

Gold Service

Engineers Instruction Manual

Version 0.1
25th January 2020

Contents

Overview of the Gold Service Mobile App.....	4
What does this document contain?	4
The screens within the App.....	5
The Log-in Screen.....	5
The Home Screen	6
The Main Menu	7
Week Summary View.....	8
Tabs within the Job.....	9
Description Tab.....	9
Job Story Tab.....	10
Customer Tab	11
Signature Tab	12
Using the App.....	13
How to log time on a job in the App.....	13
Dictating the Story Feature.....	14
How to refresh the screen in the App	15
How to manually upload items to the Portal	16
Settings in the App	17
Clear data button	17
Settings for uploading items	18
Dial phone numbers from the App	19
Favourites Menu.....	20
Add images to jobs	21

Parts Feature App Overview	22
Allocate stock to a job on the App	23
Mark parts as collected on the App	24
Mark parts as used on a job in the App	24
Mark parts as returned on a job in the App.....	26
Completing jobs with outstanding parts in the App	27

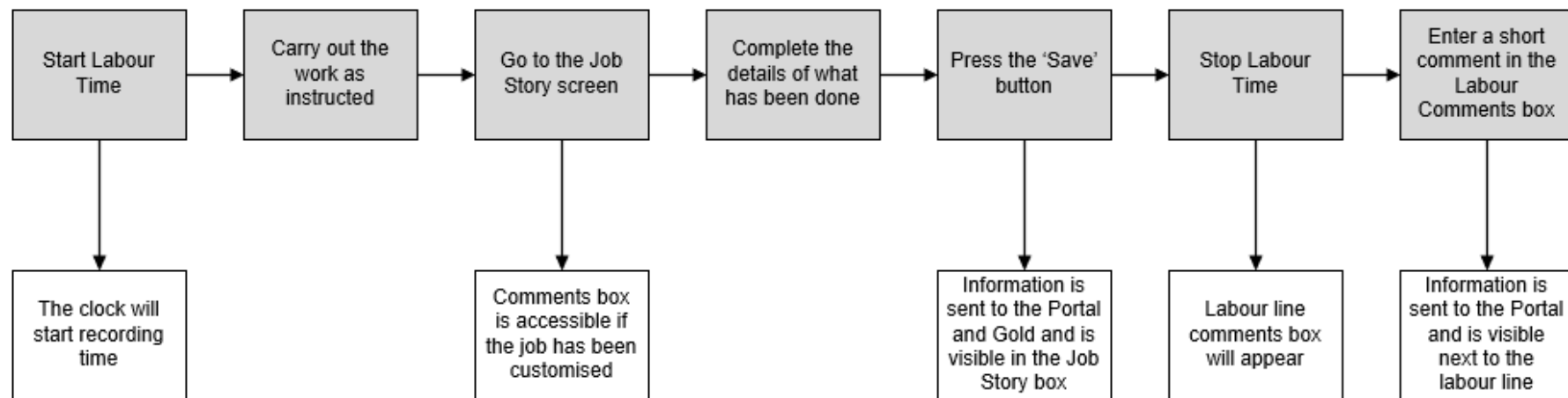
Overview of the Gold Service Mobile App

Essentially, the Gold Service Mobile App is used by the engineers to log time against a job and write stories about the work they have carried out. This information is then fed back to the Web Portal for the managers to view, amend and approve as necessary.

The App also contains other features which can be accessed if you are licenced for Gold Service 2.0. These include:

- Dialling phone numbers from the App
- Add images to a job
- Add jobs to a 'Favourite' menu
- Collect, use and return parts on a job

The following diagrams show the process the engineers should follow when using the Gold Service Mobile App:



What does this document contain?

This document is intended to be used as a training manual for all users of the Gold Service Mobile App, and it contains screen shots and process instructions for each element of the product.

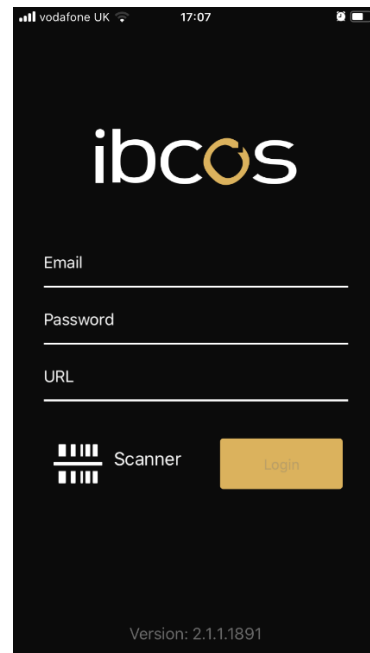
You can also find lots of short training videos on the Gold Service Page, which can be found in the Customer Portal of the Ibcos Website.

The screens within the App

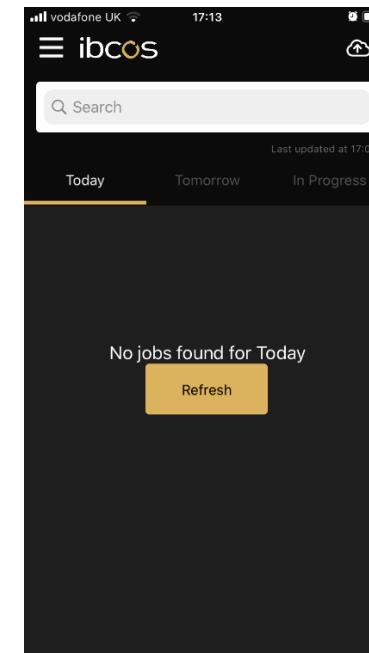
The Log-in Screen

The first step is the log in screen. You will need to enter your email, password and specific URL credentials to enter the Gold Service Mobile App. Once these have been entered, you will see the home screen.

The Log-in Screen



The Home Screen



Did you know?

If the Gold Service Mobile App is inactive for a week or more, it will automatically log you out and you will have to enter your log in credentials again to gain access.

The Home Screen

The Home Screen is the first screen you will see when you log into the App. This screen has various functionalities within it:

Search Bar

The search bar allows you to search for a job using criteria such as job number, customer name, date etc.

Today / Tomorrow / In Progress Tabs

At the top of the screen underneath the search bar, you will see 3 tabs:

- Today Tab: Shows all the jobs scheduled for that engineer for today
- Tomorrow Tab: Shows all the jobs scheduled for that engineer for tomorrow
- In Progress Tab: Shows all jobs that an engineer has logged time against but not yet completed

To move through these tabs, simply click on the one you want. The orange bar under the title denotes which tab you are currently on.

Last updated Time and Date

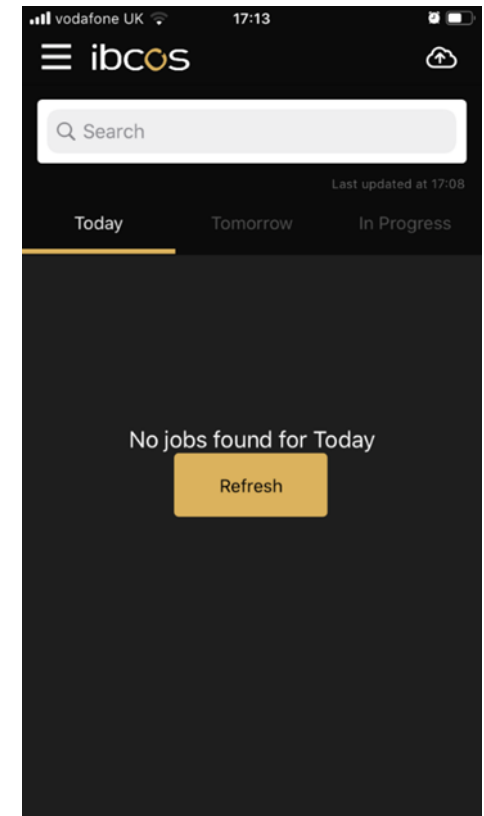
You must refresh your screens on the Gold Service Mobile App to receive any changes or additions that have been made to your jobs. Whenever you refresh the screen, the date and time will of when this action was carried out will show at the top right of the screen (underneath the search bar).

Manual Upload Cloud

Any data that has not managed to reach the Portal will be visible in the cloud icon on the App. Simply click on it, and it will list all jobs which require a manual upload. It is recommended that you do this as a matter of course at the end of every day.

Main Menu

The 3 lines at the top left-hand side of the screen will open the main menu. More information on this is shown in The Main Menu section



The Main Menu

In the Home screen of the App you will see a menu icon at the top left of the screen. Click on this icon to open the Main Menu. Here you will see:

Jobs Section:

Your Jobs: takes you back to the home screen

Favourite Jobs: Shows jobs marked as favourite (Gold Service 2 users only)

Week Summary: Shows a summary of the time logged for that week

More detail on the favourite jobs and week summary screens are provided in this manual

Parts Section: (Gold Service 2 users only)

Collection: Shows parts allocated to specific jobs which need to be collected

Stock: Shows a list of stock allocated to that engineer to use when necessary

More information on the Parts feature is provided in this manual

System Section:

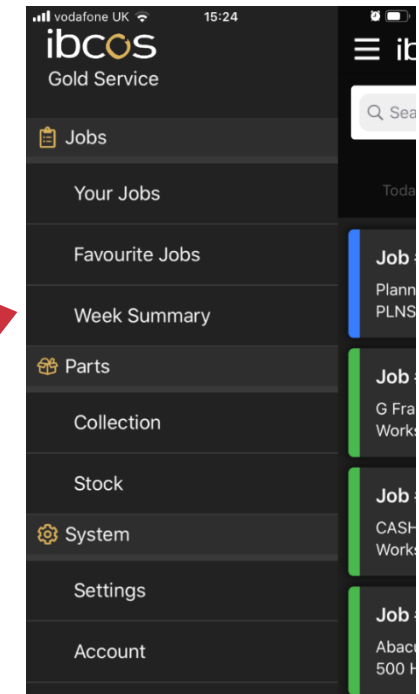
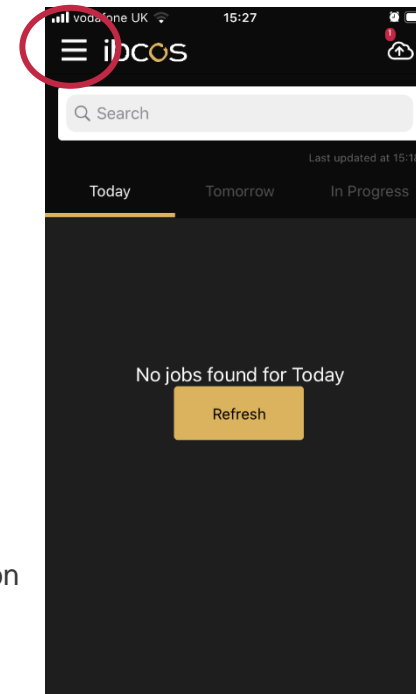
Settings: Shows systems settings for that phone and Mobile App

Account: Shows account details for that phone and Mobile App

Diagnostics: Shows App version, Device Manufacturer and Model and OS version

Log Out:

If you need to log out of the App you can do so via the main menu

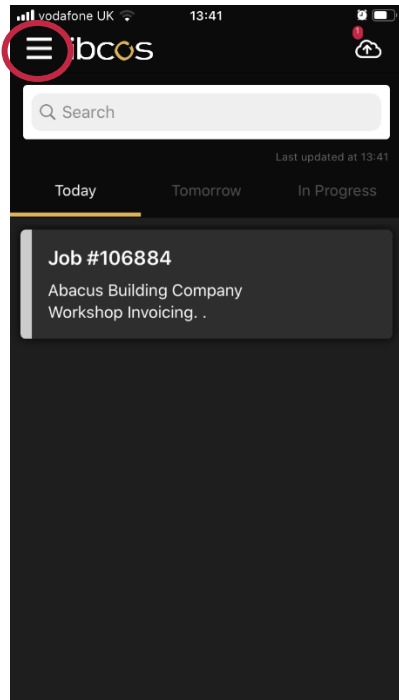


Did you know?

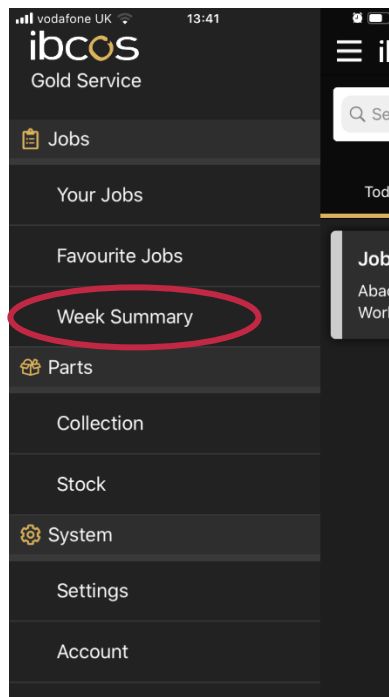
The main menu can only be accessed from the Home screen of the Mobile App.

Week Summary View

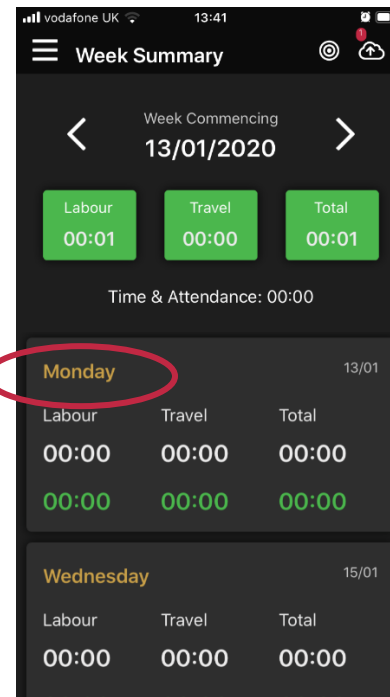
In the Main Menu of the App, you will see the 'Week Summary' option. If you click on this, it will open a new screen which displays all labour and travel time you have recorded for that week.



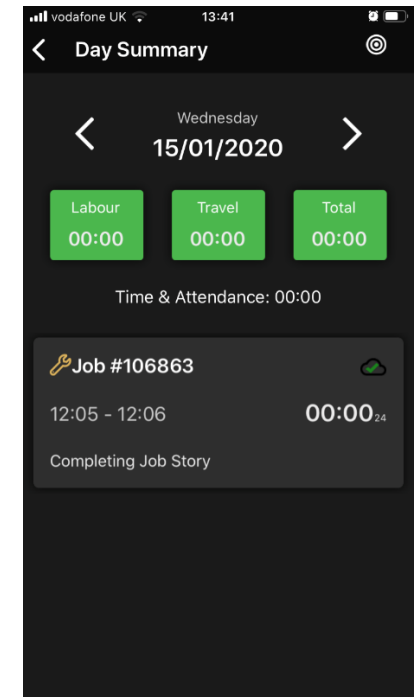
On the home screen, click the three lines at the top left of the screen to open the main menu



Click on 'Week Summary'. This opens a new screen showing all labour or travel logged for that week



If you want to see details of the jobs that you logged time against for that day, click on it



A new screen opens and you will see all the jobs that you logged time against on that day



Did you know?

You can change the week that you are viewing by using the arrows located next to the week commencing date.

Tabs within the Job

Description Tab

The Description screen is the first screen the engineer will see when they open a job in the App. It contains:

Description of the job

This screen will show a brief description of the job (for example: Workshop Invoicing).

Job Instructions

The instructions for this job will be visible on this screen.

Wholegood Number

The Wholegood number is populated from the information in Gold. This field cannot be edited in the App

Wholegood

The name of the Wholegood is number is populated from the information in Gold and cannot be edited in the App. If it is not entered in Gold, this field will be blank.

Registration Number

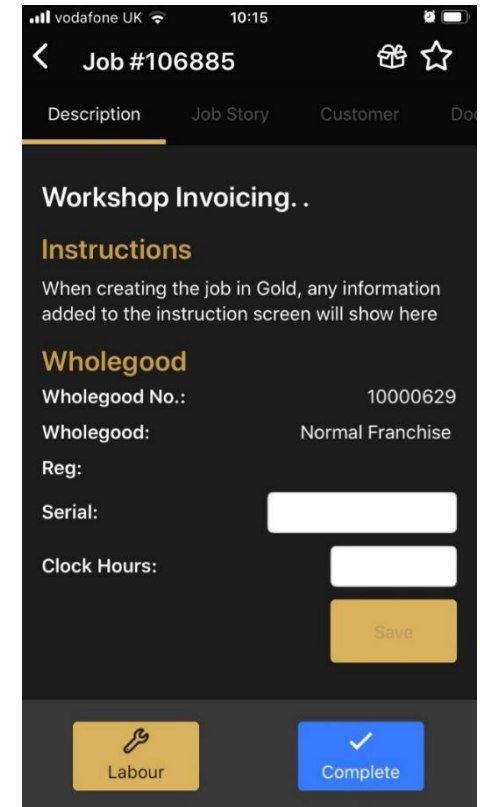
The registration number is populated from the information in Gold and cannot be edited in the App. If it is not entered in Gold, this field will be blank.

Serial Number

The Serial Number field is a blank text box where you can manually enter the machines serial number. This information will show in the Wholegood Tab of the Portal when the job has been completed.

Clock Hours

The Clock Hours field is a blank text box where the you can manually enter the machines clock hours. This information will show in the Wholegood Tab of the Portal when the job has been completed.



Did you know?

When You open a job, you will see various tabs at the top of the screen. You can scroll through the different screens by swiping left and right, or you can scroll across the tabs at the top and click on the one you want.

Job Story Tab

The Job Story is the second tab of the job. The screen is split into 2 sections: 'Job Story' and 'My Story'.

Job Story

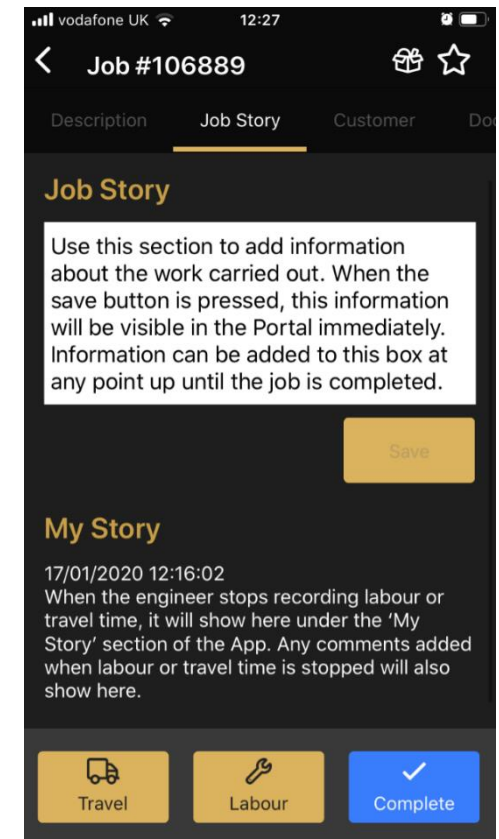
The job story box is a blank text box where you can write information about the work you have carried out on the job. As soon as you enter the information and press the save button, the data will be visible in the 'Job Story' tab on the Portal.

Please Note: This box will only appear if the customisable job story has been utilised when creating the job in Gold. If this feature has not been utilised, you will not be able to enter information into the text box until the job has been completed. Speak to your manager about customisable job stories.

My Story

The 'My Story' section captures all labour and travel time that you have recorded on the App, as well as any comments added when you stopped recording time.

This information will appear in the Job Tab of the Portal as soon as the engineer has completed the job.



Did you know?

Instead of typing the information into the Job Story section, you can 'dictate' it by speaking into the phone. Instructions on how to do this can be found in this manual under the 'Dictating the Story' section.

Customer Tab

The Customer Screen is the third tab of the job. This screen contains customer details such as:

Account Number

Shows the customer's account number. The information is populated from Gold and you cannot edit it.

Account Name

Shows the name of the customer. The information is populated from Gold and you cannot edit it.

Contact Name

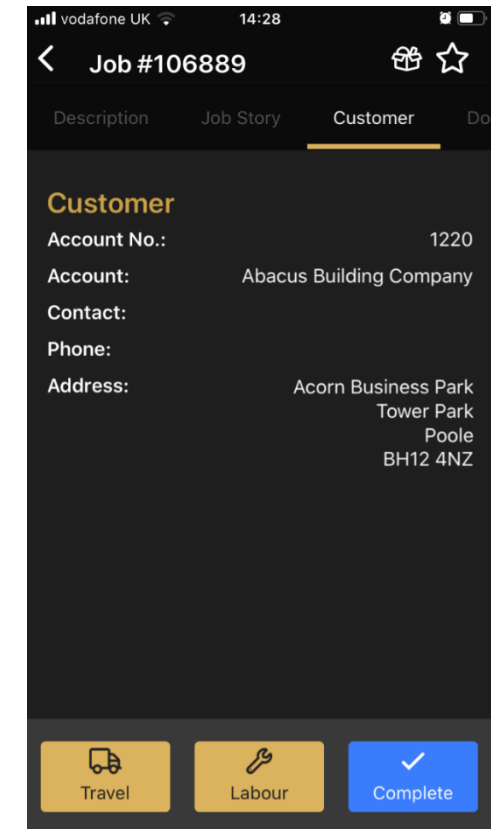
Shows the name of the person you must speak to when on site. This information is populated from Gold and you cannot edit it.

Customer Phone Number

Shows the customer's phone number. This information is populated from Gold and you cannot edit it.

Customer Address

Shows the location of the customer and where you should go to visit the site. This information is populated from Gold and you cannot edit it.

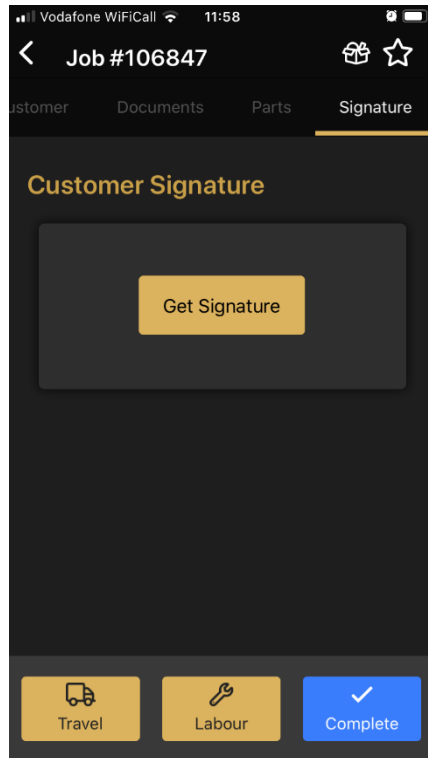


Did you know?

If you are a Gold Service 2 user, you can take advantage our feature which enables you to dial the customer phone number directly from the App. More information on this feature is shown in this manual.

Signature Tab

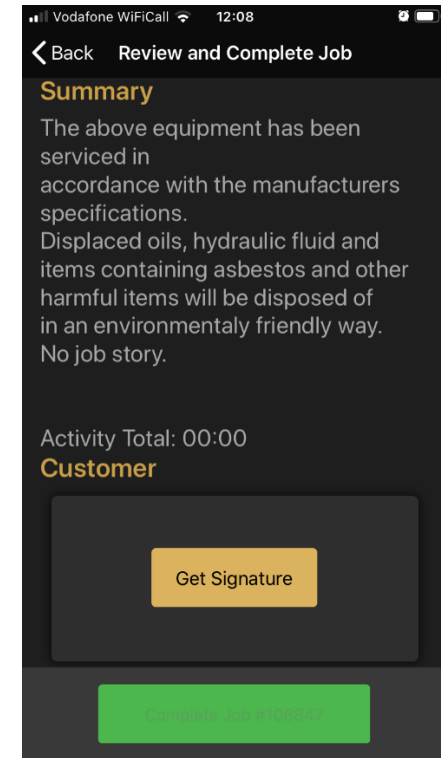
The signature screen allows you to capture the customers signature where necessary. This is especially useful for jobs relating to Warranty.



On the signature tab, there will be a 'Get Signature' button. Pressing this will open a new screen with a space for the customer to sign.



Using their finger, the customer can sign their name. When the signature has been captured, press the 'Accept' button.

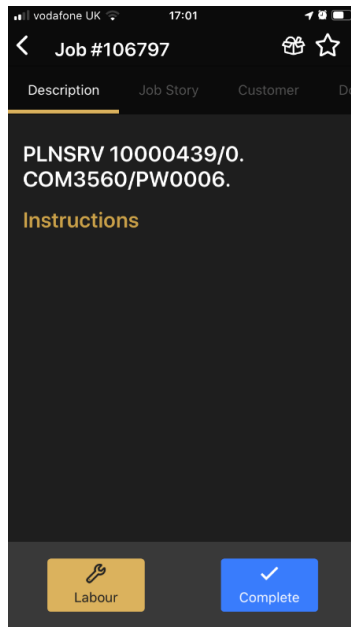


If you try to complete the job without having obtained the customers signature, you will be prompted to do so on the summary screen.

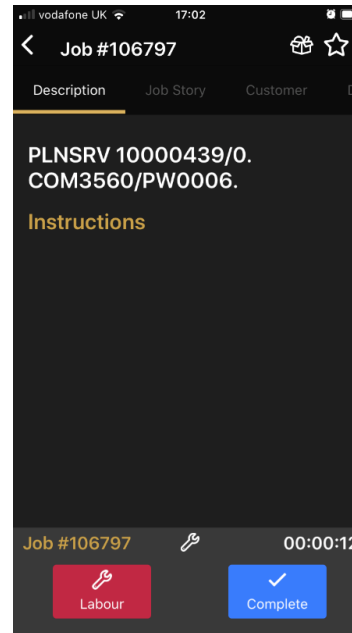
Using the App

How to log time on a job in the App

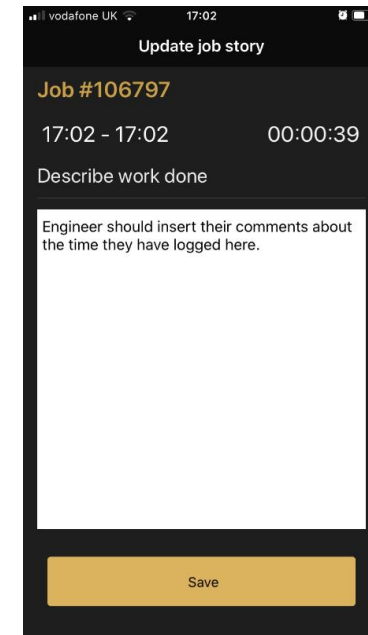
You can log time on a job in the App to show how long you have taken for each activity. This information is then fed back to the portal for the manager to approve. Any comments you log against the time recorded will also show in the portal.



To start logging time in the app, press the 'Labour' button. The labour button will appear on every screen within the app and can be used at any time.



Time will begin recording in the bottom right hand side of the screen. When time is being logged, the labour button turns red. To stop logging time, press the labour button again.



A labour comments box appears to allow you to provide information about the time you have logged. Press the save button for this information to reach the portal.

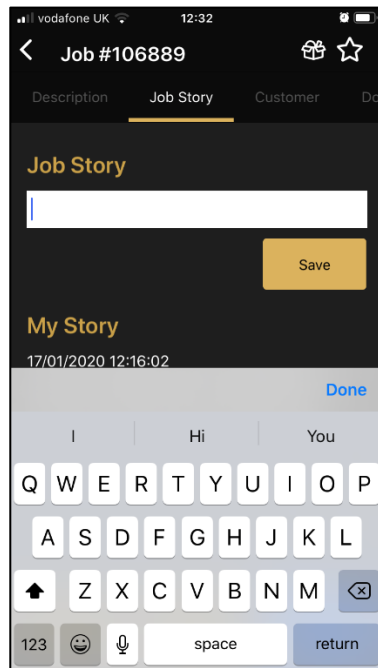


Did you know?

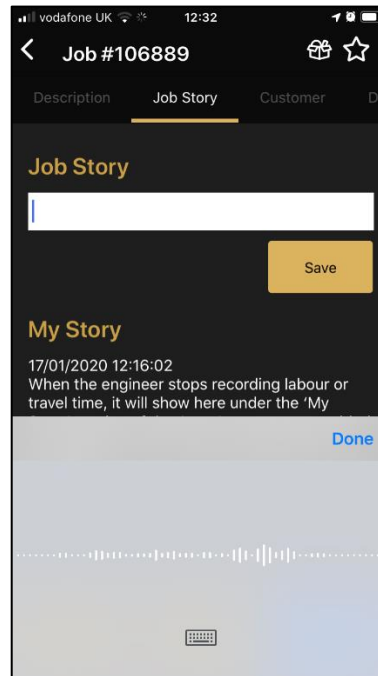
The labour comments should be used to provide information about the time logged – for example, if you forget to log off of a job, you can add the correct end time to these comments.

Dictating the Story Feature

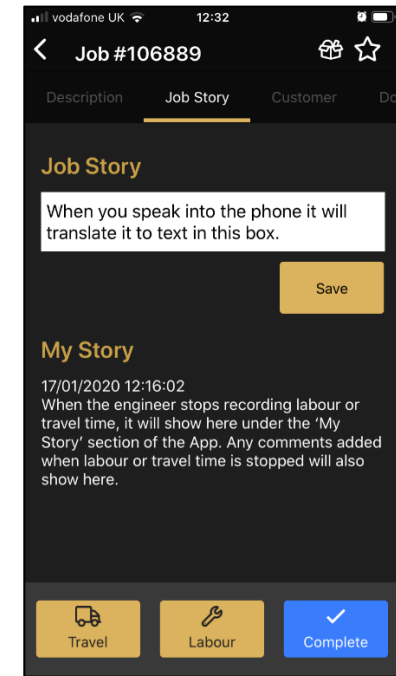
When adding information to the job story in the App, you can use the 'dictation' feature. This allows you to speak into the microphone, and it will automatically populate the information into the story box, meaning you don't have to type the story in. (The Job Story box can only be used during the job if the customisable job story has been utilised when creating the job in Gold. If not, this box will not be accessible until the job is completed. More information on the Customisable Job Story feature can be found in this manual).



Click in the job story box to make the keyboard appear. From here, click on the microphone icon



Soundwaves will appear on the screen to show it is recording. Press the 'Done' button when finished



The text you have recorded will then appear in the Job Story box. Click the 'Save' button to save it



Did you know?

To use the Dictate Feature, the microphone will have to be enabled on your phone. You can enable it via your settings.

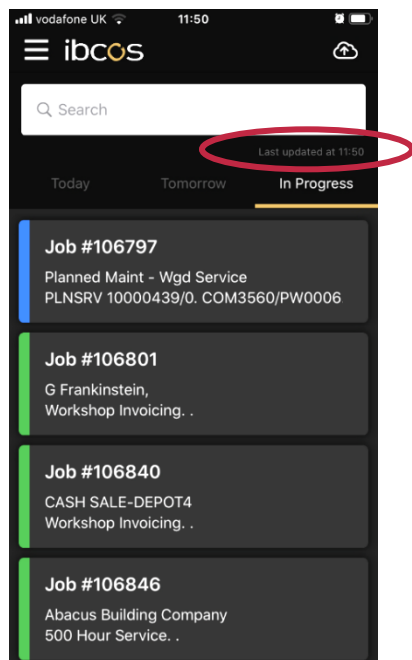
How to refresh the screen in the App

You must refresh your screens in the App to receive any changes or additions that have been made to your jobs. To help monitor this, we have provided visibility of the last date and time the App was refreshed.

This information is visible in 2 areas: The home page of the job (which is visible to both Gold Service and Gold Service 2.0 users), and the parts tab in the job (which is visible to only Gold Service 2.0 users). In both areas, the information can be found in the top right-hand corner of the screens (beneath the search bar).

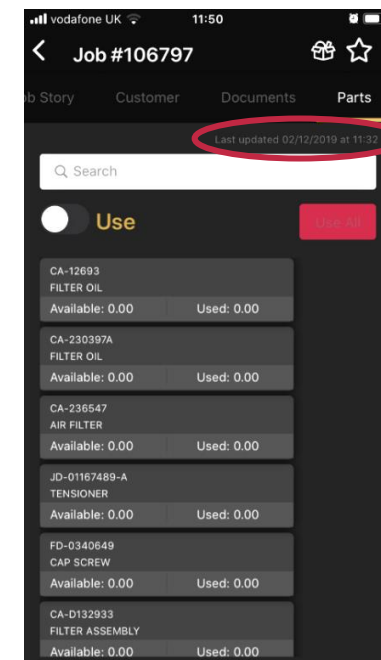
The home page of the job

visible to both Gold Service and Gold Service 2.0 users



The Parts tab in the job

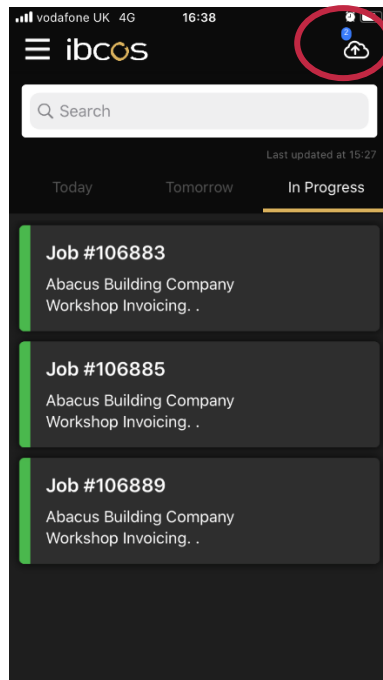
Only visible to Gold Service 2.0 users



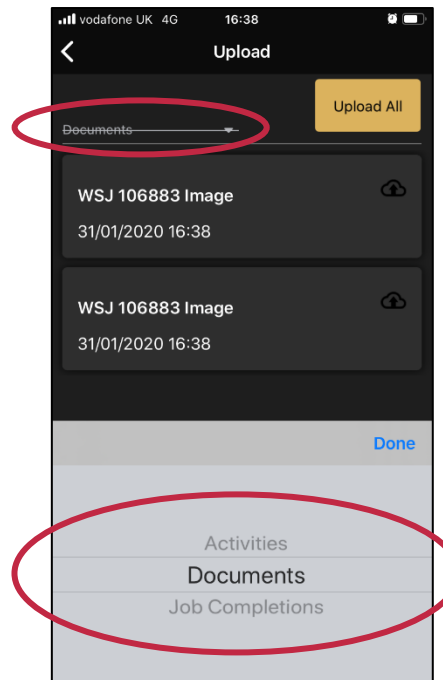
There are two ways you can refresh the screen. If they are in the home screen and have no jobs in your lists, you will see a 'refresh' button. Clicking this will refresh the screen. (If there are jobs in your list, this button will not be visible). Alternatively, in any screen on the App, you can 'pull down' on the screen to refresh it. Whenever you refresh the screen on the app, the 'last updated' information will be updated.

How to manually upload items to the Portal

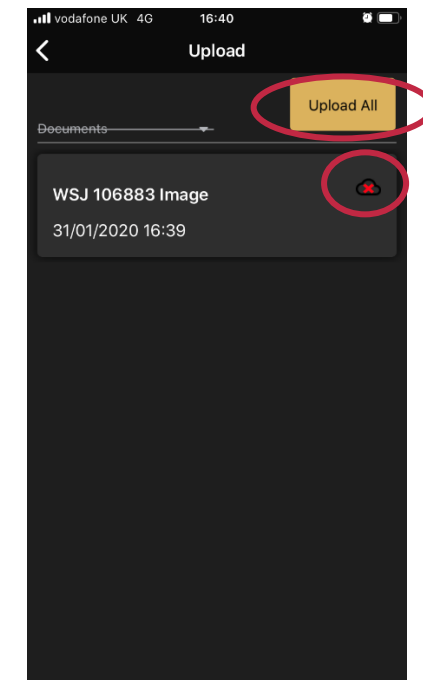
Activities and documents will automatically be sent to the Portal from the App. However, for various reasons this doesn't always happen. We strongly advise that you check your manual uploads folder at least once a day to ensure any data which has not reached the Portal is sent.



You will see a 'cloud' icon at the top right-hand side of the screen. Click on this to open your uploads folder. Here you will see all the items that have failed to reach the Portal.



This is split into 3 areas, Activities, Documents and Job Completions. You have to go into each area to upload the items as it will only upload them for the category you are in.



You can upload items individually by pressing the cloud button next to the item you want to upload. Or you can upload them all at once by using the 'Upload All' button.



Did you know?

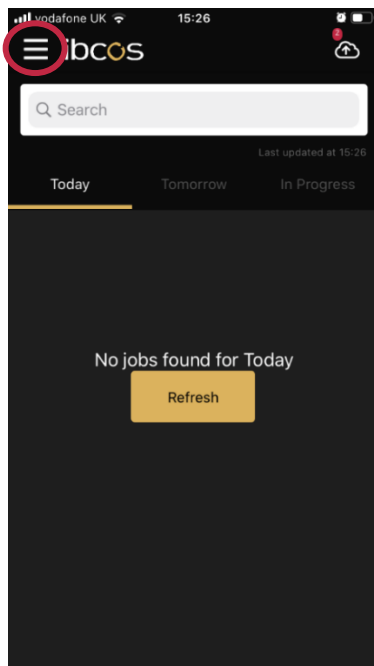
Items from the Activities and Documents category must be uploaded, and Job Completion last. If items from the Job Completion category are uploaded first, it will close the job off in the Portal and any activities or documents associated with that job cannot be uploaded.

Settings in the App

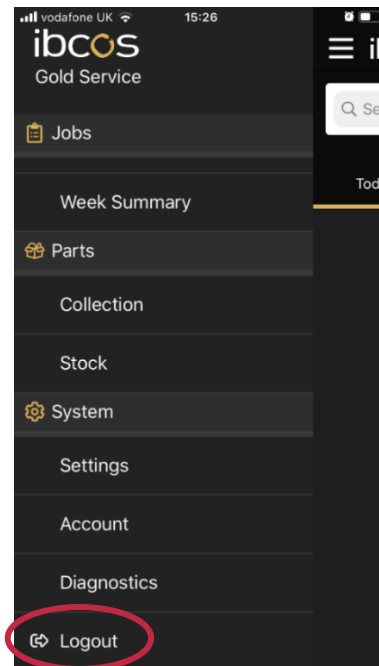
Clear data button

Gold Service 2.0 now comes with a 'Clear Data' button, which allows you to clear any user created data whilst still retaining your log in credentials (such as your email and password etc). This can be used if you are experiencing issues with the App. This should only be used when the App is not active, and no time is being logged.

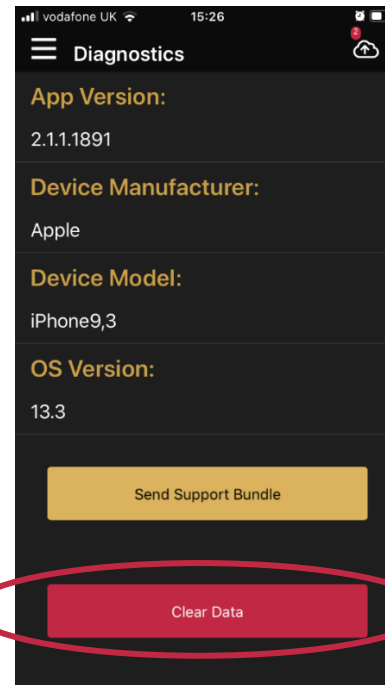
You must upload any outstanding data using the cloud icon to the top right-hand side of the screen, before you use the clear data function.



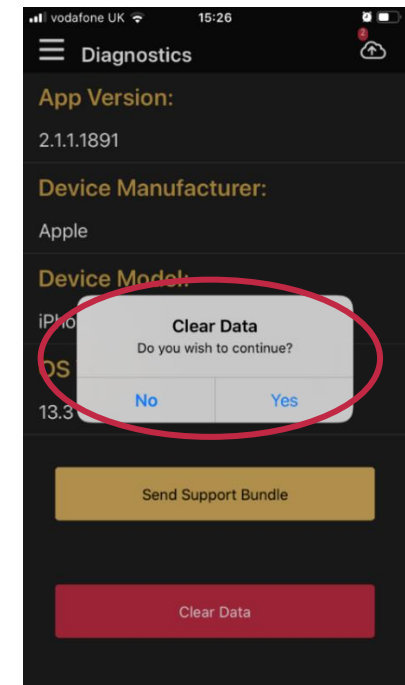
In the homescreen of the App, click on the main menu at the top left-hand side of the screen



This opens the main menu. Go to 'Diagnostics' which can be found under the System section



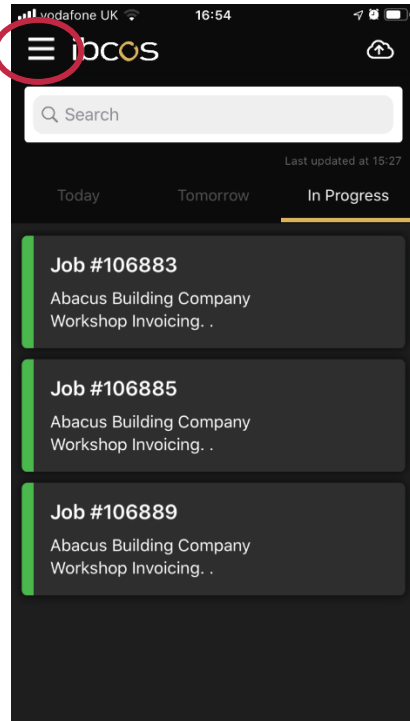
Here you will see the details of the App. The 'Clear Data' button can be found at the bottom of the screen



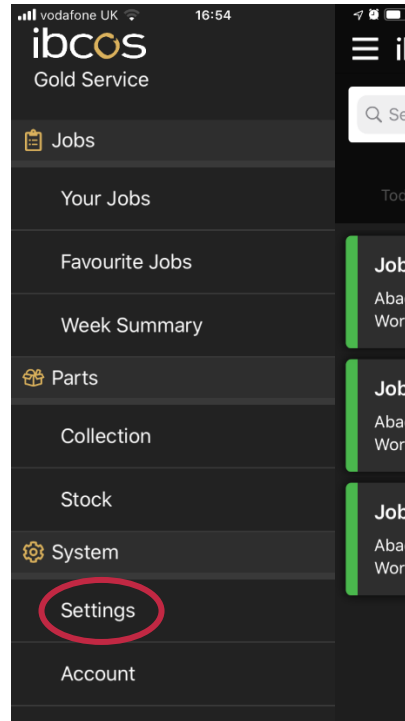
Click the button and you will be asked if you want to clear the data. Click yes to clear it, and no to exit

Settings for uploading items

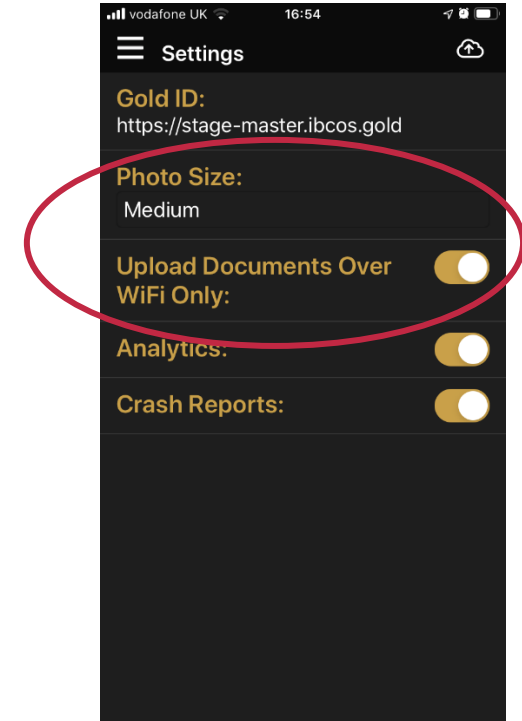
You can choose your settings for uploading items in the App. For example: you can choose to upload over WiFi only to save your data, and you can choose the size of the photos you send.



In the Home Screen of the App, open the Main menu



From here, click on the Settings Option to open the settings page



You can choose to upload documents over WiFi, and select the size of the photos

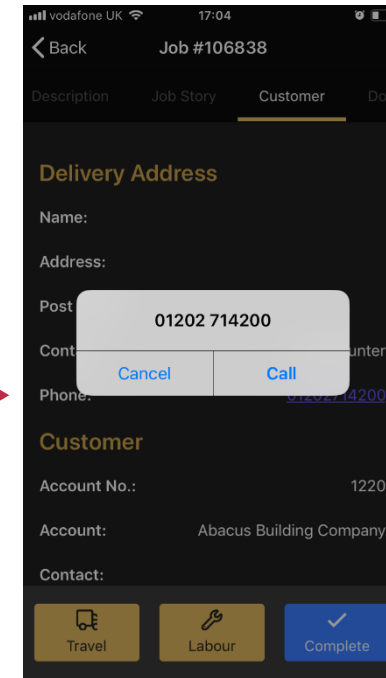
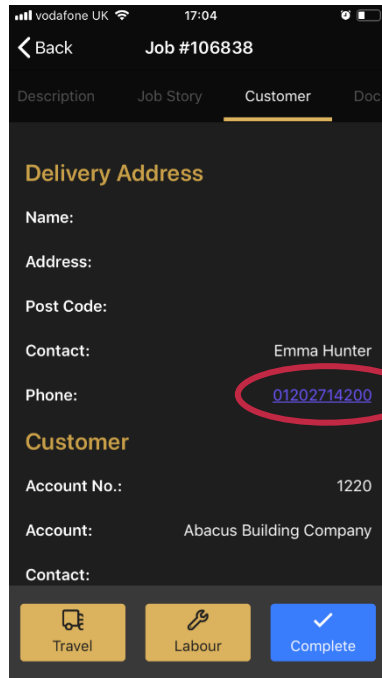


Did you know?

If you choose to send documents over WiFi only instead of using your data, items will only reach the Portal when you have a WiFi connection.

Dial phone numbers from the App

If you are a Gold Service 2.0 user, you can dial phone numbers from within the App using the contact number found in the customer screen. If the number is showing as blue and underlined, it means you can click on it to open the call function



In the customer tab, click on the phone number to open the link

Press call and this will dial the phone number.

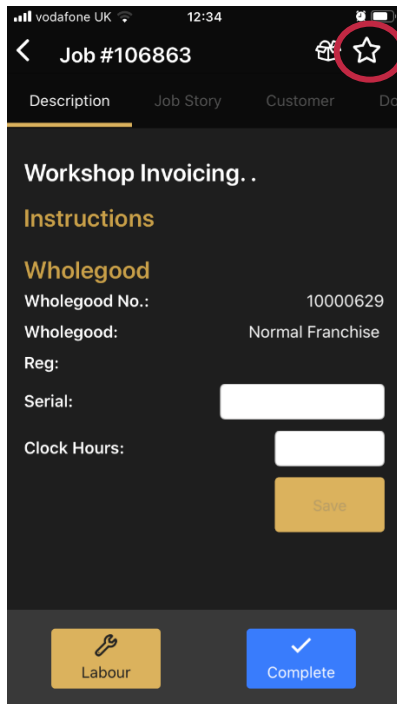


Did you know?

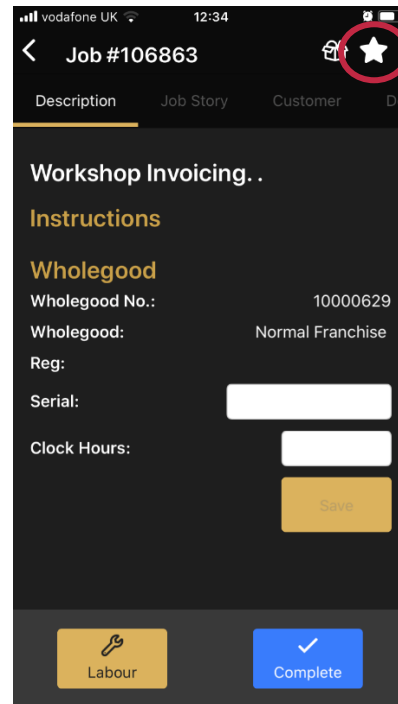
If text is added next to a number, this feature will not work. The phone number must contain only numerical values for the link to be effective. If the number is not blue and underlined, speak to your manager

Favourites Menu

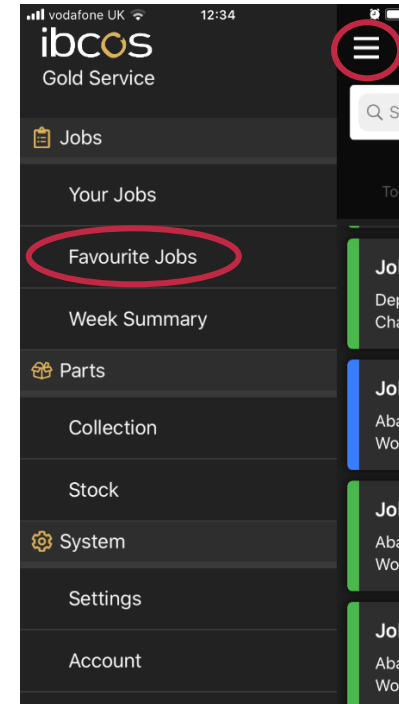
You can now mark jobs as 'favourites', which will add them to your favourite jobs folder. This feature has been designed to reduce the need to search for jobs that are no longer visible on your today or tomorrow screens. The process to add jobs to your favourites folder is simple:



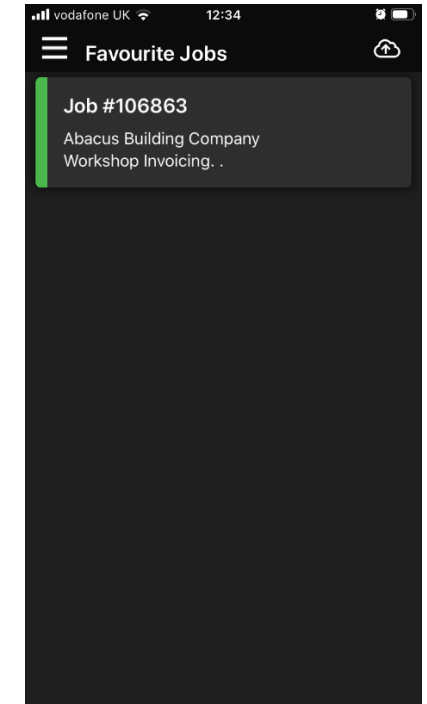
Open the job you want to add to the favourite job menu. There will be a star in the top of the screen.



Click on it and It will turn white. This means that the job has now been added to the favourite jobs folder.



Go to the home screen and click on the menu at the top of the screen. You will see the favourite jobs folder.



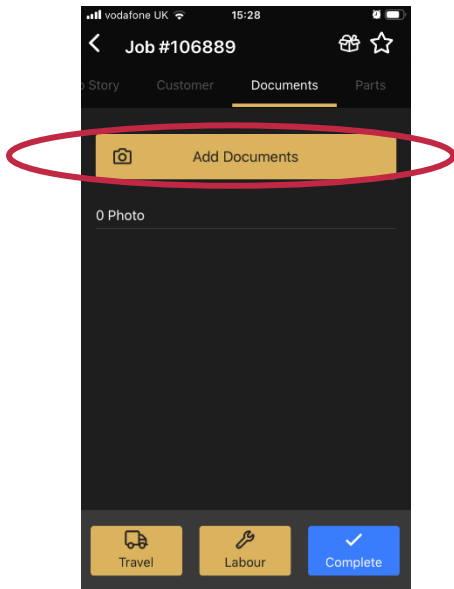
In this folder will be a list all of jobs marked as 'favourite'. Open the jobs by clicking on them.



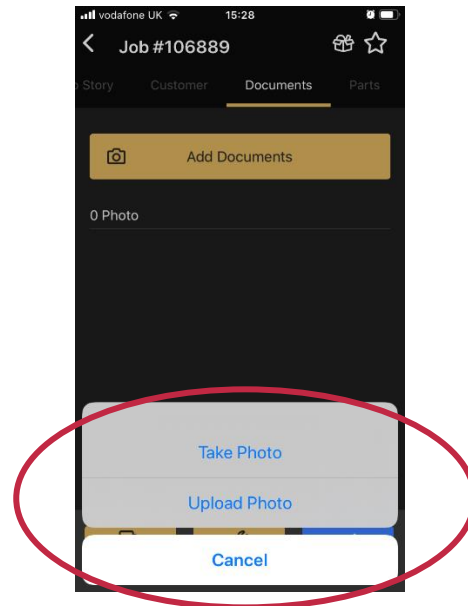
Did you know?

To remove a job from the favourite job menu, simply open the job, and click on the star again. When it turns black with a white outline, it will have been removed from your favourites list.

Add images to jobs



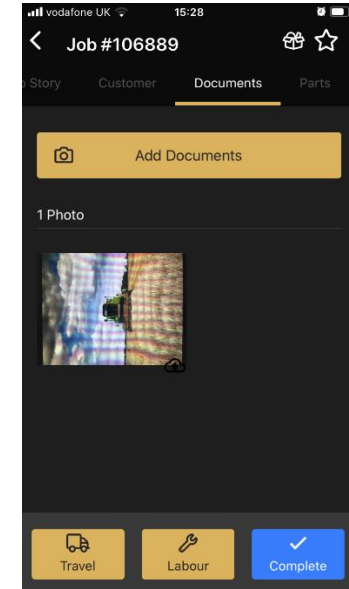
In the Documents Tab, add images to the job by clicking the 'Add Documents' button at the top of the screen.



'Camera Roll' allows you to add photos from your photo gallery. 'Take Photo' opens the camera function



If you choose 'Take Photo', you have the option to re-take it or use it. The look of this feature may vary across devices



Photos will show as thumbnails. Click on an image to open it in full screen mode and scroll through them.

If you have Wi-Fi connection, all images will be sent to the portal as soon as they have been added to the job. If you do not have Wi-Fi, the images will sit in a queue and will be sent as soon as you have connection. You can see the status of each image by the icons next to their thumbnails:



image has not been sent to the Portal



image has failed to reach the Portal



image has reached the Portal



Did you know?

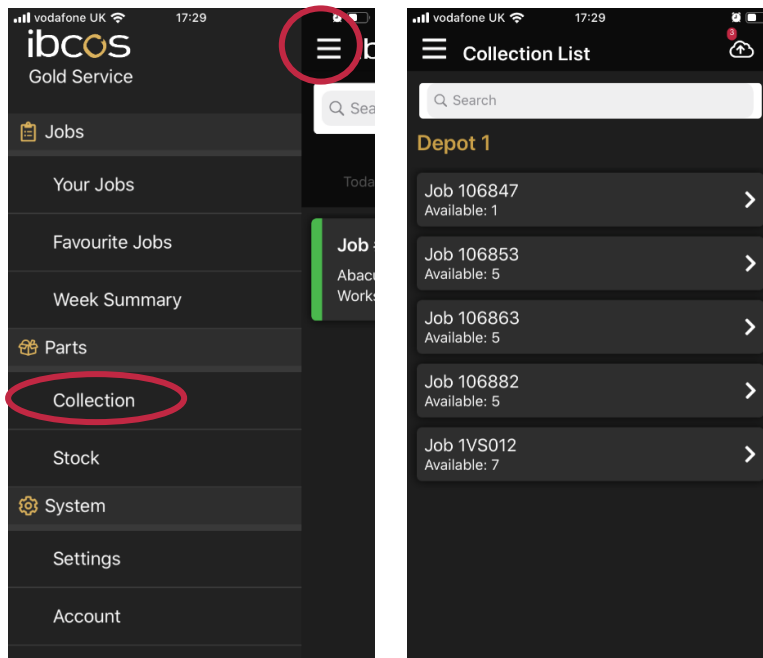
Once you have added an image to the job, you are unable to remove it from the App – they can only be removed by a manager in the Portal.

Parts Feature

App Overview

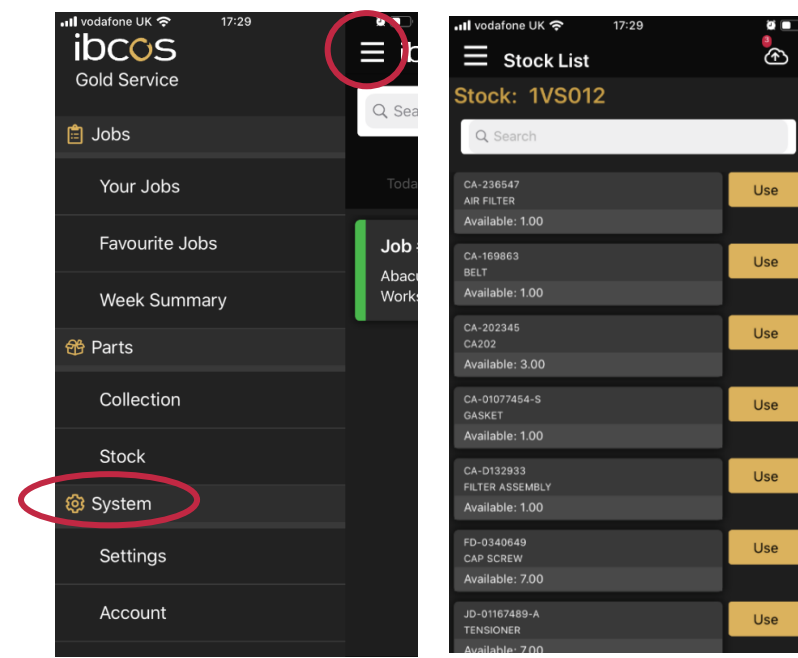
The Parts section in the side menu on the App is split into two main areas: Collection and Stock. To access either area, click on the menu icon at the top left-hand side of the screen to open the side menu.

COLLECTION SCREEN



The 'Collection' screen shows all parts specifically allocated to a job. The parts need to be marked as collected before you can use them on the job.

STOCK SCREEN

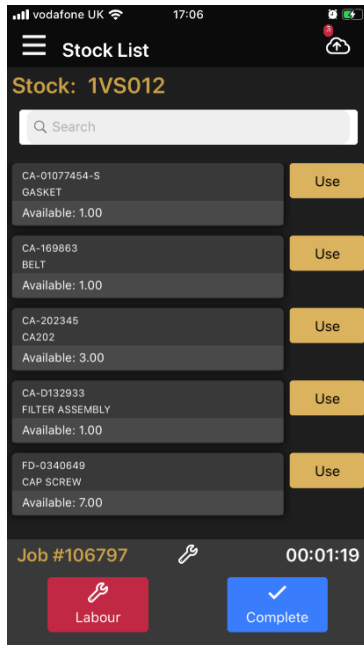


The 'Stock' screen shows a list of your Personal van stock, which is available for you to use as and when necessary against any job.

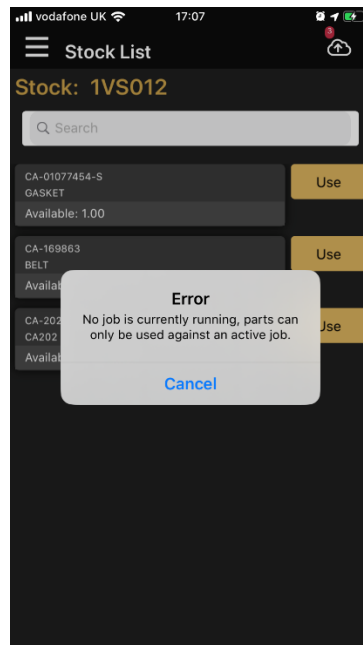
The next couple of pages show you how to use the Stock screen to allocate more parts to a job, and the Collection screen to mark parts as collected on the App.

Allocate stock to a job on the App

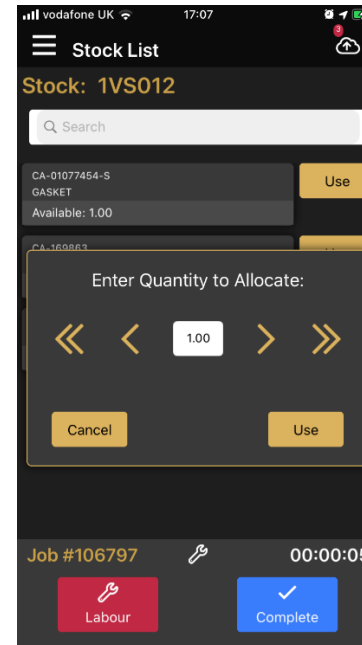
You can allocate parts to a job from your personal stock if needed. Open the main menu and click 'Stock'.



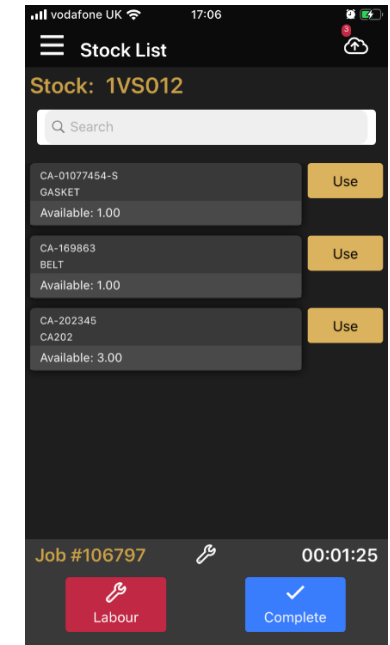
You will see a list of all the parts in your personal stock. The 'available' quantity shows how many you have to use of each part. This number will decrease as you allocate the parts to jobs.



You can only allocate stock to a job if you are logging time against it. If not, you will see an error message appear which says: 'No job is currently running, parts can only be used against an active job'.



Open the job you want to allocate stock to and start logging time. Go back to your stock and select the parts you need. Press the 'Use' button, choose the amount you want to allocate and press 'Accept'.



The available quantity will decrease to reflect the amount used. Once the full quantity of the part is used, it disappears from the screen entirely. Allocated parts are now available on the job.



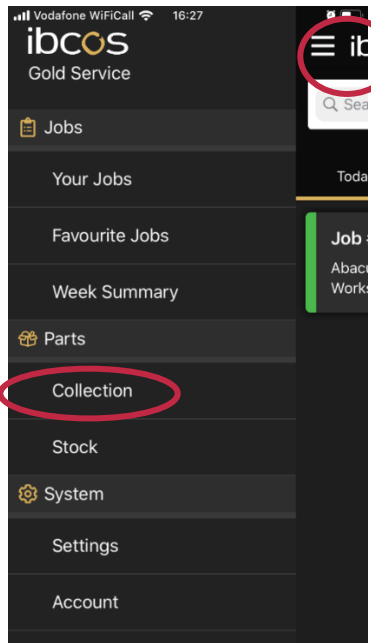
Did you know?

The < > arrows increases the amount by 1, and the << >> arrows increases the amount by 10.

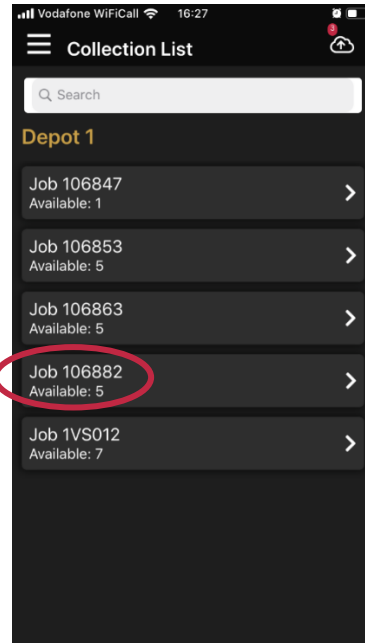
For any parts that have decimal quantities, you can increase or decrease the amount collected by a value of 0.1 by pressing the < > arrows

Mark parts as collected on the App

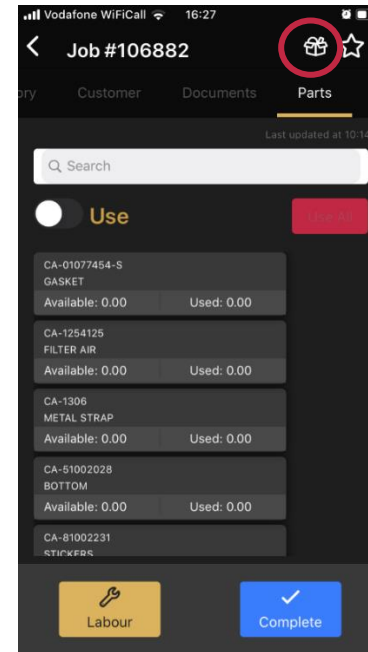
When you open a job in the App, you will see the list of parts allocated to that job. However, to be able to use these parts, you must mark them as collected first. Parts that have not been marked as collected will be visible in the job, but the used and returns buttons will be disabled.



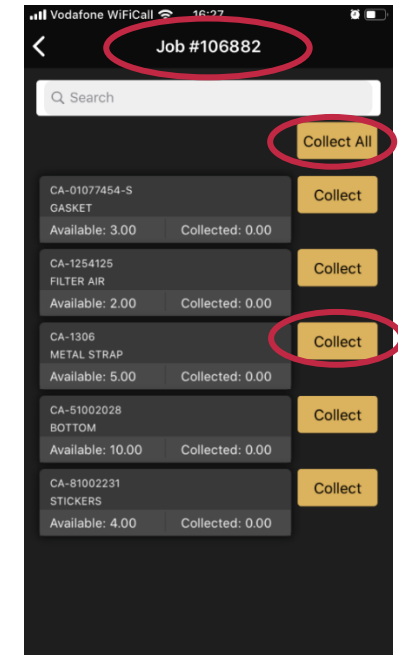
To mark parts as collected, click on the menu at the top of the screen to open the side menu. From here, click on 'Collection' option in the 'Parts' section.



This opens a new screen and will show all the jobs which have parts awaiting collection. Click on the job you want to open the parts collection screen.



Alternatively, you can jump straight to the collection screen from the job by pressing the 'box' icon at the top of the screen. This will take you directly to the collection screen.



Collect parts individually, or collect all parts at once by using the collect all button. Note: once you have marked parts as collected you cannot undo this.

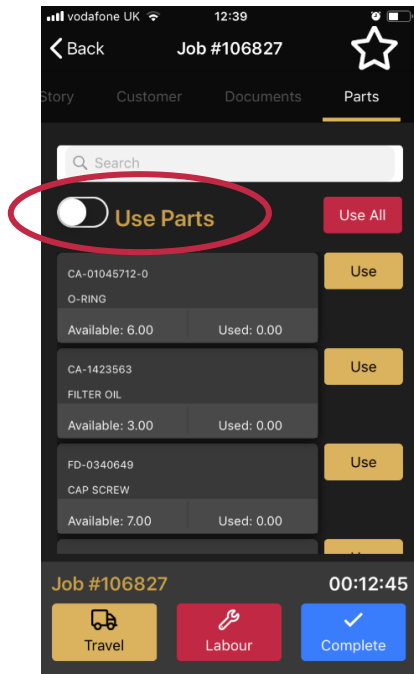


Did you know?

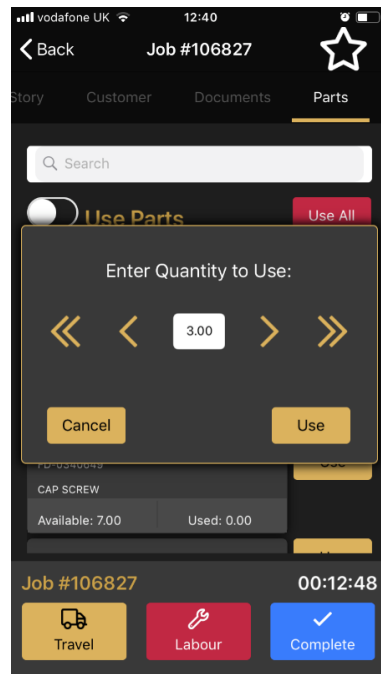
Only parts which have been collected in the App will show on the Parts screen in the Portal. We recommend that you collect all parts allocated to the job, and then mark them as used or returned in the App to ensure everything has been accounted for in the Portal.

Mark parts as used on a job in the App

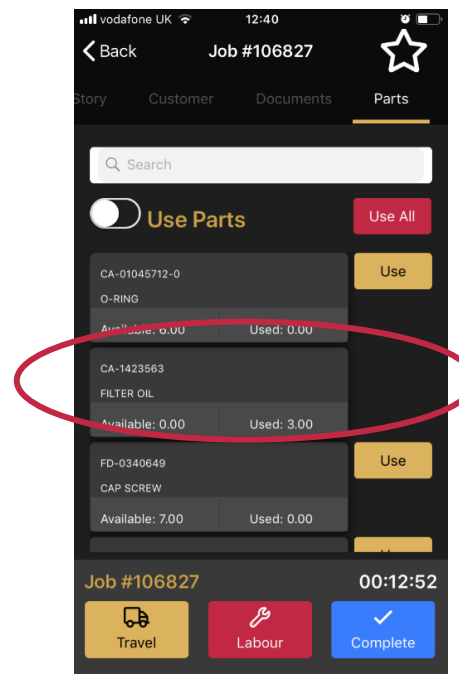
You will see the list of parts within the job on the App. You must mark them as collected before you can mark them as used or returned on the job.



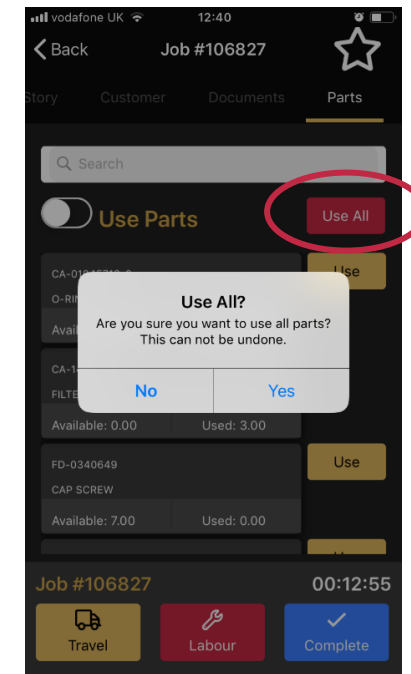
In the job, scroll to the 'Parts' tab to see all parts allocated to the job. Switch between the 'Use' and 'Return' screen by clicking the toggle button.



To use a part, press the 'Use' button, choose the amount you want then click 'Use'. The quantity and available numbers will change to reflect what has been used.



When the total quantity of the part is used, the use button disappears. Note: Once you use a part in the app you cannot undo it – this will have to be done in the Gold.



To use all parts at once, press the 'Use All' button. A message will appear asking if you're sure you want to use all. Remember, this action cannot be undone in the App.



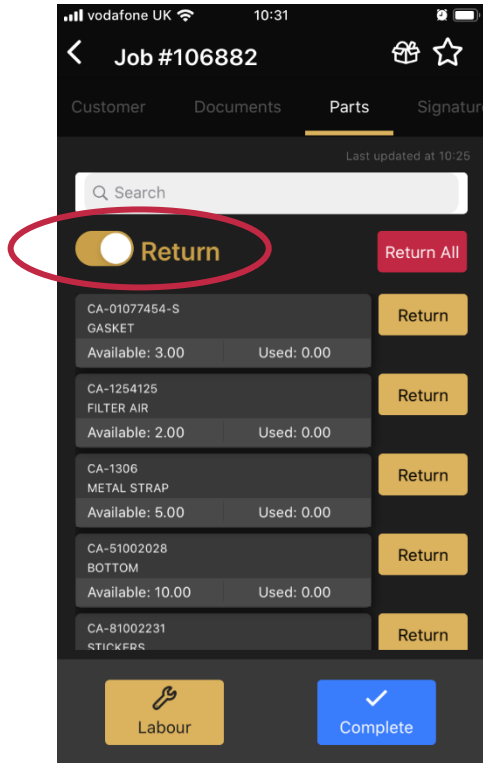
Did you know?

The < > arrows increases the amount by 1, and the << >> arrows increases the amount by 10.

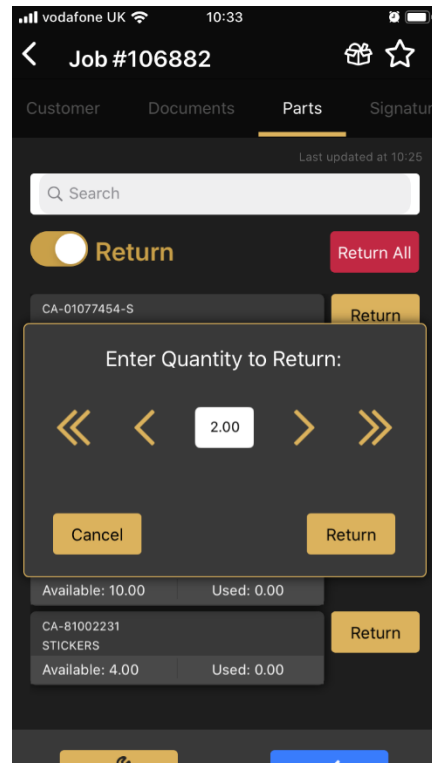
For any parts that have partial quantities, you can increase or decrease the amount collected by a value of 0.1 by pressing the < > arrows

Mark parts as returned on a job in the App

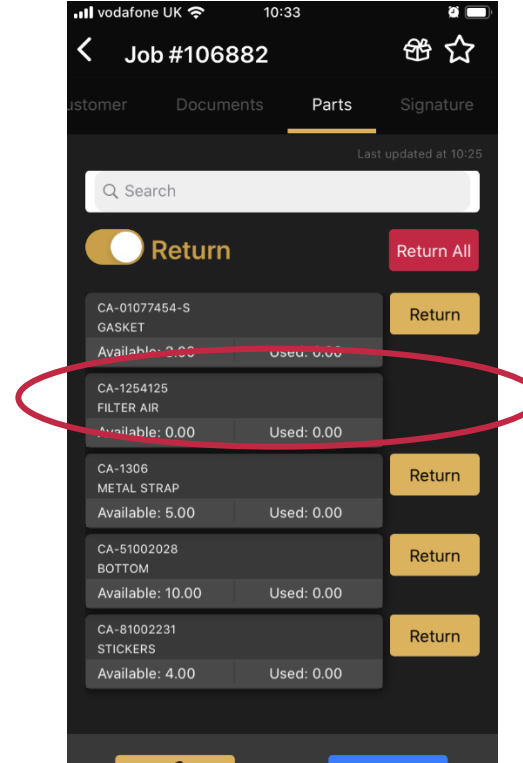
You should mark any parts that are not required on the job as returned in the App. This will then show in the Parts Tab 'Returned' column on the Portal.



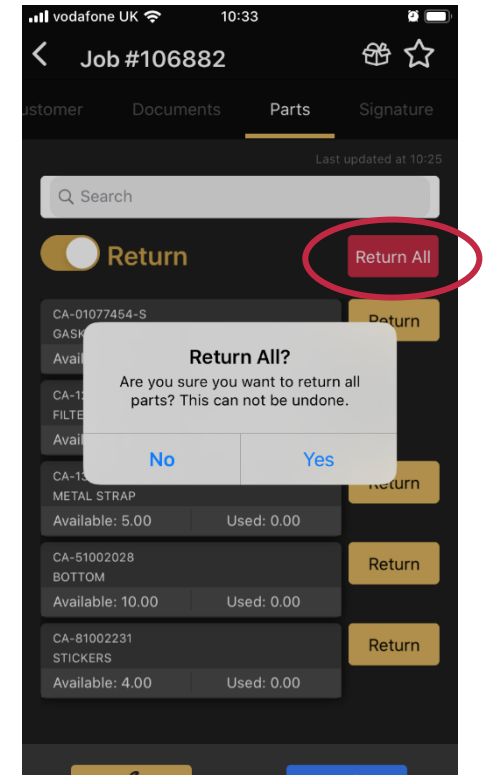
Make sure you are in the return screen by pressing the toggle button at the top of the page. Find the part you want to return and click the 'Return' button.



Choose the amount you want to return and then click 'Return'. The quantity and available numbers will change to reflect what has been returned.



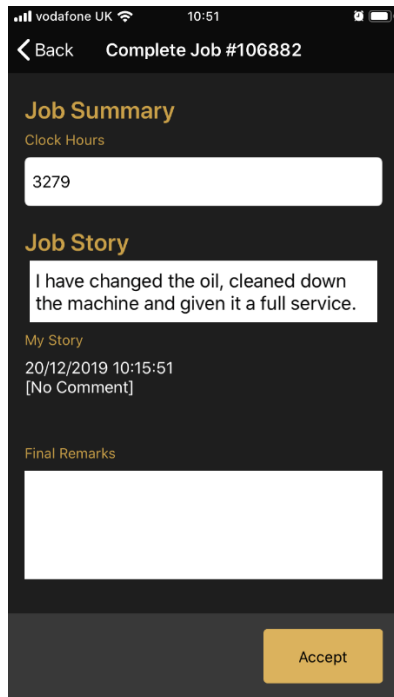
When the total quantity of the part is returned, the return button disappears. Once you return a part in the app you cannot undo it – this will have to be done in the Gold.



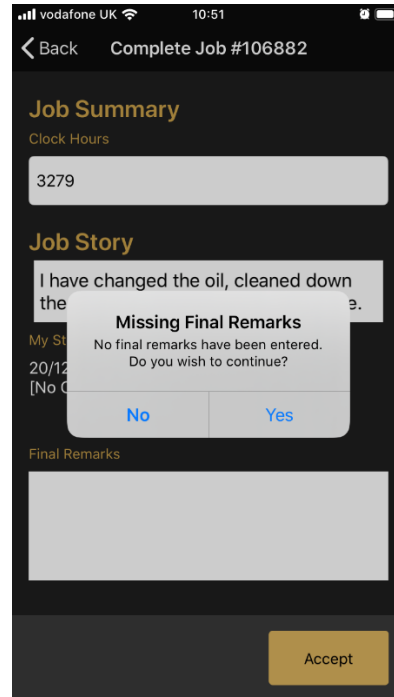
To return all parts at once, press the 'Return All' button. A message will appear asking if you're sure you want to return all. Remember, this action cannot be undone in the App.

Completing jobs with outstanding parts in the App

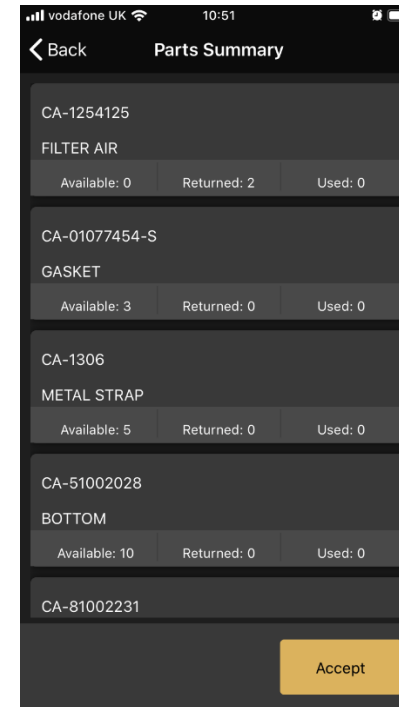
All parts must be marked as either used or returned on a job before it can be completed; this ensures all parts allocated to the job have been accounted for.



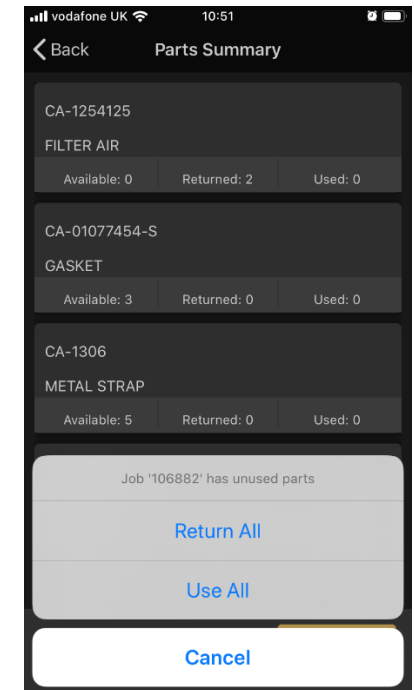
When you are ready to complete the job, you should review the information entered and then press the 'Accept' button as per the current process.



If the clock hours or final remarks have not been entered, a message will appear asking if you wish to continue. Click the 'Accept' button if you are happy to continue.



This will open a 'Parts Summary' screen which shows a list of all the outstanding parts on the job and their status (available / used / returned). Press the accept button.



A pop up will appear prompting you to 'Return All' or 'Use All' of the outstanding parts. This action ensures all the parts allocated to that job have been accounted for.



Did you know?

It is no longer mandatory to complete the Clock hours or final remarks. A notification will prompt you to confirm you want to leave them blank.