

# ESC Mobile App Guide

## General Info and Installation Guide For Windows Phone 7



*Note: If you're just trying to demo the ESC Mobile app in our sample database, then all that is required is to download it from your device's app store. Once the app has been downloaded, just launch the ESC Mobile app and then tap on the **Open Sample** link on the main splash screen to enjoy.*

## What Features Are In ESC Mobile?

### Dispatch Information

Dispatch information, such as the customer name, address, phone numbers, complaint information, etc. are all available at your fingertips. You can even call a customer or email them using the hyperlinks in the app!

### GPS Tracking

If the tech's phone has GPS then ESC Mobile can send their location back to ESC. Using the Microsoft MapPoint integration (separate purchase required), you can view their location right on your Electronic Dispatch Board back in ESC!

### Create Invoices and Quotes

ESC Mobile allows you to create invoices and quotes in the field in a very simple to use interface. After you're finished creating the invoice or quote you can get the customer's signature and then email the invoice to them instantly!

### Take a Payment

With ESC Mobile you can take a cash, check or credit card payment. If you use the Intuit Merchant Services integration with ESC, you'll have the added benefit of authorizing and charging credit cards.

### View Documents from ESC

Do you use the attach documents feature in ESC? You should! You can attach all kinds of documents to your customers in ESC such as pictures, Word documents, PDFs, etc. and then view them in ESC Mobile.

### Get History, Equipment and Agreement Info

If you've serviced a customer's equipment or just did some general maintenance you'll be able to see that history in your ESC Mobile app. This is very useful for techs because it allows them to know exactly what work was performed previously and will help to offer the customer different suggestions on upgrades and more.

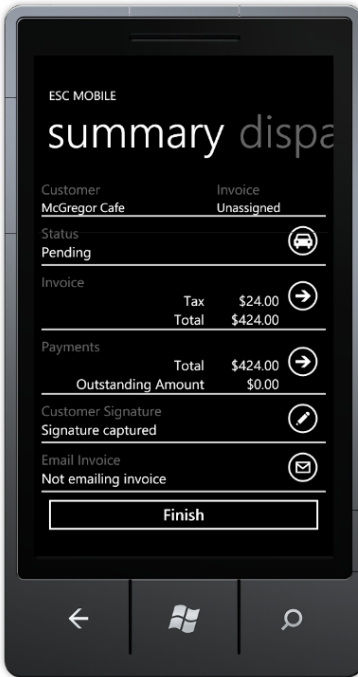
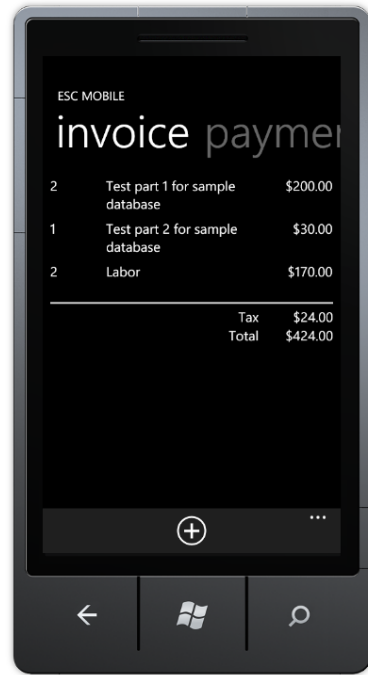
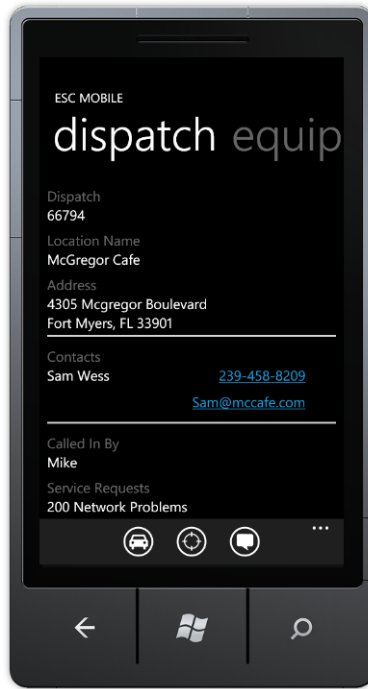
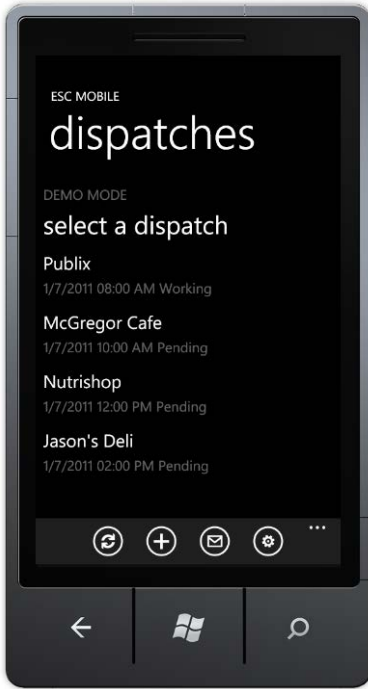
### Add New Equipment

If you need to add equipment while you're out in the field then ESC Mobile has you covered. Simply go to the Equipment area, enter the new equipment and the equipment will automatically be sent back to the customer in ESC when you "Finish" the dispatch.

### See Status Change Updates in Real-Time

When a tech changes their status in the field it's immediately updated in ESC. No more calling them to see what job they're on or if they've arrived on-site yet.

# Screenshots



## Prerequisites

- Sign up for the ESC Mobile monthly subscription plan. The app itself is free but a subscription fee is required in order to use it with your database. If you have not already signed up for the subscription plan, please contact your sales person for the pricing and details.
- You need to be on the latest version of ESC and Connections Server. Go to <http://descosupport.com/Default.aspx?ReturnUrl=/> to download the latest version.
- If you just purchased ESC Mobile you should have been given a new license key to put into ESC. To do this simply go to **Help | About | License** in ESC and enter your new license key. It's recommended that you copy\paste the license key to ensure accuracy.

## Installing the Connections Server

These directions will walk you through how to install or upgrade the ESC Connections Server to the latest version. If you already have the latest Connections Server installed, please skip to Configuring the Connections Server section.

### Before You Begin

If you are upgrading from a previous version, make sure you upgrade ESC to the latest available version before performing this procedure.

### Download the ESC Connections Server

Go to the computer where your ESC database is installed. This will usually be your server.

1. Log into the [dESCO Support Portal](#).
2. Select the latest version.
3. Click the **Download** button for the ESC Connections Server and save it to your desktop.

### Uninstall Previous Version

If you are upgrading from a previous version of the Connections Server you will need to uninstall the existing version first. If you are installing this for the first time, skip to the next section.

1. In Windows, click **Start | Control Panel**.
2. Select **Add or Remove Programs** for Windows XP or **Programs and Features** for Windows Vista/7 from the resulting list.
3. Highlight **ESC Connections Server** from the list of available programs and click **Remove**.
4. Follow all the prompts to uninstall the software.

### Install the ESC Connections Server

1. Find the **ESC Connections Server Setup.exe** file you downloaded and double click it.
2. Accept all the defaults as you go through the installation wizard.
3. After the installation is finished, simply click the **Close** button.

## Configuring the Connections Server

Once the Connections Server is installed you will need to configure it for ESC Mobile. Complete the following steps to do this.

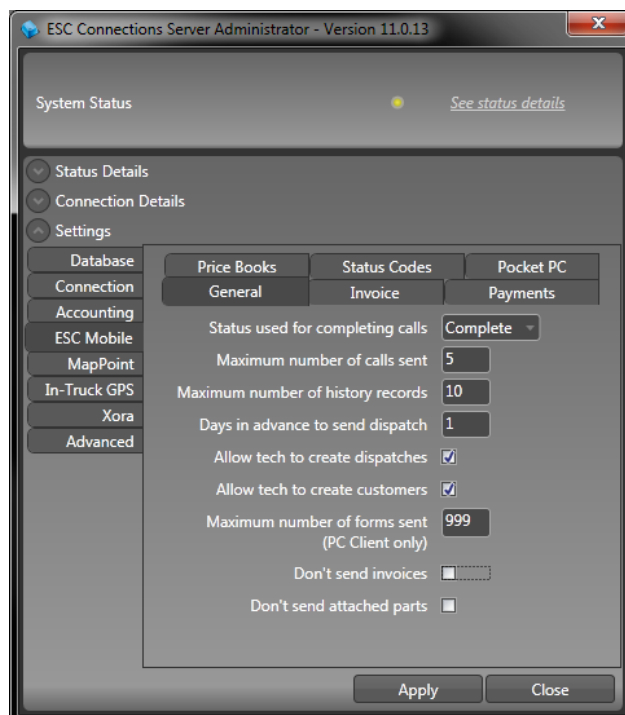
*NOTE: If you are currently licensed and using the ESC Mobile client software, ESC Mobile Web or ESC Web Front Office modules, your Connection Server should already be configured for this use and you can skip this step.*

### Launching the Connections Server

1. Go to Start | All Programs | dESCO | ESC Connections Server.
2. Double click the blinking blue ESC icon in your Windows System Tray (usually near the time in the lower right hand corner of the screen). This should cause the ESC Connections Server Administrator window to appear.

### Connecting to the Database

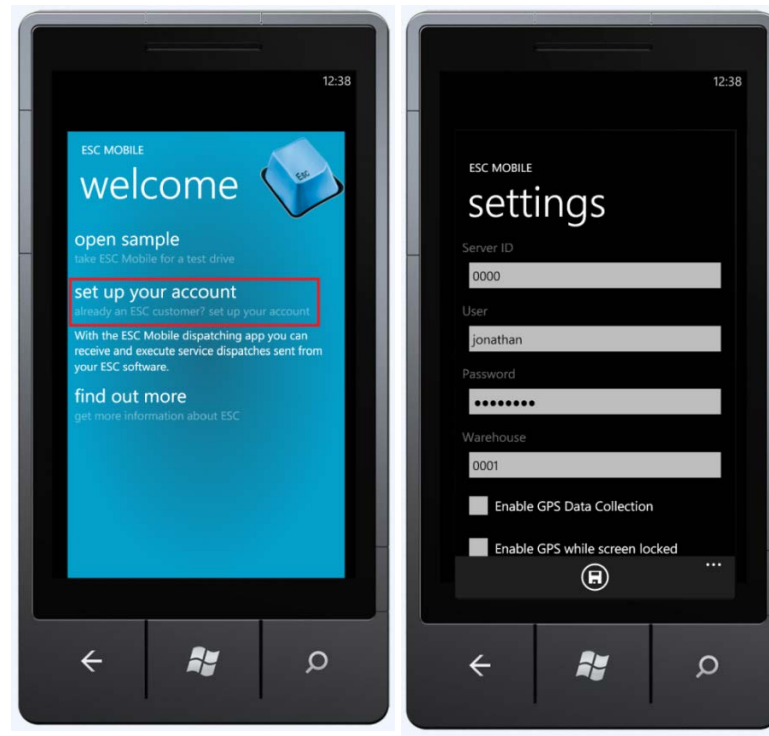
1. Enter the information needed to connect to your ESC database in the fields provided. You can get this information from within ESC by going to **Help | About**.
2. Click **Apply** when you're done entering the connection info. This will cause the Connections Server to reset which may take a moment.
3. Click the **ESC Mobile** option on the left to setup the preferences for the techs. The only areas that you need to configure are General, Status Codes and Payments.
4. Click **Apply** again when you're finished. When the Connections Server is finished resetting click **Close**



## How to Setup the New ESC Mobile App with Windows Phone 7

### For Current ESC Mobile Client Users

If you have already purchased the Mobile Web module from dESCO, just open the ESC Mobile app on the phone and then touch the **Set up your account** link shown below. Enter your Server ID (without the preceding zeros), User Name and Password for a valid tech:



### For New ESC Mobile Purchasers

If you just purchased the ESC Mobile module for use with your ESC, you must do the following things to make it work:

- We will provide you with your unique Server ID to enter into the application.
- You must enter all ESC Mobile techs into ESC under **Dispatch | Enter Technicians**.
- You must also enter all ESC Mobile techs in as users and associate their tech number to the login. This is done **in Company | Setup Users**. Create the user with a password and in the Associate to Tech field, assign the user their proper tech number from the Enter Technician's screen.
- In Setup Users, you must assign the tech the **mobile user** permission to be able to log in.

Enter the ESC User Name and password then press Next.

User Name: LARRY  
Password: ●●●●  
Verify Password: ●●●●  
Associate to Tech: Larry 0002


After selecting a user, click Next to continue.

Mobile  
 Mobile  
 Login as a Web Front Office user  
 Login as a mobile user  
 Login as a Web Mobile user


- After you've setup the users you can configure the ESC Mobile app by following the instructions in the **For Current ESC Mobile Client Users** section above.

## How to Use the New ESC Mobile App with Windows Phone 7


### Basic Usage

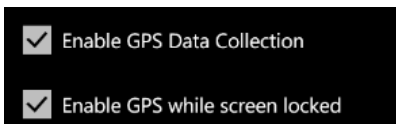
**Buttons** – If you're unsure what a button means you can tap the  button and it will expand the button toolbar and display the button description


**Getting from screen to screen** – Once you select a dispatch, swiping your finger in either direction will cause you to go to the next screen. For example, if you're on the equipment screen and swipe from right to left you will go to the history screen.

**Synching dispatches from ESC**– Getting dispatches onto your device is very easy. Simply go to the **Dispatches** screen and then tap the  button.

**Completing a dispatch** – There are two requirements in order to complete a dispatch and send it back to ESC. The first requirement is that the dispatch is in a "Complete" status. Doing this will automatically take you to the **Summary** screen where you can see the invoice amount, payments taken and choose to email the invoice. The second requirement is tapping the **Finish** button on the **Summary** screen. The **Finish** button is what actually sends the dispatch back to ESC, emails the invoice and charges the credit card (if the Merchant Services integration is enabled).


**Turning on GPS tracking** – GPS tracking allows ESC Mobile to send the mobile user's coordinates back to ESC so they can show up on the Electronic Dispatch Board. This feature requires Microsoft MapPoint to be installed and licensed back in ESC. To turn on GPS tracking simply navigate to the **Dispatches** screen, tap the **Settings**  button and then select **Enable GPS Data Collection**. This will send GPS data when the phone is unlocked. You can also select the **Enable GPS while screen is locked** option if you want to send the GPS data even when the phone is locked. Enabling this option may deplete your battery faster.



**Getting directions** – ESC Mobile integrates directly with Microsoft's Bing Maps. To use this feature simply click the  icon on the **Dispatch** screen and then use Bing Maps to get the directions.

**Attaching pictures and viewing documents from ESC** – ESC Mobile has the ability to attach pictures and view documents such as Word docs, PDFs and pictures from ESC. Simply navigate to the **Documents** screen to get started. If you want to view a document simply select it and it will download and open it. If

you want to attach a new picture then you can tap the  icon on the bottom. From there you can take a new picture with your camera or select an existing one.

**Create a quote** – To create a quote in Windows Phone 7 simply tap the  button when you're on the main dispatch list screen then tap **add quote**.

## Frequently Asked Questions

Q: How do I download and install the ESC Mobile app?

A: Tap the Marketplace icon on the home screen then search for ESC Mobile and download it. The app will automatically install itself.

Q: How can I print a mobile invoice?

A: At this time, ESC Mobile can only email invoices natively. You can, however, use printers like the HP Photosmart D110 with ePrint to email the PDF invoice directly to the printer. These printers require Wi-Fi connectivity to work. For more information on this type of setup, please contact HP.

Q: Can I scan barcodes with ESC Mobile?

A: Not at this time however we are looking into that for a future update.

Q: Why do I get a licensing error after entering my server ID into the Settings area?

A: Make sure that you leave out the preceding zeros. If you're server ID is "0000020" then just enter "20" for the server ID.

Q: Where can I find the "Hours on job" field that the old mobile clients used to have?

A: This field is currently not available in the new ESC Mobile apps but may be added later.

Q: Why can't I email an invoice for multi-day\multi-tech dispatches?

A: The invoice information is fragmented between ESC and ESC Mobile when multiple techs\days are used. Invoices for multi-day\multi-tech dispatches must be printed or emailed from ESC.

Q: Why can't my techs create dispatches or customers in ESC Mobile?

A: You need to enable these options in the Connections Server. Bring up the **Connections Server Administrator** program on your server, click **ESC Mobile** on the left and then enable the options highlighted below. After you're finished click **Apply** and then **Close**.

Q: Where do I find quotes that were created in ESC Mobile?

A: When a quote is saved in mobile it is automatically added in ESC, you **don't** need to import it like you do an invoice.

Q: Why does the invoice number say "Unassigned" on the Summary screen?

A: The invoice number will automatically be assigned when you tap "Finish" on the Summary screen.

For more information please click the link below. You will need your Support Portal login and password.

[http://www.descosupport.com/kbase/users/kb.php?id=10736&category\\_id=0](http://www.descosupport.com/kbase/users/kb.php?id=10736&category_id=0)