Infor SyteLine Service Mobile User Guide

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Contacting Infor

If you have questions about Infor products, go to Infor Concierge at https://concierge.infor.com/ and create a support incident.

The latest documentation is available from docs.infor.com or from the Infor Support Portal. To access documentation on the Infor Support Portal, select **Search > Browse Documentation**. We recommend that you check this portal periodically for updated documentation.

If you have comments about Infor documentation, contact documentation@infor.com.

Chapter 1: Service Mobile

About Online Mobile Service

The online mobile service includes forms designed to be run on a mobile device that is connected to the back office using the Web Client. Android and iOS devices are supported.

Process Flow

Upon opening the mobile service, the **Home Page - Service** form is displayed. Use this form as the starting point to perform work. Typically, a technician then opens the **Work Queue - Service** form and proceeds to work through the appointments listed. After selecting an appointment, the technician can perform these functions:

- Change the appointment status to update the back office scheduling board
- Clock on to begin tracking the time of an appointment
- Record labor, material, and miscellaneous expenses used on a service order
- Clock off to record the time spent at an appointment
- View customer and unit service history
- Provide a summary of the work performed, which can be viewed online by the customer
- Collect a signature from the customer
- Update the appointment status to Complete
- Create a new incident to log issues encountered while on-site
- Create a new appointment to schedule follow-up visits

Toolbar Buttons

The mobile forms include toolbar buttons that help you with common tasks.

These forms include toolbar buttons:

- **Home Page - Service**
- **Calendar - Service**
- **Work Queue - Service**
- **Appointment Detail - Service**
- **DataSearch**
- **Unit Details**

- **Customer Details**

Note: Each form has its own set of toolbar buttons; some are common across multiple forms and others are not.

This table lists and describes the toolbar options:

Toolbar button	Description
Refresh	Requeries and shows the selected collection using the current filtering criteria.
Sign Out	Signs out the current user.
User Information	Opens the **User Information** mobile form, which you can use to change your password, email address, or the full descriptive name associated with your user ID.
DataSearch	Opens the **Mobile DataSearch** form, where you can you can perform a quick search.
Back	Closes the current form and reloads the previous form.

Using the Home Page - Service Form

The **Home Page - Service** form is opened by default when you open the SyteLine mobile application.

This table describes the buttons available on the form:

Button	Description
User Information	Opens the **User Information** mobile form, where you can change your password and email address.
Work Queue	Opens the **Work Queue - Service** form, which lists all open appointments for the current partner.
Calendar	Opens the **Calendar - Service** form, which shows the current partner's appointments in a calendar view.
View Messages	Opens the **Inbox - Service** form, where you can see additional details about any messages that exist in the current partner's inbox.
Compose Message	Opens the **Send Message - Service** form, where you can send a new message.

The grid on the **Home Page - Service** form lists any messages that have been sent to the current user from the Application Event System.

Changing Your User Information (Mobile)

1. On the **Home Page - Service** form, select the **User Information** toolbar button to open the **User Information** mobile form.
2. In the **User Description** field, specify a new description for your User ID.
3. In the **User Password** field and **Confirm Password** field, specify the new password.
4. Set up multiple email addresses by selecting an **Email Type Description** and specifying the **Email Type Address**. Then, select the address to use as the **Primary Email Address**.
5. Select **OK** to save the changes, or select **Cancel** to close the form without saving.

Viewing Calendar Appointments

1. On the **Home Page - Service** form, select **Calendar**.

   The **Calendar - Service** form opens, listing the appointments for the current partner.
2. Select whether you want to view the calendar by day, week, or month.
3. To view additional information about an appointment, double-click or double tap an appointment to launch the **Appointment Detail - Service** form.
4. Optionally, select **Create Appointment** to launch the **New Appointment - Service** form, where you can create a new appointment. This feature is useful when a follow-up appointment is needed.

Searching the System with DataSearch

1. Select **DataSearch** in the toolbar to open the **Mobile DataSearch** form.
2. Specify the search value, which can include an asterisk (*) as a wildcard.
3. Select the parameters to use to interpret the search value:
   - Any of these words
   - All of these words
   - Contains
   - Begins with
   - Ends with
   - Exact Phrase
4. Optionally, specify which data sources to look in.
5. Select **Search**. Select **+** to expand any data source to view the list of results in a grid.

Using the Appointment Detail - Service Form

1 Open the **Appointment Detail - Service** form in one of these ways:
- On the **Calendar - Service** form, select an appointment record.
- On the **Work Queue - Service** form, select on an appointment record.

2 Optionally, update the status of the appointment as you perform work.

3 Optionally, use these hyperlinks in the Contact section:
- Select the customer name link to launch the **Customer Detail - Service** form.
- Select the contact phone number link to launch the device's phone dialer, if compatible.
- Select the appointment address to launch the device's default mapping application, if compatible.

4 Optionally, select the serial number hyperlink to launch the **Unit Detail - Service** form.

5 Optionally, specify a new note in the box.

Using the Buttons on the Appointment Detail - Service Form

Use the buttons on the top of the **Appointment Detail - Service** form as described in the table. The buttons displayed on the form change based on the reference of the current appointment. If the reference is a SRO, all buttons are displayed. If the reference is not a SRO, only the **New Incident** button, **New Appointment** button, and **Incident Reason/Resolution** button are displayed.

Button	Description
Clock On/Off	Select **Clock On/Off** to either clock on to an operation or clock off from an operation. If the user is not currently clocked on, selecting **Clock On/Off** will clock on the user and display the clocked on date and time. If the user is currently clocked on to the current SRO, selecting **Clock On/Off** opens the **SRO Labor Entry - Service** form, with the associated SRO, line, operation, and partner work code information displayed, and the duration of the work based on the time elapsed since the user clocked on. On a mobile handheld device, if the user is currently clocked on to a different SRO, a message is displayed that asks if you would like to clock on to the new SRO. If you select **Yes**, the **SRO Labor Entry - Service** form is opened, with the information described above. In the back office, or on other devices, if the user is currently clocked on to a different SRO, they are prompted to clock off the current SRO before the clock on time is captured for the new SRO.
Materials	Select **Materials** to open the **SRO Material Entry - Service** form, with the associated SRO, line, and operation information displayed. Use this form to record any inventory materials used while performing the work.
Labor	Select **Labor** to open the **SRO Labor Entry - Service** form, with the associated SRO, line, operation, and partner work code displayed. Use this form to record the amount of time required for an operation and the type of labor performed. You can bypass this step if utilizing the clock on/clock off functionality.
Miscellaneous	Select **Miscellaneous** to open the **SRO Miscellaneous Entry - Service** form, with the associated SRO, line, operation, and partner miscellaneous code displayed. Use this form to record any expenses, such as car rental, meals, or unexpected hardware purchases made while performing the service.

Button	Description
Reason/Resolution	Select **Reason/Resolution** to open the **SRO Reason/Resolution - Service** form or the **Incident Reason/Resolution - Service** form. Use these forms to edit and add reasons and resolutions for the selected SRO or incident.
Work Order	Select **Work Order** to open the **Work Order - Service** form, where you can view all of the material, labor, and miscellaneous expenses that have been entered for the selected SRO. You can also use this form to capture a signature from a customer.
Incident	Select **Incident** to open the **New Incident - Service** form. Use this form to record issues encountered while working on-site.
New Appointment	Select to open the **New Appointment - Service** form. Use this form to create a new appointment for the reference that is associated with the current appointment.

Entering Labor Transactions (Mobile)

1. On the **Appointment Detail - Service** form, select **Labor** to open the **SRO Labor Entry - Service** form.

   The SRO number and description are displayed.

2. Accept the default line and operation or select a new SRO line and operation.
3. Specify this information:

   Transaction Date
   Select the date of the transaction or accept the default of the current date.

   Work Code
   Select the work code to assign to the transaction. You can also open the **Standard Repair Time Filters** form, where you can search for work codes.

   Hours Worked
   Specify the number of hours of labor for the transaction.

   Hours Billed
   The number of hours worked is displayed by default as the number of hours billed. Optionally, specify a different number of hours billed.

   Notes
   Optionally, specify any notes for the transaction.

4 Select **Save**.
5 Optionally, select **Add** to enter multiple transactions.

The Labor Entered box lists all the transactions that have been entered.

Entering Material Transactions (Mobile)

1 On the **Appointment Detail - Service** form, select **Material** to open the **SRO Material Entry - Service** form.

   The SRO number and description are displayed.

2 Accept the default line and operation or select a new SRO line and operation.
3 Specify this information:

   Transaction Date
   Select the date of the transaction or accept the default of the current date.

   Item
   Select the item used in the transaction. You can also use the **Item Description** field to find the item by its description.

   Quantity
   Specify the number of items used in the transaction.

   U/M
   Select the unit of measure for the items.

   Notes
   Optionally, specify any notes for the transaction.

4 Select **Save**.
5 If the item is serial-tracked, specify the serial number(s) for the material that is being issued or returned in the S/N grid.
6 Optionally, select **Add** to enter multiple transactions.

The Labor Entered box lists all the transactions that have been entered.

Entering Miscellaneous Expenses (Mobile)

1 On the **Appointment Detail - Service** form, select **Miscellaneous** to open the **SRO Miscellaneous Entry - Service** form.

   The SRO number and description are displayed.

2 Accept the default line and operation or select a new SRO line and operation.
3 Specify this information:

Transaction Date
Select the date of the transaction or accept the default of the current date.

Miscellaneous Code
Select the miscellaneous code to assign to the transaction.

Quantity/Hours
Specify either the quantity of the material used or the number of hours for the transaction.

Cost
Specify the cost of the material transaction.

Payment Type
Select the payment type that is used for the transaction.

Notes
Optionally, specify any notes for the transaction.

4. Select **Save**.
5. Optionally, select **Add** to enter multiple transactions.

The Misc Expenses Entered box lists all the transactions that have been entered.

Adding a New Appointment (Mobile)

1. Open the **New Appointment - Service** form in one of these ways:
   - Select **New Appointment** on the **Appointment Detail - Service** form.
   - Select **Create Appointment** on the **Calendar - Service** form.

   The reference number and a description are displayed by default. If the form is opened from the **Calendar - Service** form, the reference is blank and will be treated as a Miscellaneous reference. If the form is opened from the **Appointment Details - Service** form, the current reference is used.
2. Specify this information:

   Appointment Type
   Select the type of appointment that you want to add.

   Appointment Status
   Select the status that you want to apply to the appointment.

   Appointment Start
   Select the date and time when you want the appointment to start.

   Hours
   Specify the number of hours that are required for the work.
3. Optionally, specify any notes regarding the appointment.
4. Select **Create**.

Adding a New Incident (Mobile)

1 On the **Appointment Detail - Service** form, select **Incident** to open the **New Incident - Service** form.

2 Specify this information about the incident:

Status
Select the status for the new incident, or accept the default status of Open.

Priority Code
Select the level of priority for the incident, or accept the default level.

Description
Specify a description of the incident.

Incident Notes
Specify any additional notes about the incident.

Unit
The unit selected for the appointment is displayed by default. Optionally, select a different unit for the incident. If you select a new unit, the item is updated accordingly.

Item
An item is displayed by default based on the unit.

3 The contact information is displayed by default. Optionally, select a different contact.

4 Optionally, specify this information related to the reason for the incident:

General Reason
Select the general reason for the incident. Reason codes are maintained on the **Service Reasons** back office form.

Specific
Select the specific reason for the incident.

Reason Notes
Specify any notes for the reason.

5 Select **OK**.

Viewing Customer Information (Mobile)

1 On the **Appointment Detail - Service** form, select the customer or contact name hyperlink to open the **Customer Detail - Service** form.

2 Review this information:

- Customer section: The customer name and address information.
- Contact section: The phone number and email address of the contact.
- **Units** tab: A list of the units currently assigned to the customer.

- **Incidents** tab: A list of the incidents logged by the customer.
- **Service** tab: A list of the service orders logged for the customer.
- **Invoices** tab: A list of the invoices logged for the customer.
- **Contracts** tab: A list of the contracts assigned to the customer.

3 Optionally, select the customer address hyperlink to view the address in the device's default map application.

4 Optionally, select the customer phone number hyperlink to call the number by using the device's phone dialer.

Viewing Unit Information (Mobile)

On the **Appointment Detail - Service** form, select the unit hyperlink to open the **Unit Detail - Service** form. This information is displayed:

- The unit number and item number and description are displayed in the Unit Detail section.
- If at least one warranty that is still active for the current date exists, the **Active Warranty** check box is selected by default.
- If at least one open contract line exists for the unit, the **Active Contract** check box is selected by default.
- The **Unit Configuration** tab lists the unit parts in a tree display.
- The **Owner History** tab lists the customer and consumer information related to the unit.
- The **Incidents** tab lists information related to any incidents logged.
- The **Service** tab lists SRO information related to the unit.
- The **Rental** tab lists rental and contract information for the unit, if applicable.

Adding a Reason/Resolution Note for a SRO (Mobile)

1. On the **Appointment Detail - Service** form, select **Reason/Resolution** to open the **SRO Reason/Resolution - Service** form, filtered for the current SRO.

   The SRO, line, and operation numbers and descriptions are displayed.

2. Select **Add**.
3. To add a reason note, select the general reason code to use. Reason codes are maintained on the **Service Reasons** back office form.
4. Optionally, select a specific reason code.
5. In the Reason Notes box, specify any notes describing the reason for the service order.
6. To add a resolution note, select the general resolution code to use. Resolution codes are maintained on the **Service Resolutions** back office form.
7. Optionally, select a specific resolution code.
8. In the Resolution Notes box, specify any notes describing how the service order was resolved.
9. Select **Save**.

Adding a Reason/Resolution Note for an Incident (Mobile)

1. On the **Appointment Detail - Service** form, select **Reason/Resolution** to open the **Incident Reason/Resolution - Service** form, filtered for the current incident.

   The SRO, line, and operation numbers and descriptions are displayed.
2. Select **Add**.
3. To add a reason note, select the general reason code to use. Reason codes are maintained on the **Service Reasons** back office form.
4. Optionally, select a specific reason code.
5. In the Reason Notes box, specify any notes describing the reason for the service order.
6. To add a resolution note, select the general resolution code to use. Resolution codes are maintained on the **Service Resolutions** back office form.
7. Optionally, select a specific resolution code.
8. In the Resolution Notes box, specify any notes describing how the service order was resolved.
9. Select **Save**.

Capturing a Signature (Mobile)

1. On the **Appointment Detail - Service** form, select **Work Order** to open the **Work Order - Service** form.

   The SRO number, description, and start date are displayed.
2. Select the **Signature** tab.
3. Instruct the customer to sign their name in the box.
4. Select **Accept**.

Using the Inbox - Service Form

1. On the **Home Page - Service** form, select **View Messages** to open the **Inbox - Service** form.

   The grid lists all the messages in the current partner's inbox.
2. Select a record in the grid to view detailed information about the message.

   The **Message** tab shows basic details about the selected message.
3. The **Response** tab is enabled if the message was sent from an Application Event that requires a response from the recipient. Typically, the question to which recipients might be asked to respond is presented in the **Question** field. Select the correct response from the **Choices** options.

   For messages generated by the system in response to an event handler, the **Variables** tab shows information about any event variables associated with that event handler.

4 Optionally, select **Mark As Read** to mark the selected message as having been read. The message will no longer be bold in the grid.

5 Optionally, select **Reply** to reply to the sender. The **Send Message - Service** form is opened with the To and Subject lines populated.

6 Optionally, select **Reply All** to reply to the sender and anyone else included in the message. The **Send Message - Service** form is opened with the To, CC, and Subject lines populated.

Sending a Message (Mobile)

1 To send a new message, on the **Home Page - Service** form, select **Compose Message** to open the **Send Message - Service** form.

2 To send a reply or reply all, on the **Inbox - Service** form, select **Reply** or **Reply All** to open the **Send Message - Service** form.

   The **To**, **Subject**, and **CC** (if applicable) fields are populated by default.

3 In the **To** field, select the recipient for your message.

4 Select **Add**. The name of the recipient is displayed. Do this for each recipient.

5 Optionally, select the user who you want to include as a secondary (CC) recipient.

6 Select **Add**. The name of the CC recipient is displayed.

7 Specify a subject line, category, and message.

8 Optionally, select **Save In Sent Items Folder** to save a copy of the message.

9 Select **Send**.

Authorizing a Credit Card (Mobile)

1 On the **Work Order - Service** form, select **Authorize Credit Card** to open the **Credit Card Authorization** form.

2 Specify this information:

   Store For Future Orders
   Select this check box to save the information in the back end system for future use.

   Card Number
   Specify the 16-digit number listed on the front of the customer's credit card. If the credit card has been used and stored by the customer previously, you can select the number from the drop-down list.

   Street, City, Prov/State, Postal/Zip
   Specify the billing address information for the card holder.

   Expiration Date
   Specify the card expiration date in the form MM/YY.

Name On Card
Specify the card holder's name exactly as it appears on the credit card.

CV Number
Specify the 3-digit security number on the back of the card.

3 To capture a signature, instruct the customer to sign in the box.
4 Select **Accept** or **Clear** for the signature.
5 Select **Authorize**.

Chapter 2: Mobile Forms

Home Page - Service

Use this form as a starting point when using the mobile service. This form is opened by default when starting the mobile application.

User Information

Use this form to change your password, email address, or the full descriptive name associated with your user ID. You cannot change your user ID.

Calendar - Service

This form shows the appointment records for the current partner in a calendar format. This format is intended for use by service organizations that schedule their work for a specific date and time as opposed to using a queue.

You can view the calendar by day, week, or month. Selecting an appointment block opens the **Appointment Detail - Service** form, where you can view additional information and perform service activities.

Mobile DataSearch

Use this form to search for information within the application. The search results are displayed, initially grouped by data source. The Count column indicates how many records in the data source include the search term.

Appointment Detail - Service

Use this form to view information about an appointment. This form is the primary mobile form to use when working on-site.

This information is displayed in the Appointment section:

- Reference number (the incident number, service order number or miscellaneous reference associated with the appointment)
- Appointment start date, time, and duration
- Appointment description
- Reference description

This information is displayed in the Contact section, if applicable:

- Customer name
- Contact name and phone number
- Address of the appointment

This information is displayed in the Unit Detail section, if applicable:

- Serial number
- Item number
- Unit description

  If the reference of the appointment is linked to a service order that contains multiple lines, an icon is displayed in this section, which allows you to switch between the different units. See the **Browse Units - Service** form for more details.

The Appointment Notes section lists any notes associated with the appointment.

SRO Labor Entry - Service

Use this form to enter labor transactions for a specific SRO, line, and operation.

Open this form by clicking **Clock On/Off** or **Labor** on the **Appointment Detail - Service** form.

SRO Material Entry - Service

Use this form to enter transactions for the materials used on a SRO, line, and operation.

Open this form from the **Appointment Detail - Service** form.

SRO Miscellaneous Entry - Service

Use this form to enter miscellaneous expenses incurred for a SRO, line, and operation.

Open this form from the **Appointment Detail - Service** form.

New Appointment - Service

Use this form to create a follow-up appointment or a new miscellaneous appointment while on-site.

Open this form from the **Appointment Detail - Service** form or the **Calendar - Service** form.

New Incident - Service

Use this form to create a new incident to record unexpected issues that are encountered while on-site.

Open this form from the **Appointment Detail - Service** form.

Customer Detail - Service

Use this read-only form to view additional information for the customer and ship to that are associated with the current SRO.

Open this form by clicking the customer or contact hyperlink on the **Appointment Detail - Service** form.

Unit Detail - Service

Use this read-only form to view additional information about the selected unit on a SRO.

Open this form from the **Appointment Detail - Service** form.

SRO Reason/Resolution - Service

Use this form to add reason and resolution notes for a service order. These notes are used to describe the reason for the service order and how it was resolved.

Open this form from the **Appointment Detail - Service** form.

Incident Reason/Resolution - Service

Use this form to add reason and resolution notes for an incident. These notes are used to describe the reason for the incident and how it was resolved.

Open this form from the **Appointment Detail - Service** form.

Work Order - Service

Use this form to view a list of the material, labor, and miscellaneous transactions for a SRO, and to capture a signature from a customer. You can use the date at the top of the form to filter which transactions are displayed. Select a transaction to see more detail and to edit any transactions that have not been previously posted.

The **Authorize Credit Card** button to opens the **Credit Card Authorization** form.

Open this form from the **Appointment Detail - Service** form.

Inbox - Service

Use this form to view all messages for a partner. From this form, you can send messages using the **Send Message - Service** form.

Send Message - Service

Use this form to send messages. Typically, you will open this form from the **Home Page - Service** form or the **Inbox - Service** form.

Credit Card Authorization

Use this form to authorize a credit card.

Open this form by selecting **Authorize Credit Card** on the **Work Order - Service** form.

Note: The CenPOS credit card system is not currently supported for mobile authorization.

Browse Units - Service

In many service scenarios, a partner is scheduled for a service order that contains multiple units. Use this form to select which unit to apply any material, labor, or miscellaneous expense toward. This form is opened from the **Appointment Detail - Service** form, but is only visible if the reference on the appointment is to a service order header that has multiple units associated with it.

Note: If the appointment reference is to a specific service order line, the button is hidden.

Mobile Notes - Service

Use this form to view, add, delete, and modify notes for a selected record.

Select the **Add** button in the toolbar to add a new note. The current date and time are used by default as the subject. Select the **Internal** check box for the notes that you do not want printed on external documents. Use the **Delete** button to delete the selected note.

Work Queue - Service

This form lists all open appointments for the current partner in a queue view. The information on this form is read-only and includes summary information about the appointment, such as the customer's name, a description of the service order and appointment, and the estimated duration for the appointment. Selecting a record opens the **Appointment Detail - Service** form.