

ESC Mobile App Guide

General Info and Installation Guide For iPhone and iPad



*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.

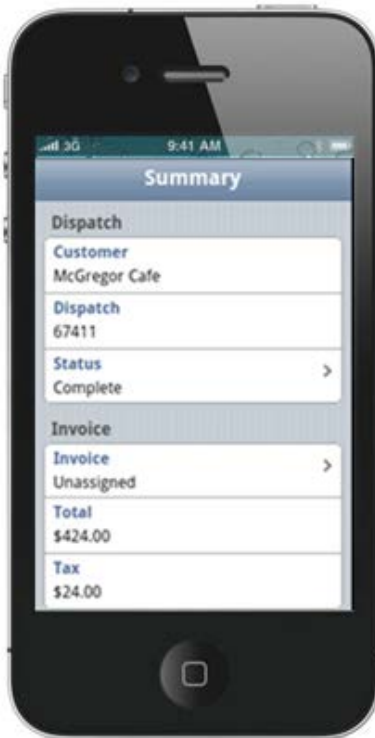
Add New Equipment

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.

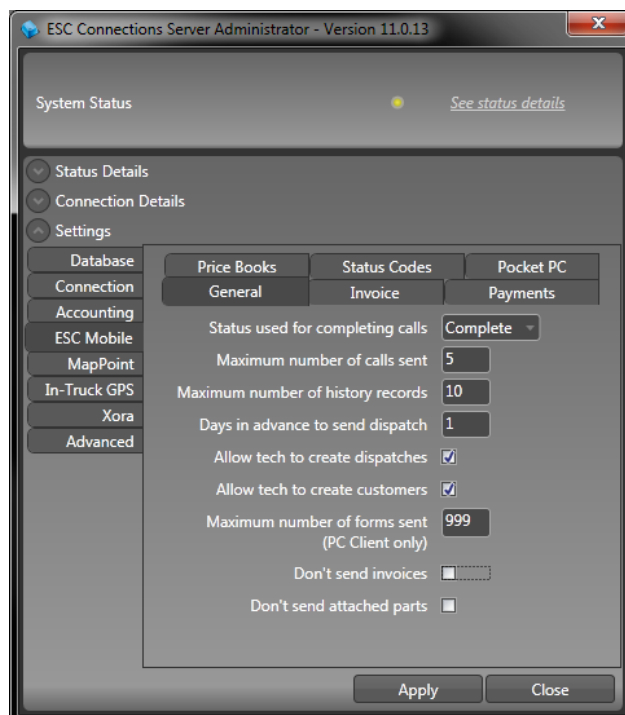
NOTE: If you are currently licensed and using the ESC Mobile client software, ESC Mobile Web or ESC Web Front Office modules, your Connection Server should already be configured for this use and you can skip this step.

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 an iPhone or iPad

To read about the capabilities of the ESC Mobile app for iPhones, check out our newsletter for all the details at: <http://desco-soft.com/newsletters/2010octoberarticle2.html>

For Current Mobile Web Users

If you have already purchased the Mobile Web module from dESCO, then to configure it for your company, close the ESC Mobile app on the phone and then find your **Settings** icon and open it. Scroll down towards the bottom of the list and locate the **ESC Mobile** icon. Open ESC Mobile to change the 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 **Web Mobile user** permission to be able to log in.


The image shows two screenshots from a web-based user setup interface. The first is a form titled 'Enter the ESC User Name and password then press Next.' with fields for 'User Name' (LARRY), 'Password', 'Verify Password', and 'Associate to Tech' (Larry 0002). The second is a permissions tree where 'Login as a Web Mobile user' is checked under the 'Mobile' category.

- 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 an iPhone or iPad

Basic Usage

Getting from screen to screen – Navigation from screen to screen is done using standard buttons and links on the screen.

Syncing dispatches from ESC– Getting dispatches onto your device is very easy. Simply go to the **Dispatches** screen and then tap the  button on the upper right hand corner.

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 tap the **Home** button on your device, find your **Settings** icon, scroll down to **ESC Mobile** and then turn on the **Acquire Location** option. When you re-launch ESC Mobile, you’ll notice a purple arrow on the upper right-hand corner. This means that GPS data is being sent back to ESC.

Note: Turning on GPS tracking on the iPhone or iPad will force your device to stay unlocked. Apple does not allow us to collect or send GPS data while the phone is locked. You can manually lock the device by hitting the lock button on the top but GPS will not go back to ESC.

Getting directions – ESC Mobile integrates directly with Apple’s Maps app. To use this feature simply tap the customer’s address, this will load Maps. Once Maps is up you can tap the red pushpin and then select **Directions To Here** 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 **Dispatch** screen, scroll down to the bottom and select **View Attached Documents**. If you want to see a document just tap on the one you want to see. If you want to attach a new picture you can tap **Attach New Picture** then tap the  icon and you’ll get the option to take a picture with your camera or attach a picture that is already on the device.

Note: With the iPad, you can only attach pictures that are already on the device because it doesn’t have a camera.

Create a quote – To create a quote on an iPhone or iPad simply tap the **Add Quote** option when you’re on the main dispatch list screen.

Frequently Asked Questions

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

A: Tap the App Store 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 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