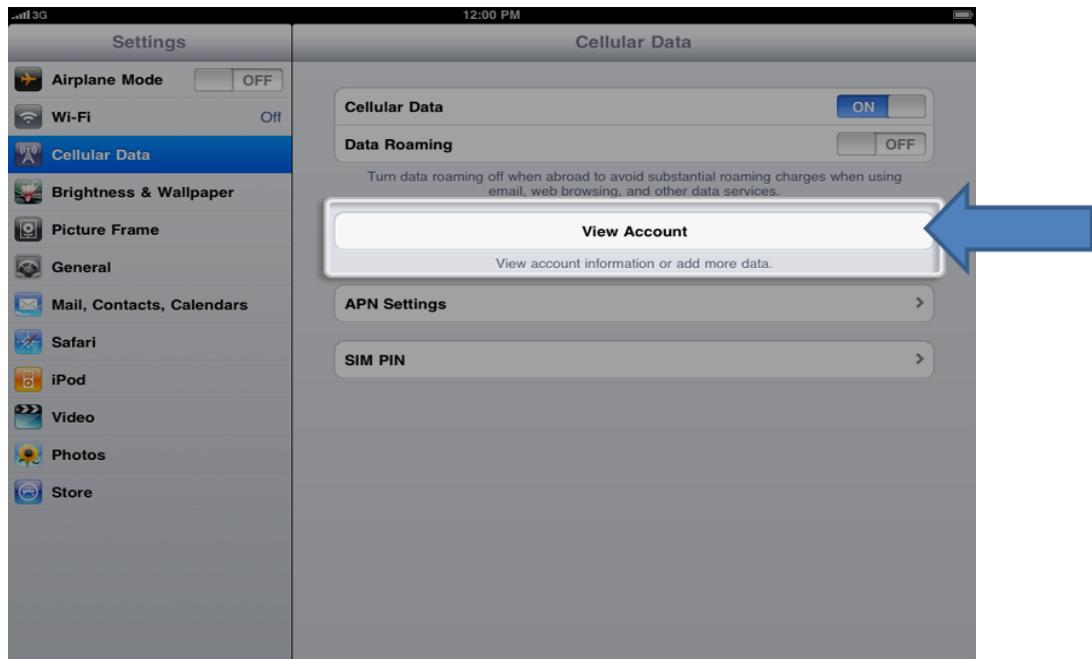


3.2.2 Cellular Data Page

Select the **Cellular Data** tab.

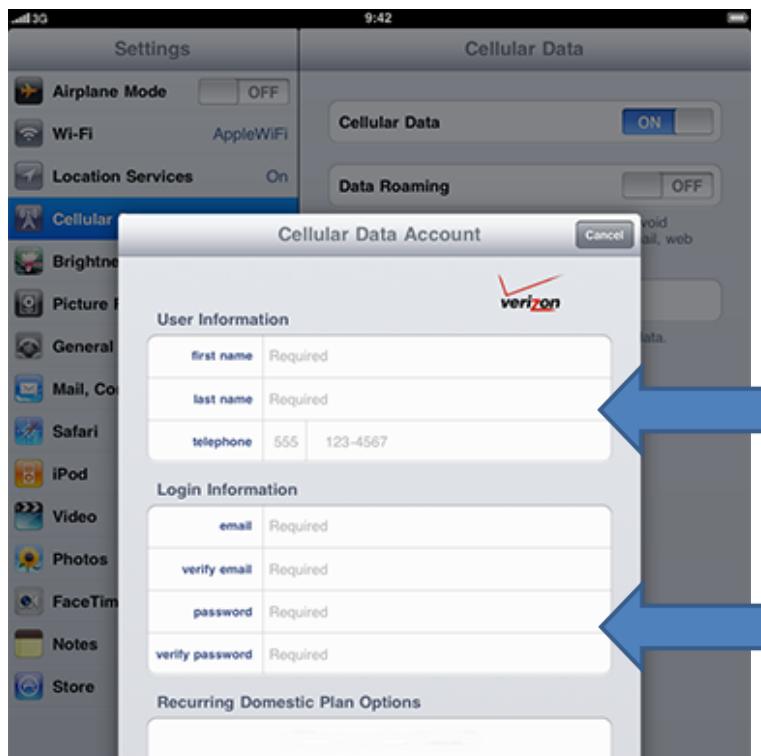


Select **View Account**.



3.2.3 User Information and Login Information

Enter your first name, last name and phone number.



Enter and verify an email address and a password. This creates a Verizon account, allowing you to log in to the account later to make changes or view your usage statistics.

3.2.4 Recurring domestic plan options

This allows you to choose the plan you prefer. Rates and other details of Verizon's plans are subject to change, so consult with Verizon for applicable details and requirements.



3.2.5 Payment and billing information

Complete this section with the billing information you'd like to use to pay for your Cellular Data account.

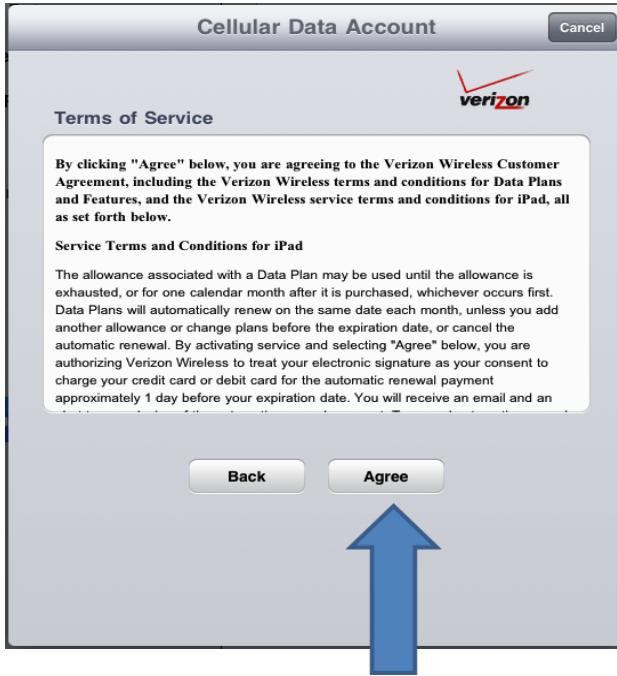
A screenshot of a mobile application for payment and billing information. It shows a form with the following fields:

Visa	✓	MasterCard	Discover	Amex
credit card	1234 1234 1234 1234			
name	John Appleseed			
expiration date	09	2012		
security code	123			
billing address	1 Infinite Loop Address 2 Cupertino CA 95014			
Service address is same as billing address <input checked="" type="checkbox"/>				
Use a different service address				

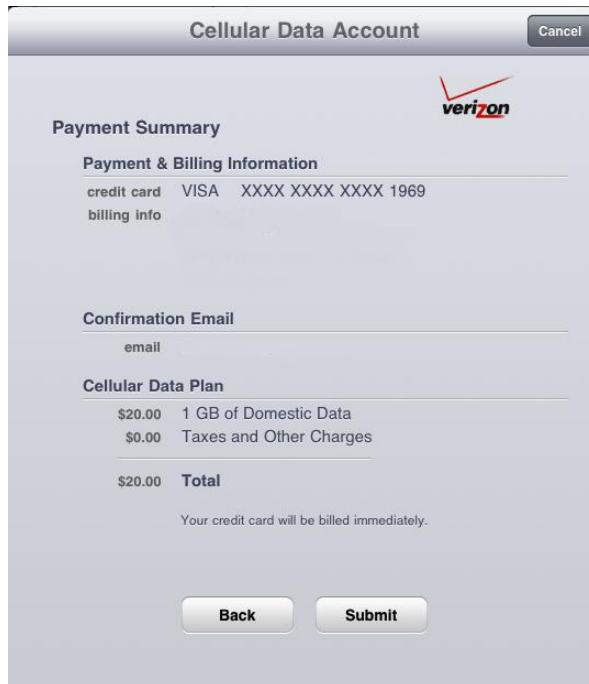
A note at the bottom says: "Remember: Service address must contain a valid street address. P.O. Box or Rural Route is not permitted." A "Next" button is at the bottom right.

3.2.6 Cellular Account Agreement

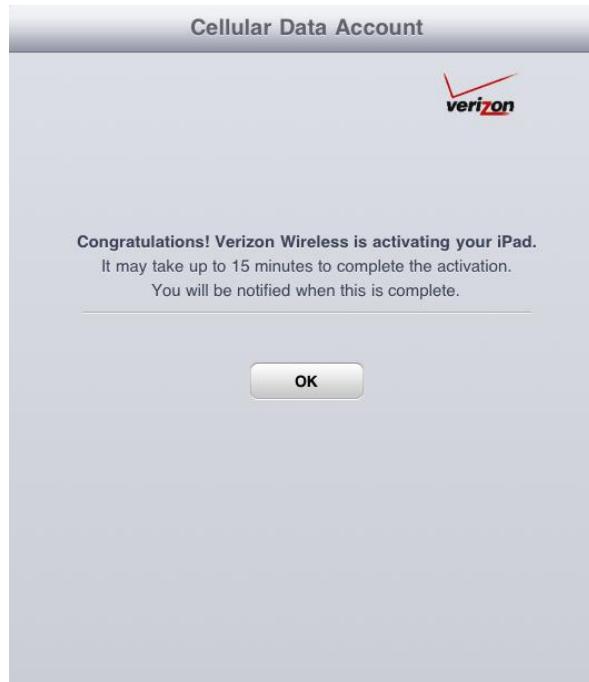
The Terms of Service will display on the screen. Take a minute to read this agreement. Select **Agree** to continue.



The Payment Summary will now display on the screen. Review this information carefully before selecting **Submit**.



The Payment Summary screen appears. This shows you a summary of the account and plan you have selected. Select **OK** to complete the creation of your Cellular Data account.



Your iPad will notify you when your Cellular Data connection has been activated



Notes: The Cellular Data account sign-up process is managed by Verizon. If you have questions, concerns, or problems with this sign-up process, please contact Verizon.

Getting Started

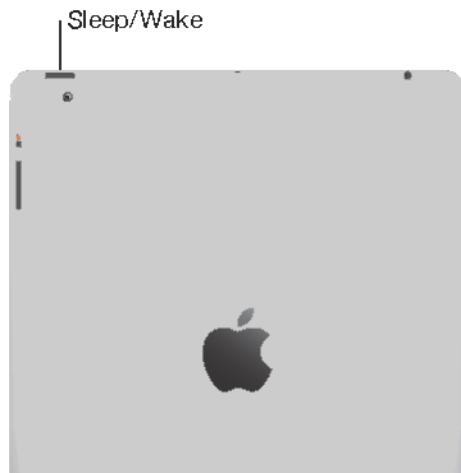
This section describes the process of opening the ConnectusPro Application on the iPad



4.0 Getting Started

4.1 Turn on the iPad

Press and hold the **Sleep/Wake** button.



4.2 Slide to Unlock

Slide the arrow to the right to unlock the iPad.



4.3 iPad Home Screen

Open the ConnectusPro Application.



Home Screen

5.0 Home Screen

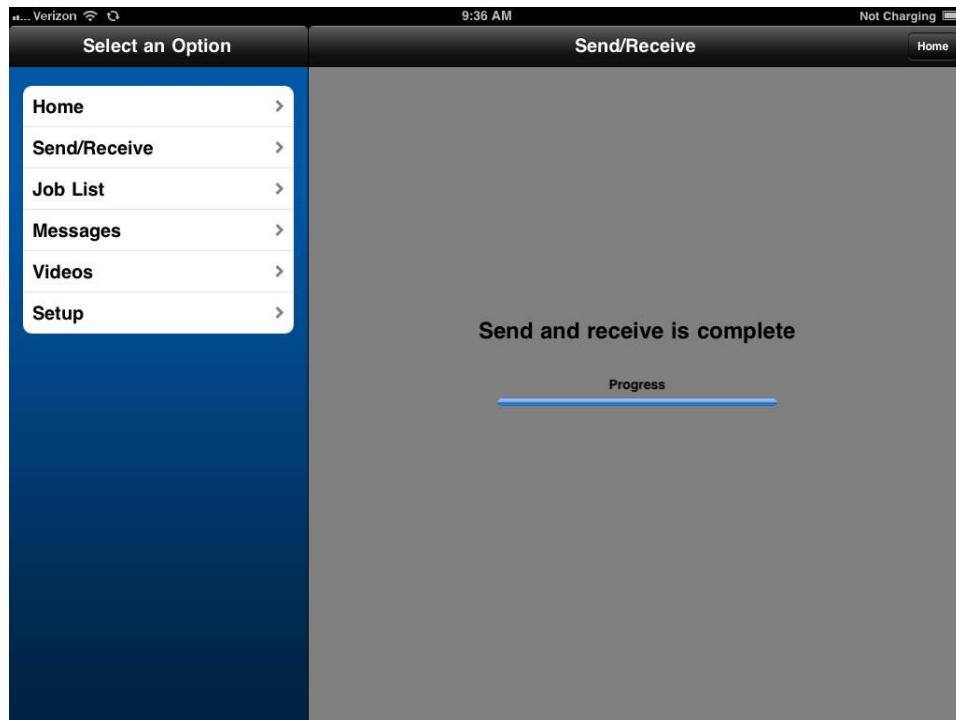


5.1 Send/Receive Tab

In order to receive a job, you must select the **Send/Receive** tab.

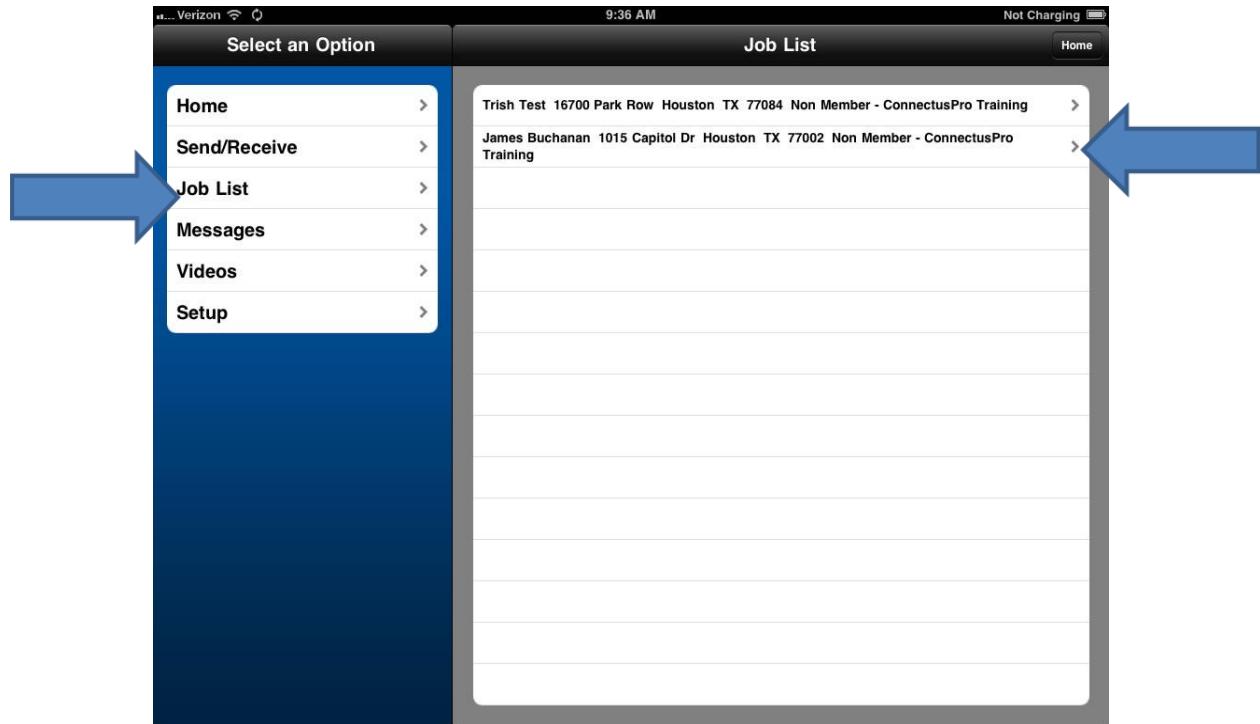


The iPad Application will receive the next available job from the Service Center.



5.2 Job List Tab

Select **Job List** to see the list of jobs on your iPad. Load a job by selecting the job from the Job List.



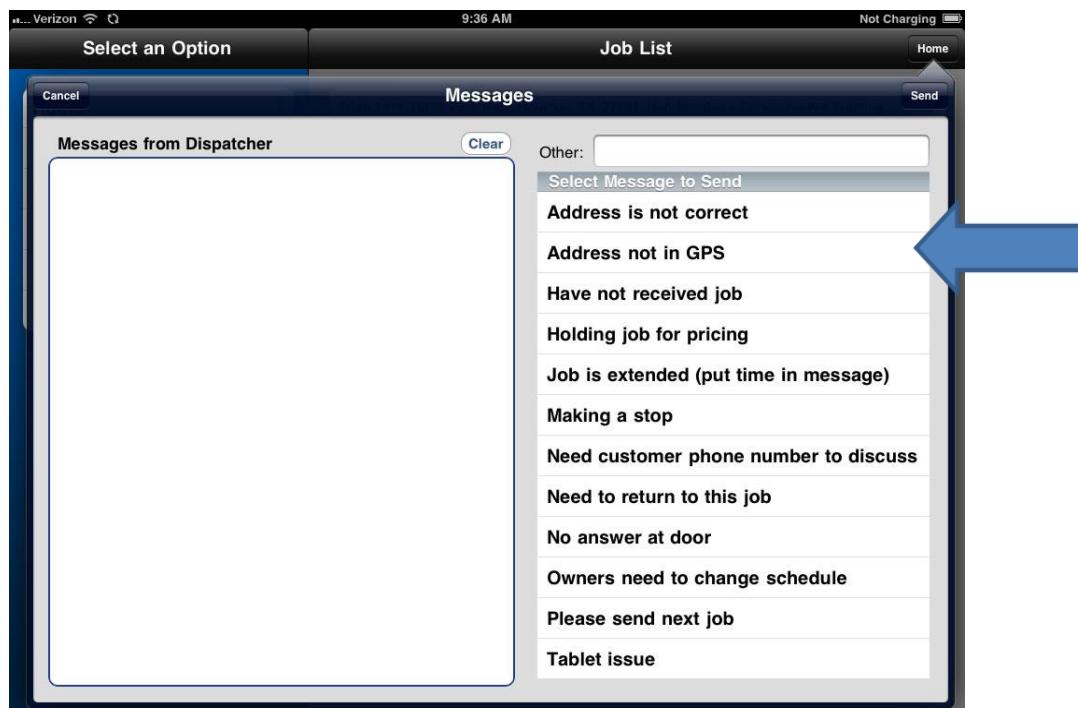
5.3 Message Tab

Select the **Messages** tab from the menu on the left.

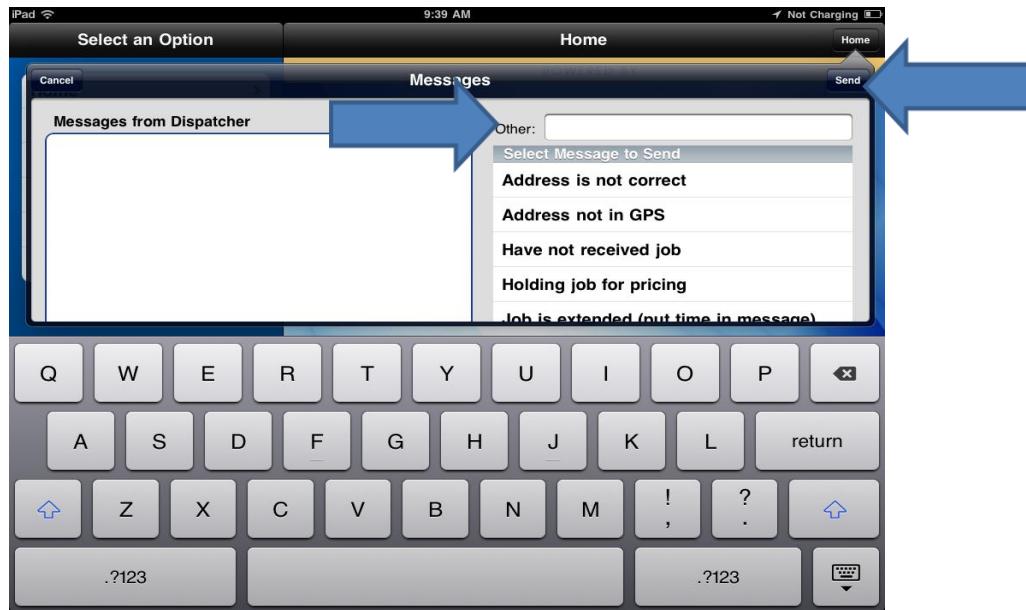


The messages pane on the right offers several different options. **Note:** This is just a sample of the topics available.

Select the message that best describes your issue. This will send the message to Service Center.



If you wish to send a message that is not available in the dropdown menu, select the white space in the box next to **Other**. Type the message you wish to send to the Service Center and then select **send**. This will send the message to Service Center and then the issue can be dealt with accordingly.

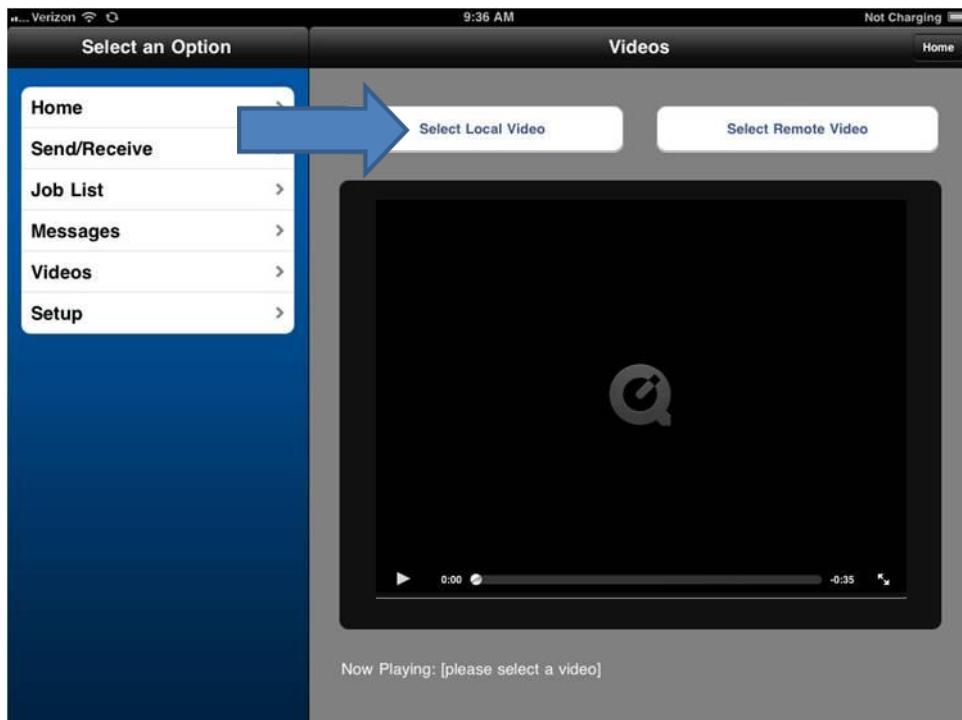


5.4 Video Tab

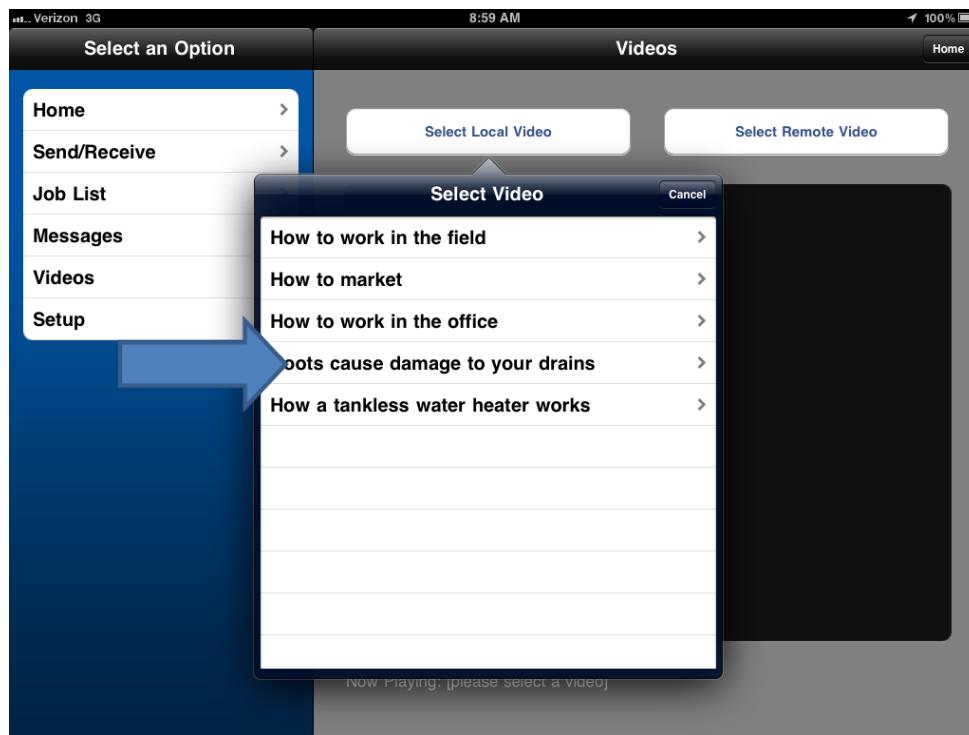
This Tab features videos for use when interacting with customers. To show a video touch the Videos Tab.



When the video page opens, choose the Select Local Video button to browse videos.



Use the dropdown menu to select the desired video.

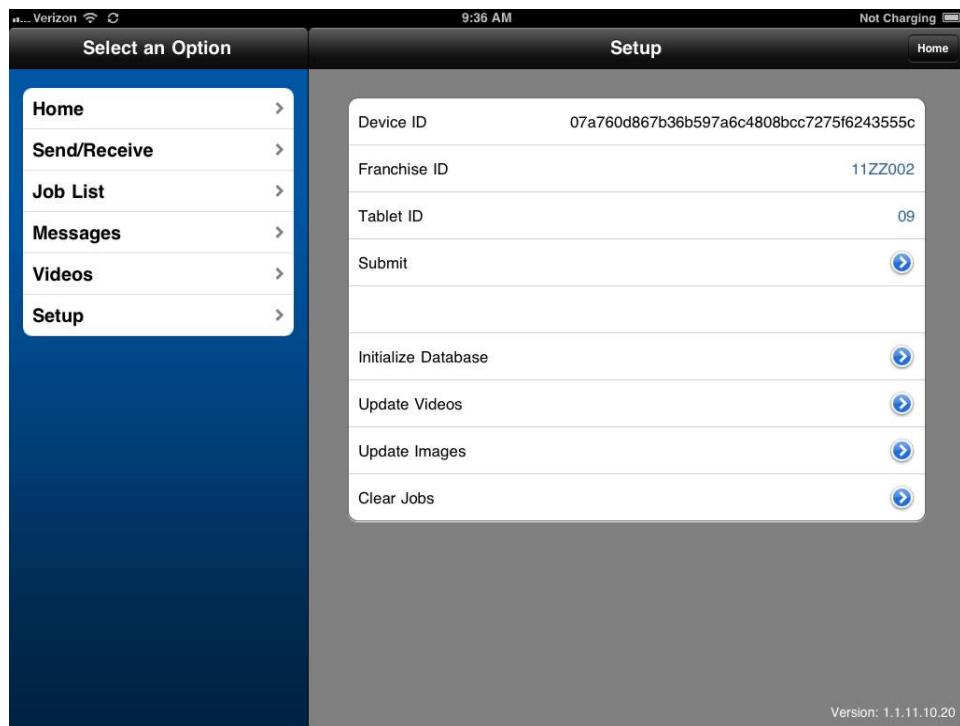


5.5 Setup Tab

The final Tab on the Home Screen is the **Setup** tab.



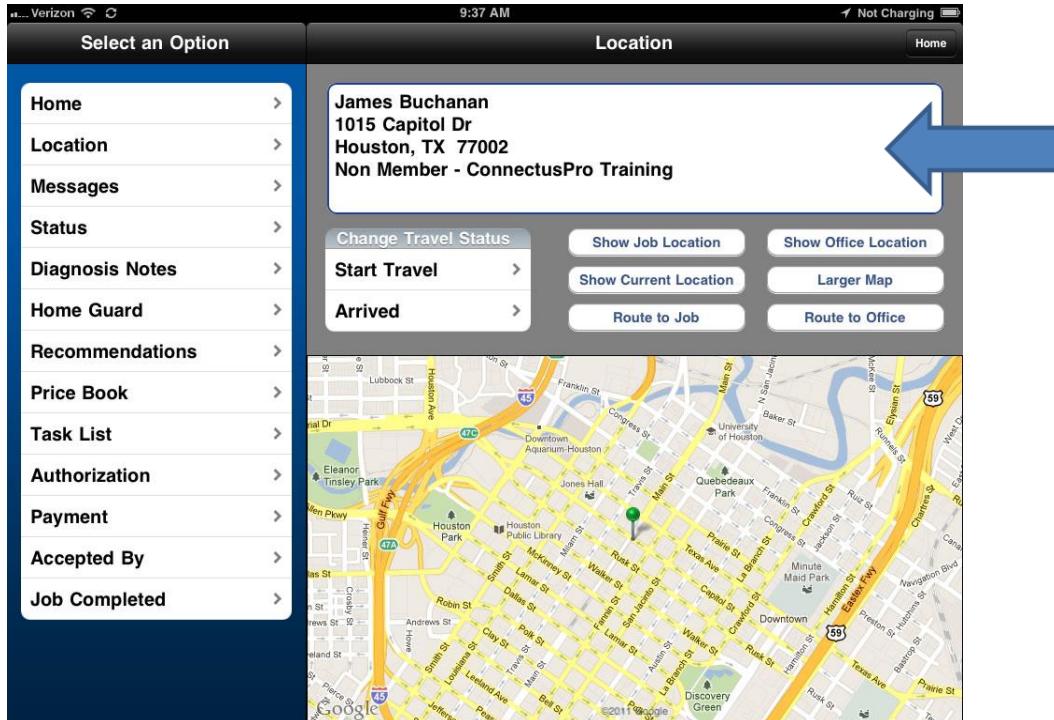
The Setup screen has basic information about the iPad. You can use this screen to update videos and images, as well as determine which version of the application you are currently running.



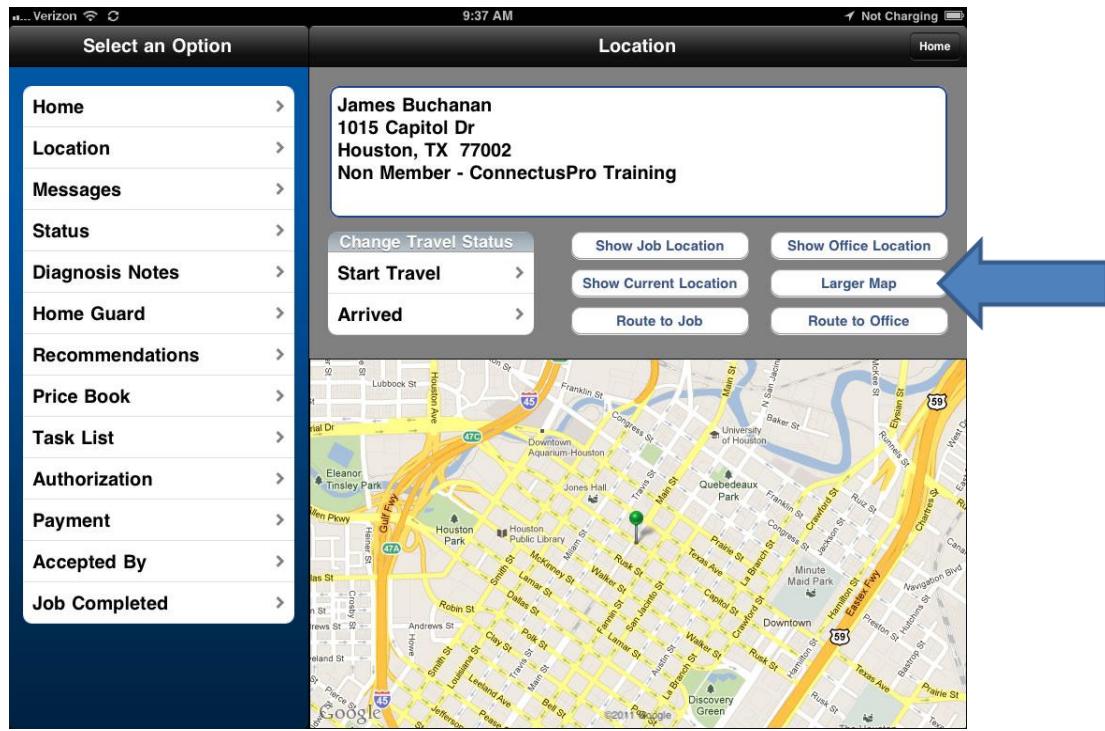
Location Screen

6.0 Location Screen

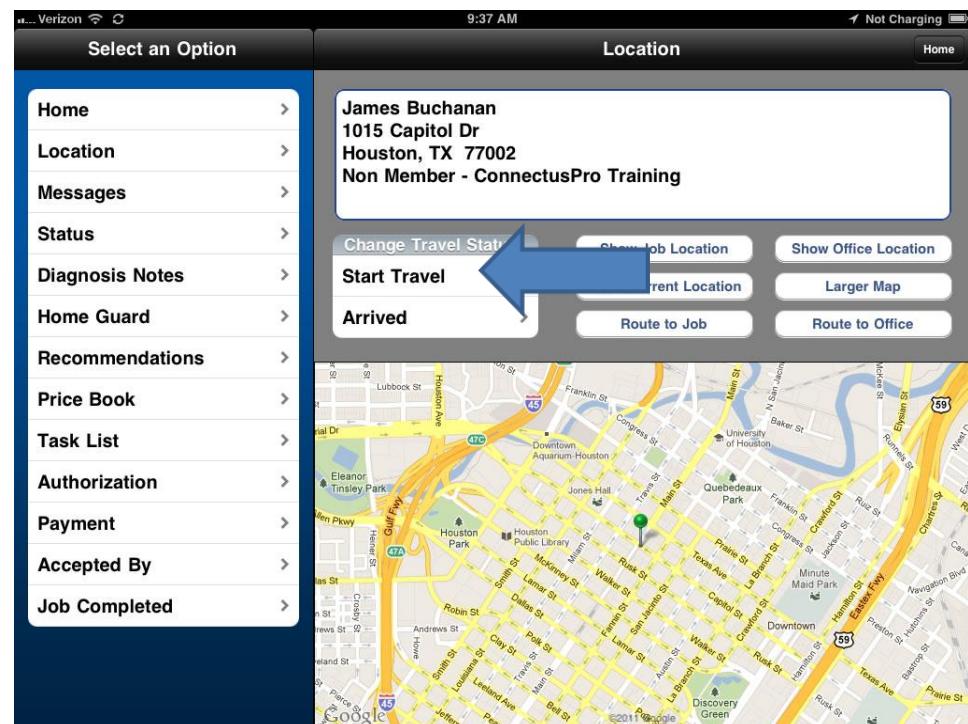
This is the Location Screen. This screen offers the location and directions to your current job.



The location screen also offer driving directions to the indicated location by selecting from the six buttons on the middle right portion of the screen.



Once you have determined your route, select the Start Travel Button. This informs the Service Center that you are starting your route to the job, allowing the Service Center Representative to call the customer and advise them that your technician is enroute.

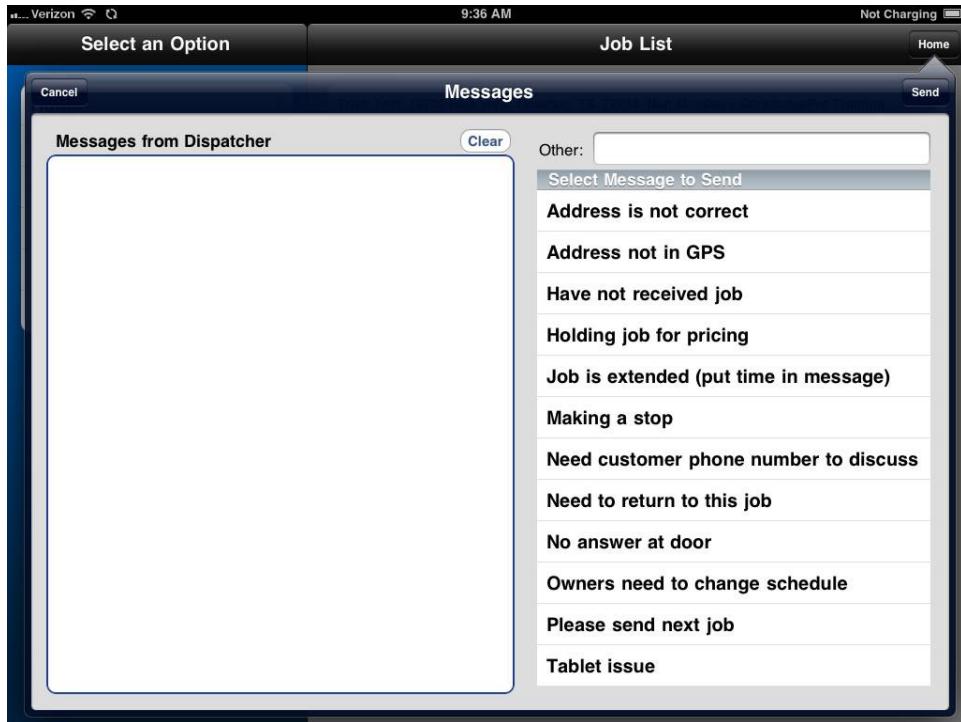


Message Screen

7.0 Message Screen

The Message screen allows the technician to communicate with the Service Center via text messaging.

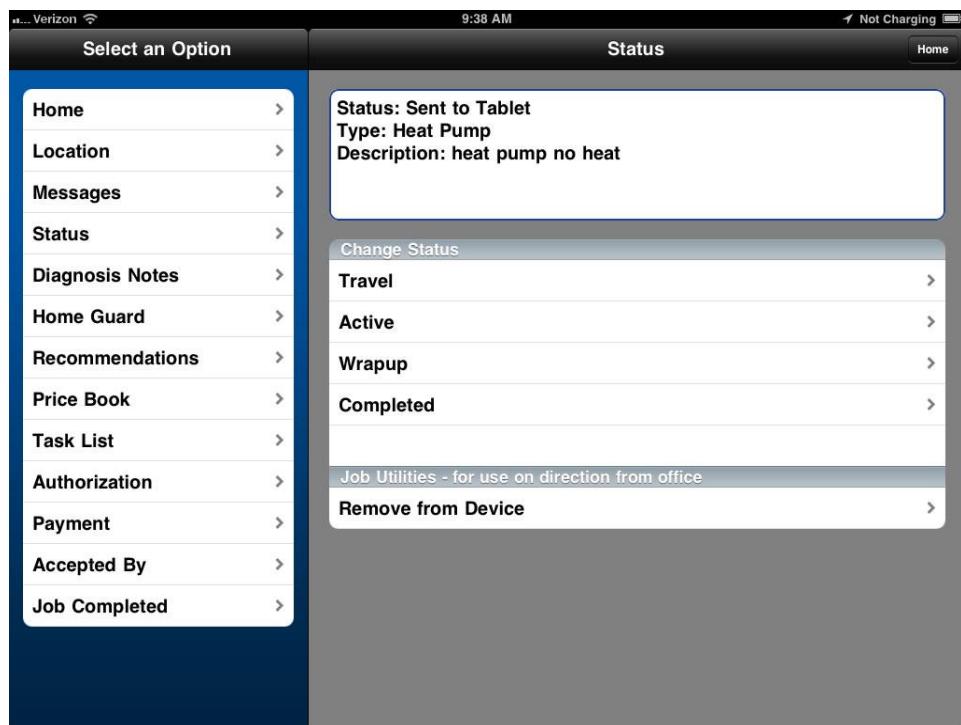
For instructions on how to use the Messaging Screen please refer to Chapter 5 Section 5.3 Messaging tab on page 30.



Status Screen

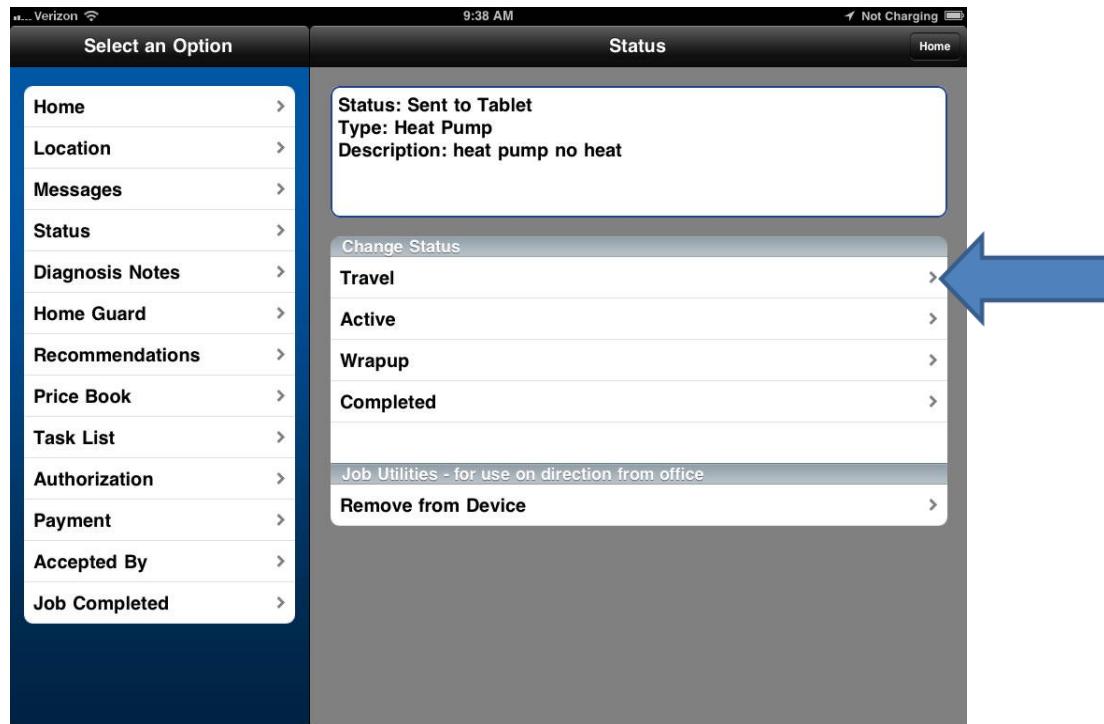
8.0 Status Screen

The Status screen informs the Service Center of the technician's status, as it relates to the current job.

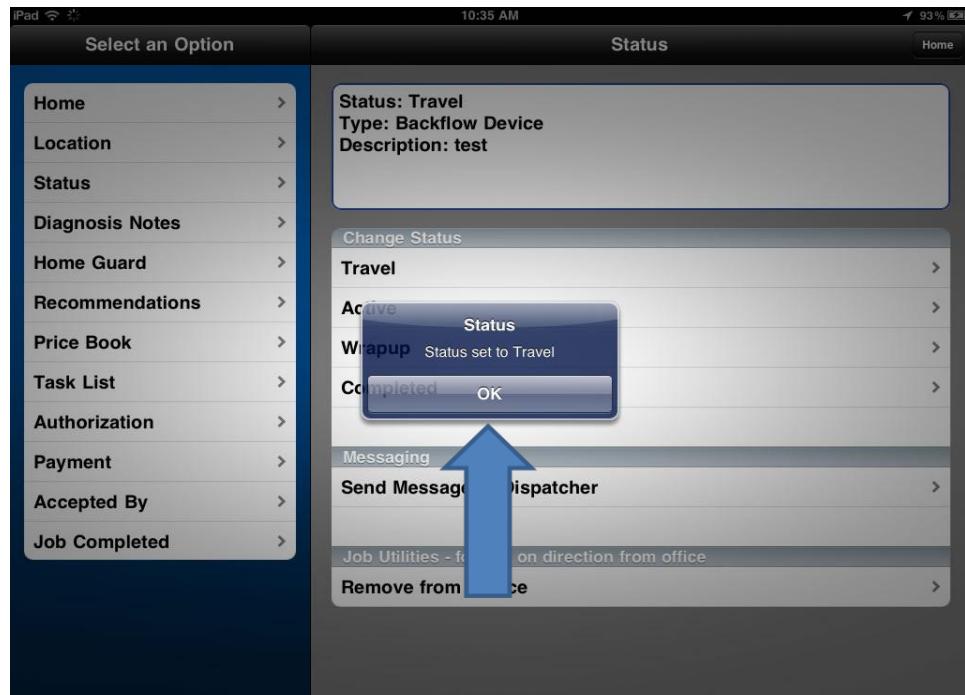


8.1 Travel Status

Select the **Travel** status to notify the Service Center that you are enroute to the job.

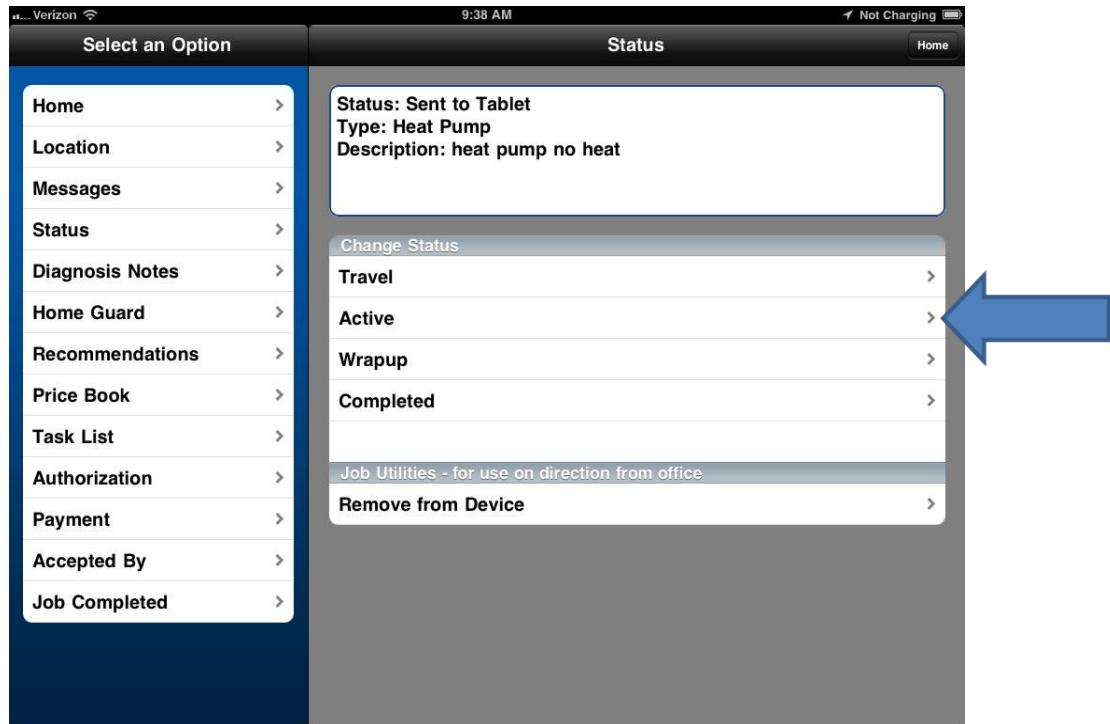


After selecting **Travel** from the Change Status Pane, the Service Center will be notified that your status has changed. Select **OK** to continue.

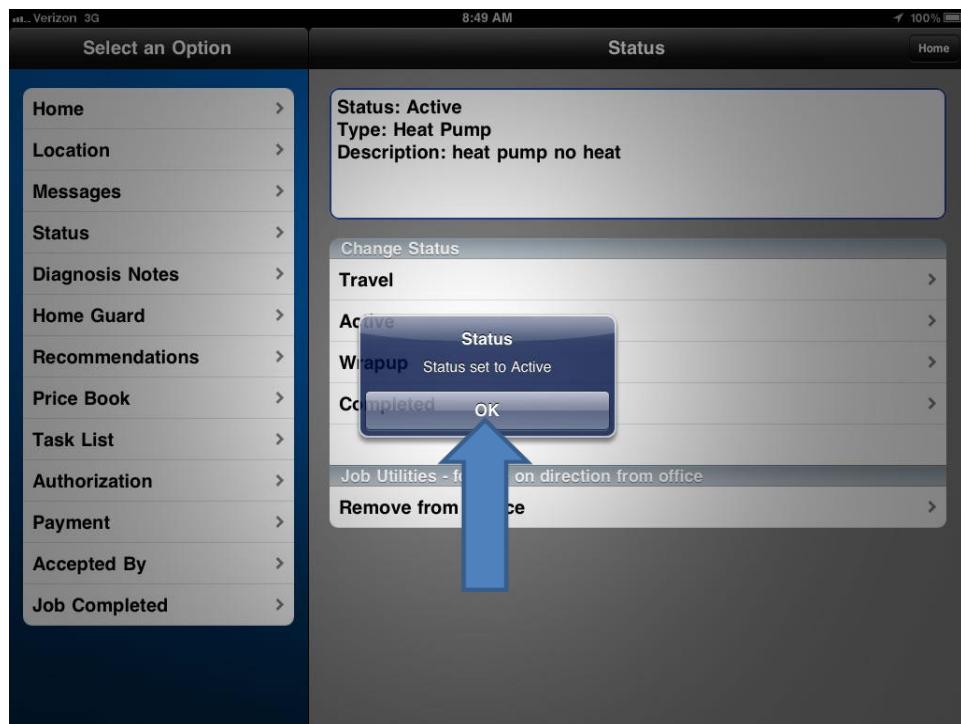


8.2 Active Status

Upon arrival at the job location, select **Active** from the Change Status Pane to notify the Service Center that you have arrived and are beginning the job.

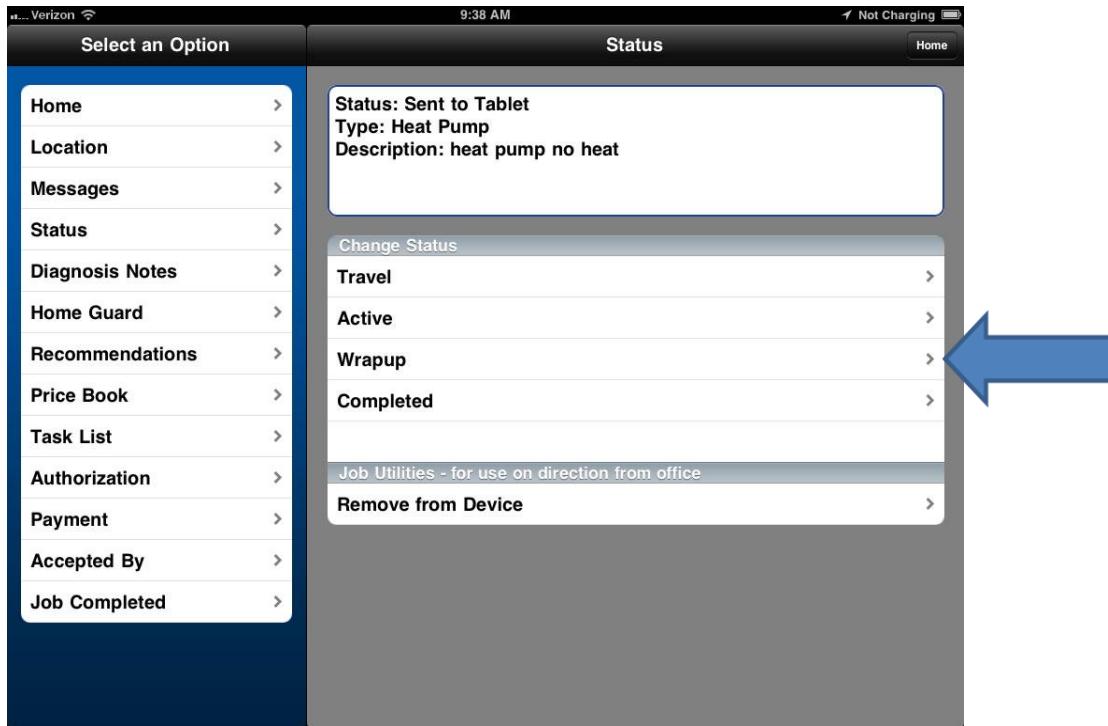


Select **OK** to continue.

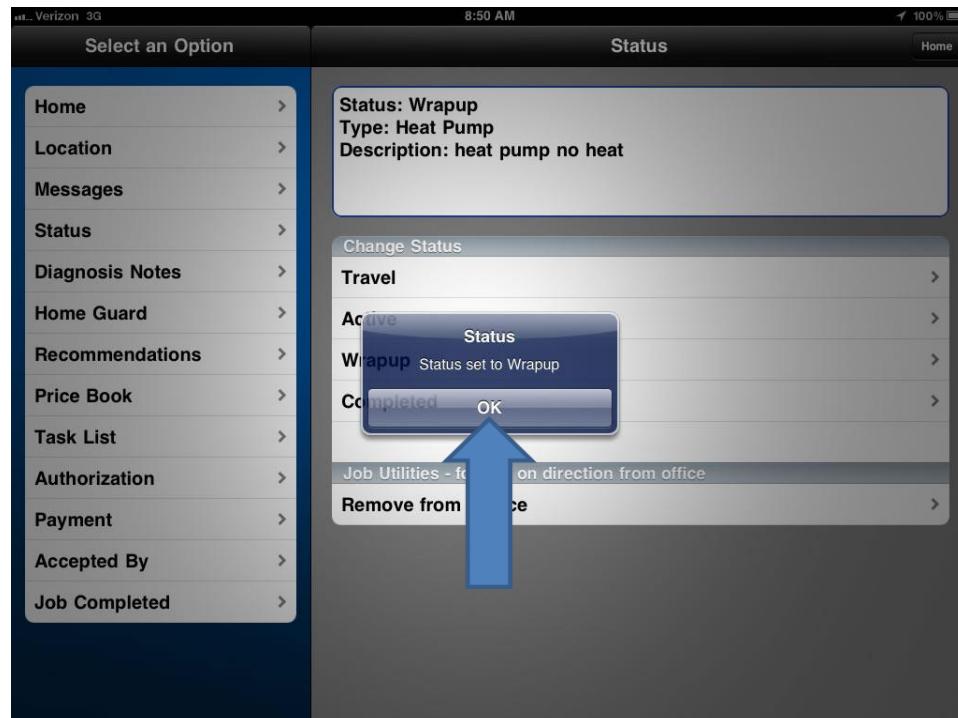


8.3 Wrapup Status

Select the **Wrapup** Status to notify the Service Center that you are nearly complete with the current job.

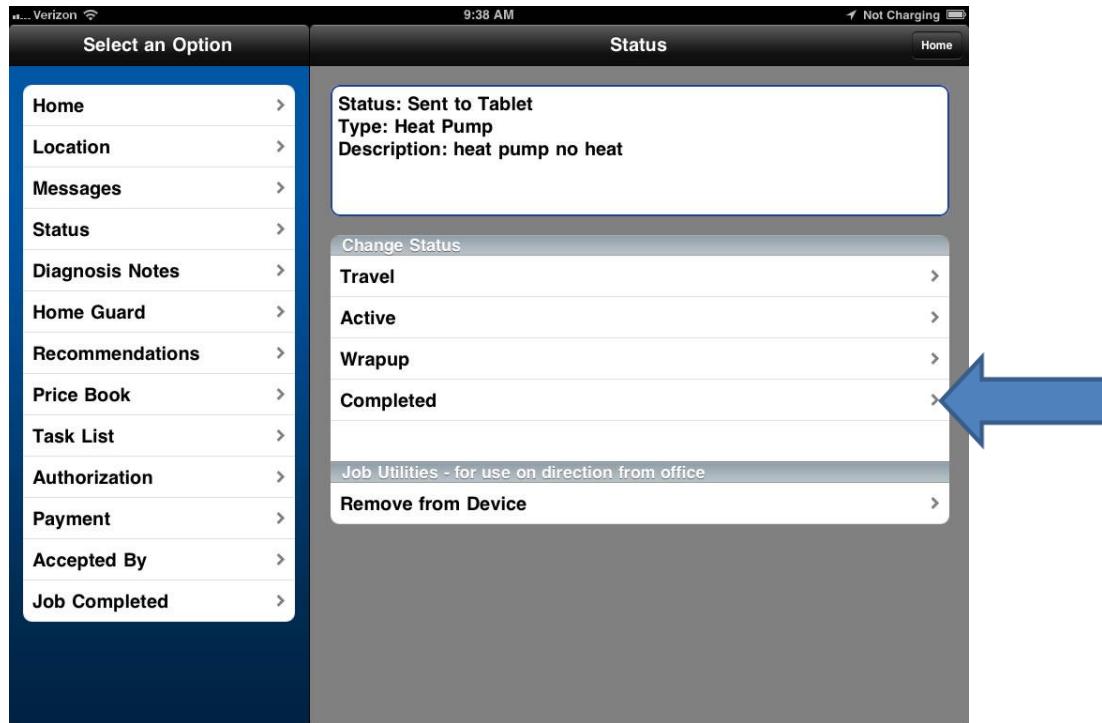


Select **OK** to continue.

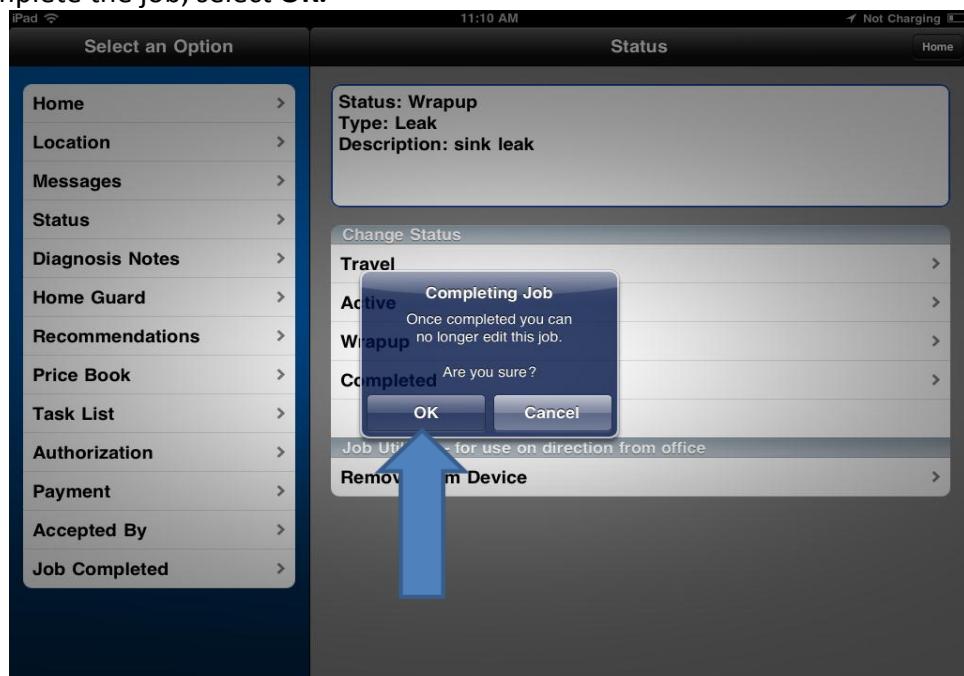


8.4 Completed Status

Select the **Completed** status to notify the Service Center that you have completed the job. **Completing** a job includes accepting payment after services are rendered.



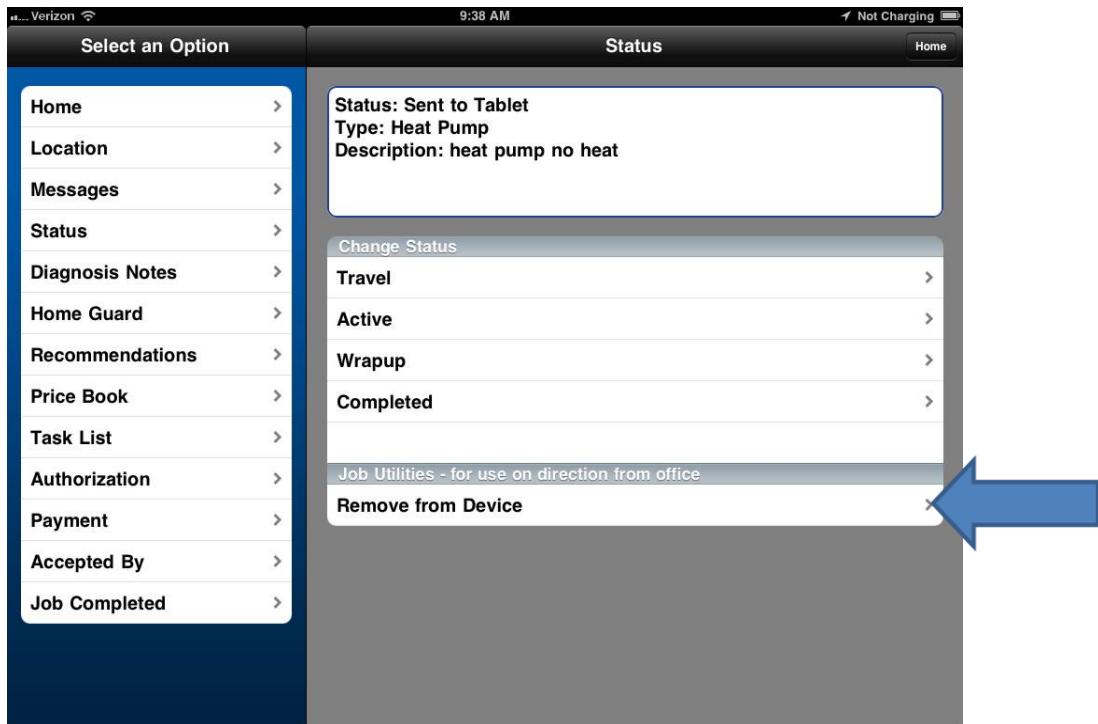
When you select **Completed** from the Change Status Pane, you will be warned that completing a job makes it inaccessible on the iPad. If you are sure you are ready to complete the job, select **OK**.



PLEASE NOTE: By selecting the **OK** Button, the job is sent back to the Service Center and it will no longer be available on the iPad.

8.5 Remove from Device

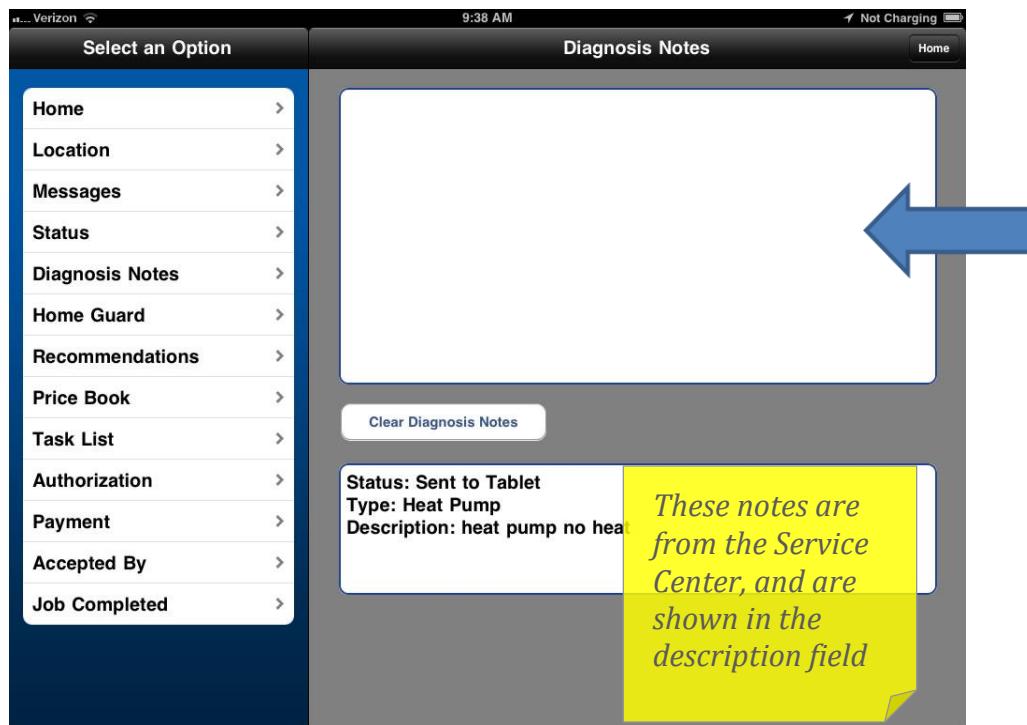
This should only be used if you are instructed to do so from the Service Center.



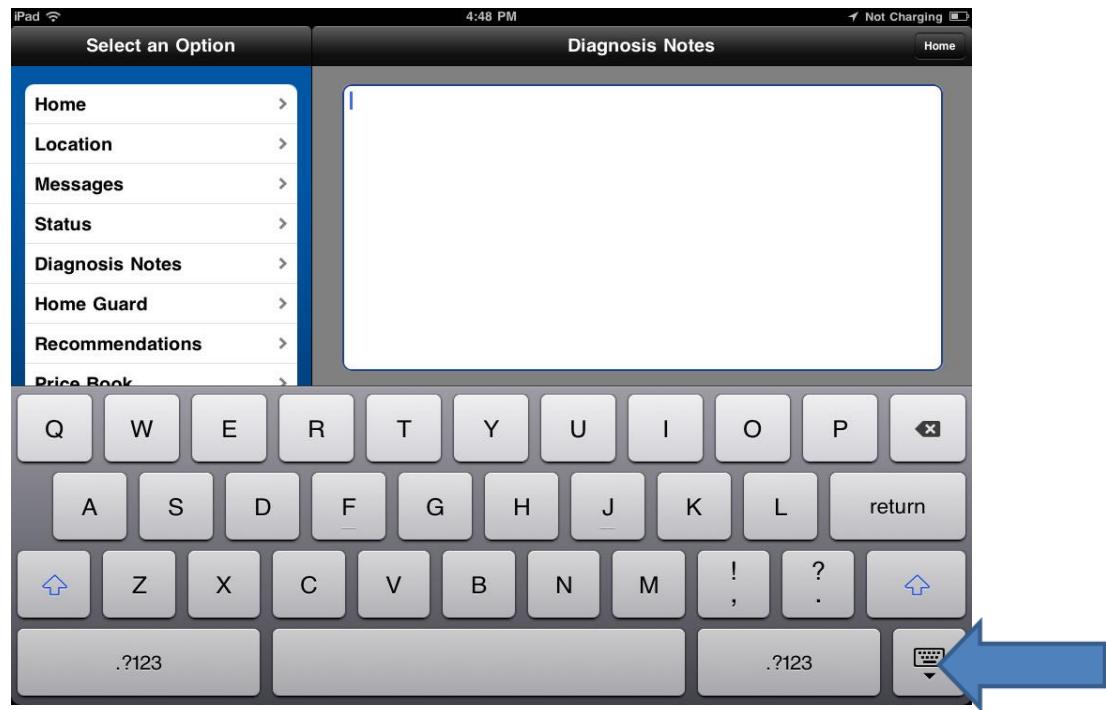
Diagnosis Notes

9.0 Diagnosis Notes

The Diagnosis Notes Pane allows the technician to enter comments related to the current job. For example, "Leak at sink due to cracked basin."



Select Diagnosis Notes Pane to begin adding notes. Once complete, select the keyboard icon (indicated below) to close the keyboard.

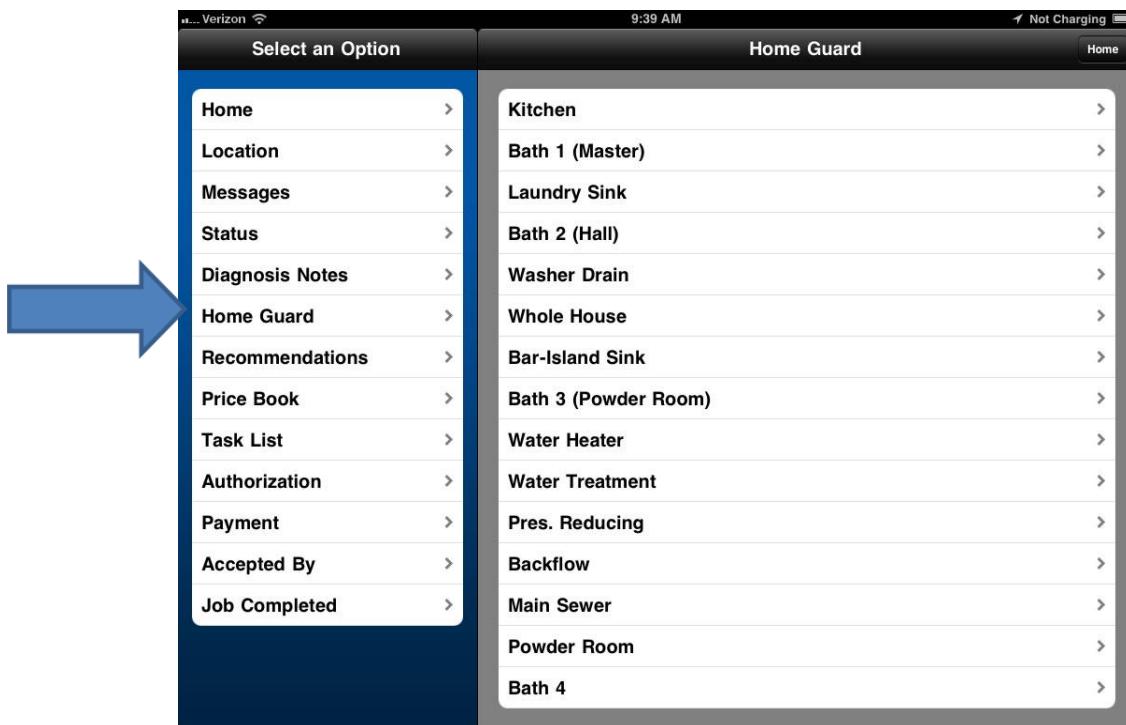


HomeGuard Screen

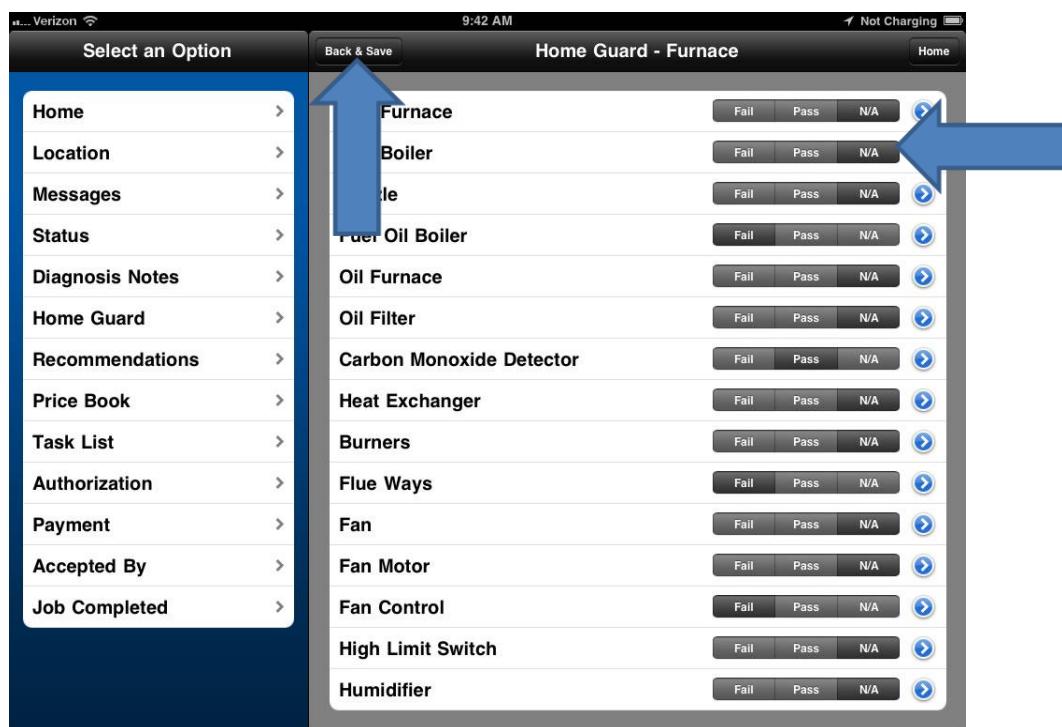
10.0 HomeGuard

The HomeGuard screen allows the technician to assign a Pass or Fail rating to any inspected item.

Select the HomeGuard tab to open the list of areas available for inspection.



Once you have selected the desired area, you may now rate items by selecting the “Pass”, “Fail” or “N/A” buttons. Select the **Back & Save** to go back to the HomeGuard Screen.



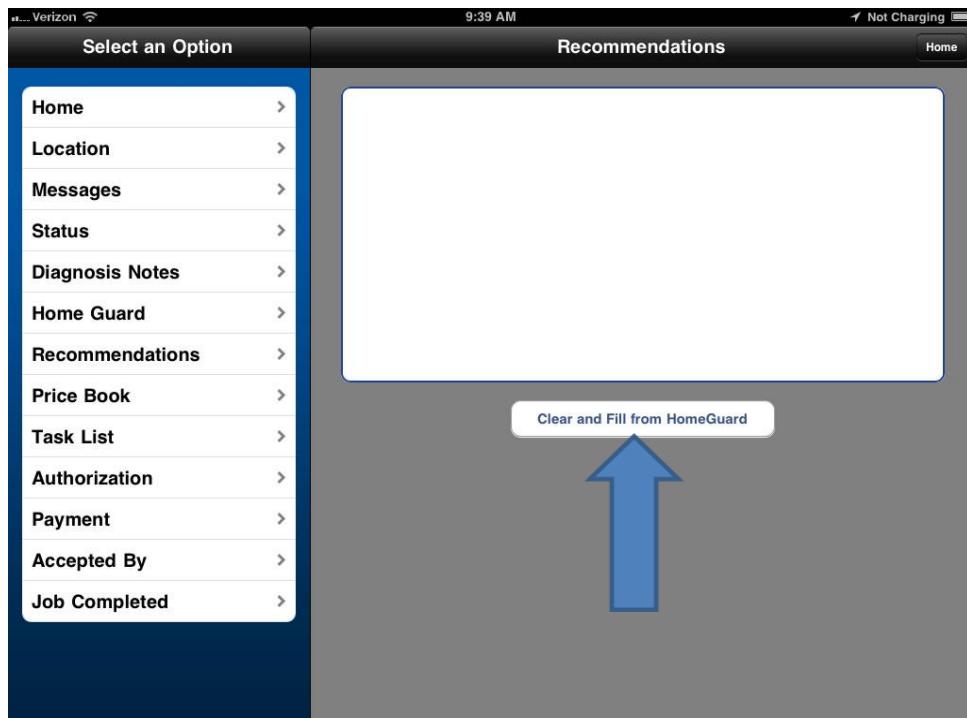
Recommendation Screen

11.0 Recommendations

The **Recommendations** screen allows the technician to record their recommendations, based upon the results of the job inspection.

Select the Recommendations box to begin typing. You may also add in a list of any items which failed inspection on the **HomeGuard** Tab by selecting the **Clear and Fill from Homeguard** button.

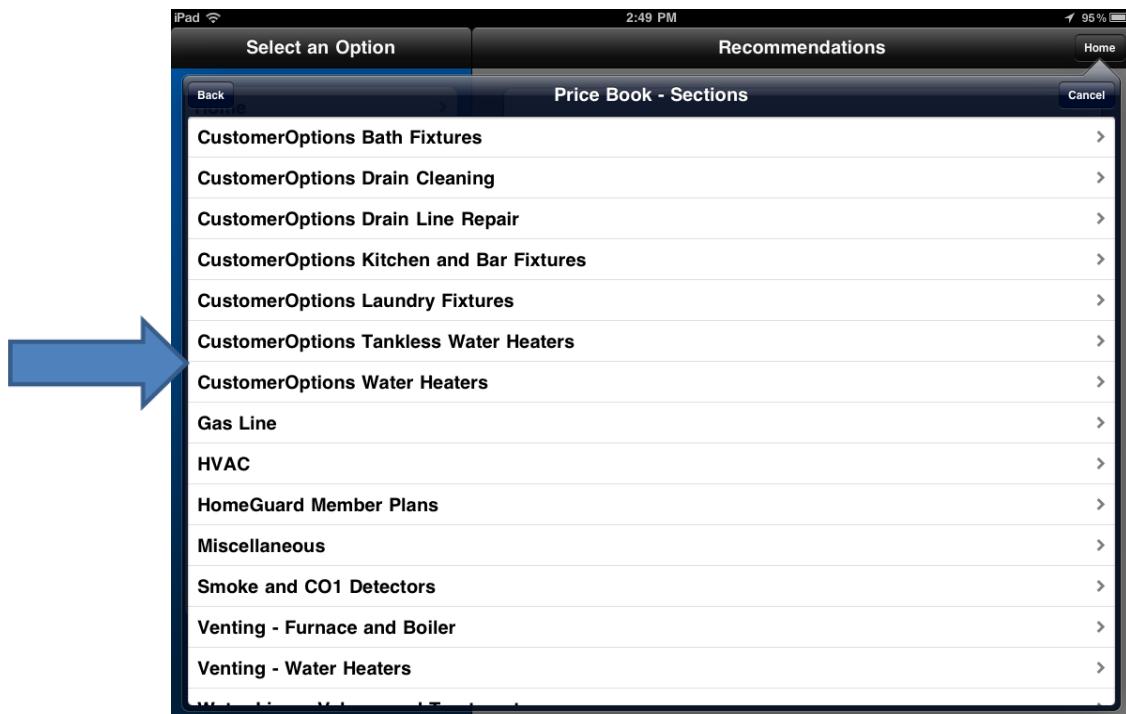
It is important to note that this button will clear any existing text. Therefore, you should select this button **BEFORE** typing in your recommendations.



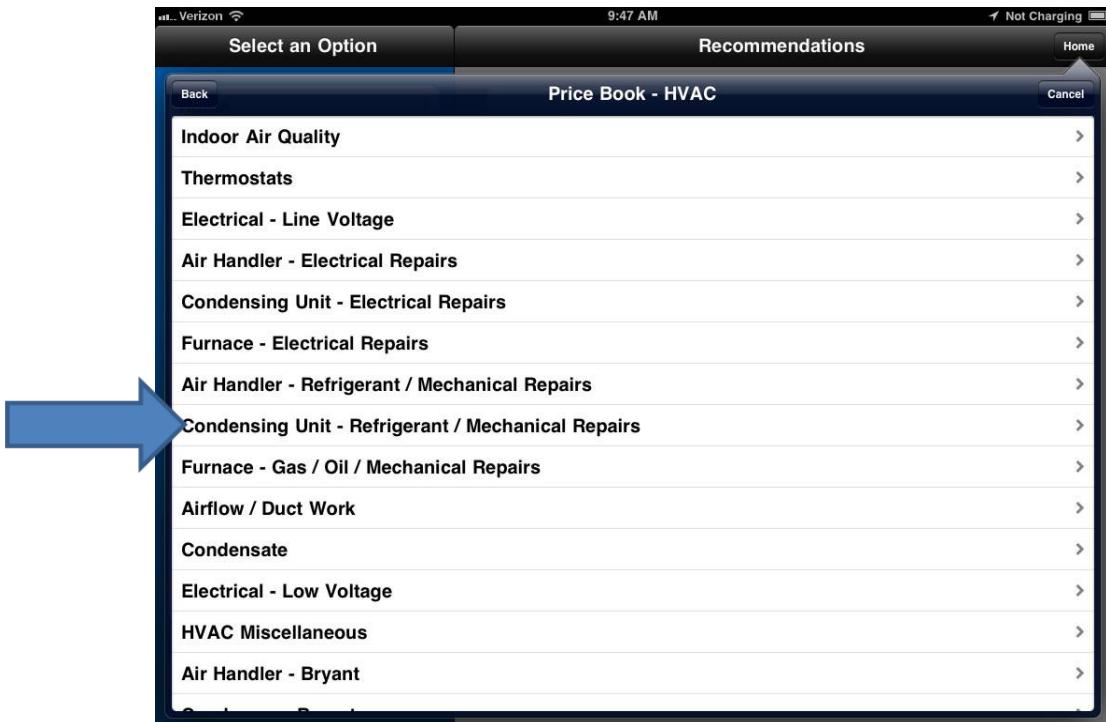
Price Book Screen

12.0 Price Book Screen

The Price Book Screen allows the technician to select from any task available in your Price Book. To locate a task, begin by selecting the appropriate section from the Price Book.



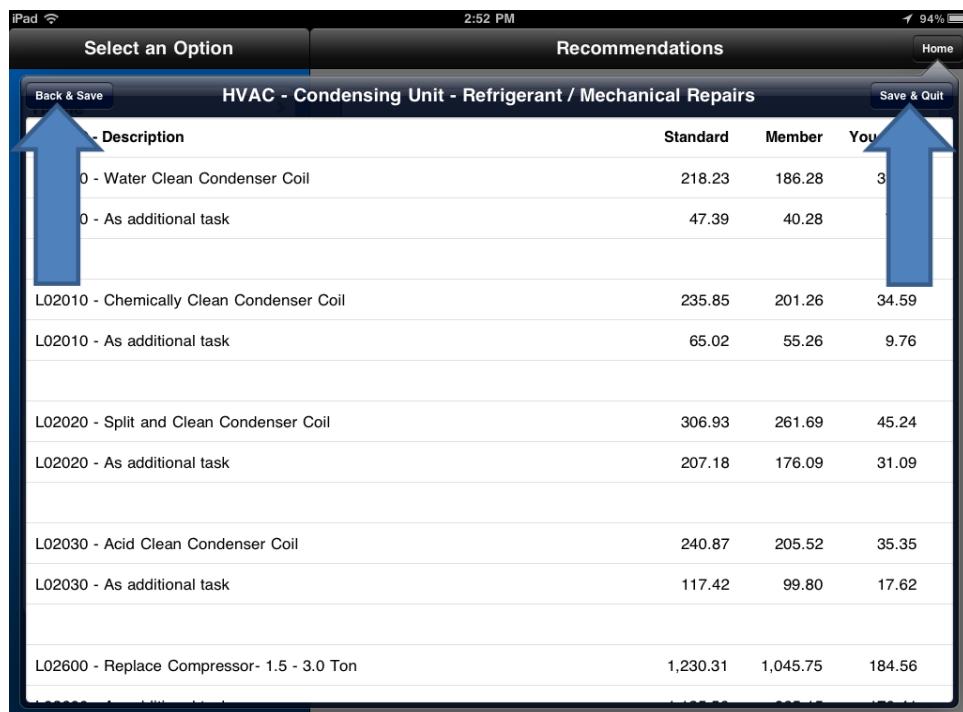
Once the appropriate section has been selected, the screen will display the available sub-sections. You may now select the sub-section containing the desired task.



You may now add a task (or tasks) to the task list by selecting from those available on the screen.

To **add a task from another section of the Price Book**, select the **Back & Save** button. This will save the task to the task list and return you to the previous sub-section.

Once you have added all necessary tasks to the task list, select **Save & Quit**. This will close the Price Book and open the task list.



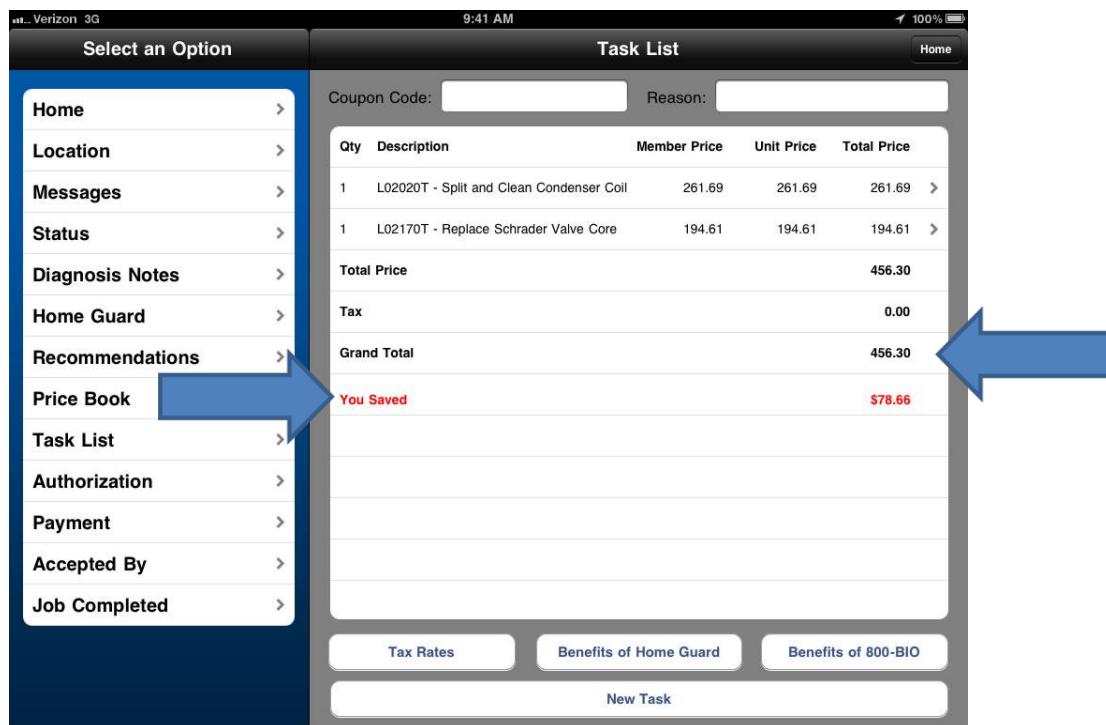
The screenshot shows a mobile application interface for an iPad. At the top, there are navigation buttons: 'Select an Option', 'Recommendations', and 'Home'. Below this is a header bar with the text 'HVAC - Condensing Unit - Refrigerant / Mechanical Repairs'. On the left side of the main content area, there is a 'Back & Save' button. On the right side, there is a 'Save & Quit' button. The main content area displays a table of tasks with columns for Description, Standard, Member, and You. The tasks listed are:

Description	Standard	Member	You
0 - Water Clean Condenser Coil	218.23	186.28	3
0 - As additional task	47.39	40.28	
L02010 - Chemically Clean Condenser Coil	235.85	201.26	34.59
L02010 - As additional task	65.02	55.26	9.76
L02020 - Split and Clean Condenser Coil	306.93	261.69	45.24
L02020 - As additional task	207.18	176.09	31.09
L02030 - Acid Clean Condenser Coil	240.87	205.52	35.35
L02030 - As additional task	117.42	99.80	17.62
L02600 - Replace Compressor- 1.5 - 3.0 Ton	1,230.31	1,045.75	184.56

NOTE: If you do not select Back & Save, or Save & Quit, your tasks will not be added to the task list on the customer invoice.

Task List Screen

13.0 Task List Screen



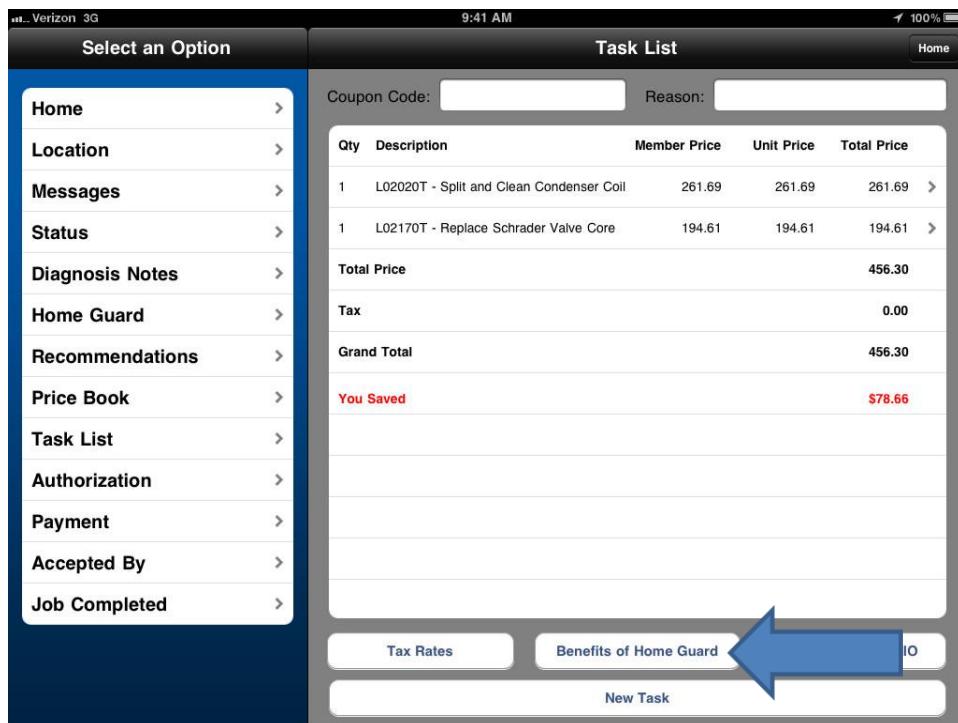
Select the **Task List** tab. Once you have priced the job in **Home Guard** or the **Price Book**, the customer will see the Grand Total of the job.

Additionally, the Task List will display the savings for Service Plan members, or the projected savings for non-members if they become plan members.

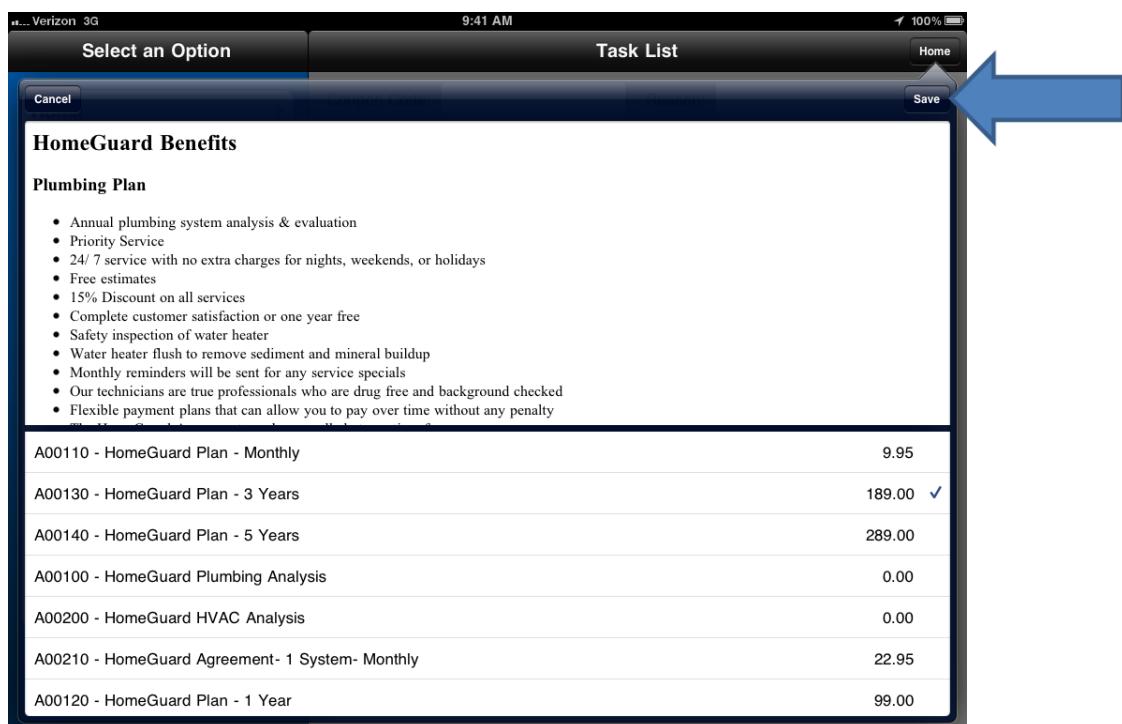
NOTE: The customer will see the tasks performed, but they will NOT see the parts and labor that make up those tasks **in a flat rate price book**.

13.1 Benefits of HomeGuard/Service Plans

Select **Benefits of HomeGuard** to show the customer all the benefits of the service plan membership.

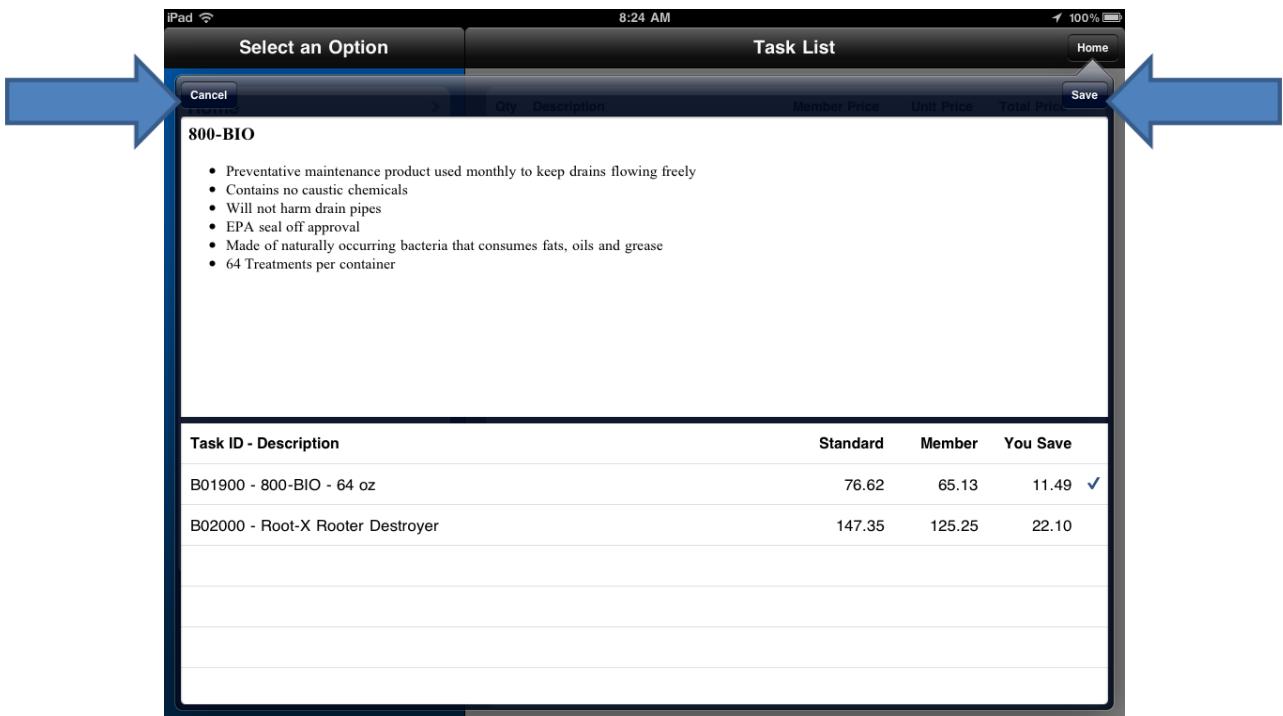


After the customer chooses a plan, select the **Save** button.



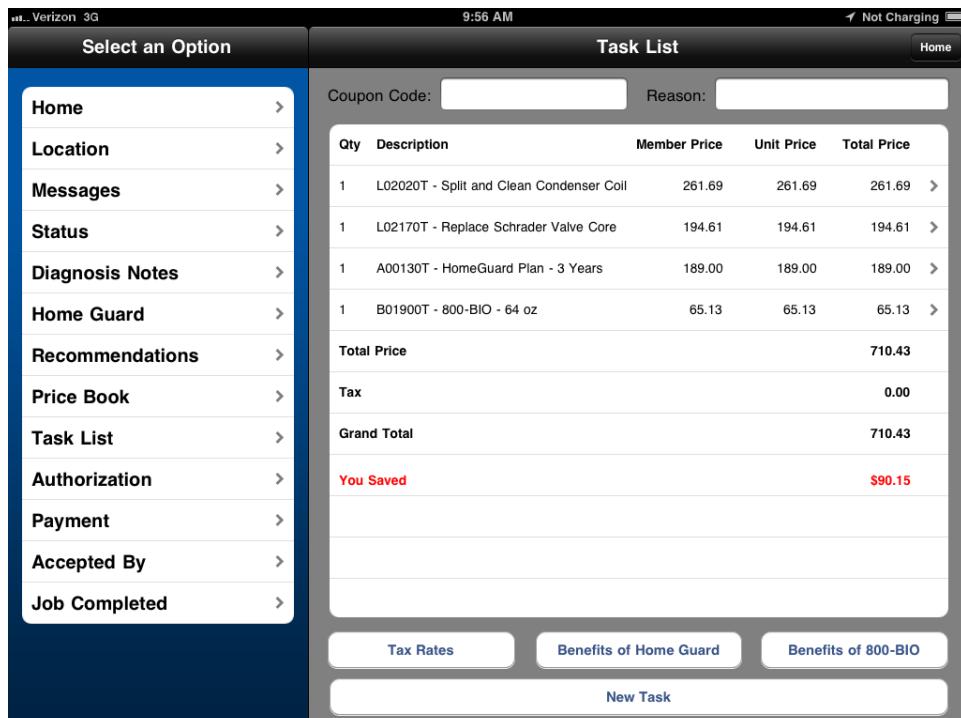
13.2 Benefits of 800-BIO

Select the 800-BIO tab to display the benefits of 800-BIO. If the customer chooses to purchase 800-BIO, select **Save**. If they decline select **Cancel**.



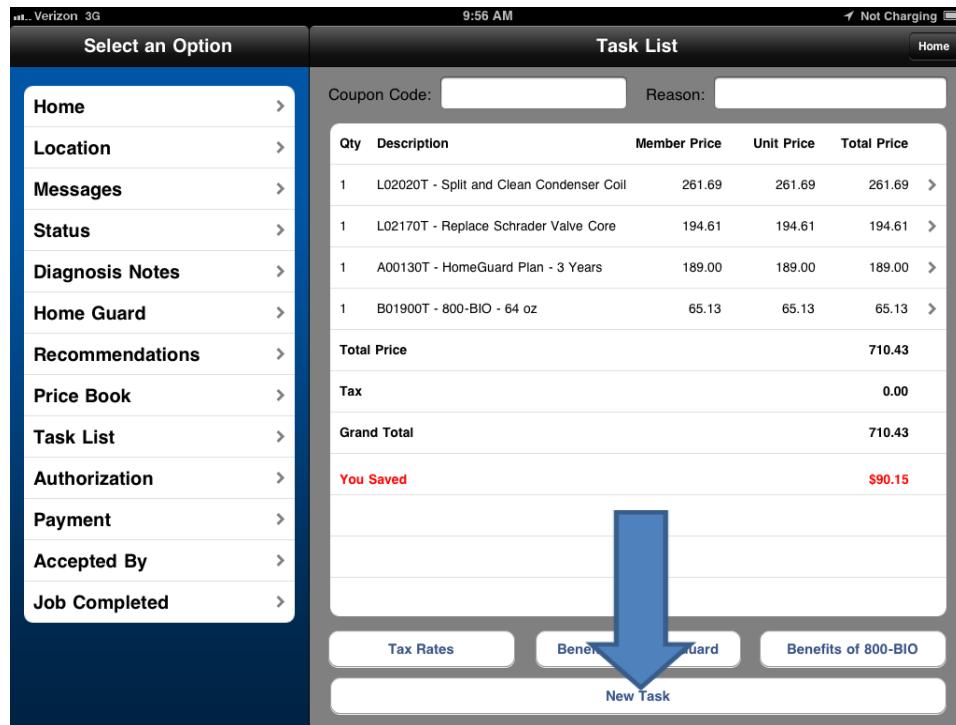
13.3 Task List

Once the Service Plan and the 800-BIO have been added, the iPad will calculate the new price and show the customer what they have saved.

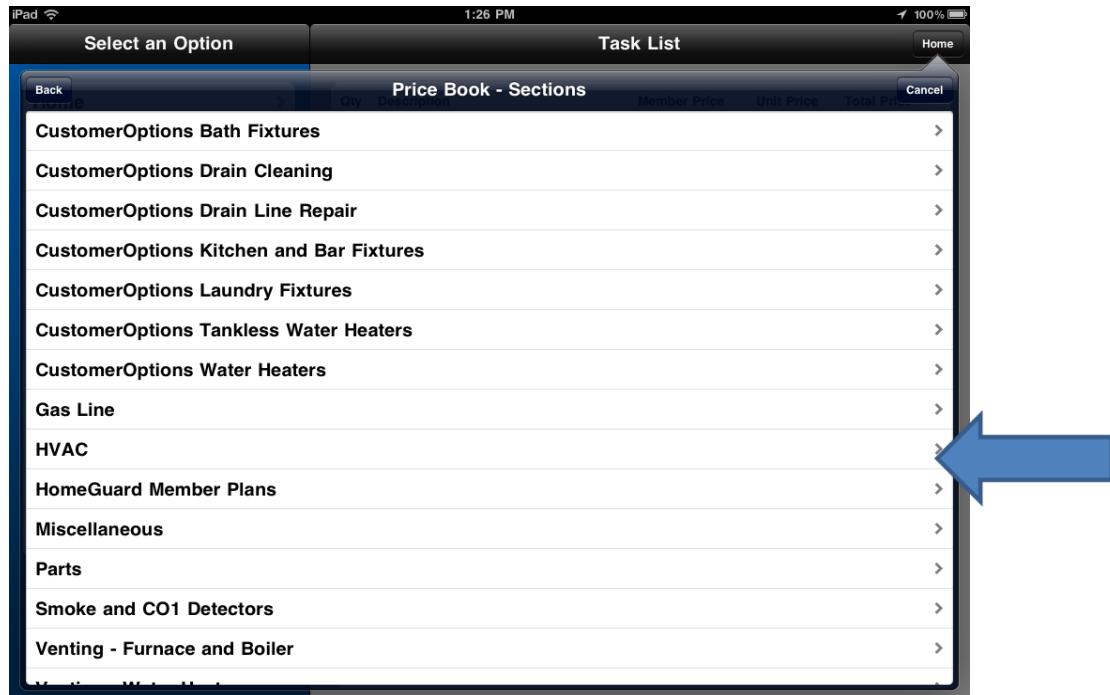


13.4 Adding a Task (if necessary)

Should the customer ask you to add a task to the current job, select the **New Task Button**.



The Price Book will open, allowing you to select the desired task or tasks.



Choose the appropriate tasks and then select **Save & Quit** to add that task (or tasks) to the task list.

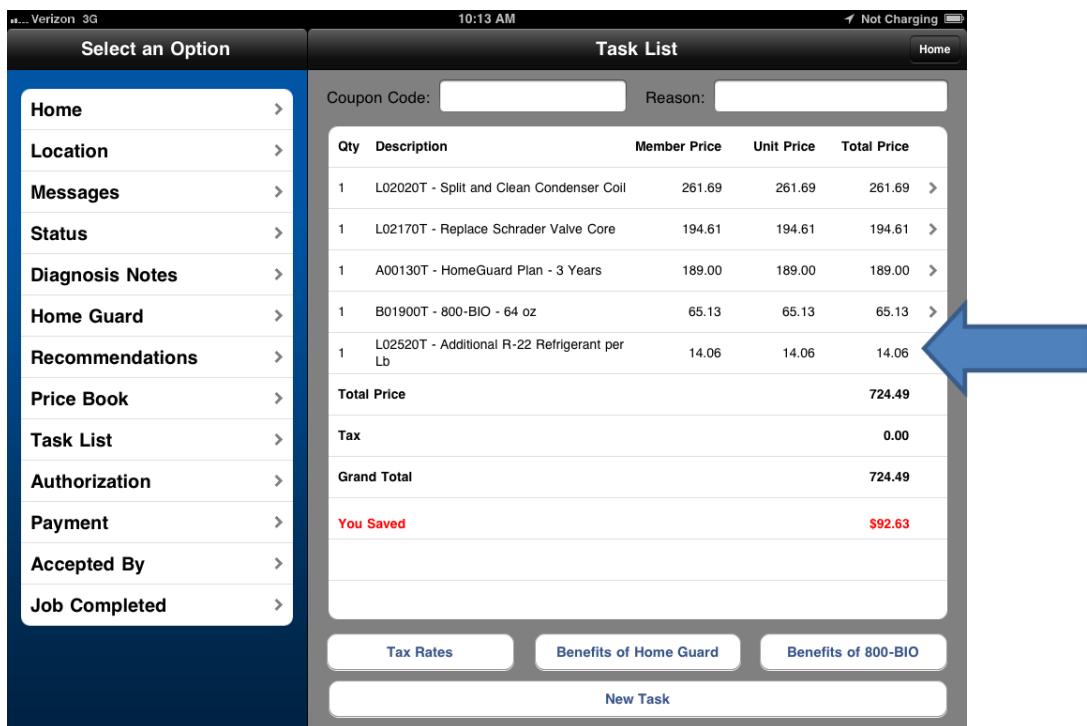
HVAC - Condensing Unit - Refrigerant / Mechanical Repairs			
L02510 - R-22 Refrigerant- 1st Lb	225.29	192.28	33.01
L02510 - As additional task	54.45	46.28	8.17
L02520 - Additional R-22 Refrigerant per Lb	16.54	14.06	2.48
L02520 - As additional task	16.54	14.06	2.48
L02530 - 410-A Refrigerant- 1st Lb	296.36	252.71	43.65
L02530 - As additional task	196.61	167.11	29.50
L02540 - Additional 410-A Refrigerant per Lb	16.54	14.06	2.48 ✓
L02540 - As additional task	16.54	14.06	2.48
L02550 - Recharge Complete R-22 System- 1.5 - 3.0 Ton	289.30	246.70	42.60
L02550 - As additional task	189.55	161.10	28.45

The new total will be calculated and displayed on the task list screen for the customer.

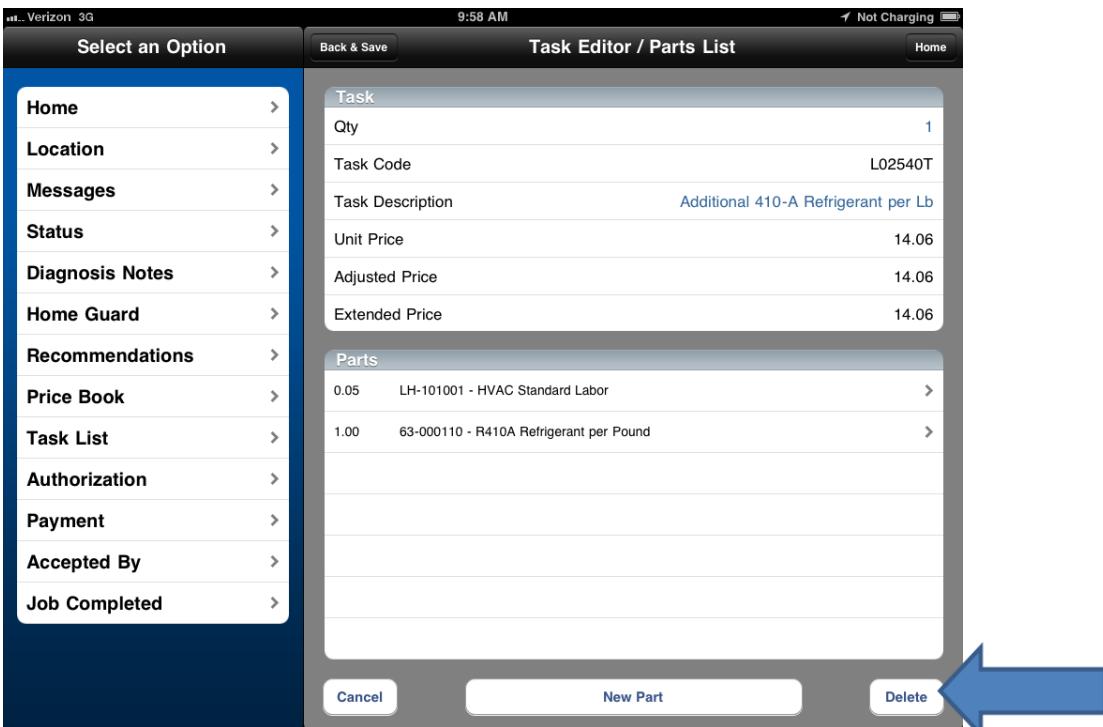
Task List						
		Coupon Code:	Reason:			
Qty	Description	Member Price	Unit Price	Total Price		
1	L02020T - Split and Clean Condenser Coil	261.69	261.69	261.69 >		
1	L02170T - Replace Schrader Valve Core	194.61	194.61	194.61 >		
1	A00130T - HomeGuard Plan - 3 Years	189.00	189.00	189.00 >		
1	B01900T - 800-BIO - 64 oz	65.13	65.13	65.13 >		
1	L02520T - Additional R-22 Refrigerant per Lb	14.06	14.06	14.06 >		
Total Price				724.49		
Tax				0.00		
Grand Total				724.49		
You Saved				\$92.63		
Tax Rates		Benefits of Home Guard	Benefits of 800-BIO			
New Task						

13.5 To Remove an item from the Task List

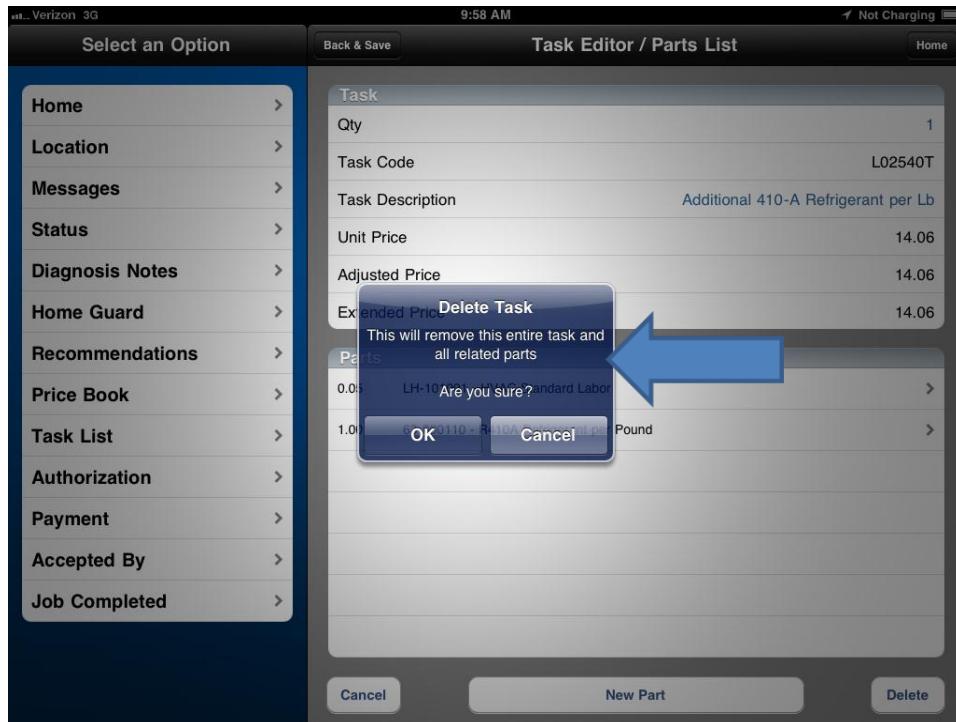
To delete an item from the task list, select the task you wish to remove.



Confirm that the task displayed on the Task Editor screen is the correct task for removal. Select the **Delete** button to remove the task.

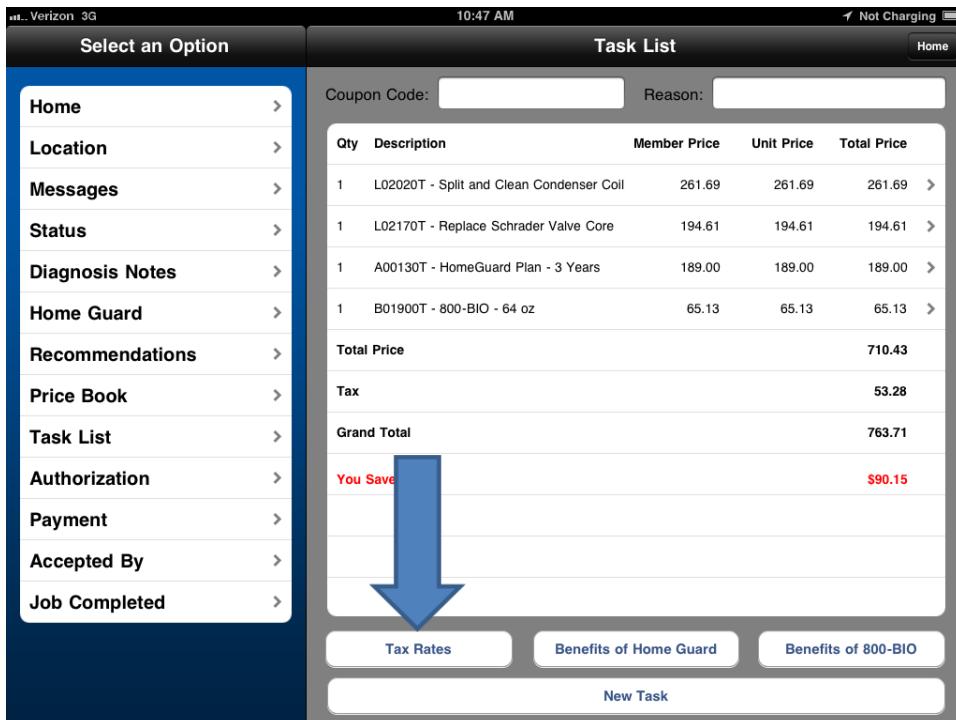


You will be asked to confirm that you wish to delete the indicated task. Select **OK** to delete the task, or **CANCEL** if you do not wish to delete the task.

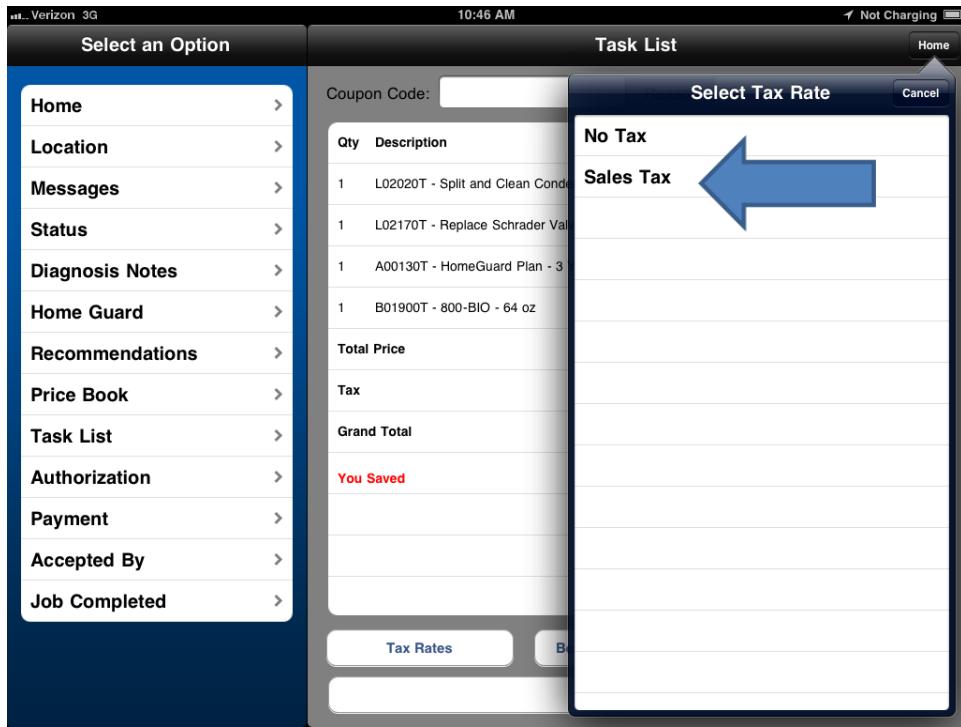


13.6 Sales Tax

Select the **Tax Rates** button to open the tax rates menu and add sales tax if applicable.



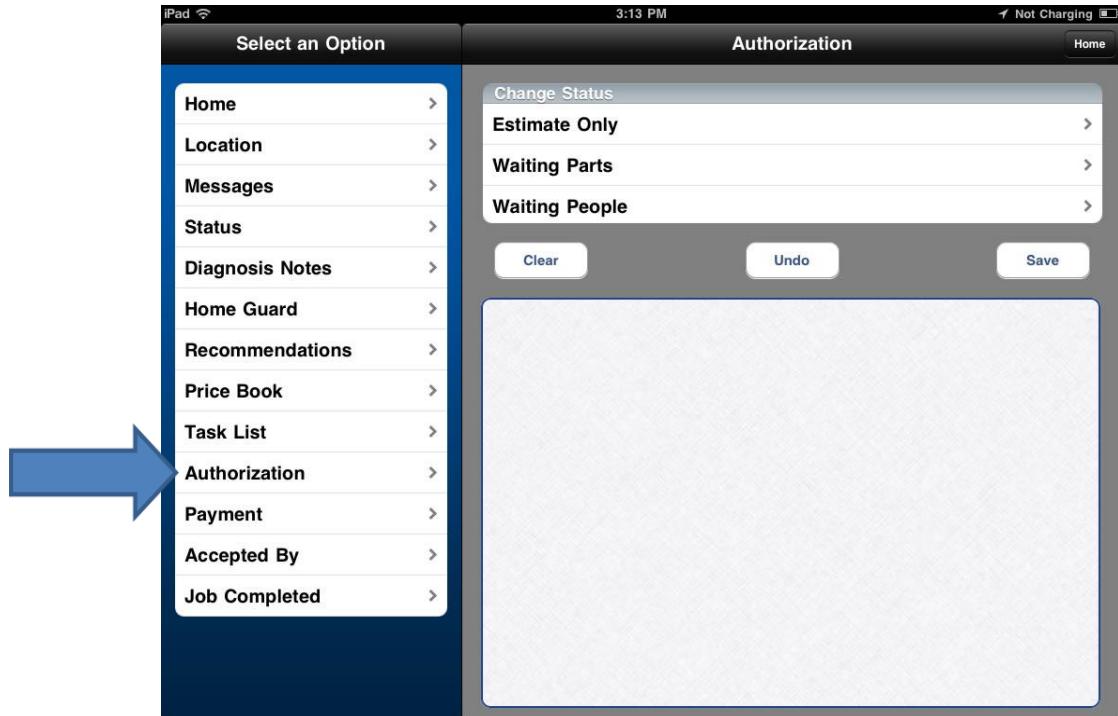
Select Sales Tax from the menu to add the appropriate sales tax if applicable.



Authorization Screen

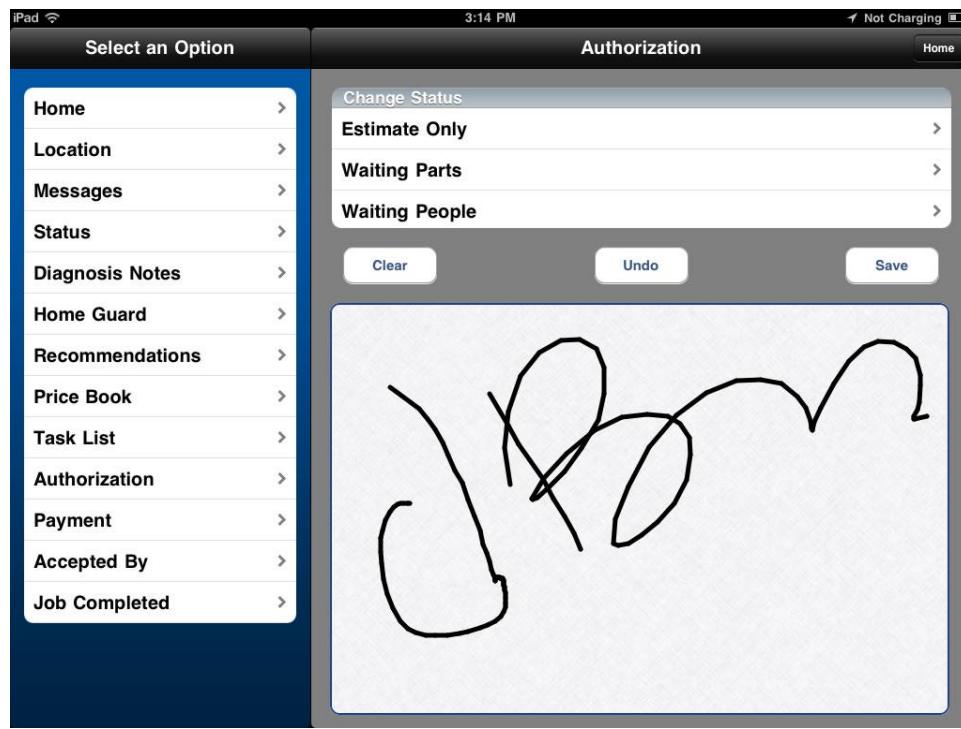
14.0 Authorization Screen

The Authorization Screen is used to capture customer permission and signatures, in order to authorize work.



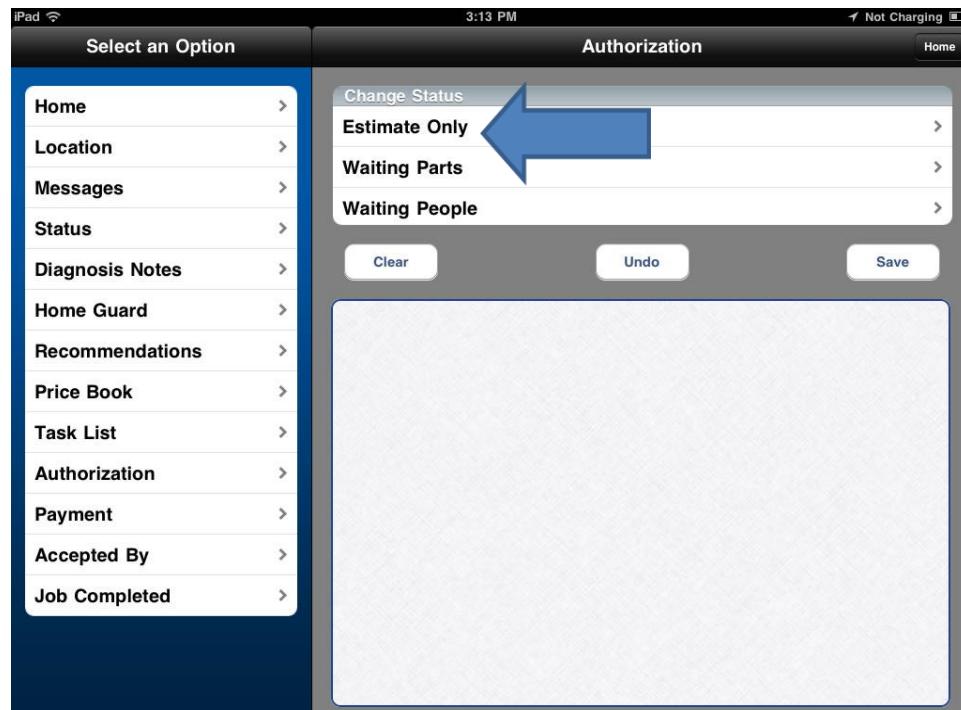
14.1 Proceed with the Work

Once both the scope of work and the price have been agreed upon, the customer can sign their name to authorize work by tracing their signature in the signature box.

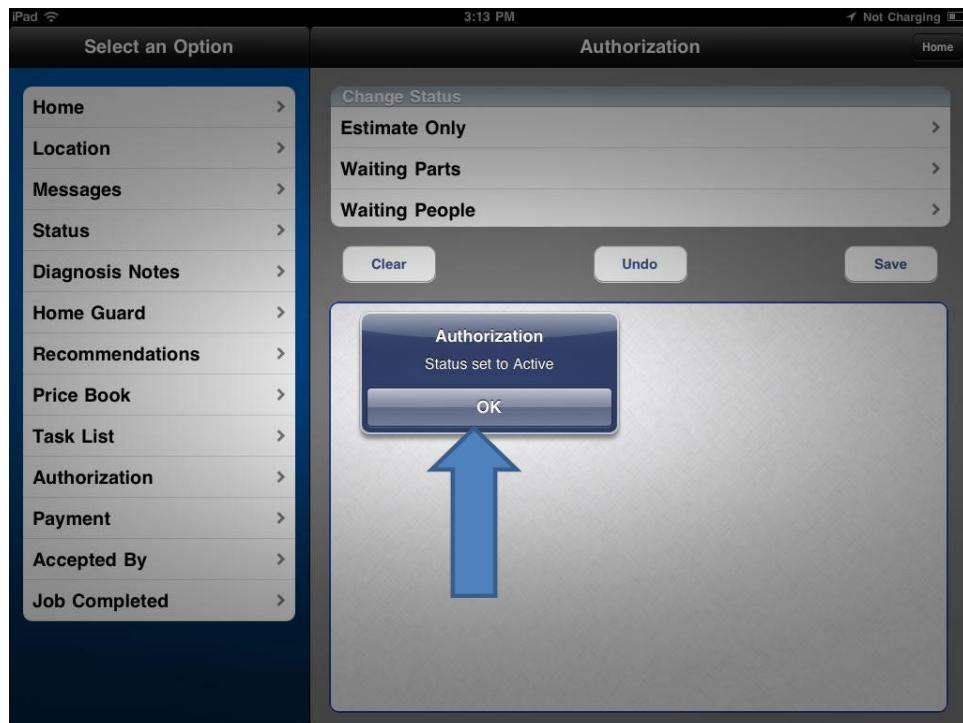


14.2 For Estimates Only

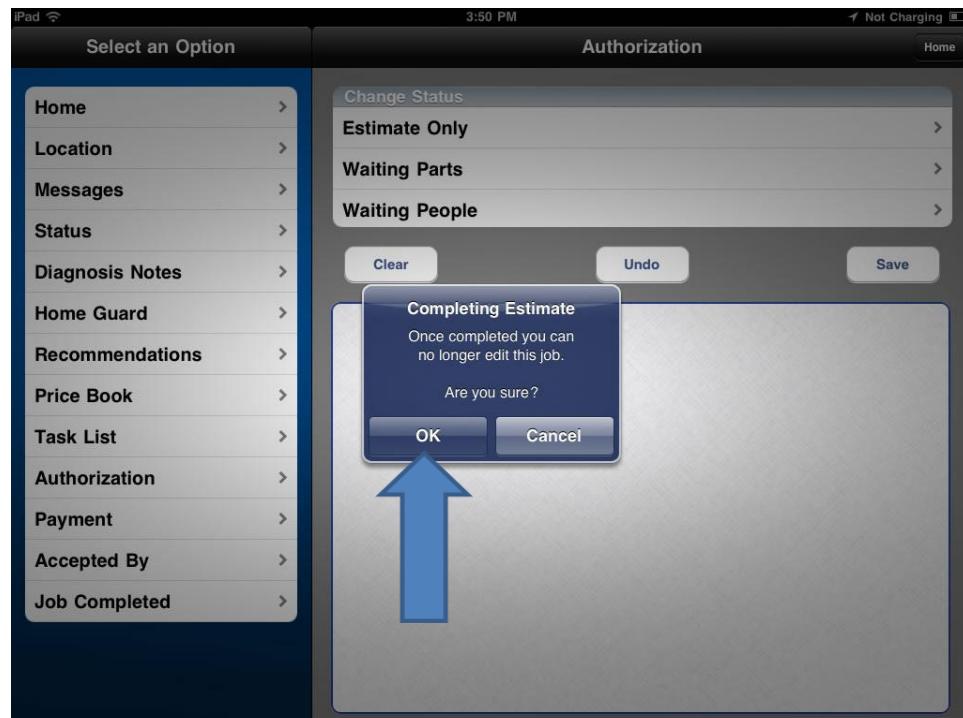
If the customer only wants an estimate, select the **Estimate Only** Button at the top of the screen.



When you select **Estimate Only**, the application will set this status to Active.



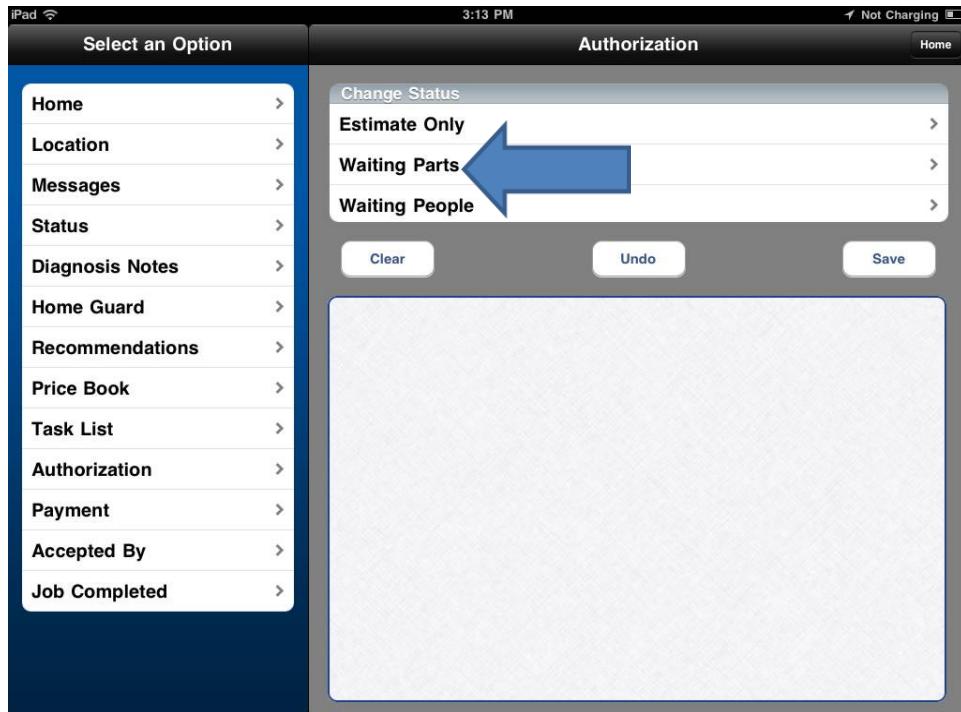
You will then be asked to confirm that you wish to complete the Estimate.



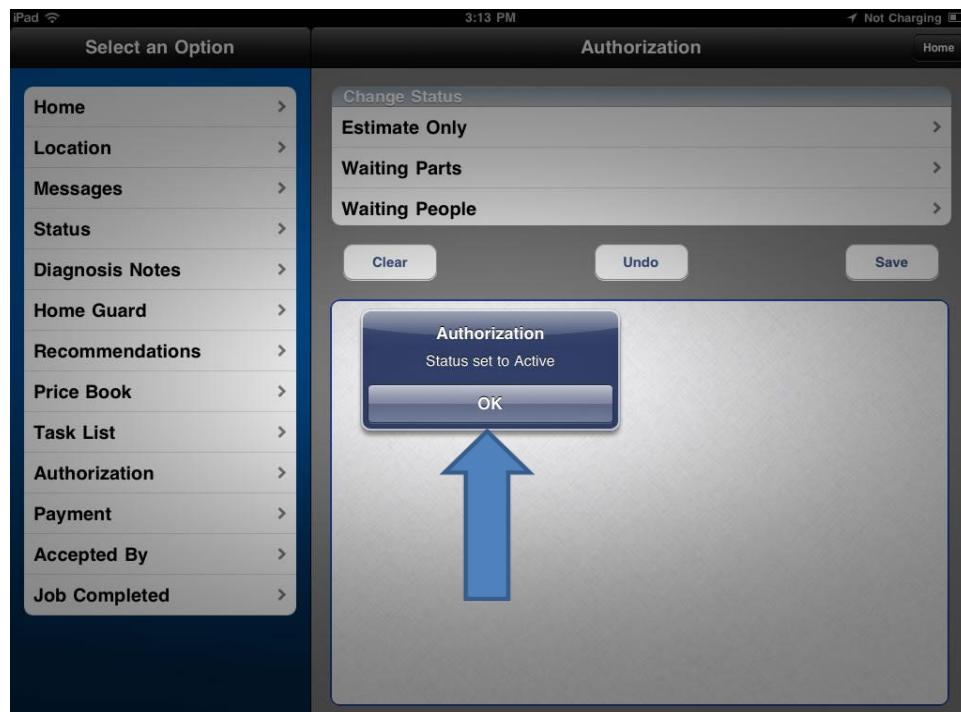
NOTE: Once you select OK, the job will go back to the office and it will no longer be available in the iPad,

14.3 Waiting Parts

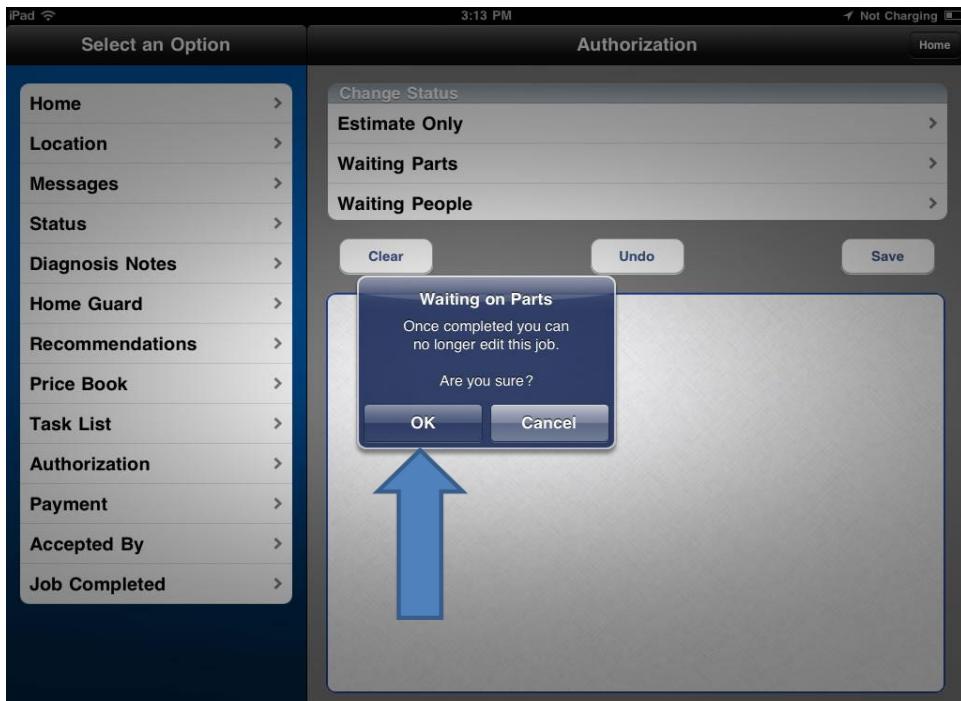
If you need parts to complete the job, select **Waiting Parts**.



When you select **Waiting Parts**, the application will set this status to Active.



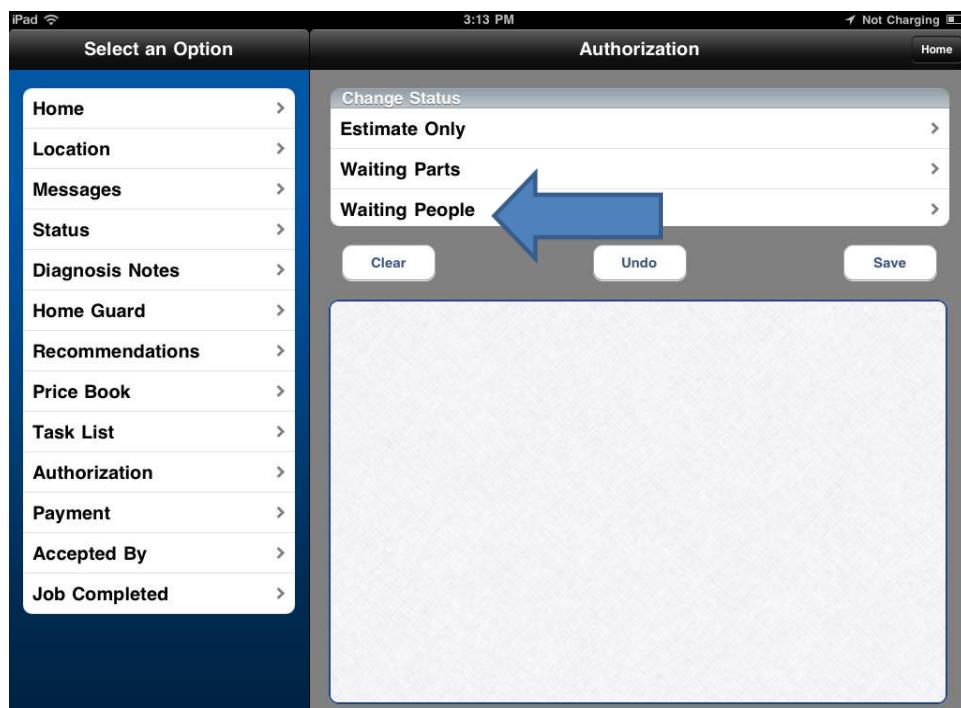
Once you have selected **OK**, you will be asked to confirm your answer.



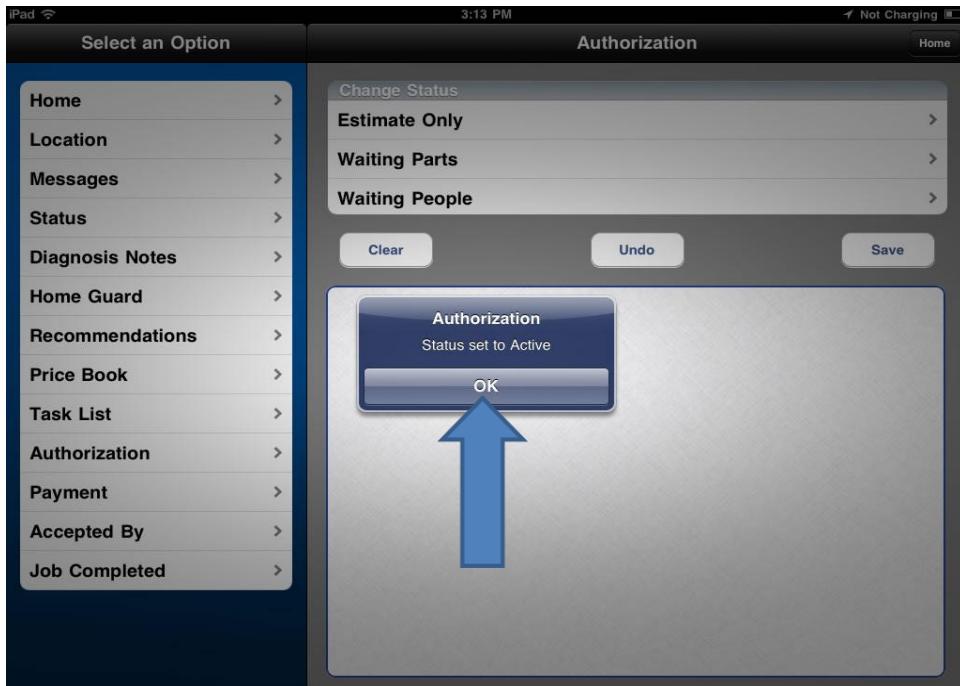
NOTE: If you select the **OK** Button, the job will go back to the office and will no longer be in the iPad.

14.4 Waiting People

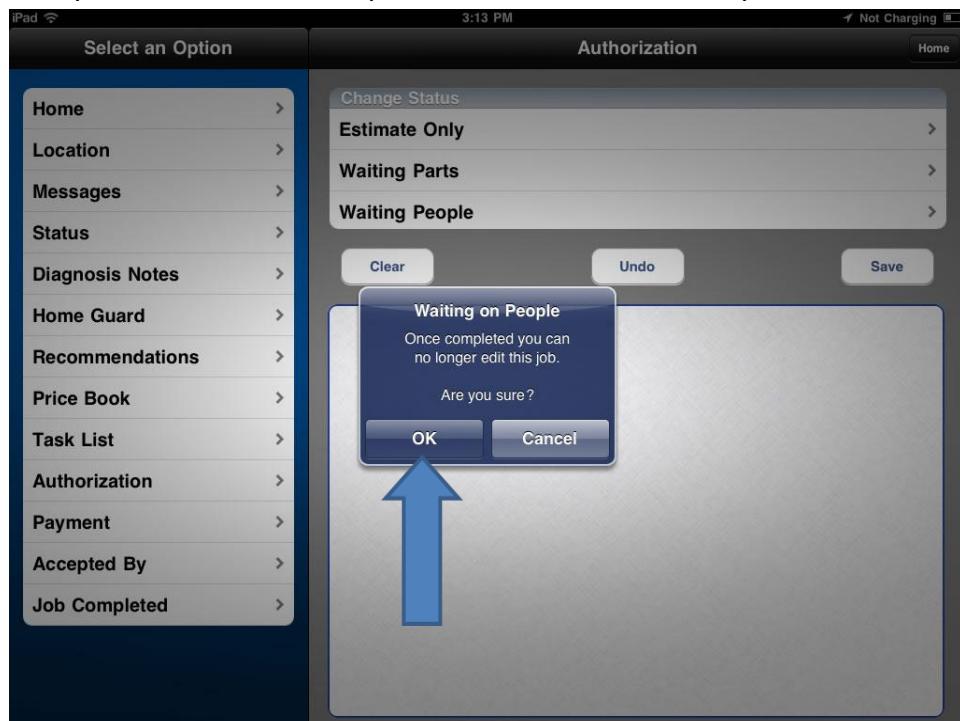
If you need assistance to complete the job touch Waiting People, Touch OK and the iPad will change your status to Active.



When you select the **Waiting People** button, the application will set this status to Active.



Once you have selected OK, you will be asked to confirm your answer.



NOTE: Once you have selected the OK Button, the job will be sent back to the office and will no longer be available in the iPad.

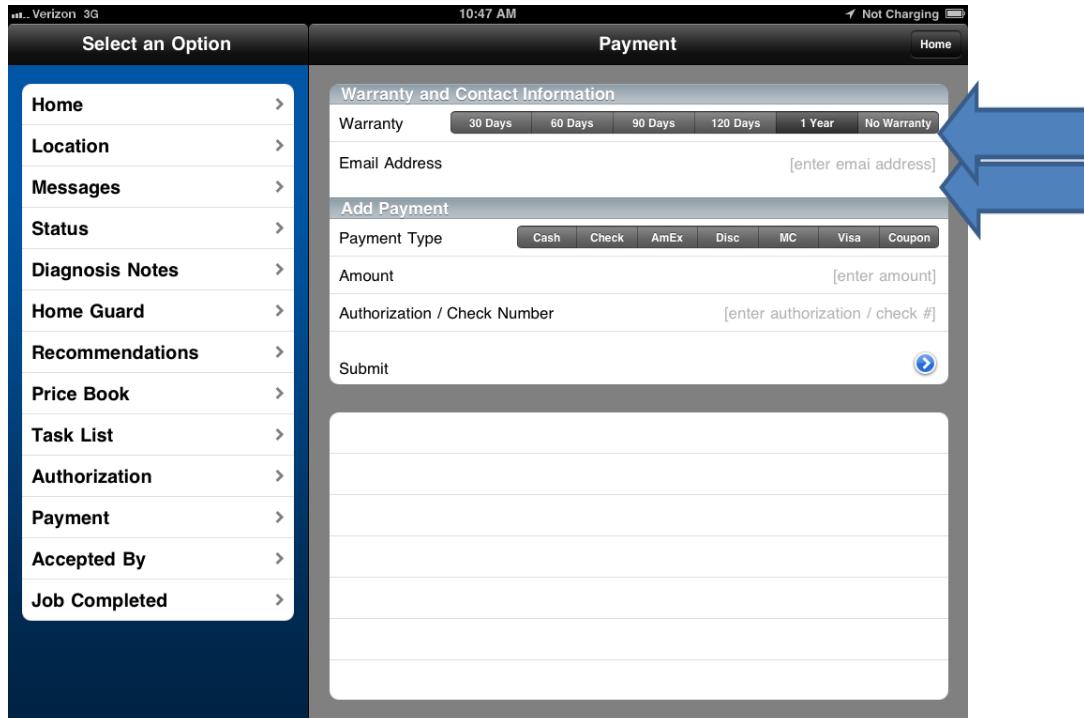
Payment Screen

15.0 Payment Screen

The Payment screen will allow the technician to complete the sale, while collecting the customer's email address and establishing the warranty period.

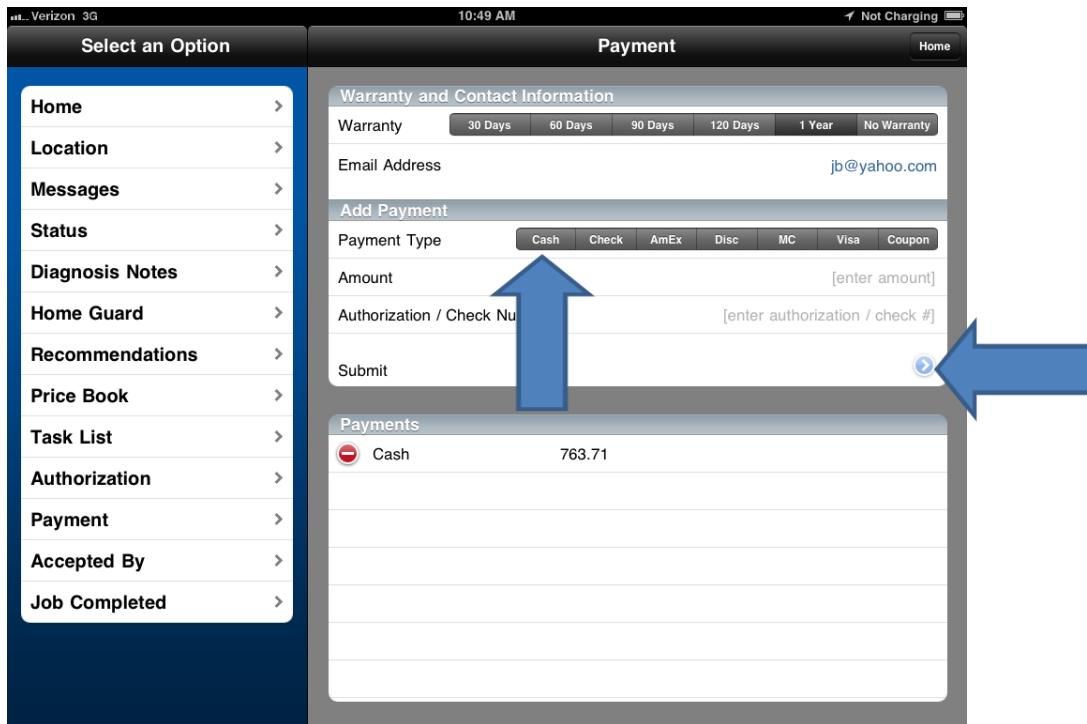
Warranty and Contract information appear at the top of the Payment Screen. The application defaults to One Year for the warranty. To change the warranty information, select the appropriate timeframe.

To enter the customer's email address, select the **[enter email address]** field and type in the email address.

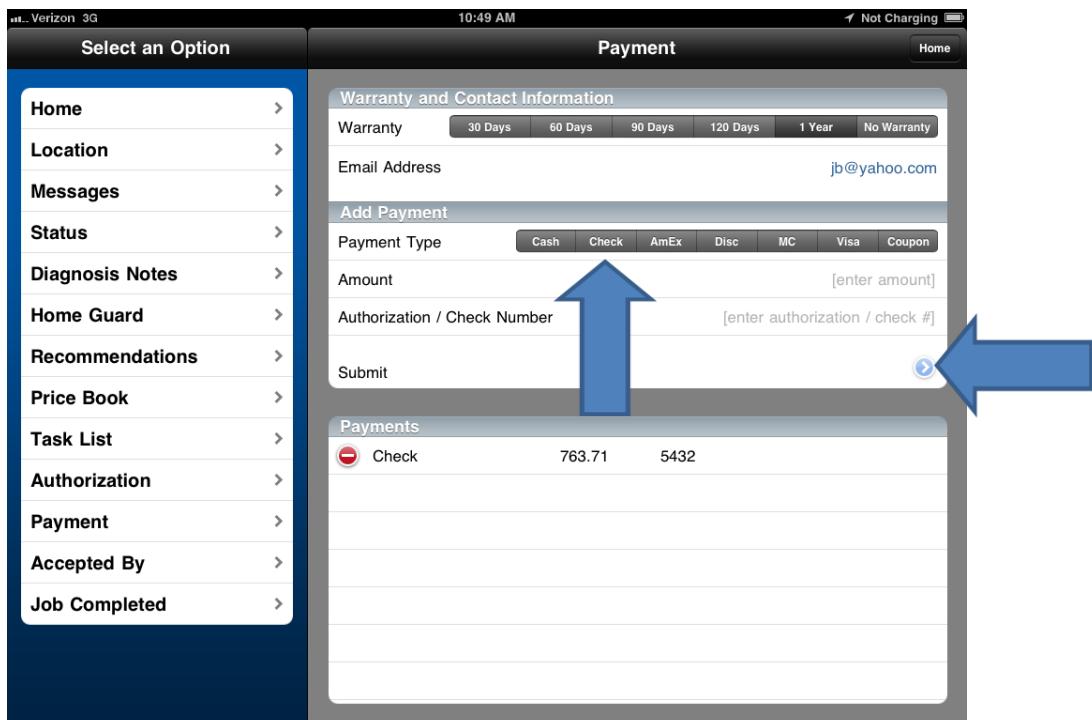


15.1 Cash or Check

For payments by Cash, Select the **Cash** button. Enter the amount of the cash sale and select **Submit**.

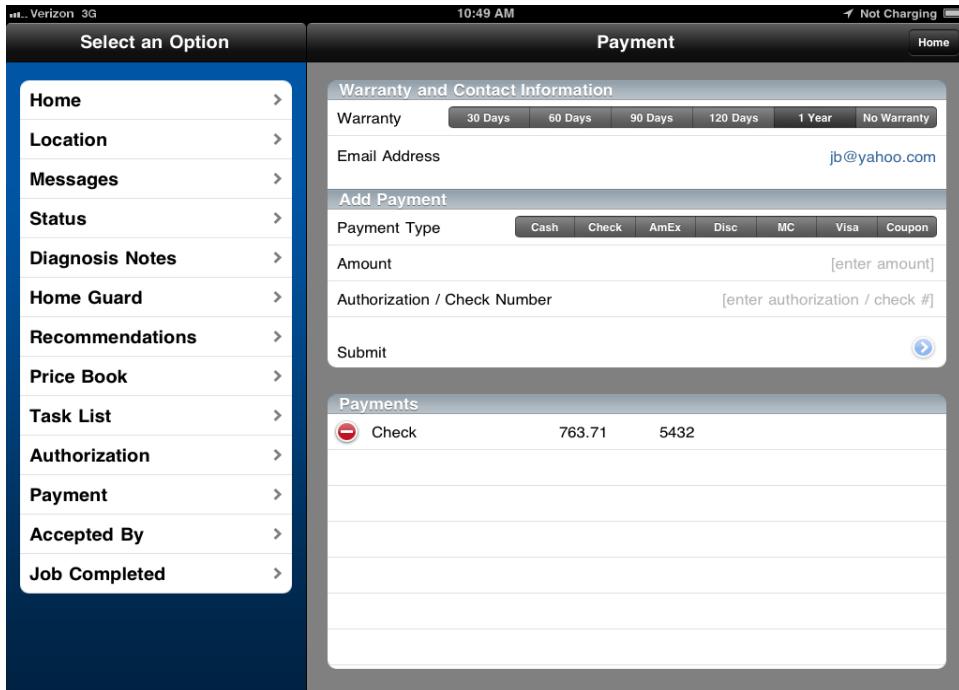


For payment by check, select the **Check** tab. Enter the sale amount and check number then select **Submit**.



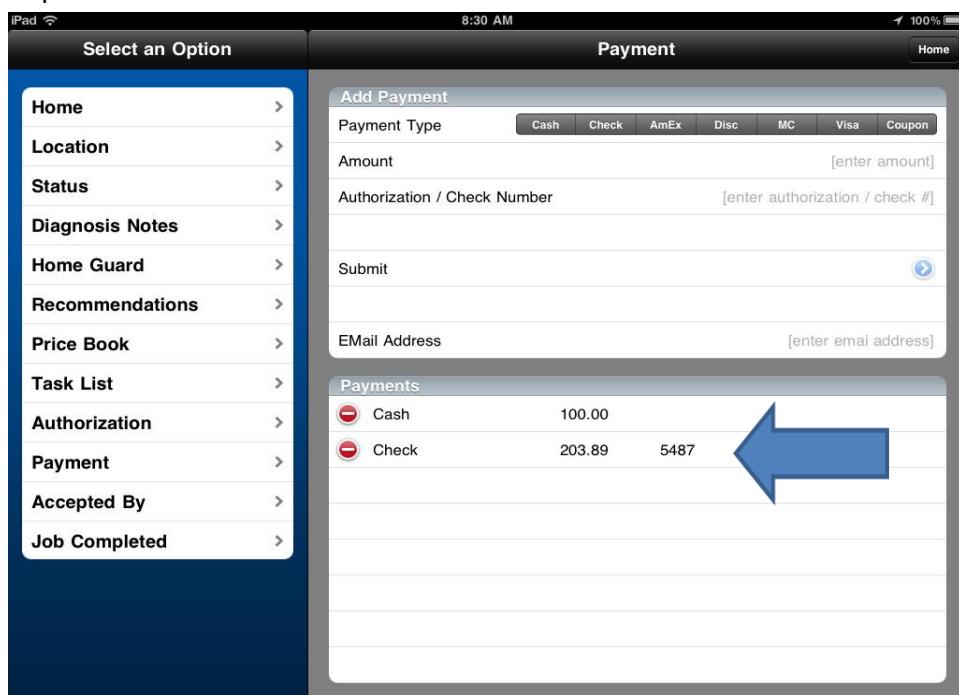
15.2 Credit Card Payment

For credit card payments, select the appropriate credit card type. Next enter the sale amount and the authorization number, and then select **Submit**.



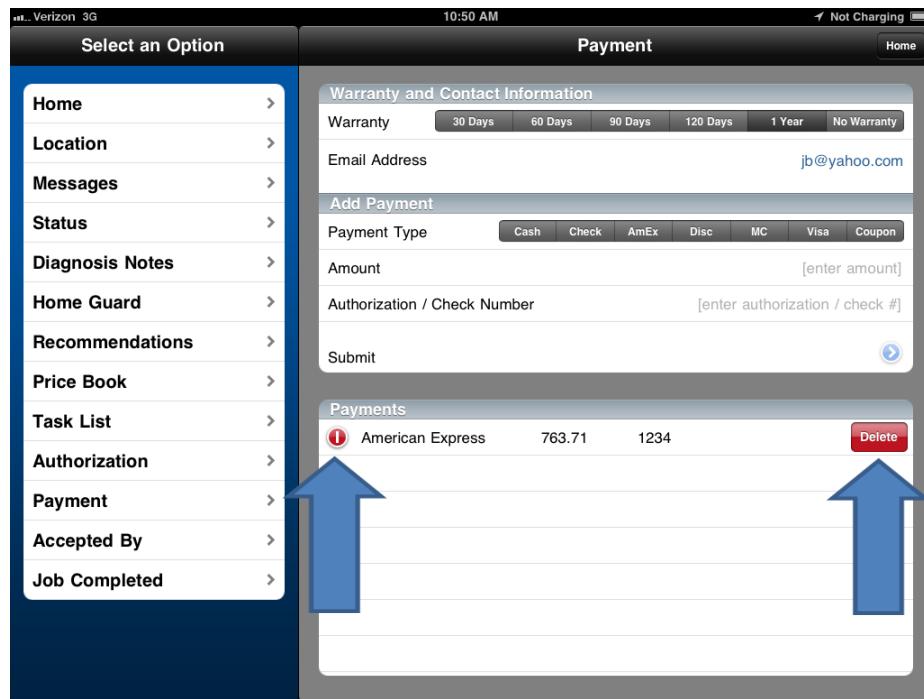
15.3 Multiple forms of Payment

For multiple forms of payment, simply repeat the process for each payment type. When you select **Submit**, the payment is added to the payments box. And the Amount will update to reflect what is still owed.



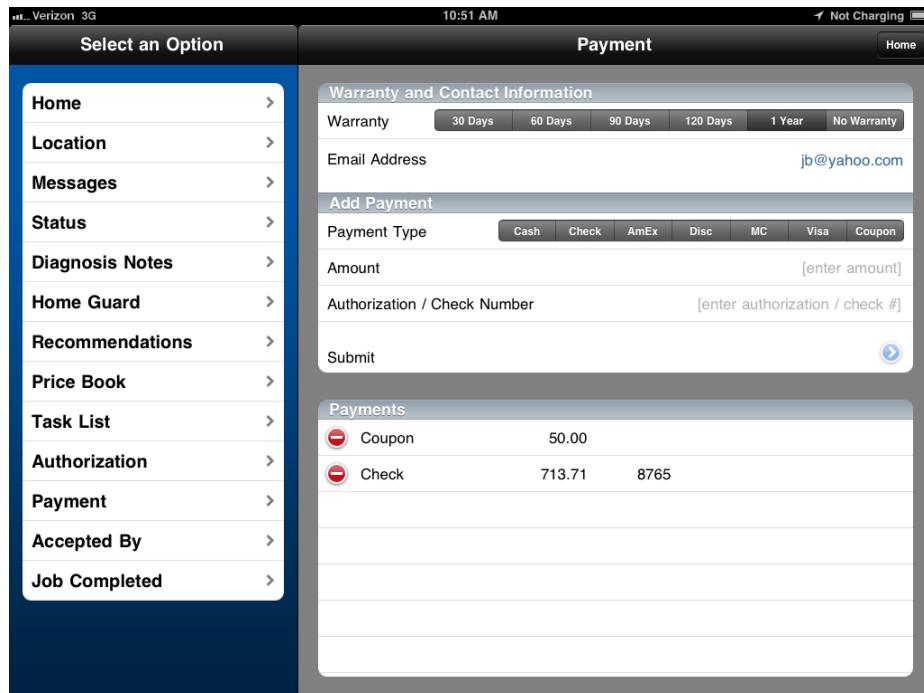
15.4 Deleting a Payment

If for any reason you need to delete a payment, first select the red circle with the minus sign. Next, select the **Delete** button and the item will be removed.



15.5 Honoring a Discount Coupon

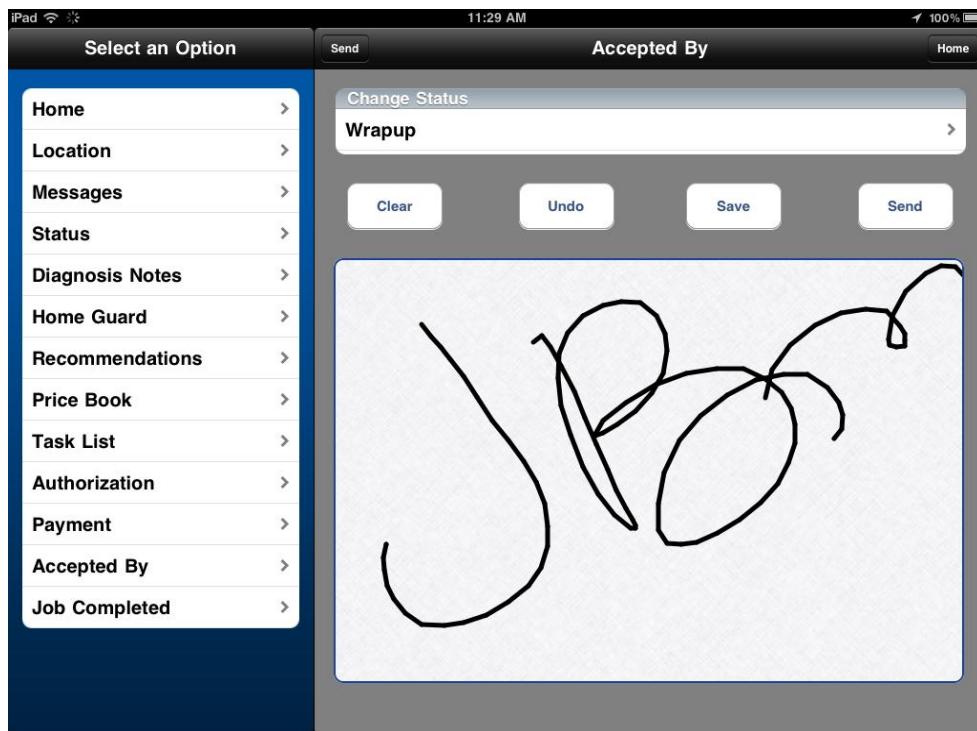
For coupons, select the **Coupon** button from the payment bar, enter the amount of the discount and select **Submit**. The coupon will be added to the payment box and the amount due will be updated.



Accepted By

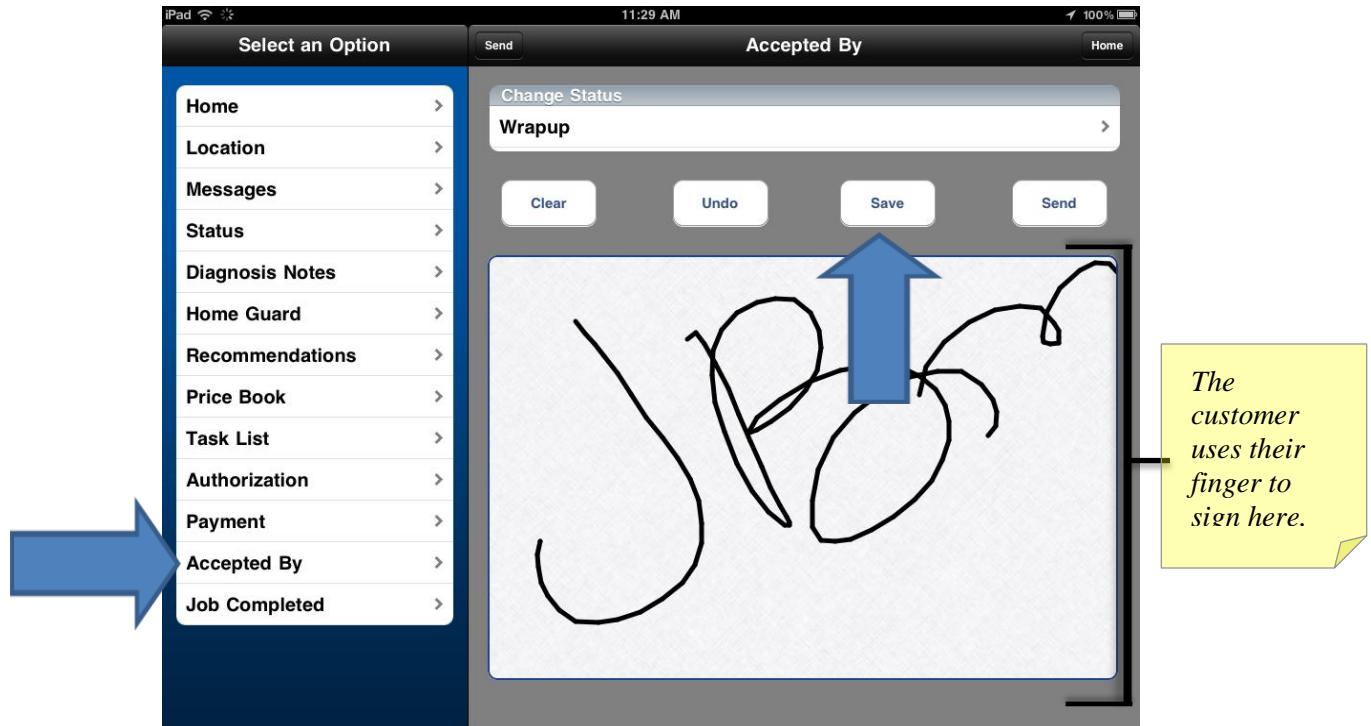
16.0 Accepted by

The **Accepted By** screen allows the customer to sign off on job completion. This screen also offers options to provide and invoice or estimate to the customer via standard mail, email or mobile printing (optional).



16.1 Completing the Job

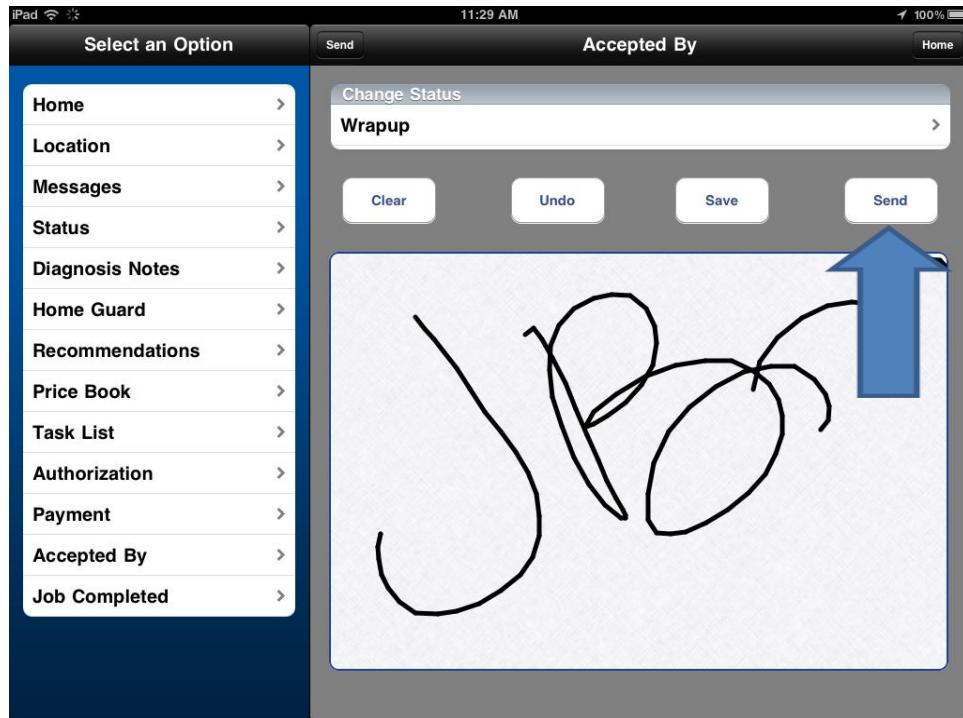
To complete a job, select the **Accepted By** Tab and ask the customer to sign their name in the signature field. Select **Save** to capture the signature.



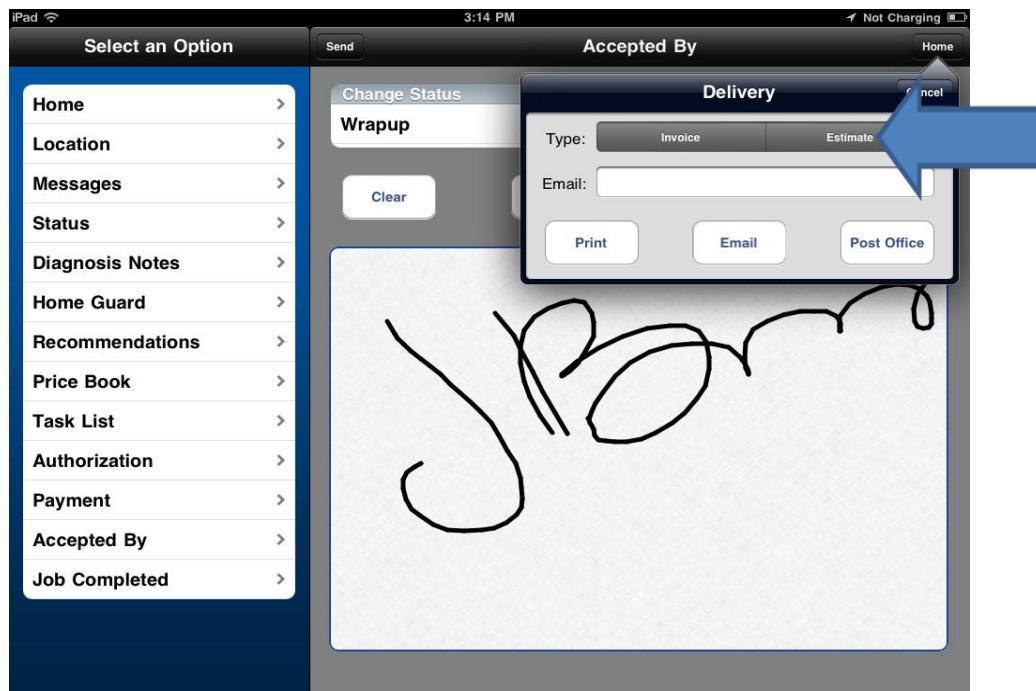
After selecting **Save**, you will be notified that the status of the job will be placed in **Wrapup**. Select **OK** to continue. **Wrapup Status** notifies the service center that the technician is nearly complete with the job.



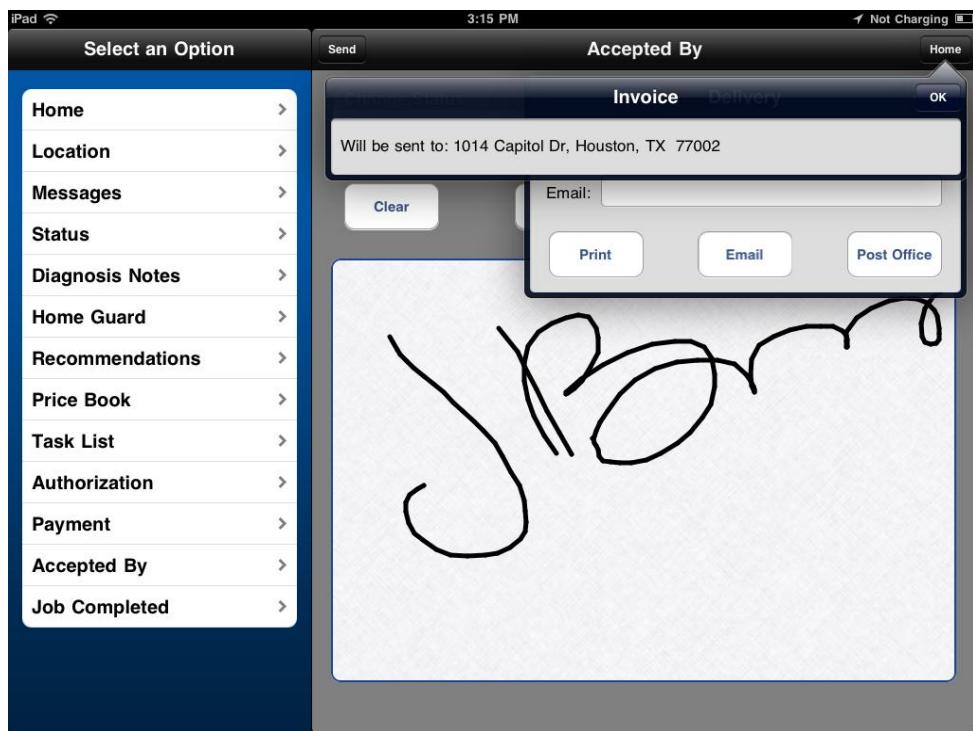
On the **Accepted By** Screen, you have the option to send an estimate or invoice to the customer. To send an invoice or estimate, select the **Send** Button.



After selecting **Send**, you will have three options for delivery of the invoice or estimate. First, select **Invoice or Estimate** from the **Type** field.

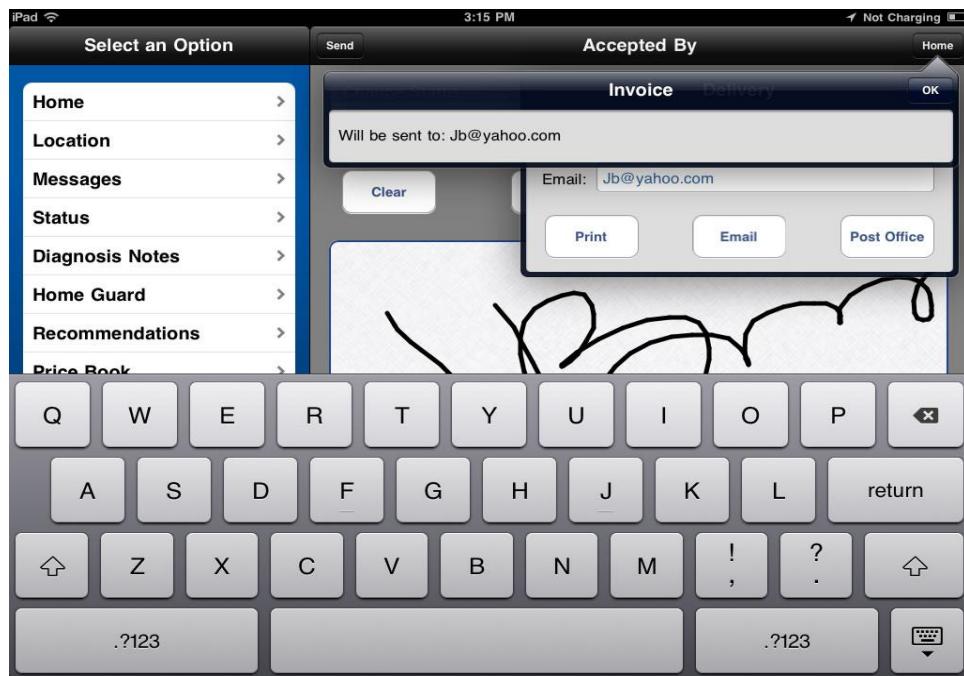


To mail a physical copy of the invoice or estimate, select **Post Office**. Confirm that the address is correct and select **OK**. This notifies the service center to mail the invoice or estimate to the customer's address.

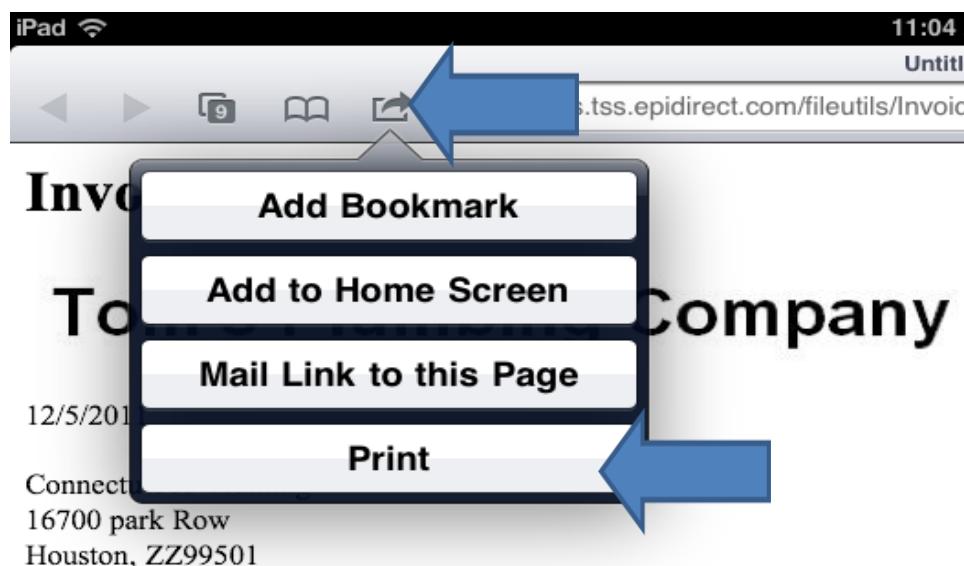


If the customer would prefer to receive the invoice or estimate by email, enter their email address by selecting the text field next to **Email**.

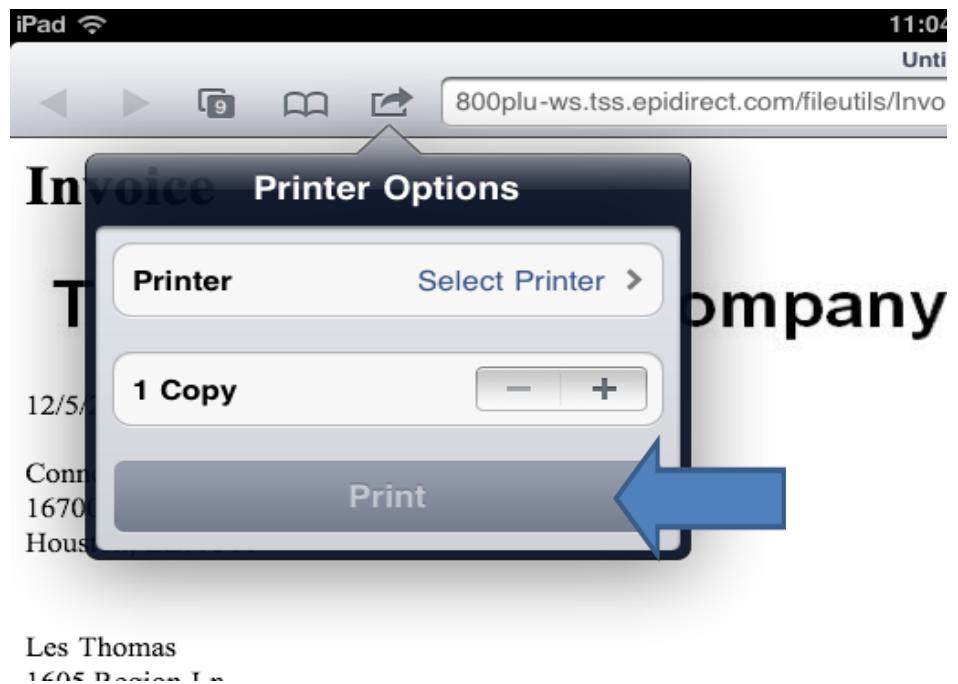
Once the email address has been entered, select the **Email** button. You will be asked to confirm the address by selecting **OK**, at which point the email will be sent.



To print a copy of the invoice or estimate, select the **Print** button. The document will be opened in the iPad's Safari Browser. Select the **Send Button** to open the delivery menu. Select **Print** from the delivery menu in Safari.



Select your printer from the available printers list by choosing **Select Printer** on the printer options screen.

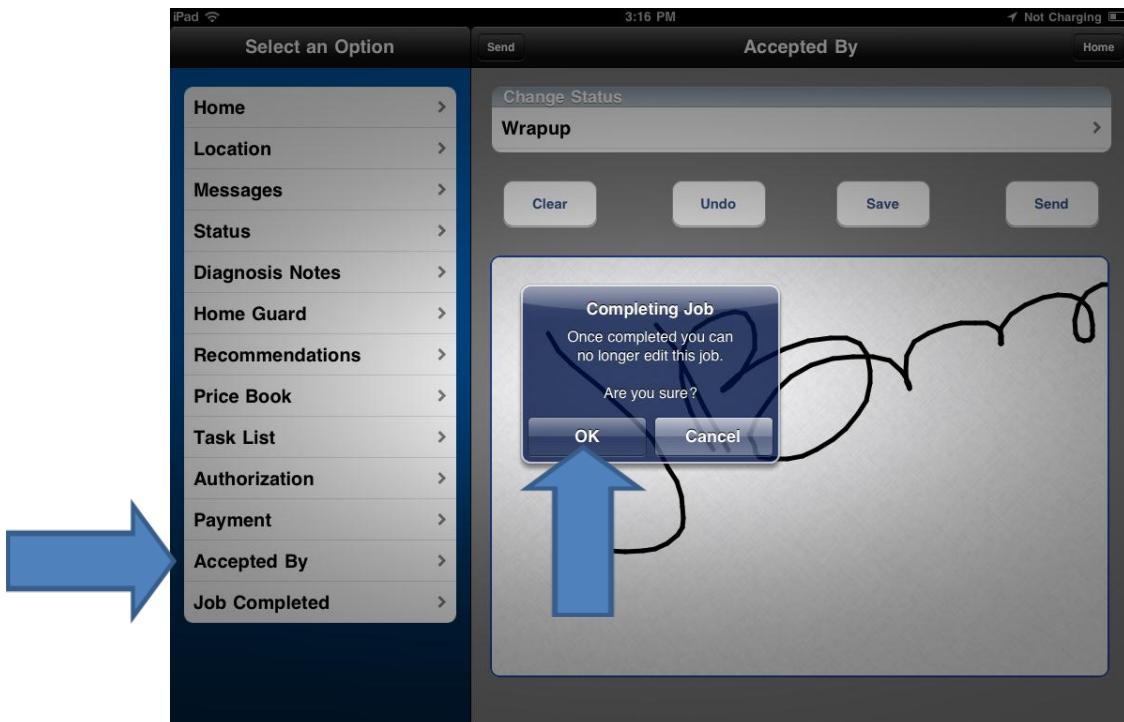


To print the document, select **Print**. The document will now print to your printer.

Completing the Job

17.0 Job Complete

When the work has been completed and all signatures have been captured, select the **Job Completed** Tab. You will be prompted to confirm that you are ready to complete the job. Select **OK** to complete the job.



Selecting OK will activate the Send/Receive Screen. The job will be sent back to the office and will no longer be available in the iPad.

You are now ready to select the next available job.

