



DICE Products & Technical Documentation

Mobile Service

DICE Corporation | 1410 South Valley Center Drive | Bay City, MI 48706 USA | **Phone:** 989.891.2800 | **Fax:** 989.891.2801

dicecorp.com

Copyright © 2017 DICE Corporation. All Rights Reserved



DICE Corporation
Technology Park
1410 South Valley Center Drive
Bay City, MI 48706

1-800-RUN DICE
989-891-2800 | International
989-891-2801 | FAX

info@dicecorp.com

Revision: 16-ee01003f95ca6ea2dac2d50aa12e8191

© 2014 by DICE Corporation. All rights reserved for use in the DICE Corporation Documentation Department. Reproduction, adaptation, or translation without written permission is prohibited, except as allowed under the copyright laws. All of the trademarks, service marks, registered trademarks, names, products, and services mentioned in this document are the property of their respective owners, vendors, or organizations. The proprietary and confidential information in this document is subject to change without notice. DICE Corporation software, products, services, and policies are revised as needed. If the information contained in this document does not match the specific design of a DICE system or arrangement of system options, the system may contain customized programming and features, exhibit differences in functionality and appearance resulting from variations to default setup and configuration parameters, run on a different software release-upgrade or software build, or incorporate advance-release features, patches to builds, or other third-party or special-release DICE software packages. Please direct any comments or questions about this document to the DICE Corporation Documentation Department. Please direct comments and questions about DICE software systems to the appropriate department in DICE Corporation Support.

Table of Contents

Table of Contents	3
Mobile Service	4
Installation and Setup	4
Logging In	4
Using the Filter Bar	5
Selecting a Ticket	5
Refresh Tool	5
Ticket Search	6
Future Ticket Search	7
Tabs, Functions, and Search	8
Using the Navigational Toolbar	8
Home Screen and Navigational Toolbar	9
Using the Help Option	9
Video Tutorial	10
Documentation	10
Time Sheet	11
Home	12
Switching the Account On/Off Test	13
Map and Site Contact Information	13
Map	14
Edit	15
Adding an Email Address	17
Deleting an Email Address	17
Contacts	18
Adding Premises and Contact Information	19
Editing Premises and Contact Information	19
Deleting an Entire Contact	20
NOTES	21
Equipment	22
Zones	23
History	23
Searching Account History	24
Viewing Account History Events	24
Billing the Customer	25
Customer Billing	25
Services List	27
Parts	28
Adding Parts to a Bill	30
Payment	31
Payment Option	34
Credit Card Option Screen	34
Debit Card Option Screen	35
Check Option Screen	36
Cash Option Screen	36
Additional Services, Signature, and Invoice	37
Additional Services	37
Signature	37
Invoice	38

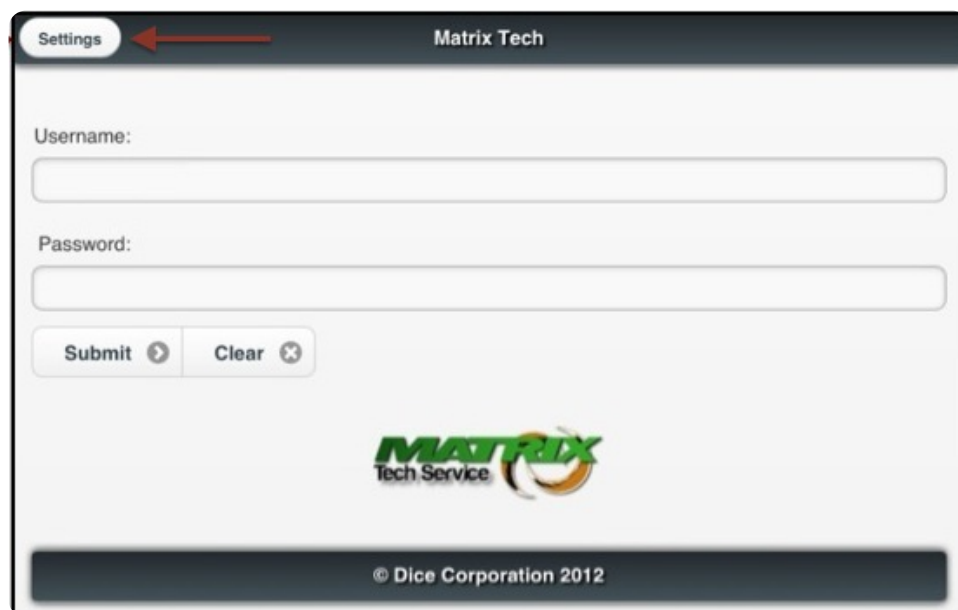
Mobile Service

Installation and Setup

Setting up the **Mobile Service** app is dependent on client configurations. Only follow steps 1-3 if using DICE-specific configurations, otherwise the user will follow the settings already configured and move on to step 4.

After installing the **Mobile Service** application from your app store, complete the following steps to setup your device:

1. Press the application icon from your device and lightly touch to open.
2. Press **Settings** to open the Settings menu (Figure 1).



(Figure 1)

3. Enter your username within the given field.
 - The DICE-specific **Matrix URL** is prefilled by your central station.
 - Enter the **App Key**, a profile for user-based configurations, which was provided to you by your central station.
4. Press **Save** to save your information.
 - The **Username** will automatically be displayed on the **Login** screen.

NOTE: The application will time-out after a period of inactivity. If this happens, you will be prompted to log in again.

Logging In

1. Enter your **Password** within the given field (Figure 2).
2. Press **Submit**.

(Figure 2)

Using the Filter Bar

The **Matrix Mobile** application provides a filter bar to easily locate specific information by using a case sensitive search. The **Filter Bar** is located on the **Contacts**, **Notes**, **Zones**, and **History** screens.

1. Enter search criteria within the **Filter Bar**.
 - Press **X** to clear the **Filter Bar**.
 - Search results will begin to display in the **Tickets** section.
2. Scroll down to find the ticket and tap to select.

NOTE: Ticket and/or account numbers will be generated containing specific numbers entered.

Selecting a Ticket

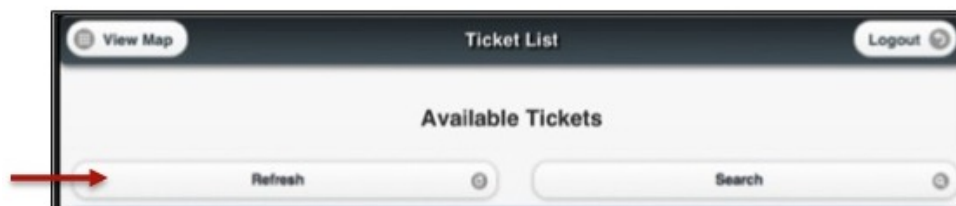
After logging into the **Mobile Service** application, the tickets assigned to your unique username will automatically be generated on the **Ticket List** screen. Select a ticket to view by completing the following steps:

1. Scroll down to find the ticket and tap to select (Figure 3).
 - You can also filter your search using the filter bar.
2. Press the row of the ticket you would like to service.

(Figure 3)

Refresh Tool

Periodically, the central station may add or update tickets while the technician is onsite. The **Refresh** tool can be used to update the tickets that appear on your screen in the event that this occurs. Select the **Refresh** tool at any time to update the ticket list (Figure 4).

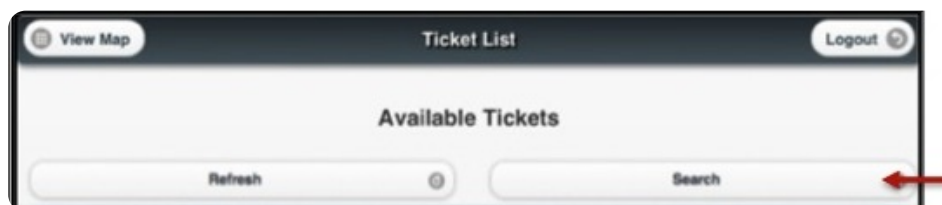


(Figure 4)

Ticket Search

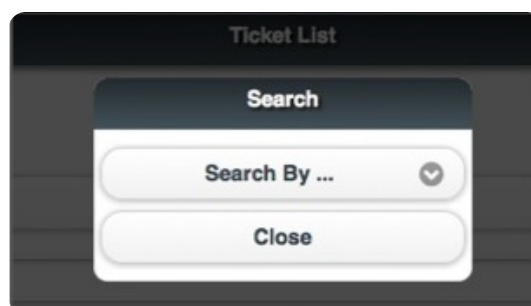
The **Ticket Search** tool is used to narrow search results with specific information regarding the exact ticket number or company name. Complete the following steps to utilize the **Ticket Search** tool:

1. Select the **Search** tool.
 - The **Search** pop-up screen will be displayed (Figure 5).



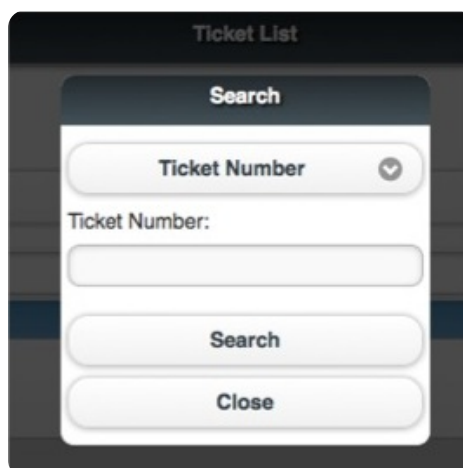
(Figure 5)

2. Choose the search option from the **Search By** drop-down list (Figure 6).



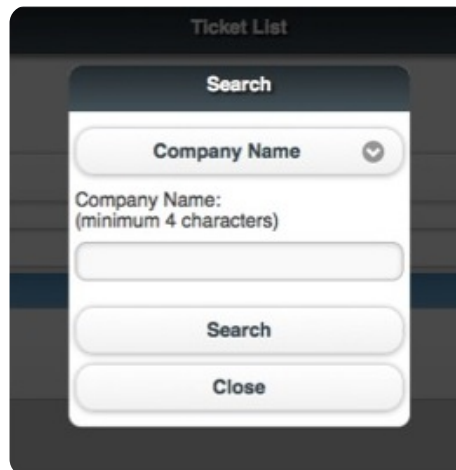
(Figure 6)

3. Select **Ticket Number** to search for a specific ticket number (Figure 7).



(Figure 7)

- **OR** Select **Company Name** to search for a specific company name. The first four letters are required to be entered in order to generate a search (Figure 8).
4. Select **Search** after entering the specific information in either category.

A screenshot of a mobile application interface showing a 'Ticket List' screen with a 'Search' overlay. The overlay has a title 'Search' and a dropdown menu currently set to 'Company Name'. Below the dropdown, it says 'Company Name: (minimum 4 characters)' followed by a text input field. At the bottom of the overlay are two buttons: 'Search' and 'Close'.

(Figure 8)

NOTE: Search results will appear on the **Ticket List** screen.

Future Ticket Search

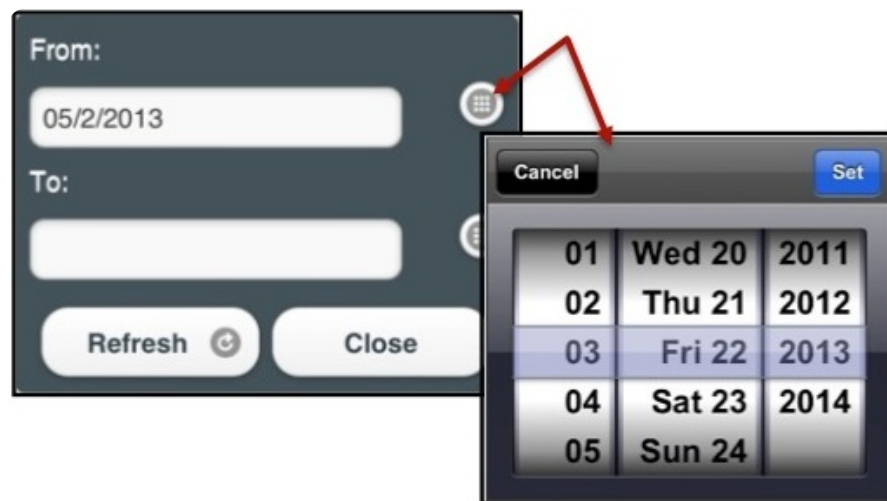
Once all current day tickets have been serviced and completed, you can select **Future Ticket** to browse tickets in a specific date range.

1. Press **Future Ticket** to choose a date range for the future ticket search (Figure 9).

A screenshot of a mobile application interface showing a 'Future Ticket' search screen. The screen displays a list of tickets. The first ticket is for '10/10/12' with 'No Appt Time'. The second ticket is for 'The Avocado Bakery' at '1103' on '01/07/13' from '1500' to '14925'. A red arrow points down to a 'Future Ticket' button at the bottom of the screen.

(Figure 9)

2. Press the **From** field to choose the day to begin the search (Figure 10).
 - The **From** field will automatically generate the current date.
 - Scroll up or down using the dials to choose the days and times.
3. Press the **To** field to choose the day to end the search.
 - Scroll up or down using the dials to choose the days and times.
4. Press **Refresh** to generate any future tickets on the **Ticket List** screen.
 - Press **Close** to exit the screen without searching for future tickets.



(Figure 10)

Tabs, Functions, and Search

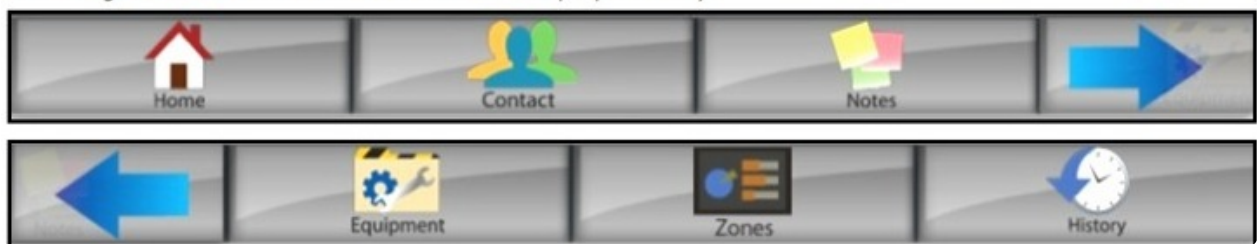
The **Mobile Service** application provides the user with navigational tabs that easily guide the user through account information. The functions and features of each tab are not dependent on the sequence of another, unless defined in its own section.

Using the Navigational Toolbar

The tabs and functions of the **Mobile Service** application allows the user to navigate through and review account information during a service call, accessing the information any time during the service process (Figure 11).

- Tap each button to display the section.
- Tap the arrow buttons to reveal more menu options.

The navigational tabs are divided for instructional purposes only.

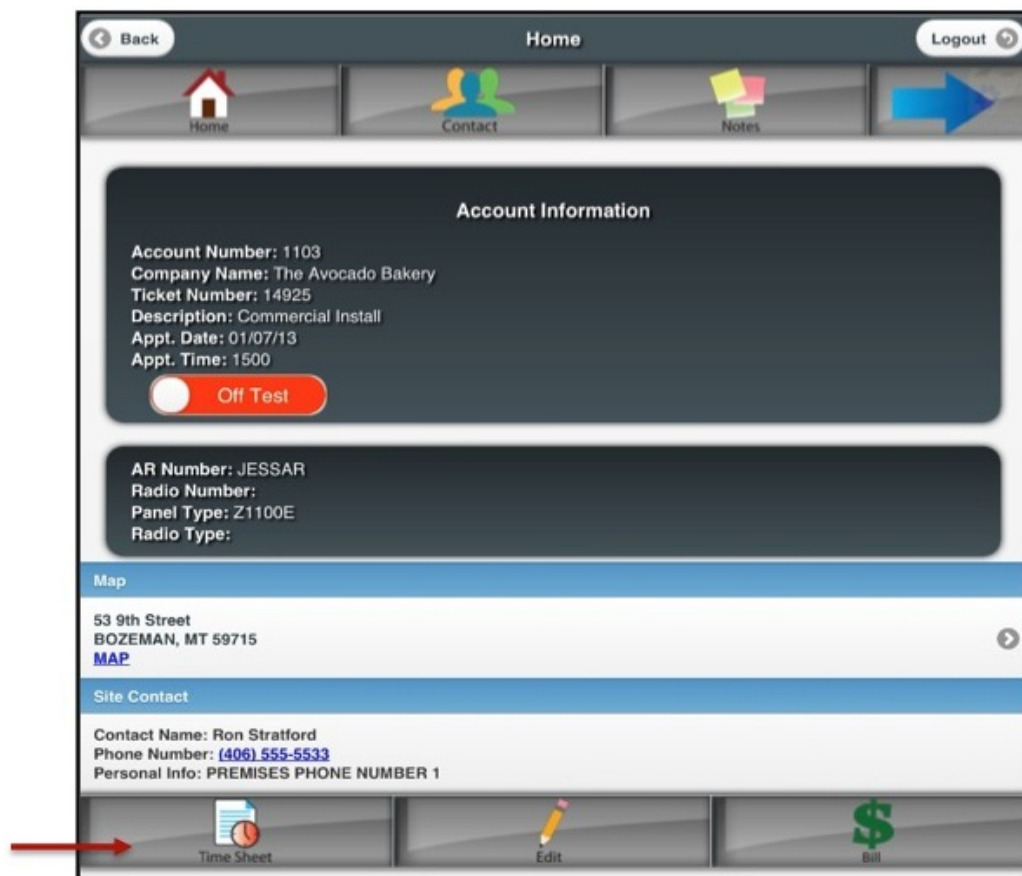


(Figure 11)

Tab	Function
Contacts	Displays premises contact information and account contact information.
Equipment	Displays all equipment located onsite.
History	Allows users to search account history and displays account history details.
Home	Allows users to put the account on/off test, provides directions to the site, and displays site contact and account information.
Notes	Displays billing, customer, install, service, directions, and temporary notes.
Zones	Displays zone codes and descriptions for the zones located on the site.

Home Screen and Navigational Toolbar

The **Home Navigational Toolbar** is located at the bottom of the **Home** screen (Figure 12). These buttons allow technicians to keep time sheet records, edit home screen information, and bill the customer.



(Figure 12)

Tab	Function
Bill	Navigates the user to the customer billing section.
Edit	Edits premises contact information and account information on the home screen.
Time Sheet	Records service time while on a ticket, including arrival, start day, start travel, start job, and end day.

Using the Help Option

The **Help** button is located at the top right corner of the screen and can be selected at any time when using the application (Figure 13). This option provides a link to a PDF of the documentation and a link to access the **Matrix Mobile Service** video tutorial.



(Figure 13)

Complete the following steps to use the **Help** button:

1. Press the **Help** button to display the **Support** pop-up.
2. Select to view the video tutorial or the documentation for the application.

Video Tutorial

View the video tutorial by completing the following steps:

1. Press **Video Tutorial** from the **Support** pop-up.
2. Press **Play** to start the video (Figure 14).
 - Press **X** to exit the video and return to the application.

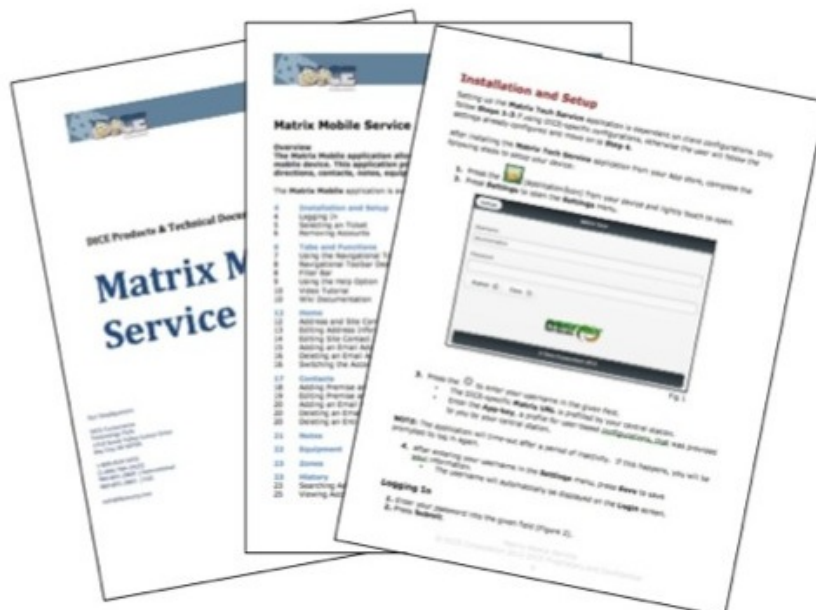


(Figure 14)

Documentation

Read documentation as a PDF by completing the following steps:

1. Press **Documentation** from the **Support** pop-up.
 - A PDF of the documentation will display automatically in a browser on your mobile device (Figure 15).



(Figure 15)

2. Return to **Mobile Service** by double-tapping the **Home** key on your device.

- The **Service** icon will display.
- Press the **Mobile Service** icon to return to your previous spot.

Time Sheet

Mobile Service allows a technician to record his/her hours on the **Time Sheet** screen. Hours can be recorded with the following selections:

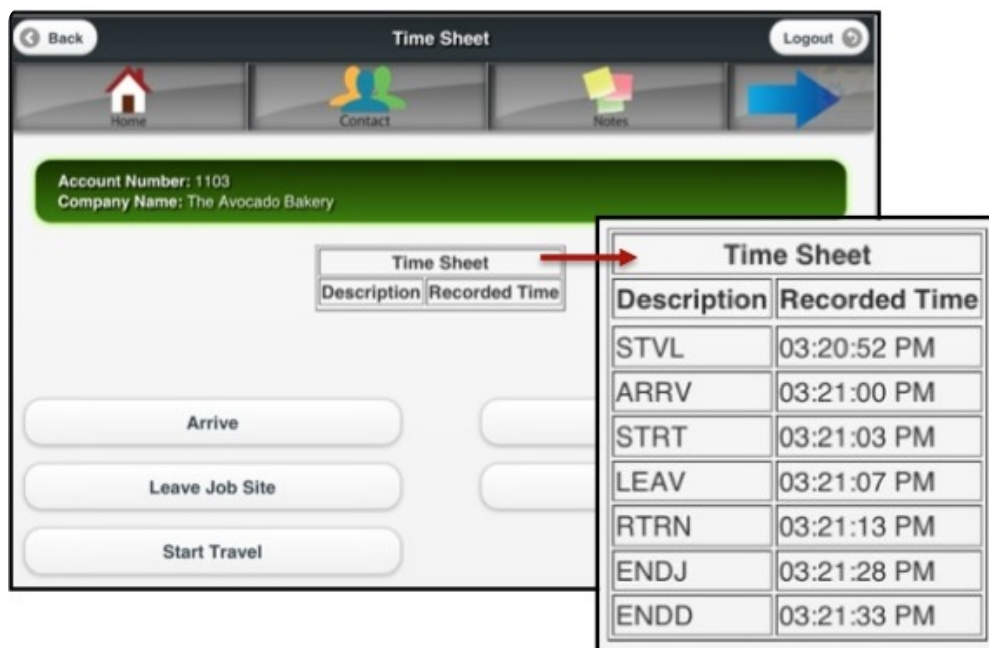
- Arrive
- Start Travel
- Start Job
- End Job
- Leave Job Site
- Return to Job Site

NOTE: If there is not a **Start Day** time or **End Day** time, the application will automatically record those times after any selection is made. The default **Start Day** time varies and is based on customer configurations. The **End Time** will automatically refresh and record as the technician logs hours immediately after the last activity.

To log service time, complete the following steps:

- Select **Time Sheet** (Figure 16).
 - The **Time Sheet** screen will display.
- Select an action to enter your activity for the current time.
 - The time will automatically be recorded to the time sheet table.
- Select **Back** to navigate to the previous screen.

NOTE: Each recorded time will be saved on the **Time Sheet** screen. Please refer to your specific company for **Time Sheet** guidelines.



(Figure 16)

Field	Time Sheet Description	Description
Arrive	AARV	The time at which the technician arrived to the site.
End of Day	ENDD	The time at which the technician finished his/her day.
End of Job	ENDJ	The time at which the technician finished the ticket.

Leave Job Site	LEAV	The time at which the technician left the job site temporarily.
Return to Job Site	RTRN	The time at which the technician returned to the job site.
Start Day	SDAY	The time at which the technician started his or her day.
Start Job	STRT	The time at which the technician started the ticket.
Start Travel	STVL	The time at which the technician started his/her travel to the site.

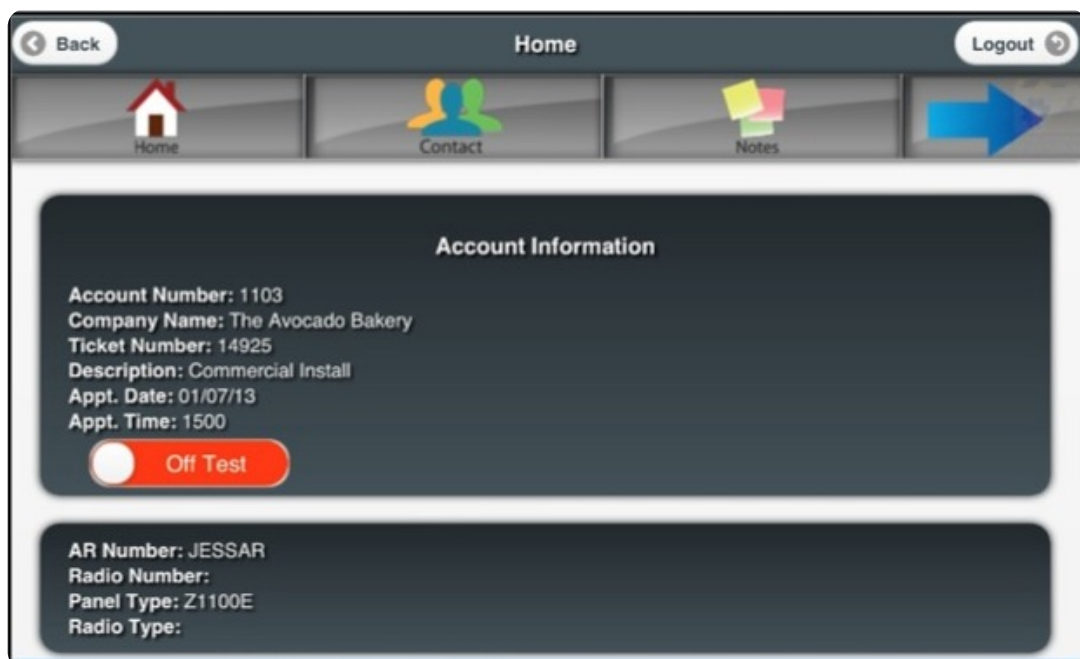
NOTE: The **Time Sheet** displays the hour, minute, and second.

Home

The **Home** screen is displayed after an account has been selected (Figure 17). The **Navigational Toolbar** contains all tabs and is provided on each screen. The **Home Navigational Toolbar** is located at the bottom of the screen and is only visible on the **Home** screen.

The sections located on the **Home** screen are:

- Account Information
- On/Off Test Switch
- Address Information
- Site Contact Information



(Figure 17)

Field	Description
Account Number	The number of the account that the ticket is assigned to.
Appt. Date	The date the ticket is to be serviced.
Appt. Time	The time at which the ticket is to be serviced.
AR Number	The accounts receivable number.

Company Name	The name of the company attached to the account number.
Description	A description of the ticket being serviced.
On/Off Test	Displays if the account is currently on or off test for the servicing of the ticket.
Panel Type	The type of panel used onsite.
Radio Number	The linked account number.
Radio Type/Identifier	The type of linked account or custom identifier.
Ticket Number	The number of the ticket being serviced.

Switching the Account On/Off Test

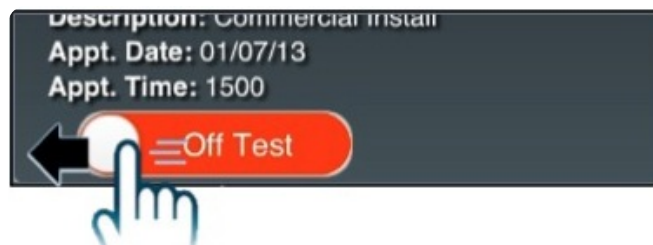
The account information box directly above the **Navigational Toolbar** displays the account number and company name on each screen. Within the **Home** screen, the on/off test option is displayed. To put an account on/off test, complete the following steps:

- Swipe the button from left to right to put the account **On Test** (Figure 18).



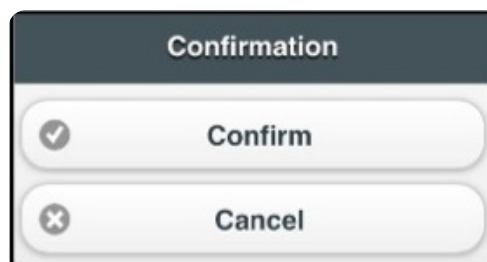
(Figure 18)

- Swipe the button from right to left to put the account **Off Test** (Figure 19).



(Figure 19)

- Press **Cancel** to continue changing the account's status (Figure 20).



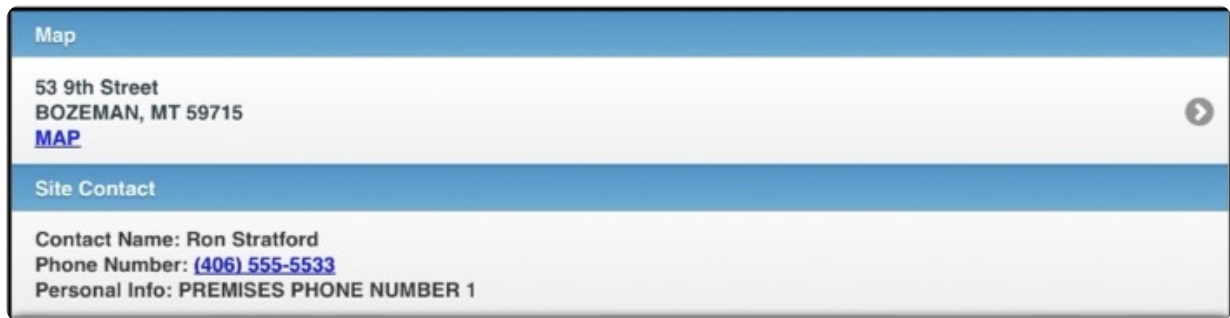
(Figure 20)

Map and Site Contact Information

The **Address** section provides the address of the account (Figure 21). The **Site Contact Information** section provides the first priority site contact information of the account, including the following

information:

- Contact Name
- Email
- Personal Info (brief description of contact type)
- Phone Number



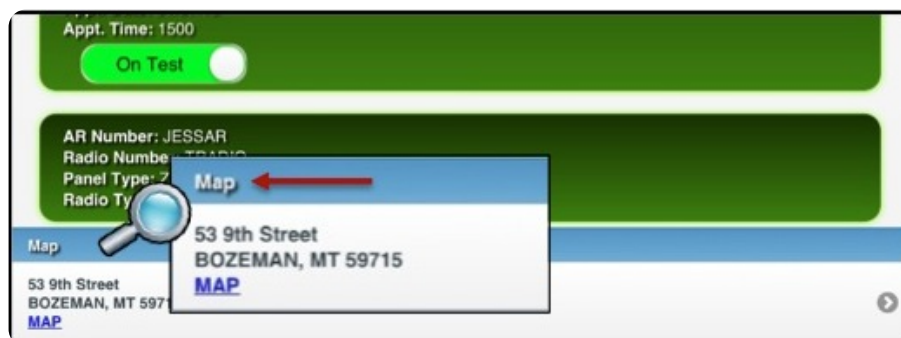
The screenshot shows a mobile application interface. At the top, there is a blue header bar with the word "Map" in white. Below this, a white box contains the address "53 9th Street" and "BOZEMAN, MT 59715". A blue "MAP" hyperlink is visible. To the right of the address is a right-pointing arrow icon. Below the address box is another blue header bar with the text "Site Contact". Underneath, the contact information is listed: "Contact Name: Ron Stratford", "Phone Number: (406) 555-5533", and "Personal Info: PREMISES PHONE NUMBER 1".

(Figure 21)

Field	Description
Contact Name	Displays the name of the site contact.
Email	Displays the contact's email address.
Personal Info	Displays information about the site contact.
Phone Number	Display's the contact's phone number.

Map

The **Map** section provides the address of the account and is embedded with Google Maps™ (Figure 22). When the **Map** hyperlink is selected, a map will generate the general location of the address to be serviced.



(Figure 22)

To view a map of the site, complete the following steps:

1. Select the **Map** hyperlink in the **Map** section.
2. Select **OK** to have the application use your location.
3. Edit the address, if needed, by tapping the text field that displays the address at the bottom of the map section (Figure 23).
 - Select **Refresh** to update the address and the map.

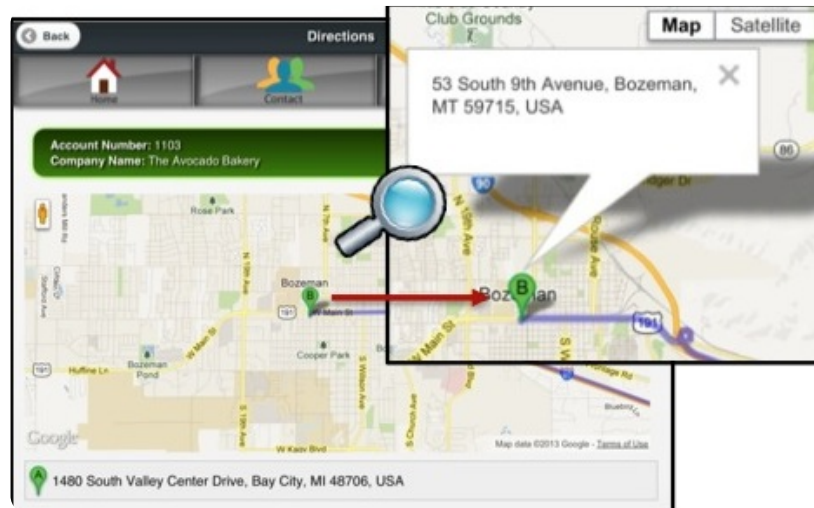
Address:
(ex. 1346 Oakbrook Drive Atlanta GA 30093)

53 9th Street, BOZEMAN, MT 59715

Refresh

(Figure 23)

- Directions are located under each corresponding pin (Figure 24).
- Hover over each pin to display details about the location.



(Figure 24)

- To view the map in satellite mode, select **Satellite** (Figure 25). All other features remain the same while in this mode.

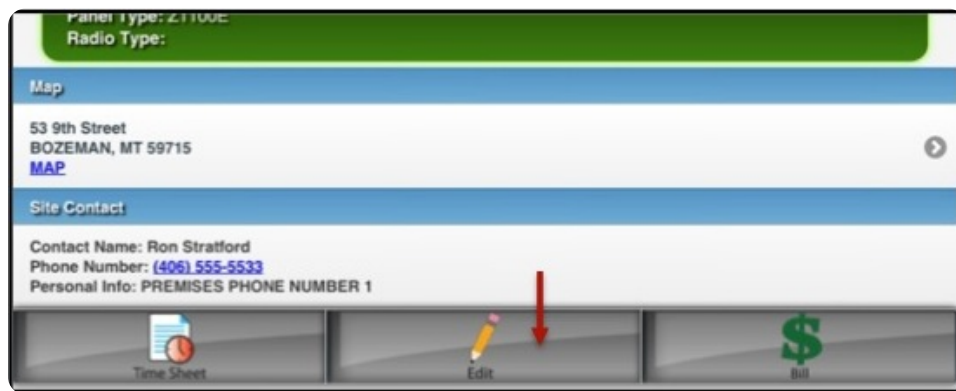


(Figure 25)

Edit

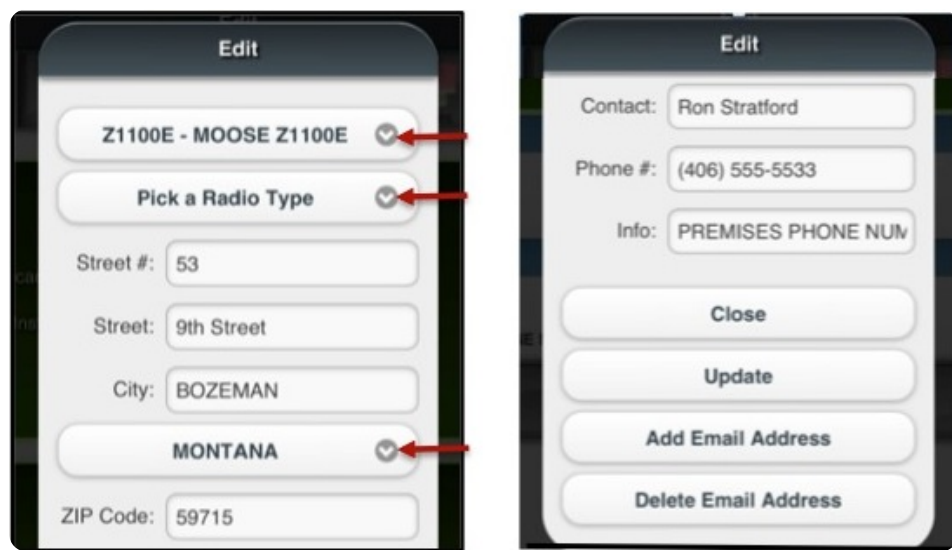
The **Edit** screen allows the technician to modify and/or add site and contact information on the selected account. To edit site and contact information, complete the following steps:

1. Select **Edit** (Figure 26).
 - The **Edit** screen will display.



(Figure 26)

2. Edit any necessary information within the given fields and drop-down lists (Figure 27).
3. Select **Update** to save the modified information.
 - Select **Close** to exit the **Edit** screen without making changes.



(Figure 27)

Field	Description
Add Email Address	Adds an additional email address for the contact.
City	The city where the account is located.
Close	Closes the Edit screen.
Contact	The name of the site contact.
Delete Email Address	Deletes an email address from the contact.
Email 1	The email address of the contact.
Info	The contact description.
Panel Type	The type of panel located onsite.
Phone #	The contact's phone number.
Radio Type/Identifier	The type of linked account.
State	The state where the account is located.
Street	The name of the street where the account is located.

Street #	The street number where the account is located.
Update	Updates any changes made to the edit screen.
ZIP Code	The ZIP code where the account is located.

Adding an Email Address

Add an email address by completing the following steps:

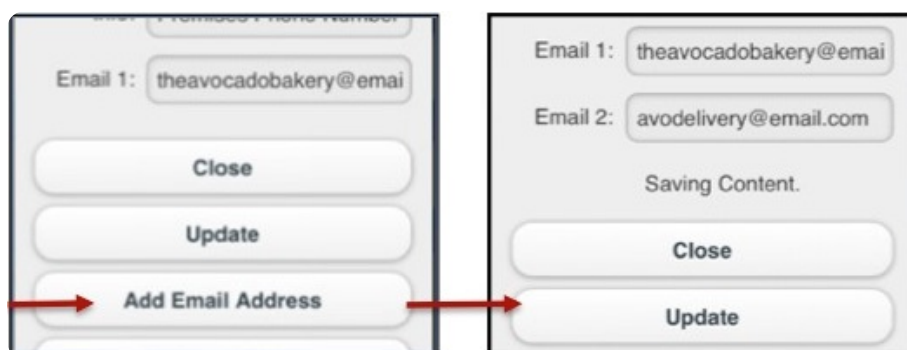
1. Swipe from left to right within the given row in the **Contacts** section (Figure 28).
 - The **Edit** button will display.
2. Press Edit.
 - The **Edit** pop-up screen will display.



(Figure 28)

3. Press **Add Email** to generate an **Email** text field (Figure 29).
4. Press **Update** to save the changes.
 - Press **Close** to exit the screen without saving.

NOTE: If you are editing information on the **HOME** screen, press **Edit** in the **Home Navigational Toolbar** instead of swiping from left to right within the given row.



(Figure 29)

Deleting an Email Address

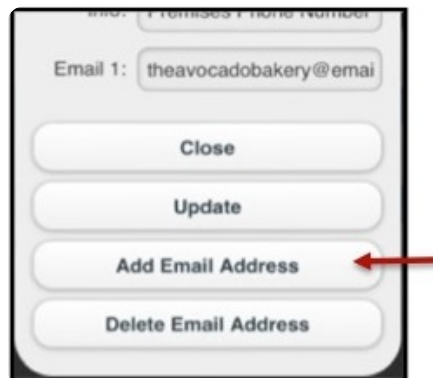
Delete an email address by completing the following steps:

1. Repeat steps 1-2 of **Adding an Email Address**.
2. Press **Delete Email Address** (Figure 30).
3. If there are multiple emails for the contact, select the email displayed to view a list of the other emails for the contact, then press the email to delete.



(Figure 30)

4. Press **Delete** to delete the email (Figure 31).
5. Press **Update** to save the changes.
 - Press **Close** to exit the screen without saving. **NOTE:** If you are editing information on the **HOME** screen, press **Edit** in the **Home Navigational Toolbar** instead of swiping from left to right within the given row.



(Figure 31)

Contacts

The **Contacts** screen displays all contact information for the account, including the **Premises** and direct **Contact** information.

The **Premises Contact** section is the second list of contacts to call for that specific account. Both the **Premises** and **Contact** information include the following information (Figure 32):

- Contact Name
- Phone Number
- Personal Information
- Email

Premises Add

Contact Name: Roland Greene
 Phone Number: (406) 555-5523
 Personal Info: PREMISES PHONE NUMBER 2

Contact Add

Contact Name: Jimmy Reynolds
 Phone Number: (406) 555-7764
 Personal Info: Co-owner
 Email 1: jimmyreynolds@email.com

Contact Name: Greg Peck
 Phone Number: (406) 555-8874
 Personal Info: Manager
 Email 1: gregpeck@email.com

Contact Name: Albert Marks
 Phone Number: (406) 555-5523
 Personal Info: Co-Owner
 Email 1: albertmarks@email.net

(Figure 32)

Field	Description
Contact Name	The name of the site contact.
Email 1	Displays the site contact's email address.
Personal Info	Information about the site contact.
Phone Number	The site contact's phone number.

Adding Premises and Contact Information

Add the **Premises** and **Contact** information by completing the following steps:

1. Press **Add** within the given row in the **Premises** or **Contact** sections (Figure 33).
 - The **Add** pop-up screen will display.
2. Enter the necessary information.
3. Press **Add** to save the changes.
 - Press **Close** to exit the screen without saving.

Add

Contact:

Phone #:

Info:

Close

Add

(Figure 33)

Editing Premises and Contact Information

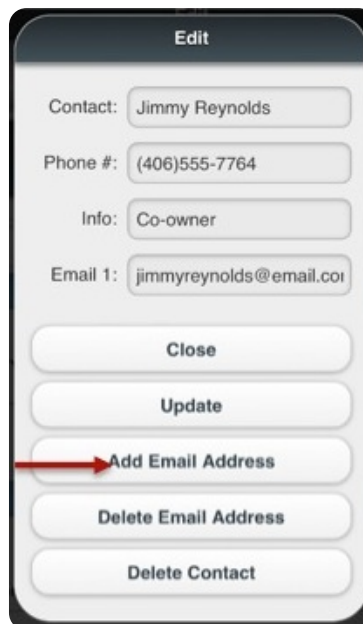
Edit address information by completing the following steps:

1. Swipe from left to right within the given row in the **Premises** or **Contact** sections (Figure 34).
 - The **Edit** button will display.
2. Tap the **Edit** button to display the **Edit** screen.



(Figure 34)

3. Modify the necessary information (Figure 35).
4. Press **Update** to save the changes.
 - Press **Close** to exit without saving.



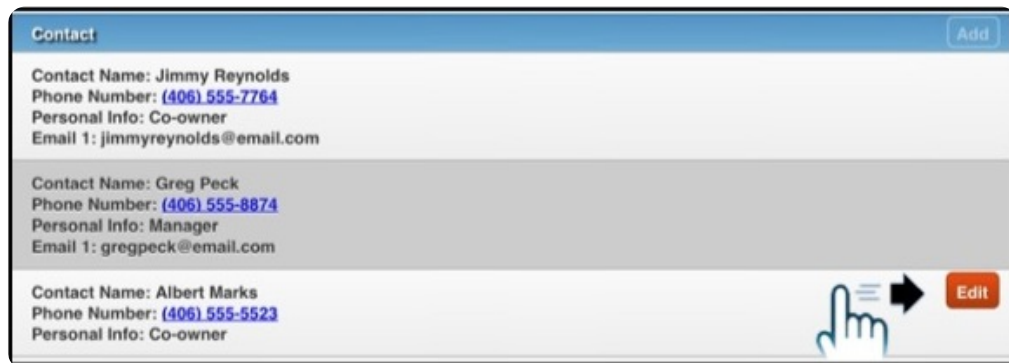
(Figure 35)

NOTE: Refer to pages 20-21 for instructions on adding and deleting an email address.

Deleting an Entire Contact

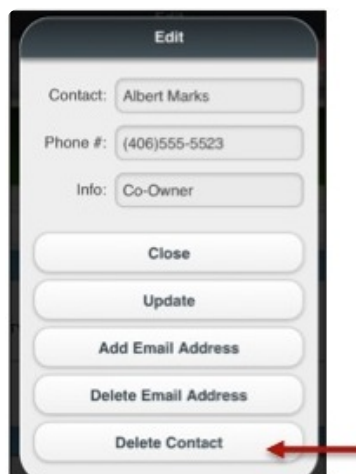
Delete an entire contact by completing the following steps:

1. Swipe from left to right within the given row of the **Premises** or **Contact** sections (Figure 36).
 - The **Edit** button will display.
2. Press **Edit**.
 - The **Edit** pop-up screen will display.



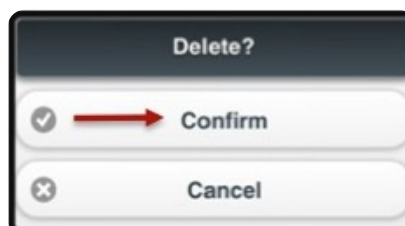
(Figure 36)

3. Press **Delete Contact** (Figure 37).



(Figure 37)

4. Press **Confirm** to delete the contact (Figure 38).
 - Press **Cancel** or **X** to return to the **Edit** screen without deleting the contact.



(Figure 38)

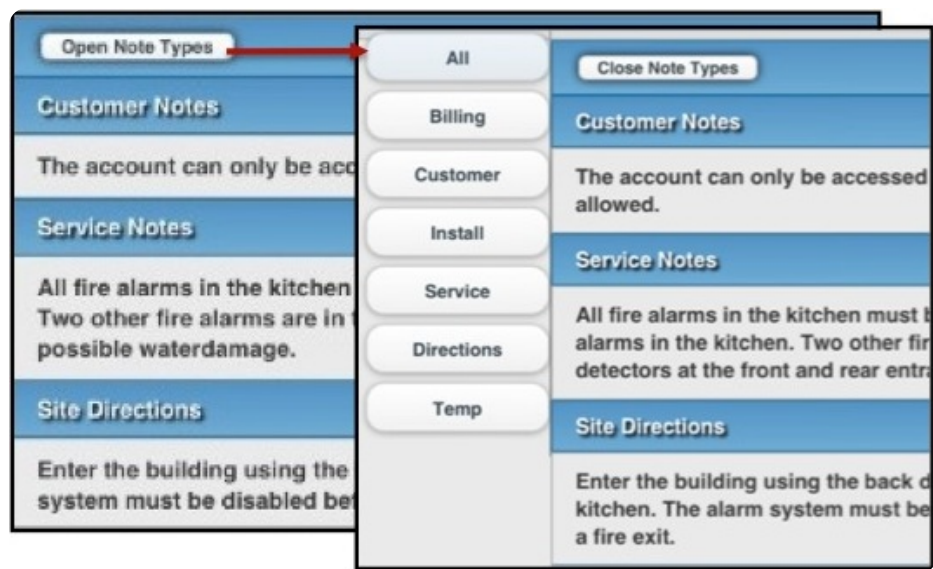
NOTES

The **Notes** screen provides the ability to review various notes while servicing an account. Typical notes include information regarding details about the account, alarms, or a site that must be reviewed (Figure 39). This screen allows the user to view all the notes on one screen or individually. Note categories include:

- Billing
- Customer
- Install
- Dispatch
- Service
- Site
- Temporary

NOTE: Select **Open Note Types** to select different note types to view. Select **Close Note Types** to

close the note menu.



(Figure 39)

Field	Description
All	All notes from the account.
Billing	The billing notes for the account.
Customer	The customer notes for the account.
Directions	The site directions for the account.
Install	The installation notes for the account.
Service	The service notes for the account.
Temp	The temporary notes for the account.

Equipment

The **Equipment** screen provides the ability to view a list of equipment that has been used onsite (Figure 40). The equipment list displays the recorded inventory with details.

NOTE: The equipment sorted numerically by item code.

Equipment
Item Code: 001000 Item Description: Nonstocking item Quantity: 4
Item Code: 03.200.SERIAL16 Item Description: Serial / Network / Modem multiport Quantity: 5
Item Code: 13VA3_8 Item Description: BELCO 12" V. FOCAL AL3 8MM

(Figure 40)

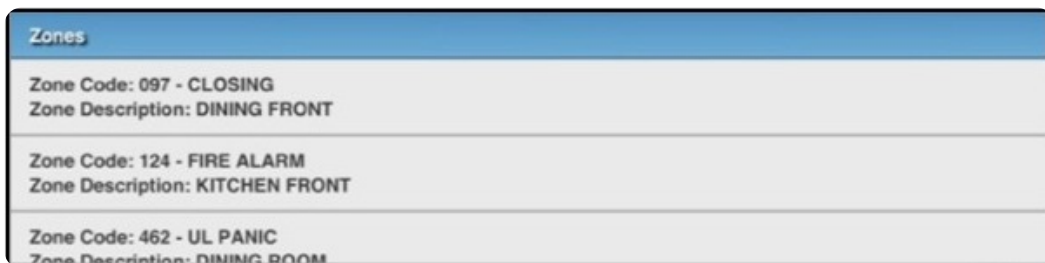
Field	Description
-------	-------------

Item Code	The item code used for inventory.
Item Description	The description of the item.
Quantity	How many (of the specific item) are onsite.

Zones

The **Zones** screen displays zone codes and item descriptions for the alarm points (Figure 41). The zone list will display the **Zone Code** and the **Item Description** for the zone to help determine where zones are located and what devices may be in the vicinity.

NOTE: Zones are sorted alphabetically by zone code.



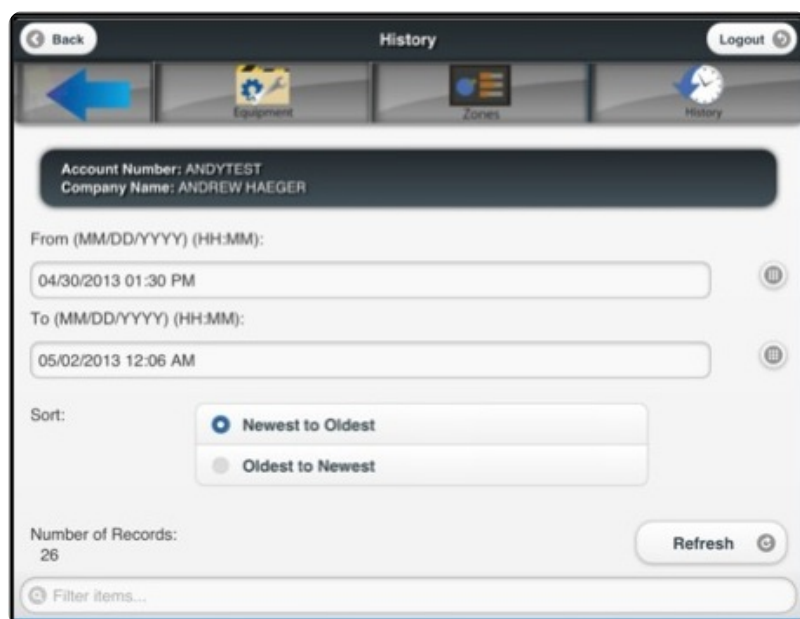
Zones	
Zone Code: 097 - CLOSING	Zone Description: DINING FRONT
Zone Code: 124 - FIRE ALARM	Zone Description: KITCHEN FRONT
Zone Code: 462 - UL PANIC	Zone Description: DINING ROOM

(Figure 41)

Field	Description
Item Description	Displays a description of the zone.
Zone Code	Displays the specific zone code.

History

The **History** screen displays account history that can be searched by a specific date and time range (Figure 42). Detailed account events will generate below the date and time section.



Back
History
Logout

Account Number: ANDYTEST
Company Name: ANDREW HAEGER

From (MM/DD/YYYY) (HH:MM):
04/30/2013 01:30 PM

To (MM/DD/YYYY) (HH:MM):
05/02/2013 12:06 AM

Sort:

☒ Newest to Oldest
☐ Oldest to Newest

Number of Records:
26

Filter items...
Refresh

(Figure 42)

NOTE: The central station defines a specific color using a system-wide setting and is not definable per user. The color is based on alarm priority or alarm type.

Searching Account History

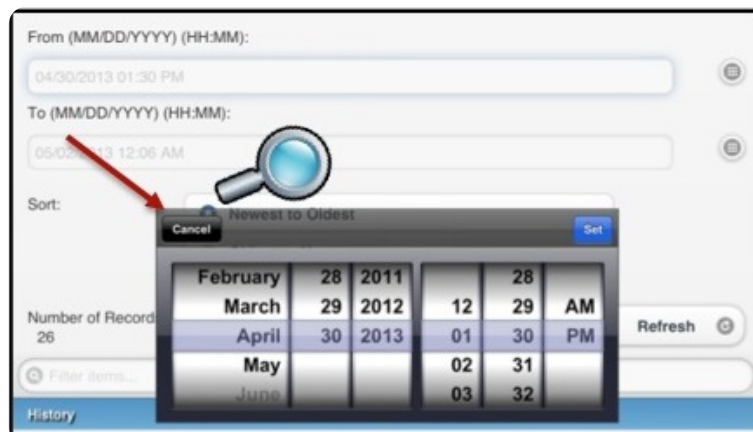
To enter a date range to view specific account history, complete the following steps:

1. Press the **From** field to choose the day and time to begin the search (Figure 43).
 - Scroll up or down using the dials to choose the days and times.
2. Press **Set** to use the selected date and time for the **From** information.
 - Press **Cancel** to exit the **From** pop-up without saving.



(Figure 43)

3. Press the **To** field to choose the day and time to begin the search (Figure 44).
 - Scroll up or down using the dials to choose the days and times.
4. Press **Set** to use the selected date and time for the **To** information.
 - Press **Cancel** to exit the **To** pop-up without saving.



(Figure 44)

5. Press **Refresh** to load the account history for the given date and time range.

Viewing Account History Events

Once a date and time range is selected, the results will generate below the **History** header. History events can be expanded to display details of the event, which include the following:

- Date
- Time
- Dealer Code
- Company Name
- Account Number

- Short Description of the Alarm and the Event.

To view details of an account event, complete the following steps:

1. Press an event summary to expand the event (Figure 45).
2. Event details will display beneath the event summary.
3. Press the event summary again to minimize the event.

NOTE: Account history can be sorted from newest to oldest by selecting one of the two options within the **Sort** section.

The screenshot shows a mobile application interface for viewing account history. At the top, there are two date and time input fields: 'From (MM/DD/YYYY) (HH:MM):' with the value '05/23/2011 01:30 PM' and 'To (MM/DD/YYYY) (HH:MM):' with the value '05/02/2013 12:06 AM'. Below these is a 'Sort:' section with two radio button options: 'Newest to Oldest' (unselected) and 'Oldest to Newest' (selected). A red arrow points to the 'Oldest to Newest' option. Below the sort section is a 'Number of Records:' label with the value '50' and a 'Refresh' button. A search bar labeled 'Filter items...' is also present. The main section is titled 'History' and contains a list of events. The first event is '04/26/13 13:34:19 Status changed on ticket: 14597'. The second event is '04/26/13 13:34:20 Resolution notes on ticket: 14597', which is expanded to show details: '04/26/13 FRI 13:34:20 Resolution notes on ticket: 14597', '4/26/2013//TKT# 14597//andyh/Test', '//ANOTHER LABOR 00.56 HRS 90', 'PARTS 0 TOTAL 0//Testing', and '04/26/13 FRI Name: ANDREW HAEGER Acct: ANDYTEST DEA:JULIE7'. A red arrow points to the minus icon next to the second event, indicating it can be collapsed.

(Figure 45)

NOTE: The number of records available for the specified time/date range will be displayed under the **Number of Records** label.

Billing the Customer

To bill the customer, select **Bill** after the ticket has been serviced. Once the billing process is complete, the ticket will not be available for selection. The following screens are used after selecting the **Bill** option:

- Customer Billing
- Services List
- Parts
- Payment
- Payment Options
- Signature
- Invoice

Customer Billing

The **Customer Billing** screen is used to log the technician's service information for the specific ticket, including choosing a payment action, selecting a payment and rate code, and entering the number of hours the technician spent servicing the ticket (Figure 46).

(Figure 46)

Field	Description
Hours	The number of hours the technician worked.
Next	Continues to the next screen.
Notes	The description of the ticket service.
Pick A Payment Action	The payment status of the ticket (Complete, Incomplete, or No Charge).
Pick A Payment Code	The type of service that was performed or part replaced.
Pick A Rate Code	The rate at which the account will be billed.
Reschedule Date	A date to reschedule the service if Incomplete was selected as a payment action.

To enter information for **Tech Hours**, complete the following steps:

NOTE: If **Incomplete** is chosen, the technician will be asked to enter a **Reschedule Date**.

1. Press **Pick A Payment Action** to select the ticket payment status (Figure 47).

(Figure 47)

2. Press **Pick A Payment Code** to select a payment code for the bill (Figure 48).
 - Swipe up and down to scroll through the list.

Pick A Payment Code ✓

TECH REPLACED PANEL

TECH REPLACED KEY

TECH REPLACED MOTION DETECTOR

CUSTOMER CANCELLED CALL

TECH REPLACED BATTERY

SRVC COMPLETE REFER TO SALES

Pick A Payment Action ✓

Pick A Payment Code ✓

MICHIGAN RATE CODE ✓

(Figure 48)

3. Enter the number of hours spent servicing the ticket in decimal format (Figure 49).
4. Select **Next** to continue to the next screen.

NOTE: The **Rate Code** will automatically default to the rate code that is on the ticket. The **Michigan Rate Code** shown is for demonstration purposes only.

Hours:

5.55

Next ✓

(Figure 49)

Services List

The **Services List** is used to define all the services completed and enter detailed notes of what was performed during the ticket, including the following (Figure 50):

- Checklist
- Battery Voltage
- Service Explanation
- Work Performed

Back Services List Logout

Check All

Check those that apply:

☐ RADIO TESTED

☐ VOIP

☐ YARDSIGNS

Battery Voltage:

Service Explanation:
182 characters left

Commercial Install

Work Performed:
200 characters left

Next ✓

(Figure 50)

Field	Description
Battery Voltage	The battery voltage number for the tested battery.
Check All / Uncheck All	Check or uncheck all of the given service options.
Next	Continues to the next screen.
Service Explanation	The description of the service performed for the ticket.
Work Performed	A summary of the work performed for the ticket.

To enter information for **Services List**, complete the following steps:

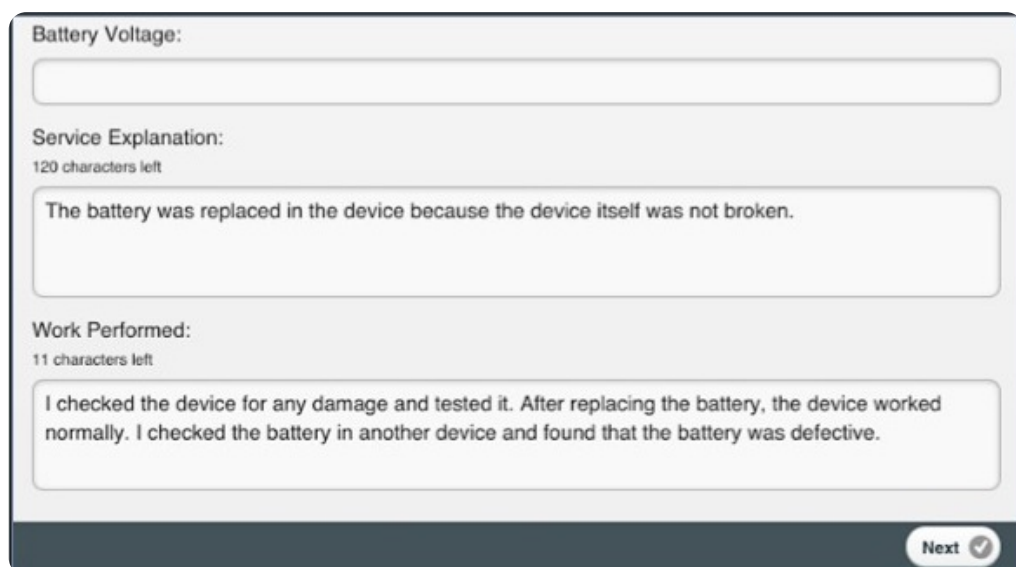
1. Press a checkbox from the checklist to apply the service to the ticket (Figure 51).
 - Select **Check All** to select all of the options and select **Uncheck All** to deselect all of the options.

A screenshot of a mobile application interface for a checklist. At the top is a button labeled "Check All". Below it, the text "Check those that apply:" is followed by three items, each with a checkbox and a label: "RADIO TESTED" (checked), "VOIP" (unchecked), and "YARDSIGNS" (unchecked).

(Figure 51)

2. Enter the **Battery Voltage** number within the text field (Figure 52).
3. Enter the reason for the service within the **Service Explanation** field.
4. Enter the work that was performed within the **Work Performed** field.
5. Select **Next** to proceed to the next screen.

NOTE: The checklist options will vary depending on customer account configurations.

A screenshot of a mobile application form for entering service details. It has three main sections: "Battery Voltage:" with a text input field; "Service Explanation:" with a text area (120 characters left) containing the text "The battery was replaced in the device because the device itself was not broken."; and "Work Performed:" with a text area (11 characters left) containing the text "I checked the device for any damage and tested it. After replacing the battery, the device worked normally. I checked the battery in another device and found that the battery was defective." At the bottom right is a "Next" button with a checkmark icon.

(Figure 52)

Parts

The **Parts** screen is used to specify which parts were used while servicing the ticket. These parts are

taken from the inventory of the technician's truck and added to the account's bill (Figure 53).

(Figure 53)

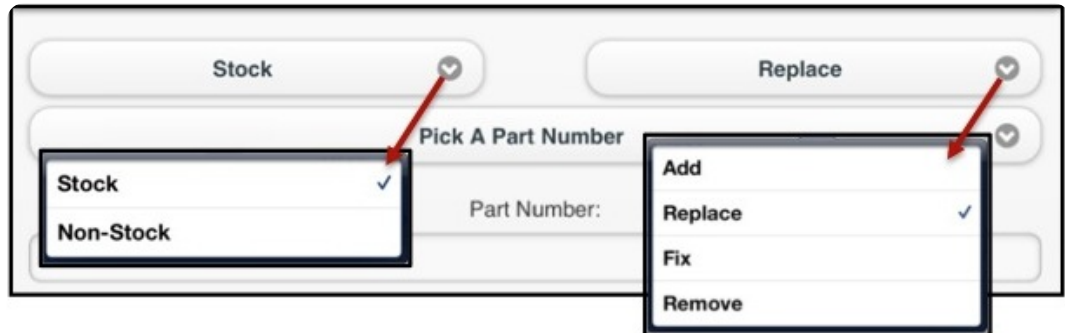
Field	Description
Add	Adds a chosen part to the ticket. NOTE: Any parts added to the inventory list that were used for the ticket will be highlighted in green.
Delete	Deletes a chosen part from the ticket.
Fix	Any parts fixed during the service of the ticket will be yellow.
Next	Continues to the next screen.
Non-Stock	A part that is not located in the inventory.
Part Description	A brief description of the part used.
Part Number	The number associated with a selected part. This will automatically generate if a stock part is chosen. If a non-stock part is chosen, a part number must be entered.
Pick A Part Number	The number of a part from the list that was used for the ticket.
Price	The price of the part used, which will automatically generate if a stock part is chosen. If a non-stock part is chosen, a price must be entered. NOTE: This number can also be altered if a stock item has been selected.
Quantity	How many of a specific part was used for the ticket.
Remove	Any parts removed during the service of the ticket will be highlighted in red.
Replace	Any parts replaced during the service of the ticket will be highlighted in dark yellows.
Stock	A part located on the technician's truck.
Total	The total price of all parts used for the ticket.

Adding Parts to a Bill

To add parts to the bill, complete the following steps:

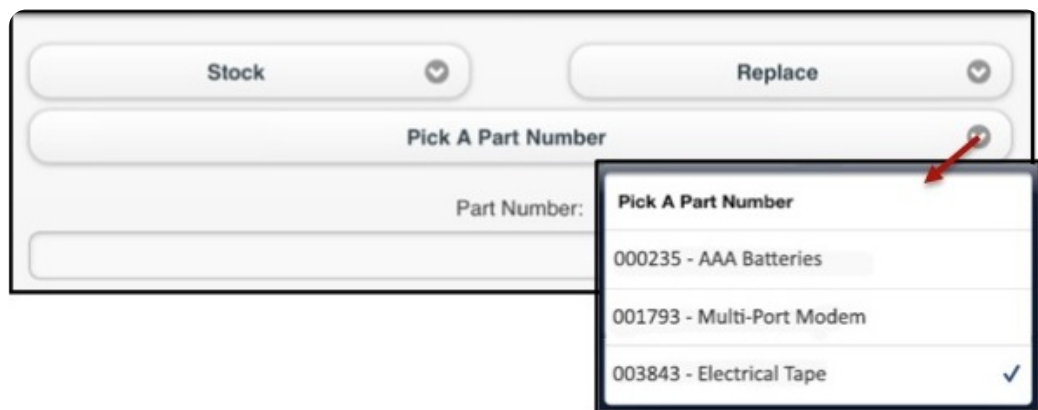
NOTE: The **Add** function displays by default. If **Non-Stock** was chosen, enter the **Part Number** within the field and skip 2-3 (Figure 56).

1. Tap the arrow located on the **Add** drop-down menu to add, replace, remove, or fix a part (Figure 54).
 - If **Add** is selected, chose whether the part was a stock or non-stock item by tapping the arrow located on the stock tool.

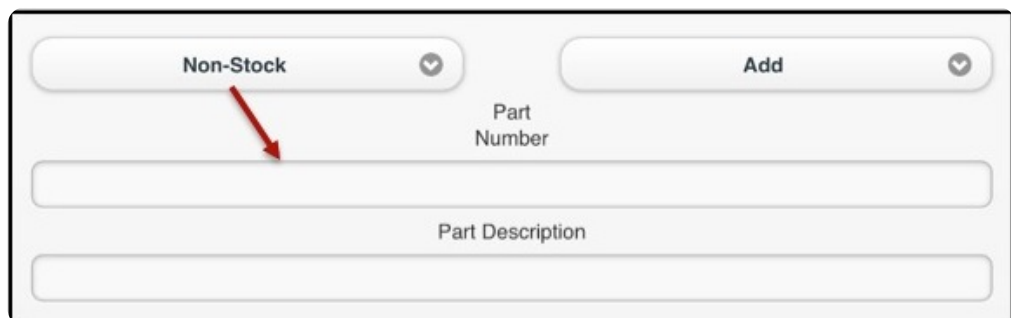


(Figure 54)

2. Select **Pick A Part Number** to display part number options (Figure 55).
3. Select a **Part Number** by scrolling through the list and pressing an option.
 - The part number field will automatically generate with the selected part number.



(Figure 55)



(Figure 56)

4. Select **Quantity** to display a numbered list (Figure 57).
5. Select the number of parts used by scrolling through the list and pressing an option.
 - The price of the part will automatically generate in the **Price** field, based on the inventory list and adjusted by quantity selected. Edits are allowable in these fields.

(Figure 57)

6. Select **Add** to add the part(s) to the bill (Figure 58).
 - Select an added part and then press **Delete** to remove the part from the bill.
7. Repeat steps 1-6 until all parts have been added for the ticket.
8. Select **Next** to continue to the next screen.

Parts	Part Number	Quantity	Price
	M920	x1	\$ 0.5
	45M22	x10	\$ 0.3
	001000	x1	\$ 1.27
	M330	x1	\$ 53.75
	00943	x1	\$ 138.99
Total: \$ 142.49			
<div> <div>+ Add</div> <div>× Delete</div> </div>			
<div>Next ✓</div>			

(Figure 58)

Payment

Payment displays a summary of the ticket service and address rates that can be added to the customer's bill (Figure 59). All information in the **Payment** screen is generated from previous entries during the **Bill** process. The bill's total is displayed at the bottom of the screen.

The screenshot shows an iPad screen with the title 'Payment'. At the top, there is a status bar with 'iPad', signal strength, '10:17 AM', and '35%'. Below the status bar is a navigation bar with a 'Back' button, the title 'Payment', and 'Help' and 'Logout' buttons.

The main content area contains the following sections:

- Payment Action**: Code: COM, Description: COMPLETE
- Payment Code**: Code: COMPD, Description: TECH REPLACED GLASS BREAK DETECTOR
- Rate Code**: Code: ARIZONA, Description: ARIZONA - COMMERCIAL
- Labor Hours**: 0.43 Hour(s)
- Reschedule Date**: None
- Battery Voltage**: 17.34 Volts
- Miscellaneous**:
 - CALL WAITING
 - RADIO TESTED
 - STICKERS
 - YARDSIGNS
- Work Performed**: A text box containing 'The upstairs master bedroom had a broken glass break detector. It has been replaced and tested.'
- Services Explained**: A text box containing 'Annual Fire Test'
- Labor Cost**: A text box containing '85'
- Parts**: A text box containing '80'
- Gas Surcharge**: A text box containing '26'
- Add-On**: A text box containing '0'
- Total: \$ 191**
- Recalculate**: A button
- Pay**: A button with a checkmark icon

(Figure 59)

Field	Description
Add-On	Enter any additional charges to add to the ticket or a discount (by adding a negative number).
Battery Voltage	Displays the battery voltage number entered from the Service List screen.
Gas Surcharge	The total price for the technician's cost of travel. This field can be edited.
Labor	The price of labor for servicing the ticket that was selected from the Tech Hours screen. This field can be edited.
Labor Hours	The labor hours selected at the Customer Billing screen. This displays the number of

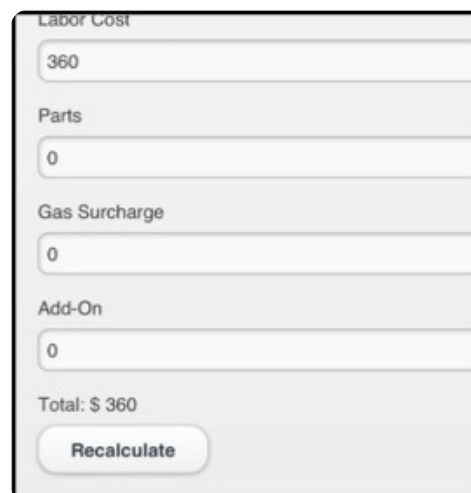
hours at which the technician serviced the ticket.

Miscellaneous	Displays the service options selected from the Service List screen.
Parts	The total price for the parts used for the ticket. This field can be edited.
Pay	Select to open the Payment Options screen.
Payment Action	The payment action selected from the Customer Billing screen. This displays whether the ticket was complete, incomplete, or no charge.
Payment Code	The payment code selected from the Customer Billing screen. This displays the type of service performed or the type of part replaced.
Payment Notes	Enter notes about the payment from the ticket.
Rate Code	The rate code selected from the Customer Billing screen. This displays the rate at which the account will be billed.
Reschedule Date	Displays the reschedule date selected from the Customer Billing screen if Incomplete was selected as a Payment Action .
Services Explained	Displays the explanation of the ticket service entered from the Service List screen. This field can be edited.
Total	The total price of the bill for the ticket.
Work Performed	Displays the summary of work performed for the ticket, entered from the Service List screen. This field can be edited.

To edit the **Payment** screen, complete the following steps:

NOTE: The **Recalculate** option can be selected to ensure the proper price is shown.

1. Edit any necessary information within the given text fields (Figure 60).
 - If **Labor**, **Parts**, **Gas Surcharge**, or **Add-On** are modified, the total will change according to the new changes.



The screenshot shows a mobile application interface for calculating labor costs. It features four input fields stacked vertically: 'Labor Cost' with the value '360', 'Parts' with '0', 'Gas Surcharge' with '0', and 'Add-On' with '0'. Below these fields, the 'Total' is displayed as '\$ 360'. At the bottom of the form is a button labeled 'Recalculate'.

(Figure 60)

2. Select **Pay** to display the **Verify Charges** screen.
3. Select **Confirm** to continue to the next screen (Figure 61).
 - Select **Close** to return to the **Payment** screen.

Verify Charges	
Hours:	5.55 Hour(s)
Labor Cost:	\$ 88
Parts:	\$ 0
Travel:	\$ 0
Total:	\$ 88

Confirm

Close

(Figure 61)

Payment Option

Payment Options provides the following types of payment options to pay for a service ticket:

- Credit Card
- Debit Card
- Check
- Cash
- Payment Information On File

To enter payment information, complete the following steps:

NOTE: If an account already on file has been selected, the customer must verify the information displayed on the screen.

1. Select a method of payment.
 - If there is a payment account on file, select the checkbox to allow system verification.
2. Enter required information in all the given fields.
 - Refer to the following figures and tables for the appropriate field descriptions.
3. Select **Sign** to continue to the **Signature** screen.
4. Select **OK** to accept the successful payment.

Credit Card Option Screen

When using the **Credit** option, all fields must be entered before a signature can be collected (Figure 62).

NOTE: Fields that are left blank or entered incorrectly will highlight in red after **Sign** has been pressed.

Payment Options

Credit ▼

☐ Authorize payment with information on file.

Credit First Name:

Credit Last Name:





Credit Number:

Credit Expire Month:

Credit Expire Year: (YYYY)

Credit Name: (As seen on card)

Credit ZIP Code:

Select One:





- Credit Number is blank!

Sign ✓

(Figure 62)

Field	Description
Authorize Payment with Information on File	Select the checkbox to authorize the use of a credit card or checking account saved on file.
Credit Expire Month	The month the credit card expires.
Credit Expire Year	The year the credit card expires.
Credit First Name	The first name on the credit card used for payment.
Credit Last Name	The last name on the credit card used for payment.
Credit Name	The full name of the card's owner spelled out as it is on the credit card.
Credit Number	The credit card number used for payment.
Credit Type	The type of credit card used for payment.
Credit ZIP Code	The billing ZIP code for the credit card.

Debit Card Option Screen

When using the **Debit** option, all fields must be entered before a signature can be collected (Figure 63).

NOTE: Blank or incorrectly entered fields will highlight red after **Sign** has been pressed.

The screenshot shows a 'Payment Options' screen. At the top, there's a dark header with the title 'Payment Options'. Below it, a light gray bar contains the word 'Debit' and a downward arrow icon. Underneath, there's a checkbox labeled 'Authorize payment with information on file.' followed by five input fields: 'Bank Name:', 'Security Code (3 digits)', 'Bank Account:', 'Bank Routing:', and an unlabeled field at the bottom. A 'Sign' button with a checkmark icon is located in the bottom right corner.

(Figure 63)

Field	Description
Authorize Payment with Information on File	Select the checkbox to authorize the use of a credit card or checking account saved on file.
Bank Account	The customer's bank account number.
Bank Name	The name of the bank where the account is located.
Bank Routing	The bank routing number.
Security Code	The three-digit number located on the back of the card.

Check Option Screen

When a check is being used as payment, accept the check and select **Sign** to continue to the signature screen (Figure 64). When the customer signs the **Signature** screen, they are authorizing the check to be used as payment.

NOTE: Be sure the check is filled out completely, including a signature, as the **Check** screen does not include fields for check information to be entered.

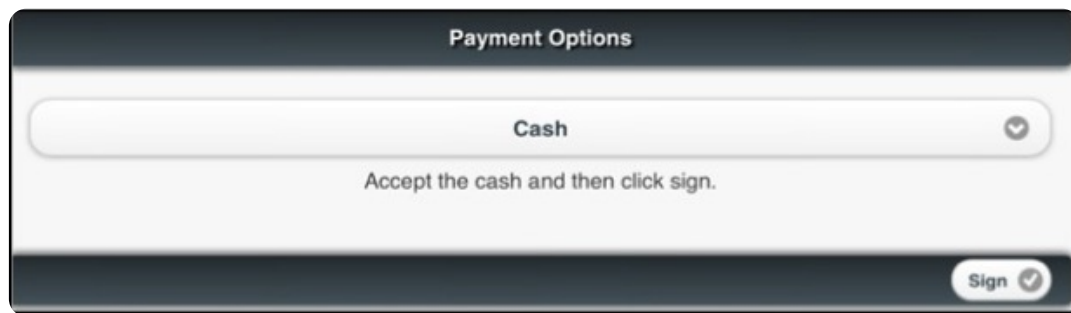
The screenshot shows a 'Payment Options' screen. At the top, there's a dark header with the title 'Payment Options'. Below it, a light gray bar contains the word 'Check' and a downward arrow icon. Underneath, the text 'Accept the check and then click sign.' is displayed. A 'Sign' button with a checkmark icon is located in the bottom right corner.

(Figure 64)

Cash Option Screen

When cash is being used as payment, accept the cash and select **Sign** to continue to the signature

screen (Figure 65). When the customer signs the **Signature** screen they are authorizing the cash to be used as payment.

The image shows a software interface titled "Payment Options". It features a large, light-colored button labeled "Cash" with a small downward arrow icon on its right side. Below this button, the text "Accept the cash and then click sign." is displayed. At the bottom right of the interface, there is a "Sign" button with a checkmark icon.

(Figure 65)

Additional Services, Signature, and Invoice

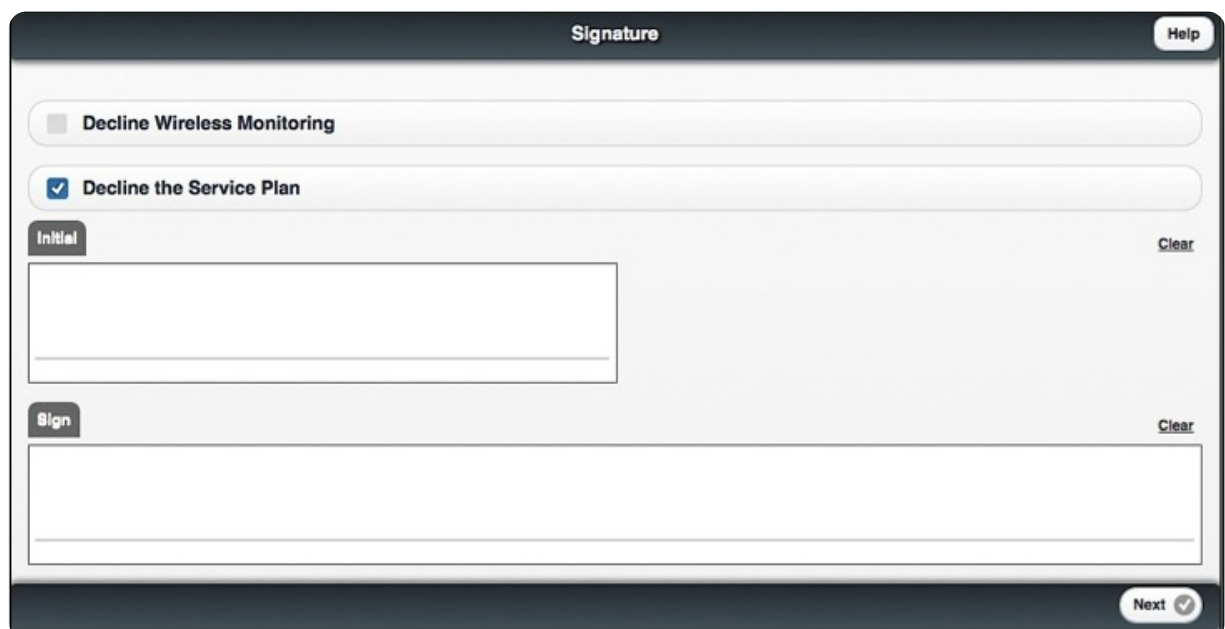
Before the signature of acceptance for services is finalized, and depending on company configurations, there may or may not be the option for the customer to add additional services. If additional services are offered, those services will automatically be listed. The customer also has the option of declining additional services.

Additional Services

To decline additional services and begin generating the invoice, complete the following steps:

NOTE: The service checklist options will vary greatly, depending on customer account and/or central station configurations.

1. Add a checkmark to the checkbox if the customer wants to decline a listed service (Figure 66).
 - The boxes must be checked to decline services.
2. Ask the customer to initial the signature boxes displayed if a service was declined.
3. Each service will have its own signature box.
4. If services are not declined, the customer is not required to initial.

The image shows a software interface titled "Signature". In the top right corner, there is a "Help" button. Below the title, there are two checkboxes: "Decline Wireless Monitoring" (unchecked) and "Decline the Service Plan" (checked). Below these checkboxes, there are two signature boxes. The first box is labeled "Initial" and has a "Clear" button to its right. The second box is labeled "Sign" and also has a "Clear" button to its right. At the bottom right of the interface, there is a "Next" button with a checkmark icon.

(Figure 66)

Signature

After the payment has been entered in the **Payment Options** screen, the payment has been approved, and options for additional services have been handled, a signature from the customer must be captured to authorize the payment and confirm that the ticket has been serviced. Complete the following steps to capture a signature:

1. Ask the customer to sign within the signature box.
 - The **Clear** hyperlink can be selected to clear the signature box.
2. Select **Next** to generate an invoice for the ticket.

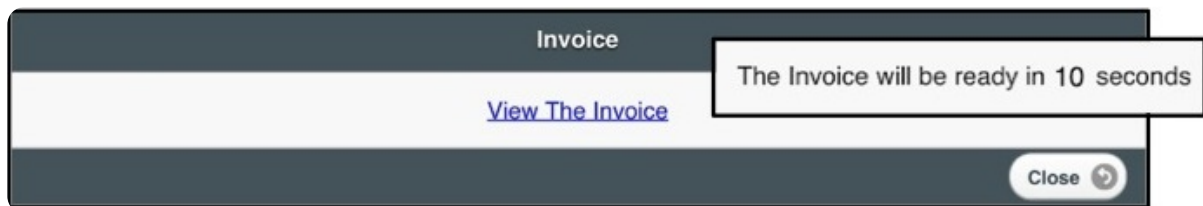
Invoice

After capturing a signature from the customer, an invoice will generate and save to a folder on the company's server. If the application is being used on a phone, the invoice can be printed and emailed by using the **Adode Viewer App**.

To view the invoice, complete the following steps:

1. Select **View The Invoice** to generate a view of the invoice (Figure 67).
2. The application may inform you it will take ten seconds until the invoice is ready before displaying the **View The Invoice** hyperlink.

NOTE: Select **Close** if you do not wish to view the invoice and select **OK** to confirm ticket completion.



(Figure 67)

After the invoice is created, the ticket will be closed and/or transferred and will no longer appear within the **Ticket List** screen. A sample invoice is shown below (Figure 68):

TESTING COMPANY SYSTEMS

3715 Madison Avenue, Suite 755
Chicago IL 87931
Phone (432) 555 - 4824
N. IL (432) 555. 3805
Fax (432) 555 - 4759
www.testingcompany.com

ACCOUNT NUMBER: ANDYTEST
RADIO NUMBER:
INVOICE NUMBER:

SERVICE WORK ORDER AGREEMENT

SERVICE TICKET NUMBER

SUBSCRIBER'S NAME ANDREW HAEGER					13438	
ADDRESS 1410 S VALLEY CENTER DRIVE			CITY BAY CITY	STATE MI	ZIP 48706	DISPATCHED
HOME	OFFICE/CELL (989) 555 - 8530	VOIP	Voltage 237	MAP GRID MAP	ARRIVED 10:00 AM	
SERVICE PERSON AJH	ON TEST OPER	CALL WAITING	RADIO TESTED RJ31X INST.	DATE 10-04-2012	COMPLETED 12:00 PM	
PANEL TYPE XH-349877	RADIO TYPE TESTING ID4	DSL	STICKERS	YARDSIGNS	RESCHEDULED DATE	TOTAL TIME 2 HOURS

SERVICE EXPLANATION

The rear motion detector was replaced and all other site motion detectors were checked.

WORK PERFORMED

The rear motion detector was first checked for failure and was then replaced. All additional motion detectors on the site were checked for failure. The remaining motion detectors were not faulty, therefore they were not replaced.

PART DESCRIPTION	PART NUMBER	QUANTITY		PRICE EACH	TOTAL
		INTO JOB	OUT TO TRUCK		
motion detector	001538	1		250.00	250.00

REPAIR

Some subscribers have contracted for "REPAIR". Please refer to your Alarm Service Agreement, Paragraph "D" for explanation of service.

FURTHER INFORMATION

Certain features of subscribers security (ie. interior protection, glass sensors, motion detectors) may be shut off during servicing or whenever main power is turned off, it is subscribers responsibility to check security system and restore it (at subscribers option) above stated features or functions. Subscriber, by their (or their agents) signature acknowledges the above work has been performed satisfactorily and they (the subscriber) accepts and understands the company's service terms, rates and policies and that such work is subjected to the terms and conditions of the Alarm Service Agreement. Additional terms and conditions See Reverse Side

SUBSCRIBER'S DUTIES AND RESPONSIBILITIES - It is the sole and absolute responsibility of the Subscriber to (i) confirm that the Telephone Equipment is compatible with the System, especially when there are changes to the Telephone Equipment or services rendered to Subscriber by the telephone company, i.e., call waiting, Centrex telephone system, answering machines, adding DSL or similar services etc., and (ii) test the equipment periodically, at least monthly and whenever changes are made to telephone service for the Premises. Any claimed inadequacy or failure of the equipment shall be immediately reported to Company for repair service. Subscriber understands voice over internet (VoIP) and or digital phone service may be less reliable and Company does not recommend.

ADDITIONAL TERMS AND CONDITIONS - See Reverse Side

THIS IS A COPY OF YOUR INVOICE, AN INVOICE WILL ALSO BE E-MAILED TO YOU.

☐ Authorize payment with credit card or checking account on file.

☐ Decline Wireless Monitoring

☐ Decline Service Plan

RATES**

- REGULAR (includes trip* & processing charge)
Monday-Friday 8:00 am - 4:30 pm \$79.95 First 1/2 Hr.
- EMERGENCY
Holidays, weekends & after 4:30 pm \$89.95 First 1/2 Hr.
- OTHER
- MATERIAL CHARGES
- GASOLINE SURCHARGE

TERMS: Due upon completion
If not paid by , pay this amount
Total Charges Due
Amount Received

**Rates subject to change without notice

BY PROVIDING MY CREDIT CARD NUMBER OR BANK ACCOUNT NUMBER TO TESTING COMPANY SYSTEMS, I UNDERSTAND THAT CHARGES WILL BE BILLED TO MY CREDIT CARD NUMBER OR BANK ACCOUNT NUMBER IN ACCORDANCE WITH THE TERMS OF MY ALARM SERVICE AGREEMENT. I AUTHORIZE THIS AUTOMATIC BILLING BY TESTING COMPANY SYSTEMS. I UNDERSTAND THAT ALL CHARGES ARE CONSIDERED VALID UNLESS DISPUTED IN WRITING WITHIN THIRTY DAYS OF INVOICE DATE. I UNDERSTAND THAT TESTING COMPANY SYSTEMS SHALL NOT BE RESPONSIBLE FOR ANY CHARGES OR EXPENSES THAT I MAY INCUR RESULTING FROM EXCEEDING MY CREDIT LIMIT OR INSUFFICIENT FUNDS AS A RESULT OF AN AUTOMATIC CHARGE GENERATED BY TESTING COMPANY SYSTEMS PURSUANT TO THIS AUTHORITY.

Jon Thomas

Accepted by and Copy Received By SUBSCRIBER OR SUBSCRIBERS AGENTS SIGNATURE
NON PAYMENT OF THIS INVOICE MAY RESULT IN A 1 1/2 (15% ANNUAL) INTEREST CHARGE ADDED ON TO YOUR BALANCE

(Figure 68)