



USER MANUAL

VORTEX FSM MOBILE ANDROID



GENERAL INFORMATION ON THE VORTEX FSM ANDROID MOBILE APPLICATION

This user manual will provide you with everything you need to know about **VORTEX Mobile Application**.

Every day, technicians receive their assigned tasks on their mobile app, while anything that is considered important (location to visit, appointment time, distance, spare-parts, comments etc.) is also appeared in the app. The information resulted from technicians' actions are sent to the Vortex Back-office application.

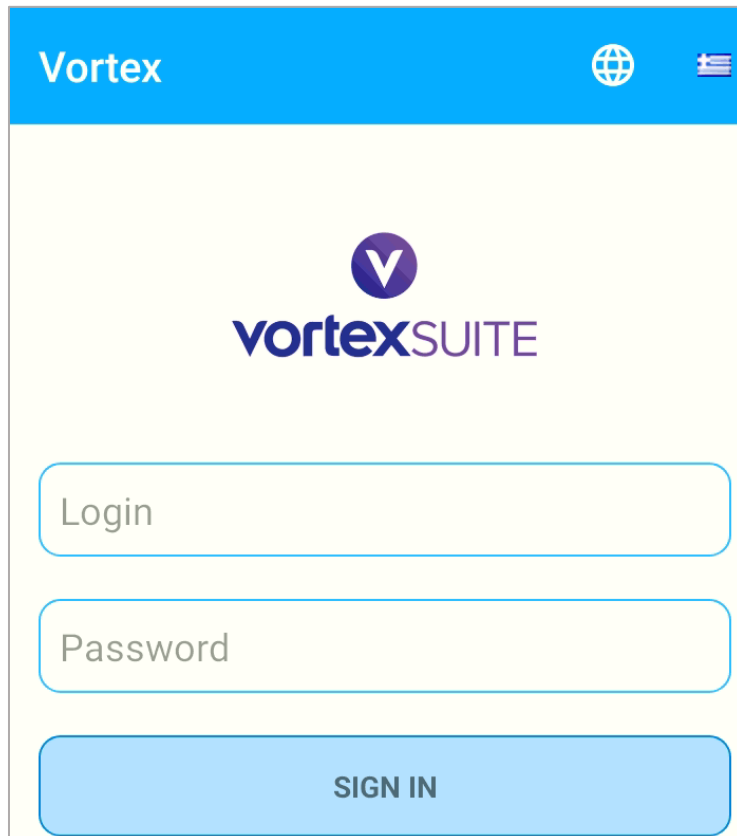
Minimum hardware requirements (for mobiles/tablets)

- Operating system: Android 10
- 2GB of RAM
- 64GB Disk (without a large number of photos)
- Screen size: 5"
- Google Services

HOW TO ACCESS THE APPLICATION

To access the application, users must enter their credentials (username and password), which will be provided to them by the system administrator.

Please note that the available options are adapted to the authorization level of each user.

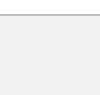
The image shows a mobile application login screen. At the top is a blue header bar with the word "Vortex" in white on the left, a globe icon in the center, and a hamburger menu icon on the right. Below the header is a large yellow rectangular area. In the center of this area is the "vortexSUITE" logo, which consists of a purple circle with a white 'V' inside, followed by the text "vortexSUITE" in a purple sans-serif font. Below the logo are two white input fields with rounded corners and blue borders. The first field is labeled "Login" and the second is labeled "Password". At the bottom of the yellow area is a solid blue button with rounded corners and the text "SIGN IN" in white capital letters.

VORTEX FSM MOBILE MAIN SCREEN

SIDEBAR OPTIONS

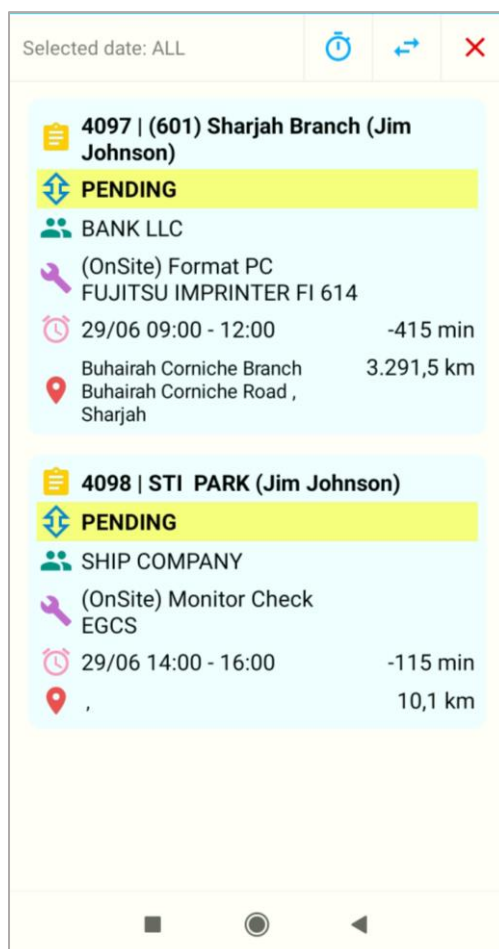
The left side of the application contains several important functions:

	 English
	 Greek
	 Arabic
	Manuals
	Show Map
	Company Custom Fields
	New Assignment
	Show Assignments
	New Customer
	Search Customers
	Synchronize
	Send Email
	Photo Settings
	Host Server Settings
	Clear Cache

Button	Function
 English  Greek	Set the default language of your application (Greek-English).
	Press this button to view the technical instruction manuals, which the technician can also access from his device.
	Press this button to view your scheduled appointments on the map.
	Press this button to view the company's custom fields, which may be edited.
	Press this button to create a new workorder from your device.
	Press this button to view all scheduled tasks.
	Press this button to create a new customer. Once the new customer is entered and the data is synced, the back-office application will be automatically updated.
	By typing the customer's name, the application searches and displays any names that match your search. You can begin to type their name or surname, or part of these. When searching, you may use either upper-case or lower-case letters.
	Press this button to synchronize the app's data.
	Press this button to send emails directly from within the app. To do so, you must have a Google email account.
	Press this button to define the size of photos and how to send them. The larger the photo, the higher the resolution. ATTENTION: The larger the photo, the more data is needed to send it. ➤ Wi-Fi or mobile data connection ➤ Wi-Fi connection only

	Press this button to display the application's URL address.
	Press this button to delete your cache, which frees up space on your phone. This helps clear storage space and may even resolve problems. If you notice that the application shuts down randomly or delays, try clearing the cache first.
	Press this button to export your saved settings and data.
	This button redirects users to the application's website https://www.vortexsuite.com/el/ .
	Press this button to exit the app.

Below you will find an example of a standard home screen. All of the user's scheduled appointments are displayed on the main screen.



Users may scroll up or down to view their scheduled workorders.



The duration of any displayed future assignments will be defined by the Back-office application. This is a special parameter.

BASIC WORKORDER INFORMATION



The serial number of the workorder. Also displays the customer site and the technician in charge of the workorder



Workorder status



Customer company name



Type of workorder and service to be performed

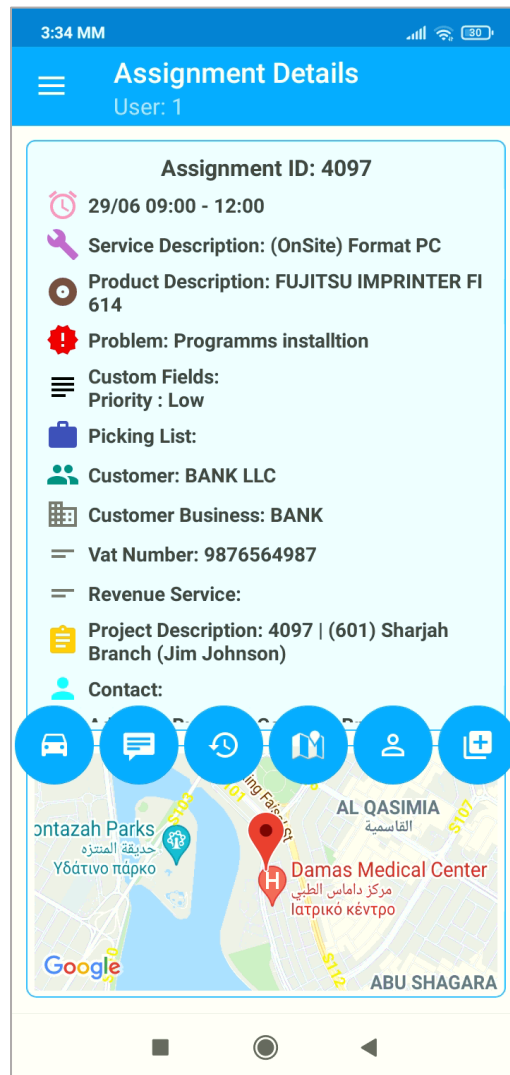


Scheduled date and scheduled start and end time of the workorder



Customer address

Click on any workorder to display its details.



This includes all the necessary information about a task. The technician receives the customer's contact information, so he can communicate directly with him, as well as instructions (via Google maps) to reach the location.

The following actions are available to users so they can properly manage a task:



Start Travel. By **clicking on** this option the technician indicates the time at which he departs for the site of the damage. Clicking on 'Start Travel' also enables users to **automatically** send an Email or SMS to the customer. This can be defined in the settings of the Back-office application.



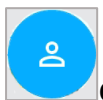
Workorder actions. By clicking on this option, the technician can begin to process and complete a workorder. Other available options include check in/out, mandatory checklist, internal comments, etc.



Workorder history. This option displays past workorders associated with a specific job. Users may configure the settings to display site or product workorders.



Displays appointments on the map so that the technicians may use GPS navigation.



Change technician and date.

Allows the technician to reallocate a task to a different technician or to another date and time. This option is granted to authorized users only.

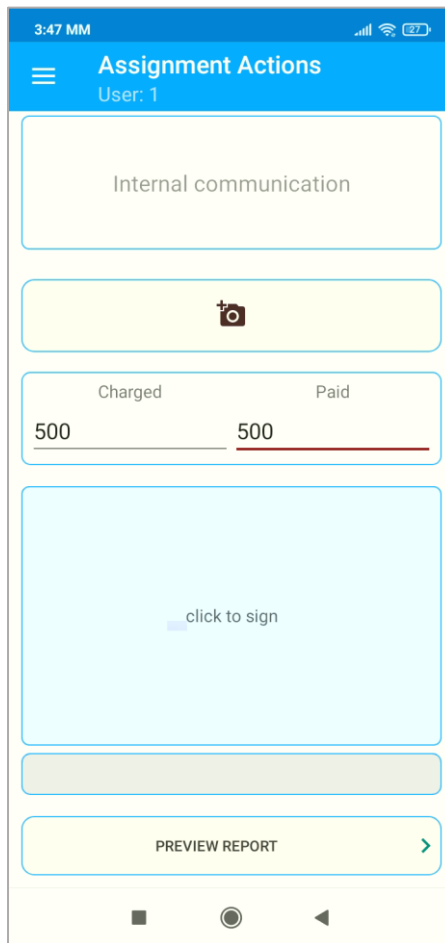


Display sub-workorders. When a task requires the participation of more than one technicians, each technician will have his own workorder. So this option displays the workorders of the other technicians taking part in the job.

MANAGING A WORKORDER FROM THE MOBILE APPLICATION

Which steps must be completed when carrying out a workorder?

1. We click on .
2. We enter the check-in time.
3. We fill in all the necessary information. We outline our actions and any mandatory checklist steps. When a workorder contains extra steps, the technician can NOT finalize/close the Service Report if these extra tasks have not been successfully completed/ performed.
4. We may enter any zone measurements here.
5. We can attach a photo that has been taken with our mobile.
6. The **Internal Comments** field displays any important information that the technician may want to add regarding his visit. This information is NOT seen by the customer and is not mentioned on the Service Report when it is sent to the customer. NOTE: Press and hold the **Internal Comments** option to keep it temporarily hidden from the workorder. Press and hold again to restore it.
7. **Billing/Collection**: These two fields are completed when the technician wants to bill the work performed or enter the amount collected from a customer. In this case, the technician must complete the amount/value collected.



3:47 MM

Assignment Actions

User: 1

Internal communication



Charged Paid

500 500

click to sign

PREVIEW REPORT >

8. In the end, the Report is signed by the both the Technician and the Customer using a **digital signature**. (In the settings, the customer's signature may be made mandatory or optional in order to finalise the workorder).
9. We then need to change the Report Status.
10. We press **Check out** to indicate the completion of the job at the site.
11. We click on **Preview report** to see what our report will look like prior to saving it and sending the PDF file to the customer.



NOTE: Once the technician clicks on **Check Out** he may not modify or add anything to his workorder (unless there is a different setting in the Back-office application).

Different actions that can be taken by a Technician when managing a workorder

1. In a workorder, the Technician has access to all the products of a site. It is possible to display all product attributes and not just the attribute we have defined as the product ID. This option may be activated in the Back-office application.
2. The Technician can add new products to a site, with attributes and measurements. In the Back-office application, there is a setting with which we can define whether we want a specific attribute to always be the Product ID.
3. The Technician can select the spare parts used during the visit.
 - **Assessment:** The number/quantity of spare parts that will be needed to repair the damage.
 - **Use:** The number/quantity of consumables used during the job.
 - **Notes:** Any useful information added by the Technician.
4. The Technician can add a second service (task) to the workorder, if a second task was indeed performed at the site, in addition to the scheduled one.
 - **Assessment:** This option is selected if an assessment has been carried out for the

NOTE: The user can NOT create new customer sites.

second service.

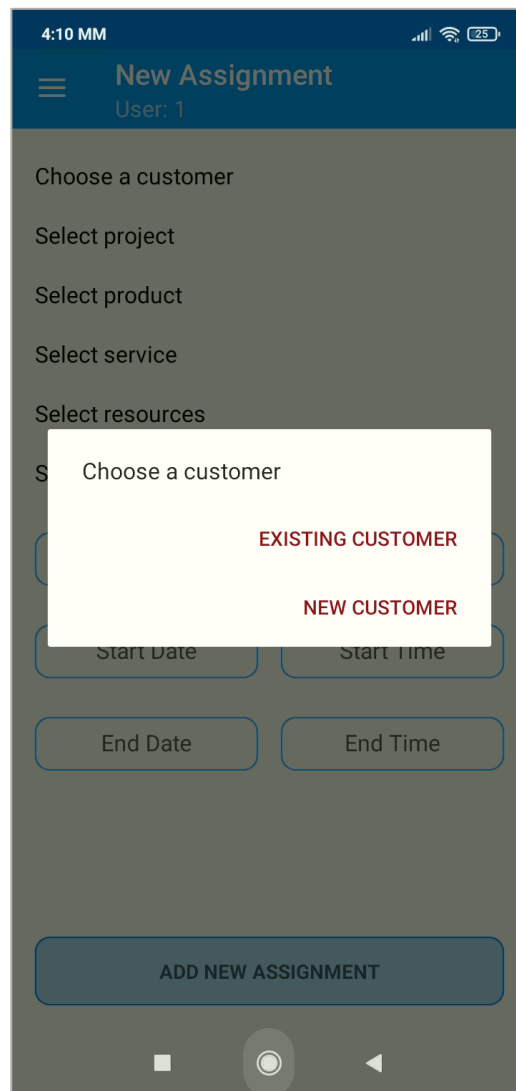
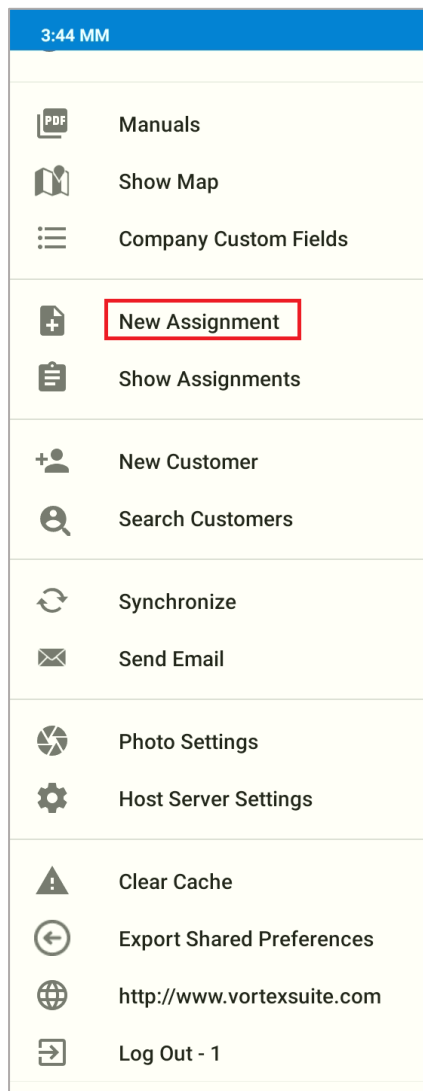
- **Done:** This option is selected once the second service has also been carried out.

CREATING A WORKORDER FROM THE MOBILE APPLICATION

Technicians may create a new workorder from their mobile app. When creating a workorder, Technicians have access to the products of a site and their attributes.

The **steps** to be taken are shown in detail below.

Click on  at the top left to display the main menu of the app. Select **New Workorder**.



3:59 MM

Search Customers
User: 1

Name:

Phone:

Address:

Project Description:

SEARCH CUSTOMERS

3:43 MM

New Assignment
User: 1

Customer: PALM JUMEIRAH (id: 27)
Project: GOLDEN MILE (id: 3968)
Product: CHAIR (id: 7952)
Service: 000278 - Disinfestation (id: 58)

Select resources

Assignment Type: OnSite

Problem

Start Date	Start Time
29-Jun-2021	15:00
End Date	End Time
29-Jun-2021	16:00

ADD NEW ASSIGNMENT

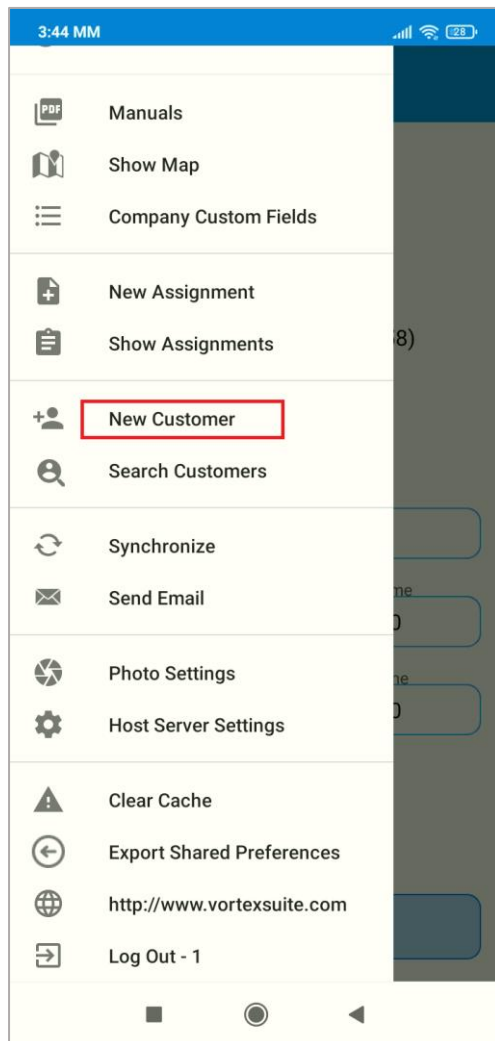
The Back-office application shows the origin of the workorder (that it has been created through the mobile app).

Press the sync button  to refresh the list of workorders, which will also include the new workorder.

CREATING A NEW CUSTOMER FROM THE MOBILE APPLICATION

Users may create a new customer from their mobile app. To do so, they will need to fill in the form (the only mandatory field being the customer's company name). By adding the new customer, his first site is automatically created.

ATTENTION: Users may not add products to a Site.

A screenshot of the 'New Customer' form in the mobile application. The form has a blue header bar with the title 'New Customer' and 'User: 1'. The form contains several input fields: Business Title, Business, Mobile, Phone, Email, Zip, City, Address, and Contact. Each field is represented by a light blue rounded rectangle with a blue border. The background of the app is dark grey.

By pressing the data sync button  the customer list is updated, including the new customer that has just been created.



If your mobile device has an active data connection, the settings and actions will be synchronized with your account. In the absence of a connection, the data will be synchronized when a connection becomes available.

Pressing the data sync button will also send any new information to the Back-office application.

