

Going Mobile – WorkTrack’s Smartphone App



WorkTrack has a browser interface for managers and dispatchers as well as a mobile app for field technicians out in the field. Mobile options include smart phones, tablets, laptops, and the ability to receive alerts and new work through email and text. This flexibility means you can standardize one mobile device across your entire fleet or mix and match to meet your workforce’s individual needs.

WorkTrack Mobile App

Your service technicians have the option to log into WorkTrack from a laptop and web-browser, but most subscribers prefer to download WorkTrack’s mobile app directly onto their Smartphones for the increased portability, GPS enabled location routing, and signature capture capabilities. The mobile app for WorkTrack works on Apple and Android phones, tablets, and earlier versions of Blackberry and Windows phones. Each device platform currently offers slightly different functionality in overall feature capabilities. Review the table below to select a device best suited for your individual and overall team needs. WorkTrack is carrier-neutral, so if one tech prefers an iPad from AT&T and the other tech prefers a Blackberry from Verizon: No problem! Once signed up with WorkTrack, just download and install the appropriate app onto your device, and then log-in with your specific user credentials.

Mobile Device Functionality on WorkTrack

| | iPhone | Android | BlackBerry | Windows V5,6,6.5 |
|--|--------|---------|------------|------------------|
| Receive work order alerts via mobile app | YES | YES | YES | YES |
| Process work orders | YES | YES | YES | YES |
| Process Service Agreement work orders (add-on) | YES | YES | YES | YES |
| Technician Timecard Tracking (add-on) | YES | YES | YES | YES |
| View work order details | YES | YES | YES | YES |
| View and add Work Order notes | YES | YES | YES | YES |
| View and add Work Order photos | YES | YES | YES | YES |
| GPS location tracking –Routing and Work Order Validation | YES | YES | YES | YES |
| Driving directions (links to devices mapping tools) | YES | YES | YES | YES |
| View Submitted Invoices | YES | YES | YES | YES |
| Capture electronic signatures (for work orders and invoices) | YES | YES | YES | YES |
| See work orders where I am a helper | YES | YES | YES | YES |
| See and manage work assigned to others (team work) | YES | YES | YES | YES |
| Re-Assign Work Orders | YES | YES | YES | YES |
| Work Order History Search | YES | YES | YES | YES |
| Create a copy of a Work Order | YES | YES | YES | YES |
| Create a New Customer and Accept Assigned Work | 2013 | 2013 | YES | YES |

Credit Card Processing

WorkTrack comes with seamless integration with “QuickBooks Merchant Services”. To activate this for your team, call Intuit @ (877) 212-6771. Seamless integration means you can use WorkTrack’s mobile app to create an invoice for the work order because the system automatically calculates the tax and shows the invoice total. You can manually enter in the card info and we’ll process the transaction, get the payment authorization, and then send the invoice from the field into the QuickBooks marked ‘Paid’.

At this time WorkTrack’s mobile app uses a Bluetooth connection to card swipes with built-in receipt printers, but these currently only operate with older mobile devices such as Blackberries and Windows Mobile (5, 6, and 6.5). If you want to process credit cards via card swipe, please use these older devices. You can also use www.GoPayments.com, however, the invoice will need to be manually associated with the payment inside QuickBooks because there is currently no integration between GoPayments and WorkTrack at this time.

| Supported Card Swipe/Receipt Printers |
|--|
| Zebra (4" wide paper) RW420 |
| Citizen Systems (2" wide paper) CMP-10BT-USM |

Printing in the Field

WorkTrack is designed to help your business capture information electronically and go paperless. However, WorkTrack can print work orders and invoices via the browser interface and payment receipts can be printed from Blackberry and Windows (V5, 6, 6.5) via supported Bluetooth card swipe/printer units (detailed above). You can also email work order documents and receipts directly to your customer from our mobile app – and let the customer print them, if necessary.



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