Gold Service

Managers Instruction Manual

Version 0.1

14th February 2020

Contents

Overview of Gold Service

What is Gold Service?

Gold Service is split into 2 elements: The Mobile App and The Web Portal. The engineers will use the Mobile App to log time, activities and documents against jobs and this information is fed back to the Web Portal for users to view, amend and authorise this information.

The following diagrams show the process followed by engineers using the Mobile App and approvers using the Web Portal:

GOLD ➡ **MOBILE APP** ➡ **WEB PORTAL** ➡ **GOLD**

A job is created in Gold or Scheduler and assigned to the engineer. The job then appears in the Mobile App

The engineer works on the job using the Mobile App. Information is sent back to the Portal at different stages in the process

The Manager then approves the data for the job in the Web Portal, and has the option to print off the updated job confirmation

When the manager is happy that the job is completed, it is then invoiced to the customer using the usual Gold process

Start Labour Time → Carry out the work as instructed → Go to the Job Story screen → Complete the details of what has been done → Press the 'Save' button → Stop Labour Time → Enter a short comment in the Labour Comments box

The clock will start recording time

Comments box is accessible if the job has been customised

Information is sent to the Portal and Gold and is visible in the Job Story box

Labour line comments box will appear

Information is sent to the Portal and is visible next to the labour line

What does this document contain?

This document is intended to be used as a training manual for all users of the Web Portal. It contains screen shots and process instructions for all parts of the Mobile App and Web Portal. There is a separate, bitesize Training Manual for the Mobile App for the Engineers.

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

Overview of the Web Portal

The Web Portal contains the information from jobs that are being worked on in the Mobile App including:

- Stop and start times for travel and labour
- Clock hours of the machine the engineer is working on
- Travel Mileage
- Job story
- Parts used and returned on a job (only available with a Gold Service 2 licence)
- Photos added to the job (only available with a Gold Service 2 licence)
- Customer signature

Using the Web Portal, the managers can review jobs in progress, view and authorise photos added to the job and approve completed jobs.

Accessing the Web Portal

To access the Web Portal, open a web browser and enter the specific URL provided by Ibcos when Gold Service was implemented.

This URL is unique to each dealership.

The URL will prompt you to enter a username and password. Note: This will be different to the username and password used to access Gold. It will have been provided by a system administrator.

Enter the username and password, and press the Log In button

Overview of Core Portal Screens

Job Screen

When you log into the Web Portal, it will take you to the Job screen. You will see 2 tabs at the top of this screen: 'In Progress' and 'Logged'.
The 'In Progress' tab shows you all the jobs the engineers are currently working on and have not yet marked as completed. The 'Logged tab' shows you all the jobs that have been completed and are now logged for checking. You will also see a drop-down menu which allows you to move between depots as well as a search bar which allows you to search for information.
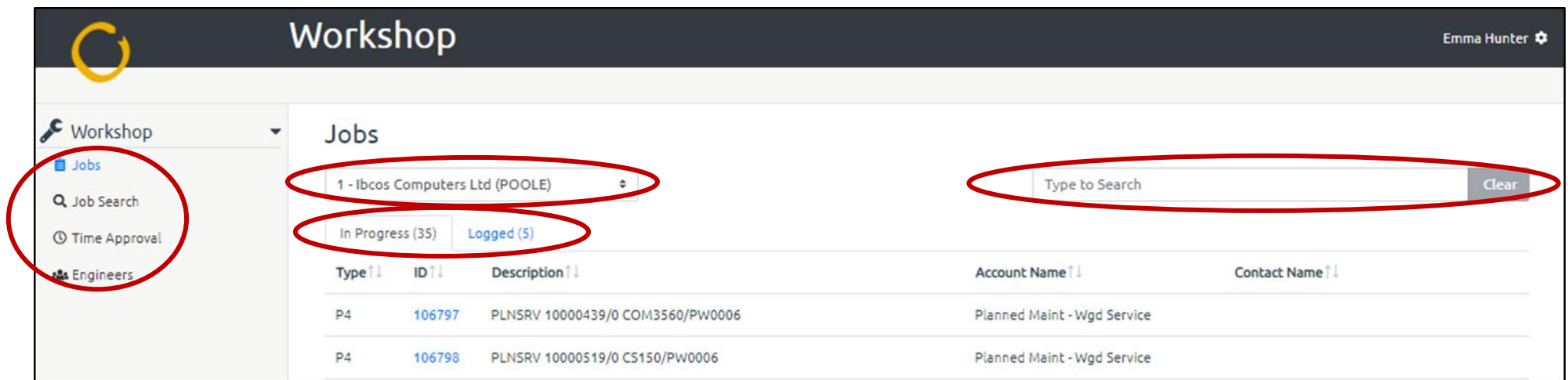
Down the left-hand side of the screen, you will see various options to take you to other areas of the Web Portal. These include:

- **Jobs:**   Shows a list of all jobs which are allocated to engineers.
- **Job Search:**   Enables you to search for jobs
- **Time Approval:**   Enables you to approve engineers time entries and amend the data before approval
- **Engineers:**   This read only screen provides details of all the engineers

Did you know?
When you select an individual depot, only the engineers belonging to that depot will be shown. However, all time logged, regardless of depot, will be shown for each engineer.

Job Search Screen

The Job Search screen allows you to carry out advanced searches for information. At the top of the screen you will see a search bar. You can input your search criteria here, and then use the filters shown underneath the search bar to narrow down your search field. These filters include:

- Depot filter
- Engineer filter
- Status filter
- Start date filter
- End date filter

When you click on either date field it will bring up a calendar mode allowing you to easily choose the required date.
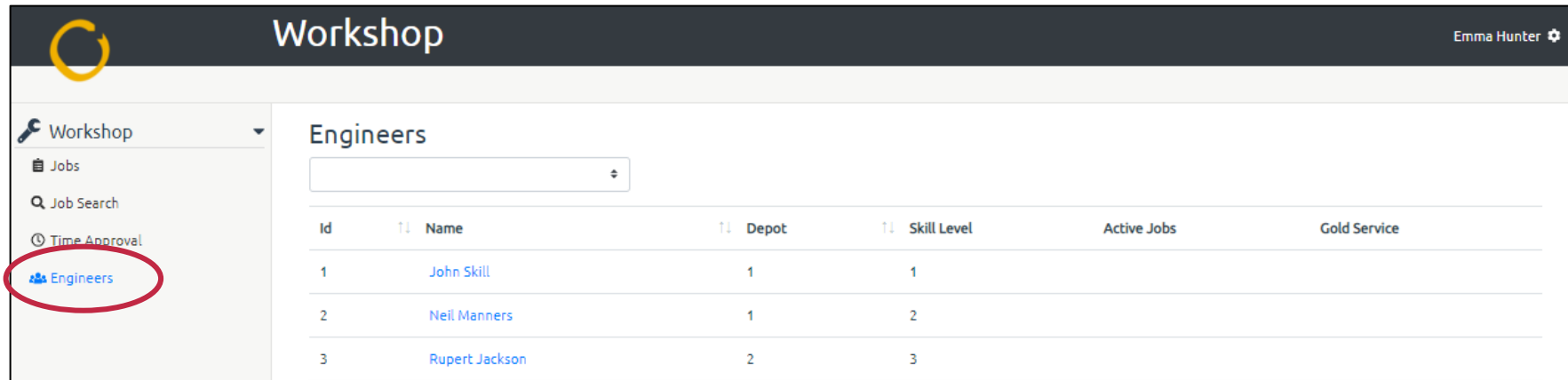

Did you know?
If you need some help on the screen you are in, you can click the blue help button at the top right. This will bring up a description box to explain how to use the screen.
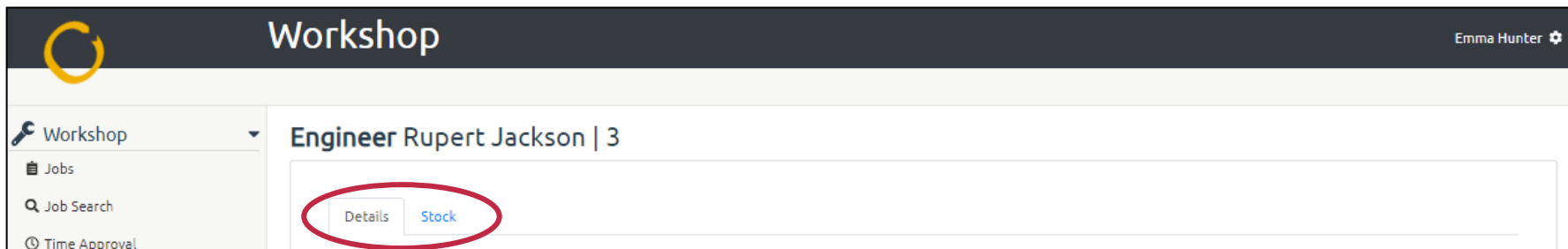
Engineers Screen

In the Portal, you will see a new title under the workshop section called 'Engineers'. If you click on this, it will show a list of your engineers.

When you click on an engineer's name, it will open to a new page with 2 tabs: 'Details' and Stock'.

Did you know?
The Stock Tab in the Engineers screen relates to the parts feature. More information on this feature can be found in the Parts Feature section.

Engineers Screen – Details Tab

The Details tab shows all the information about that engineer, including their lunch start and end times, skill level, weekly working hours etc. All the fields shown in this tab are read only and cannot be amended. Should you need to amend any information, you will need to do so in Gold.

How to search for a job in the Portal

There are two main areas on the Portal that you can search for jobs: the 'Job Screen' and the 'Job Search' screen (both options can be found in the menu to the left-hand side of the screen). The Job screen is a high-level search function, whilst the 'Job Search' screen allows you to search on more in-depth filters and information.

To search for a job using the Job Screen, enter the job number in the search bar located at the top right-hand side of the screen. You will notice the 'In Progress' and 'Logged' tabs show the number of jobs matching that description. If you are in the wrong tab, it will say 'no jobs match your search criteria', whilst the correct tab will show a number against it indicating a job has been found.
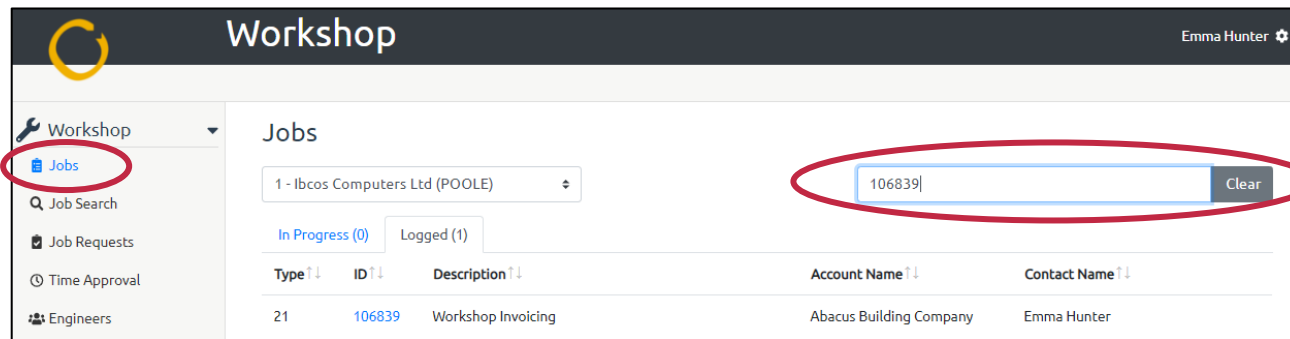

The Job Search screen allows you to search using drop down filters to narrow the search on depots, engineers, status of the job, start and end date of the job.
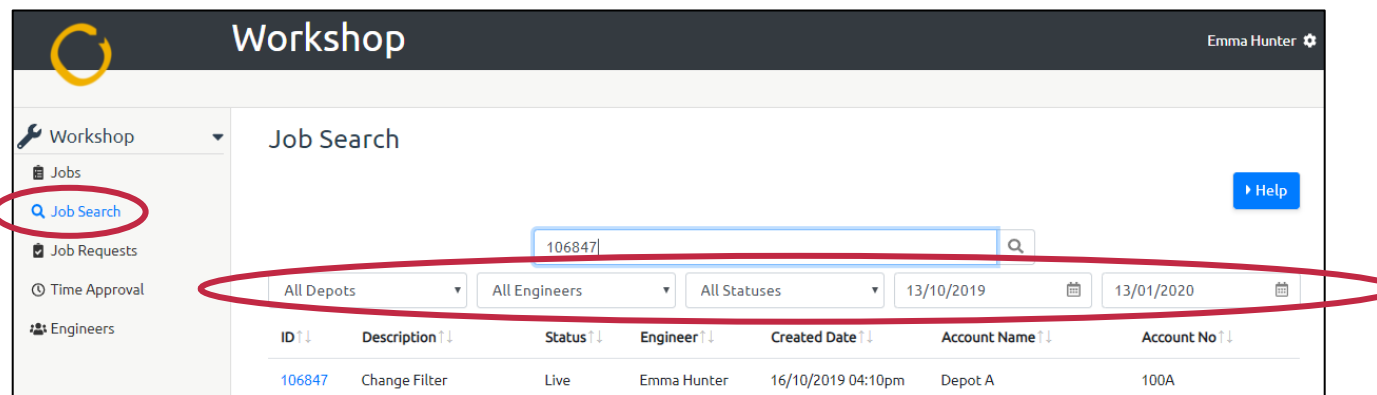
How to add, amend, delete and approve time in the Portal

The Time Approval Screen

When engineers log time using the App, it will show in the Time Approval screen on the Portal. From here, the managers can view and approve the time that the engineers have logged. They can also add, amend or delete entries if necessary.
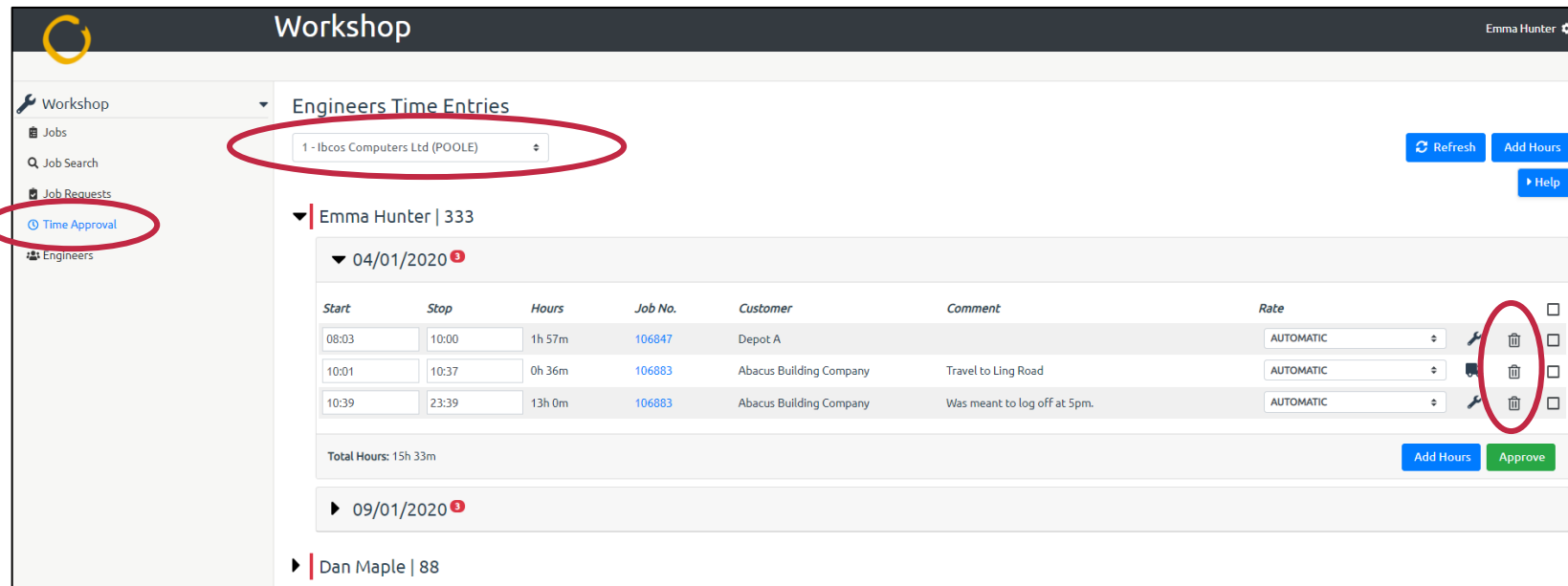
The default view is set to show all depots and all engineers. This can be changed using the drop-down box at the top left of the screen. When you select an individual depot, only the engineers belonging to that depot will be shown.

Click on the engineer to expand their details. Time entries are shown in date order, with the oldest first. All time logged by that engineer for that day will be shown on this screen, even after it has been approved. This is to ensure you have complete visibility of what the engineer has done for that date.

Click on the spanner or van icons to see if the charge is standard or set against a flat rate. If it is a flat rate, the description of the rate will be shown.

Click on the job number to open the job and view Customer, Wholegood, Labour and History information. More detail on this can be found in this manual.

A breakdown of the Time Approval Screen symbols

Start — Start time of labour or travel time recorded

Stop — End time of labour or travel time recorded

Hours — Total time recorded for that entry

Total Hours — Shows the total number of hours logged by that engineer for the day

Job No. — Shows the job number that the time entry was logged against. Click on the link to open the job in full screen mode

Customer — Shows the associated customer

Comment — Displays any comments added to the time recording in the App by the engineer

 — Shows that the time recorded is related to labour

 — Shows that the time recorded is related to travel

 — The tick boxes allow you to select the row. The tick box at the very top of the column allows you to select all rows at once

 — Shows that a row has been selected

 — Allows you to delete a selected row. This symbol is only active against rows which have not yet been approved

 — Shows that a row has been approved

Approve — The Approve button allows you to approve time of the selected row(s)

Add Hours — The Add Hours button allows you to add further time for the engineer against that job

 — Shows the number of unapproved data entries for that job

How to add hours for an engineer in the Portal

You can add hours for an engineer in the Portal using the Time Approval Screen. There are 2 methods of doing this.

The first is to use the 'Add Hours' button at the top right-hand side of the screen. This will open a new box and allow you to fill in the details to add extra hours. In this screen, you have the option to 'pre-approve' the time before you add the entry. When you are happy with the content, press the save button. This will take you back to the Time Approval screen.

The second is to use the 'Add Hours' button at the bottom right-hand side of the screen. This will create an extra labour line at the bottom of the engineer's section, allowing you to enter the data for the extra hours.

How to amend logged time entries in the Portal

All time entries made in the App by the engineer will show in the Time Approval screen on the Portal.

You can amend the start and stop time of the entries if they are incorrect. To do this, click into the box you want to amend and enter the new time. Time entries must be in the format hh:mm – if the recorded time goes past midnight into the next day, a black triangle will appear next to the labour line. Clicking on this triangle will open a box asking if this time is correct and enable you to change the stop date if necessary.

Any amendments made to the start and stop times will be captured in the history tab of the Portal for auditing purposes.

Did you know?
When amending labour time in the Portal, if the screen refreshes before the amendment is approved, it will revert to the original time.

How to delete logged time entries in the Portal

All time entries made in the App by the engineer will show in the Time Approval screen on the Portal. Individual time entries can be deleted selecting the entry and pressing the 'Bin' icon. A message will appear asking if you are sure you want to delete the entry. Press 'Delete' to remove it, or 'Cancel' to abort.

When an entry is deleted, the row will appear crossed out on the screen initially. Once the screen has been refreshed, the entry will disappear completely.

Did you know?
When you delete an entry, it will be captured in the History tab of the Portal for auditing purposes.

How to change labour rates in the Portal

You can now change the rates set against individual time entries in the Portal before approving them. This feature allows you to select specific rates other than the time clock control determined 'Automatic Rate'.

This functionality will only work in conjunction with the current Gold process which is to set the applicable labour rates on either the 'Hours Per Day' or 'Time of Day' basis in the 'Time Clock Control' maintenance program.

You will see a drop-down list in the Time Approval Screen under the 'Rate' column. The Labour Rates descriptions set in Gold will determine the options available in these drop-down lists, and the option you choose will determine the rate that is charged to the customer for that labour line.

The default rate on the Portal will be set to the 'AUTOMATIC' option, which will pull the rates from the Time Clock File in Gold. If no information is set in the Time Clock program, the default labour rate set on the invoice types will be used. If no rates are set in the Invoice Type Screen, the default labour rate set in the Engineer Rate program will be used.

To override the default rate, choose another option from the drop-down list, and approve the time entry. The next few pages show you how to set the labour rates up in Gold, and how to amend them in the Portal.

How to approve logged time entries in the Portal

When the engineer has logged time in the App, it will show in the Time Approval screen. From here, it will need to be approved for the entry to be added to the job. If you hover over the spanner icon, it will show you what type of labour rate it is (i.e. standard labour rate)

To approve the time entry, select the row using the tick box, and press the 'Approve' button. Any rows which have been selected will show a tick in the tick box ☑ and these will all be approved. Once they have been approved, the tick box will change to green ☑

Once all the rows have been approved for a specific engineer / date combination, the time entries will disappear from the screen when it is refreshed. If more time is logged against that engineer for that date, all the time entries will all re-appear on the screen again with the status of approved.

Did you know?
When the time entry has been approved in the Portal, it will be updated in Gold.

Overview of the Full Screen Mode of a Job

Job numbers in the Portal are hyperlinks and can be used to open the job in full screen mode. These hyperlinks will work in any screen that they appear in (for example, the Search screen, Time Approval screen and Jobs screen).

When you open in full screen mode you will see numerous Tabs across the middle of the screen – Job, Customer, Wholegood, Labour and History. At the top of the screen you will see the job information (Job Number, Status, Customer, Invoice Type and Date), and at the bottom of the screen you will see the Job Confirmation button. All of these will be visible no matter which tab you are in.

When you open a job in full screen mode, you will default to the Job Tab. If you want to make the story box and parts box bigger, you can click on the 3 lines at the bottom left hand corner of the box and drag it down. This will make the box larger.

Did you know?
When you are in Full Screen Mode and you press the back button of your internet browser, it will take you back to the previous main screen and will not navigate back through the tabs. This is expected web-based behaviour which we are unable to change.

Job Tab

You can view and amend details added to the job by the engineer in the Gold Service Mobile App. To do this, search for the job that you want to view or amend and click on the job number to open the job's full screen mode. The screen will default to the 'Job' tab. From here, there are 4 main areas you can amend:

Mileage: If the mileage has been entered in the App by the engineer, it will appear on this screen. If not, it will remain blank
Job Story: If a story has been set against an invoice type in Gold, it will here alongside any information entered in the App by the engineer
Clock Hours: If the clock hours have been entered in the App by the engineer, it will appear on this screen. If not, it will remain blank
Parts: Parts notes added to the parts text box in the App will be visible here once the job has been marked as completed in the App

To amend these areas in the Portal, click on the box you want to amend, type in the information and press the save button. For mileage and clock hours you can use the arrows that appear when you click on the box to increase or decrease the value as necessary.

If you enter information and want to revert to the original data, you can press the reset button. This only works if you have not yet pressed the save button.

Customer Tab

The Customer Tab provides visibility of the following information:

- Customer Account Number
- Customer Contact Name
- Customer Delivery Address
- Account Name
- Customer Phone Number

The data on this screen is pulled from the information entered when you created the job in Gold and cannot be amended in the Portal.

Wholegood Tab

The Wholegood tab contains all the information relating to the Wholegood being worked on.

This data on this screen is pulled from the information entered when you created the job in Gold and cannot be amended in the Portal.

Engineers can add the serial number to the job in the description tab of the App. This information is then fed back to the Portal. Should the information entered not correspond with the serial number registered to the Wholegood, you will see a warning triangle

Labour Tab

The Labour Tab allows you to view all the labour recorded for that job by all the engineers who have worked on it. This screen cannot be edited.

- **The Rate Column** – Shows the rate the labour was charged against
- **The Labour Description** - Shows the times for the labour
- **Date Column** – Shows the date the work was carried out
- **Engineer Column** – Shows the engineer who recorded that labour line
- **Hours Column** – Shows the total number of hours for that labour line
- **Value Column** – Shows the monetary value of that labour line – this information matches that in Gold

Did you know?
When you are in the Labour Tab, you can click on the Engineers name. The hyperlink will take you to the Engineers details page where you can view information such as lunch start and end times, skill level, weekly hours worked etc.

History Tab

The History Tab captures and records all activity that is made from both the App and the Portal and is particularly useful for audit purposes.

Did you know?
The History Tab also captures the GPS location of an engineer when they stop recording time. You will need to have a Gold Service 2.0 licence to take advantage of this feature. More information on the GPS Stamp Location feature can be found in this manual.

How to view and print a PDF Job Card

At any point before invoicing a job, you can view and print a PDF job confirmation from the Portal. To do this, search for the job you want and open it in full screen mode. You will notice a blue 'Job Confirmation' button at the bottom right hand side of the screen. This button is visible on all tabs in that job and can be utilised from any area.

Click on the 'Job Confirmation' button, and it will open the Job Confirmation in a new page. The next page of this manual will show what this looks like.

The job confirmation will contain all the details of the job. The data provided will pull through from the job on the Portal. You can use the 'Back' button to go back to the job and amend any necessary information, or you can use the 'Export to PDF' if you are happy with the content.

When you click the 'Export to PDF' button, the item will download to the bottom of your screen. Click on this to open the PDF on your screen.

Did you know?
Once a job has been invoiced, the Job Confirmation cannot be retrieved. Best practice would be to export the PDF and save this for future reference, especially in relation to warranty jobs.

Customisable job stories

When creating a workshop job in Gold, you have the ability to customise the job story. This enables elements of the job story to be completed at any time by the engineer on the Gold Service Mobile app, and when saved, the information will reach the Gold Service Portal immediately and be displayed in the Job Story box. This is without the engineer having to complete the job.

This feature has 2 methods of set up:

Pre-Set Headings:

Provides the engineer with separate sections to complete on the App based on pre-set headings in the story. Set them manually when creating a job or set them as a default story against an invoice type to automatically populate the job with this information. This process can be repeated for different combinations. Pre-set headings are often used for Warranty purposes e.g. headings of Complaint, Cause, Correction, Causal Part.

Free Text Box:

You can keep the job story in the App as a 'free' textbox, allowing the engineer to input any information without being prompted by specific headers.

It is not mandatory to customise the job story when creating the job in Gold. However, if you choose not to follow this process, then the engineer cannot edit the story and can only enter final remarks when the job is completed.

We recommend using the Customisable Job story feature if you want the story to reach the Portal before this point. Every time the engineer enters text into the story and saves it, the text will appear in the Portal. This feature works particularly well if the job is expected to last longer than a day and is for one engineer.

Please note: there are some constraints relating to multiple engineers working on the same job. Before you assign the job to another engineer, please ensure the previous engineer has checked the cloud icon in the app, and manually sent any outstanding data to the portal. If you do not follow these steps, and their story has not reached the Portal, the information will not be visible in the App to the next engineer and will not become part of the story in the Portal. Please also remember to upload Activities or documents first, and job completions last to ensure all the information reaches the Portal correctly.

The following table shows what symbols you need to use to customise your job story.

It is important that the text is entered correctly as it is the # and the = symbols that create the text boxes and single line fields. If this isn't done, the headings will not be split out into the separate sections for the engineer to complete.

The symbols must be used at the start of the sentence. If you use them anywhere within the middle of text that you write, it will not have any impact.

Text to enter on Job Story in Gold	What shows up in the Job Story on the App	Example
# Section Name	Generates a multi text area that the engineer can complete on the App	# Complaint
# Section Name Some pre-defined text		# Complaint Enter details of the complaint
= Field Name	Generates a single line field that the engineer can complete on the App	= Causal Part
= Field Name: Field Value		= Causal Part: enter part number
General Text	Will just appear on the App	Complete the following sections in full

Pre-set heading example

Here is an example of how to create pre-set headings. For any stories set up in this way, the text is displayed back on the portal and in other areas of Gold, like prints or reports, as plain text. It will match the format set up in the story:

Free text box example

Here is an example of how to create a single free text box for any stories set up in this way, the text is displayed back on the portal and in other areas of Gold, like prints or reports, as plain text. It will match the format set up in the story:

Understanding the different comment areas:

There are 3 areas that the engineer can add comments into Gold Service, which will reach the Portal. Each area should be used in a specific way to maximise their benefits:

- Labour Line Comments – should be used to enter information about the labour carried out and is designed for small pieces of information. For example: the engineer can use this comments box if they have forgotten to stop labour time.

- Job Story Comments – should be used to enter any information relating to the work they are carrying out. This information should be comprehensive and provide full visibility of what has been done throughout the job.

- Final Remarks – should be used to enter any final thoughts about the job.

The next few pages explain each comment area in detail.

Labour Line Comments:

When the engineer presses the button to stop logging time, a comments box will appear on the screen. It is not a mandatory requirement to use this box, but we do encourage the engineers to provide brief information about the labour time they have just recorded. For example: they can explain that they forgot to stop logging time and finished earlier. This information is sent to the Portal immediately and is visible next to the labour line in the Time Approval screen. It will also be visible in the 'my story' section of the Gold Service App.

As soon as the labour line has been authorised, this comment will appear in the History tab.

Job Story:

The Job Story section should be used by the engineer to provide information about the work they have carried out. If you have added any text into the Job Story when creating the job in Gold, it will show in the Job Story section on the Gold Service Mobile App,

If you have customised the job story, the text box will be available immediately for the engineer to complete at any time on the Gold Service Mobile app, and when saved, the information will reach the Gold Service Portal and Gold immediately and be displayed in the Job Story box. This is without the engineer having to complete the job. (See Image 1 below)

If you haven't customised the job story, the text box will not be available to the engineer until they complete the job (see Image 2 below):

<div align="center">

Image 1
Customised Job Story

</div>

<div align="center">
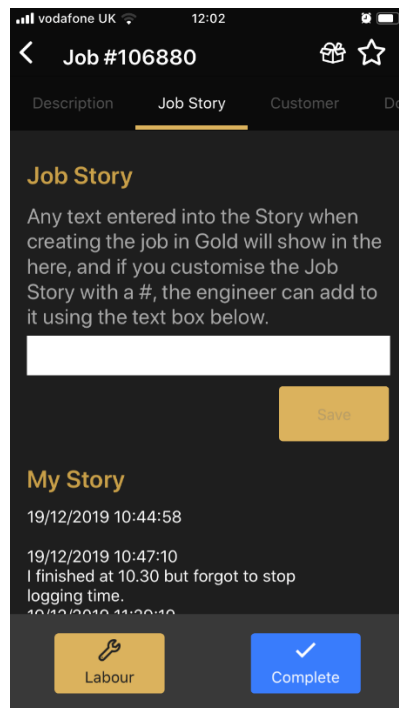
Image 2
Non-Customised Job Story

</div>
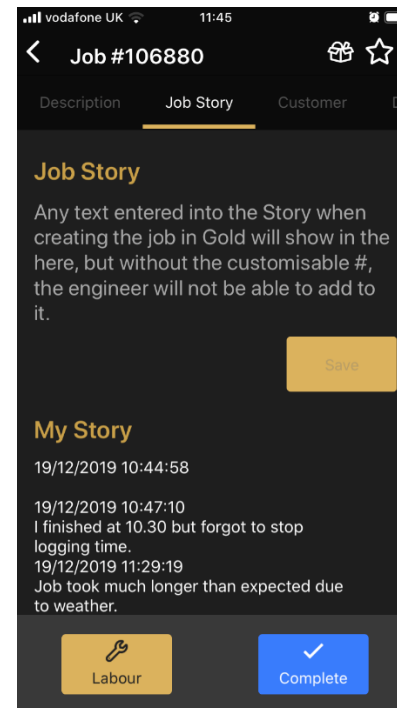
Final Remarks:

When the engineer presses the 'Complete' button, the Job Story will be visible to refresh their memory of what has been added during the work carried out. The Final Remarks box should be used by the engineer to add any final thoughts at the point of completing the job. This information will reach the Portal and be visible in the Job Story box.
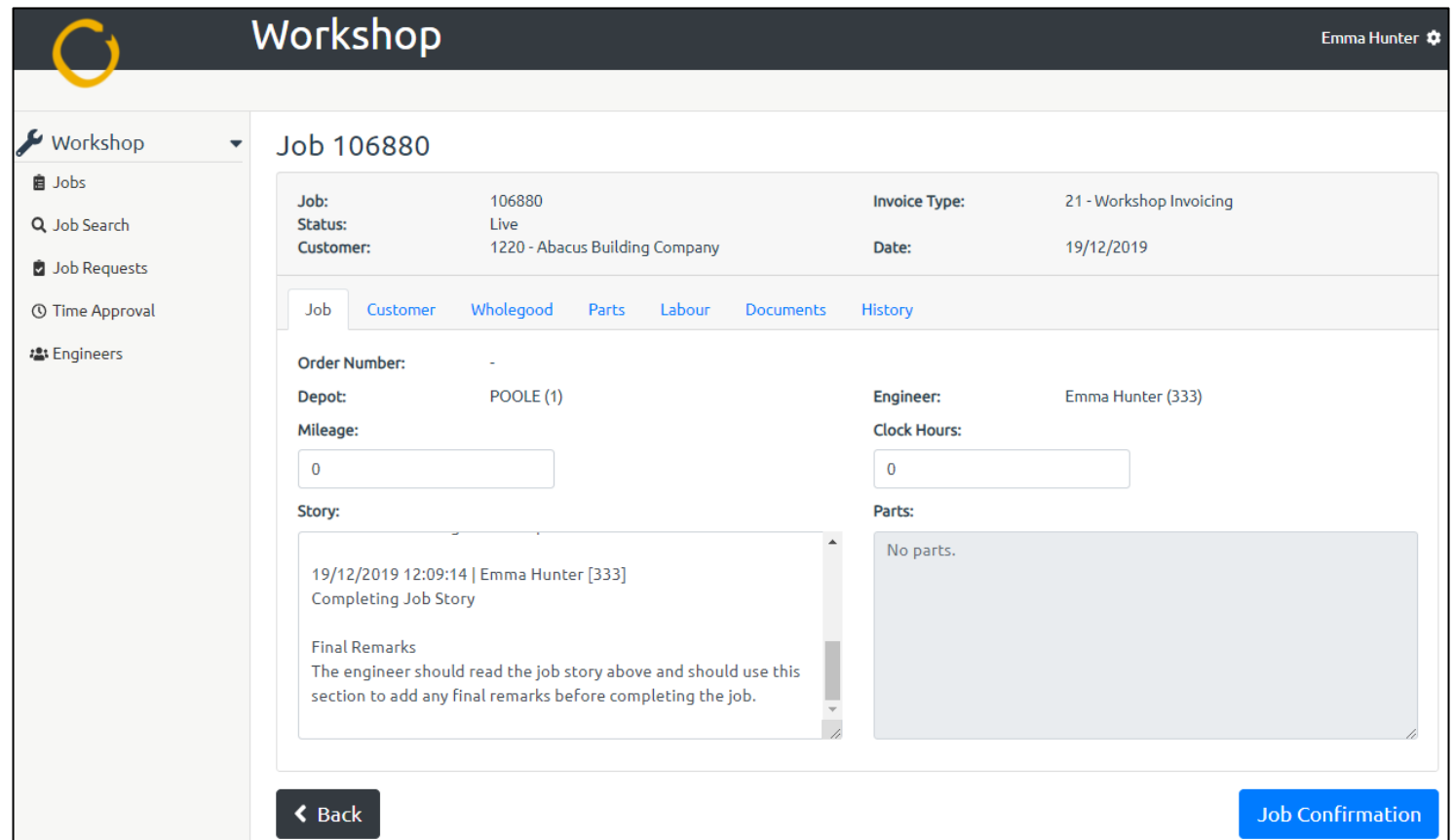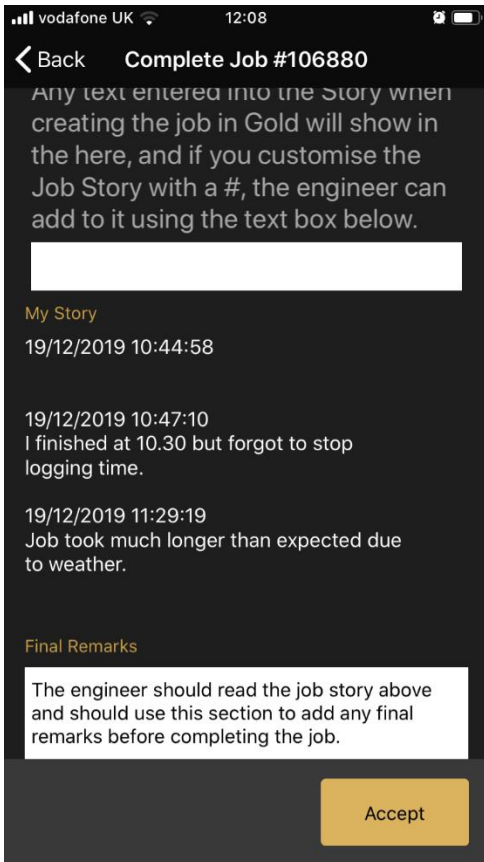
Overview of the Gold Service Mobile App

This section provides a brief overview of the Gold Service Mobile App screens, how to navigate through them and what functionality is in each one.

The Log-in Screen

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

The Log-in Screen
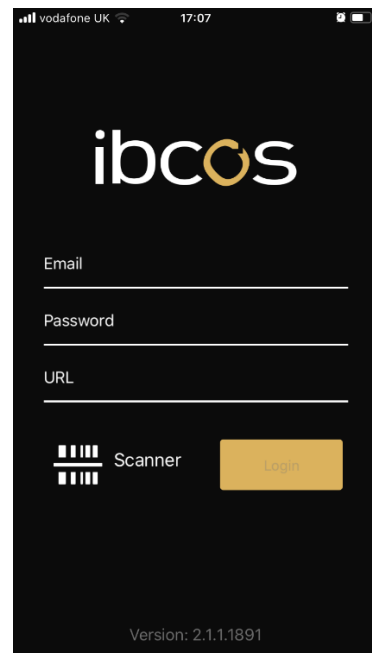
The Home Screen
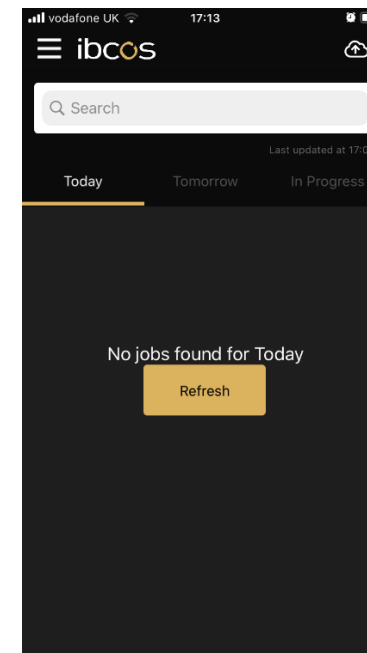
Did you know?
If the Gold Service Mobile App is inactive for a week or more, it will automatically log the engineer out and they will have to enter their log in credentials again to gain access.

The Home Screen

The Home Screen is the first screen the engineer will see when they log into the App. This screen has various functions:

Search Bar
The search bar allows the engineer to search for a job using criteria such as job number, customer name, date etc. This search bar is visible in most screens in the App.

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 scroll through the pages. You can also scroll the tab titles at the top of the page and select the one you want. The orange bar under the title denotes which tab you are currently on.

Last updated Time and Date
Engineers must refresh their screens on the Gold Service Mobile App to receive any changes or additions that have been made to their jobs. Whenever they refresh the screen, the date and time 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 the engineers 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
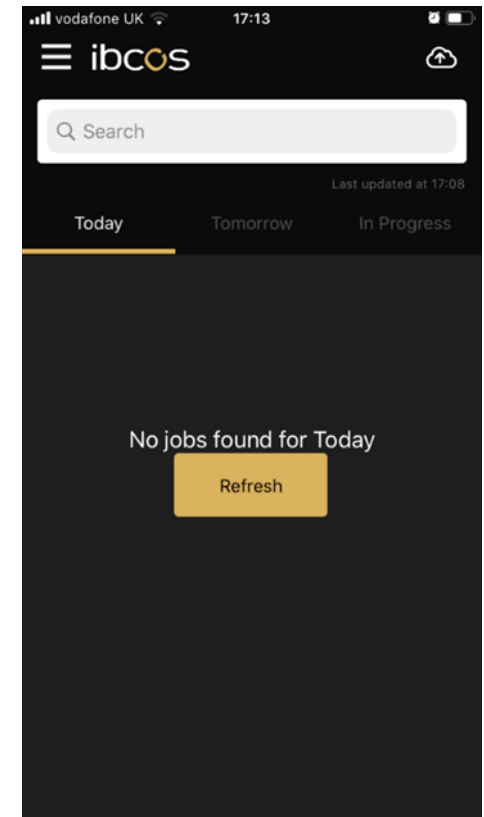
The Main Menu

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
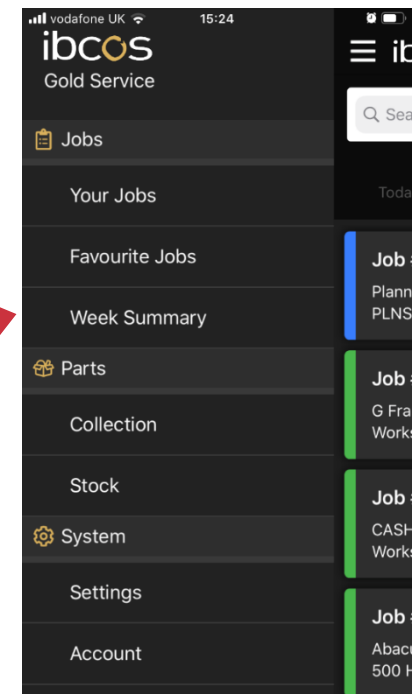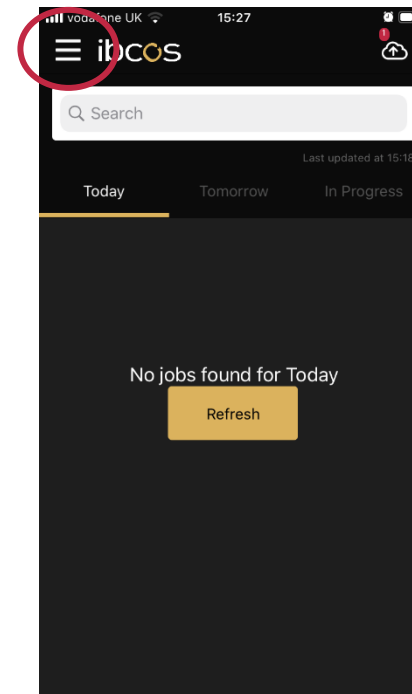
Did you know?
The main menu can only be accessed from the Home screen of the Mobile App.

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 the engineer has recorded for that week.
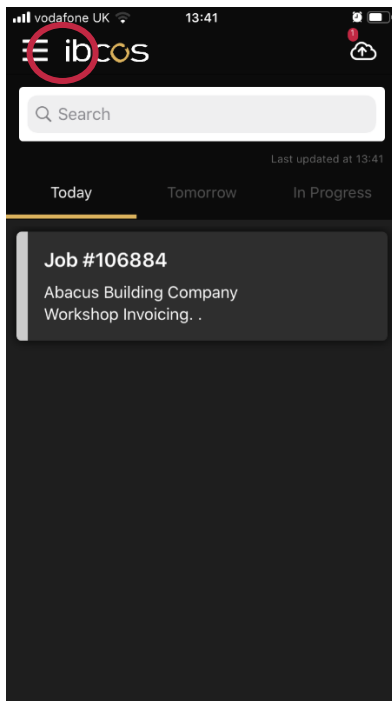
On the home screen, click on the Main Menu at the top left-hand side of the screen. This will open the main menu
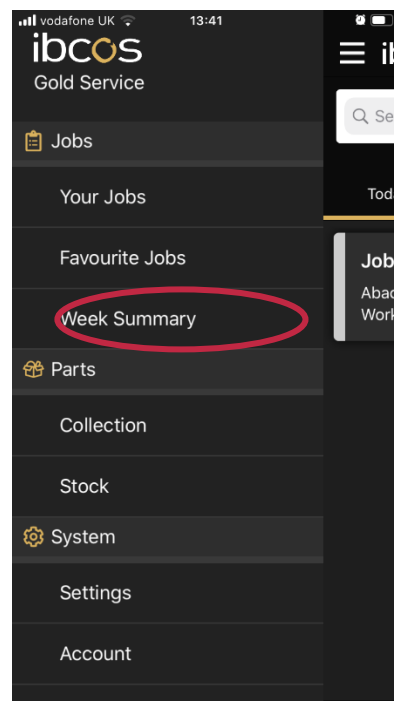
From here, choose the 'Week Summary' option. This will open a new screen showing all labour and travel time logged for that week
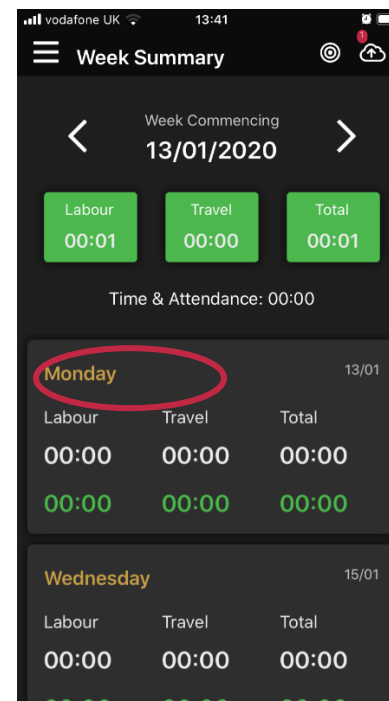
Here you will see all labour and travel time logged for that week.Click on one of the days to view all the jobs that time was logged against
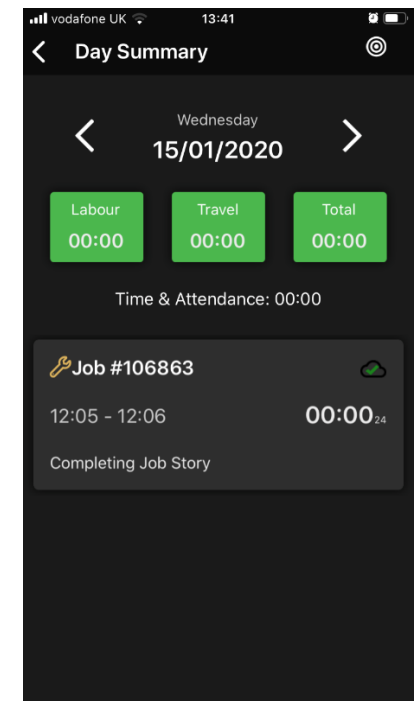
When you click on a day, it will open a new screen and show you all the jobs that time was logged against for that particular day

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 which has been pulled from the invoice type in Gold

Job Instructions
When a job is created in Gold, the user has the option to add instructions for the job in the instruction screen. Any information added to this screen will show in the Instructions section on the App.

```
Job: 106885  INV    Inv Type:21    Workshop Invoicing    │    Parts:        0.00
Cust:  1220  Abacus Building Company        17/01/20     │    Labour:       0.00
│Head│Cont│Parts│Lab│FlatR│Story│Inv│Instru│Op│Prt│Audit│Docs│OIP│Txt│Events│
   When creating the job in Gold, any information added to the instruction
   screen will show here
```
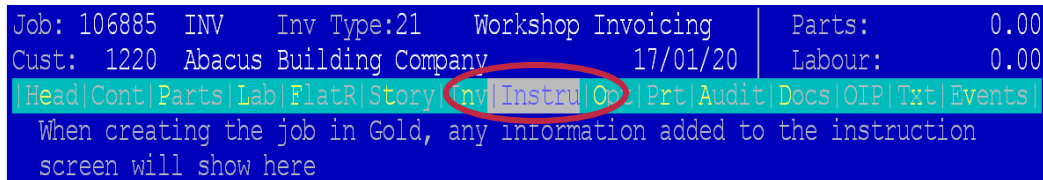
Wholegood Number
The Wholegood number is populated from the information in Gold. This field cannot be edited in the App

Wholegood
The name of the Wholegood is 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 engineers 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 engineers can manually enter the machines clock hours. This information will show in the Wholegood Tab of the Portal when the job has been completed.

Job Story Tab

The Job Story is the second tab in the Gold Service Mobile App. The screen is split into 2 sections: 'Job Story' and 'My Story'.

Job Story
The job story box is a blank text box where the engineer can provide information about the work they have carried out on the job. As soon as they 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, the engineer will not be able to enter information into the text box until the job has been completed. More information on the Customisable Job Story feature can be found in this manual.

My Story
The 'My Story' section captures all labour and travel time recorded by the engineer, as well as any comments added when they stopped recording time.

This information will appear in the Job Tab of the Portal as soon as the engineer has completed the job.
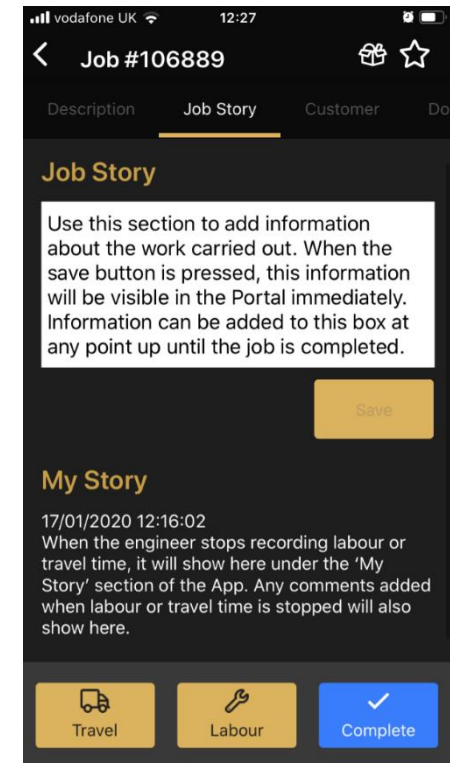
Did you know?
Instead of typing the information into the Job Story section, you can 'dictate' it by speaking into the phone. Instructions on how to do this can be found in this manual under the 'Dictating the Story' section.

Customer Tab

The Customer Screen is the third tab on the Gold Service Mobile App. This screen contains customer details such as:

Account Number
Shows the customer's account number. The information is populated from Gold and cannot be edited by the engineer.

Account Name
Shows the name of the customer. The information is populated from Gold and cannot be edited by the engineer.

Contact Name
Shows the name of the person the engineer must speak to when on site. This information is populated from Gold and cannot be edited by the engineer.

Customer Phone Number
Shows the customers phone number. This information is populated from Gold and cannot be edited by the engineer.

Customer Address
Shows the location of the customer and where the engineer should go to visit the site. This information is populated from Gold and cannot be edited by the engineer.
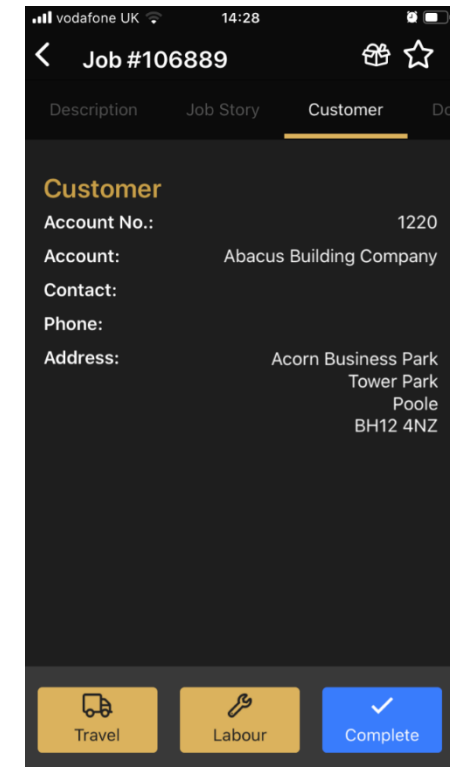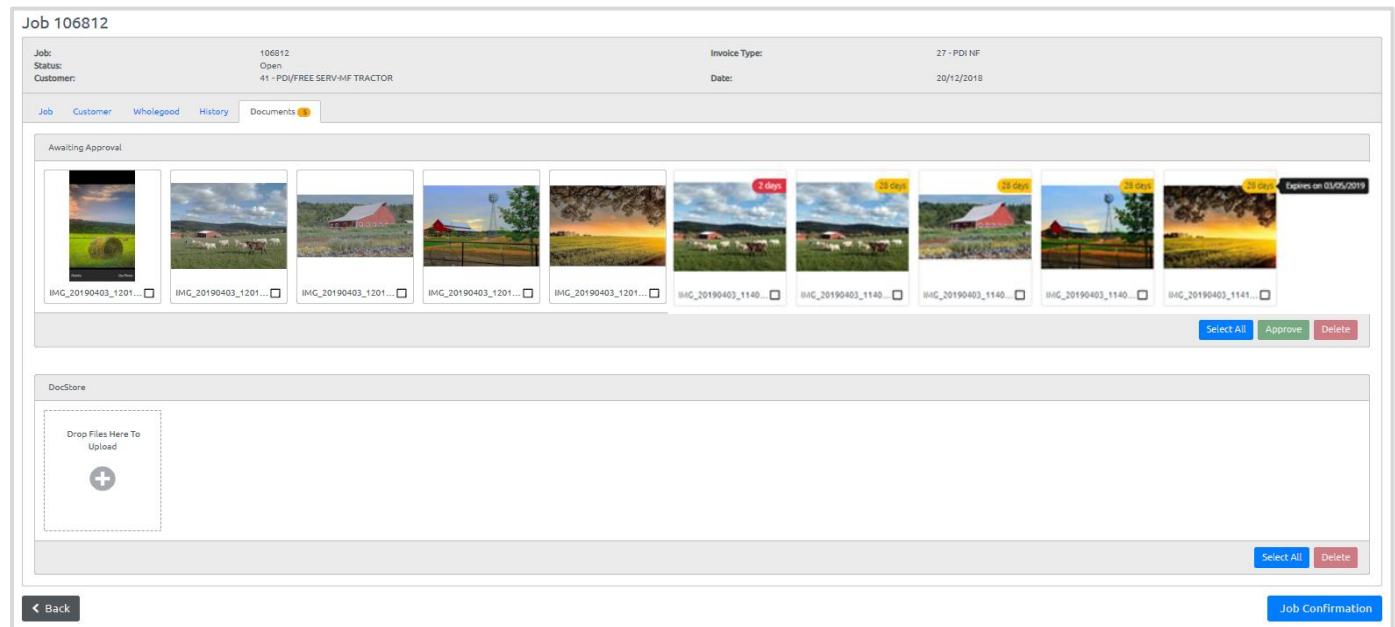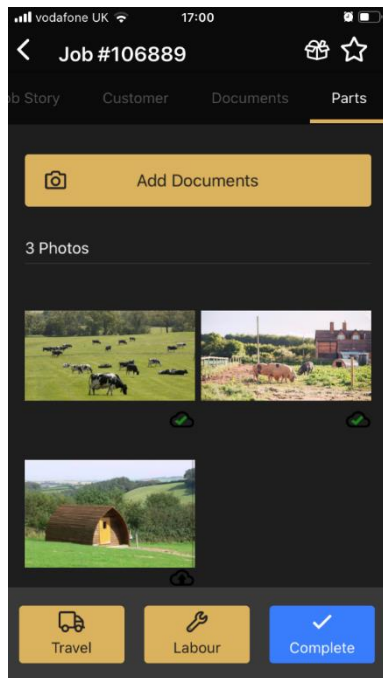
Did you know?
If you are a Gold Service 2 user, you can take advantage our feature which enables you to dial the customer phone number directly from the App. More information on this feature is shown in this manual.

Documents Tab

The Documents screen enables engineers to add images to the job in the App. They can choose to take a photo using their phones camera or add images from their existing camera roll.

All images which have been added to the job will show as thumbnails on the screen, and you can view these in 'full screen mode' by clicking on them. From here you can swipe left or right to scroll through the images attached to that job. Images are then sent to the Portal to be approved by the managers.

More information on the Images feature, and how to approve them in the Portal can be found in this manual.
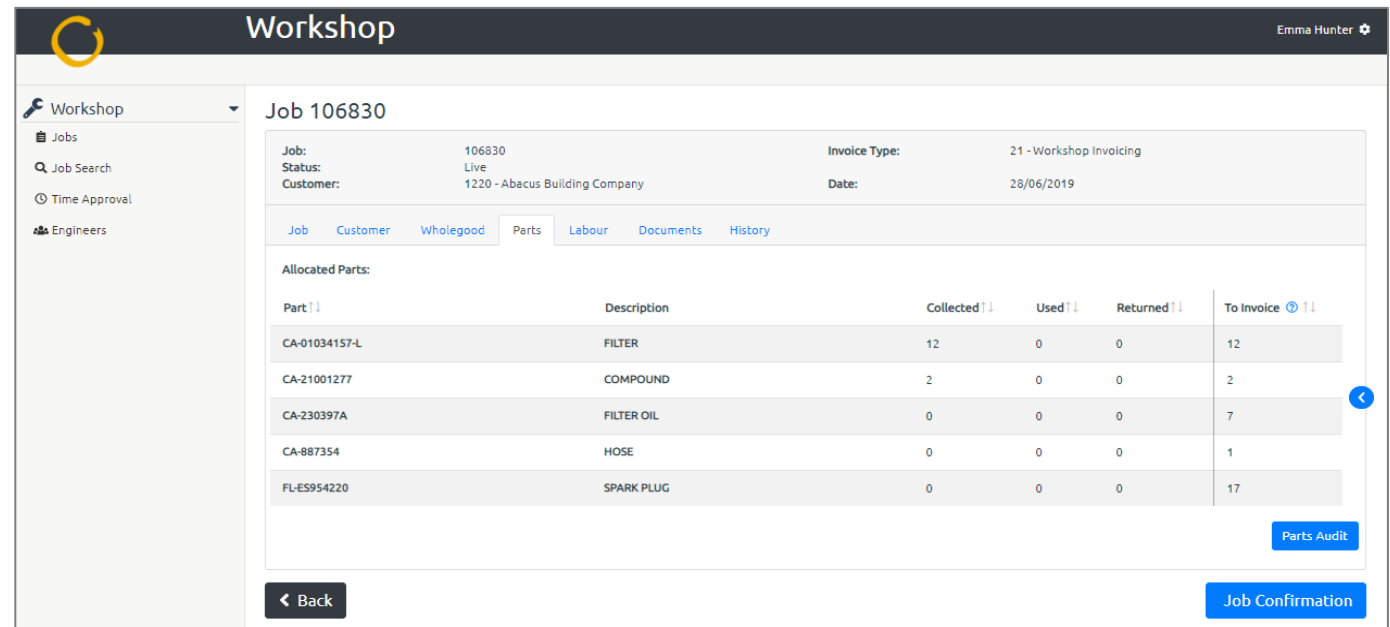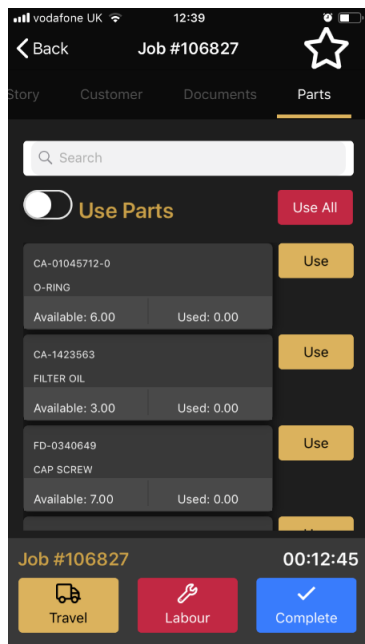

Did you know?
The Images Feature is only available to Gold Service 2.0 users. If you are not a Gold Service 2.0 user, the images tab will not appear in either the App or the Portal.

Parts Tab

Parts which are allocated to a specific job are now visible in the App for the engineer to mark as collected, used or returned. This information is then updated in the Portal. From here, managers can run a 'Parts Audit' report to keep track of these parts.

Stock can also be allocated to engineers. This is different to parts which have been allocated to a job, and instead acts as 'spare parts' for the engineer to use as and when necessary on any job. This information is then updated in the Portal, where managers can run 'Stock Take' reports and monitor the usage of the allocated parts.

This features a full audit trail of which parts have been collected, used or returned, and allows engineers to be accountable for the parts allocated. More information on the Parts feature can be found in this manual.
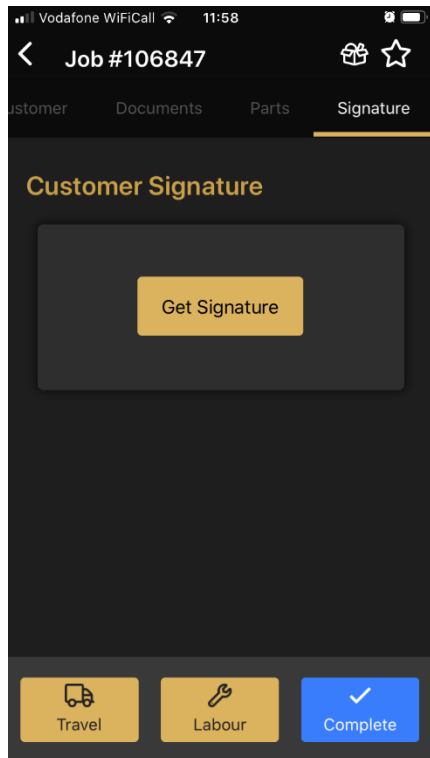

Did you know?
The Parts Feature is only available to Gold Service 2.0 users. If you are not a Gold Service 2.0 user, the Parts tab will not appear in either the App or the Portal.

Signature Tab

The signature screen allows engineers to capture the customer's 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.
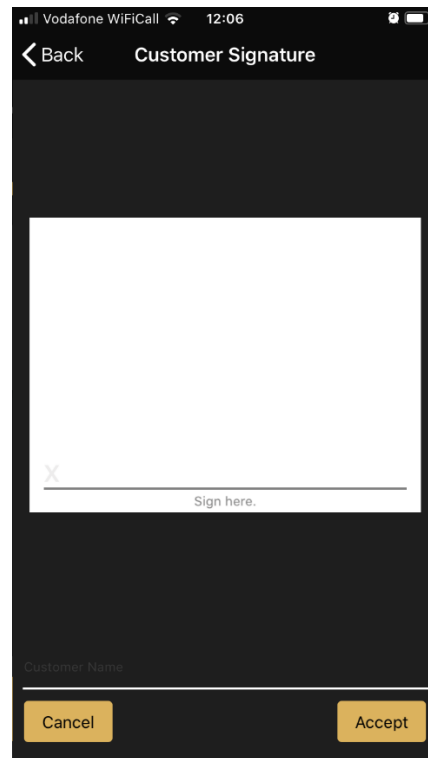
Using their finger, the customer can sign their name. When the signature has been captured, press the 'Accept' button.
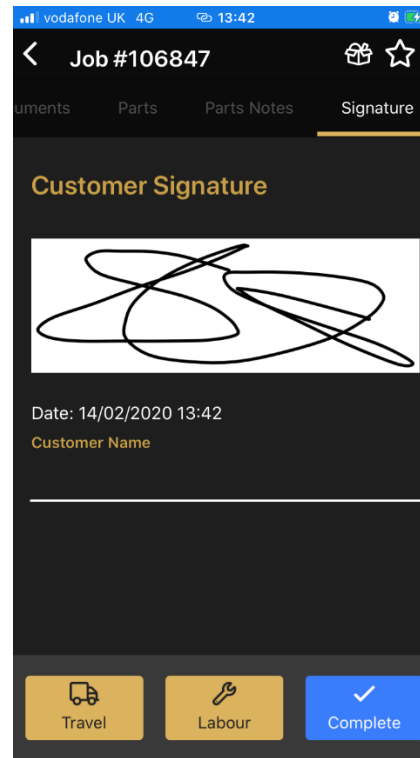
Once the customer has added their signature, click in the space under 'Customer Name' and add the customer's name.
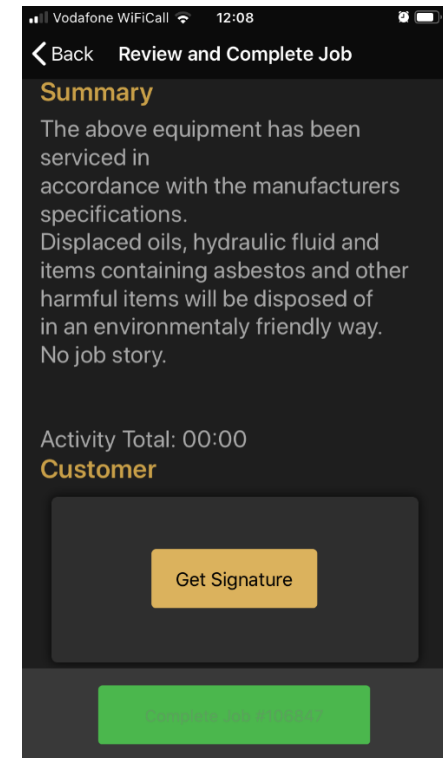
f the engineer tries to complete the job without a customers signature, they will be prompted to do so on the summary screen.

Using the App

How to log time on a job in the App

Engineers can log time on a job in the App to show how long they have taken for each activity. This information is then fed back to the portal for the manager to approve. Any comm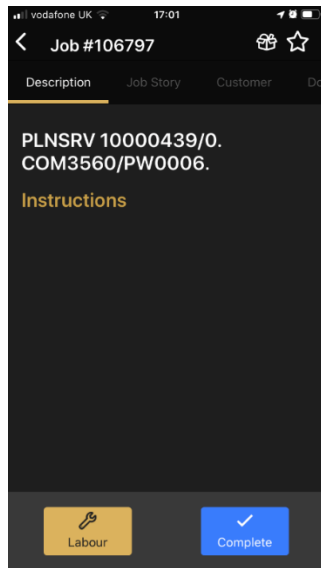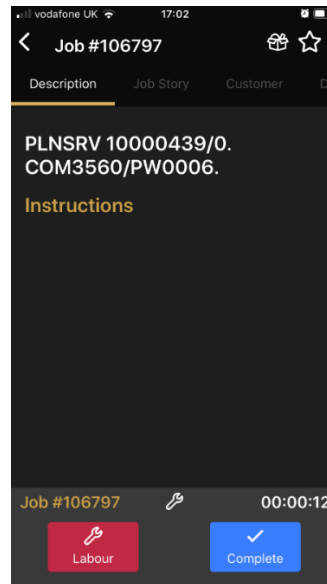ents logged against the time recorded will also show in the portal and can be found next to the labour line in the Time Approval screen.

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.
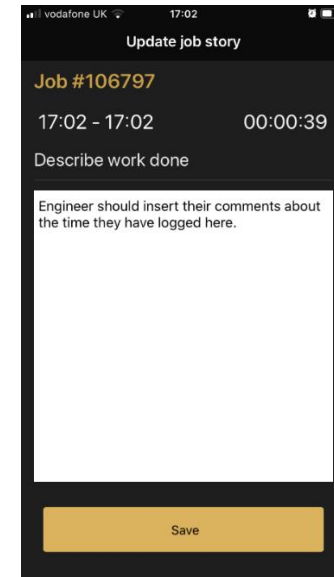
A labour comments box appears for the engineer to provide information about the time they have logged. Press the save button for this information to reach the portal.
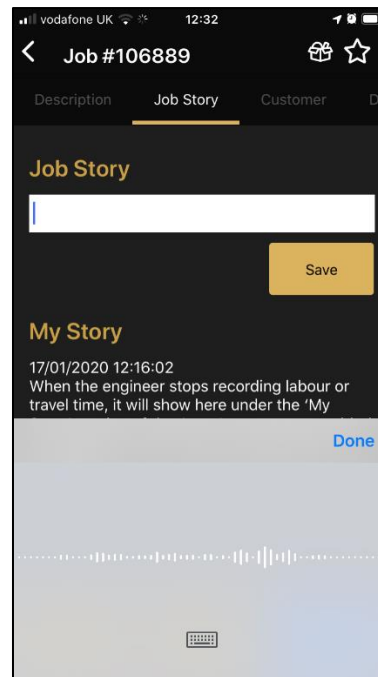
Did you know?
The labour comments should be used to provide information about the time logged – for example, if the engineer forgets to log off of a job, they can add the correct end time to these comments.

Dictating the Story Feature

Engineers can add information into the Job Story box by speaking into the microphone. This will translate their words into text, removing the need for them to manually type it 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).
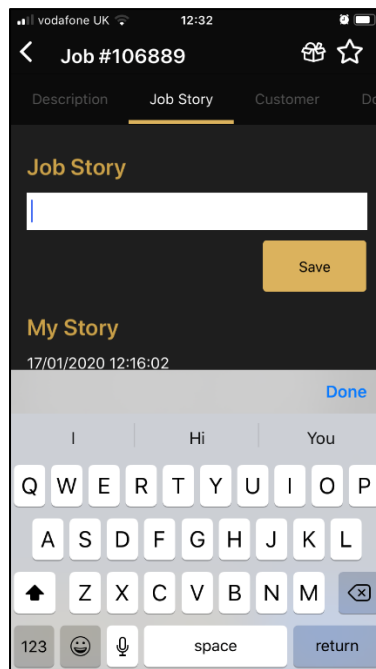
Click in the job story box to make the keyboard appear, then click on the microphone icon

Soundwaves will appear to show it is recording. Press the 'Done' button when finished
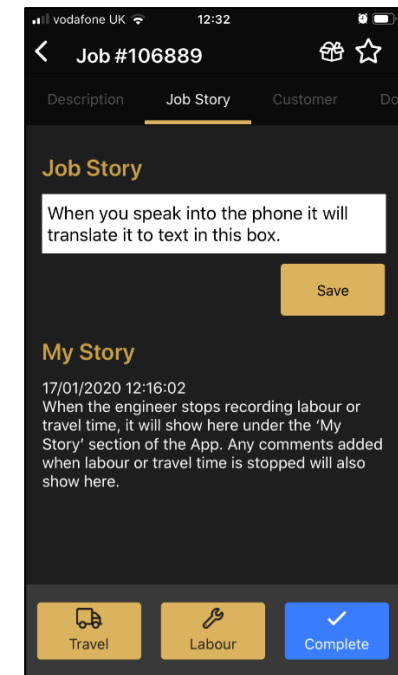
What you say will then appear in the Job Story box. Click the 'Save' button to save it

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.

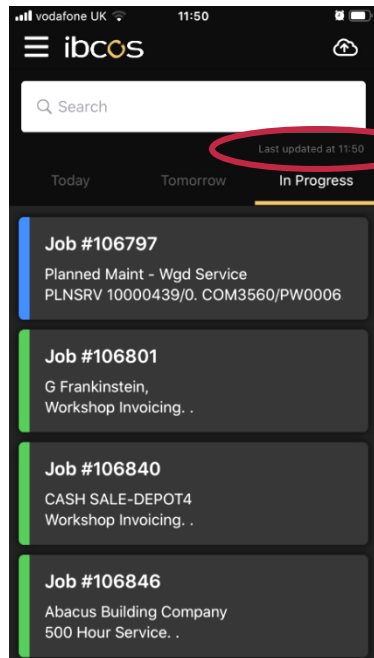## How to refresh the screen in the App

Engineers must refresh their screens on the Gold Service Mobile App to receive any changes or additions that have been made to their jobs. To help them monitor this, we have provided visibility of the last date and time the App was refreshed.

This information is visible in 2 areas of the App: 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) and can be found in the top right-hand corner of both 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
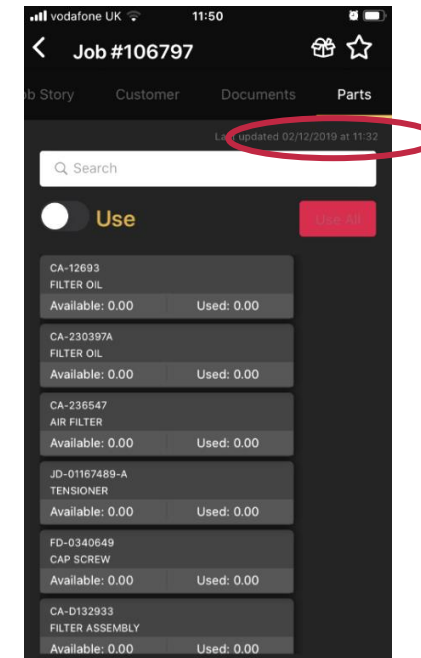
There are two ways an engineer can refresh the screen. If they are in the home screen and have no jobs in their lists, they will see a 'refresh' button. Clicking this will refresh the screen. (If there are jobs in their list, this button will not be visible). Alternatively, in any screen on the App, they can 'pull down' on the screen to refresh it. Whenever the engineer refreshes 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, so we have enabled them to be manually uploaded. We strongly advise that the engineers check their manual uploads folder at least once a day to ensure any data which has not reached the Portal is sent.
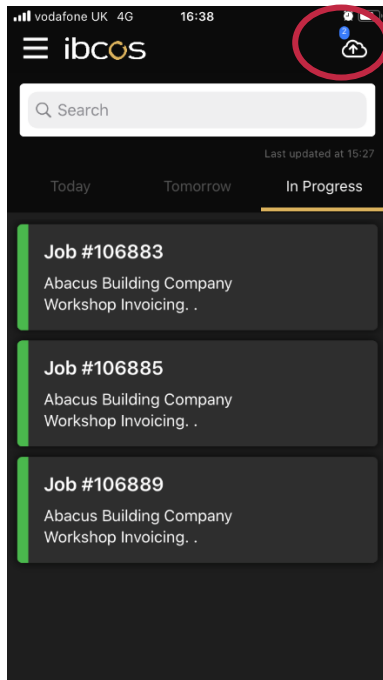
Click on the 'cloud' icon at the top right of the screen to open the uploads folder. Here you will see all the items that have failed to reach the Portal.
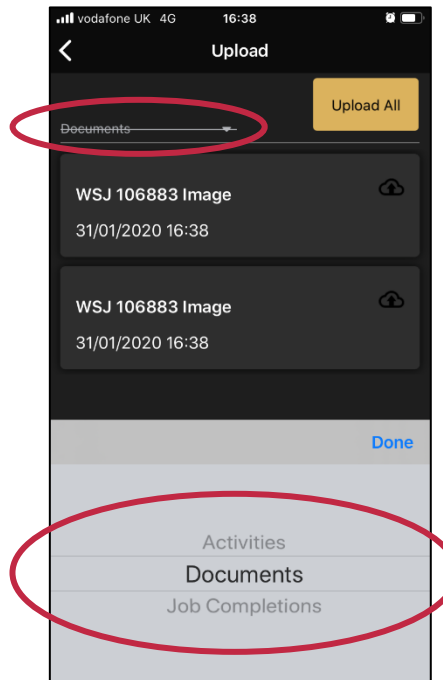
It is split into 3 areas: Activities, Documents and Job Completions. It only uploads items for the category you are in, so you must go into each category to upload items.
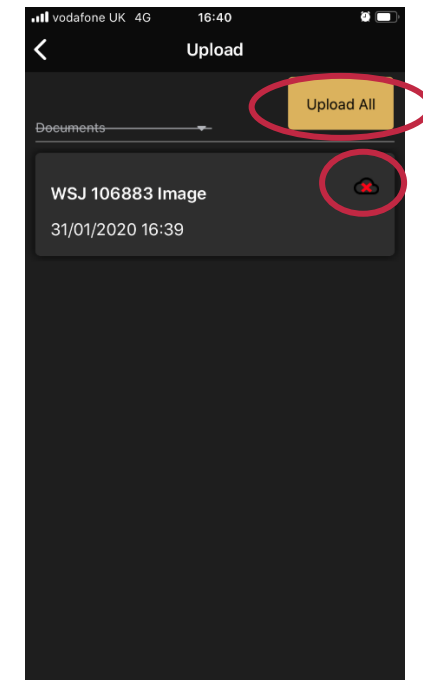
You can upload items individually by pressing the cloud button next to it. Alternatively, you can upload them all at once by using the 'Upload All' button.

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 the user to clear any user created data but will still retain the individuals log in credentials (such as their 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.

The engineer must upload any outstanding data using the cloud icon to the top right-hand side of the screen, before they use the clear data function.
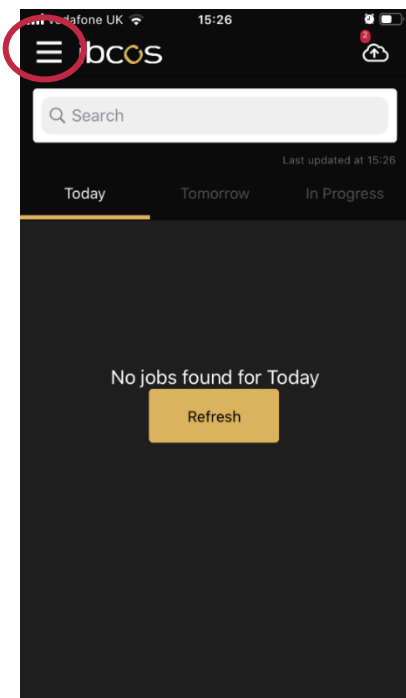
In the homescreen of the App, click on the main menu at the top left-hand side of the screen
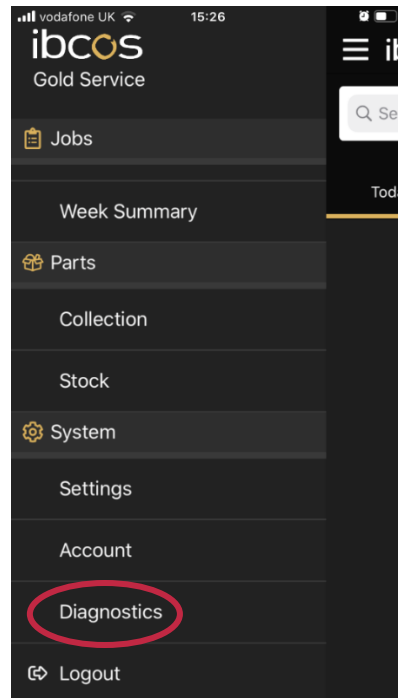
This opens the main menu. Go to 'Diagnostics' which can be found under the System section
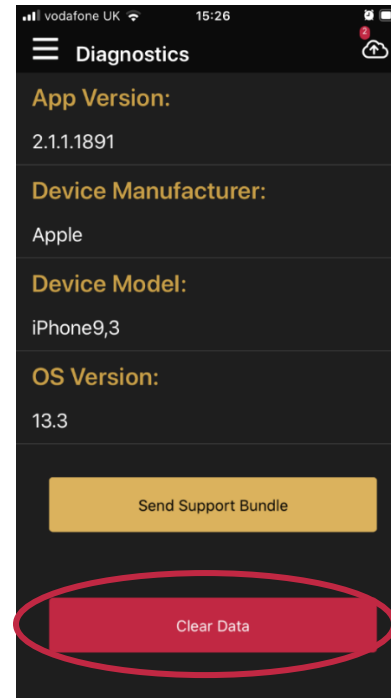
Here you will see the details of the App. The 'Clear Data' button can be found at the bottom of the screen

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

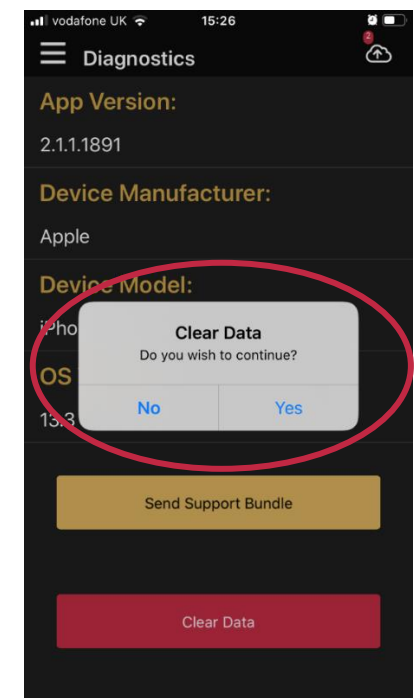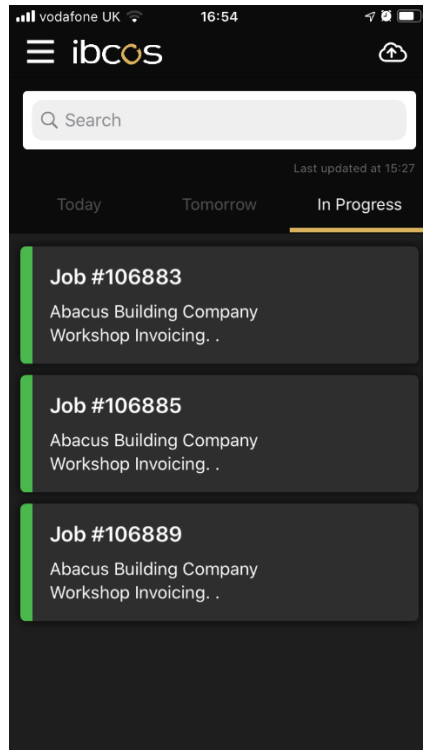## Settings for uploading items

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

In the Home Screen of the App, open the Main menu
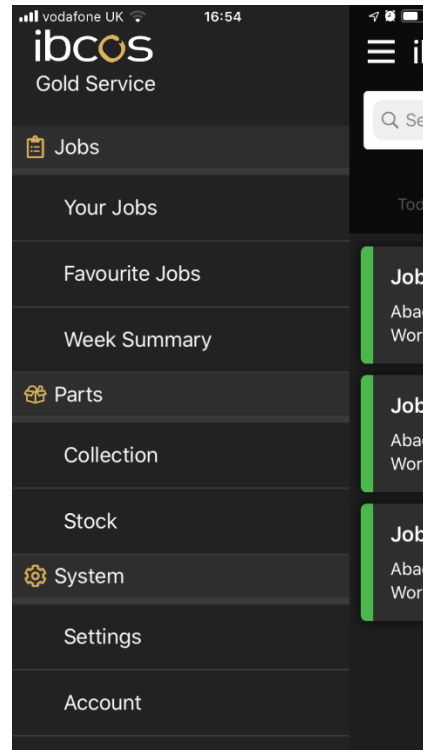
From here, click on the Settings Option to open the settings page
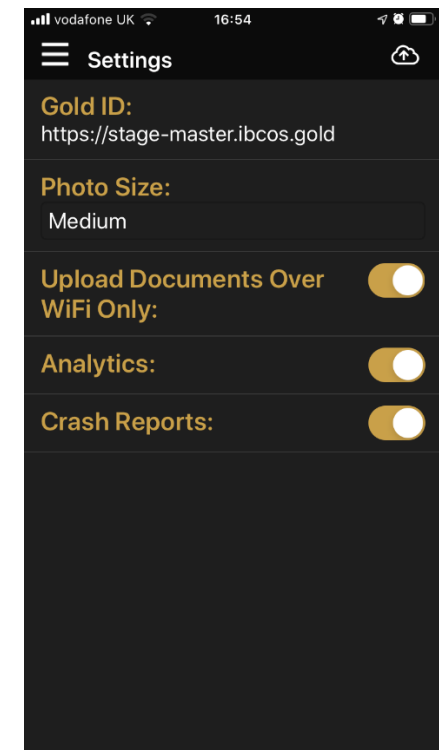
You can choose to upload over WiFi, and select the size of the photos

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

For Gold Service 2.0 users, you can now dial phone numbers from within the App. When creating the job in Gold, you can add the customer contact number. The phone number will then appear in blue underlined text in the customer screen in the App. From here, t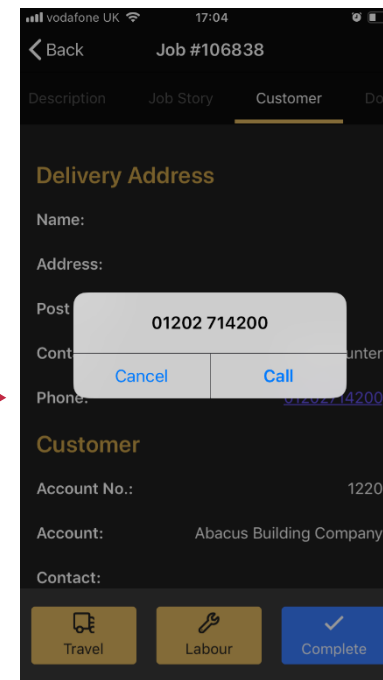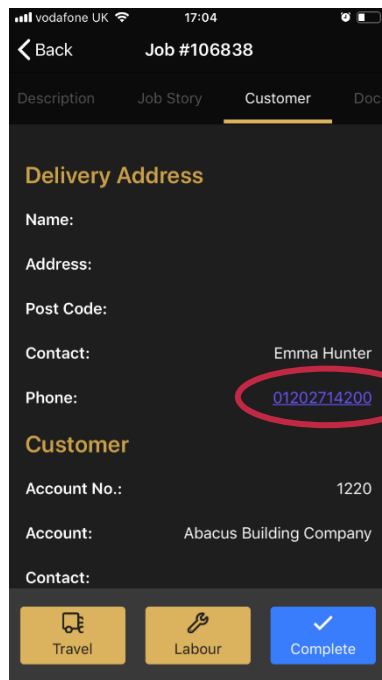he engineer can click on this number, which will open a dial screen and allow you to make the call. If the phone number is white with no underline, the link to make the call will not work. This will probably be due to the number not being input correctly within Gold.


Did you know?
If anything other than numerical values are stored in the phone number field, this function will not work. Always ensure that only numbers are used to populate a phone number when storing contact details.
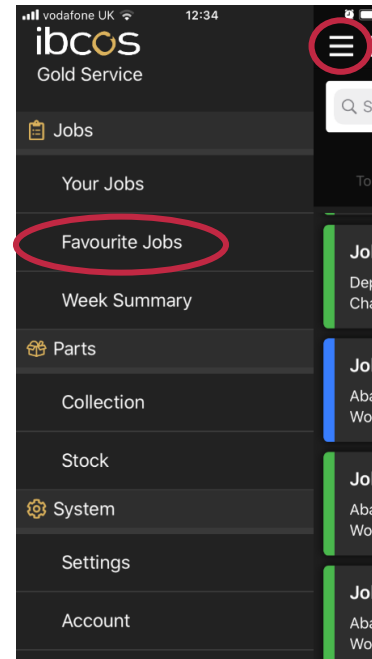
Favourites Menu

For Gold Service 2.0 users, engineers can now mark jobs as 'favourites', adding them to their favourite jobs folder. This feature has been designed to reduce the need for engineers to search for jobs that are no longer visible on their today or tomorrow screens. The process to add jobs to their favourites folder is simple:
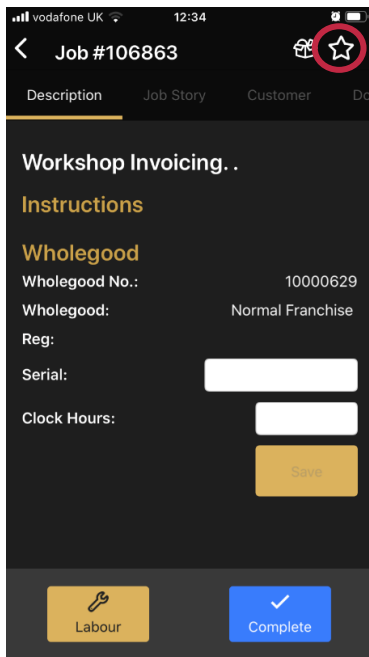
Open the job you want to add to the favourite job menu. There will be a star in the top of the screen.
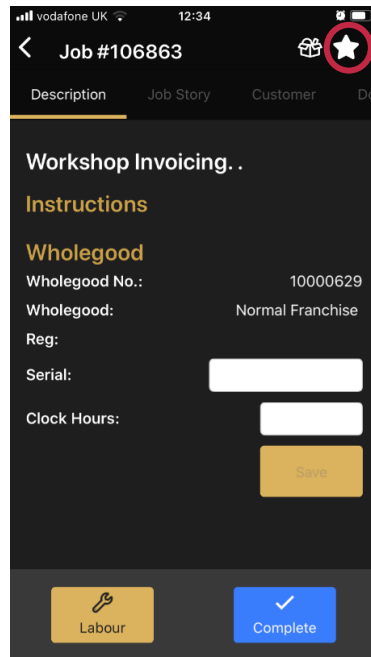
Click on it and It will turn white. This means that the job has now been added to the favourite jobs folder.

Go to the home screen and click on the menu at the top of the screen. You will see the favourite jobs folder.
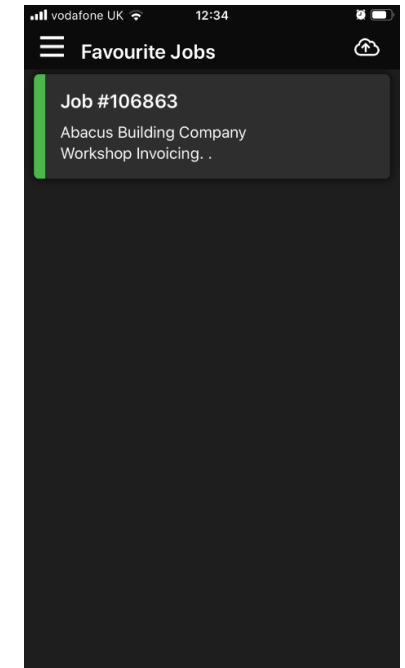
In this folder will be a list all of jobs marked as 'favourite'. Open the jobs by clicking on them.
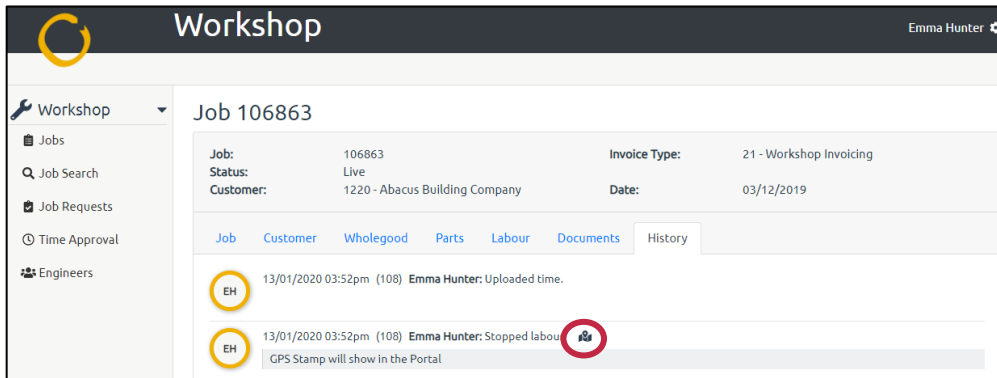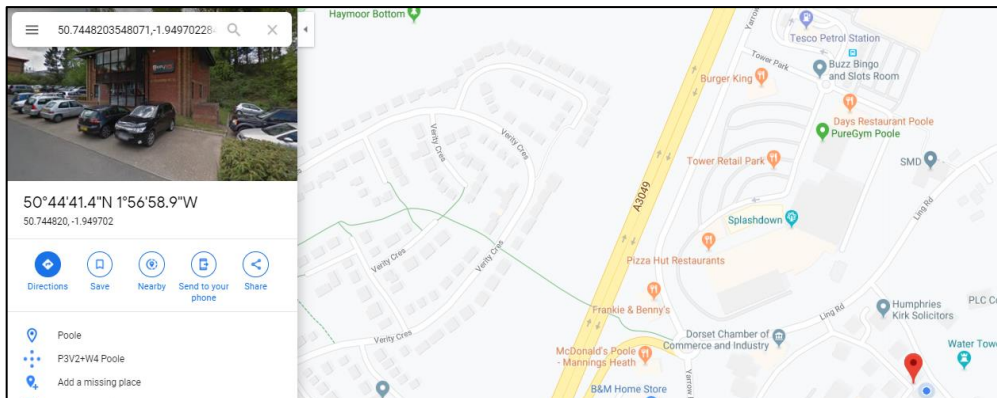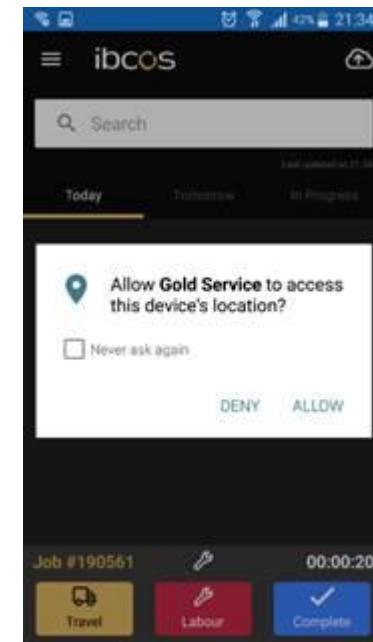
Did you know?
To remove a job from the favourite job menu, simply open the job, and click on the star again. When it turns black with a white outline, it will have been removed from this list.

GPS Stamp Location Feature

For Gold Service 2.0 users, you will be able to see the location of the engineer when they start and stop logging time. To see this information, go to the History tab within the job. Next to any 'stopped labour' entries, you will see this icon:

Did you know?
Engineers must grant Gold Service permission to access their devises' location for this feature to work. They will be prompted to do so when they start logging time on the App. They can choose to deny this request and tick the 'never ask again' box. To undo this, you can go into the App permissions on the device, turn the location flag back on, and then log out and back in to the App again. When they start logging they will be prompted to grant Gold Service permission again.

Add images to jobs in the App

For Gold Service 2.0 users, you can now add images to jobs in the App via 2 methods: taking a photo directly in the app or choosing one from your camera roll.

Please note: if it is your first time using this function, you will see a message appear on the screen asking you if Gold Service can access your photos. Please press 'ok' to this option.

All images which have been added to the job will show as thumbnails on the screen. If you click on a thumbnail, it will open the image in 'full screen mode', and from here you can swipe left or right to scroll through all images attached to that job.

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:

This symbol indicates the image has not yet been sent to the Portal

This symbol shows the image has attempted to reach the Portal, but it has failed

This symbol shows the image has been sent to the Portal successfully
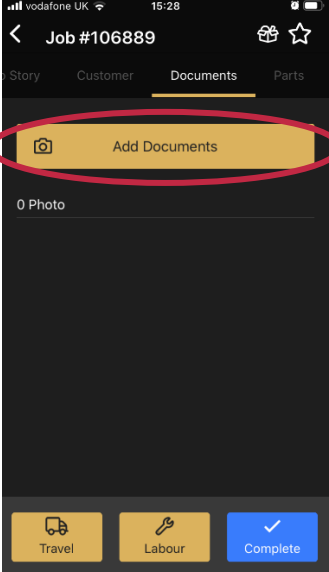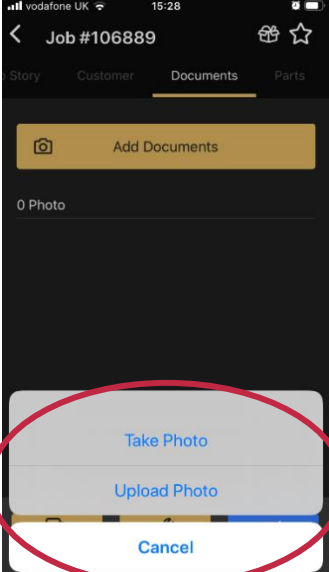
Approve images in the Portal
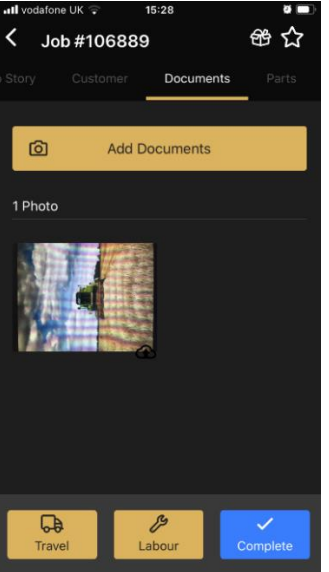
Once the images have reached the Portal, they will need to be 'approved' to enable you to send them to the Docstore. All images will sit on the portal for a maximum of 30 days, before they are removed. If they have not been sent to the Docstore within this time, they will disappear completely. Note: Sending the images to the Docstore is subject to a Docstore being licensed. If you do not have one licensed, you will not be able to save any items within the Docstore.

Did you know?
You can choose to send images to the portal over WiFi only in the settings on the App. This will then send images to the Portal if you have connection. If there is no Wi-Fi they upload as soon as there is connection. If you untick this option, images will be sent using the phones data. The Images then stay in the Portal for 30 days. If they are not sent to the Docstore in this time, they will disappear.

How to 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 there is Wi-Fi connection, all images will be sent to the portal as soon as they have been added to the job. If there is no Wi-Fi connection, the images will sit in a queue and will be sent as soon as connection is available. 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

Approve images in the Portal

When an image has been uploaded to the Portal, you will see a yellow 'document' icon next to the job. This indicates it has documents awaiting approval. This icon will disappear once you have approved all the documents.

In the job, you will see a new Tab called 'Documents'. If you have images or documents that require your approval, you will see a yellow circle with the number of outstanding items shown in it. When all the documents have been approved, the yellow circle will disappear.

Did you know?
Images stay in the Portal for 30 days. If they are not sent to the Docstore in this time, they will disappear.

In the Documents tab, the screen is split into 2 sections: 'Awaiting Approval' and 'Docstore'. Items in the 'Awaiting Approval' section have not yet been sent to the Docstore. **Note:** Documents will only be held in the 'Awaiting Approval' section for a total of 30 days. If you have not sent the items to the Docstore within that time, they will disappear from the Portal. Sending the images to the Docstore is subject to a Docstore being licensed. If you do not have one licensed, you will not be able to save any items within the Docstore.

Images will show as thumbnails and when you click on an image, it will open in 'full screen mode'. From here you can scroll through all the image within that section of the screen.

Each thumbnail in the 'Awaiting Approval' section will have a yellow bar across the top of it showing the number of days remaining until it will expire. When it reaches 7 days or less, this bar will turn red. If you hover over this bar with your mouse, it will show the exact date that the image will expire and be removed from the Portal. The bar will disappear once the image has been approved and sent to the Docstore.

If you hold the mouse over each thumbnail, you will see a blue arrow appear in the bottom right hand corner of the item. Clicking on this arrow allows you to download the item to your computer.

Next to each thumbnail, you will see a 'tick box'. Selecting it will allow you to complete an action on that image using the buttons shown on the screen:

Select All	The 'Select All' button allows you to select all the thumbnails within that section of the screen
Approve	The 'Approve' button sends all selected thumbnails to the Docstore. Once this has been done, the selected thumbnails will move to the 'Docstore' section of the screen
Delete	The 'Delete' button allows you to delete all the selected thumbnails within that section of the screen

Once you have actioned all the items in the 'Awaiting Approval' screen, 3 things will happen:

- The split screen will disappear, and you will see one screen with thumbnails of all the documents that have been sent to the Docstore
- The document icon on the home page of the portal will disappear from that job 📄
- The yellow circle on the documents tab will disappear 5

Note: In this screen you will see a blank image box with a ⊕ symbol in the middle of it. When you press this, it will open up the documents folder on your computer and allow you to upload an image or document from your saved files.

Click on this box to upload items from your computer. You can also drag and drop items onto this section

Click on the tick boxes to select the images. To select all images at once, click the blue 'select all' button to the right

The yellow expiry bar shows the number of days until the image expires. It turns red with 7 days or less remaining.

If you hover over the expiry bar, it will show the full date of when the image is set to expire

Did you know?
If you hover your mouse over an image, you will see a blue arrow appear. Click on this arrow to download the image to your computer.
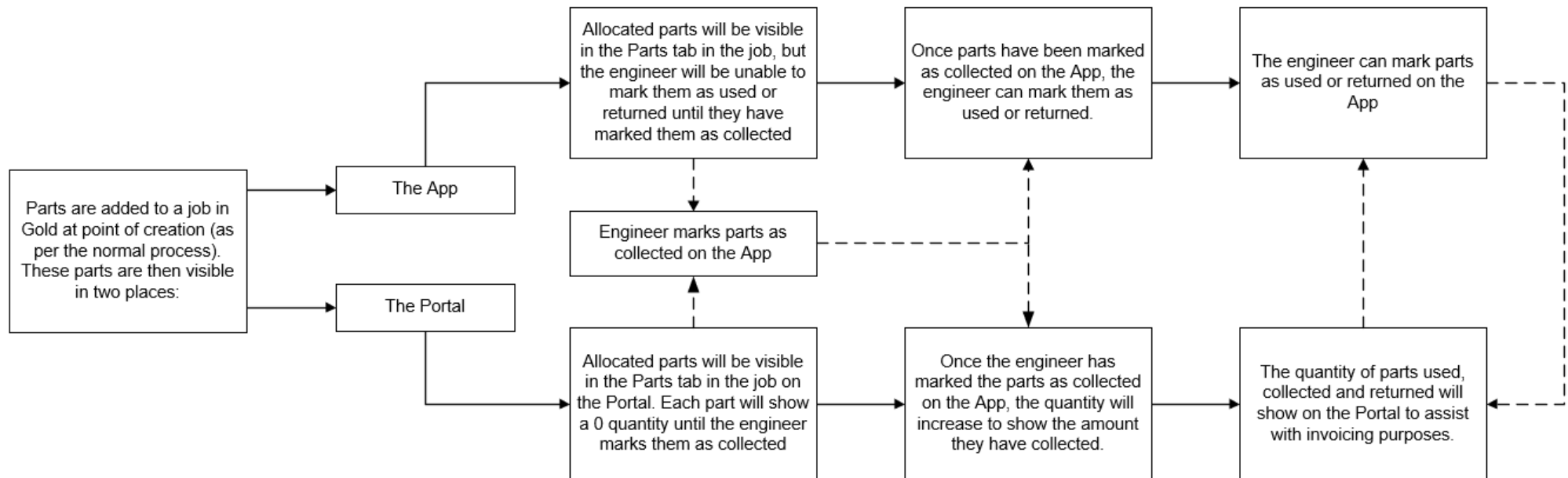
Parts Feature

Our Parts Feature allows Engineers to mark parts as collected, used and returned on the App, and this information will feed back into the Portal where the managers can view this information for invoicing purposes, as well as creating stock take reports of the parts for auditing purposes.

When parts are allocated to a job in Gold, they will be visible in 2 places: The App and The Portal.

The App: The engineer will see the list of parts within the job on the App. However, until the engineer marks the parts as collected on the App then, although they will see them on the job, they will not be able to do anything with them. Once they have marked them as collected, they will be able to mark them as used or returned.

The Portal: The list of parts will be visible within the job on the Portal. However, until they have been marked as collected on the App, the collected, used and returned quantities will show as zero. Once parts are collected on the App, the collection quantities will increase accordingly, and when they are marked as used or returned in the App, the quantities in the used and return columns in the Portal will increase accordingly.

This flow chart shows the process for the Parts feature.

Parts Feature – Portal Overview

To see parts that have been allocated to a job on the Portal, open the job and click on the Parts tab. This page shows all parts collected, used, and returned and the information can be useful for invoicing purposes. You will see a 'Parts Audit' button to the bottom right hand side of the screen. This will provide a read only report showing an audit trail of the parts.

Before the engineer has marked the parts as collected on the App, the quantity for each part will show as zero. Data is only shown for parts that have been marked as collected. If you allocate 10 parts to the job but the engineer only marks 7 as collected on the App, the data on this screen will only include those 7 parts. We recommend the engineer marks all parts allocated as collected when they start the job, and then marks them as used or returned as necessary.

If the engineer uses parts from their Van Stock, it will show on this screen. If they use parts which are the same as a part already allocated to the job, the quantity of that part line will increase accordingly. If they allocate parts which have not already been allocated to the job, the data will show as a new line.

If you want to add any notes in relation to these parts, you can do so by clicking the blue arrow to the right-hand side of the screen. This opens a notes section where you can store information.

Parts Feature - Engineers Screen (Stock Tab)

The Stock Tab will show you all the stock allocated to the engineer. Before you can allocate stock, you will need to assign a Van Stock job to them. You can do this by either creating a new Van Stock job, or by allocating an existing Van Stock job to them.

To create a Van Stock job (1), choose a number in the Stock Job ID tab, and the Stock Account that you want to allocate the stock to. If the Stock Job ID is already taken, the box will go red and you will not be able to press the 'create' button. Choose a number that is available, and the box will go green allowing you to click on the 'create' button to proceed. To allocate the stock to an existing Van Stock job (2), simply pick the existing job from the drop-down box and click the 'Assign' button.

Once a Van Stock job has been assigned, the engineer will need to log out of the app and log back in again for it to take effect. Once you have allocated a Van Stock job to that engineer, you will not need to do it again, and they can use the same Van Stock job forever. However, should you allocate a new Van Stock job to an engineer (replacing the old one), then they will need log out of the app and log back in again for it to take effect.

Did you know?
Certain criteria must be set up in Gold to allow the Van Stock module to work correctly. This will be handled by an Ibcos representative during set up.

Parts Feature - Engineers Screen (Stock Tab – View allocated Van Stock)

Once you have assigned a Van Stock job to an engineer, you will be able to see all stock allocated to them. To do this, click on the Stock Tab. You will see 2 buttons to the right of the screen: Unassign and Stock Take.

If you click the 'Unassign' button, it will revert back to the Van Stock set up screen (shown on the previous page of this manual), and you will need to assign a Van Stock job to the engineer again before you can allocate stock to them.

If you click the 'Stock Take' button, it will open a PDF report of all stock allocated to that engineer.

You will see a 'Parts Audit' button to the bottom right hand side of the screen. This will provide a read only report showing an audit trail of the parts.

Please note: Both the stock tab and the Stock Take report are for viewing purposes only and cannot be amended.

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
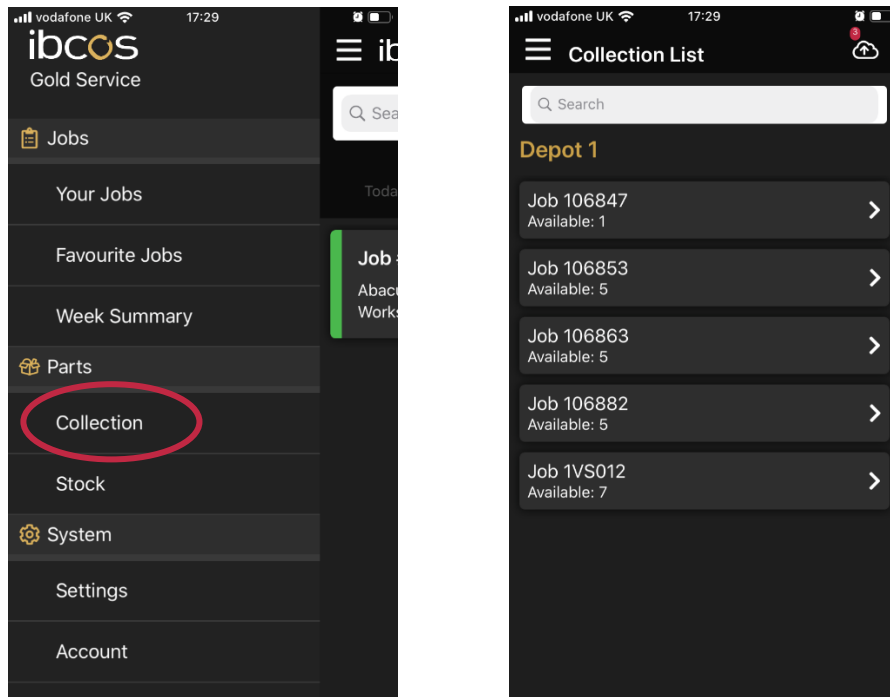
STOCK SCREEN

The 'Collection' screen shows all parts specifically Allocated to a job which need to be marked as collected before they can use them on the job.
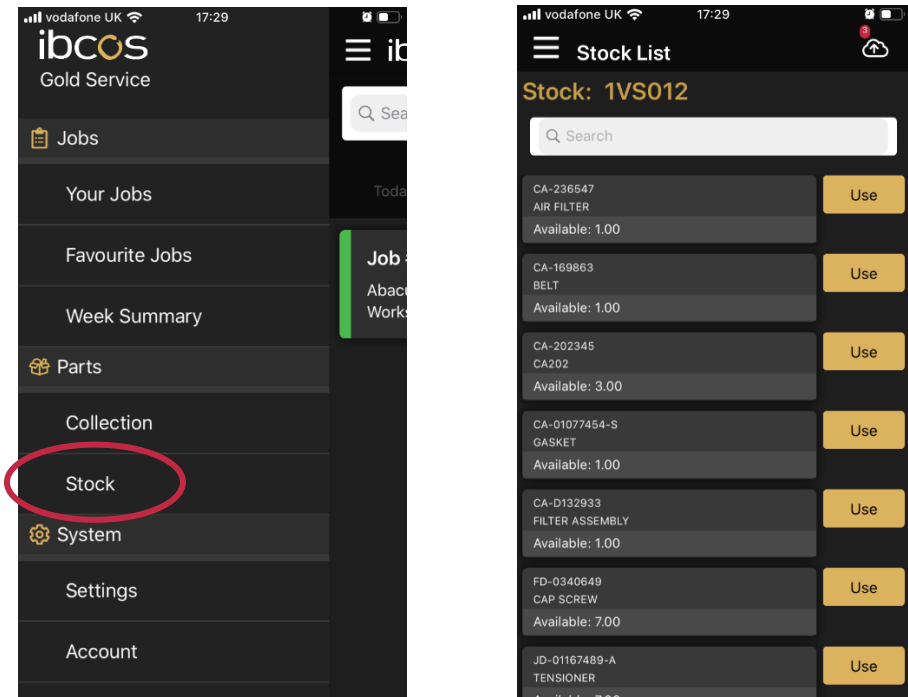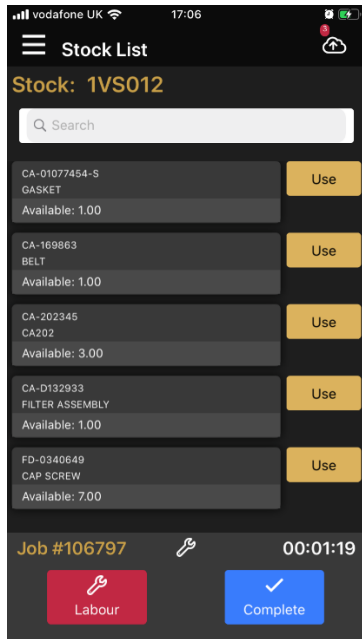
The 'Stock' screen shows a list of the engineers personal Van Stock, which is available for them to use as and when necessary against any job.

## Parts Feature – Allocate stock to a job on the App

You can allocate parts to a job from your personal Van Stock. Open the menu in the left-hand side of the screen to open the side 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.
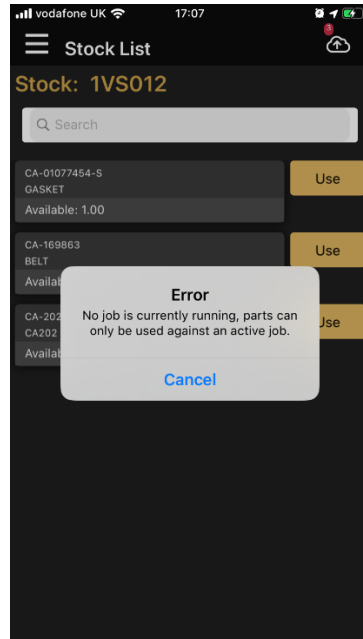
You can only allocate stock to a job if you are logging time against it. If not, you will see an error message appear which says: 'No job is currently running, parts can only be used against an active job'.
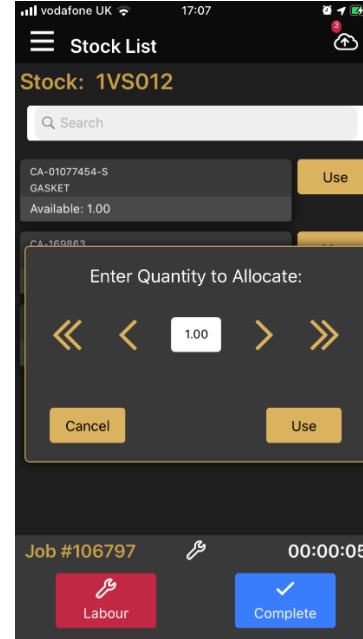
Open the job you want to allocate stock to and start logging time. Go back to your stock and select the parts you need. Press the 'Use' button, choose the amount you want to allocate and press 'Accept'.
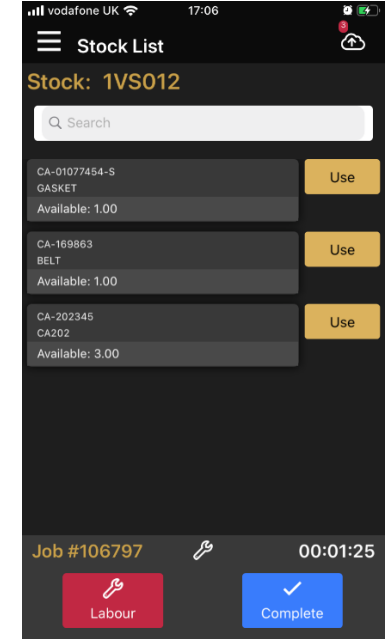
The available quantity will decrease to reflect the amount used. Once the full quantity of the part is used, it disappears from the screen entirely. Allocated parts are now available on the job.

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

## Parts Feature – Mark parts as collected on the App

The engineer will see the list of parts allocated to the job on the App. However, to be able to use these parts on the job, the engineer 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
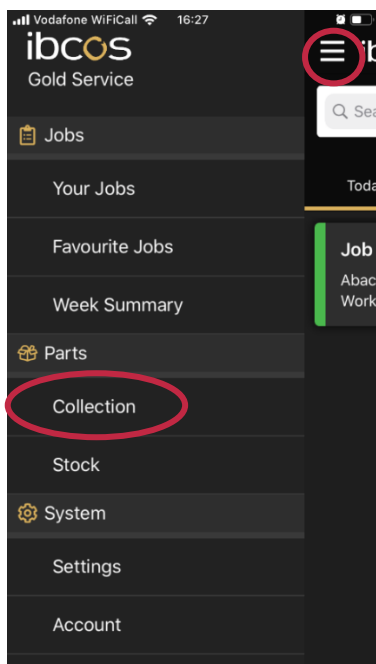

To mark parts as collected, click on the menu at the top of the screen to open the side menu. From here, click on 'Collection' option in the 'Parts' section.
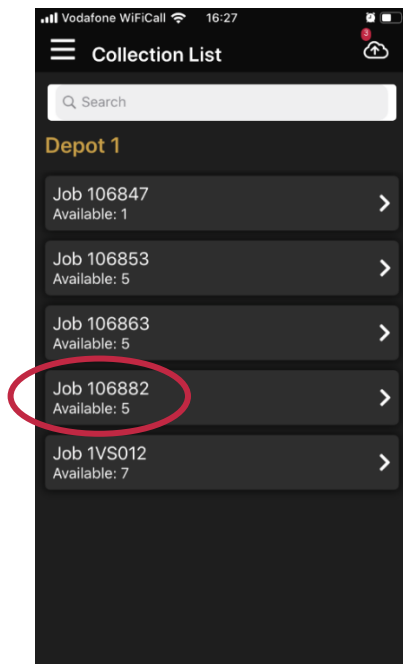
This opens a new screen and will show all the jobs which have parts awaiting colleciton. Click on the job you want to to open the parts collection screen.
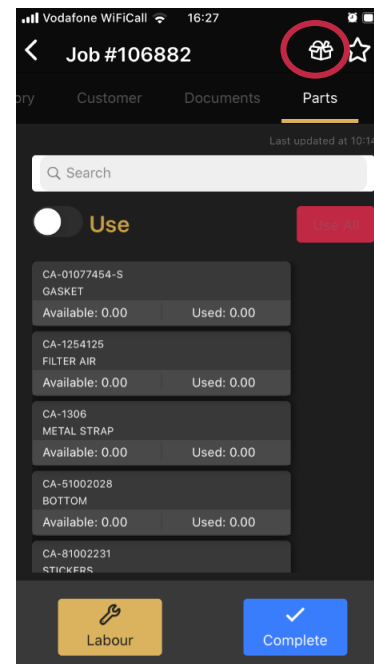
Alternatively, you can jump straight to the collection screen from the job by pressing the 'box' icon at the top of the screen. This will take you directly to the collection screen.
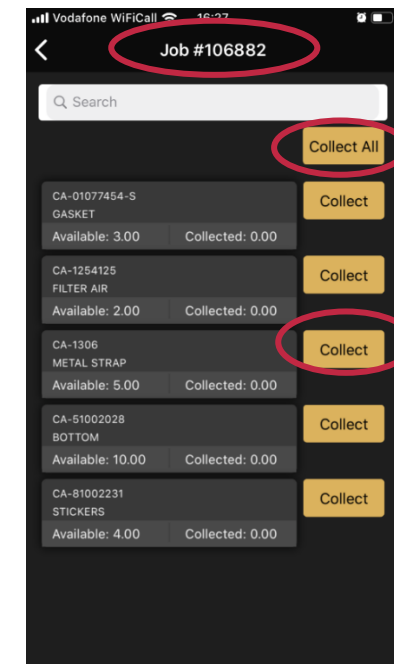
Collect parts individually, or collect all parts at once by using the collect all button. Note: once you have marked parts as collected you cannot undo this.

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

## Parts Feature – Mark parts as used on a job in the App

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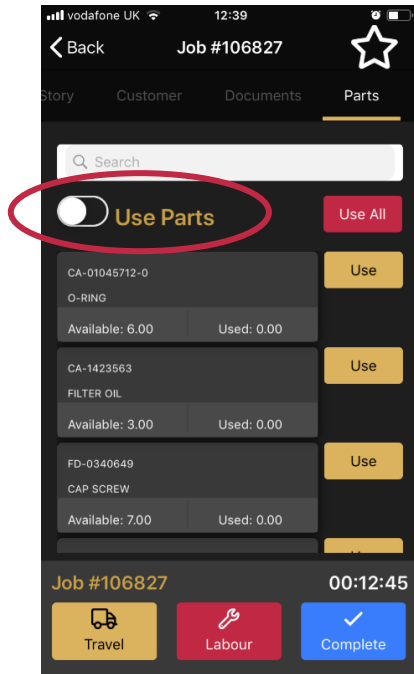

In the job, scroll to the 'Parts' tab to see all parts allocated to the job. Switch between the 'Use' and 'Return' screen by clicking the toggle button.
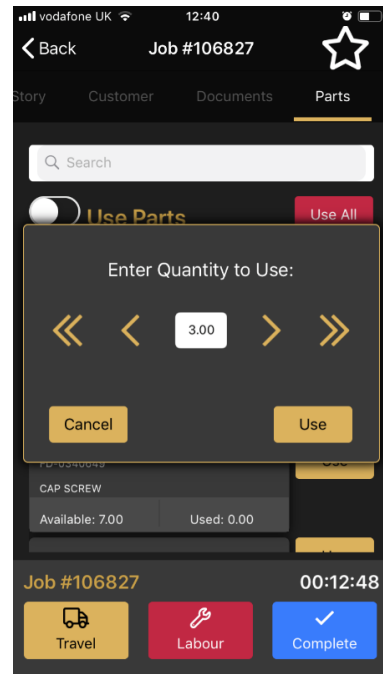
To use a part, press the 'Use' button, choose the amount you want then click 'Use'. The quantity and available numbers will change to reflect what has been used.
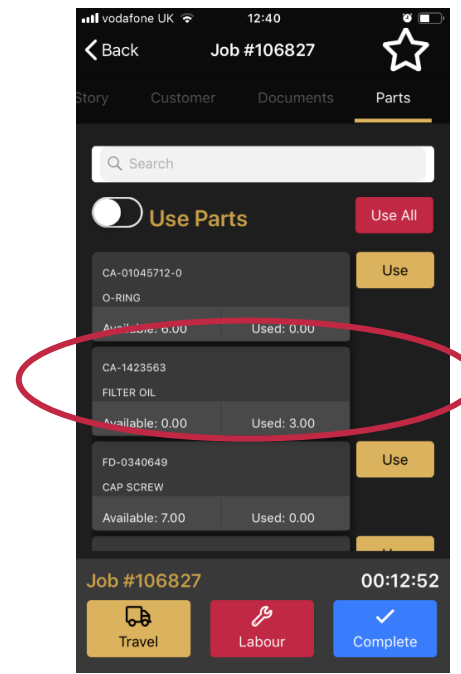
When the total quantity of the part is used, the use button disappears. Note: Once you use a part in the app you cannot undo it – this will have to be done in the Gold.
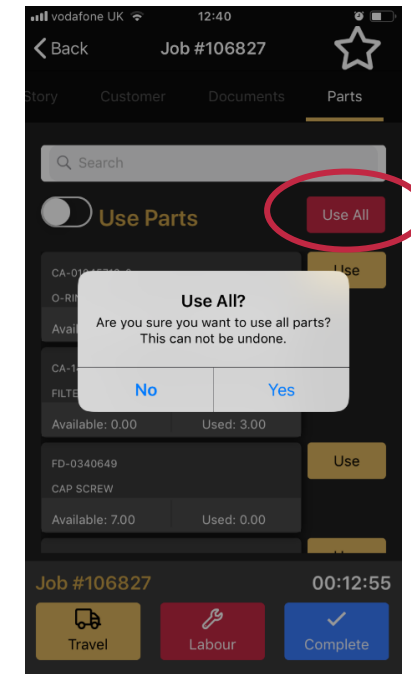
To use all parts at once, press the 'Use All' button. A message will appear asking if you're sure you want to use all. Remember, this action cannot be undone in the App.

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
If you don't assign a Van Stock job to an engineer, they will see the list of parts on the job but will not be able to do anything with them.

## Parts Feature – Mark parts as returned on a job in the App

Any parts that are not required on the job should be marked as returned by the engineer in the App. This will then show in the Parts Tab 'Returned' column on the Portal. All returned parts will be returned to the engineers Van Stock, and not into the Gold Stock.
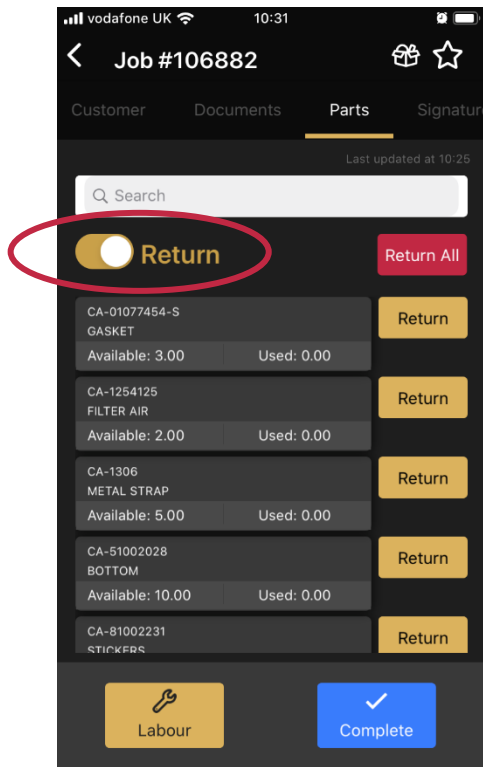

Make sure you are in the return screen by pressing the toggle button at the top of the page. Find the part you want to return and click the 'Return' button.
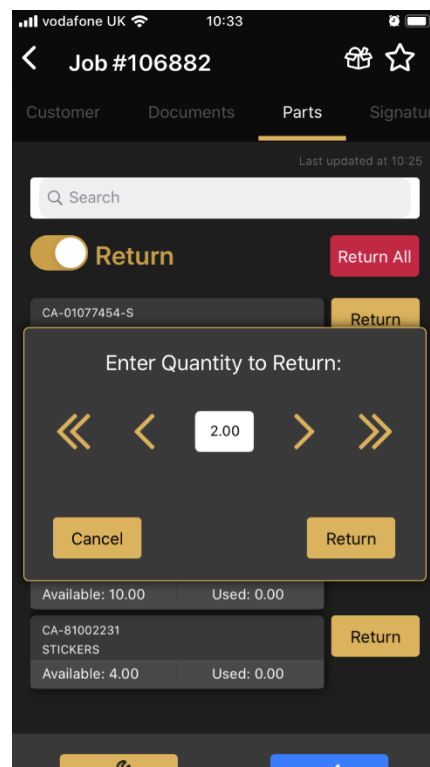
Choose the amount you want to return and then click 'Return'. The quantity and available numbers will change to reflect what has been returned.
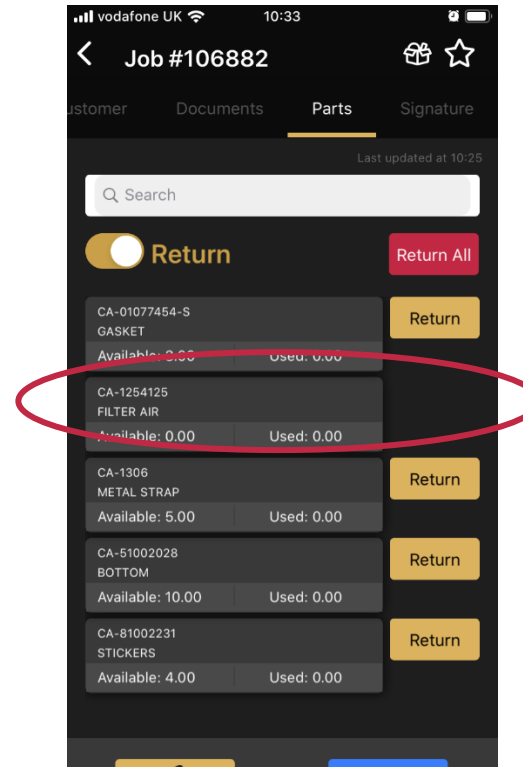
When the total quantity of the part is returned, the return button disappears. Once you return a part in the app you cannot undo it – this will have to be done in the Gold.
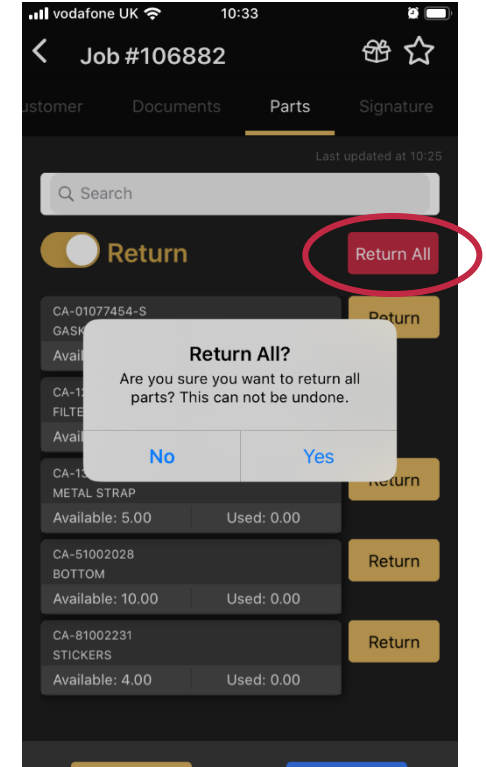
To return all parts at once, press the 'Return All' button. A message will appear asking if you're sure you want to return all. Remember, this action cannot be undone in the App.

## Parts Feature – 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.
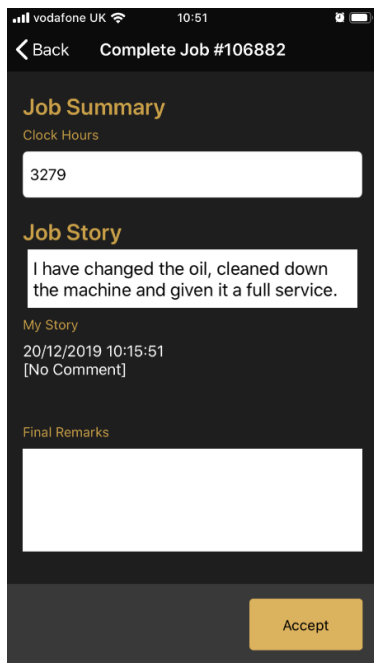

When the engineer is ready to complete the job, they should review the information entered and then press the 'Accept' button as per the current process.
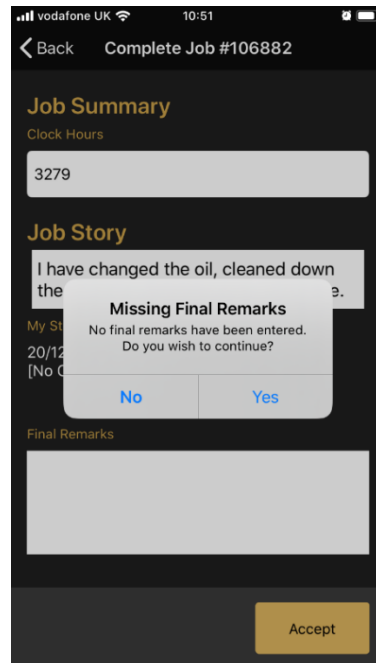
If the clock hours or final remarks have not been entered, a message will appear asking if you wish to continue. Click the 'Accept' button if you are happy to continue.
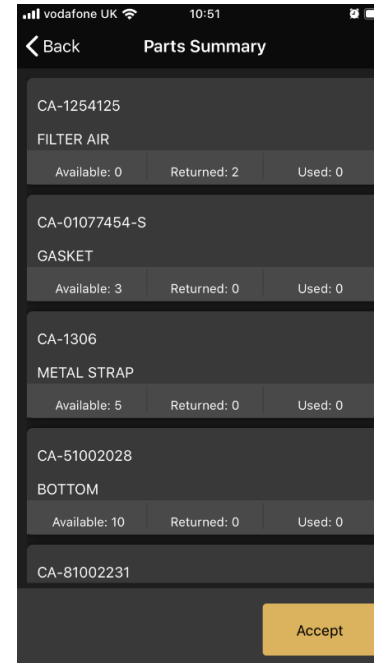
This will open a 'Parts Summary' screen which shows a list of all the outstanding parts on the job and their status (available / used / returned). Press the accept button.
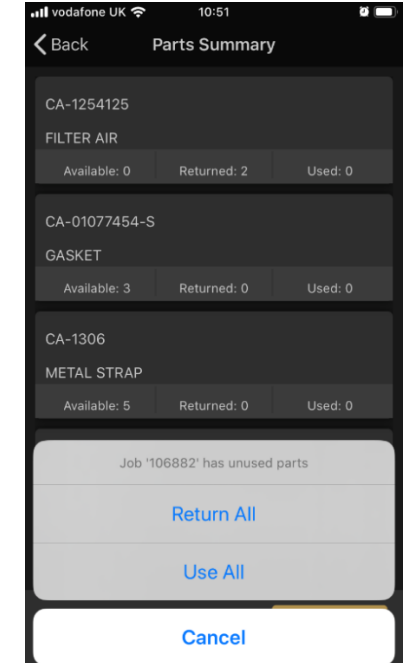
A pop up will appear prompting you to 'Return All' or 'Use All' of the outstanding parts. This action ensures all the parts allocated to that job have been accounted for.

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.