

# Mobile Tracker

PROFIT RECOVERY PARTNERS, LLC.

CLIENT ADMINISTRATOR GUIDE: V1.2

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## Purpose

As workforces become increasingly mobile, it is common for companies to provide mobile devices to their employees. These devices allow employees to perform work-related functions, but are often also used for various personal reasons to varying degrees. In order to effectively manage mobile expenses, companies need to differentiate work-related charges from personal charges, and be reimbursed by the employees for personal charges applied on company devices and plans.

Profit Recovery Partners, LLC has developed a platform that allows clients to easily manage, control, and report on employee mobile device charges. The platform is called “Mobile Tracker.”

## Overview

Profit Recovery Partners obtains mobile carrier invoices for clients under applicable contract. This invoice data is then compared to various rules defined in Mobile Tracker. Ultimately, Mobile Tracker classifies the usage data to chargeback definitions to establish an amount of specific personal use charges per line per month. Mobile Tracker can generate and deliver a summary report of chargebacks to the company’s administrator, and can generate and deliver a line-specific report per user that defines the personal usage amounts for which the employee is responsible.

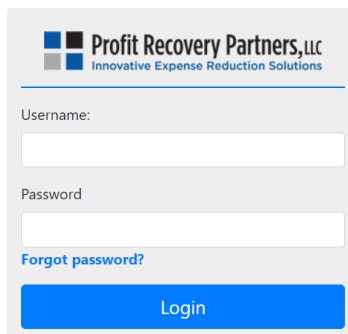
Clients use Mobile Tracker to:


1. Define which chargeback rules should apply to specific lines
2. Establish additional categories that can be used to group lines (Department, Line Type, Location)
3. Generate a Summary report containing chargeback totals for each applicable line
4. Approve the chargeback data for a given month
5. Deliver a Summary report to the company’s administrator (requires approval)
6. Deliver line-level reports to each user for which chargebacks apply (requires approval)
7. Retain historic reporting for prior months, both summary and line-level

## Accessing Mobile Tracker

Clients access Mobile Tracker from their PRP dashboards.

Log into your PRP dashboards at: <https://portal.prpllc.com/>, and enter your username and password.



 Profit Recovery Partners, LLC  
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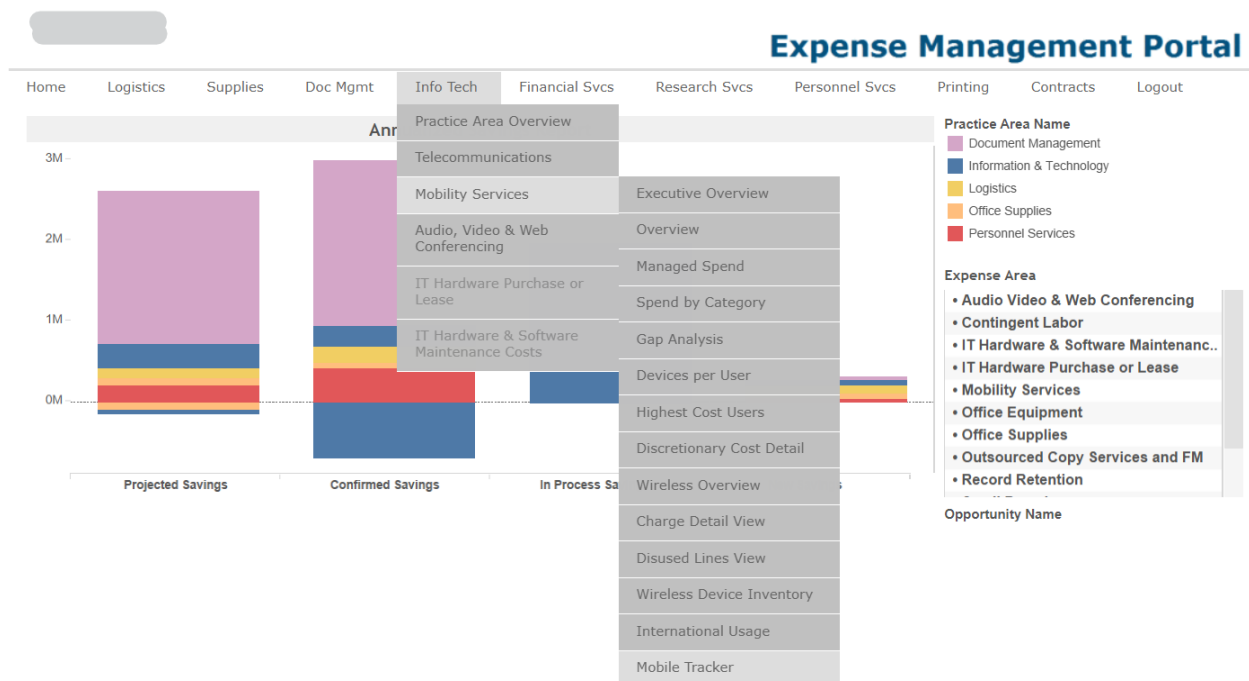
Username:

Password:

[Forgot password?](#)

Login

Once logged in, navigate to **Info Tech > Mobility Services > Mobile Tracker**



This opens the Mobile Tracker Home screen in a new tab in your browser.

The screenshot shows the 'Mobile Tracker' home screen. The top navigation bar includes links for Home, Manage (selected), Approve, Reports, and a notification bell. Below the navigation bar, the 'Wireless Lines' section is displayed. It includes a search bar and a table of wireless lines. The table has columns for Actions, Wireless Number, Account, Cost Center, User Name, User Email, User ID, Device Model, Device Type, Department, Line Type, Location, and Chargeback. The table contains 10 entries, showing details for various users and devices. A 'Quick Filter' dropdown is located at the bottom right of the table. The page footer indicates 'Showing 1 to 10 of 932 entries' and includes pagination controls (Previous, 1, 2, 3, 4, 5, 94, Next).

Actions	Wireless Number	Account	Cost Center	User Name	User Email	User ID	Device Model	Device Type	Department	Line Type	Location	Chargeback
			NYIT			NA	smartphone	Apple iPhone 8+		Partner	New York	No Charge
			NY08260			NA	smartphone	Apple iPhone 8			New York	International Charges
			NY12315			NA	smartphone	Apple iPhone 8				International Charges
			NY13517			NA	smartphone	Apple iPhone 8				International Charges
			NYLASUPP			NA	smartphone	APL iPhone 11 128GB		Non-Partner	New York	No Charge
			NYIT			NA	smartphone	APL IPHONE XR BLACK 128GB				No Charge
			NY11390			NA	smartphone	APL iPhone 11 128GB		Non-Partner	New York	International Charges
			NY11274			NA	smartphone	APL iPhone 11 128GB		Family-Personal	New York	All Charges
			NY09544			NA	smartphone	APL iPhone 11 PRO 256GB			New York	International Charges
			NY11643			NA	smartphone	APL IPHONE XR BLACK 128GB			New York	International Charges

## Home Screen

Mobile Tracker can be navigated using the primary navigation along the top of the screen.

The grid contains several column headings, or fields. Some fields are defined and populated by the mobile carrier and cannot be altered, while other fields may have their contents altered.

### Fields – Carrier Defined

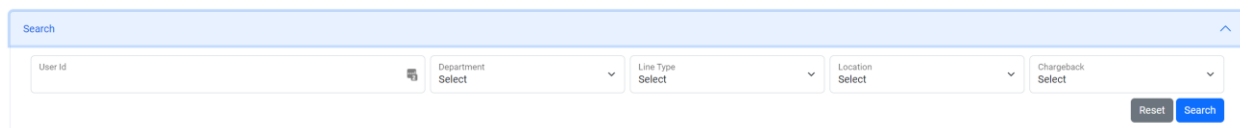
- Wireless Number – The phone number of the device
- Account – The account to which the line belongs
- Cost Center – The cost center to which the line belongs
- User Name – The user as defined with the mobile carrier
- User Email – The email address of the user as defined with the mobile carrier
- User ID – The user ID as defined with the mobile carrier
- Device Model – The model of the device
- Device Type – The device type as defined with the mobile carrier

### Fields – User Managed

- Department – The department, work unit, or team in which the employee works
- Line Type – A general classification for assignment of the device.
  - Examples: Personal, Partner, Family, etc.
- Location – A region, city, or other geographic classification
- Chargeback – They category of charges that should are reimbursed by the employee

### Search

For a more refined search, click the Search link to expose the Search tool

A search tool interface with a light blue header bar labeled "Search" and a small upward arrow icon on the right. Below the header is a white search area containing five input fields: "User Id" (text input), "Department" (dropdown menu with "Select" text), "Line Type" (dropdown menu with "Select" text), "Location" (dropdown menu with "Select" text), and "Chargeback" (dropdown menu with "Select" text). To the right of these fields are two buttons: a grey "Reset" button and a blue "Search" button.

### Quick Filter

To quickly search for any values in any fields, use the Quick Filter tool.

A "Quick Filter" tool consisting of a small black funnel icon to the left of a white rectangular input box with the text "Quick Filter" inside.

### Sorting

All rows can be sorted by any column in either ascending or descending order. Simply click on the Sort

icon to sort by column.

### Pagination

By default, the grid will display 10 entries per page. This can be increased according to the number of rows desired. Choices are 10, 25, 50, 100 entries per page.

A pagination control showing the text "Show" followed by a dropdown menu currently set to "10" with a downward arrow, and the text "entries" to the right.

## Updating Lines

Each line can be selected, and the following information updated: Department, Line Type, Location, Chargeback.

To update a line, select the row containing the line and click the Update button.



This opens the Update Line dialog.

Select any values to change and click Save. To clear a value so that it is blank, chose “Select X” where X is the field.

Under Chargeback, you can select a chargeback group or All Charges. If All Charges is selected, the employee will be responsible for all expenses included in the invoice for a given line. Chargeback groups are discussed later in this document.

## Updating Multiple Lines

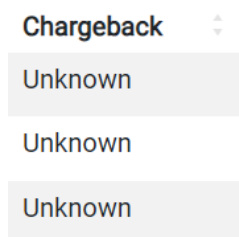
To update multiple lines, click the export button to download wireless line show in the grid. After the file has finished downloading, open and update the following information: Department, Line Type, Location, and Chargeback.



After the file has been updated, click the Import button and Drag & Drop the file in the drop zone or browse to the file for import.

## Unknown Chargeback

When new lines are added to a plan and are included in an invoice, they are imported into Mobile Tracker without a chargeback. However, in order to identify these independently as new lines, the system labels them as “Unknown.”

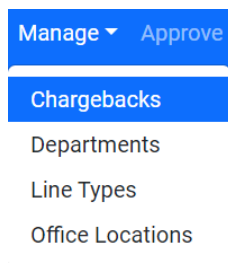


It is essential for the company’s administrator to define these unknown chargebacks prior to monthly reporting. They can be cleared of any charges by selecting “No Charge.” Alternatively, they can be updated with a chargeback group, or All Charges.

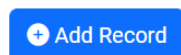
## Managing Chargebacks

The term “Chargeback” is used to describe the grouping of various types of mobile and device charges that should be extended to the device user for reimbursement to the company.

Chargeback groupings can be added, updated, or deleted under the Manage Chargebacks menu item.



To Add, click the desired button.



To View, Update, or Delete a Chargeback grouping, select the row containing the chargeback, and click the desired button.



In order to delete a chargeback, there must be no existing lines to which that chargeback is assigned. The lines can be edited in the Home screen to remove the chargeback.

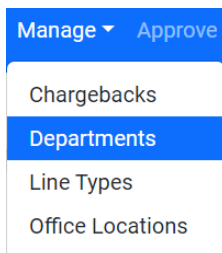
**PLEASE NOTE:** Individual charge types assigned to a Chargeback grouping are designated by Profit Recovery Partners personnel. For example, the Chargeback grouping of “International Charges” may contain several mappings, including International Data, International Messages, and International Voice. While the name of the chargeback can be created and edited by the client, and subsequently assigned to

lines, the mappings of the specific charge types must be edited by PRP. Please contact your account representative for assistance in setting up your Chargeback mappings.

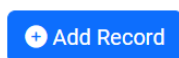
Once the chargeback is saved, it will be available for selection in the Home screen. (See “[Updating Lines](#)”)

## Departments

Departments can be added, updated, and deleted under the Manage Departments menu item.



To Add, click the desired button.



To View, Update, or Delete a Chargeback grouping, select the row containing the chargeback, and click the desired button.

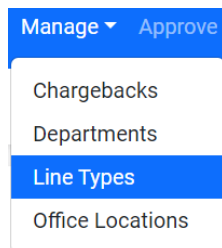


In order to delete a department, there must be no existing lines to which that department is assigned. The lines can be edited in the Home screen to remove the department.

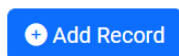
Once the chargeback is saved, it will be available for selection in the Home screen. (See “[Updating Lines](#)”)

## Line Types

Line Types can be added, updated, and deleted under the Manage Line Types menu item.



To Add, click the desired button.





To View, Update, or Delete a Chargeback grouping, select the row containing the chargeback, and click the desired button.

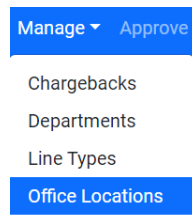


In order to delete a line type, there must be no existing lines to which that line type is assigned. The lines can be edited in the Home screen to remove the line type.

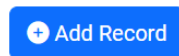
Once the line type is saved, it will be available for selection in the Home screen. (See “[Updating Lines](#)”)

## Office Locations

Office Locations can be added, updated, and deleted under the Manage Office Locations menu item.



To Add, click the desired button.



To View, Update, or Delete a Chargeback grouping, select the row containing the chargeback, and click the desired button.

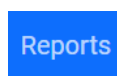


In order to delete a location, there must be no existing lines to which that location is assigned. The lines can be edited in the Home screen to remove the location.

Once the office location is saved, it will be available for selection in the Home screen. (See “[Updating Lines](#)”)

## Reports

To access reports, click the Reports menu item.



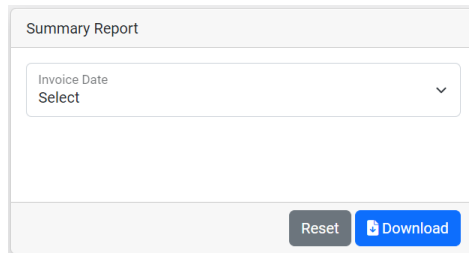
The Mobile Tracker system generates two types of reports:

- **Summary Report:** A report showing all cumulative chargebacks per each line for a specified invoice month.
- **Line Report:** A report showing all chargebacks per line broken down by vendor charge type for a specified invoice month.

Either report can be generated from The Reports screen.

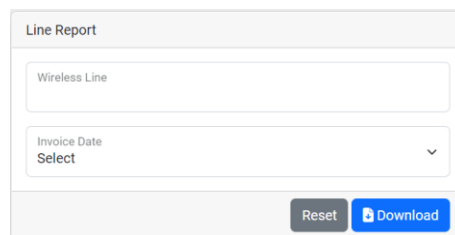
## Summary Report

To download the Summary Report, select the appropriate Invoice Date and click Download:

A screenshot of a web form titled "Summary Report". It features a dropdown menu labeled "Invoice Date" with the word "Select" and a downward arrow. At the bottom right, there are two buttons: a grey "Reset" button and a blue "Download" button with a document icon.

## Line Report

To download the Line Report, enter the applicable wireless number, select the appropriate Invoice Date, and click Download.

A screenshot of a web form titled "Line Report". It has two input fields: "Wireless Line" and "Invoice Date" (with a dropdown arrow and the word "Select"). At the bottom right, there are two buttons: a grey "Reset" button and a blue "Download" button with a document icon.

Old reports are stored and can be downloaded at any time by selecting the prior invoice date.

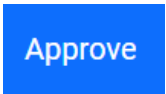
## Approval Process

Invoice data is imported, and prepared in Mobile Tracker on or closely after the 15th of each month for the prior month's invoices.

The system is designed to email the summary report to the company's administrator, and all line reports to each user. However, the system **WILL NOT** send these emails until approval is received from the administrator.

The administrator must log into Mobile Tracker after the 15th of the month and approve the prior month's data. The administrator can review the summary report or any line reports prior to approval. If a problem is found, please contact your PRP account representative for assistance.

To approve the monthly data, and send the summary and line emails, click the Summary Approval menu item.

A blue rectangular button with the word "Approve" in white text.

In the row with the correct Invoice Date to be approved, check the Approved Invoice Data box to indicate that the Mobile Tracker data for the invoice month is approved.

The system will then email the summary and line reports.

Note: Emails will not be immediately delivered. Please allow 1-3 hours from the time of approval until receipt of the emails.

## Support

PRP is ready and able to assist with any trouble you may have with Mobile Tracker. For assistance, please contact your PRP Account Representative.

