5.0 User Guide

Mobile QuickApp

www.goTeamWORKS.com

Email: support@goTeamWORKS.com

Toll Free Phone: 866-892-0034

Copyright© 2012-2013 by TeamWORKS Solutions, Inc.
All Rights Reserved

Table of Contents

Desktop/Laptop User Instructions 3
Mobile Device User Instructions 6
Transactions 14
Entering Labor Transactions 14
Entering Inventory Transactions 15
Entering New Purchase Transactions 16
Inventory Locator 18

Copyright© 2012 -2013 by TeamWORKS Solutions, Inc. All Rights Reserved

Mobile QuickApp 5.0 User Guide

The TeamWORKS QuickApp is an extension of our Client based Application and WEB Work Orders. It is an easy to use mobile application that requires no installation and can be utilized with virtually any mobile device including smart phones, tablet pc's and iPad's®. In addition, there is an emulator application built into the QuickApp that enables users the ability to utilize the application from a Desktop/laptop web browser.

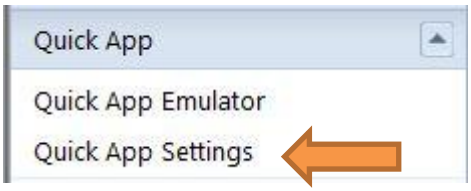
Using a standard browser, simply login to the Mobile QuickApp web page and field users can manage and complete their existing Work Orders instantly.

Copyright© 2012 -2013 by TeamWORKS Solutions, Inc. All Rights Reserved

Desktop/Laptop User Instructions

1. Login to TeamWORKS

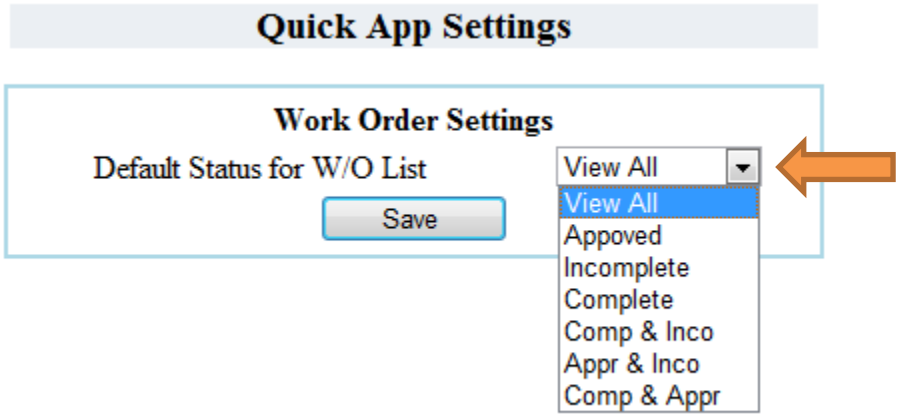
2. From the main menu, Click on Quick App and Select Quick App Settings



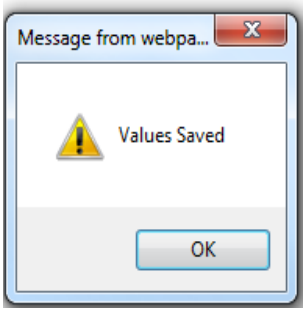
Copyright© 2012 -2013 by TeamWORKS Solutions, Inc. All Rights Reserved

3. Your first login will ask you to setup your Default status for the Work Order list. Setting up your default status will set up your login for use in TeamWORKS and will customize your work order list when you login. ***Note: See your TeamWORKS Administrator for detailed instructions.***

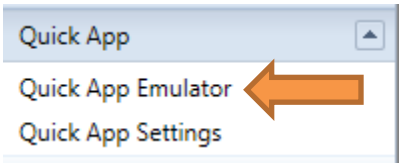
   After your selection Click Save to continue.



4. You will receive a confirmation message that your Values were Saved. Click OK.



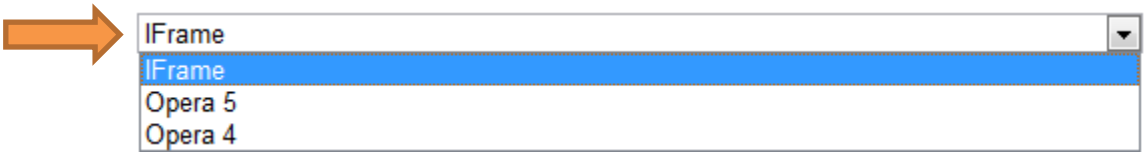
5. Go back to the main menu, Click on Quick App and Select Quick App Emulator



Copyright© 2012 -2013 by TeamWORKS Solutions, Inc. All Rights Reserved

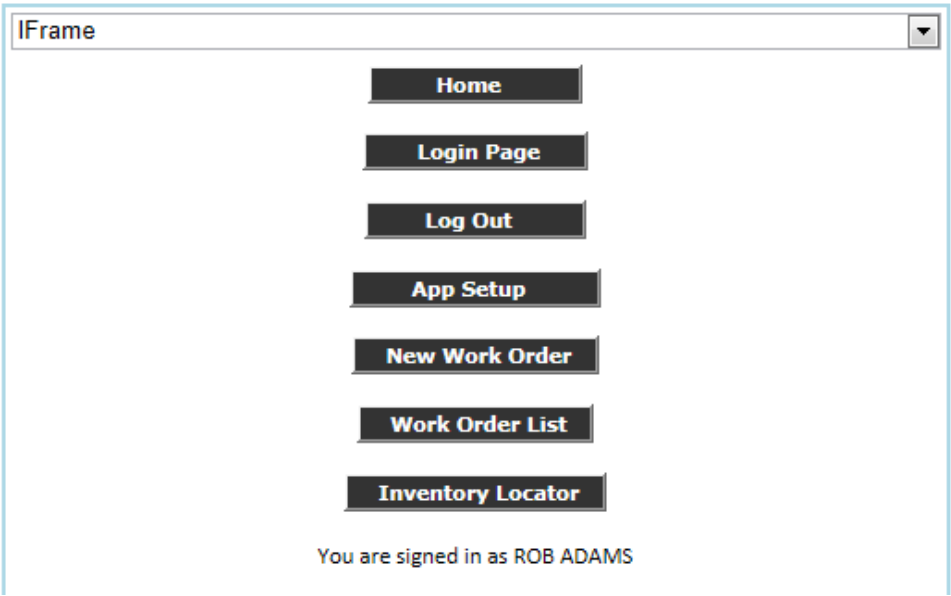
6. Selecting the QuickApp Emulator will yield the Quick App System Home Page screen.

*NOTE: some screen shots may vary depending upon the browser you use. Changing the dropdown at the top of the page will change the emulator appearance. ***TeamWORKS stongly recommends keeping the emulator setting to IFrame*



7. Click

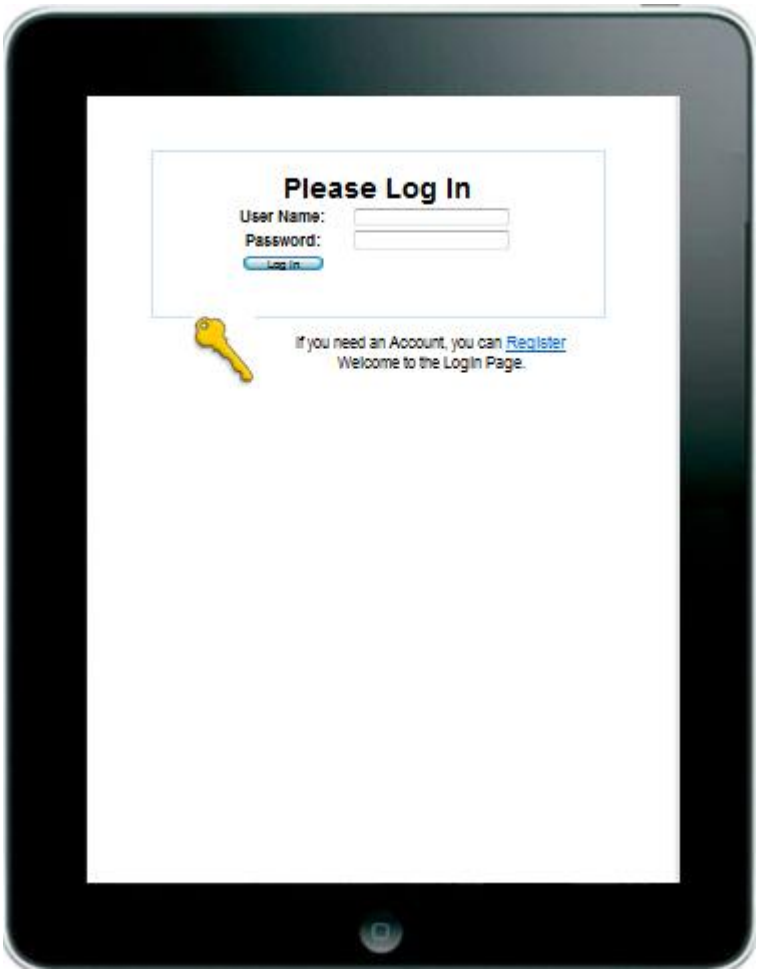
to open the main menu screen. The QuickApp application is now ready for desktop/laptop use.



Copyright© 2012 -2013 by TeamWORKS Solutions, Inc. All Rights Reserved

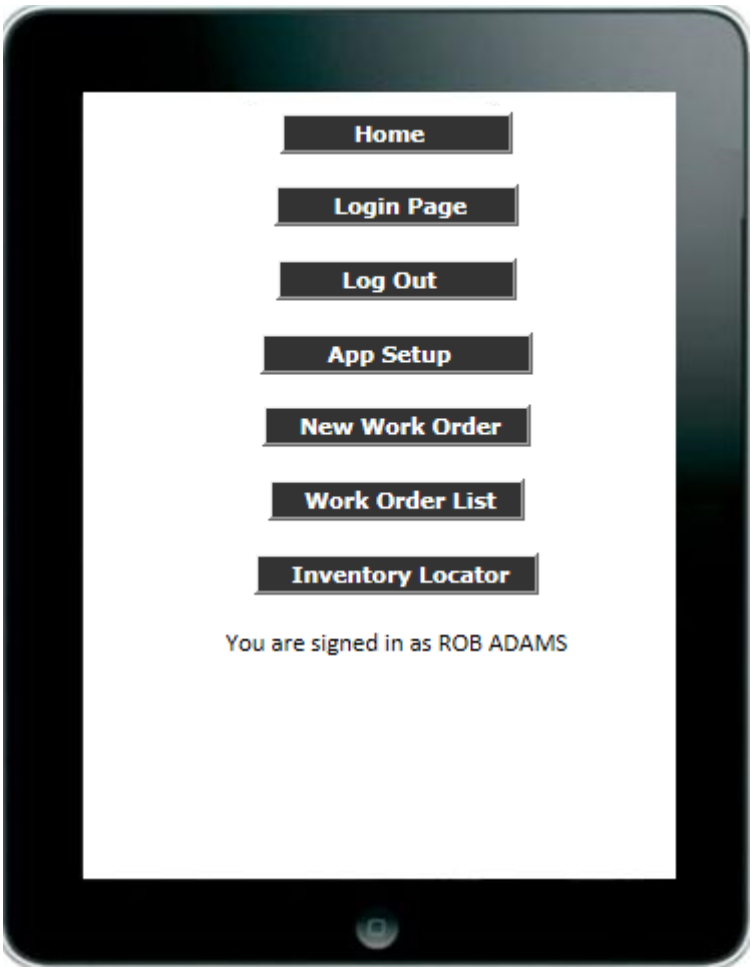
Mobile Device User Instructions

1. Enter the URL that is designated for your QuickApp and login.



Copyright© 2012 -2013 by TeamWORKS Solutions, Inc. All Rights Reserved

3. After logging in you will see the QuickApp Main Menu. Your first login will ask you to setup your Default status for the Work Order list. Setting up your default status will set up your login for use in TeamWORKS and will customize your work order list when you login. ***Note: See your TeamWORKS Administrator for detailed instructions.***



Home Takes you to the home page screen

Login Page Takes you to the login screen

Log Out Logs you out of the TeamWORKS QuickApp

App Setup Takes you to the TeamWORKS QuickApp Application setup. ***NOTE: This feature is optional.***

New Work Order Allows users to create new work orders.

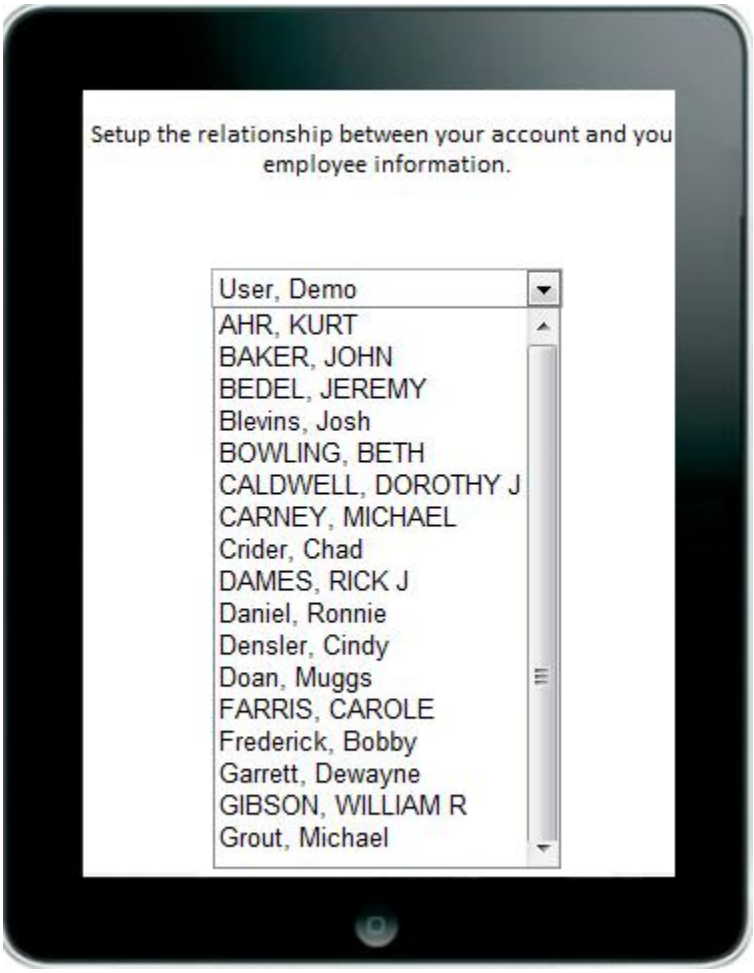
Work Order List Shows the user's Work orders

Copyright© 2012 -2013 by TeamWORKS Solutions, Inc. All Rights Reserved

Inventory Locator Allows users to locate inventory items that are in stock.

4. To set up your default settings Click or Tap **App Setup** ***NOTE: This feature is optional.***

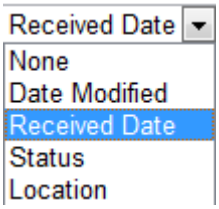
5. Select from the drop down list the user of the device and Click **Save**



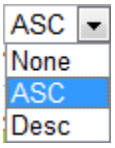
Copyright© 2012 -2013 by TeamWORKS Solutions, Inc. All Rights Reserved

6. Once setup, Click or Tap **Work Order List** to show your work orders.

8. Dropdowns at the top part of the page allows users to customize how to view or retrieve their work orders.

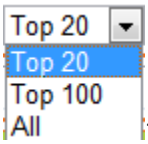


Allows you to retrieve by Date Modified, Received Date, Status or Location

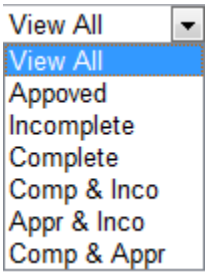


This will allow you to sort your list from Ascending to Descending.

Copyright© 2012 -2013 by TeamWORKS Solutions, Inc. All Rights Reserved



This will allow you to display the Top 20, Top 100 or all the work orders



Allows users to select what WO status(es) will be viewed. Click/Tap GO

NOTE: These are already predefined and no other statuses are available..

To Search for a specific work order type in the work order number

Click or Tap Go.

Menu Takes you back to the previous screen Main menu

Copyright© 2012 -2013 by TeamWORKS Solutions, Inc. All Rights Reserved

The user will be able to scroll down and see the list of workorders.

Copyright© 2012 -2013 by TeamWORKS Solutions, Inc. All Rights Reserved

The Work Orders are color coded by status.

Green: Complete, Submitted, Material Delay, Rejected and Hold

Blue: Incomplete

Red: Approved

The user would then click/Tap on the [Work Order Details]

Then the user will have multiple options

Back Go back to previous screen

Save Save the Record

New Labor Add Labor hours to work order

Copyright© 2012 -2013 by TeamWORKS Solutions, Inc. All Rights Reserved

Labor List View/edit the existing labor for that work order

New Inv. Enter an Inventory Item used for the work order

Inv. List View/edit the Existing Inventory items issued to this work orders

New Pur. Enter any purchases for the work order

Pur. List View/edit Existing Purchases for that work order

Complete Change the status of the work order

Back **Save** Located at the top and bottom of the screen allows users to go back/update and save an existing record.

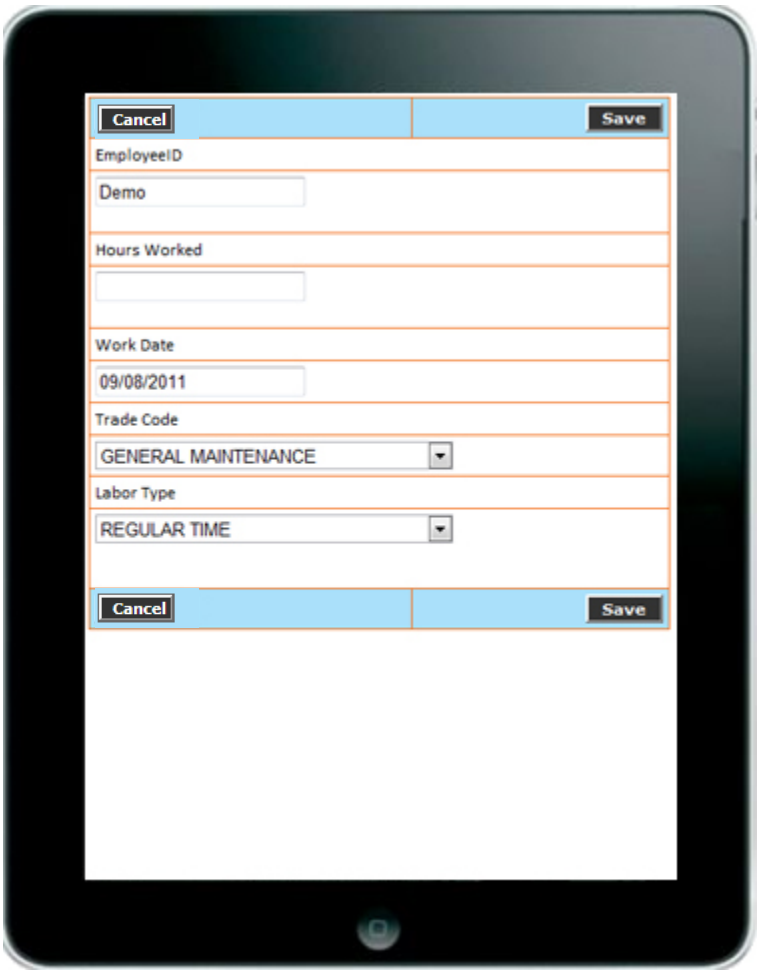
Copyright© 2012 -2013 by TeamWORKS Solutions, Inc. All Rights Reserved

Transactions

Entering Labor Transactions

New Labor The user enters the Hours worked,Work Date, Trade code and Labor type as needed.

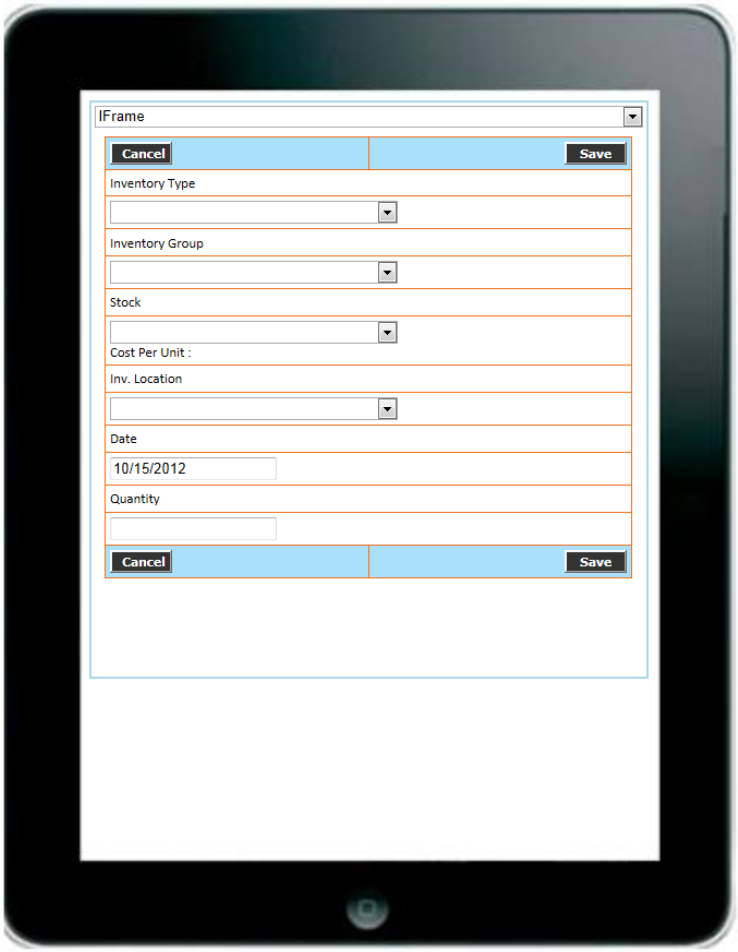
Same funcitionality when viewing/editing from the **Labor List**



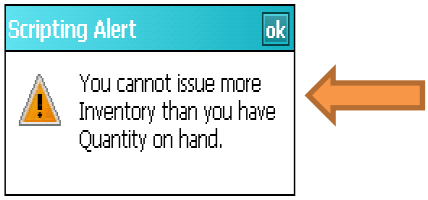
Copyright© 2012 -2013 by TeamWORKS Solutions, Inc. All Rights Reserved

Entering Inventory Transactions

New Inv. Inv. List Users can view or edit inventory used for the work order selected in several ways. If you know the Stock number enter the number or select from the list and the other fields will auto populate. You can also filter down by selecting the Inventory Type, (Mechanical, Custodial, and Instructional) and inventory Group then select from the Stock number. Once selected the Cost per unit and Inventory location will auto populate. The date can be changed (by default it uses the current date) then enter the Quantity used for the work order. Once complete, Click or Tap Save



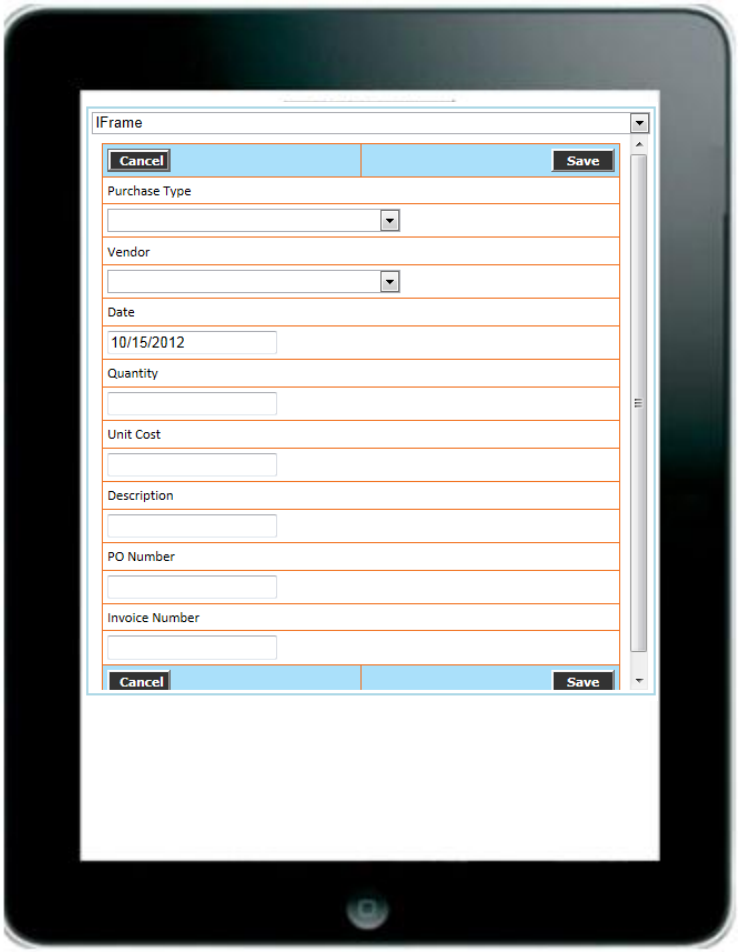
NOTE: In this event the user receives the following alert, contact the Warehouse to rectify any issues.



Copyright© 2012 -2013 by TeamWORKS Solutions, Inc. All Rights Reserved

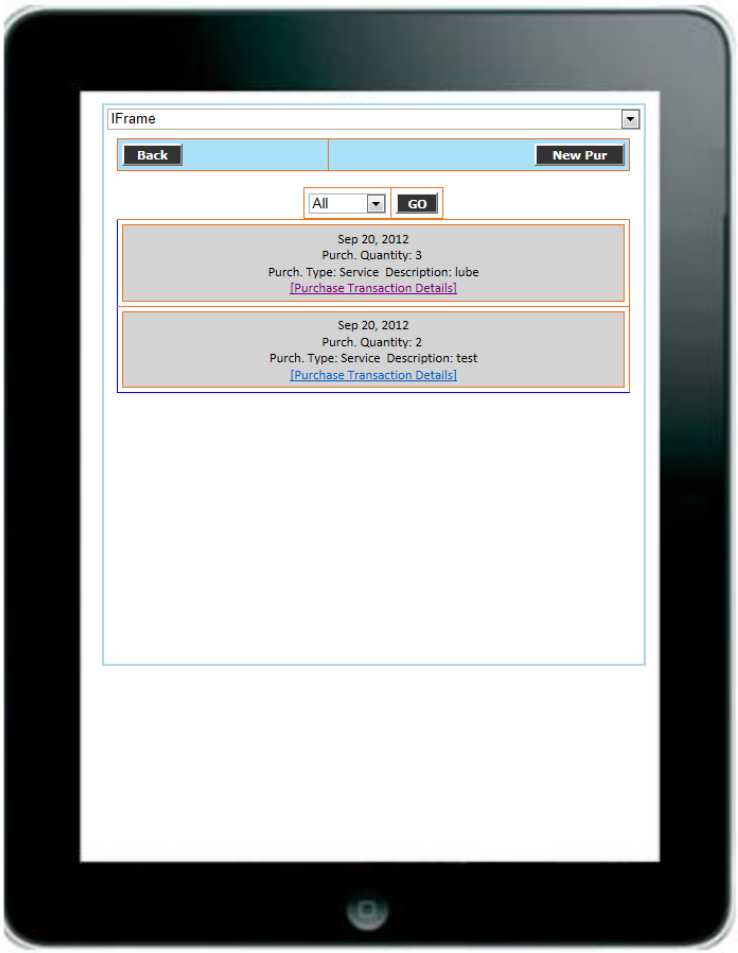
Entering New Purchase Transactions

New Pur. Users can enter new purchase for the work order selected.



Copyright© 2012 -2013 by TeamWORKS Solutions, Inc. All Rights Reserved

Pur. List Users can view purchases for the work order selected and details of the purchase by selecting the Purchase Transaction Details.



Copyright© 2012 -2013 by TeamWORKS Solutions, Inc. All Rights Reserved

Inventory Locator

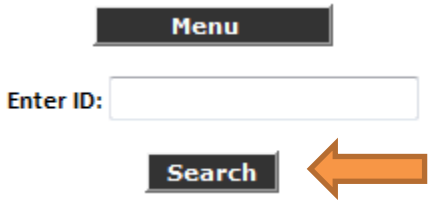
This allows you to search for Inventory by inventory item number.

Click or Tap **Inventory Locator**

Select the Inventory Type

Copyright© 2012 -2013 by TeamWORKS Solutions, Inc. All Rights Reserved

After you select the Inventory Type you enter the inventory item number and Click or Tap the Search Tab.



Customer Support

Email: Support@goTeamWORKS.comz

Telephone: Toll Free (866) 892-0034

Copyright© 2012 -2013 by TeamWORKS Solutions, Inc. All Rights Reserved