

CONNECTUS Pro

t-Tab® Manual

CONNECTUS TECHNOLOGY

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## ConnectusPro iPad Application t-Tab® Manual

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# **t-Tab® Manual**

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Information



## How to use this manual

There are icons to better assist you in using this manual.

 Important Information

 Keyboard Usage

 Valuable Information

 Apple iPad Information

Look for these icons at the beginning of each chapter

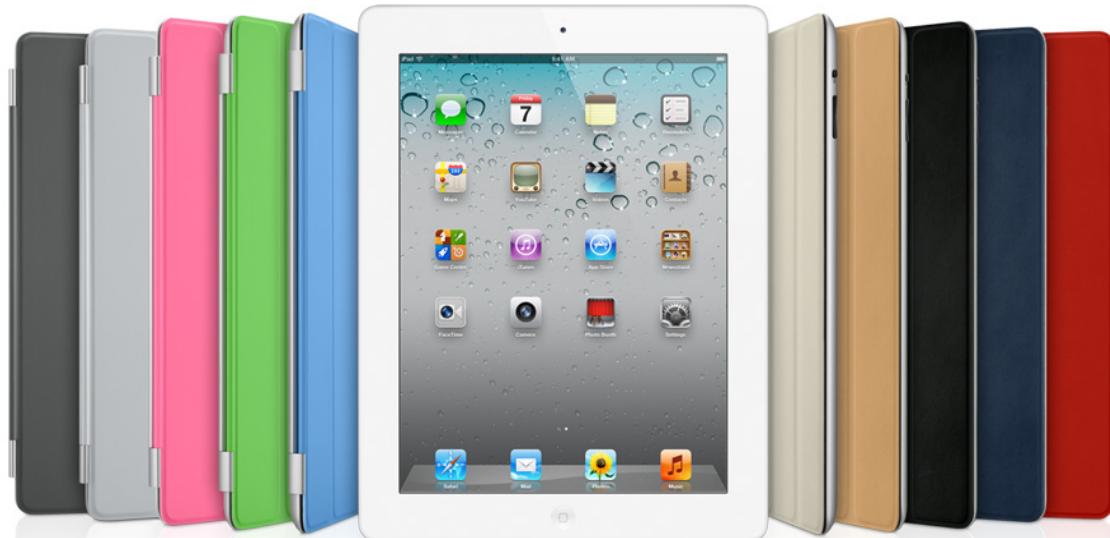
Chapter

# 1

## 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.



### In this Chapter:

Apple iPad Information

Keyboard Usage

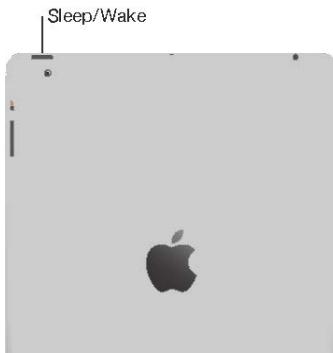


## 1.0 GENERAL INFORMATION

### 1.1. iPad Overview



## 1.2 Power Control



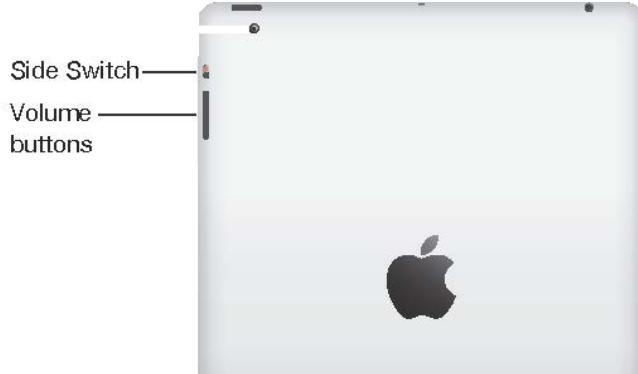
**Turn iPad off**

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**

Slide the Side Switch down to mute notifications

## effects

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. For maps, double-touch to zoom in and 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

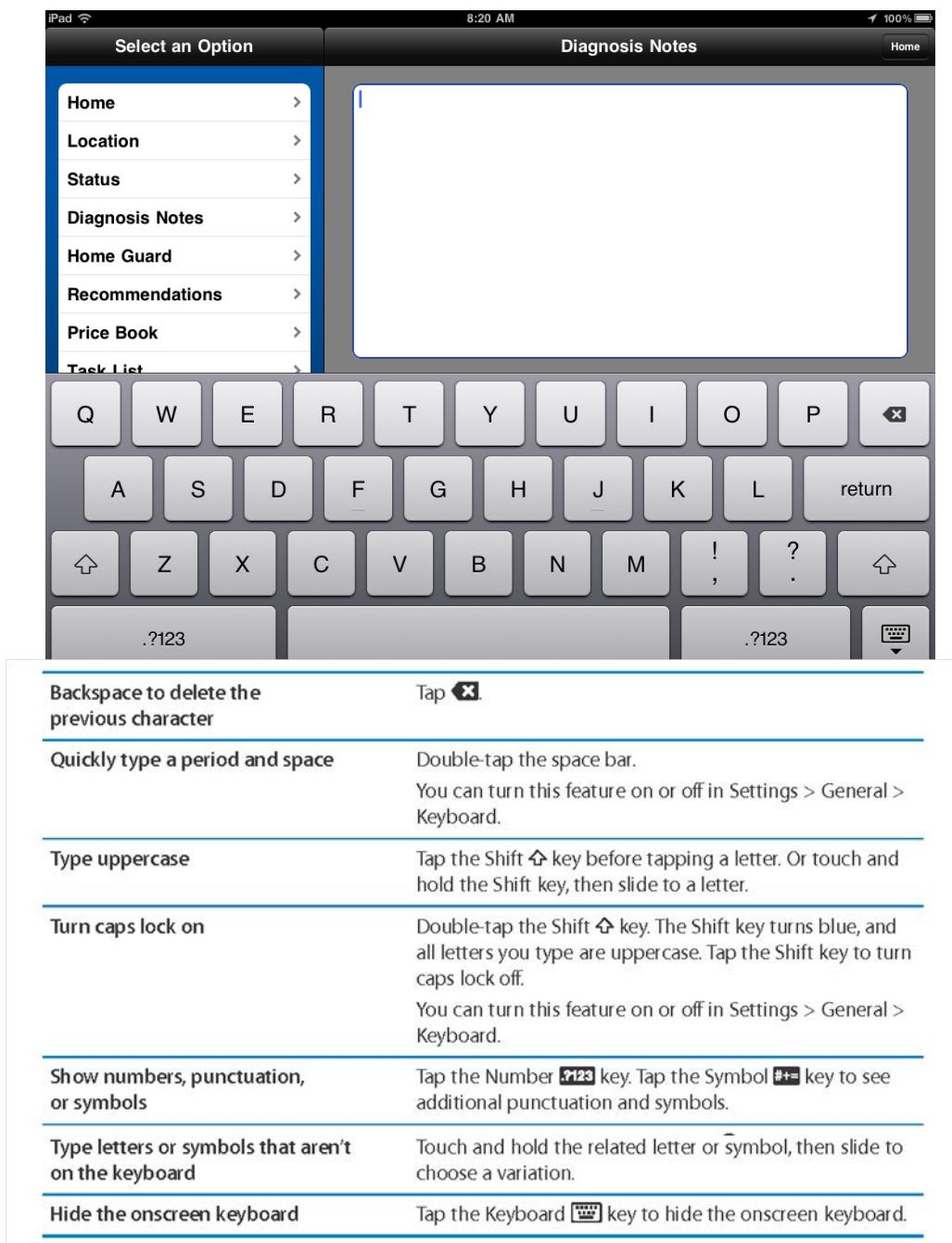
## 1.6.1 Typing

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.



# Chapter 2

## Connecting to a Wireless Network



In this Chapter:  
 Apple iPad Information

## 2.0 Connecting to a wireless Network

Here are the steps needed to get your iPad in the network.

Click on the Settings App on the homepage of your iPad



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



Select the name of the network you wish to connect to.

**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 for it now. Enter the network password



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

Chapter  
**3**

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



In this Chapter:

 Apple iPad Information

 Important Information

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

### 3.1 Touch the Settings Icon

Touch the Settings icon on your iPad Homepage

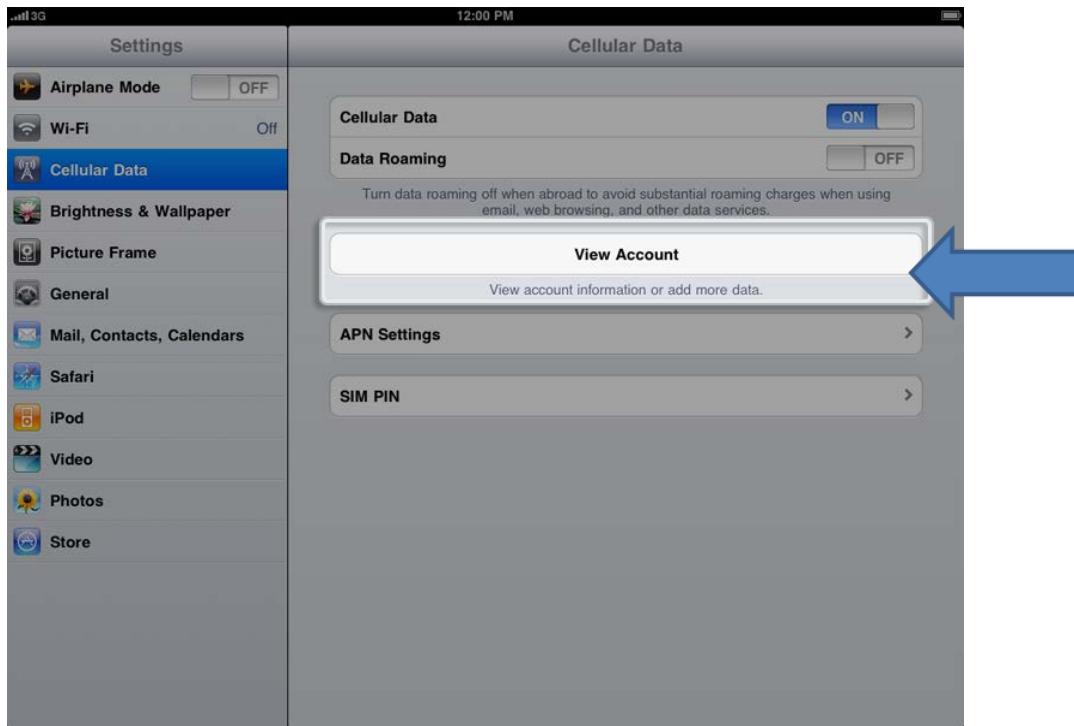


### 3.2 Cellular Data Page

Touch the Cellular Data Tab



Then touch the View Account Button.



### 3.3 User Information

Enter your first and last name and your phone number.



### 3.4 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.



### 3.5 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.



### 3.6 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		

Service address is same as billing address

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 tap "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:

Service address is same as billing address

Use a different service address

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

service address	Address 1 (no PO boxes)		
Address 2			
City	State	Zip Code	

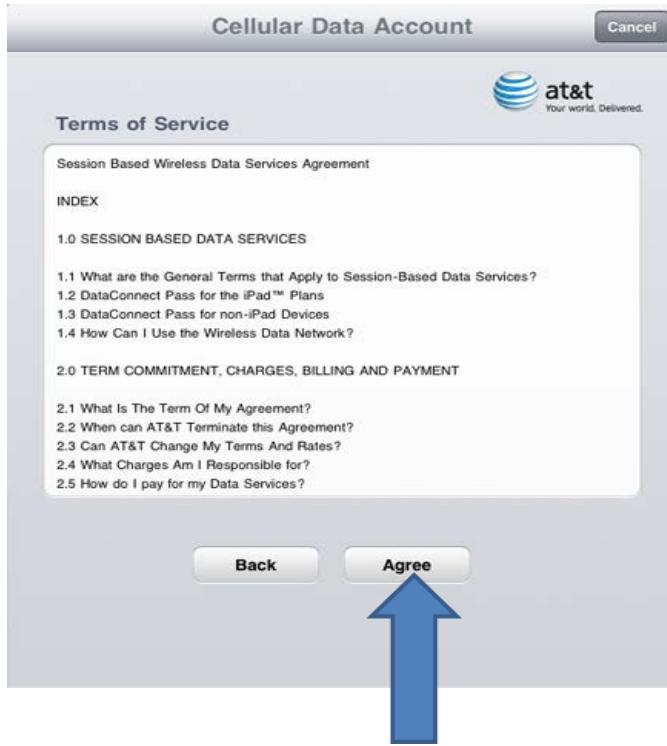
Next



**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.

## 3.7 Cellular Data Account

The Terms of Service agreement loads. Take a minute to read this agreement. Tap Agree to continue.



The Payment Summary loads. This shows you a summary of the account and plan you have selected:



Tap Submit to complete the creation of your Cellular Data account. The Congratulations screen loads. This lets you know that your account has been created, and that AT&T is activating your iPad. Tap OK to finish and return to the Settings screen of your iPad Wi-Fi + 3G.



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



#### Additional Information

**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.

If you need to change or correct your email account information, please contact AT&T.

**Note:** A unique email address is required for your AT&T account. If you plan on setting up cellular data accounts for multiple iPads, you must use a different email address for each account.

## Getting Started

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



In this Chapter:

 Apple iPad Information

## 4.0 GETTING STARTED

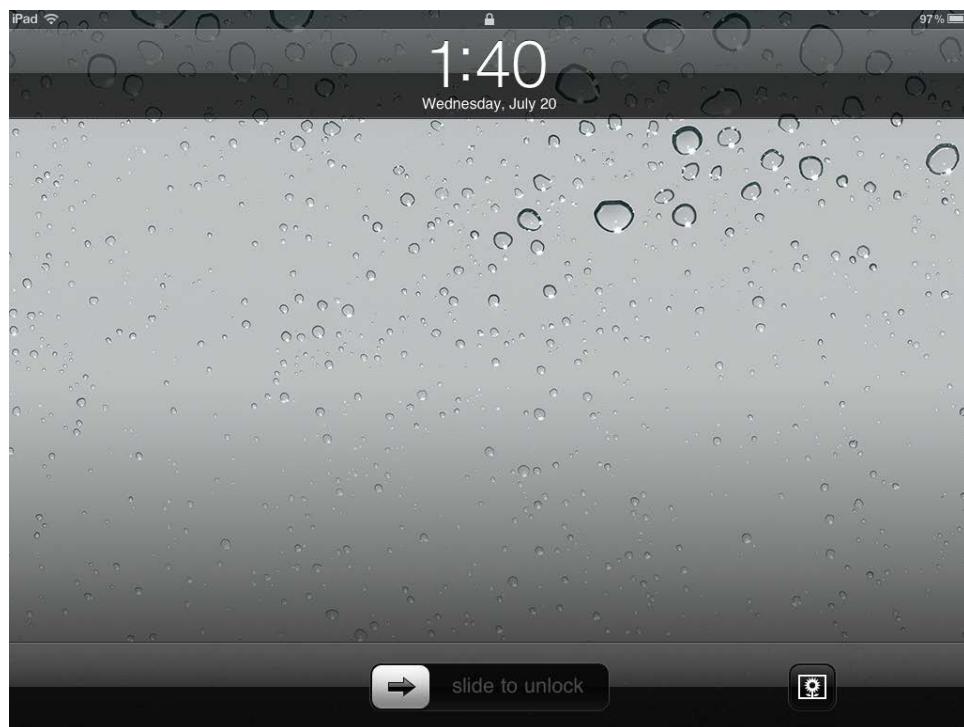
### 4.1 Turn on the iPad

Press and hold the Sleep/Wake Button



### 4.2 Slide to Unlock

Slide your finger to the right to unlock the iPad



## 4.3 iPad Home Screen

Touch the ConnectusPro App/icon to get to the ConnectusPro home screen



## Home Screen

This is the ConnectusPro Home Screen, where you will begin your job.

This screen offers general information about your iPad and the job you are about to start working on.



In this Chapter:

Valuable Information

Keyboard Usage

## 5.0 HOME SCREEN

This is the home screen for ConnectusPro. This is where you should begin.

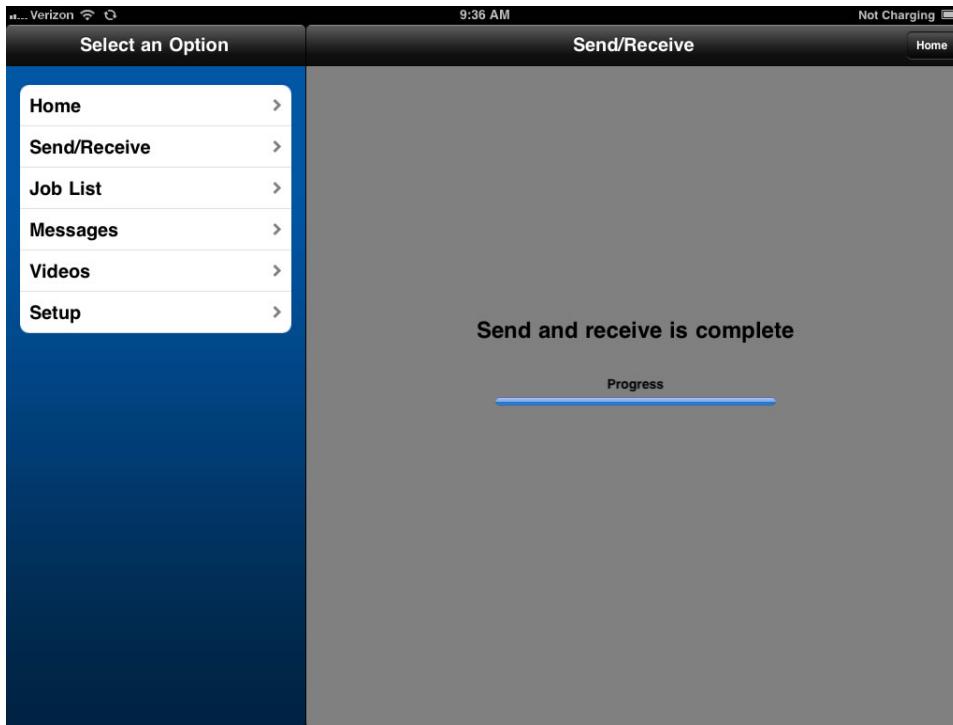


### 5.1 Send/Receive Tab 📁

In order to receive a job you must touch the Send/Receive Tab.

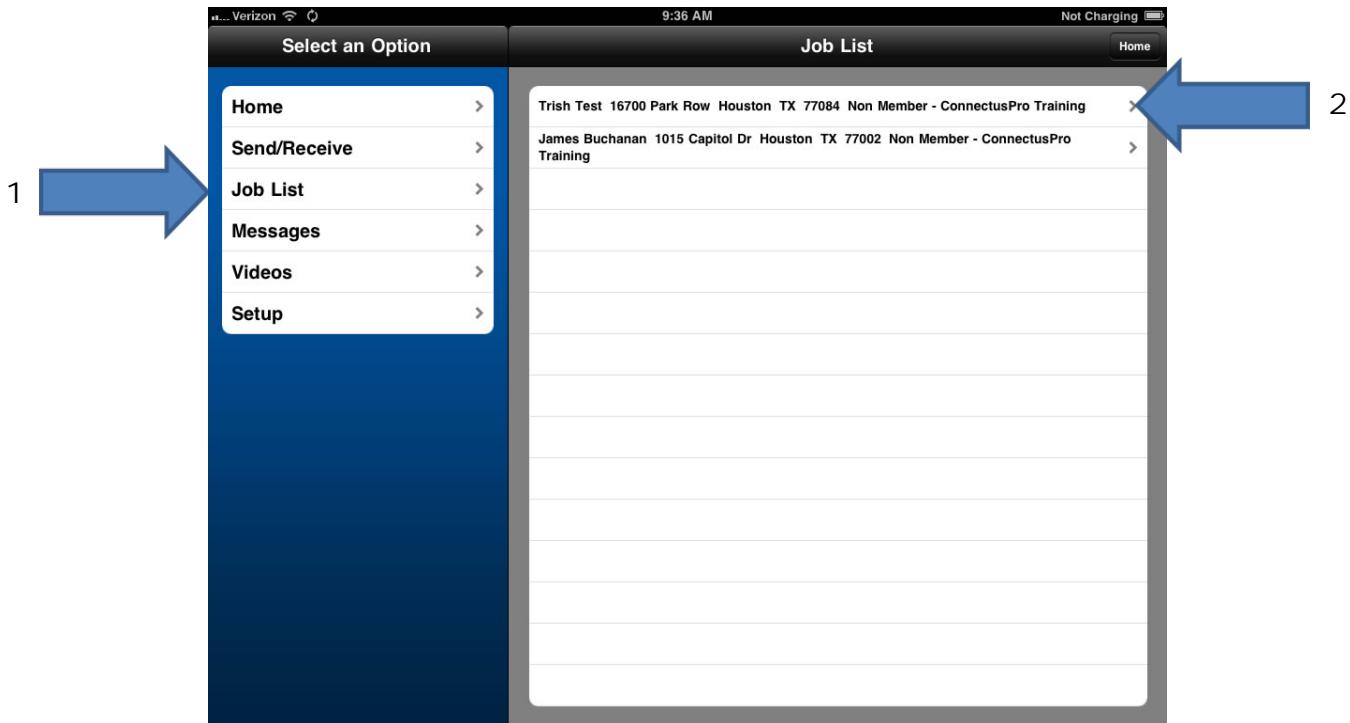


This process sends your job to your iPad. It takes a few minutes to send and receive



## 5.2 Job List Tab

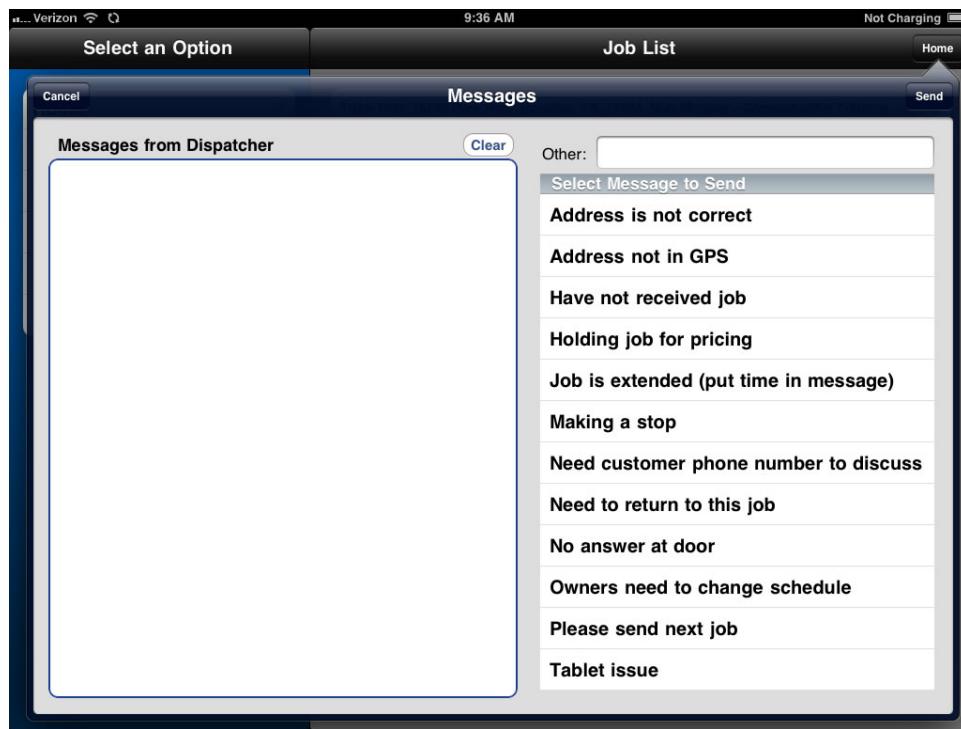
Touch on Job List Tab to see the list of jobs in your iPad (1). When the Job List Screen comes up touch on the job you are going to be working on (2).



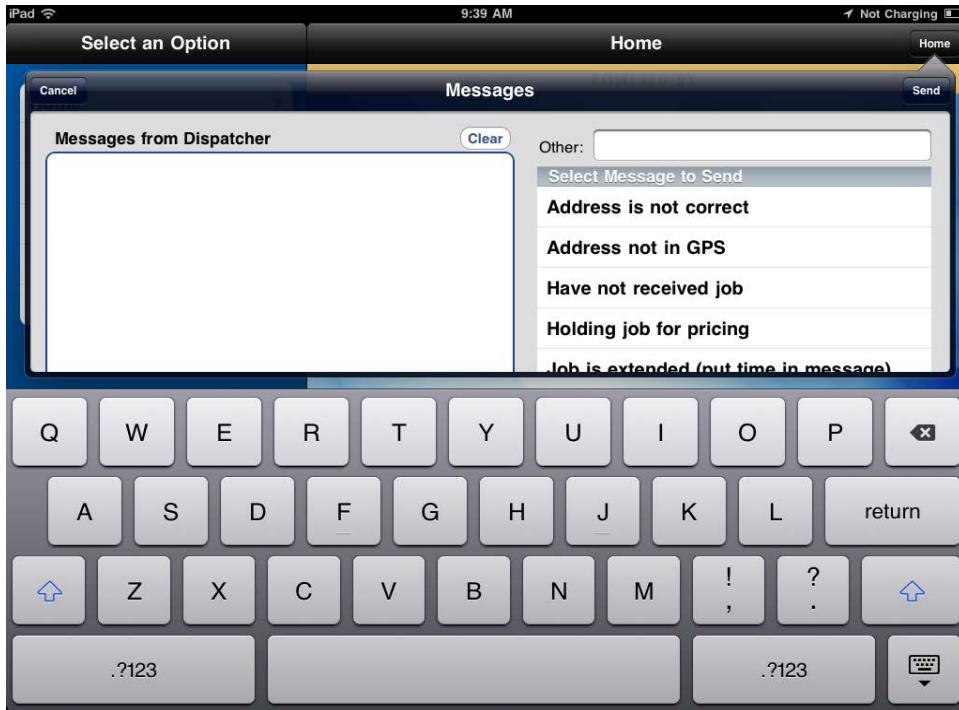
## 5.3 Message Tab



There will be a dropdown menu that offers several different options. This menu offers a few examples of what you may see, in the drop down menu (Please Note: this is just a sample of the topics available). Choose the message that best describes your issue, touch it and then touch send. This will send the message to Service Center and then the issue can be dealt with accordingly.



If you are having an issue that is not available in the dropdown menu, you can type in your specific message to send to the Service Center. Touch the white space in the box next to Other. The keyboard will come up. Type in the issue and then touch send. This will send the message to Service Center and then the issue can be dealt with accordingly.

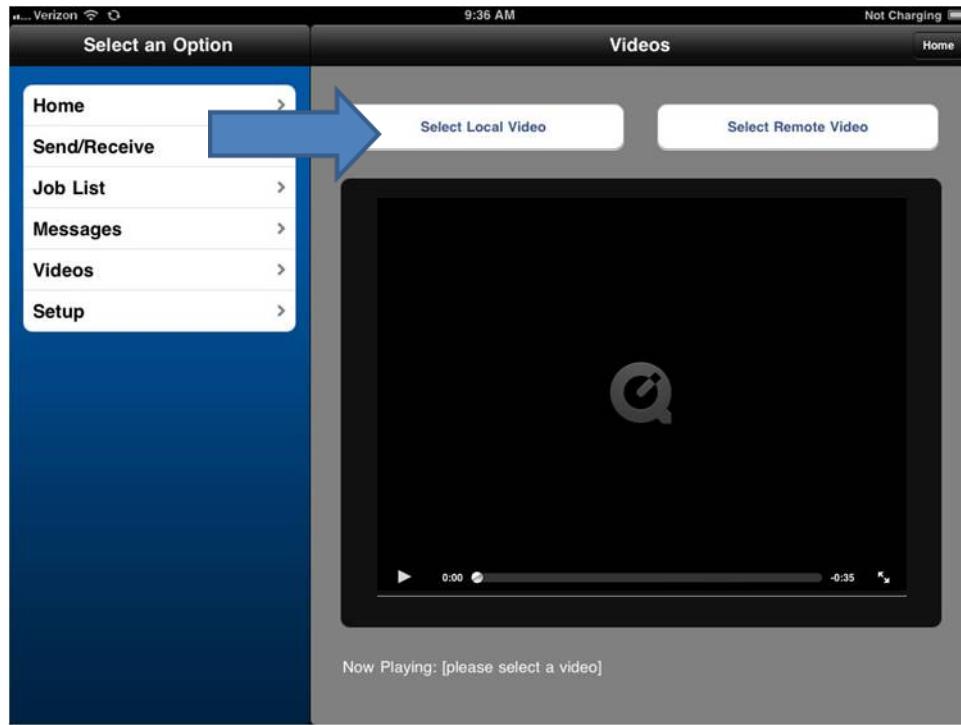


## 5.4 Video Tab

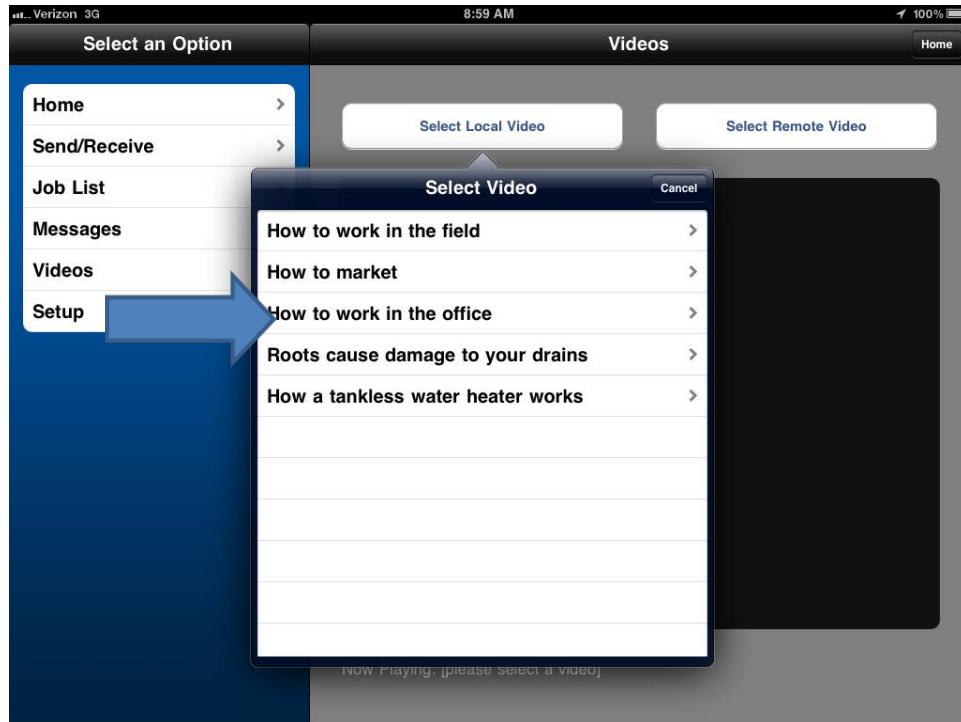
This Tab features videos for use when talking to customers. These videos help to show your customers what work is being done. To show a video touch the Videos Tab.



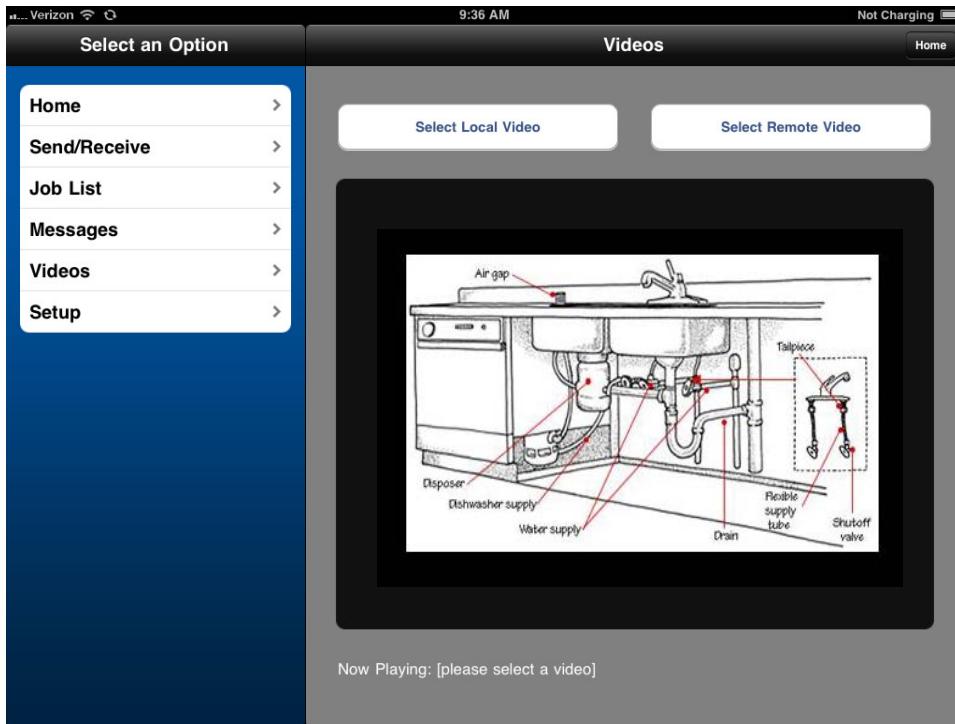
When the video page opens it will look like this. Touch the Select Local Video Tab to browse videos.



There is a dropdown menu, where you can select a specific video to show the customer.



These videos can be used to educate your customers about the work that's going to be done or as a sales tool.

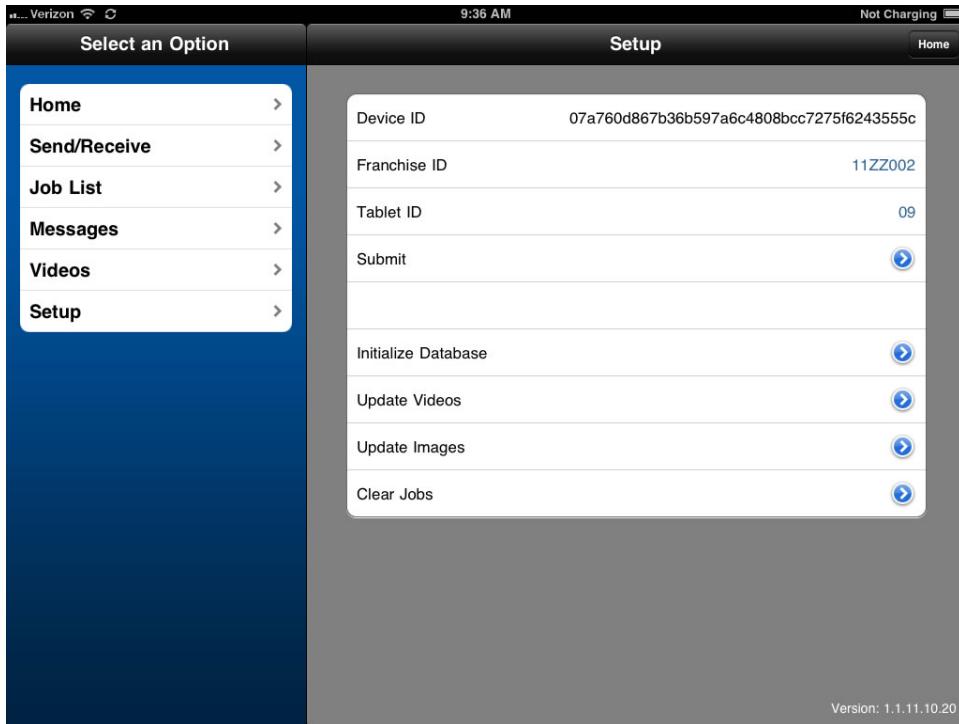


## 5.5 Setup Tab

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

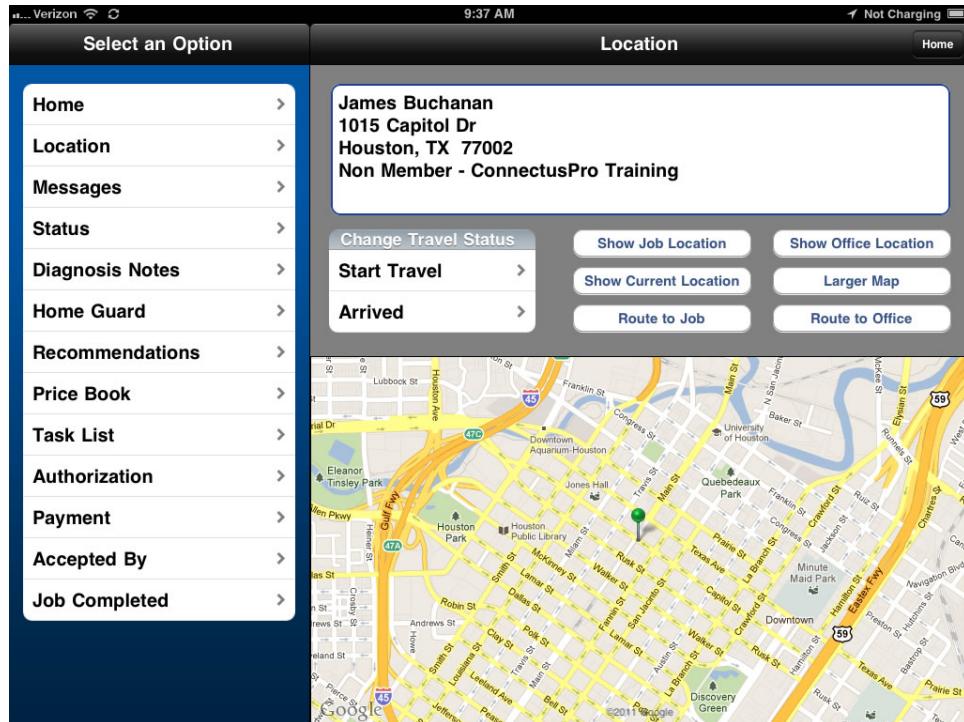


The Setup screen has basic information about your iPad. You can use this screen to update videos and images, as well as determine which version of the application you are currently running



## Location Screen

The Location Screen has the address of the job and assistance with directions.



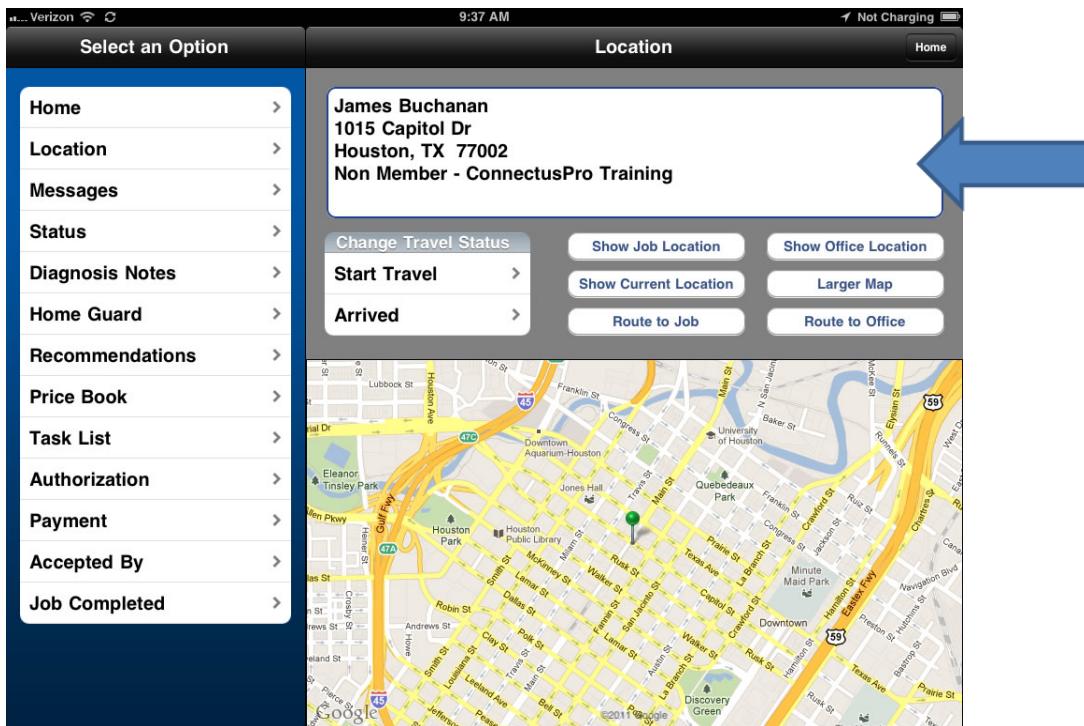
In this Chapter:

📁 Valuable Information

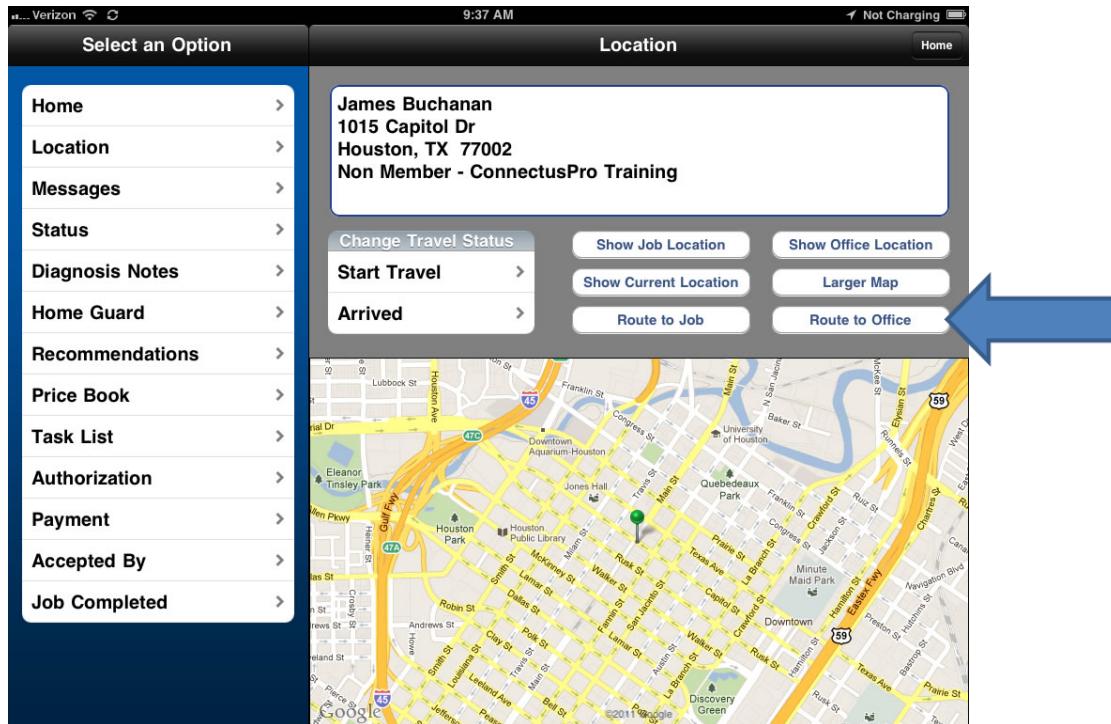
## 6.0 LOCATION SCREEN



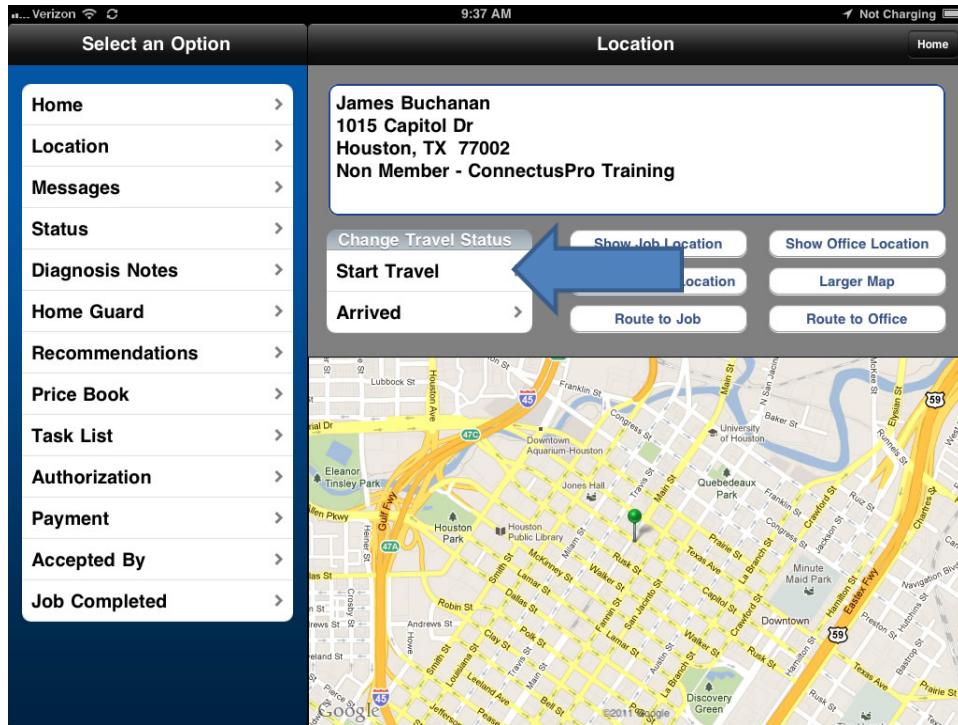
This is the Location Screen. This screen offers the location and direction to your current job.



This screen also offers options for directions to the job. By touching any of the Buttons you can get detailed directions both to and from the job, or to the office.

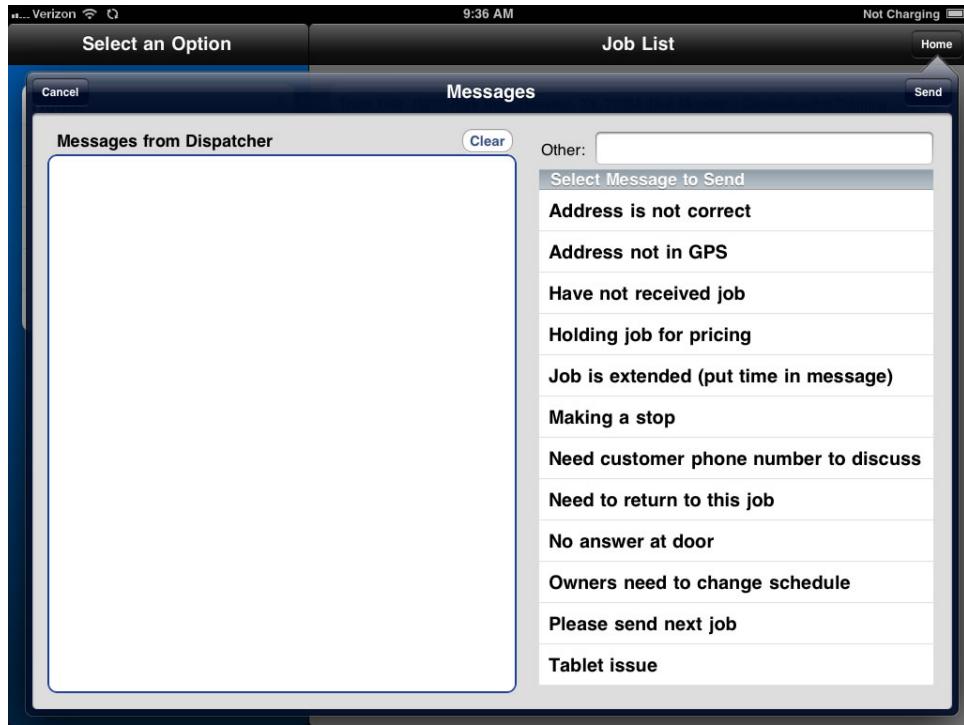


Once you have determined your route and touch the Start Travel Button. This informs the Service Center that you are starting to the drive to the job.



## Message Screen

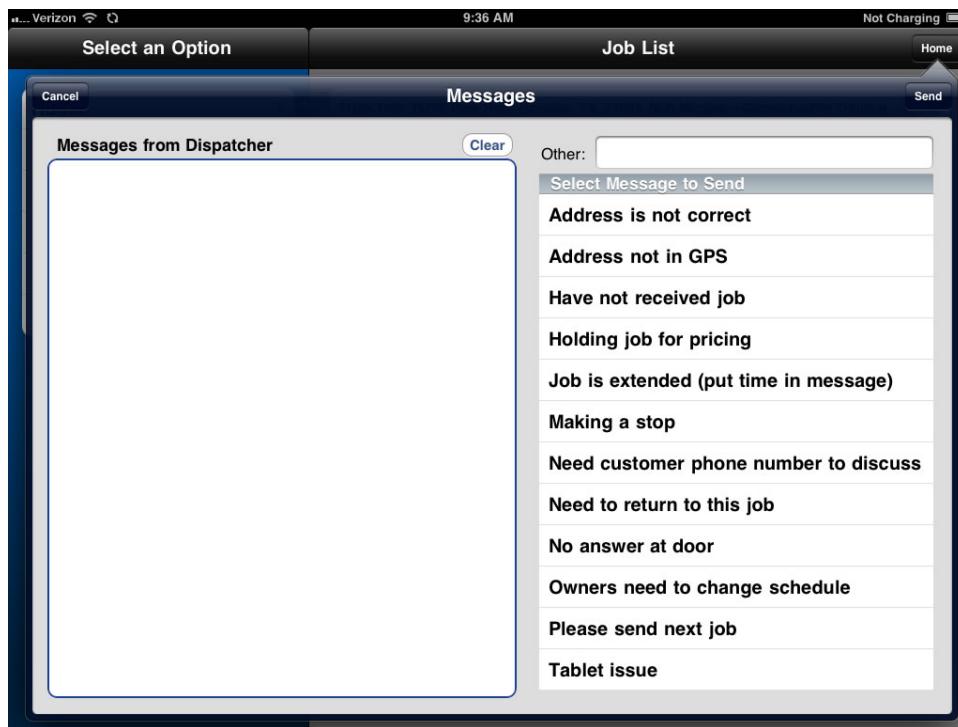
The Message screen offers the opportunity to contact the Service Center without tying up phone lines



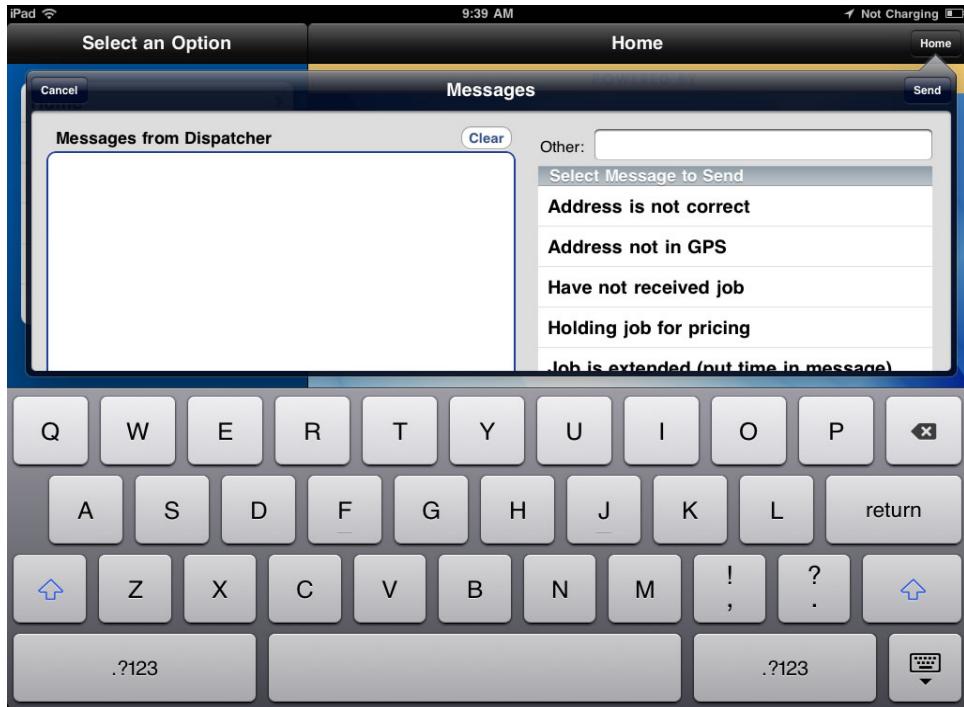
## 7.0 MESSAGE SCREEN



There will be a dropdown menu that offers several different message options. This menu offers a few examples of what you may see, in the drop down menu. Select the message that best describes your issue, touch it and then touch send. This will send the message to Service Center so that the issue can be dealt with accordingly.

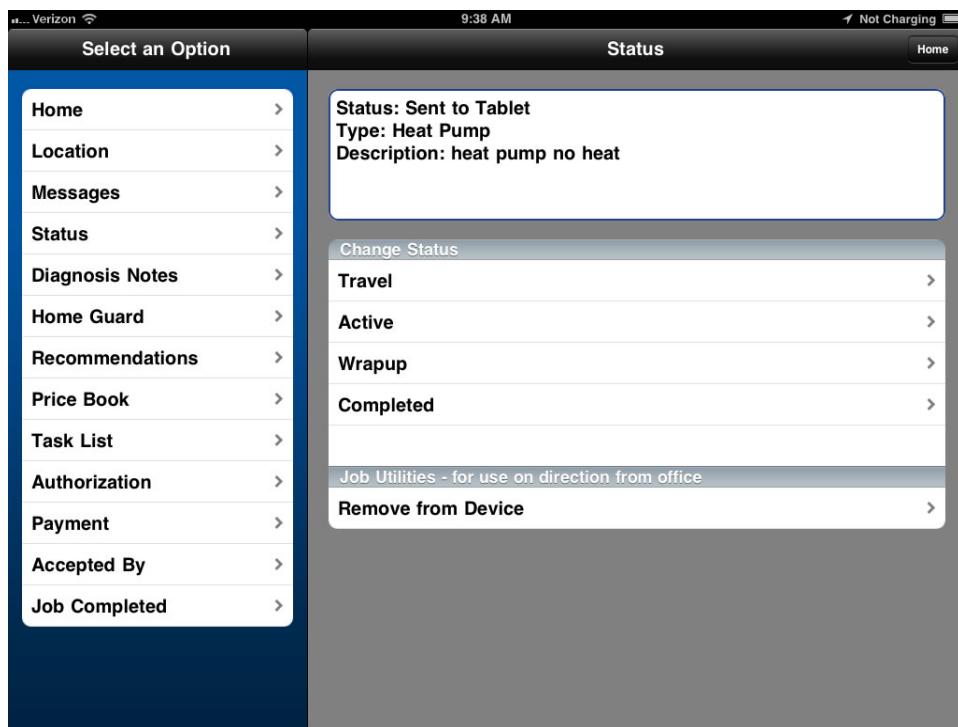


If you are having an issue that is not available in the dropdown menu, you can type in message to send to the Service Center. Touch the white space in the box next to Other to bring up the keyboard. Type in your issue and then touch Send. This will send the message to Service Center and then the issue can be dealt with accordingly.



## Status Screen

The Status Screen has several purposes. The Status Screen relays information to the Service Center to inform them where you are and what stage of the job you are in.



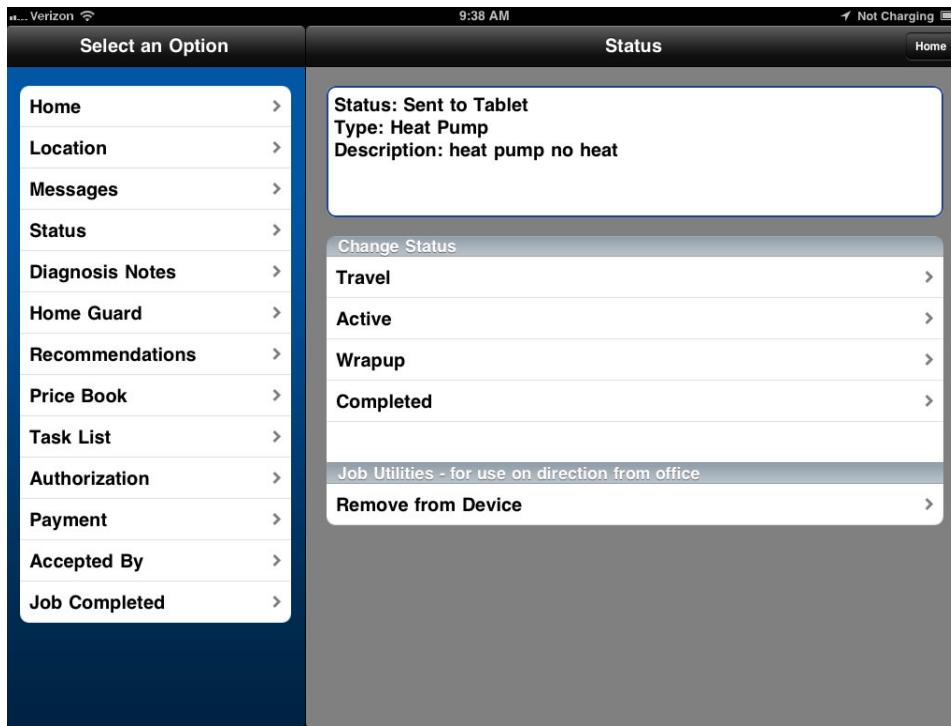
In this Chapter:

Valuable Information

Important Information

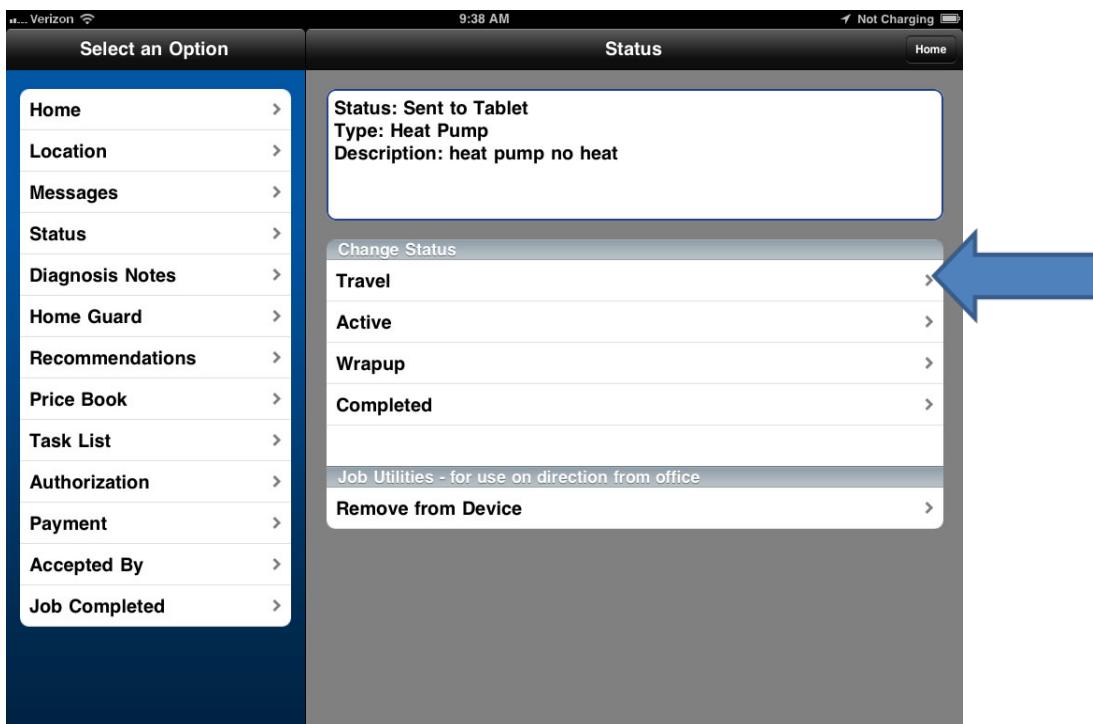
## 8.0 STATUS SCREEN

Once vehicle, touch the Status Tab. Keeping your status current assists the Service Center informed of your progress on the job.

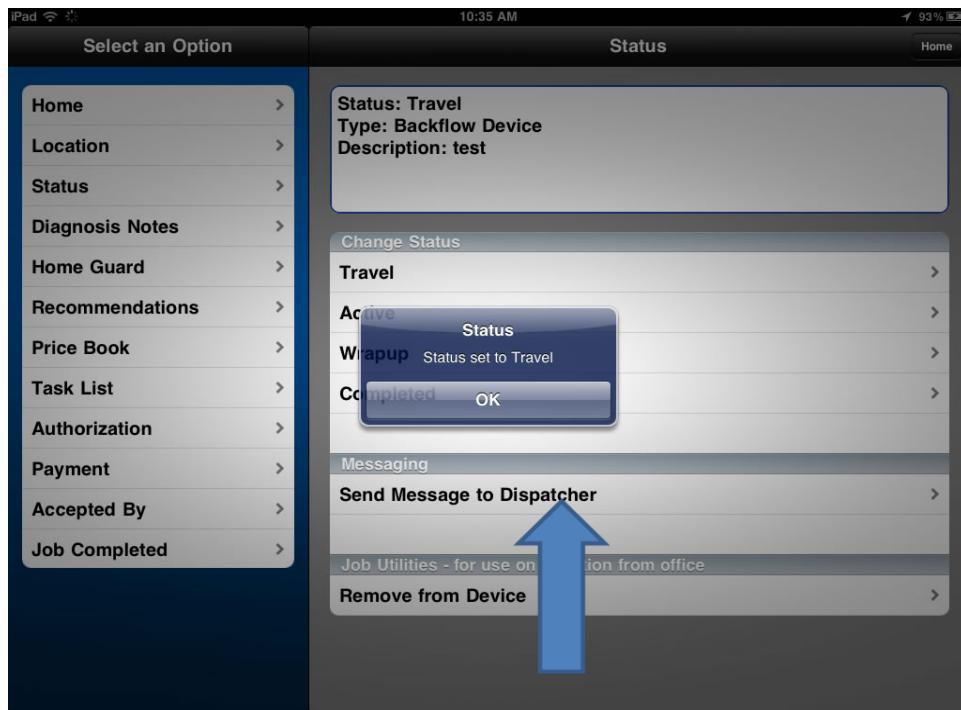


### 8.1 Travel Button

Touch the Travel Button to change your status to Travel. This notifies the Service Center that you are traveling to the job

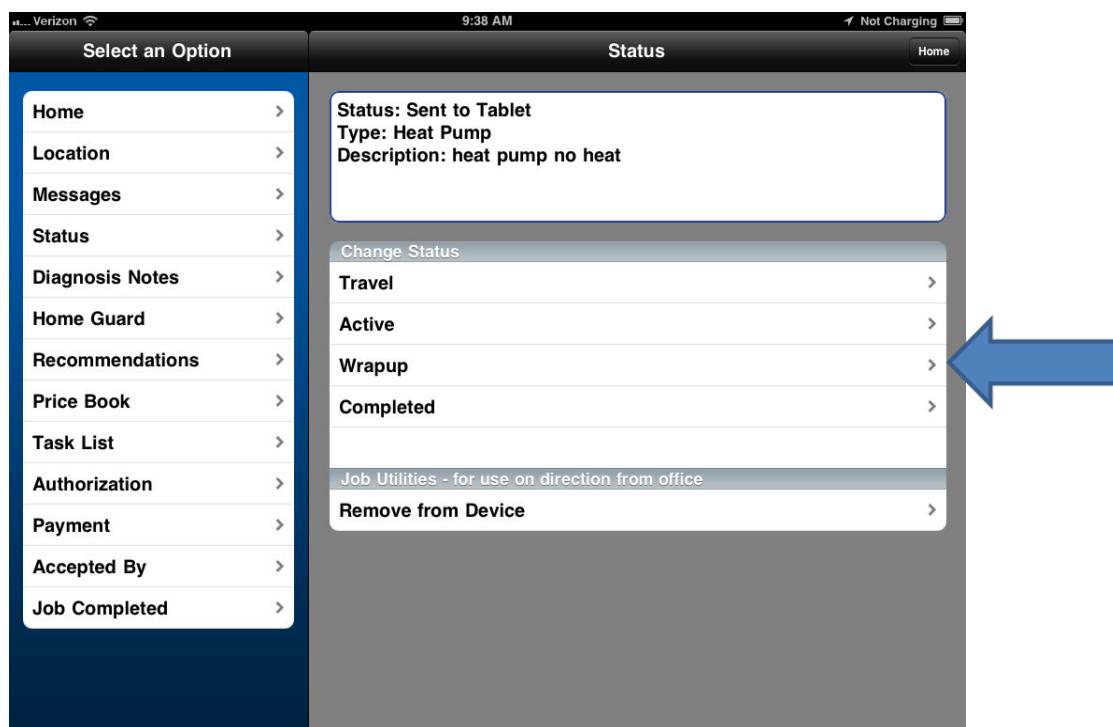


After you touch the Travel Button, you will tell you that your status has changed to Travel. Touch the OK Button, to return to the Status Screen and proceed to with the job

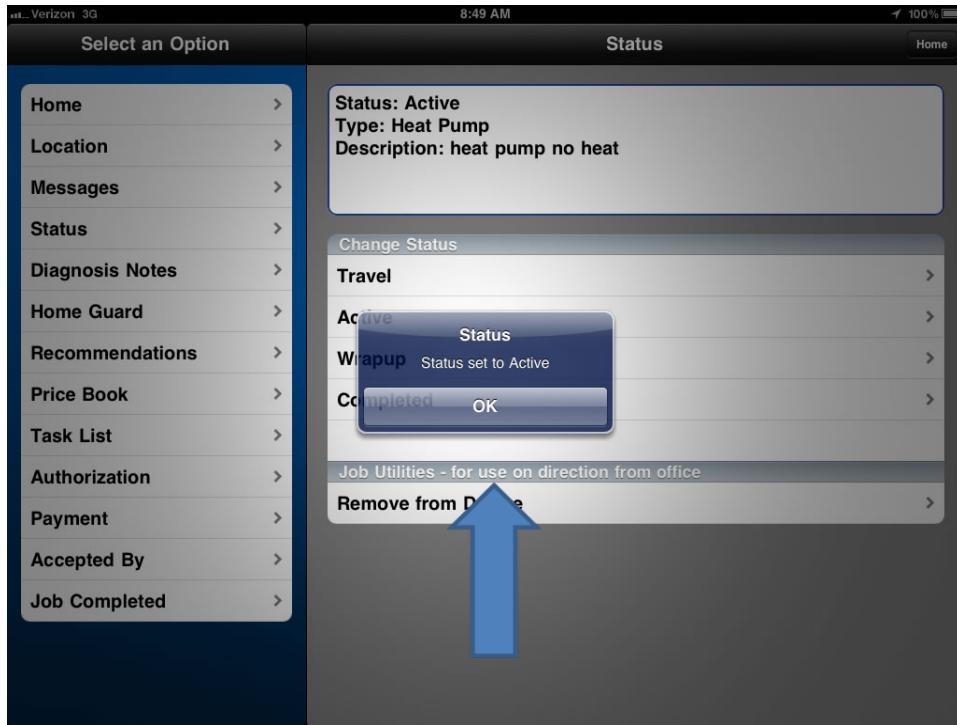


## 8.2 Active Button

Touch the Active Button once you arrived at the job to change your status to Active. This lets the Service Center know that you are at the job.

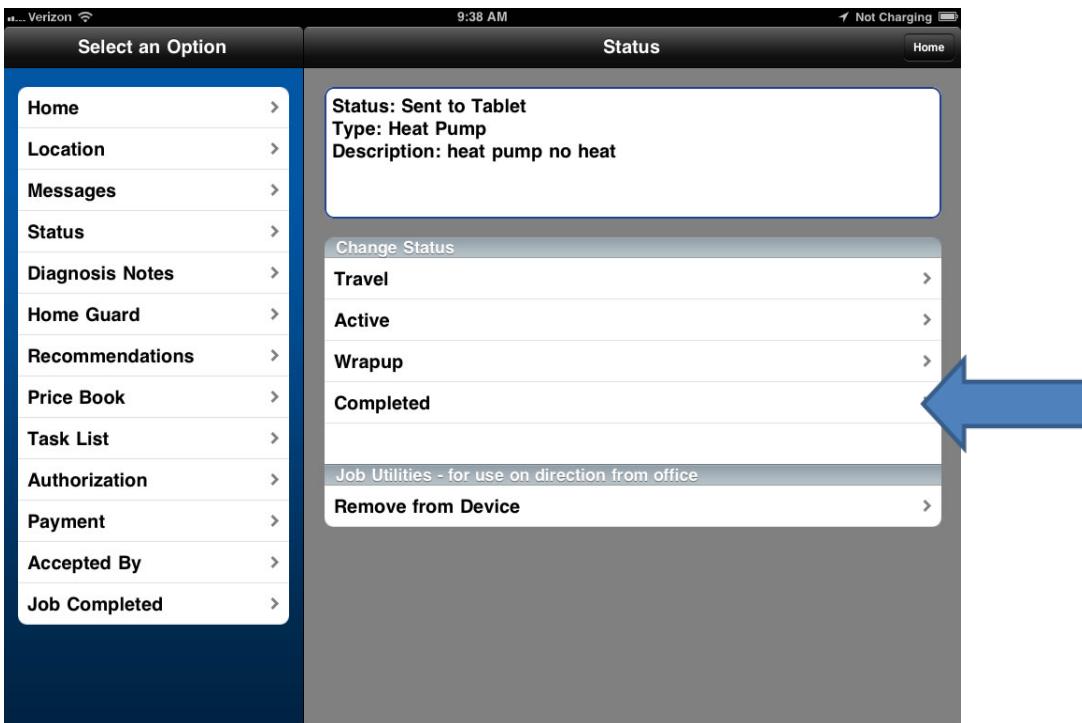


After you touch the Active Button touch OK to change your status to Active. The status screen will re-appear. To proceed with the job touch the Diagnosis Notes Tab.

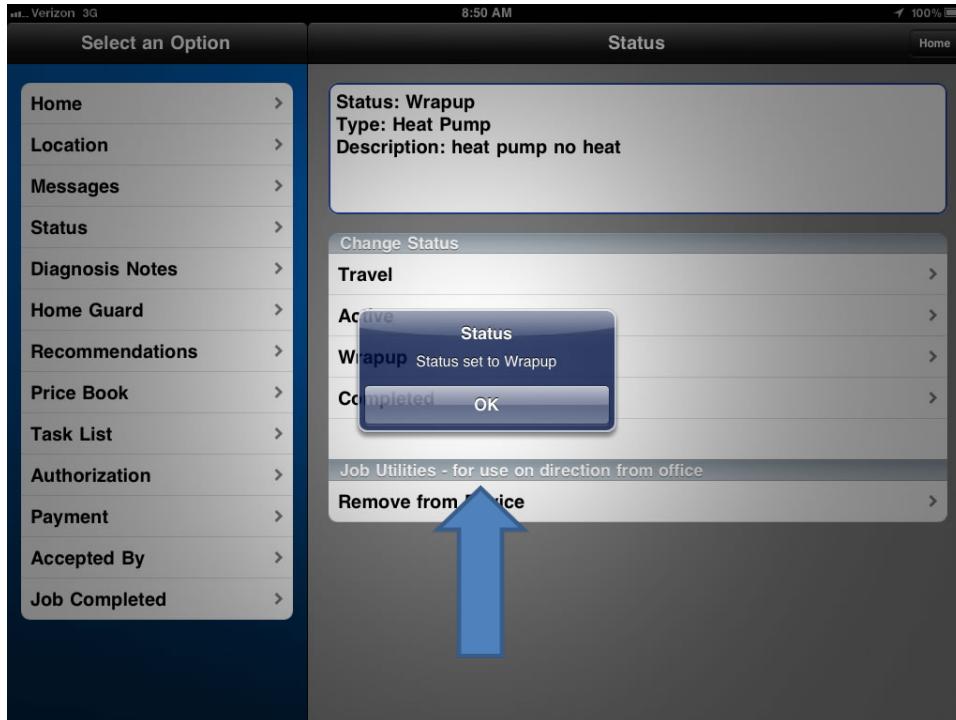


### 8.3 Wrapup Button

Touch the Wrapup Button to change your status to Wrapup. This lets the Service Center know t you are in Wrapup mode.

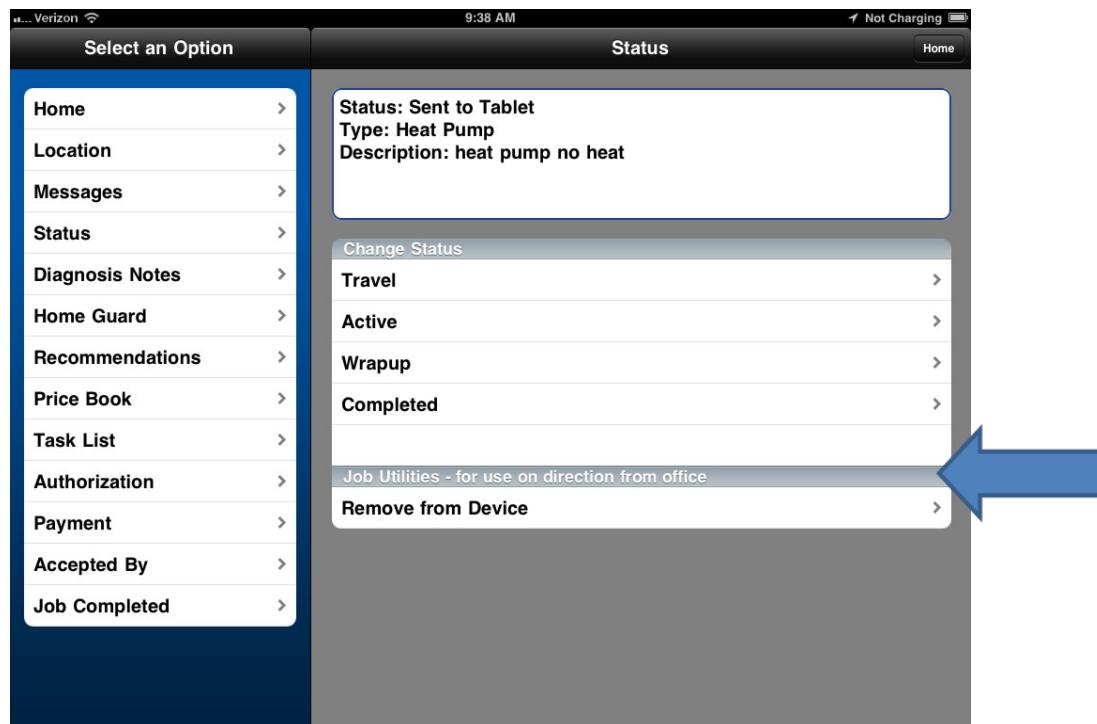


After you touch the Wrapup Button, touch ok to change your status to Wrapup.

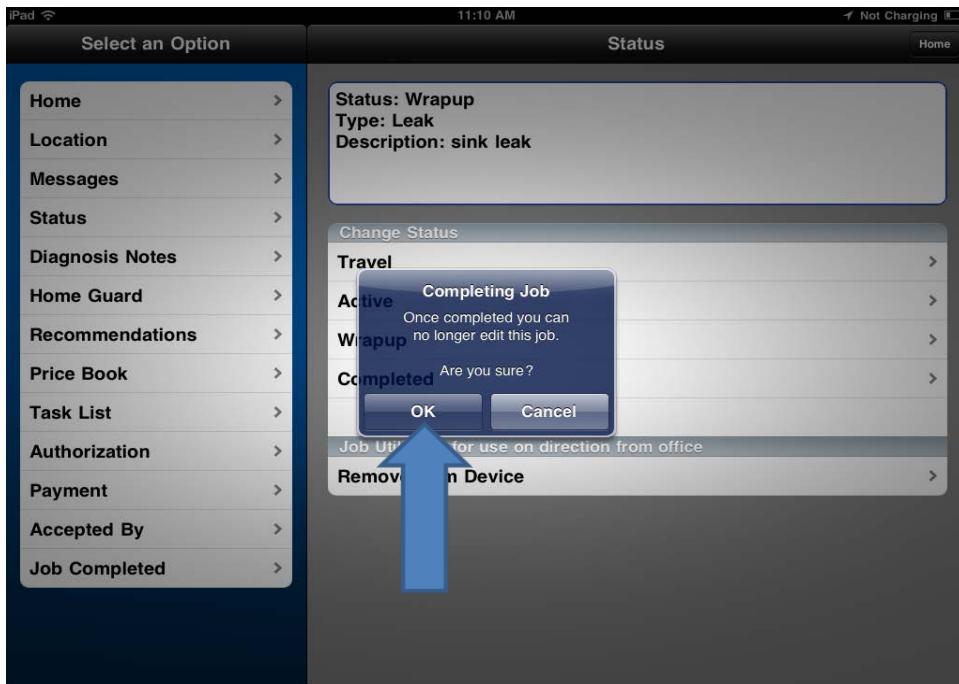


## 8.4 Completed Button

Touch the Completed Button to finish the job. This lets the service Center know that you are completing a job.



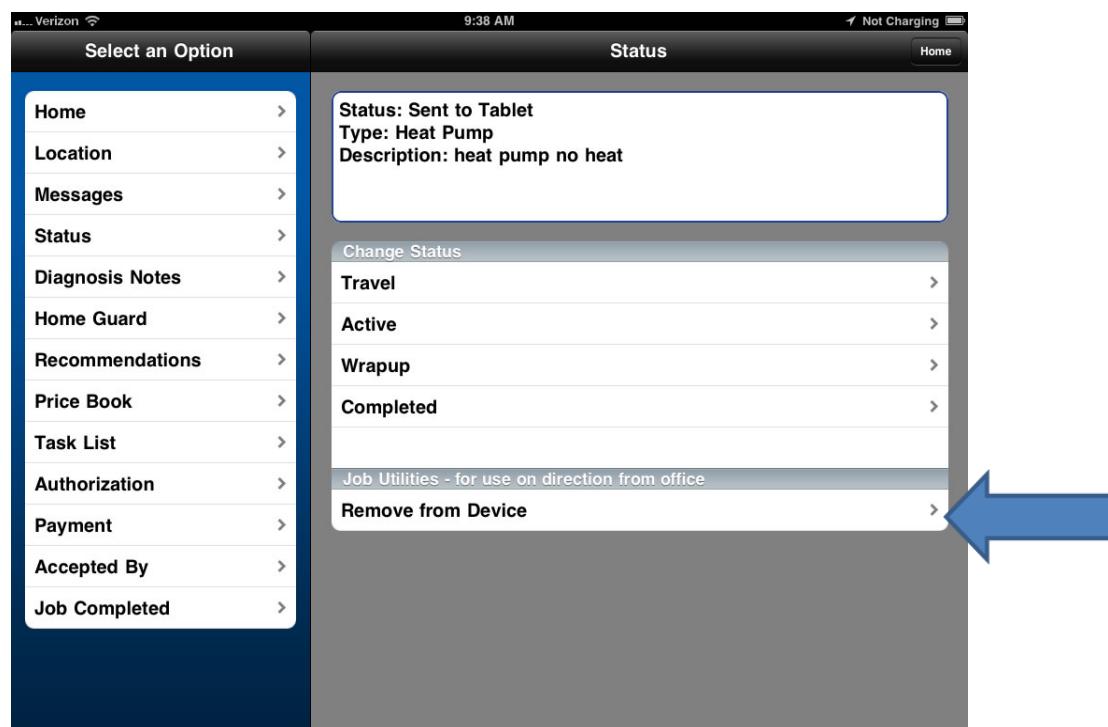
When the job has been completed and all signatures have been captured touch on the Job Completed Tab and then touch OK

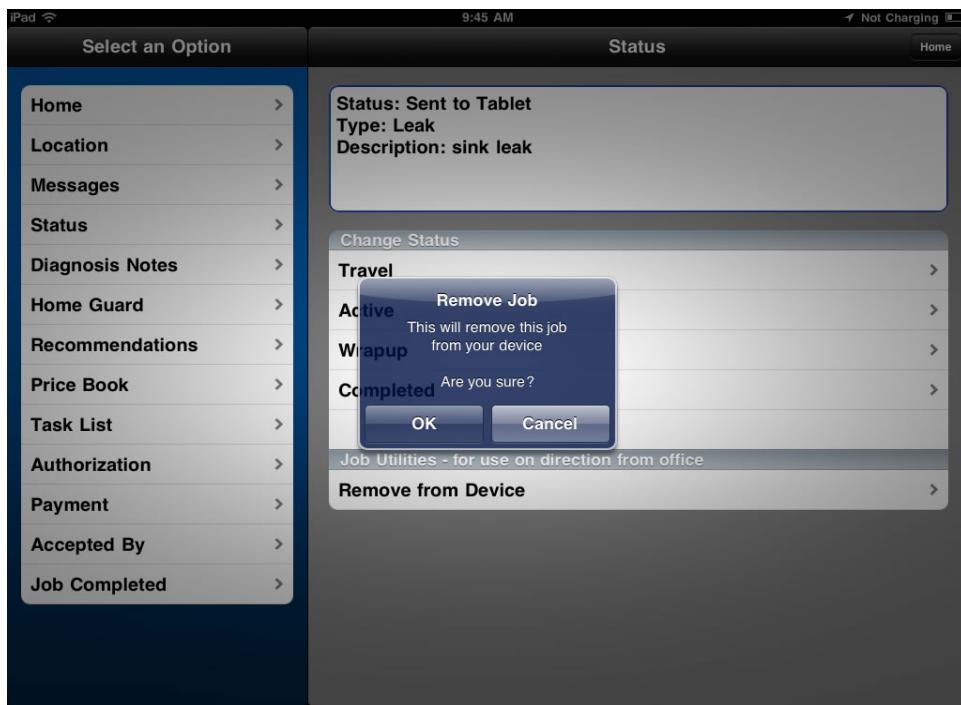


**PLEASE NOTE:** If you touch the OK Button the job will go back to the Service Center and it will no longer be in the iPad

## 8.5 Remove from Device

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

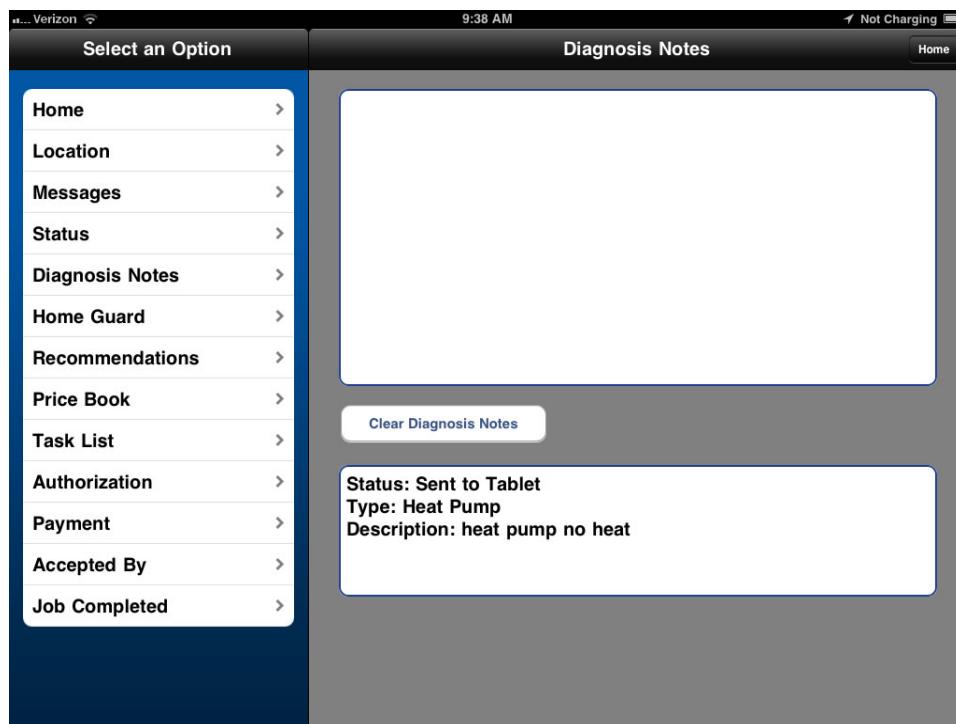




 **PLEASE NOTE:** If you touch the OK Button the job will go back to the Service Center and it will no longer be in the iPad

## Diagnosis Notes

The Diagnosis Notes gives information on the job you are about to start.



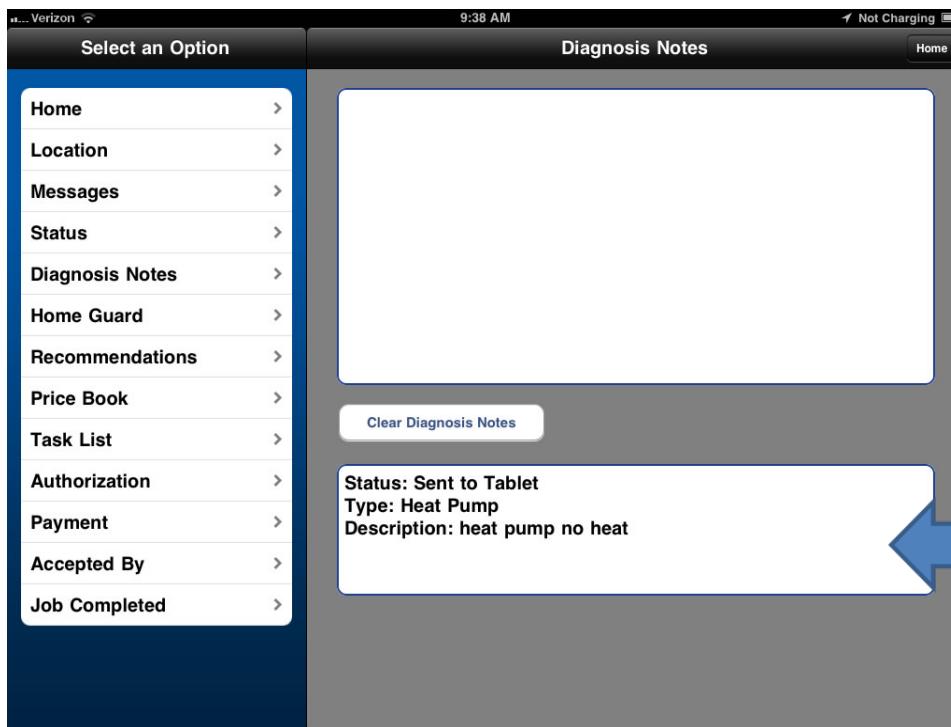
In this Chapter:



Keyboard Usage

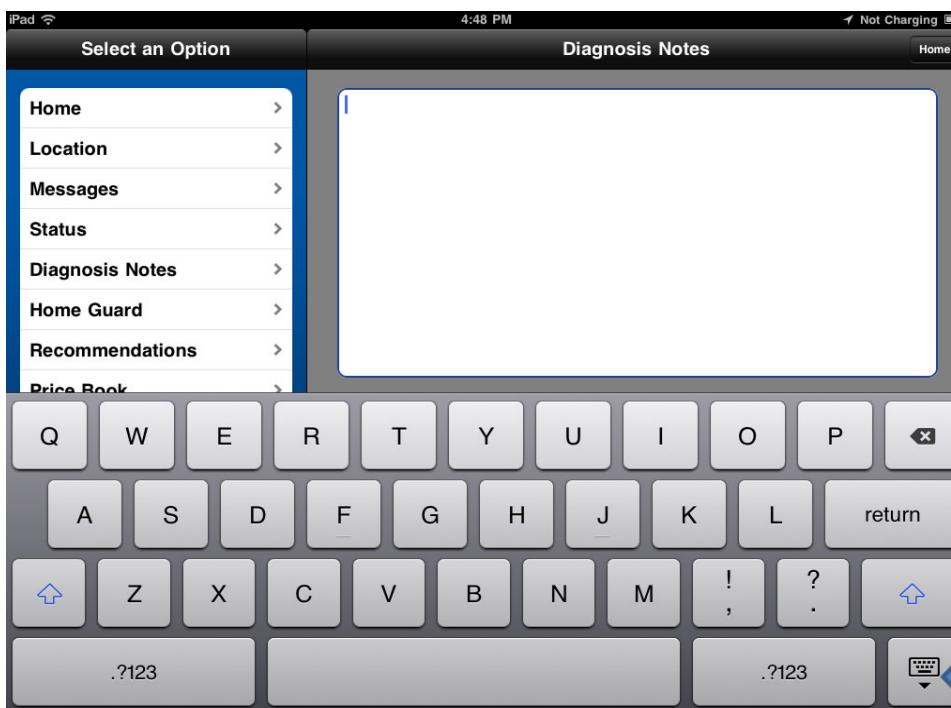
## 9.0 DIAGNOSIS NOTES

Fill in the diagnosis of what the customer would like you to work on. To pull up the keyboard, touch in the white space.



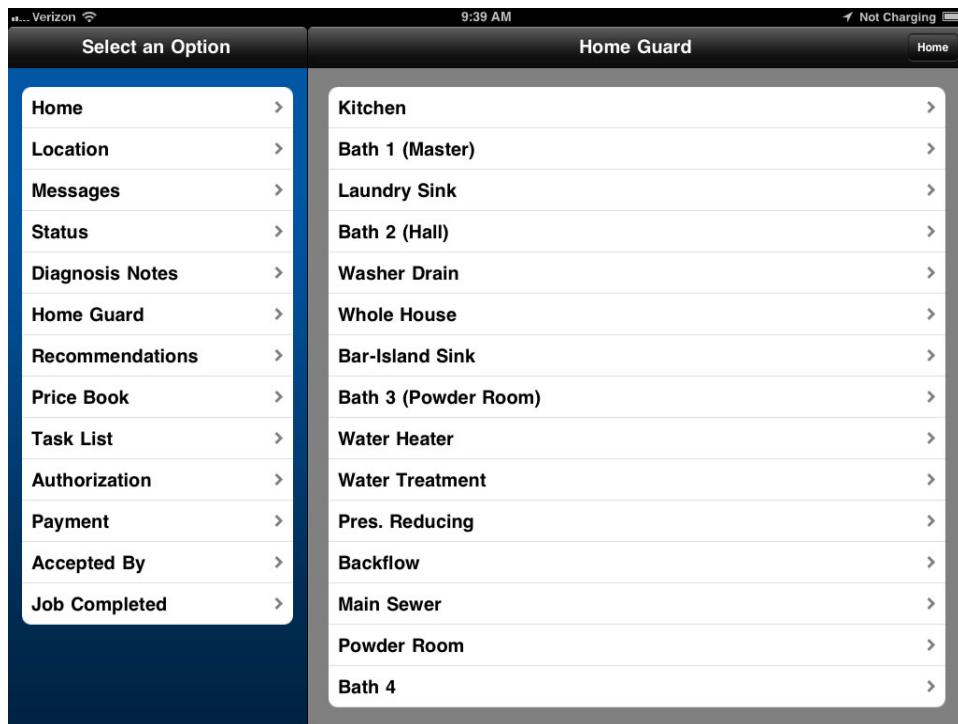
*The notes are from the Service Center, and are shown in the description field*

You can add any diagnosis or comments on the job in this field. To remove the keyboard, touch the keyboard key at the bottom of the screen.



## HomeGuard Screen

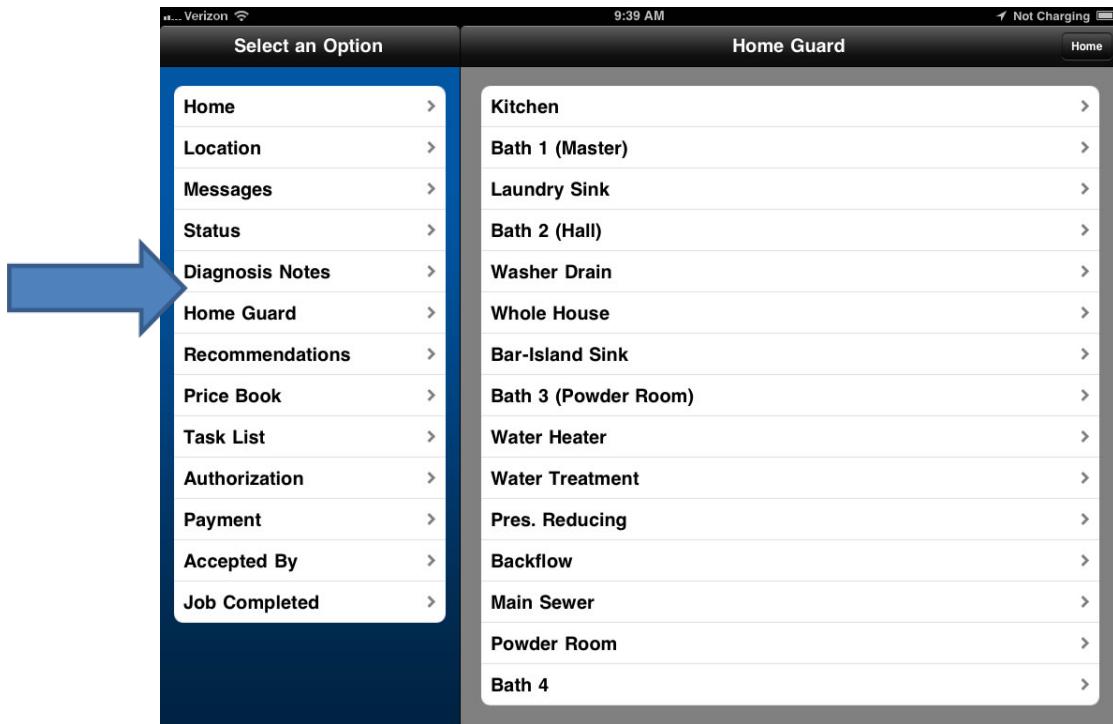
The Home Guard Screen contains all the different locations in a typical home or business.



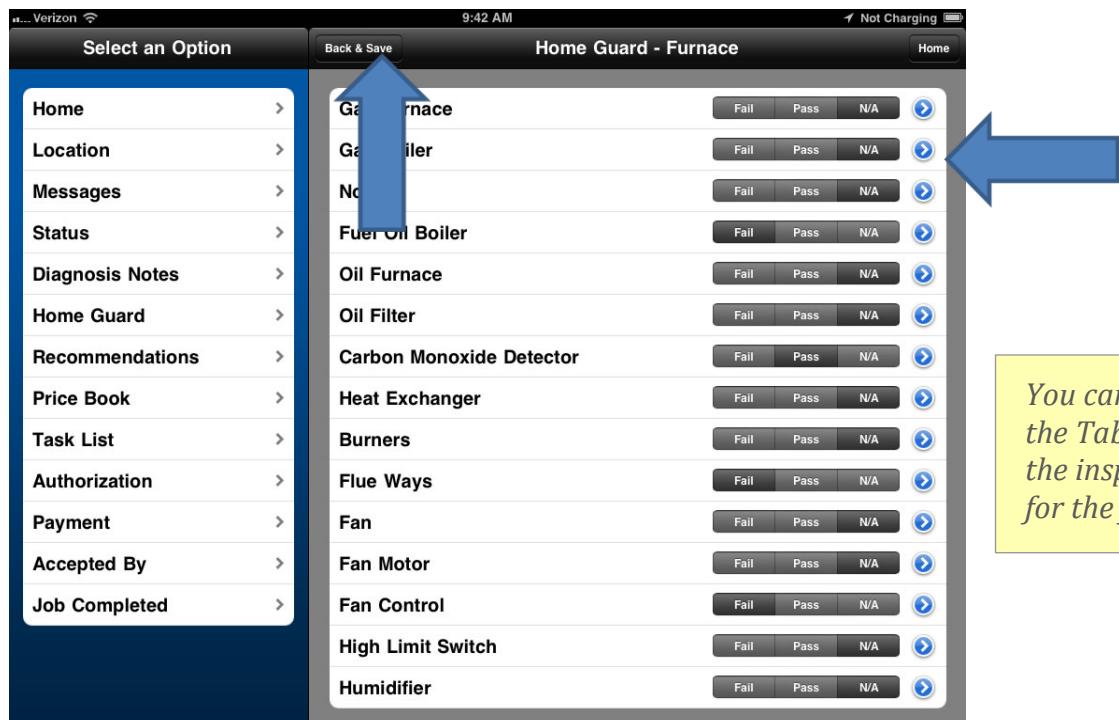
In this Chapter:

## 10.0 HOMEGUARD

Touch the HomeGuard Tab to open the list of headings. Find and touch the initial issue the customer is having.



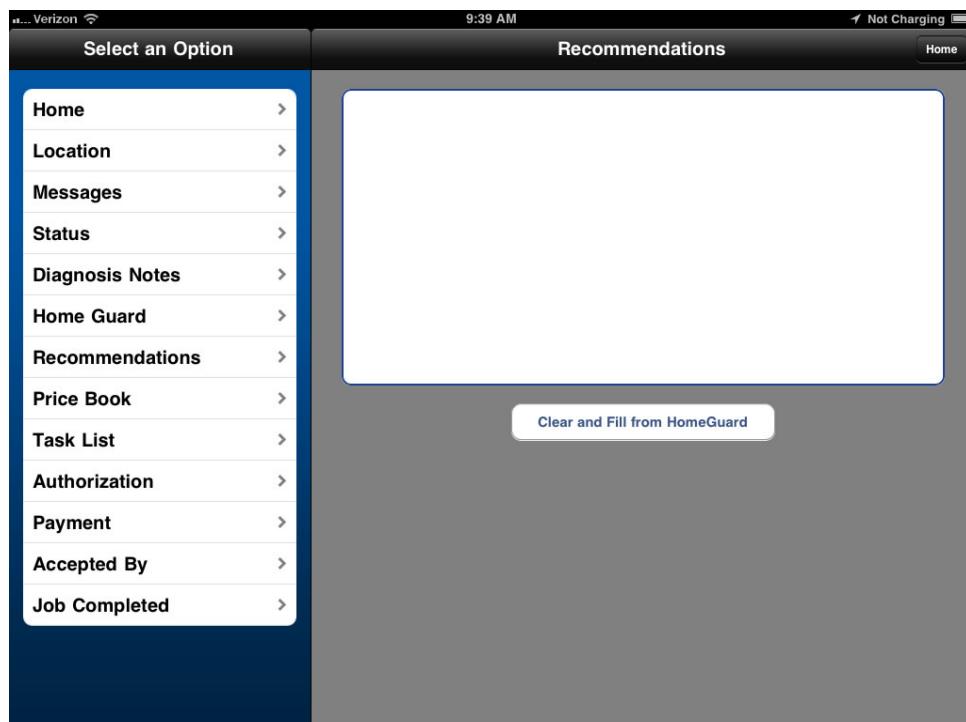
Once you've opened the information you can, touch the "Pass", "Fail" or "N/A". You can also touch the Back & Save to go back to HomeGuard Screen



You can touch the Tabs to do the inspection for the job.

## Recommendation Screen

This screen offers you a means of taking notes on the job.



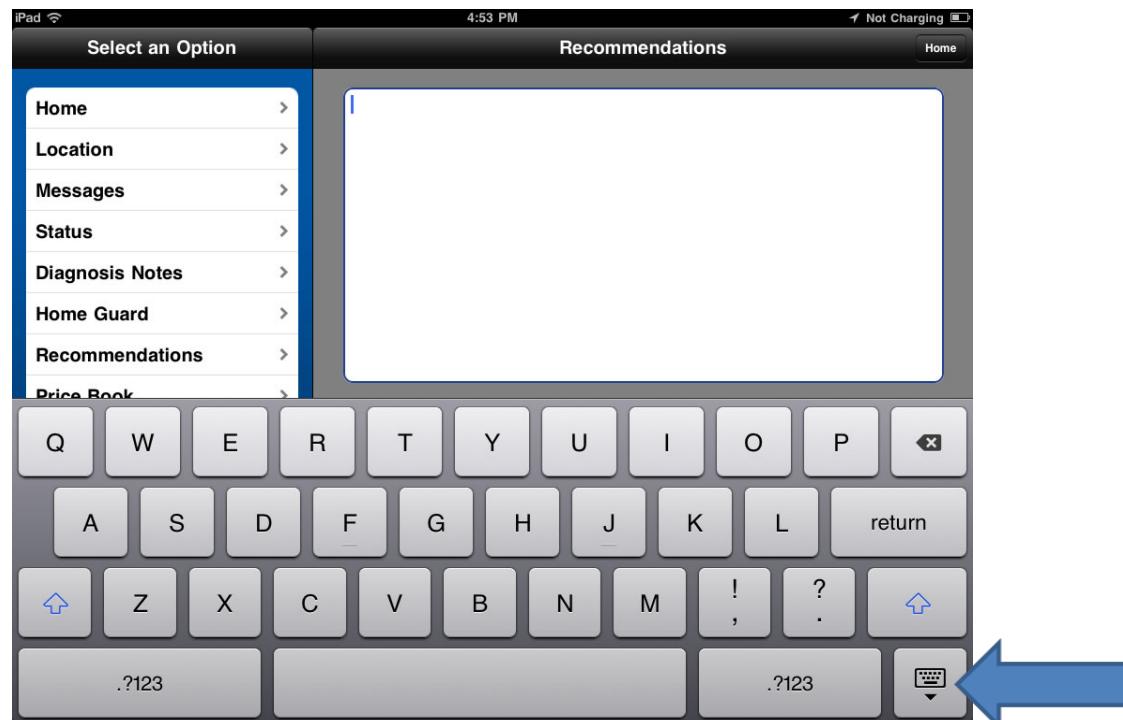
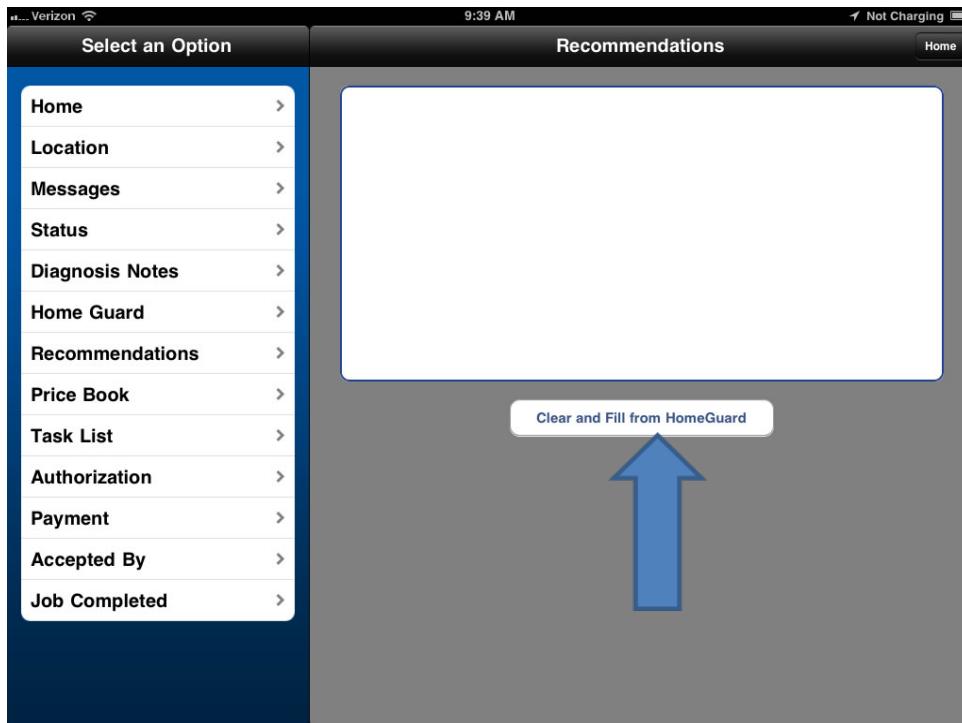
In this Chapter:

Keyboard Usage

## 11.0 Recommendations

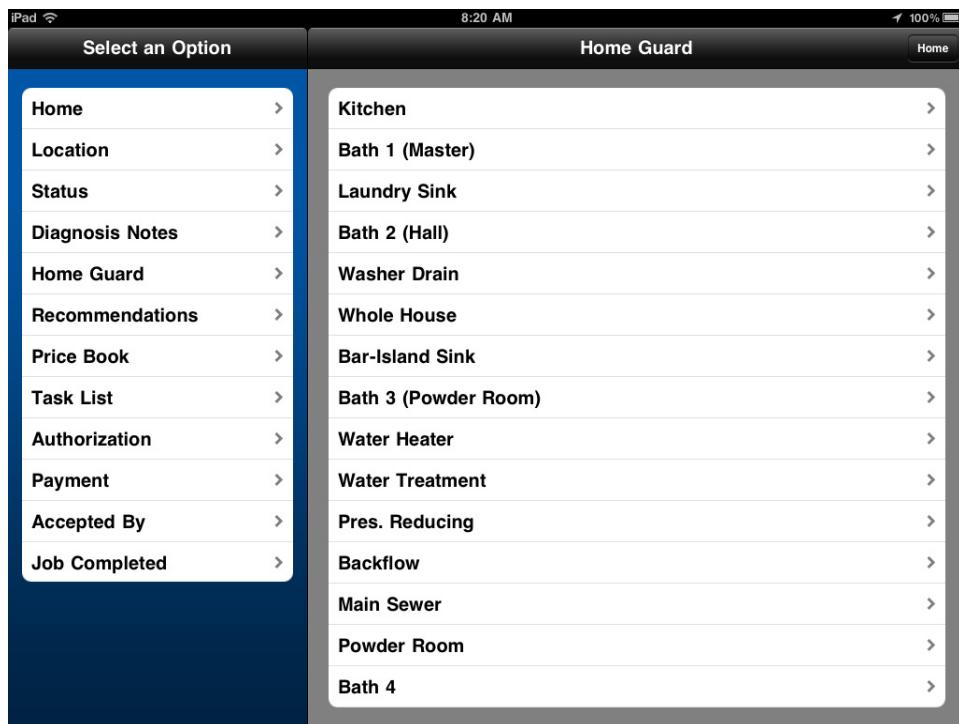


Fill in the recommendation of what the customer would like you to work on. Only failed items will go into the recommendations. Priced items will go to the Task List. To pull up the keyboard, double touch in the white space. To remove it, touch the keyboard key at the bottom of the screen.



## Price Book Screen

The Price Book offers your price book with all your services. The price book is customizable. All services and information is divided into sections and sub sections



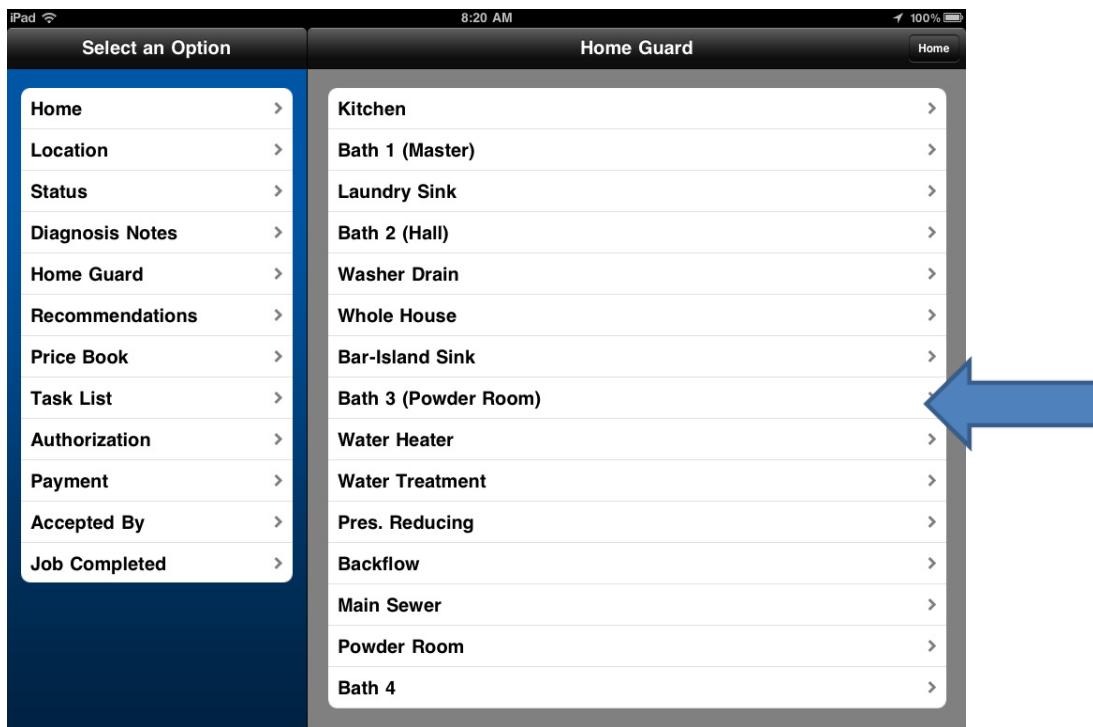
In this Chapter:



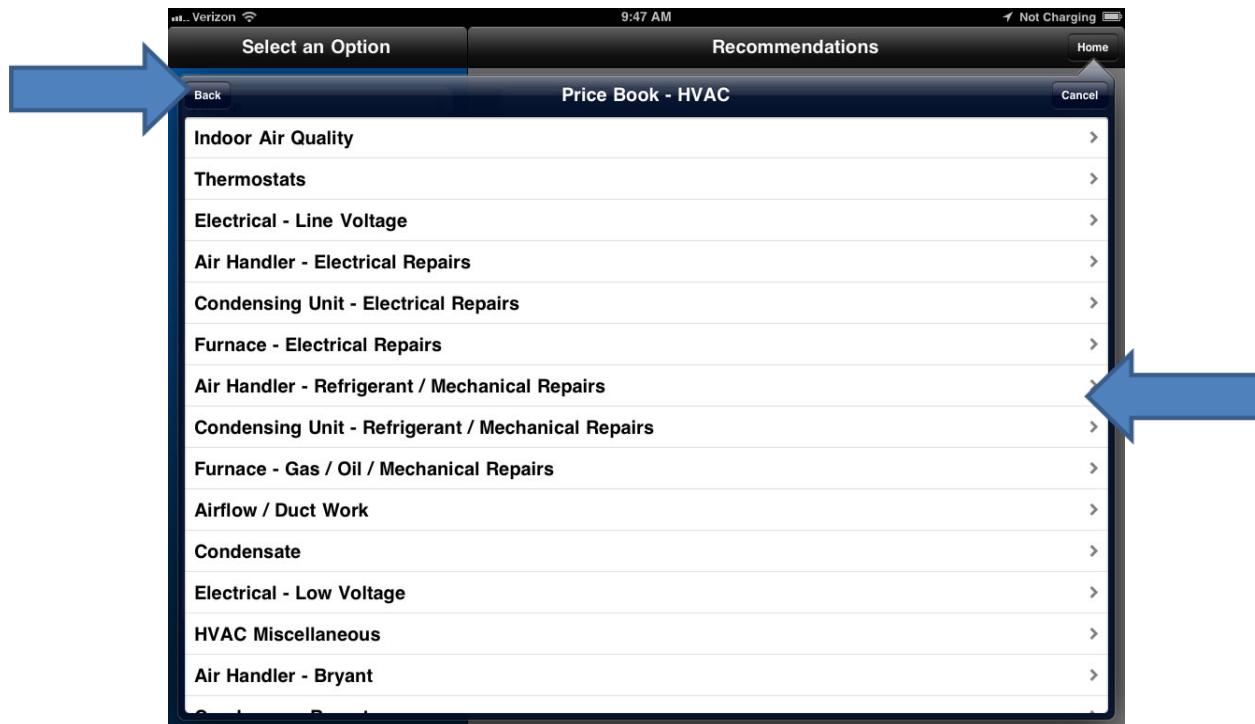
## 12.0 PRICEBOOK SCREEN



Begin by touching the section that applies to the work being done.

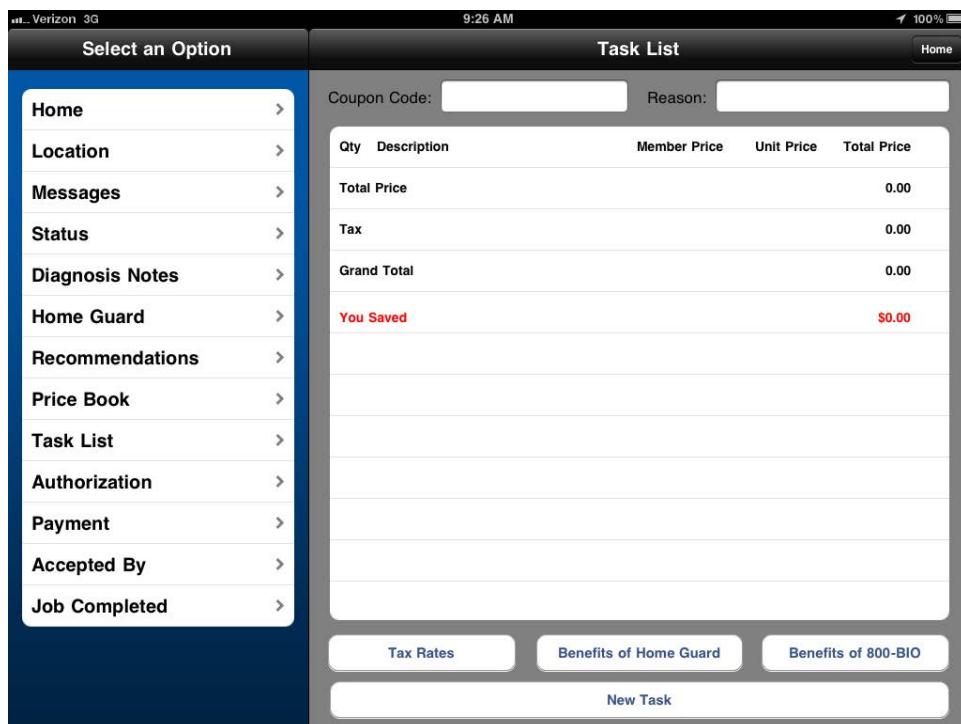


Then touch the subsection. And the related item, that applies. When the check mark appears touch the Back & Save to go back to the previous screen. The touch back again to get to the Price Book. Save & Quit will take you back to the HomeGuard Screen.



## Task List Screen

The Task List gives the customer a view of the work that is going to be done and the pricing. It also offers information on the Home Guard Plan and the liquid drain cleaning system



In this Chapter:

Valuable Information

## 13.0 TASK LIST SCREEN



This is the basic Task List. There is information about the HomeGuard Plan, 800-BIO and Sales Tax

The screenshot shows the 'Task List' screen. On the left is a sidebar titled 'Select an Option' with various menu items. The main area is titled 'Task List' and contains a table with columns: Qty, Description, Member Price, Unit Price, and Total Price. The table shows the following data:

Qty	Description	Member Price	Unit Price	Total Price
	Total Price			0.00
	Tax			0.00
	Grand Total			0.00
	You Saved			\$0.00

At the bottom are buttons for 'Tax Rates', 'Benefits of Home Guard', 'Benefits of 800-BIO', and a large 'New Task' button.

Touch the Task List Tab. Once you have priced the job out of the HomeGuard or the Price Book. If the customer is not a member of the Task List will show the total automatically. If the customer is not a member will see what they could have saved.

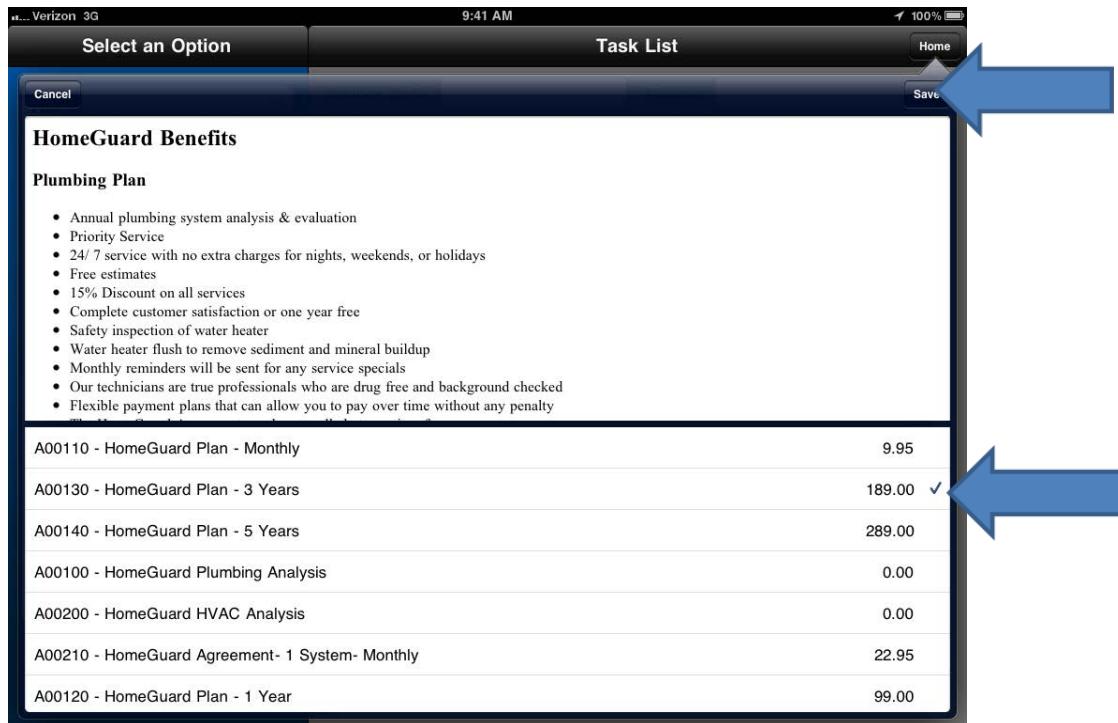
The screenshot shows the 'Task List' screen with a blue arrow pointing to the 'Task List' tab in the sidebar. The main area displays a table with two rows of data:

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 >

The table also includes a 'Total Price' row (456.30), a 'Tax' row (0.00), a 'Grand Total' row (456.30), and a 'You Saved' row (\$78.66). The bottom buttons are identical to the first screenshot.

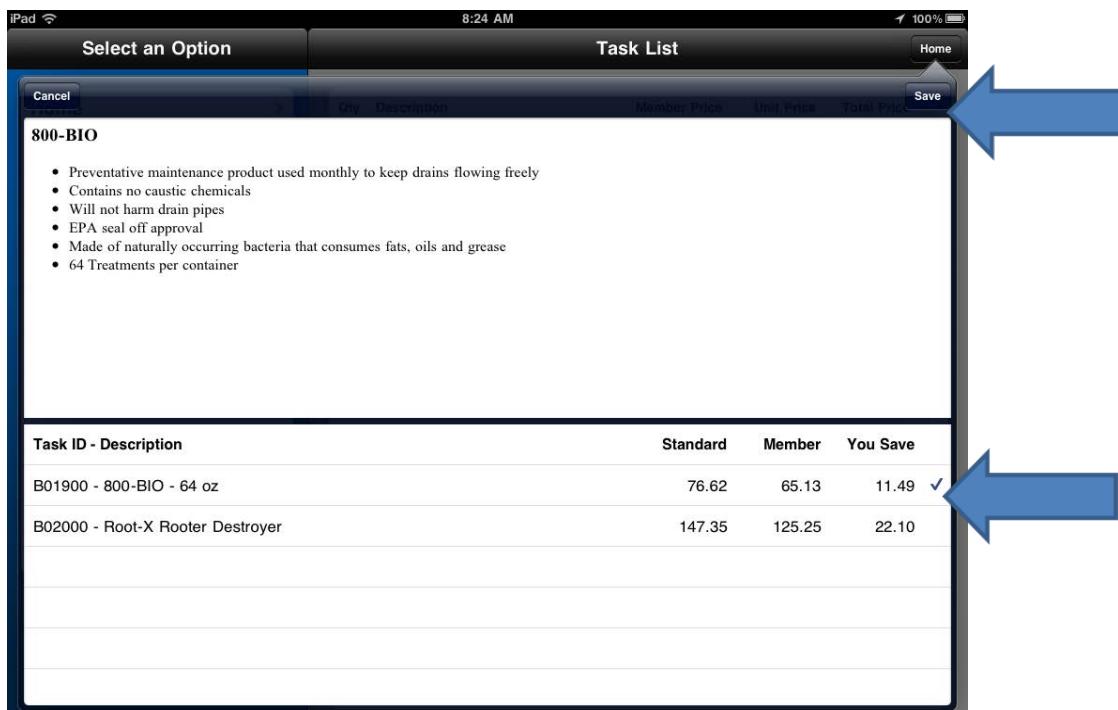
## 13.1 Benefits of HomeGuard

By touching on the HomeGuard Button you can show the customer all the benefits of the HomeGuard System After the customer selects the plan they want, touch the touch Save



## 13.2 Benefits of 800-BIO

By touching on the 800-BIO Tab you can show the customer all the benefits of 800-BIO, after the customer decides to purchase the 800-BIO touch Save



### 13.3 Task List

Once the HomeGuard and the 800-BIO have been added the iPad will calculate the new price and show the customer what they have saved, by becoming a HomeGuard member

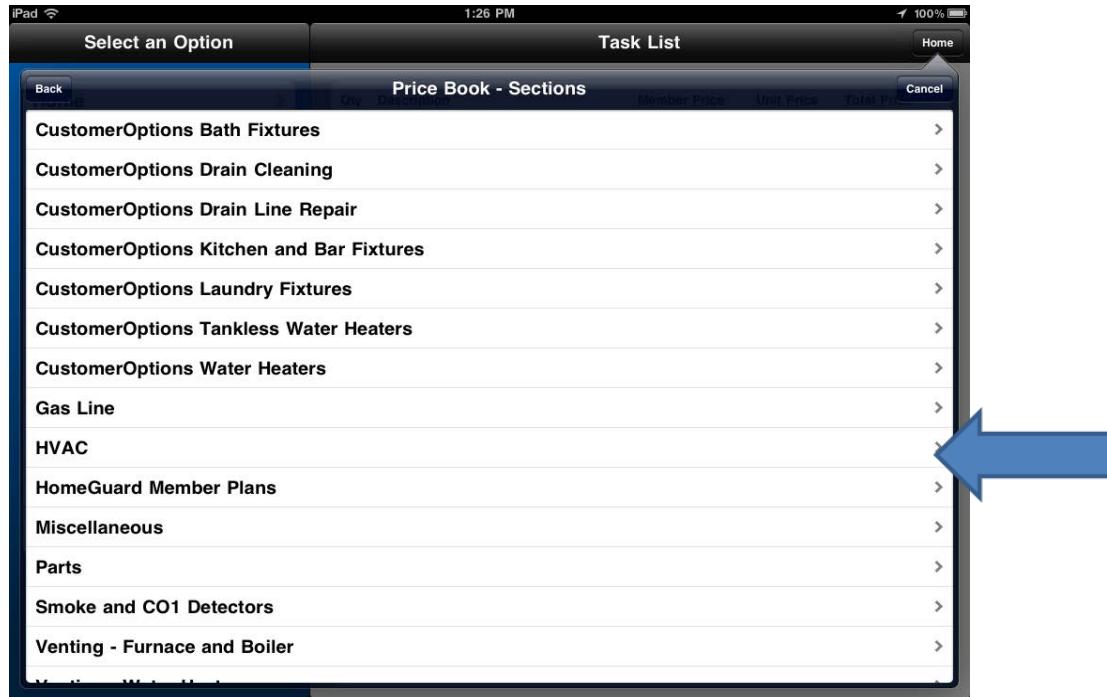
The screenshot shows the iPad's Task List screen. On the left is a sidebar with various service categories: Home, Location, Messages, Status, Diagnosis Notes, Home Guard, Recommendations, Price Book, Task List, Authorization, Payment, Accepted By, and Job Completed. The main area displays a table of services with columns for Qty, Description, Member Price, Unit Price, and Total Price. The table includes four rows: a condenser coil split and clean, a Schrader valve core replacement, a 3-year HomeGuard plan, and a 64 oz 800-BIO bottle. Below the table, the total price is listed as \$710.43, tax is \$0.00, and the grand total is \$710.43. A red text box highlights "You Saved" with a value of \$90.15. At the bottom are buttons for Tax Rates, Benefits of Home Guard, Benefits of 800-BIO, and a prominent blue "New Task" button.

### 13.4 Adding a Task (if necessary)

Should the customer ask you to add a task to the job you are working on, touch the New Task Button.

This screenshot is identical to the one above, showing the Task List screen with the same service details and savings information. A large blue arrow points directly to the "New Task" button at the bottom of the screen, highlighting it as the action to take if a customer asks for a new task.

This will open the Price Book. Touch the on appropriate task.



Choose the appropriate item the customer wants (1). The iPad will make this an additional task. Once you've made your selection touch Save & Quit (2).

HVAC - Condensing Unit - Refrigerant / Mechanical Repairs				Save & Quit
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 iPad will calculate the new total and include the added task. The customer can see the new total and also show what they saved as part of the HomeGuard Plan.

The screenshot shows the iPad app interface. On the left is a sidebar titled "Select an Option" with various menu items. The main screen is titled "Task List" and displays a table of tasks with columns for Qty, Description, Member Price, Unit Price, and Total Price. At the bottom of the table, it shows "Total Price" as \$724.49, "Tax" as \$0.00, and "Grand Total" as \$724.49. Below this, a red box highlights the "You Saved" section which shows "\$92.63". A large blue arrow points from the right side towards this "You Saved" section.

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
<b>Total Price</b>				<b>724.49</b>
<b>Tax</b>				<b>0.00</b>
<b>Grand Total</b>				<b>724.49</b>
<b>You Saved</b>				<b>\$92.63</b>

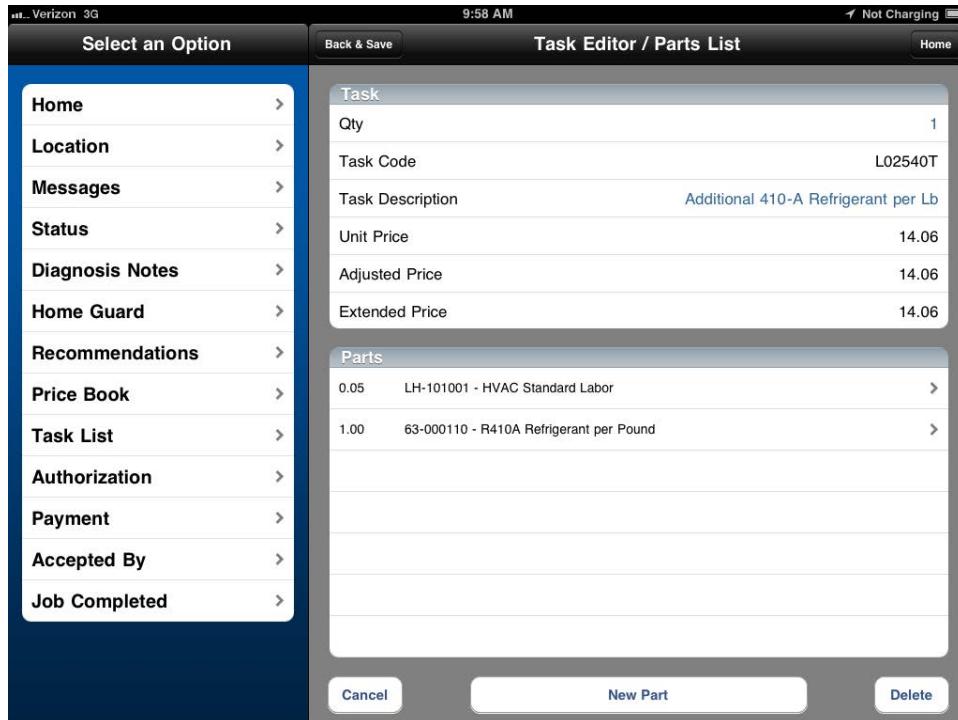
### 13.5 To Remove an item from the Task List

If you have to remove a task from the task list, simply touch the item you want to remove.

This screenshot is identical to the one above, showing the iPad app's "Task List" screen. It displays the same table of tasks and the "You Saved" section showing "\$92.63". A large blue arrow points from the right side towards the "You Saved" section.

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
<b>Total Price</b>				<b>724.49</b>
<b>Tax</b>				<b>0.00</b>
<b>Grand Total</b>				<b>724.49</b>
<b>You Saved</b>				<b>\$92.63</b>

When this screen opens up, confirm that the task you want to delete is on the screen. If it is correct, touch the delete Button to remove the task.

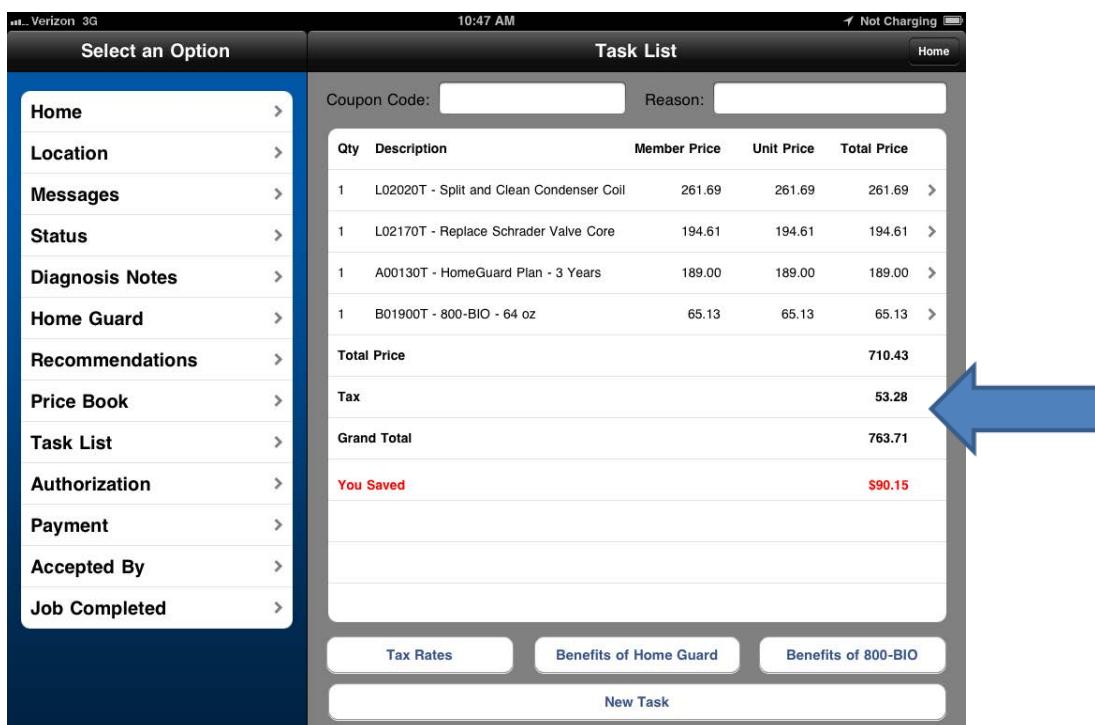
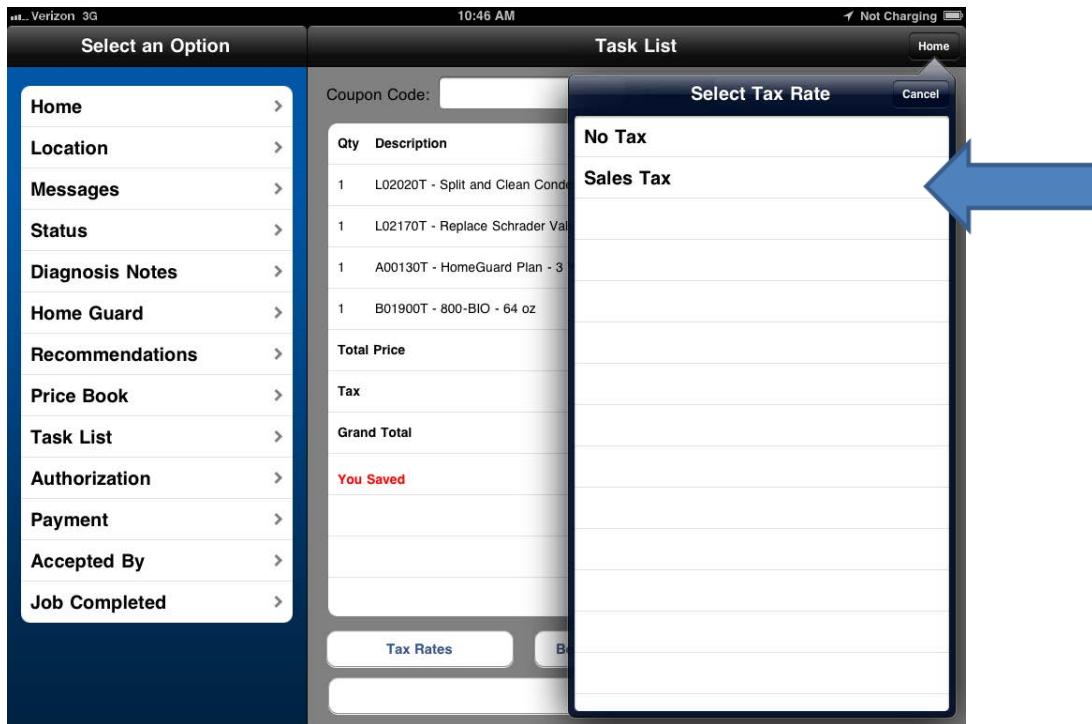


Once you touch the delete screen, a box will come up asking if you are sure you want to delete the task from the job. Touch the OK Button if you are ready to delete the task. The iPad will recalculate the price for you.



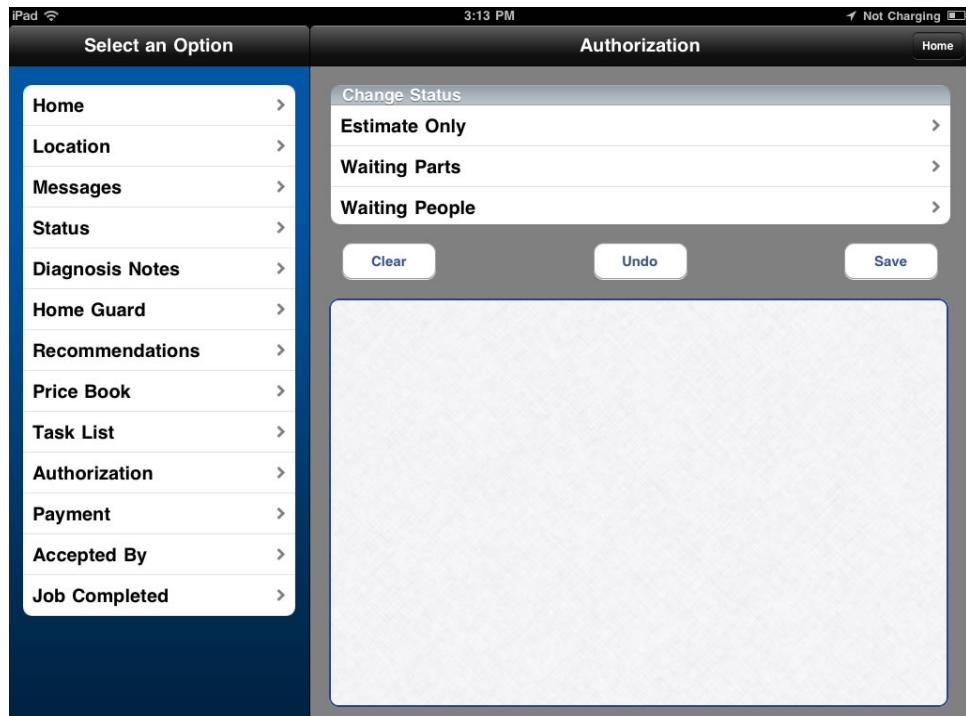
## 13.6 Sales Tax

If you select the sales tax the iPad will automatically calculate the tax for your area.



## Authorization Screen

The Authorization Tab is for when the customer has agreed on the price and is ready to either begin work or get an estimate.

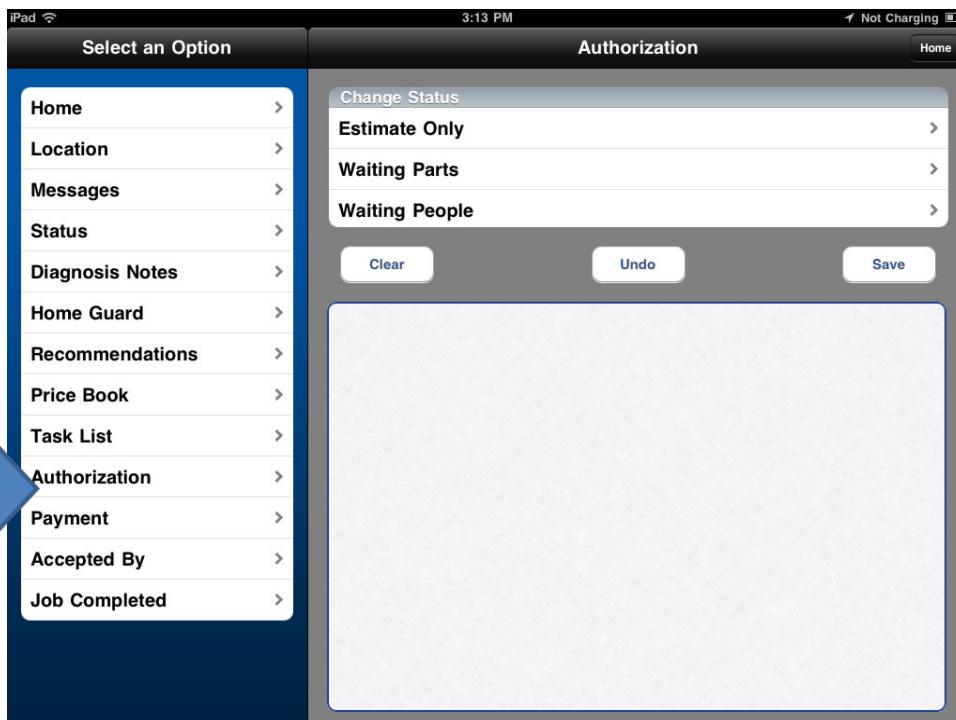


In this Chapter:

⌚ Important Information

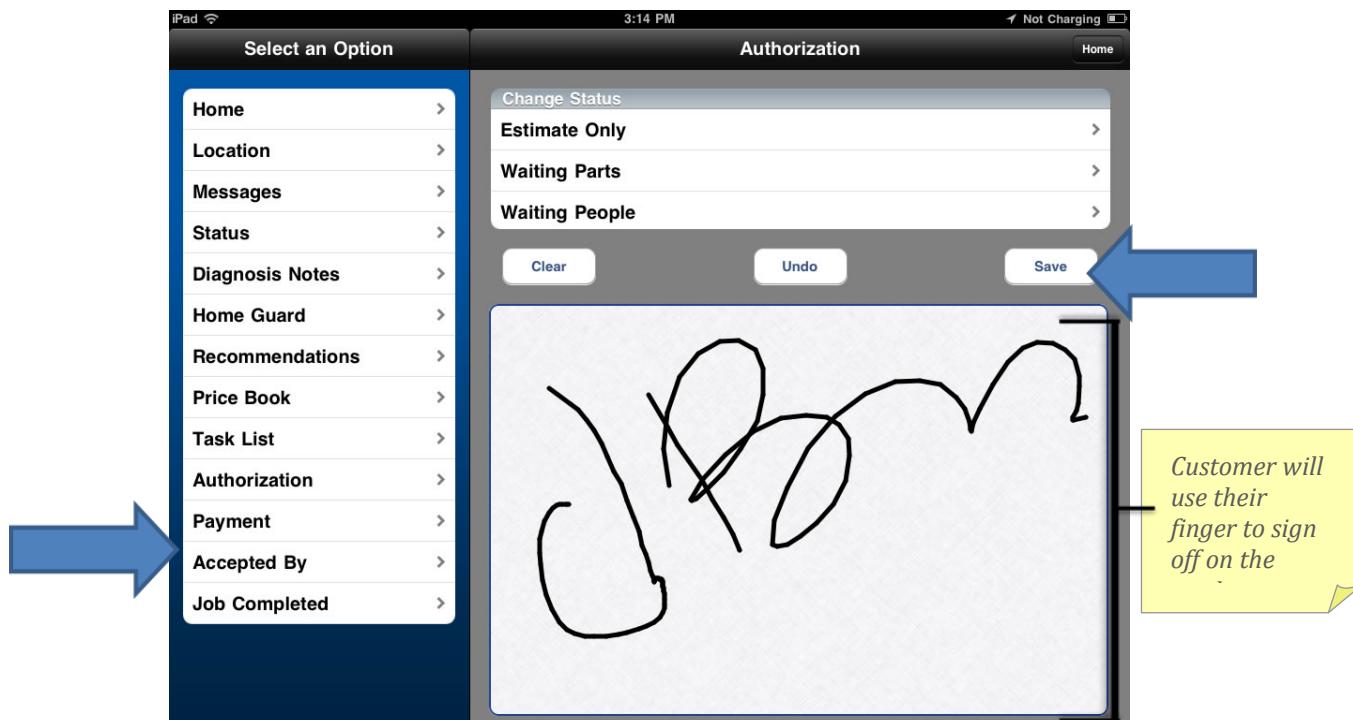
## 14.0 Authorization Screen

Touch the Authorization Tab.



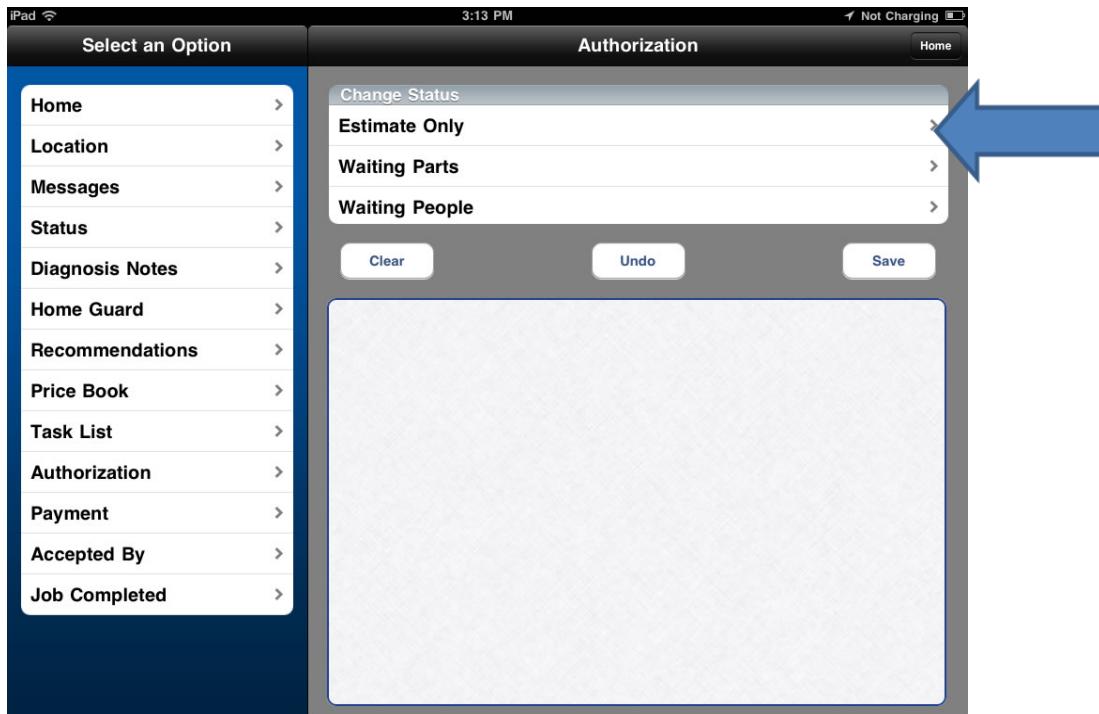
### 14.1 Proceed with the Work

If the customer wants to proceed with the work and you have agreed on the price have the customer sign their name in the box, then touch Save.



## 14.2 For Estimates Only

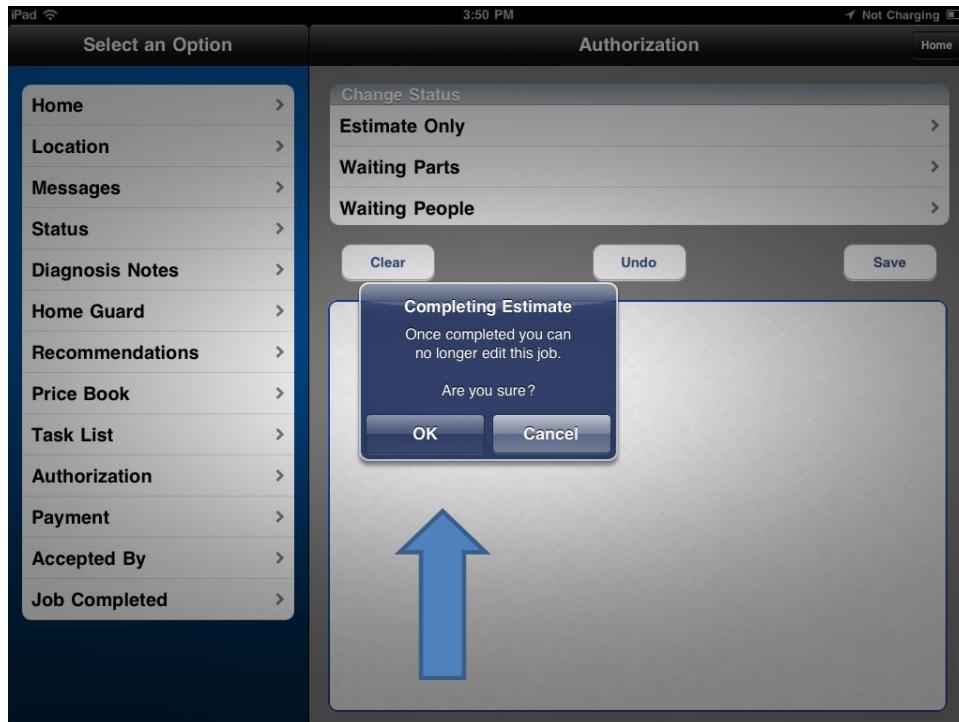
If the customer only wants an estimate simply touch the Estimate Button at the top of the screen.



When you touch the Estimate Button, the iPad will set the status to Active. Touch OK



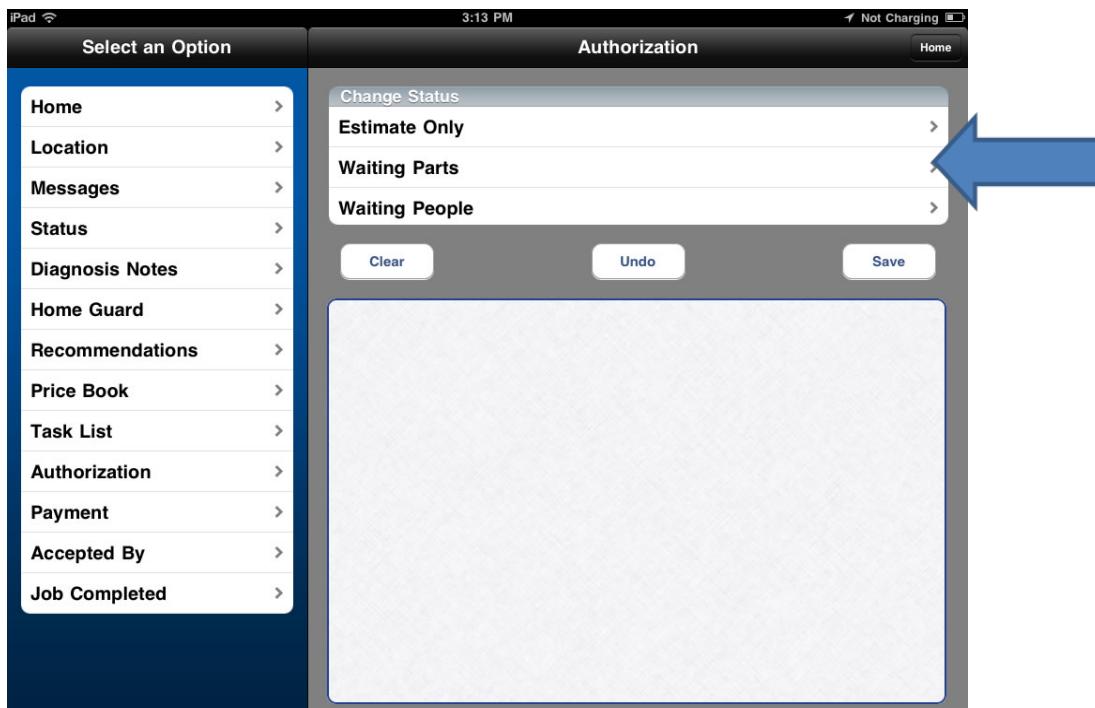
The iPad will then ask you if you are sure you want to complete the Estimate.



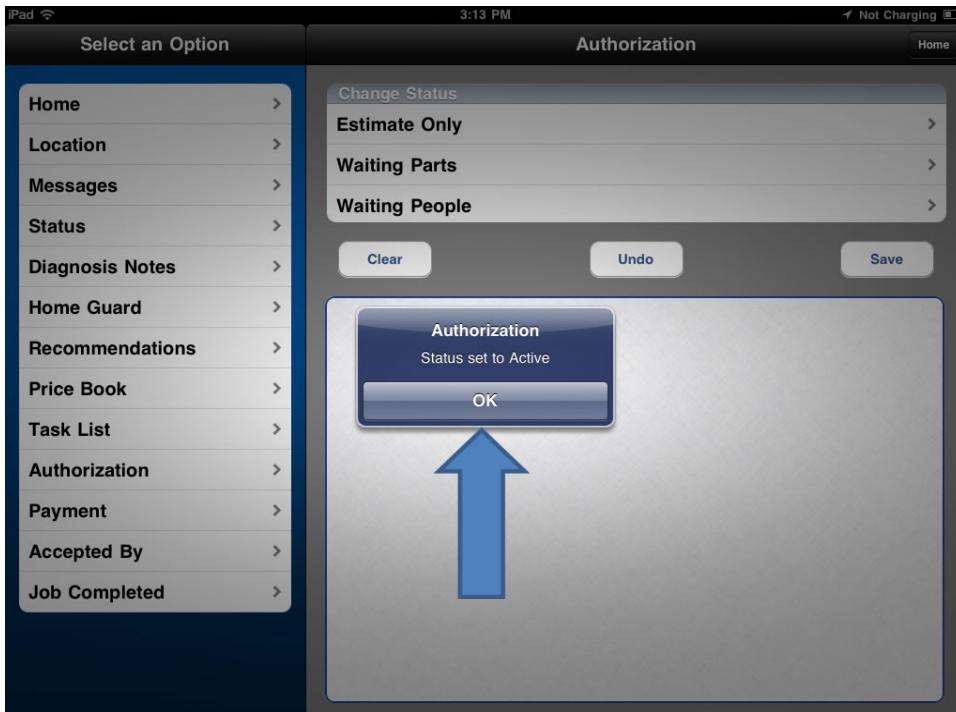
 **PLEASE NOTE:** If you touch the OK Button the job will go back to the office and it will no longer be in the iPad

### 14.3 Waiting Parts

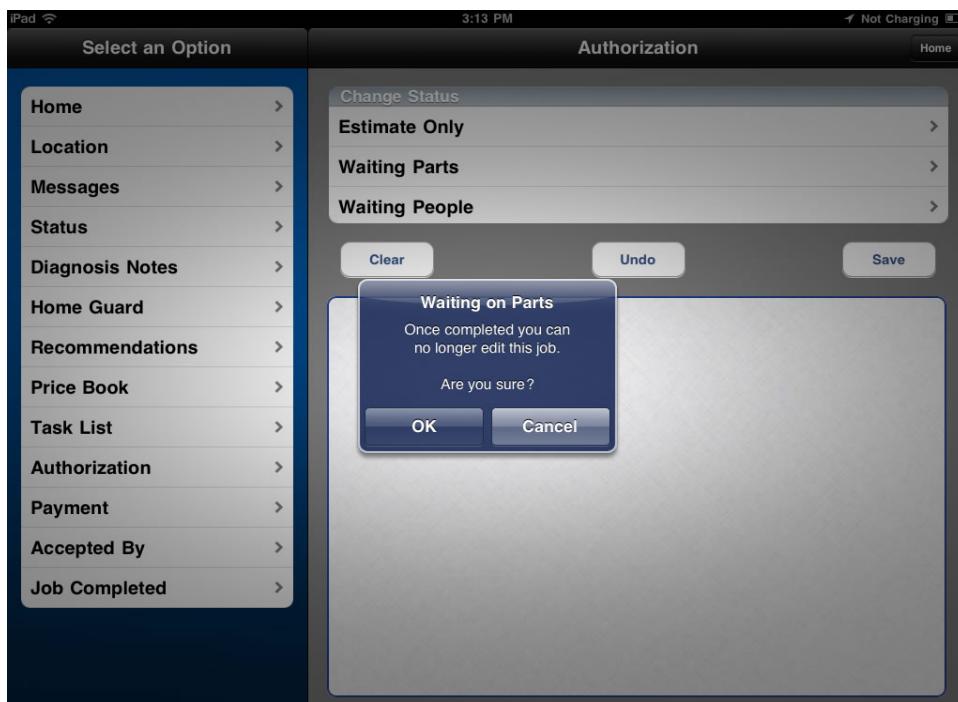
If you need parts to complete the job, touch Waiting Parts



When you touch the Waiting Parts Button, the iPad will set the status to Active. Touch OK



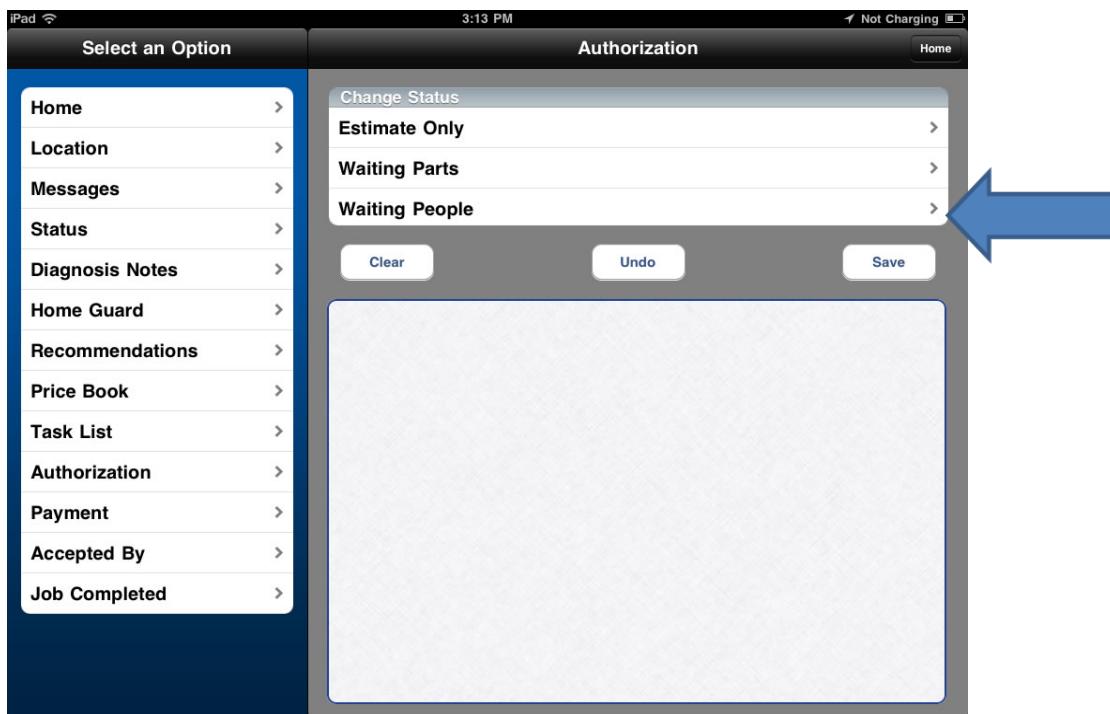
Once you have touched OK it will ask you to confirm your answer.



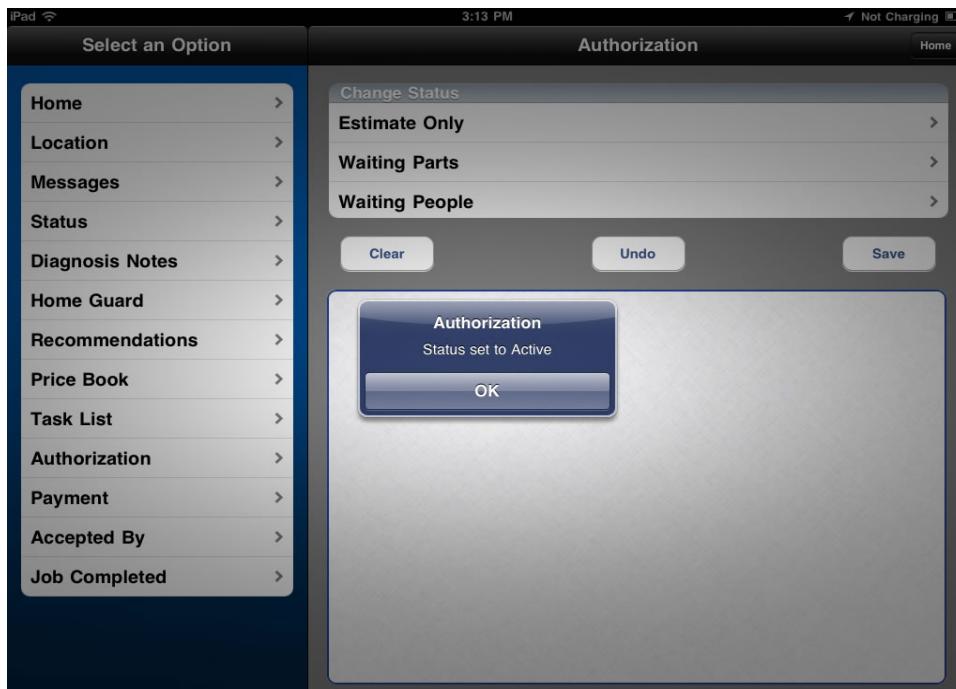
**PLEASE NOTE:** If you touch the OK Button the job will go back to the office and it will no longer be in the iPad

## 14.4 Waiting People

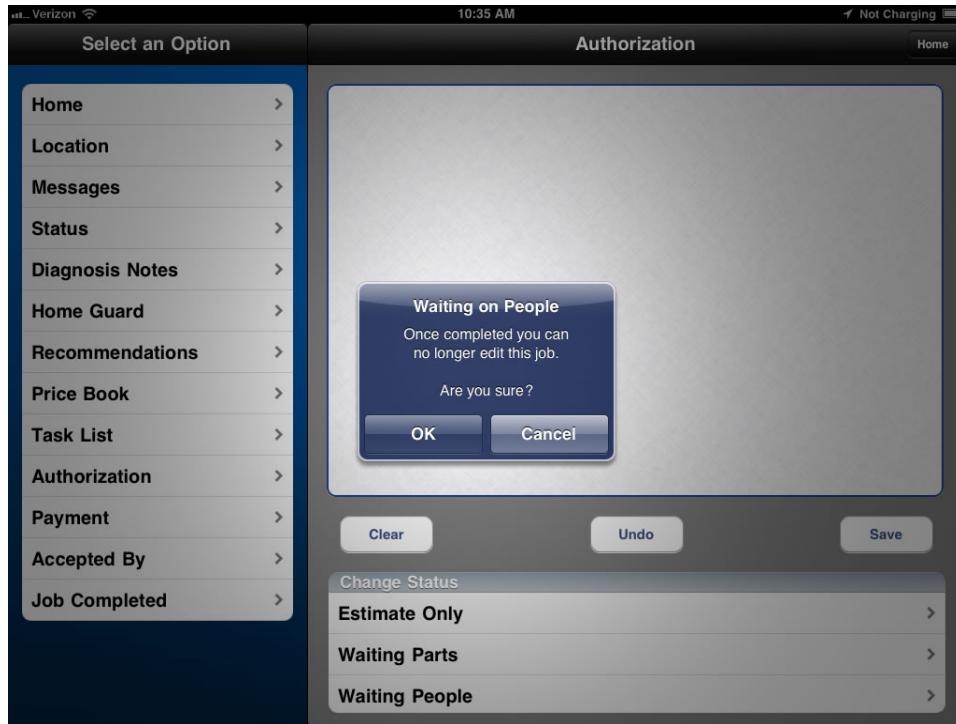
If you need assistance to complete the job touch Waiting People, Touch OK and the iPad will change your status to Active.



When you touch the Waiting Parts Button, the iPad will set the status to Active. Touch OK



Once you have touched OK it will ask you to confirm your answer.



 **PLEASE NOTE:** If you touch the OK Button the job will go back to the office and it will no longer be in the iPad

## Payment Screen

Now that the work has been authorized and completed, it's time for payment.

The screenshot shows a mobile application interface. On the left, a vertical navigation menu titled "Select an Option" lists various items: Home, Location, Messages, Status, Diagnosis Notes, Home Guard, Recommendations, Price Book, Task List, Authorization, Payment, Accepted By, and Job Completed. The "Payment" item is highlighted with a white background. The main content area is titled "Payment". It includes sections for "Warranty and Contact Information" with a "Warranty" dropdown menu showing options like 30 Days, 60 Days, 90 Days, 120 Days, 1 Year, and No Warranty. Below this is a "Email Address" field with placeholder text "[enter email address]". A "Add Payment" section follows, containing a "Payment Type" dropdown with options Cash, Check, AmEx, Disc, MC, Visa, and Coupon. There is also an "Amount" field with placeholder text "[enter amount]" and an "Authorization / Check Number" field with placeholder text "[enter authorization / check #]". At the bottom is a "Submit" button with a circular arrow icon. The top of the screen shows a status bar with signal strength, the time 10:47 AM, and battery level.

In this Chapter:



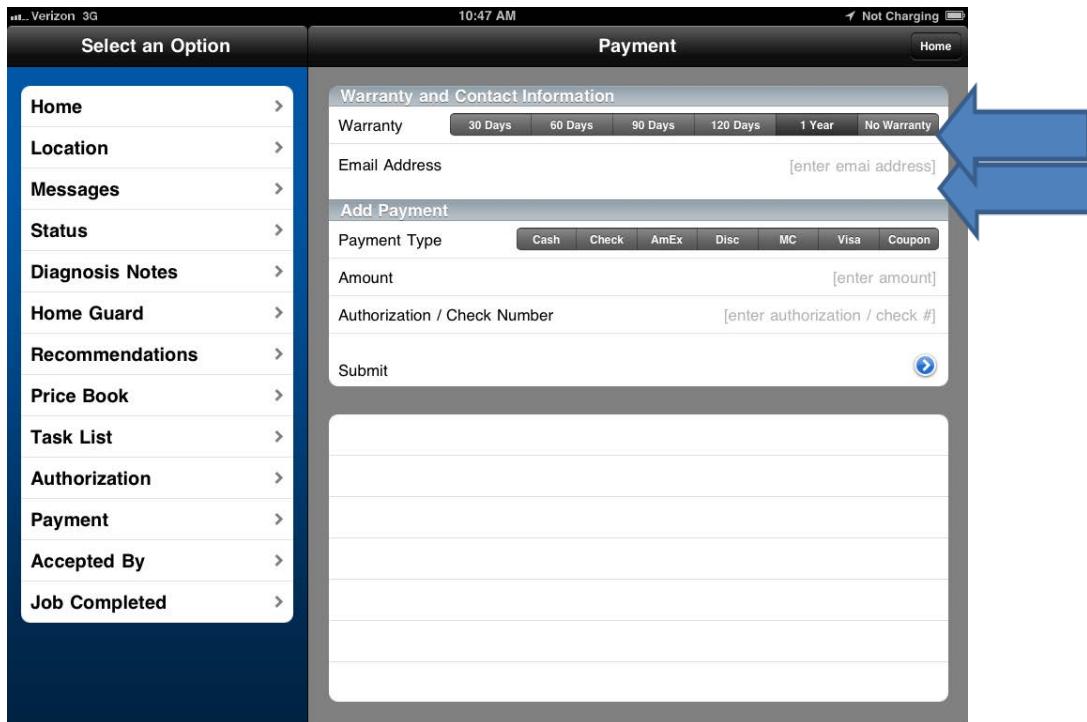
Keyboard Usage



Valuable Information

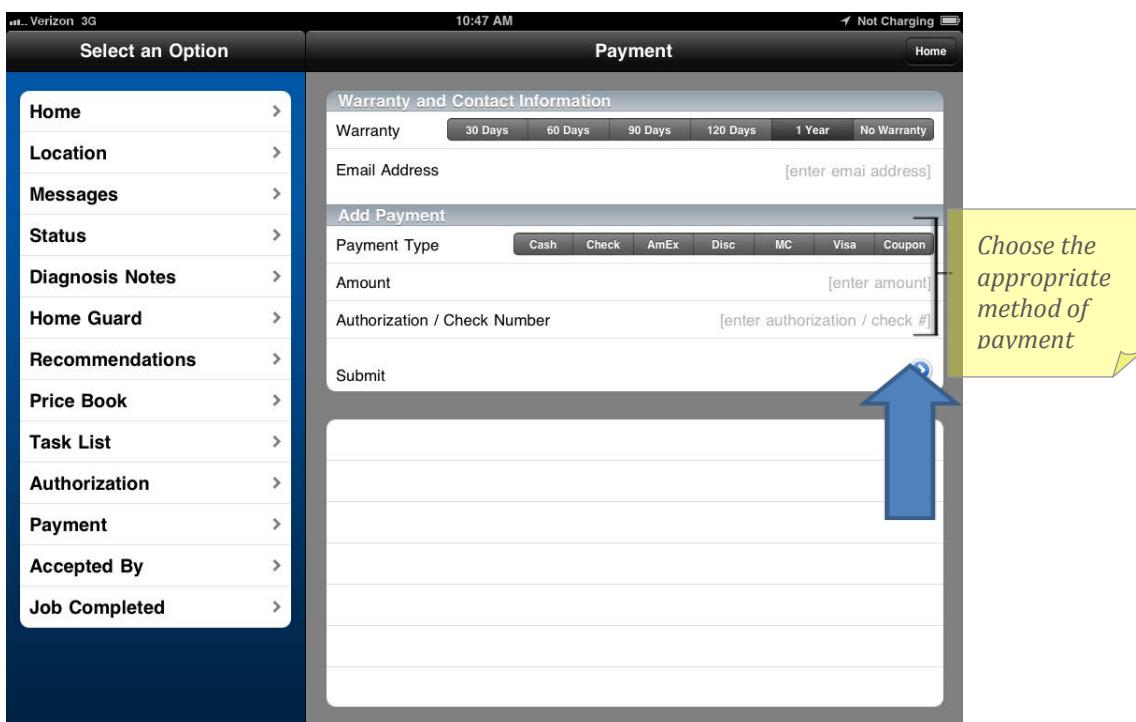
## 15.0 PAYMENT SCREEN

Warranty and Contract information appears at the top of the Payment Screen. Unless you touch another option, the iPad will automatically default to one year. There is also a place to verify the customer's email address on this screen as well.



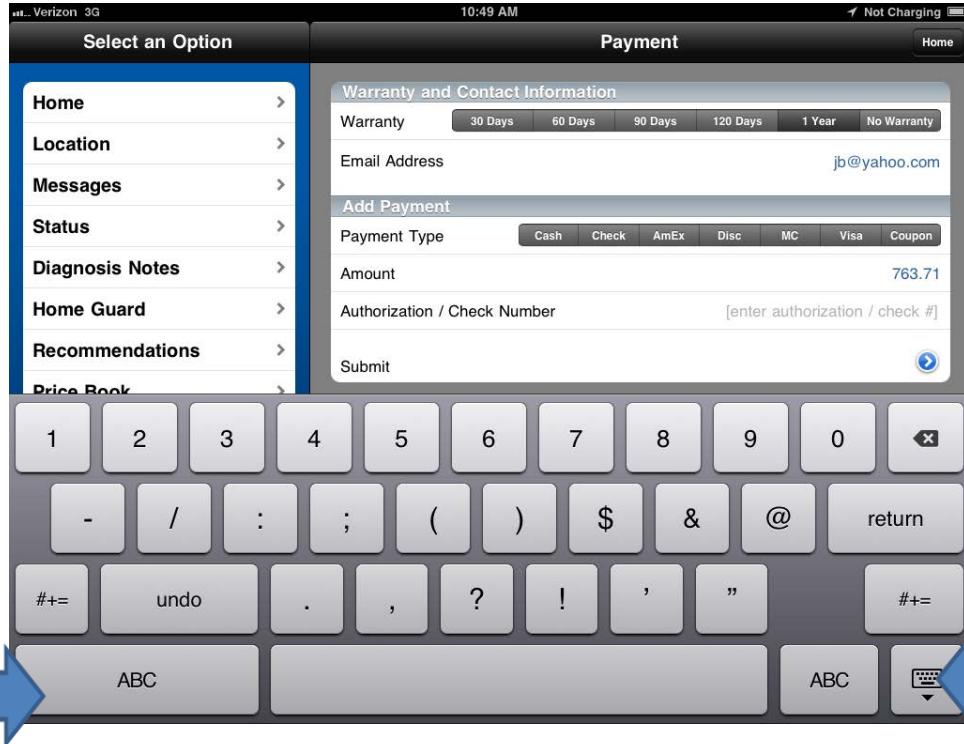
### 15.1 Payment

Fill in all the payment information and then touch the blue Arrow Button with the arrow on it to submit the payment.



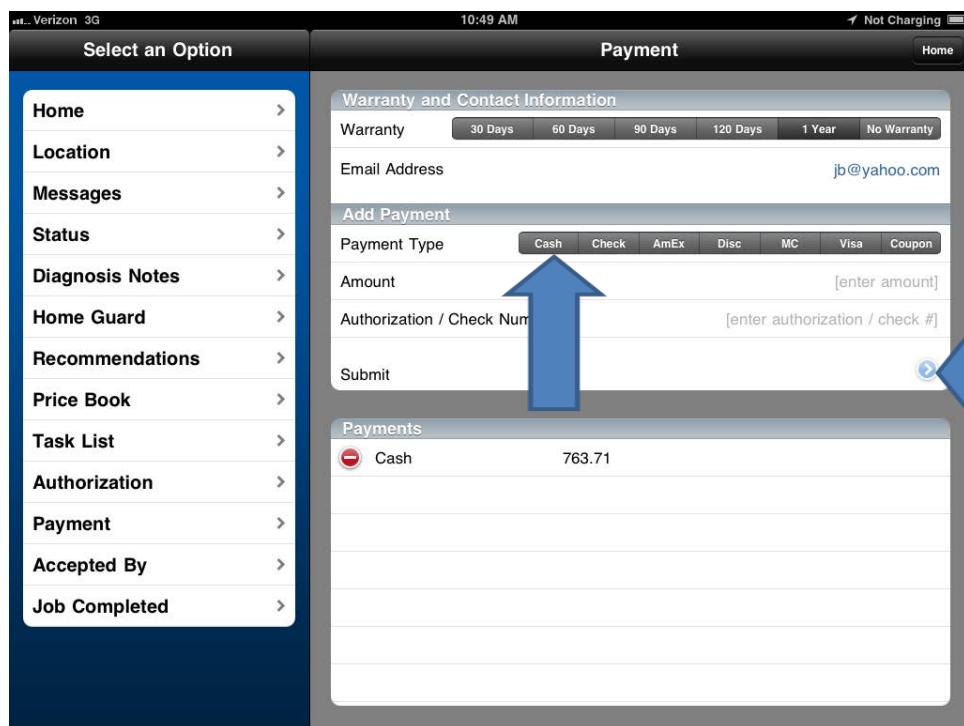


You can enter information into the screen with the keyboard. To open the keyboard, tap the email area. You can touch on the ABC key to get back to the letters (1). You can collapse the keyboard by touching the keyboard key (2)

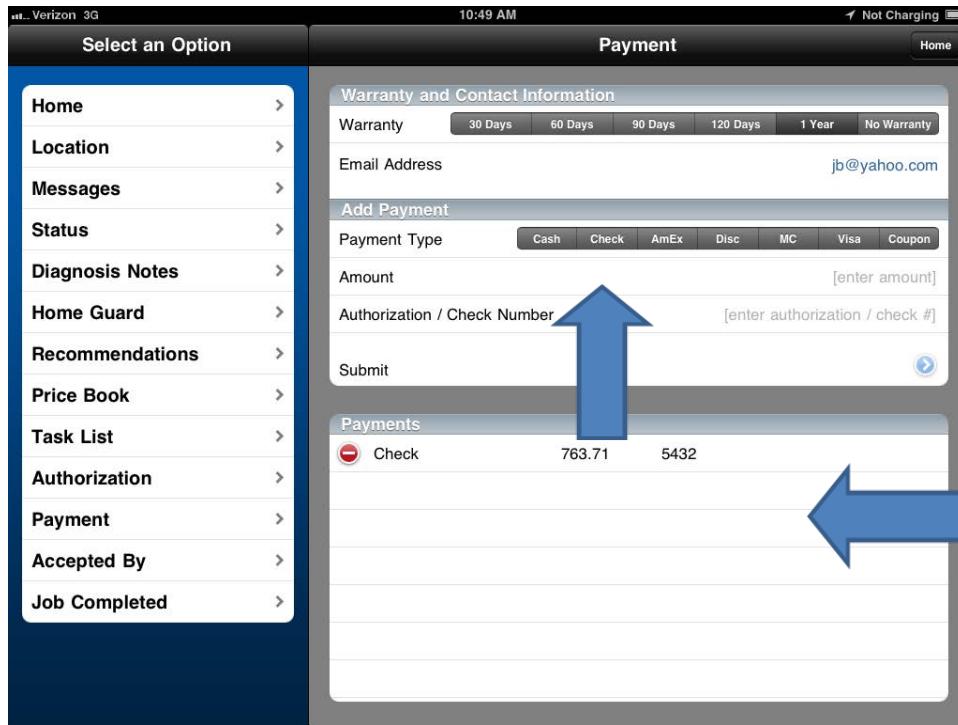


## 15.2 Cash or Check

If the customer is paying cash touch the Cash Button enter the amount, and touch Submit.

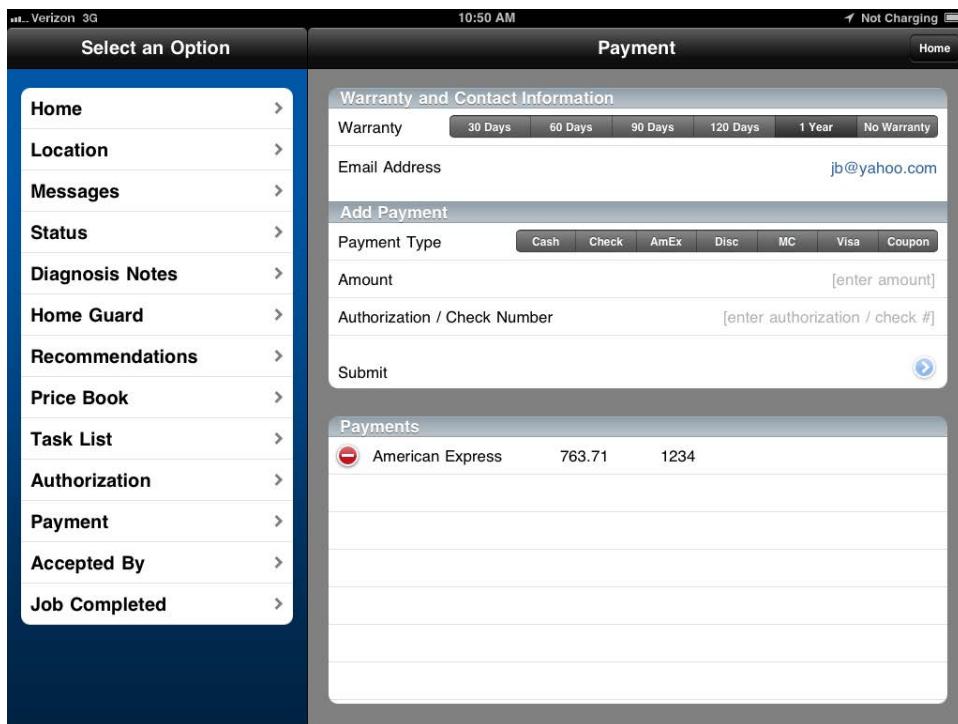


For a customer who wants to pay with a check touch the Check Tab and then fill in the amount. Then enter the check number and touch Submit.



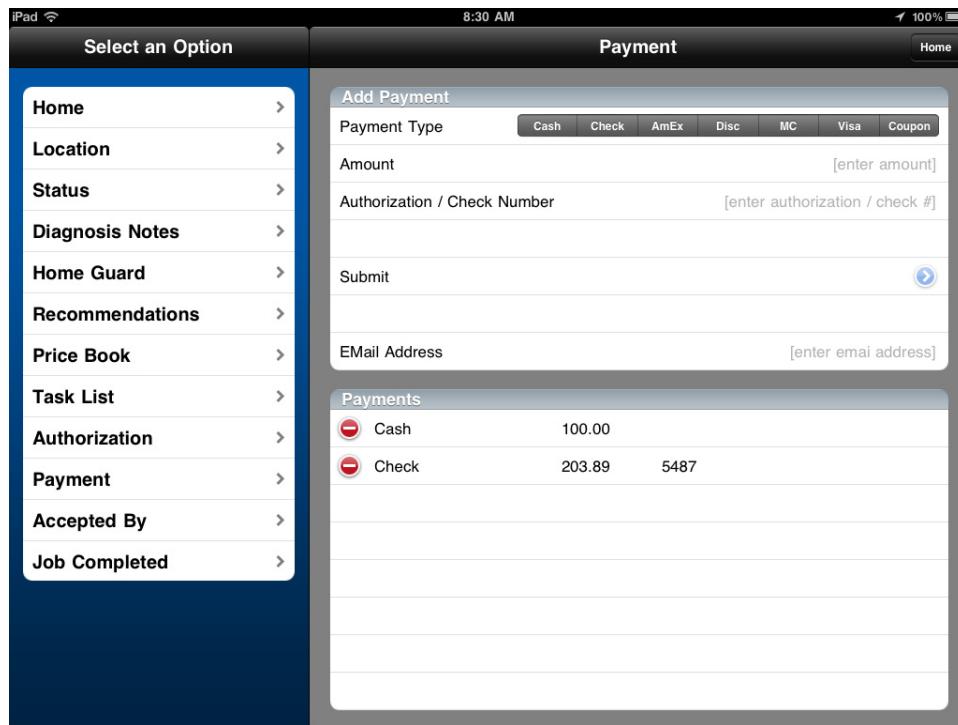
### 15.3 Credit Card Payment

If the customer wants to pay with a credit card, touch the type of card being used, enter the amount and then touch Submit.



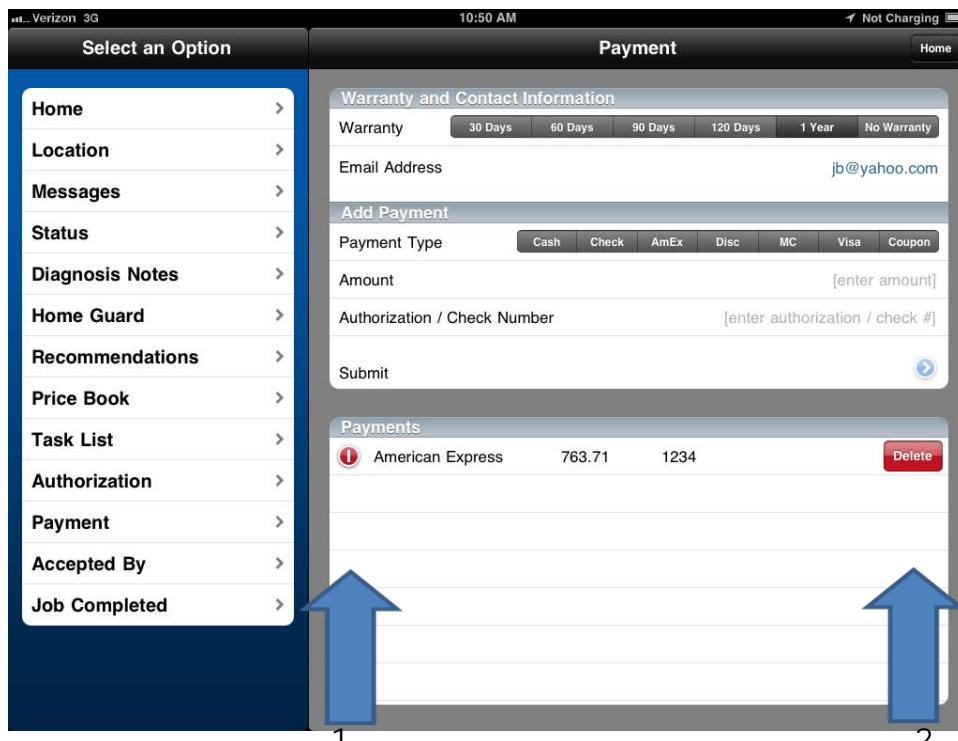
## 15.4 Multiple forms of Payment

If your customer wants to use two (2) different types of payment, it is easy to put them in. Simply enter in each payment separately. The iPad will calculate the balance.



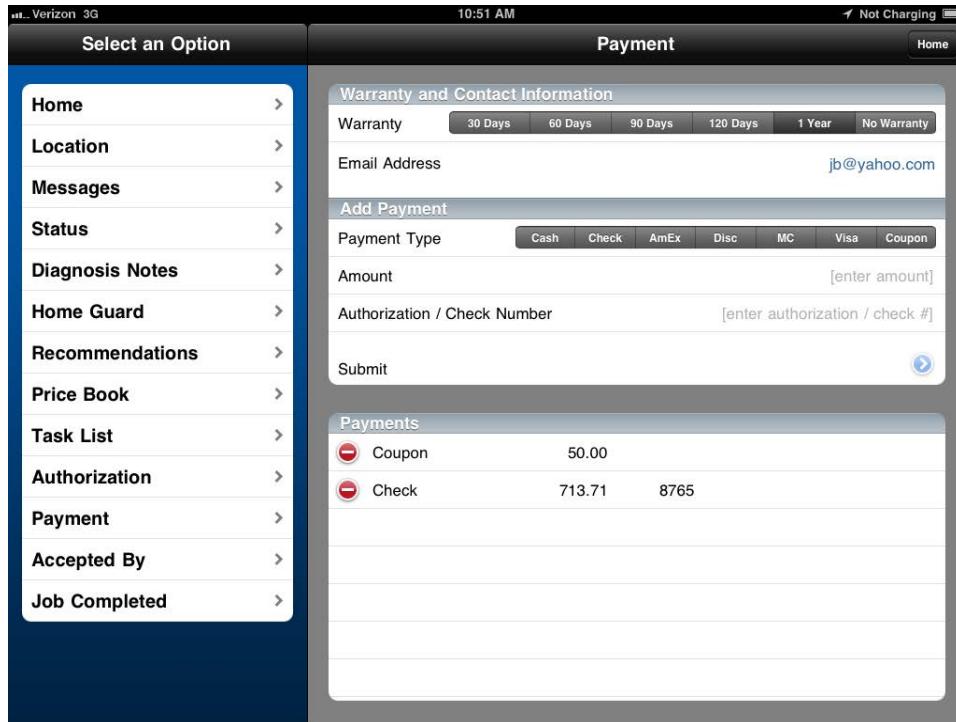
## 15.5 Deleting a Payment

If for any reason you need to delete a payment, simply touch on the red Button (1). Then touch the delete Button and the payment will be deleted (2).



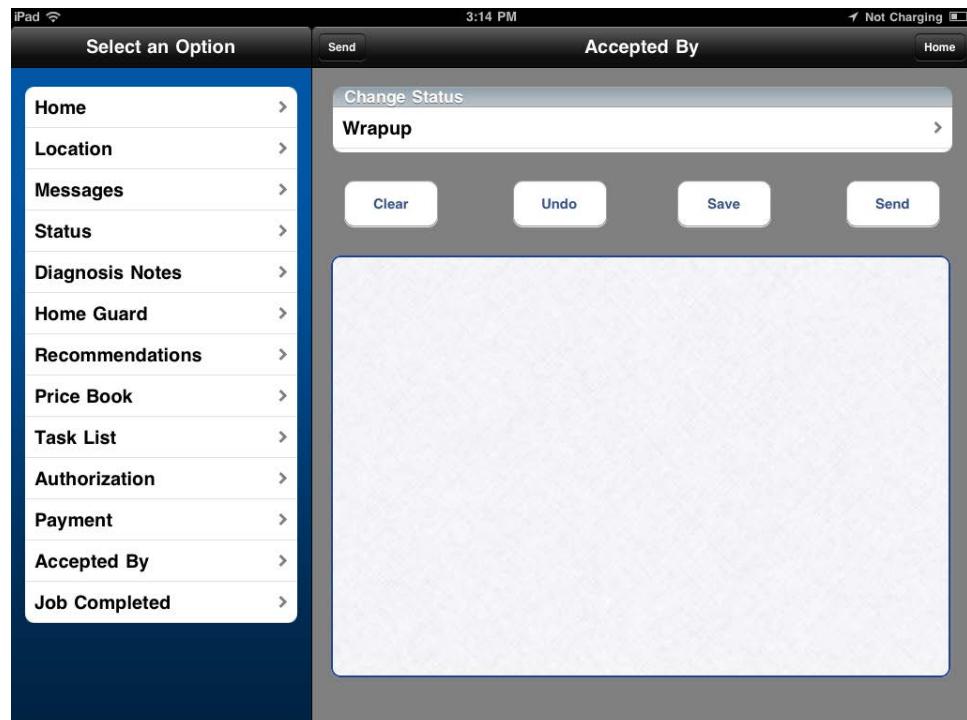
## 15.6 Honoring a Discount Coupon

To enter a coupon, simply touch the Coupon Button and the amount and enter the amount of the coupon, including dollars and cents. The iPad will calculate the difference. Once you have the coupon in you can continue with the payment.



## ACCEPTED BY

In order to begin completing the job you have the payment accepted.



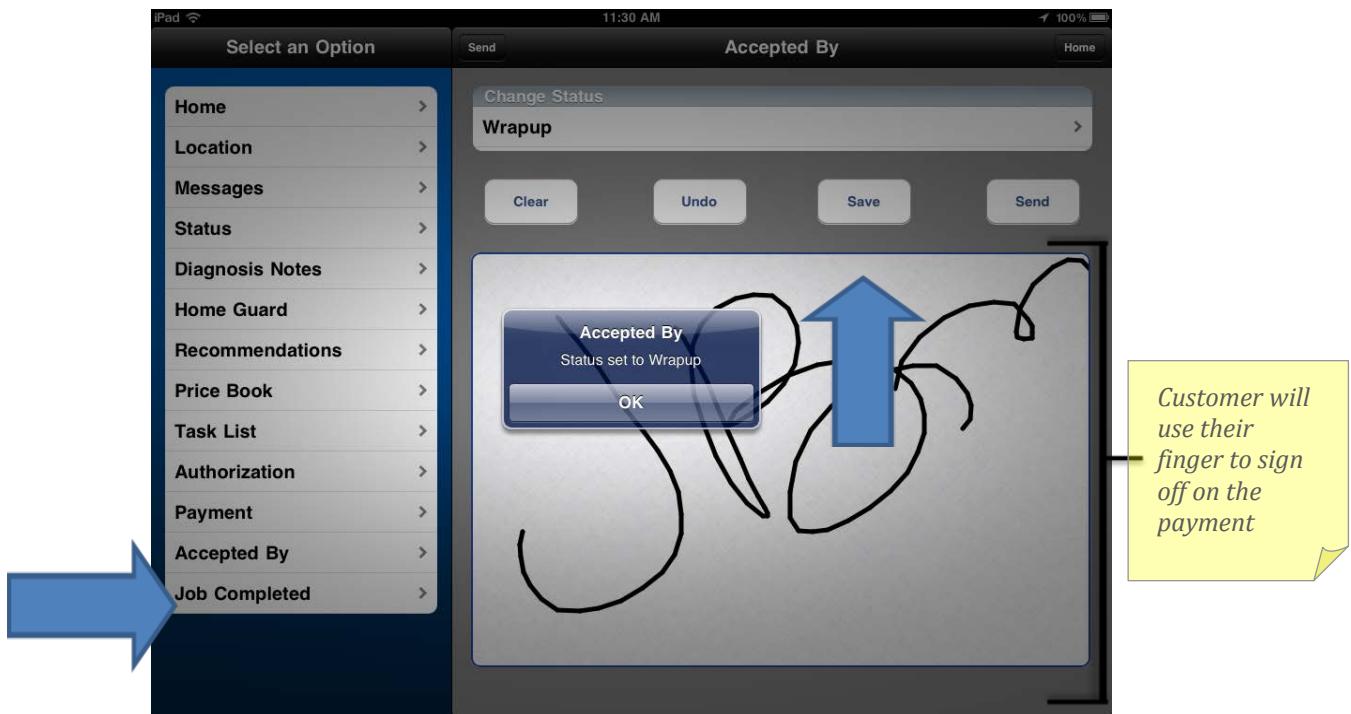
In this Chapter:

Keyboard Usage

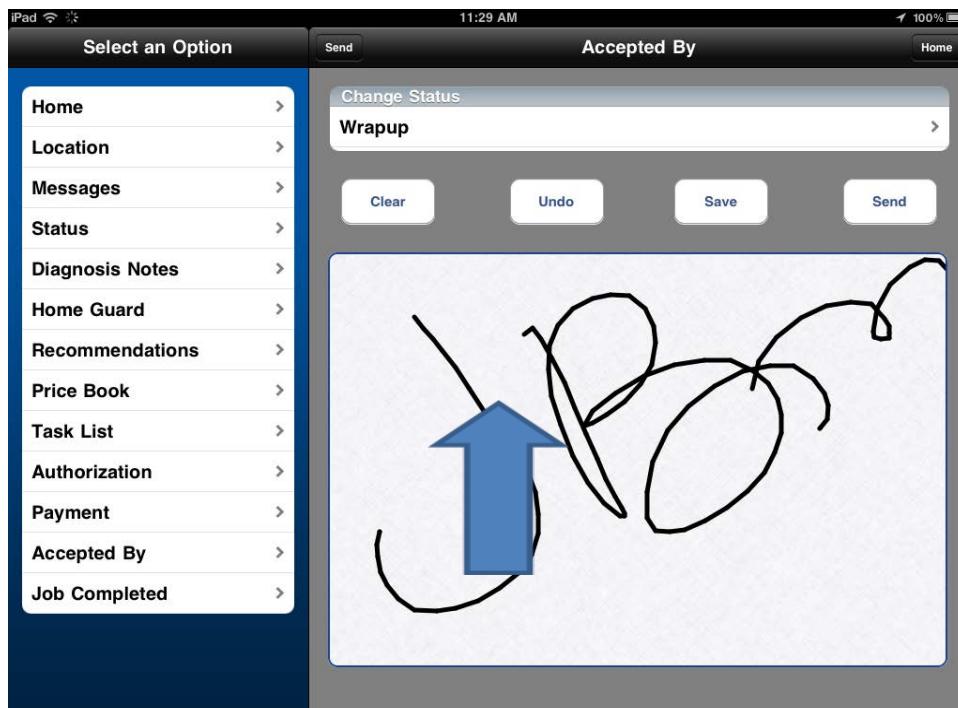
## 16.0 ACCEPTED BY

### 16.1 Completing Payment

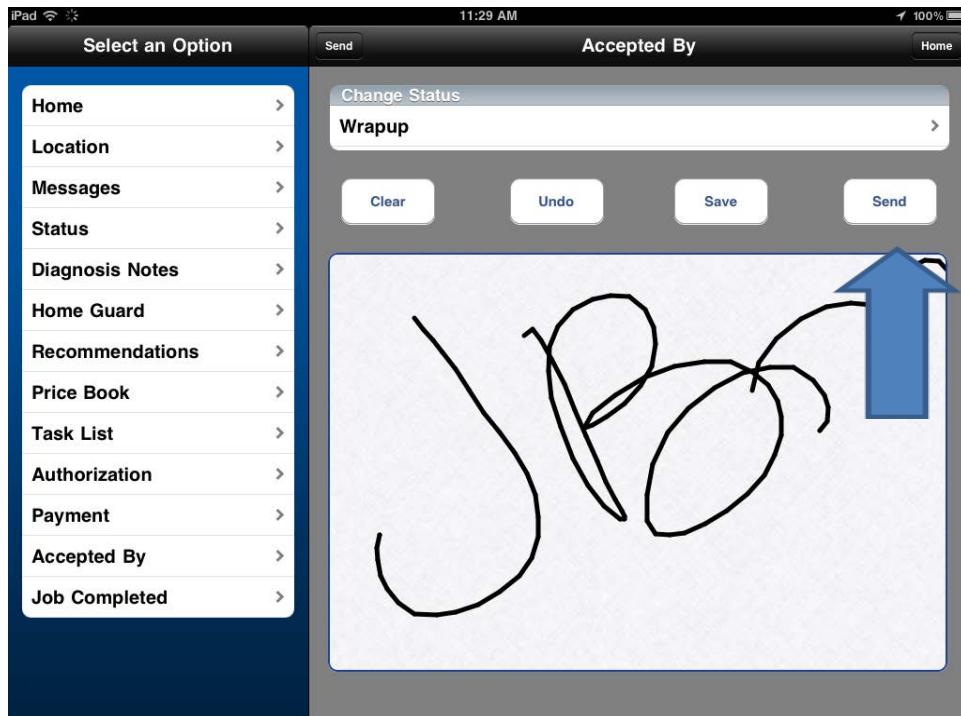
To complete payment touch the Accepted By Tab, have customer sign and then touch Save to capture the signature.



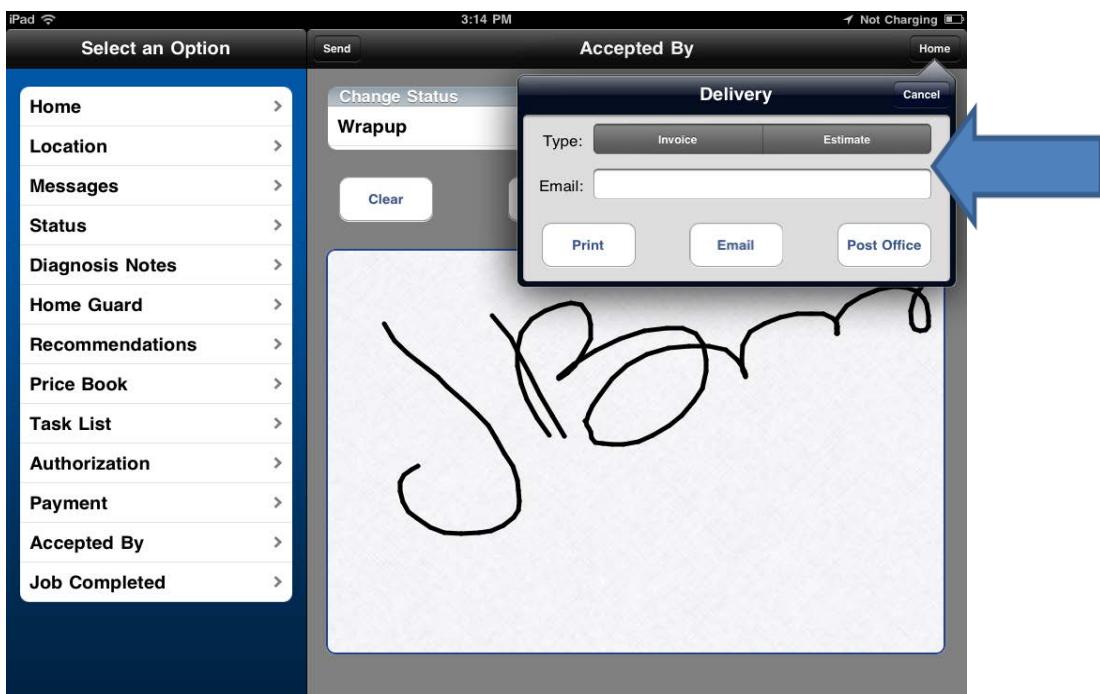
Once you touch the Save Button, and then touch OK to change your Status to Wrapup.



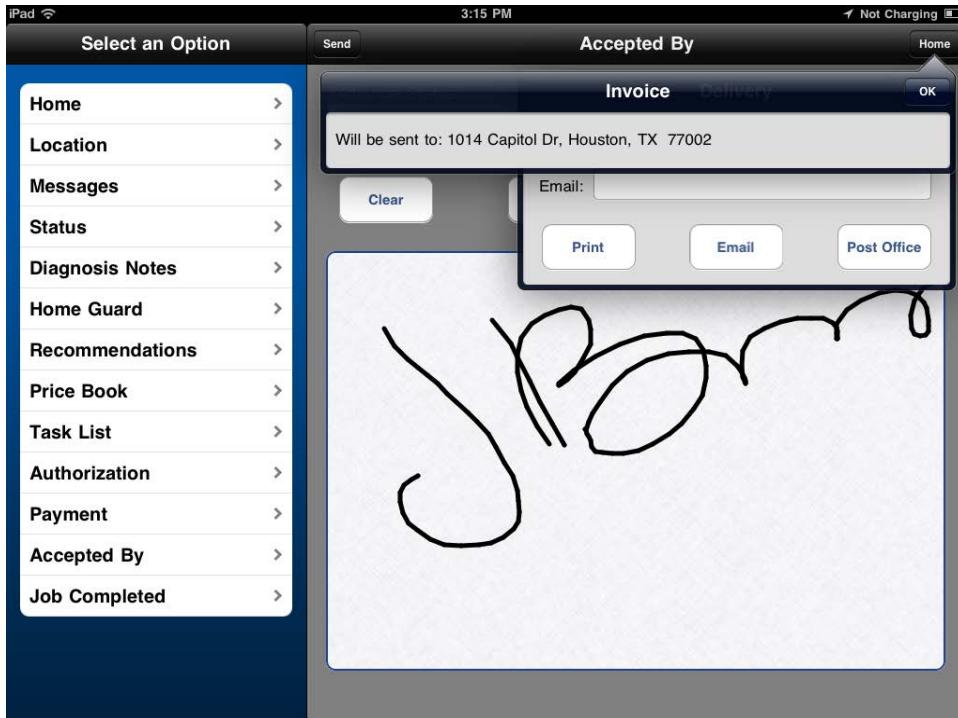
On the Accepted By Screen, you have the ability to send an estimate or invoice to the customer via standard mail. To send an invoice or estimate touch the Send Button



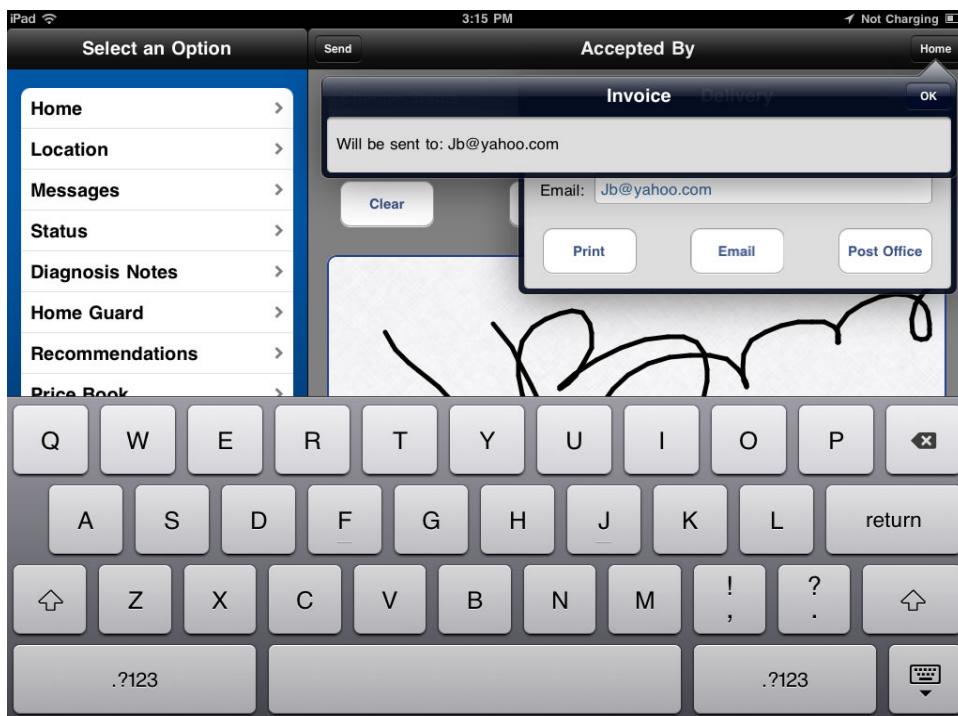
There are a few different options for sending invoices and estimates. If you have access to a printer you can print this. You can also email or mail this form the iPad. First you must determine what the customer wants to have sent to them. You can touch either the invoice or estimate Button.



If the customer wants this mailed to them touch the Post Office Button, confirm the address and then touch OK.

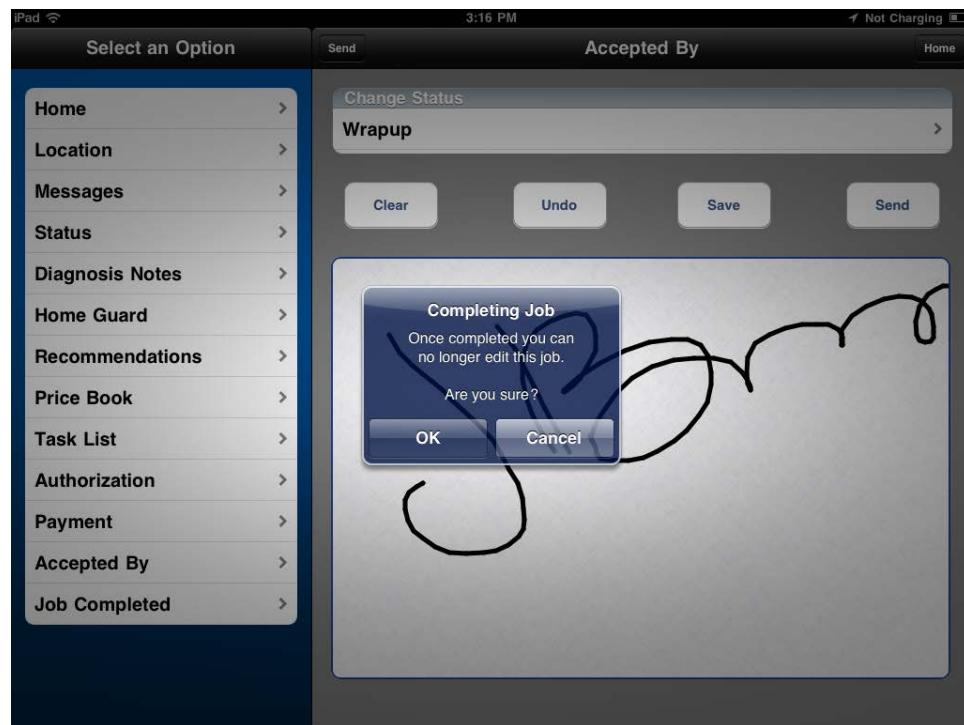


If the customer would rather have this emailed touch the Email Button, confirm the address and then touch OK. 



## Completing the Job

You have now successfully completed the job.



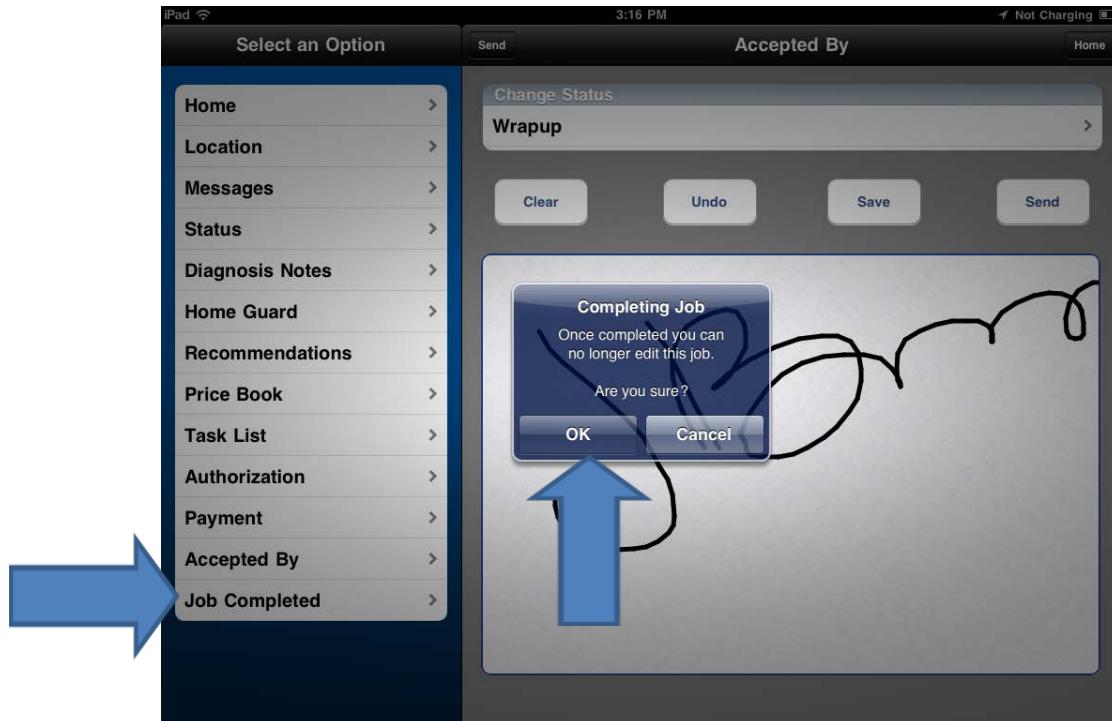
In this Chapter:

📁 Valuable Information

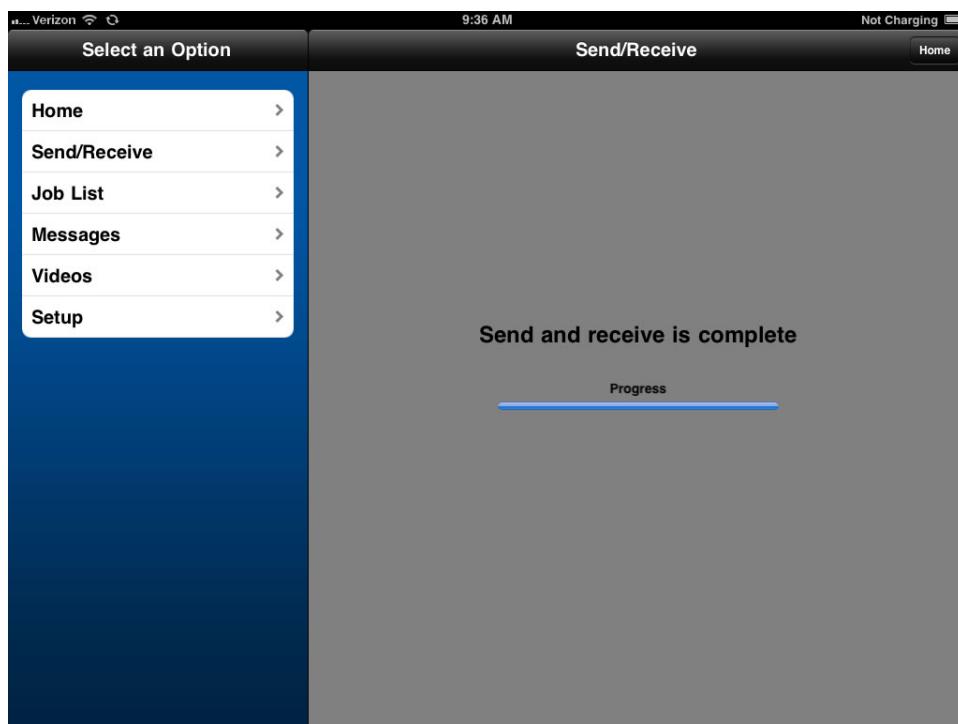
## 17.0 Job Complete



When the job has been completed and all signatures have been captured touch on the Job Completed Tab and then touch OK



Touching OK will automatically bring up the Send/Receive Screen that will send the job to the office and remove the job from the iPad. You are now ready to proceed to the next job.



## **Mobile Invoice Printing Setup Guide (Optional)**



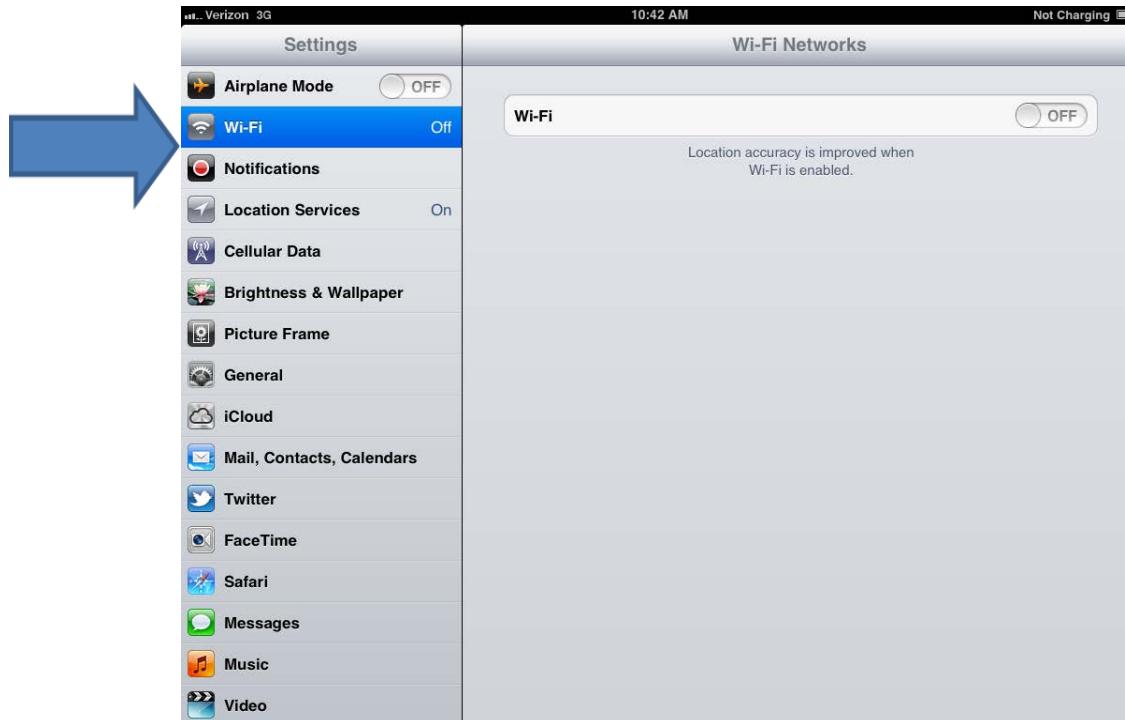
In this Chapter:

Valuable Information

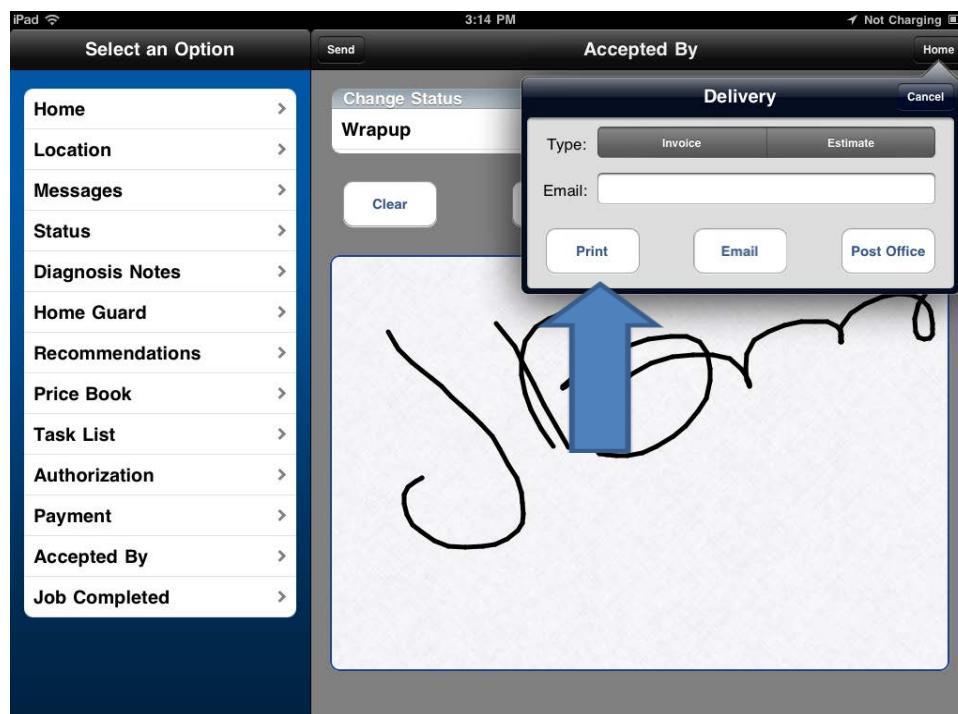
## 18.0 Mobile Invoice Printing Setup Guide



Turn on your iPad and connect to the wireless network you just setup. The iPad should automatically ask which network you want to connect to when turned on, however if it does not you can go to ‘Settings’ and then ‘Wi-Fi’. You can select the wireless network you setup from this menu.



When on the Accepted By Screen and you want to print to your wireless printer, touch the Print Button



When printing a document, select ‘Print’ from the print options:

The screenshot shows an iPad screen with a document titled "Invoice" from "Toilet Company". The document contains contact information for Les Thomas and a table of contents. A context menu is open, with the "Print" option highlighted by a blue arrow. A yellow smiley face icon is overlaid on the right side of the document.

Les Thomas  
1605 Region Ln.  
Houston TX 77002

Qty	Description	Unit Price	Total Price
1	Sloan Flush Valve Closet 110	\$209.54	\$209.54

Subtotal: \$209.54  
Tax: \$0.00  
Total: \$209.54

**Payments**

Balance Due: \$209.54

**Diagnostic Notes**

Then choose ‘Select Printer’ and then ‘HP Laserjet P1102w’. This will allow the iPad to print a document wirelessly. To finish printing, select ‘Print’ again.

The screenshot shows the same iPad screen with the "Printer Options" dialog box open. The dialog box has fields for "Printer" (set to "Select Printer >"), "Copies" (set to "1 Copy"), and a "Print" button. A yellow smiley face icon is overlaid on the right side of the document.

Les Thomas  
1605 Region Ln.  
Houston TX 77002

Qty	Description	Unit Price	Total Price
1	Sloan Flush Valve Closet 110	\$209.54	\$209.54

Subtotal: \$209.54  
Tax: \$0.00  
Total: \$209.54

**Payments**

Balance Due: \$209.54

**Diagnostic Notes**

**Remember**, it may take a few moments for your printer and router to startup when powered back on. If you do not see the printer immediately you may need to wait a few minutes. When powering down the system, be sure to turn off the printer using its power button before shutting off the power at the inverter.