



# Eaco FieldWorker App

## USER GUIDE

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# INTRODUCTION

***"The successful warrior is the average man, with laser-like focus" - Bruce Lee***

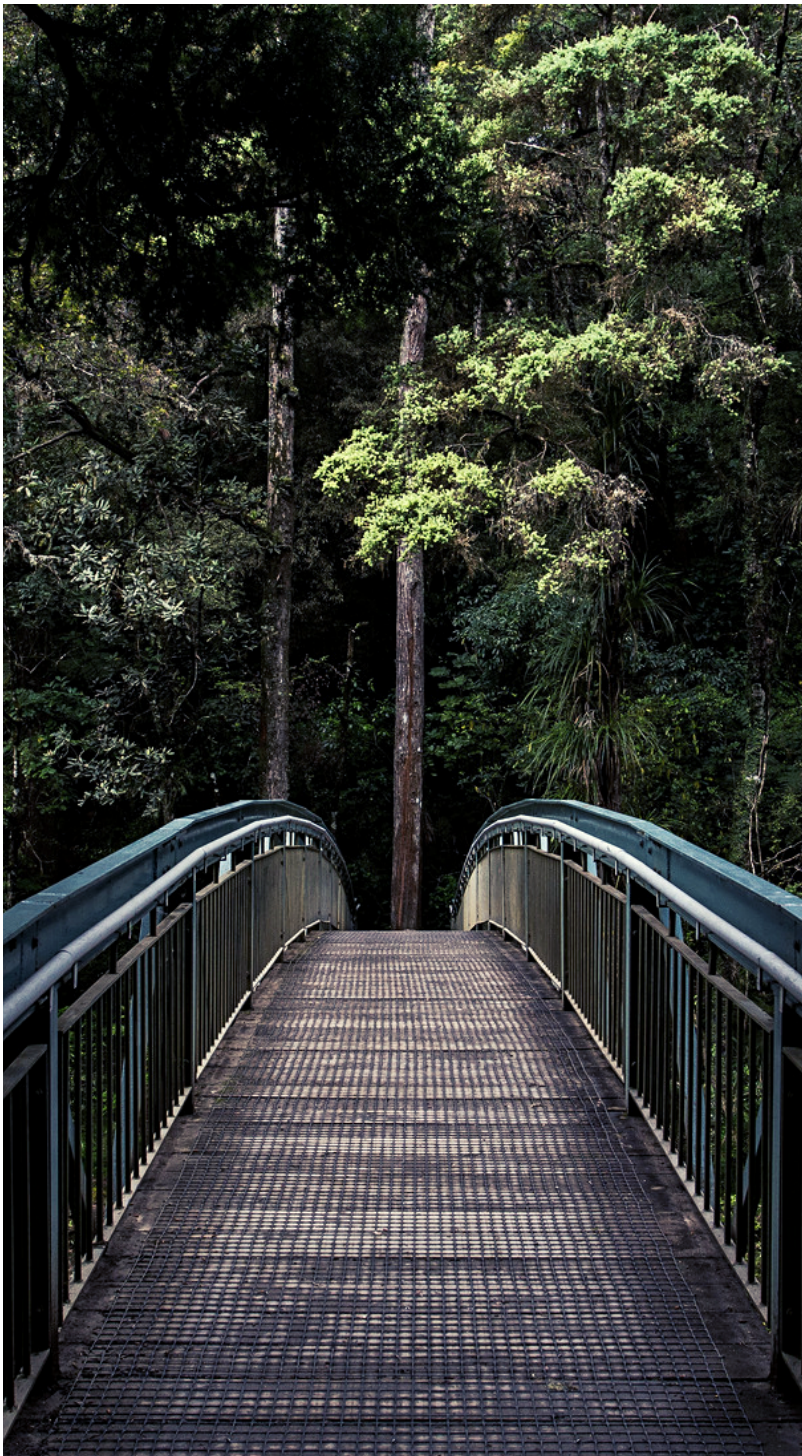
Culture is King and nailing it, is critical to business success. A key and crucial contributing factor to getting "it" right, lies in an organisation establishing an environment that gives workers confidence they are performing work to the satisfaction of all stakeholders, which in turn will ultimately have them feeling fulfilled. Feeling like they have made a contribution.

Often, an organisation achieves this through the provision of solid works and tasks management instruction and guidance and this is why the Eaco FieldWorker App is considered one of the most powerful tools you can arm your business and workers with.

From task management to real-time collaboration and location tracking functionality, the FieldWorker App acts as a bridge between you, your staff and sub-contractors by enabling you to allocate and manage work no matter where they are located.

Eaco's power lies in the ability to distribute work more effectively, whilst also providing virtual visibility for the manager to ensure that field technicians are safe and performing their functions in accordance with business processes. To achieve this, the Eaco FieldWorker App helps to: automate job information; plan and guide technicians/field workers through each job; and also, to act as a Point of Delivery (POD) capture tool.

#thefrontlinematters

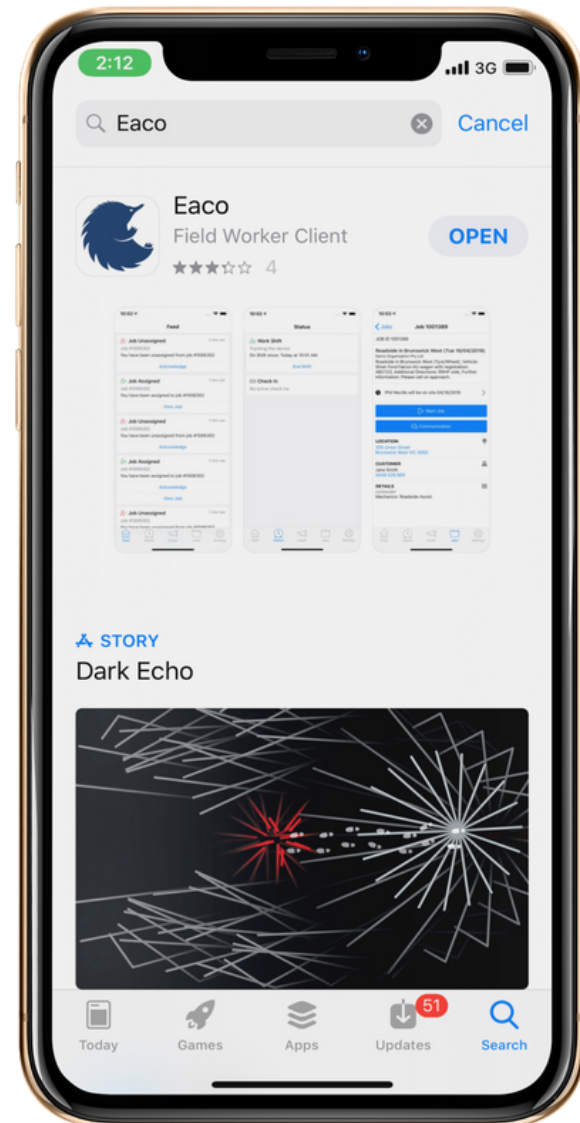


# 1. DOWNLOAD THE APP

You will be invited to open an Eaco account through the management web portal.

This invitation will send you an SMS and an email welcoming you to download the App from either the Apple App Store or for android users via Google Play.

Click the link in the SMS or email to be directed to the relevant App Store and download the App accordingly.



## 2. MOBILE PHONE SETTINGS

Each phone is different - the Eaco Apps are designed to look exactly the same in both Apple and Android Smartphones. Please accept that these instructions are general and that you will need to become familiar with your own phone or device.

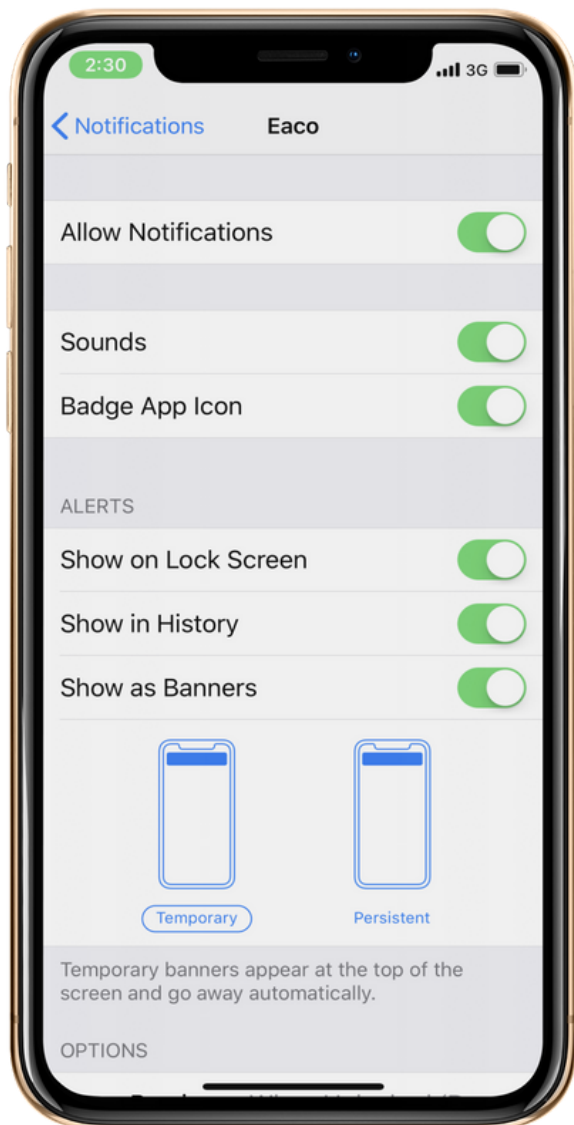
1. Ensure you have Location Services or Share My Location turned ON.
2. Turn ON Notifications for Eaco.
3. Background App Refresh for Eaco should be ON.
4. Mobile Data should also be ON.

You are now ready to use the Eaco App to manage your jobs. Our design is clean, modern and powerful, enabling allocated Jobs to be completed quickly and efficiently.

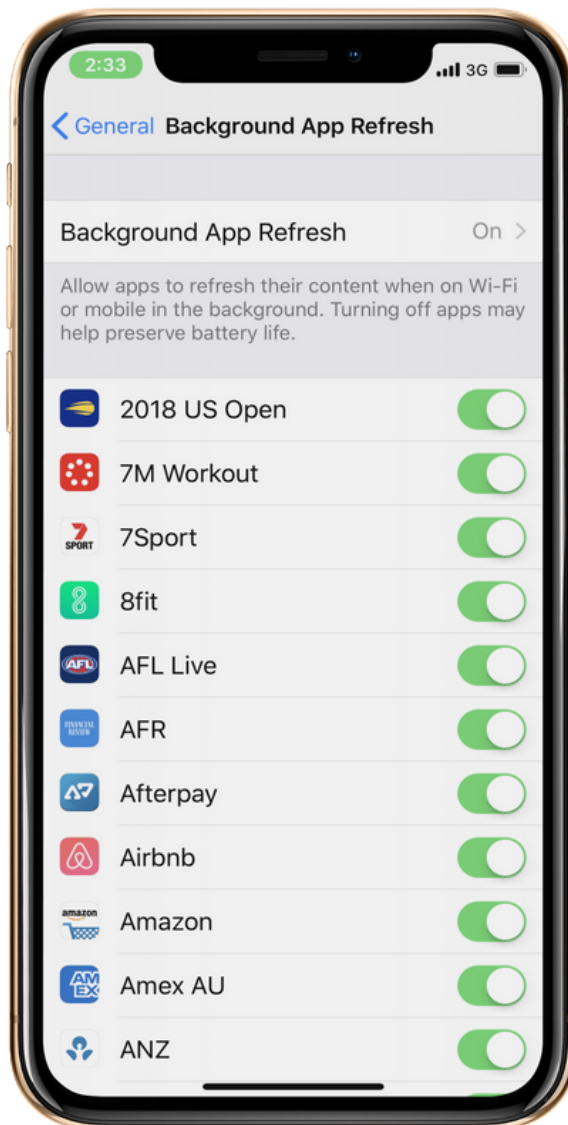
The Eaco App will send the details of the job, customer information and directions to the technicians/field workers, whilst also providing the technicians/field workers with PODs and the security of real-time location tracking.



1. Ensure you have Location Services or Share My Location turned ON.



2. Turn ON Notifications for Eaco.



3. Background App Refresh for Eaco should be ON.

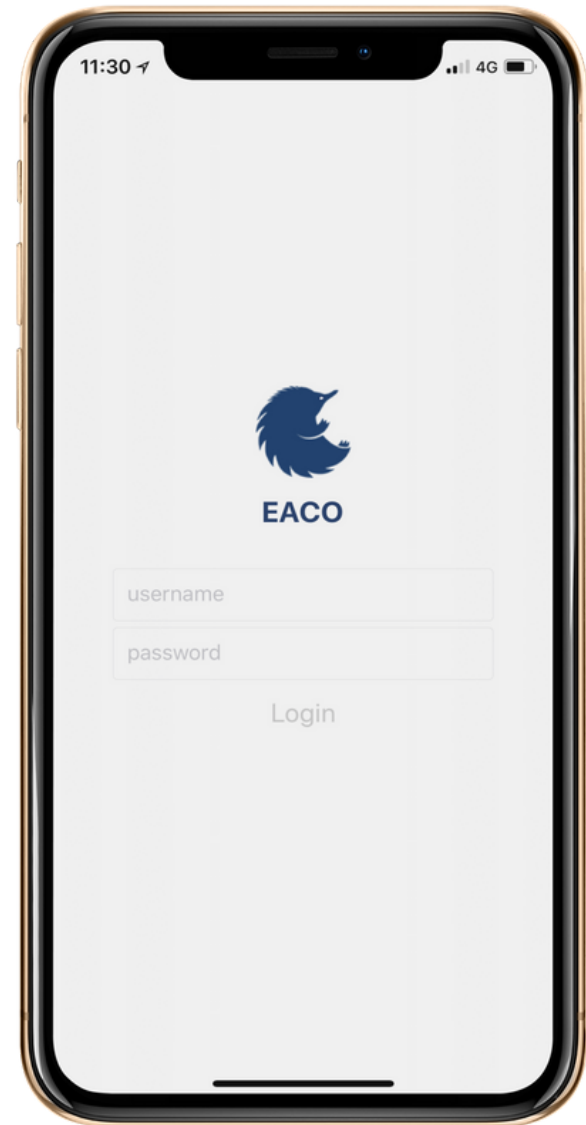


4. Mobile Data should also be ON.

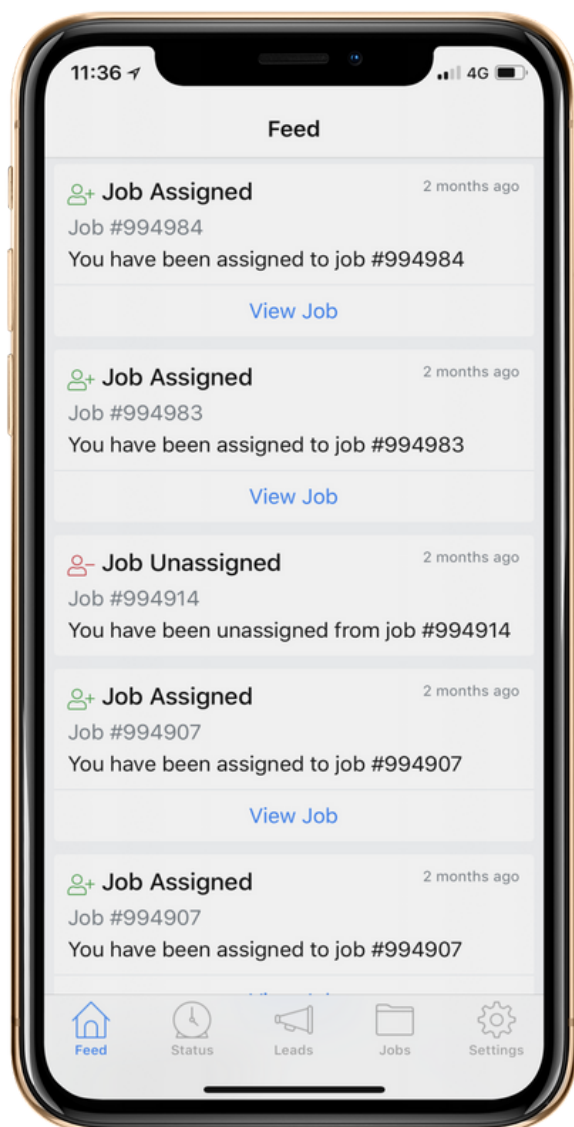
# 3. A JOB: FROM START TO FINISH

Log in to the Eaco FieldWorker App.

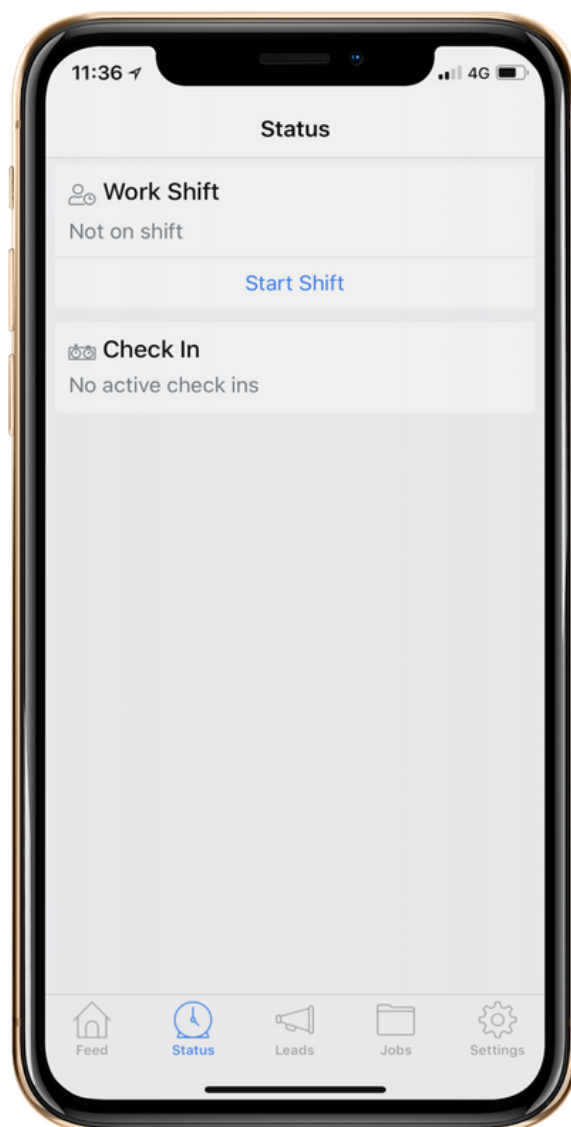
When you access the App with your personal Username and Password, you will have the same permissions as those set by your organisation's Eaco Administrator.



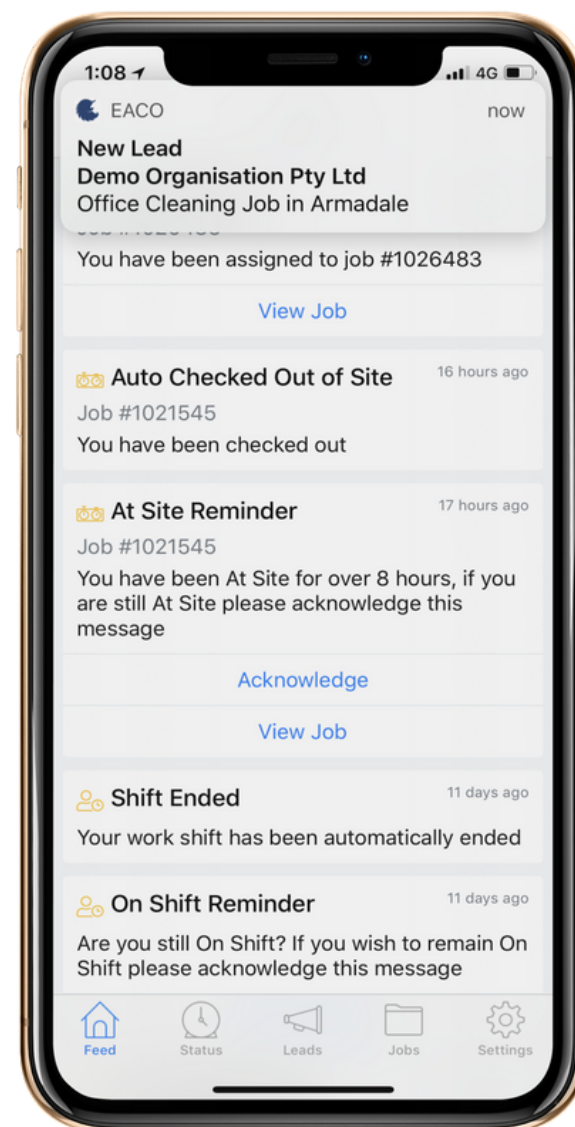
1. Eaco FieldWorker App Log In Screen



2. Upon logging in, FieldWorker's App view will default to the **Feed** screen, which provides a live running view of job activity.



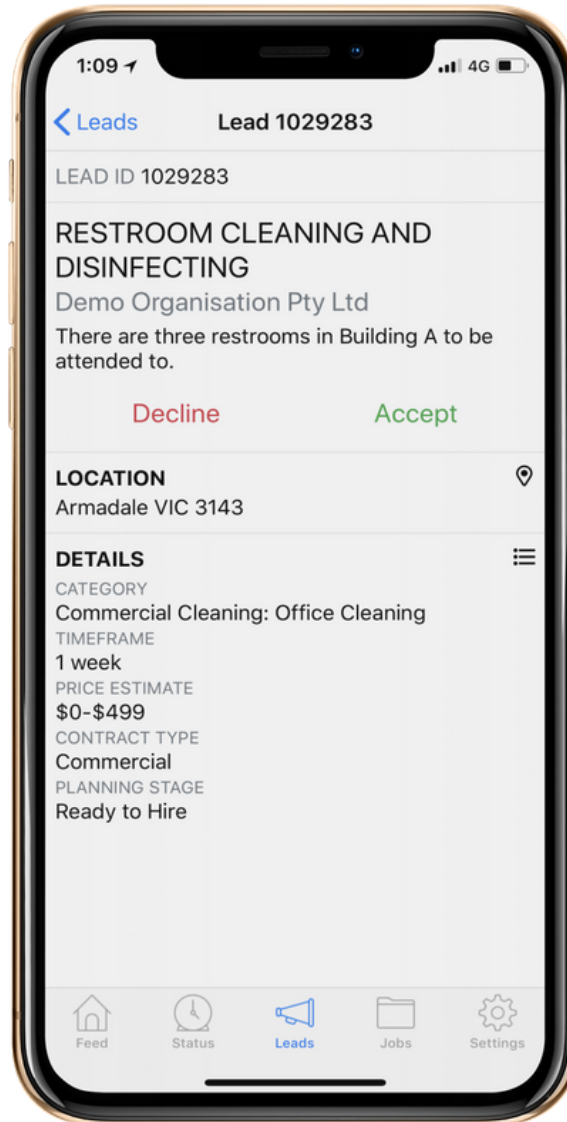
3. The **Status** screen is where the Field Workers can place themselves "on shift" by **tapping the Start Shift button**. This screen will also provide an overview of any jobs the Field Worker is currently checked in to.



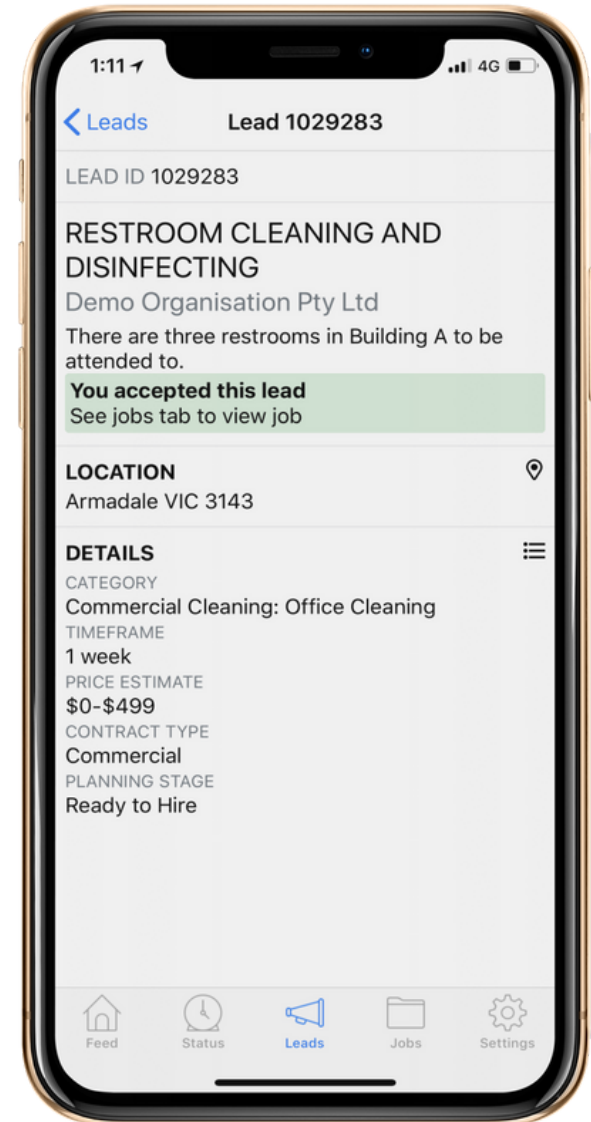
4. When a new job lead comes through, a **notification banner** will appear at the top of the screen.



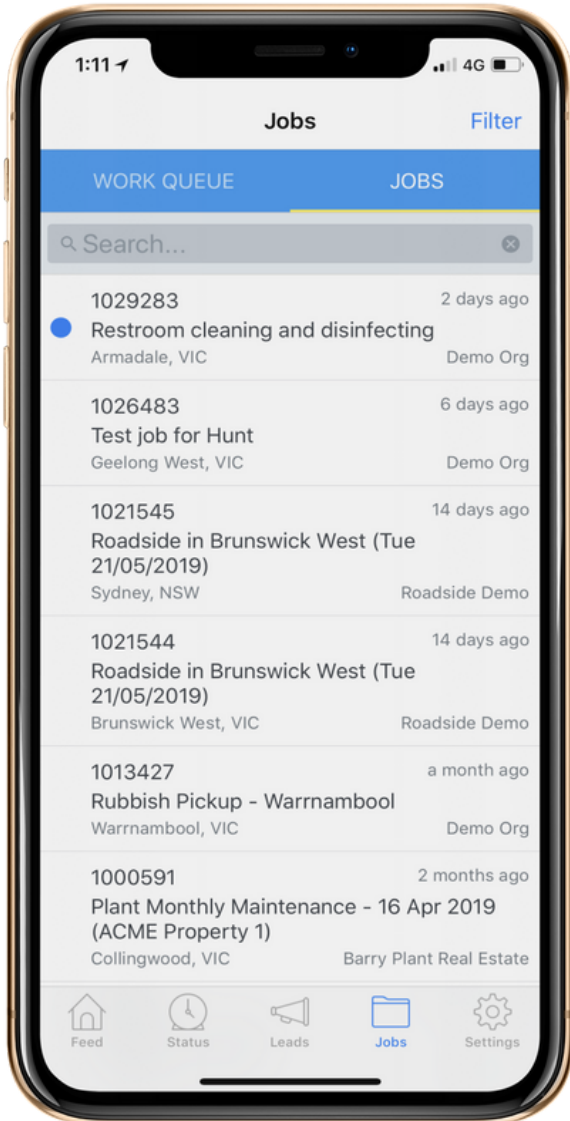
5. The **Leads** screen is dedicated to listing all open leads that are available to the Field Worker to Accept or Decline. Tap on a listed lead to open it for further action.



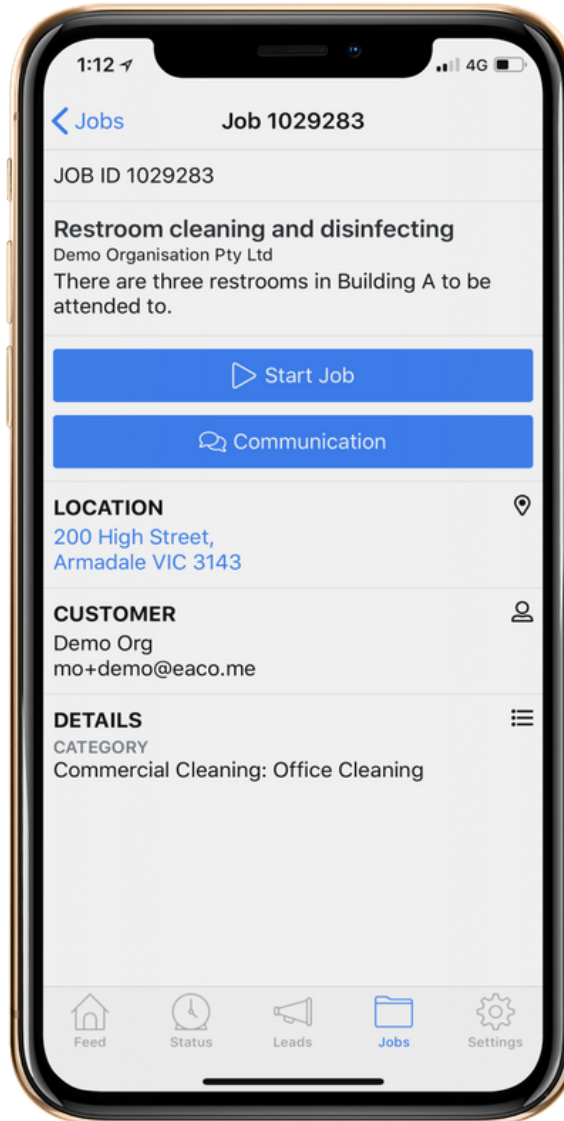
6. This is the view upon opening a lead for further action. **Tap Accept or Decline to confirm whether job is to be taken up or not.**



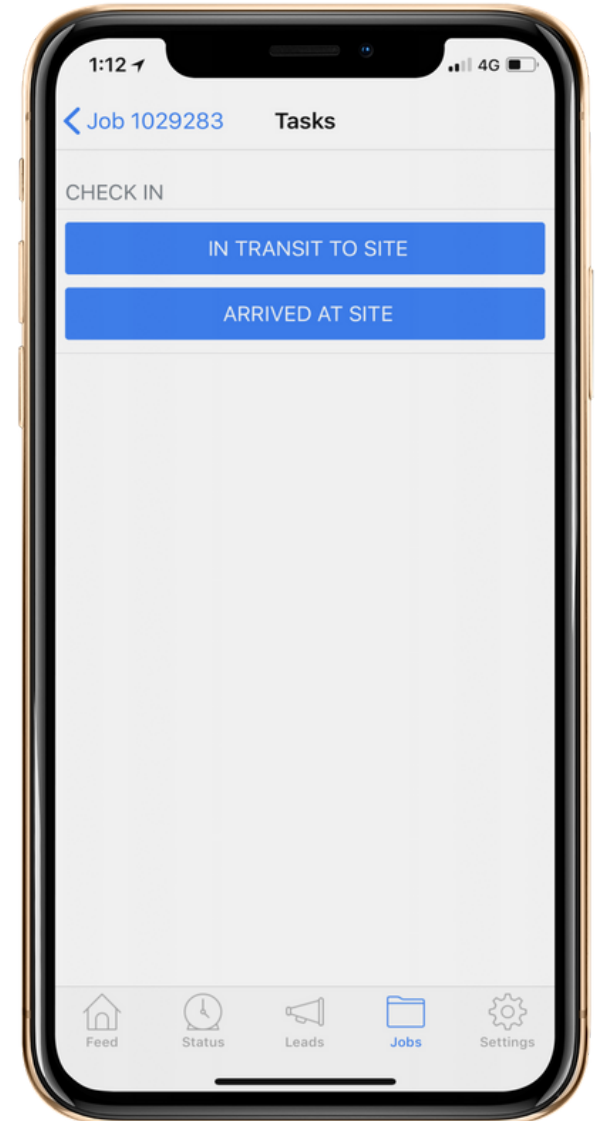
7. Confirmation of a Lead accepted will appear in a **green coloured banner**.



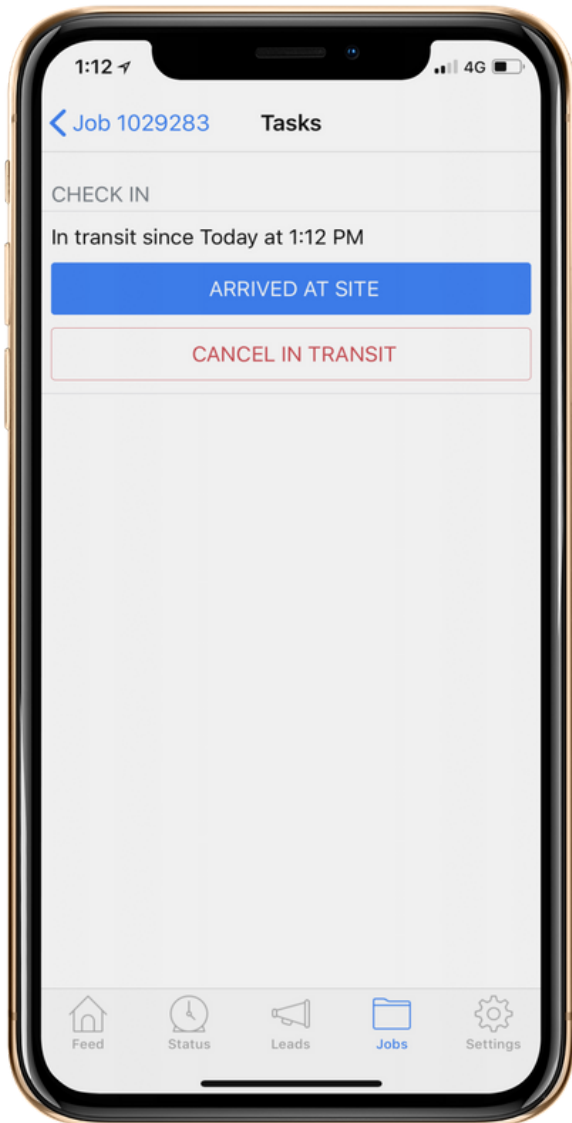
8. The **Jobs** screen provides a feed style overview of all accepted jobs. Any unopened Jobs will appear noted with a **solid blue dot**. Tap to view the details of a Job.



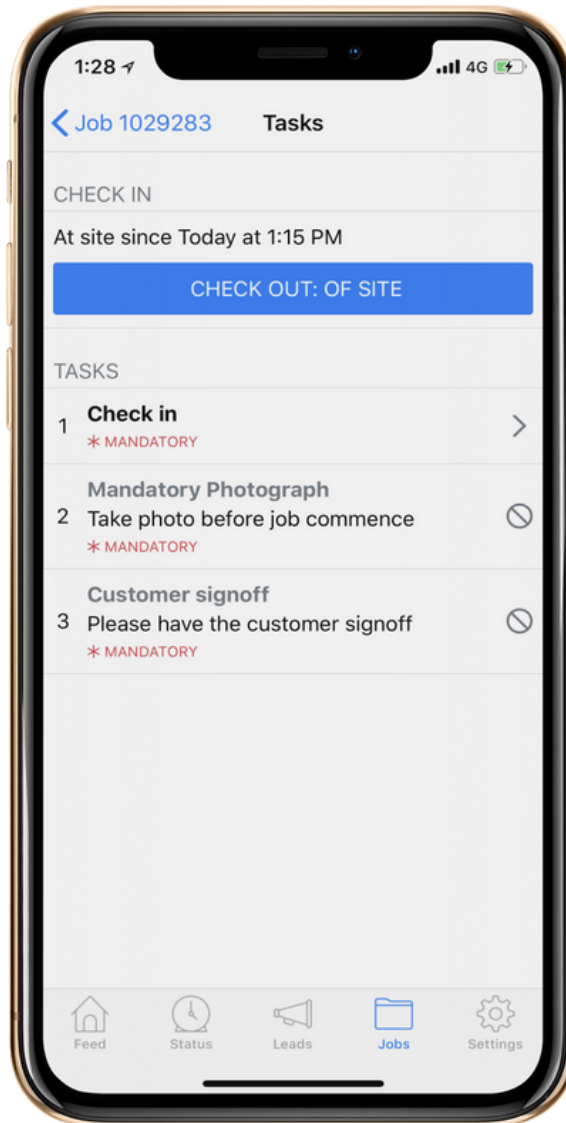
9. This is the view upon opening an accepted Job for further action. To commence, **tap the Start Job button**. To **check any messages relating the Job**, tap the **Communication button**.



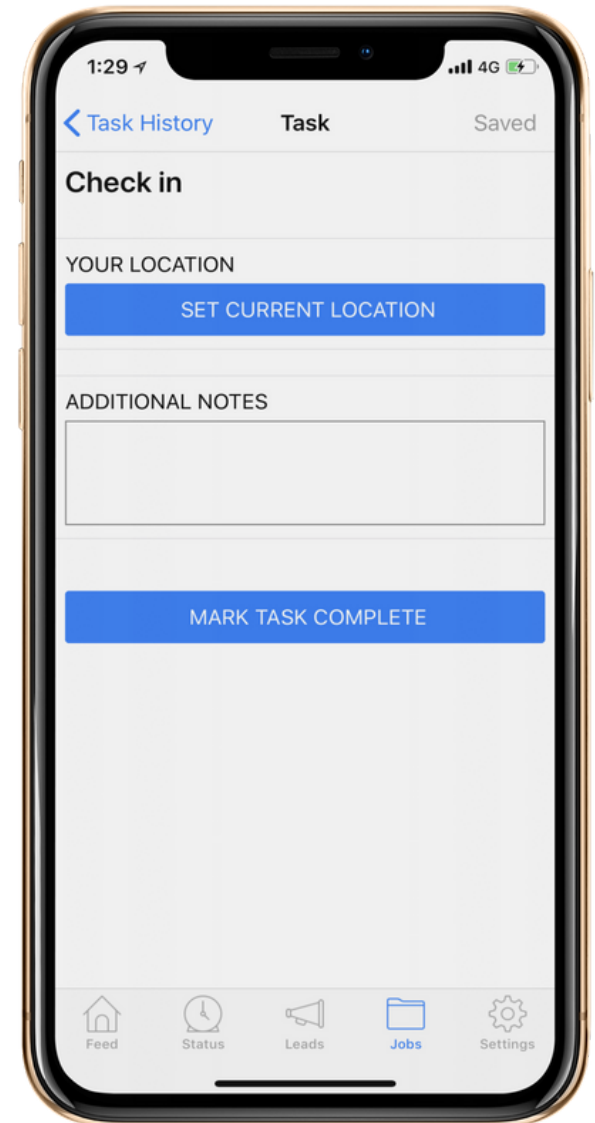
10. Next step: tap **In Transit To Site**. This effectively ensures the Field Worker can confirm they have started the job and that they are on their way to the Customer.



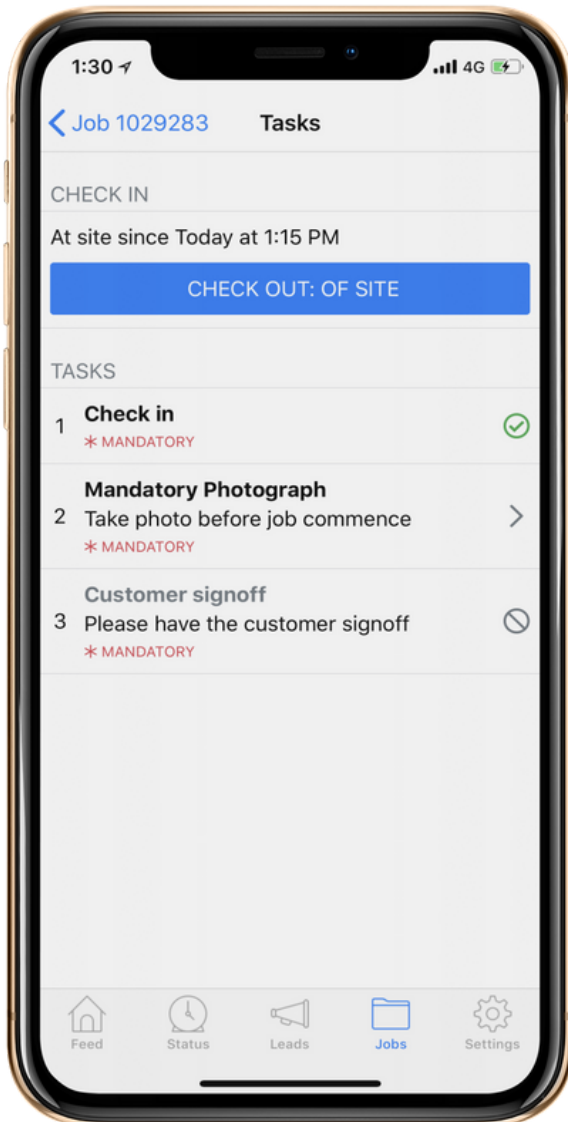
11. To confirm arrival at site, Field Worker needs to **tap the Arrived At Site button**.



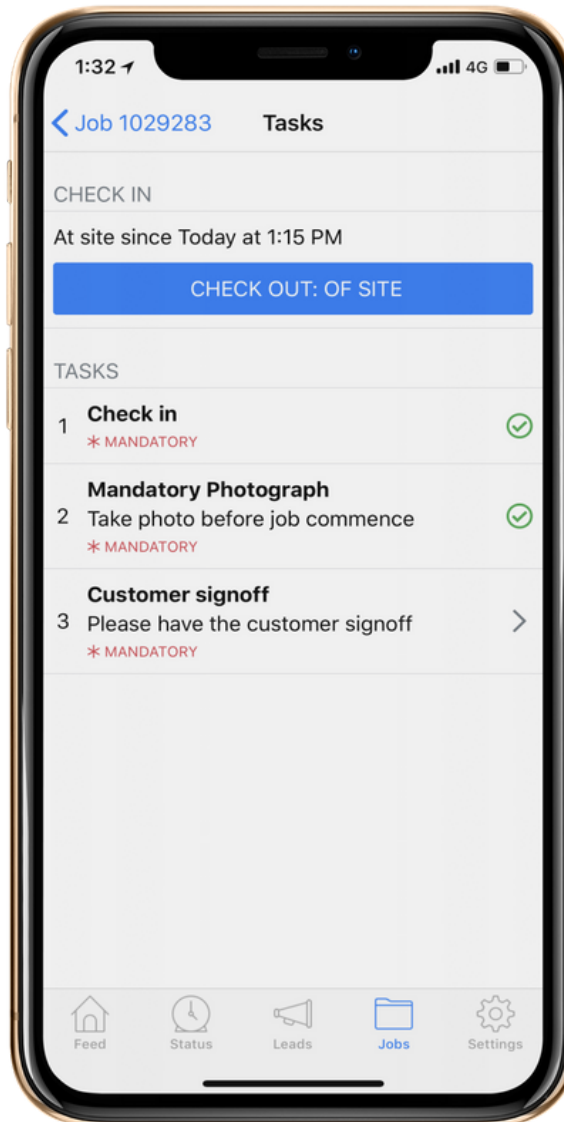
12. To **complete the Tasks of the Job**, the Field Worker should work their way through each Task item listed on the screen in order.



13. View of the screen containing the prompts for completion of Task 1 of the example supplied in the previous screenshot. **Tap Mark Task Complete to confirm completion of task and to move on to the next Task to be completed.**



14. A **green tick** will appear beside each Task item that has been marked as complete.

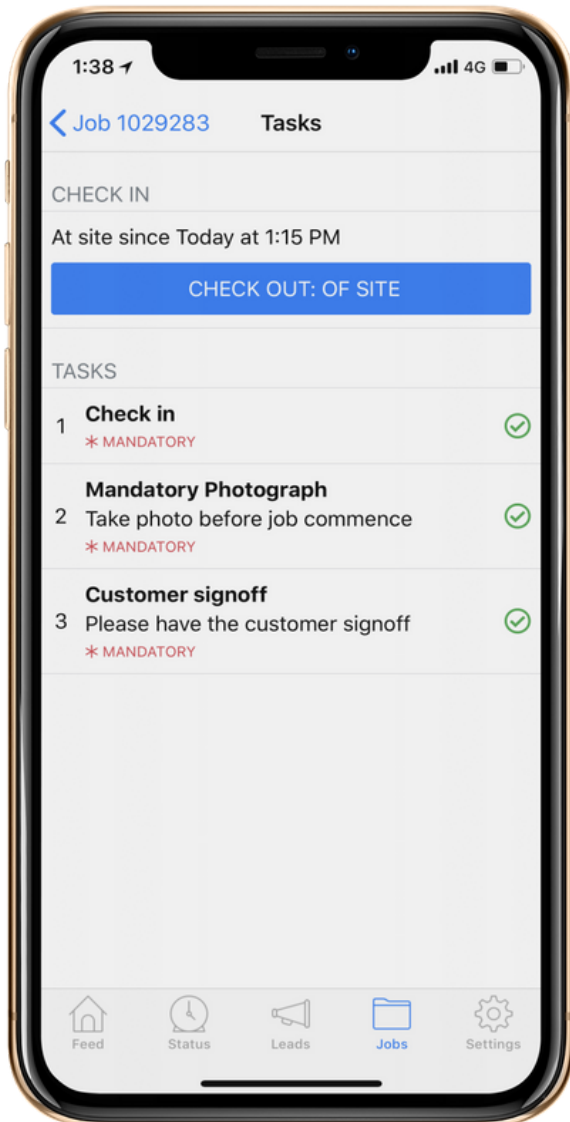


15. A **green tick** will appear beside each Task item that has been marked as complete.

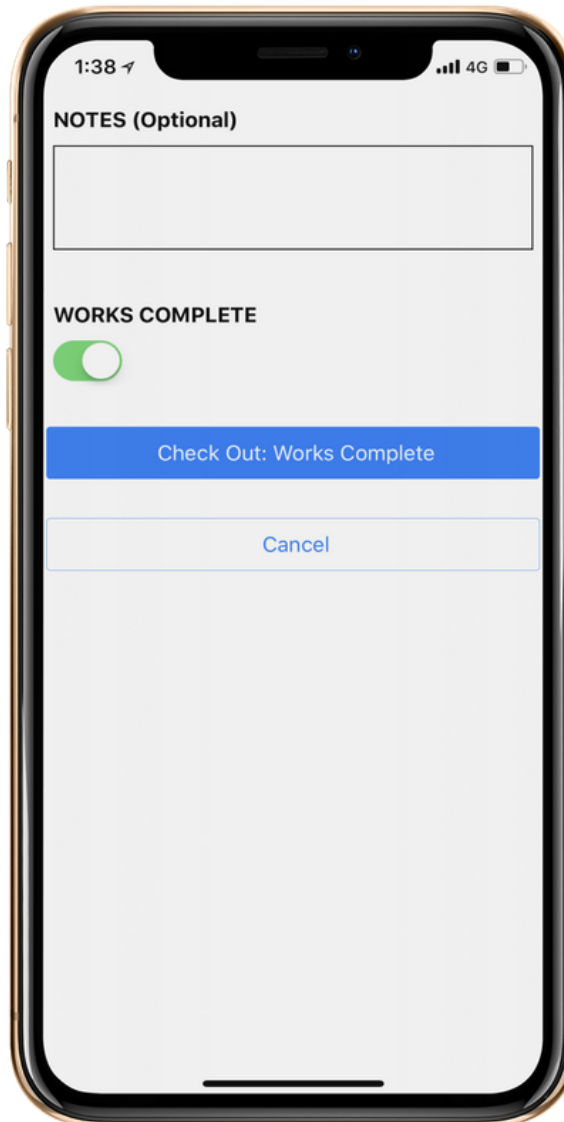


16. **Customer Signature**, often the final Task item of any one Job, can be easily captured within the App. Provision to make **Additional Notes** is also a key functionality.

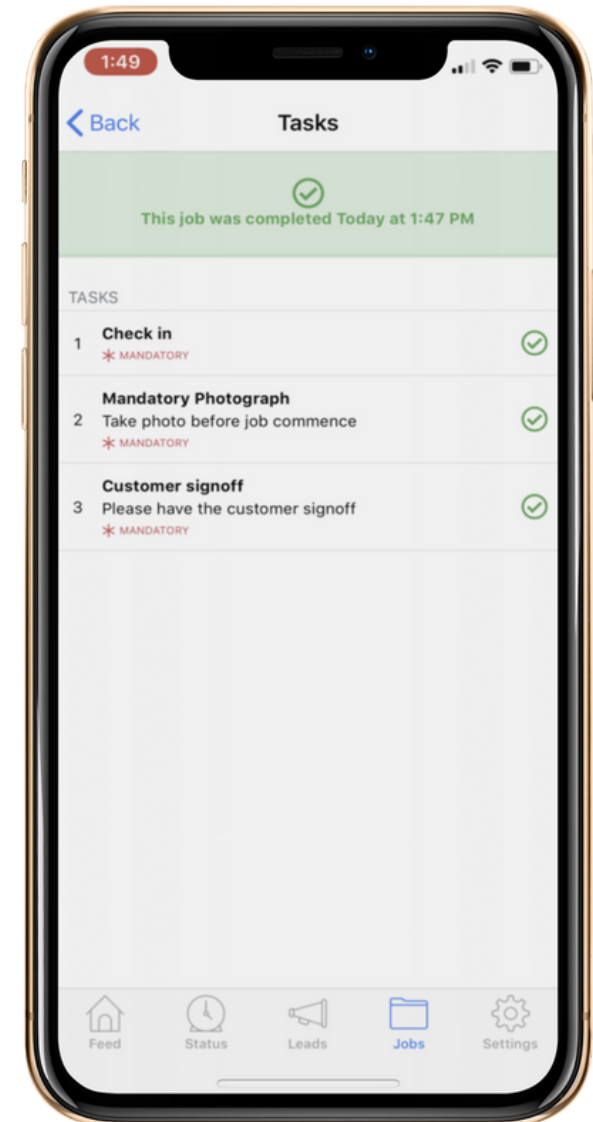
**Tap Mark Task Complete** to progress to next step.



17. A green tick will appear beside each Task item that has been marked as complete. Upon completion of all Task items, **next step is to tap on the Check Out: Of Site button to progress to closing the job.**



18. Upon tapping the Check Out: Of Site button, the Field Worker will be directed to Check Out in order to close the Job. Field Worker should use the **Works Complete** slider button to activate whether check out is on the basis of Works Complete or Works Incomplete. **Only after this check out element has been completed, should the Field Worker tap the blue Check Out: Works Complete** (or it may read, Check Out: Works Incomplete).



19. Upon tapping to Check Out of the Job, **confirmation that the Job has been completed will be display in a green coloured banner.**