fsElite Connect App Training

Agenda

1. Downloading fsElite Connect Mobile App
2. Training on fsElite Connect Mobile App
3. Q&A

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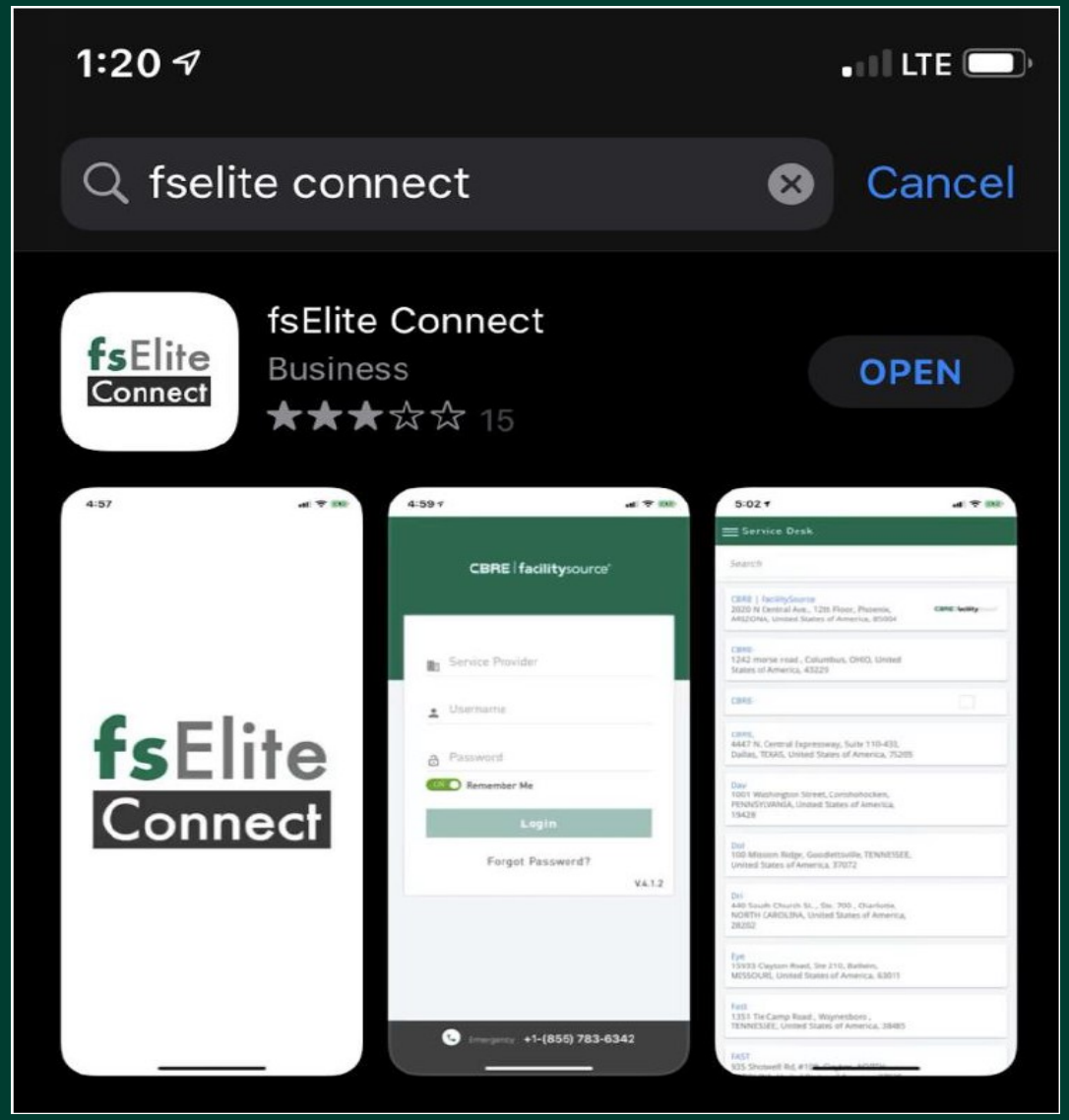
Downloading the App

Apple Device:

- Go to your App Store
- Search “fsElite Connect”
- Touch “get”
- Login to begin using the app

Android Device:

- Go to your Play Store
- Search “fsElite Connect”
- Touch “Install”
- Login to begin using the app



Logging In

Logging into the app is simple and easy. It uses the same information as your login to fmPilot2 on your desktop, just in a different format.

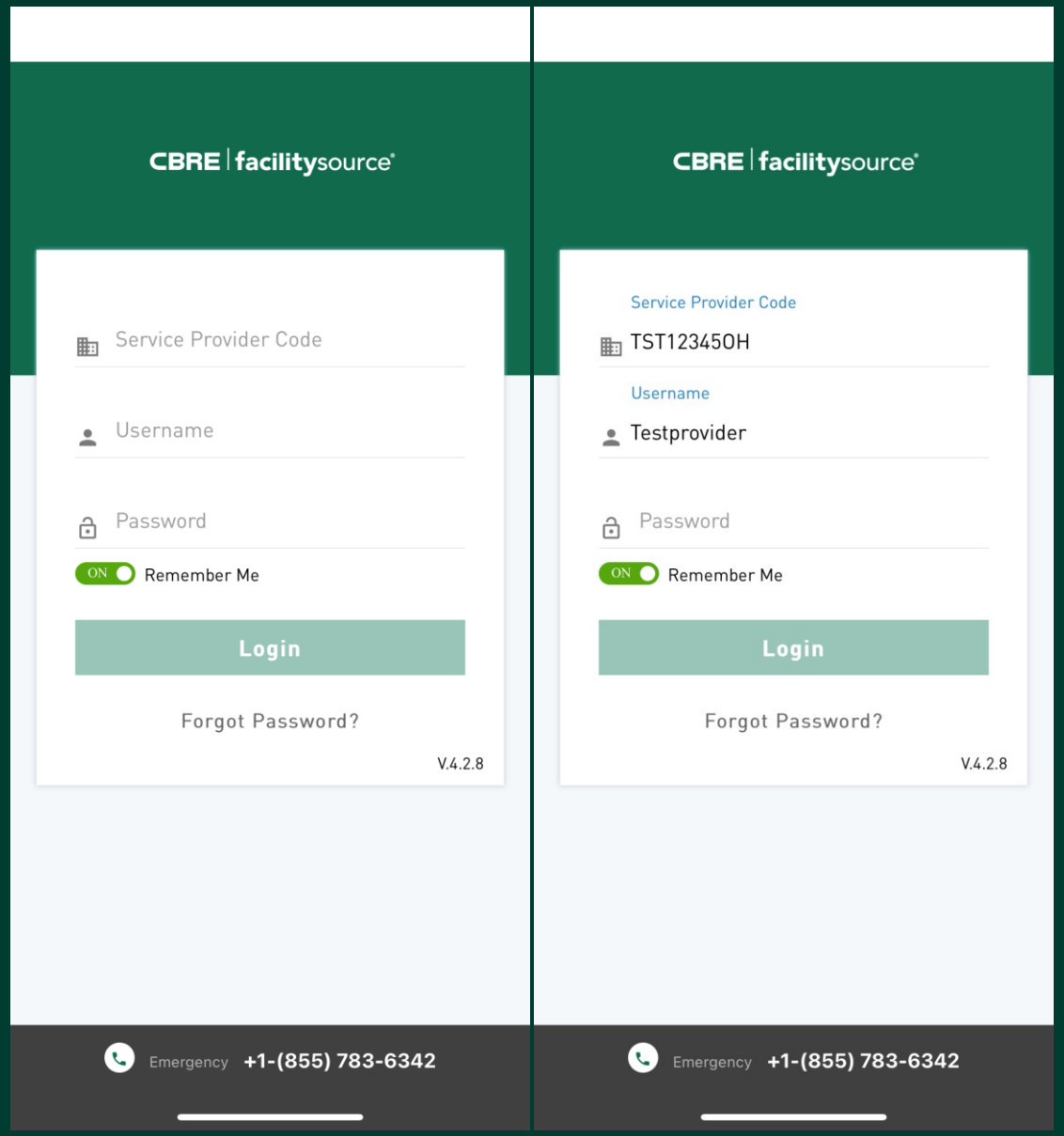
Example Credentials:

fmPilot2 Login: TST12345OH\Testprovider

fsElite Login:

Service Provider Code
(also known as vendor code): TST12345OH

Username: Testprovider



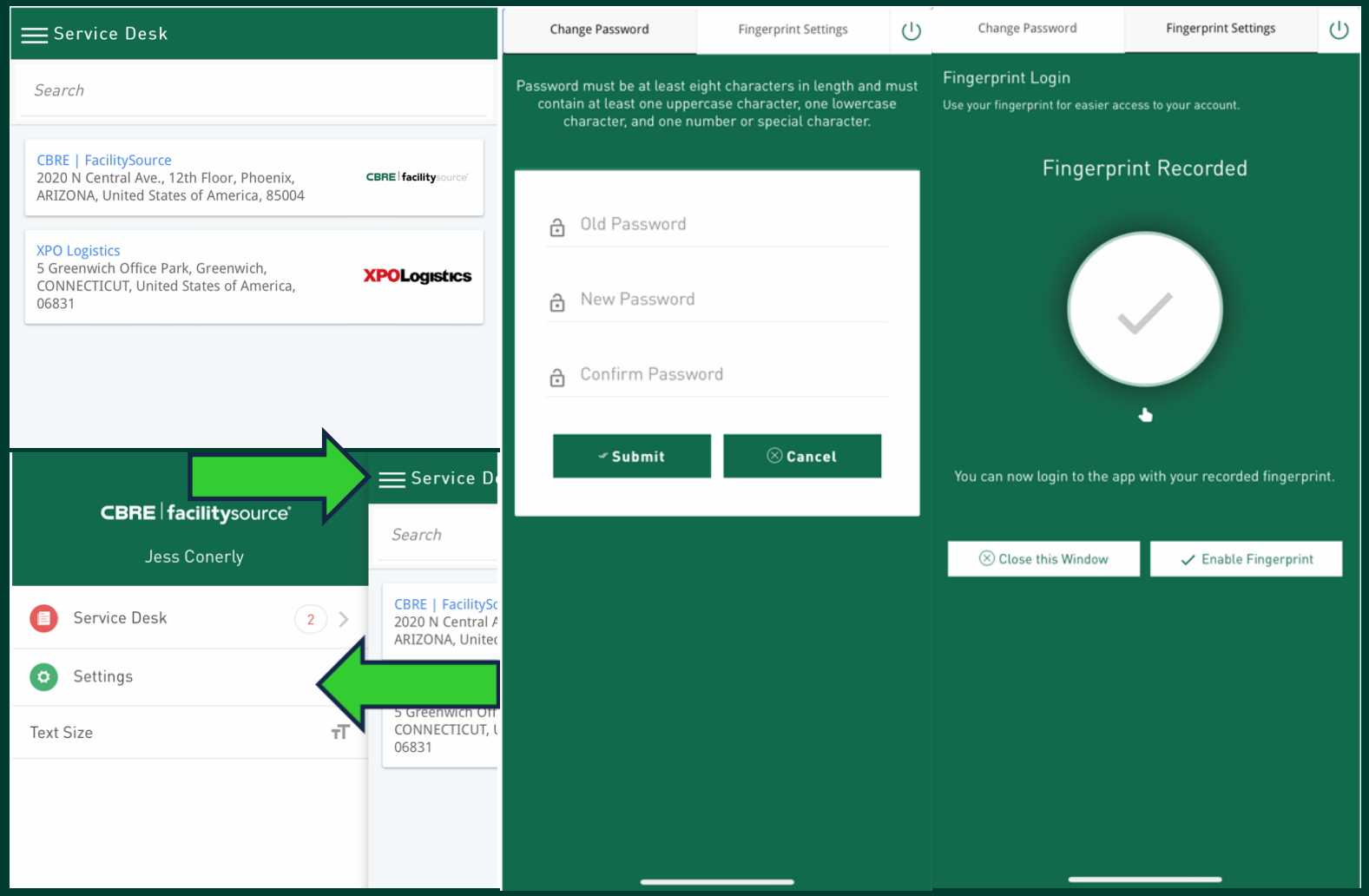
Logging In

Once you have logged into the fsElite Connect Mobile App You can see:

- Your Service Desk. This is based on which clients you serve. If you only have one client, then you will be taken straight into your work order list.

  If you are doing work for IFM, you will select CBRE | FacilitySource.

- Your settings menu (hamburger menu)where you can enable your fingerprint login (assuming your device is capable) and update your password if needed. Face Recognition is not currently available.
- Please note: if techs are sharing a login, I would advise them not to change the password or others will not be able to login.
- The text size feature allows you to change the size of the text.



Accessing Work Orders

Once you log in and click the client you wish to proceed with, you will be brought to the “Work Order List” screen.

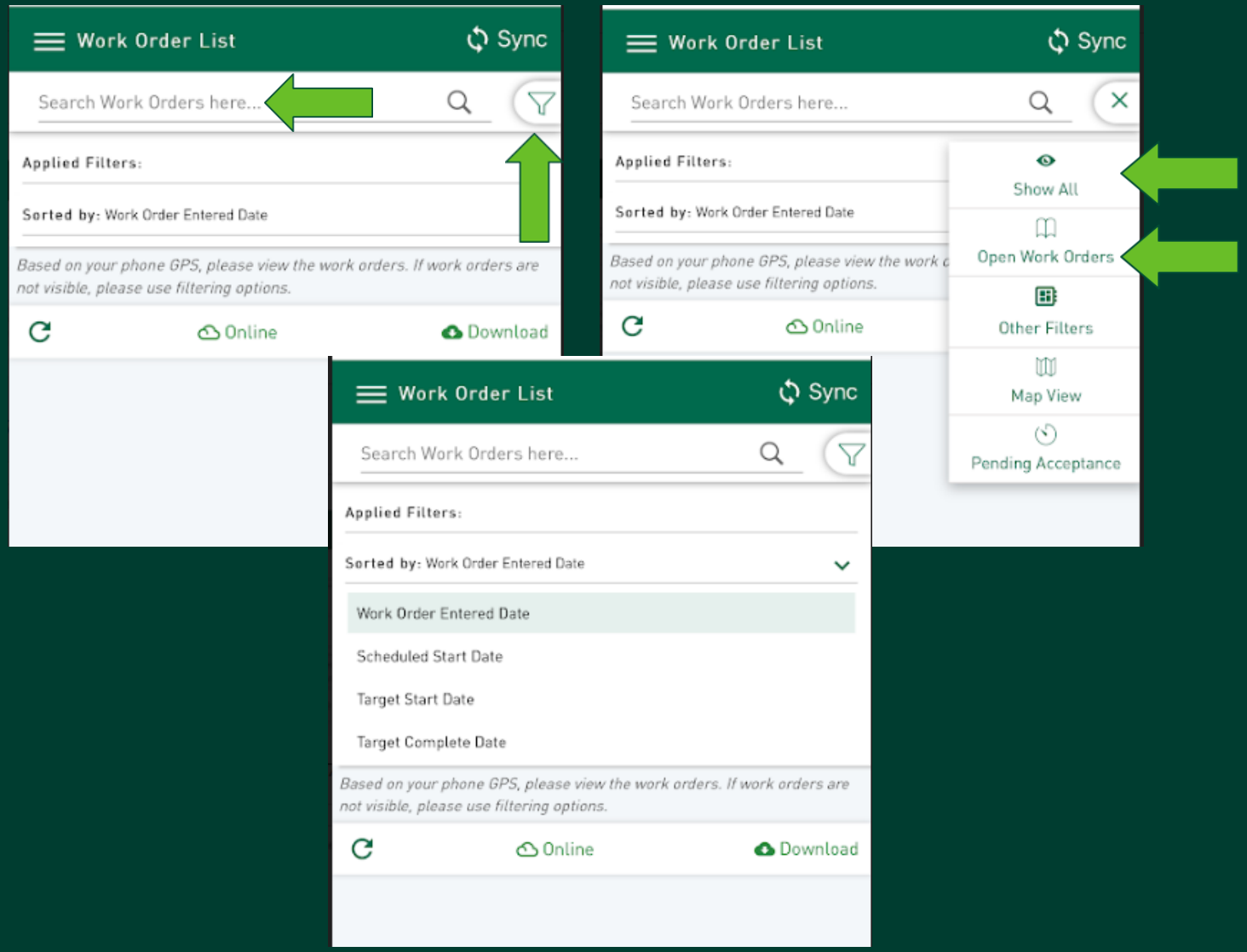
- This will be a list of Open Work Orders for locations assigned to your service provider code, based on your current location.
- Please note work orders will not populate unless you are within half a mile up to 1 mile of the service location due to the geofence we have in place for each of our locations.
- In order to get your work orders to populate without being on site, or if a work order does not populate when you are on site, you will have to use the funnel at the top right of the screen and select Show All. This will bring up all your work orders (examples on next slide).
- When you first come into the app and you are NOT on site, you will receive a pop-up notification that states “No Work Order Found”. You can hit “OK” and use the funnel to find your work order or use the search bar to search for a specific work order number. Please remember to include WEB- or PM- when searching using the search bar.

Work Order List and Filtering

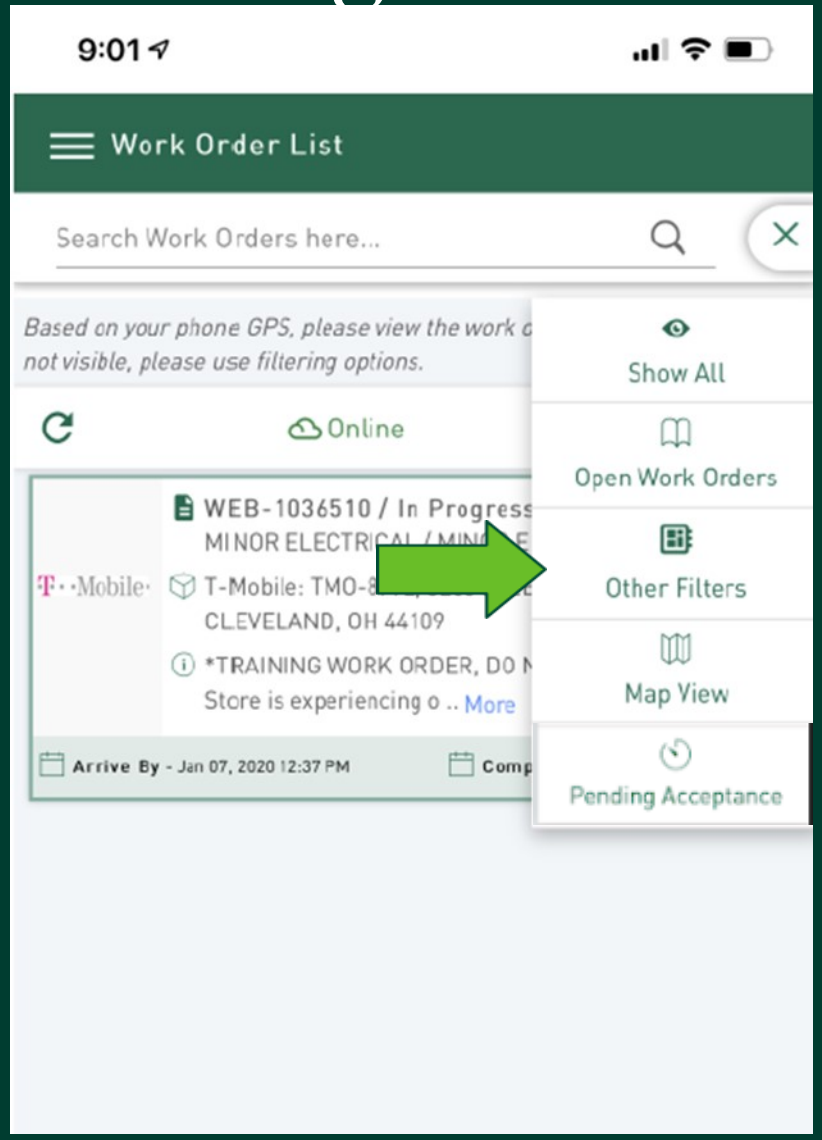
Reminder: If you are NOT within one mile of the location (within the geofence) work orders will not auto populate. Use the funnel or the “Search Work Orders Here” bar to find your work order.

Once you select the funnel icon, you will be given some choices. I suggest to select “Show All” to see all work orders, or you can select “Open Work Orders” to see work order that are in In Progress, Waiting on Material, or Follow Up status.

There is also a sorting feature so you can sort your work order list how you want to see it. You can sort by the work order entered date, the schedule start date (also known as ETA), the target start date, and the target completion date.



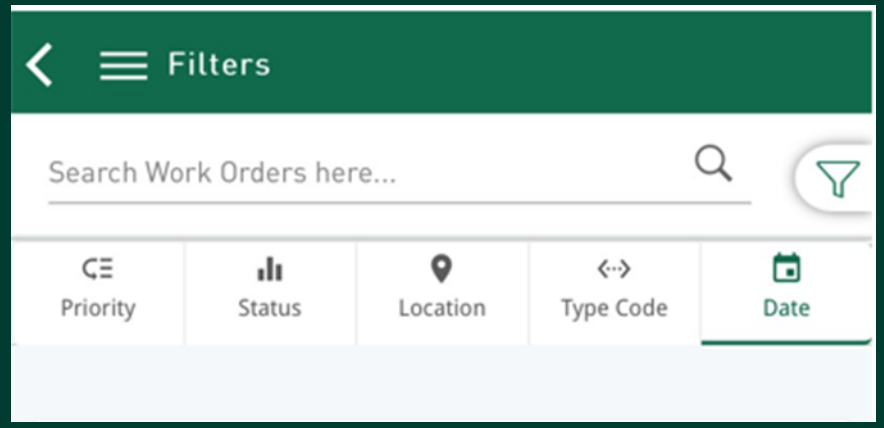
Filtering Continued



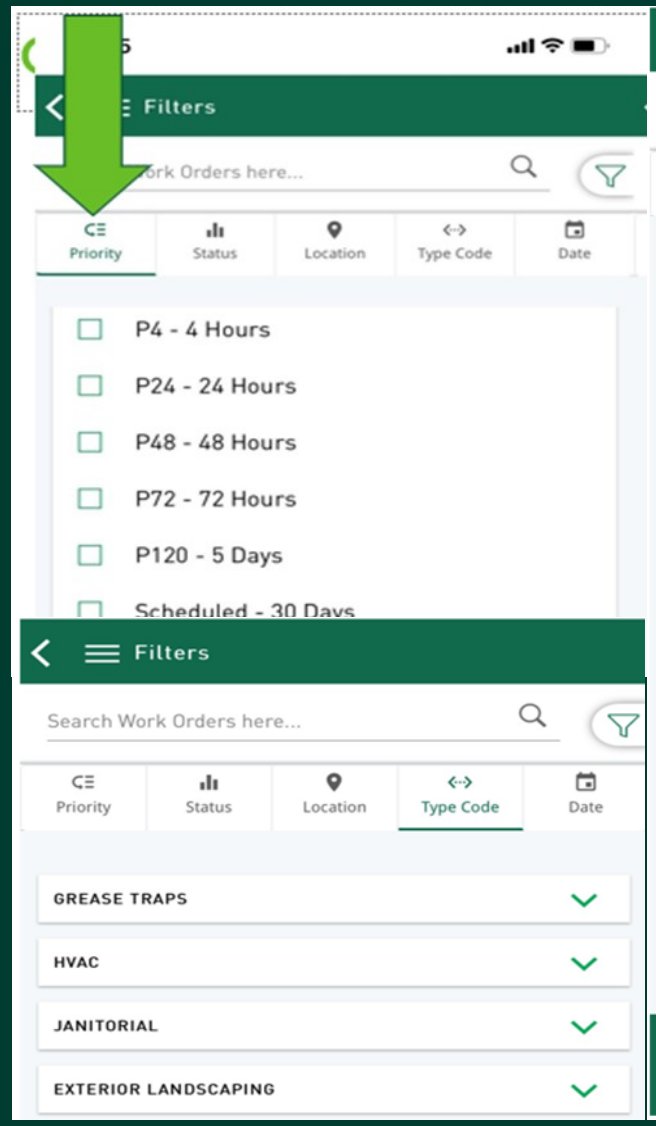
The "Other Filters" option can be helpful as well when searching for work orders.

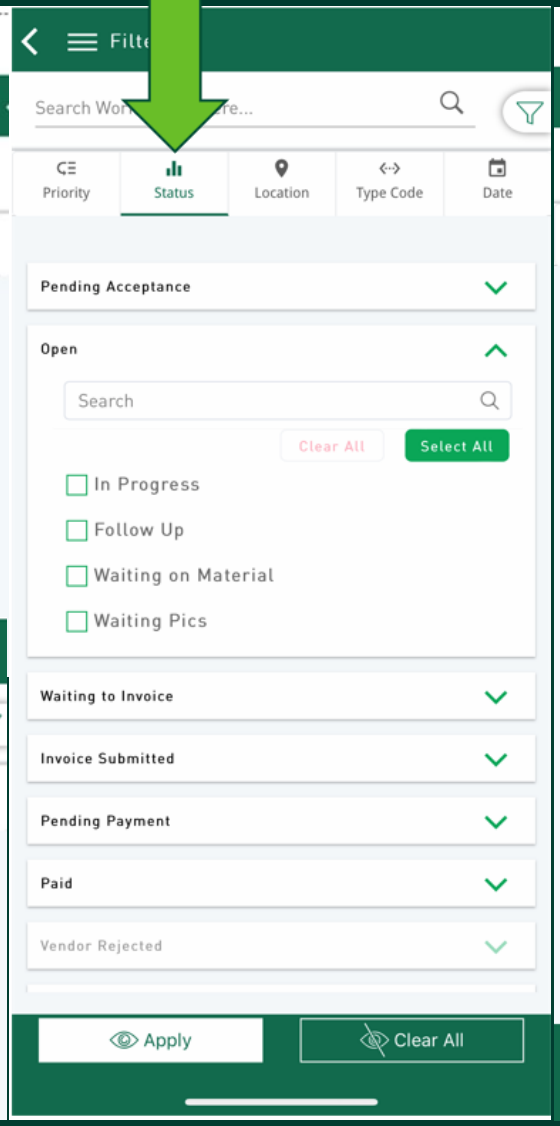
You have several options for finding the work order you are looking for and we will go over them on the next page.

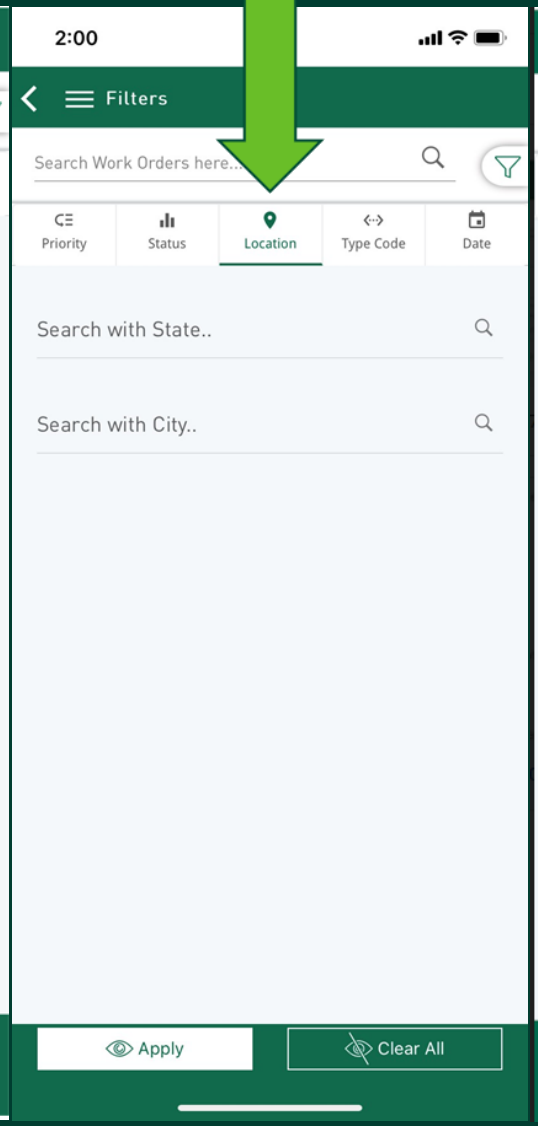
These filter options can be handy when the geofence is down and your work order does not show up, or when you need to search for your next job.

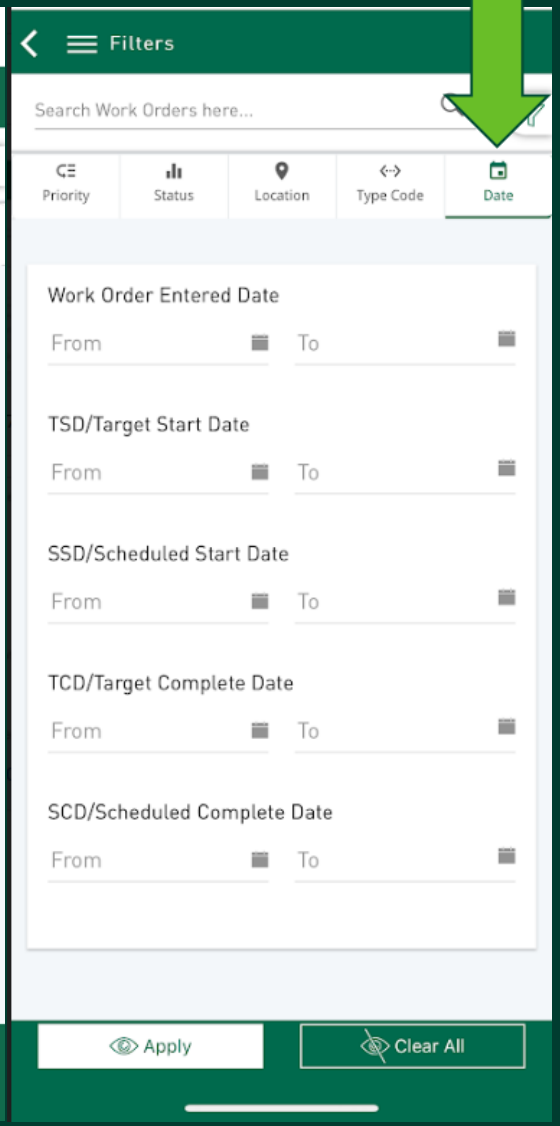


Filtering Options







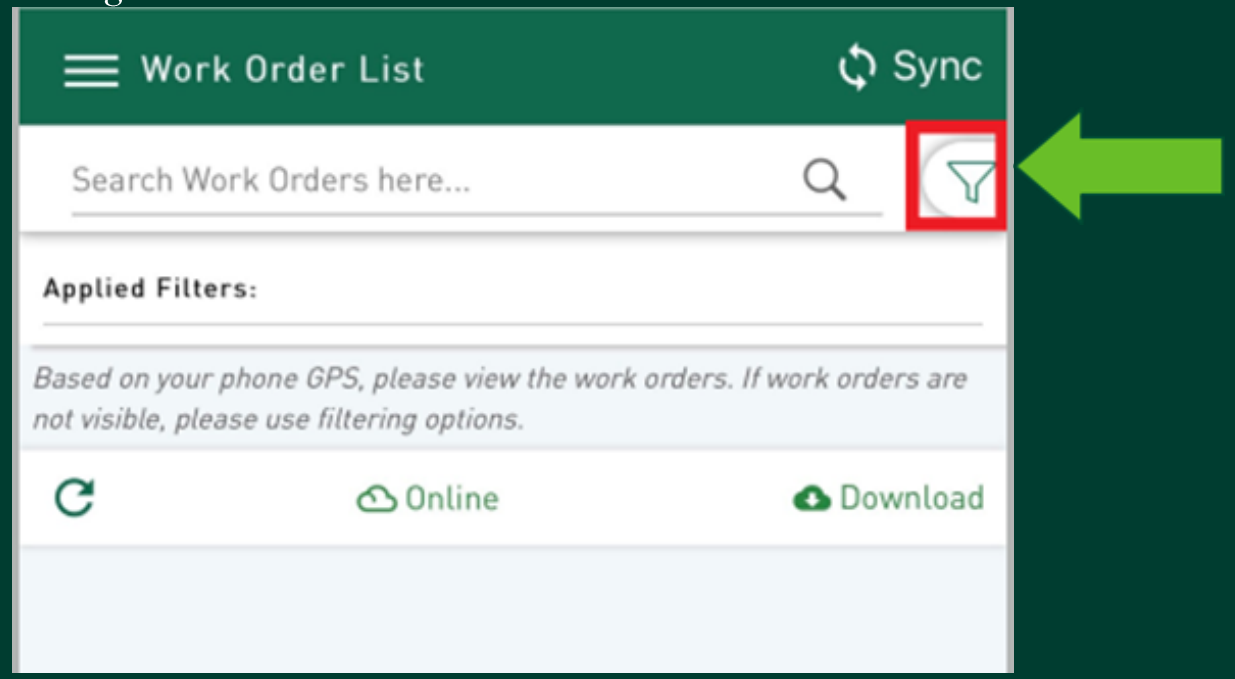


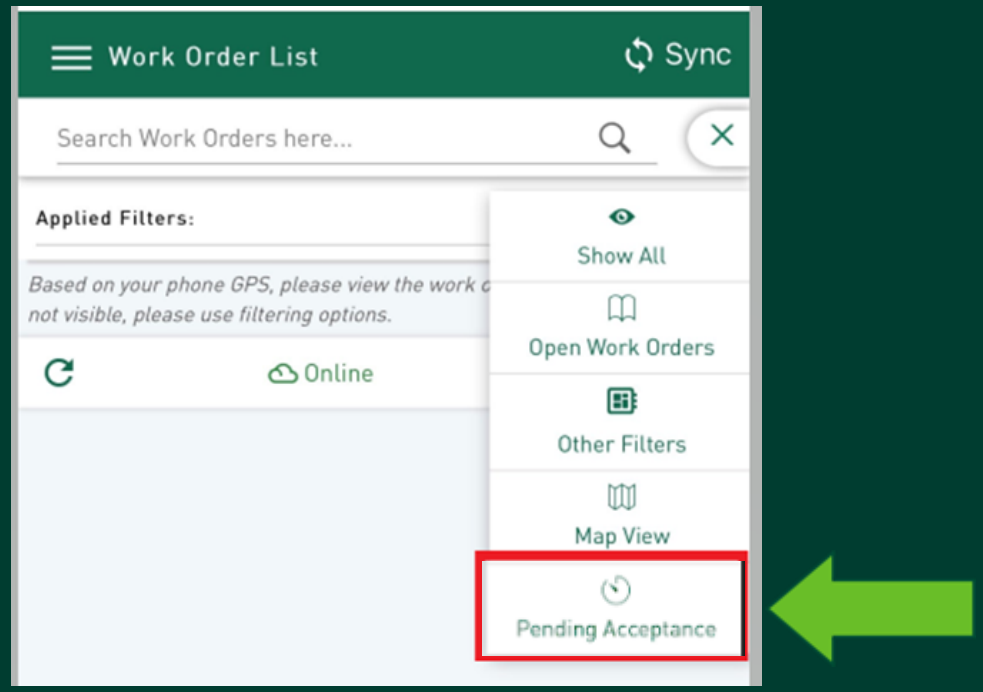
Accepting Work Orders

You do have the option to accept (or reject) work orders via the app if you needed but you must have ADMIN status as your vendor role. Once you select the funnel, you can select “Pending Acceptance” to filter for your work orders in that status.

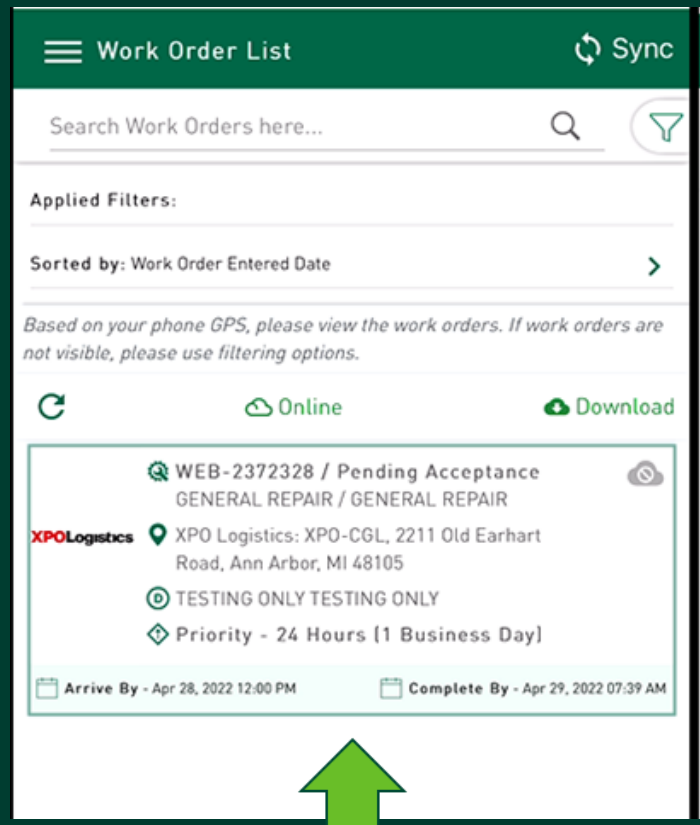
Select the work order and you will be brought to the work order details screen. At the top, you will have the option to accept or reject the work order.

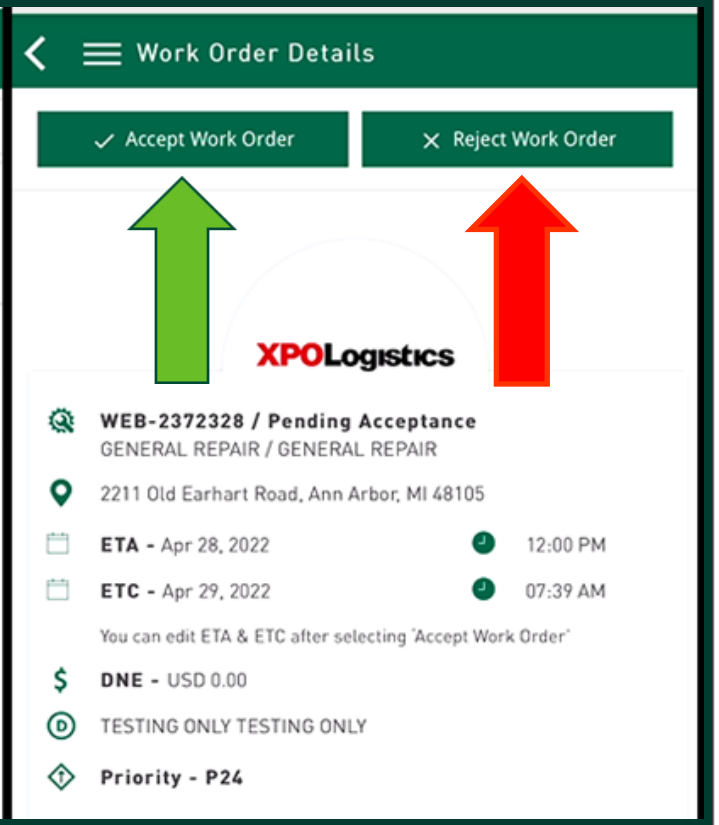
If you select “Accept”, you will be brought to another screen where you can put in your ETA on the work order and any comments you wish to put in such as an update to the client as to when your technician will be on site. If you select “Reject” then you will be asked to provide a rejection reason, just like in fmPilot2. Once you have put in your ETA (if you have one) and your comment, you can select submit to accept the work order. Your work order will then be moved into In Progress.

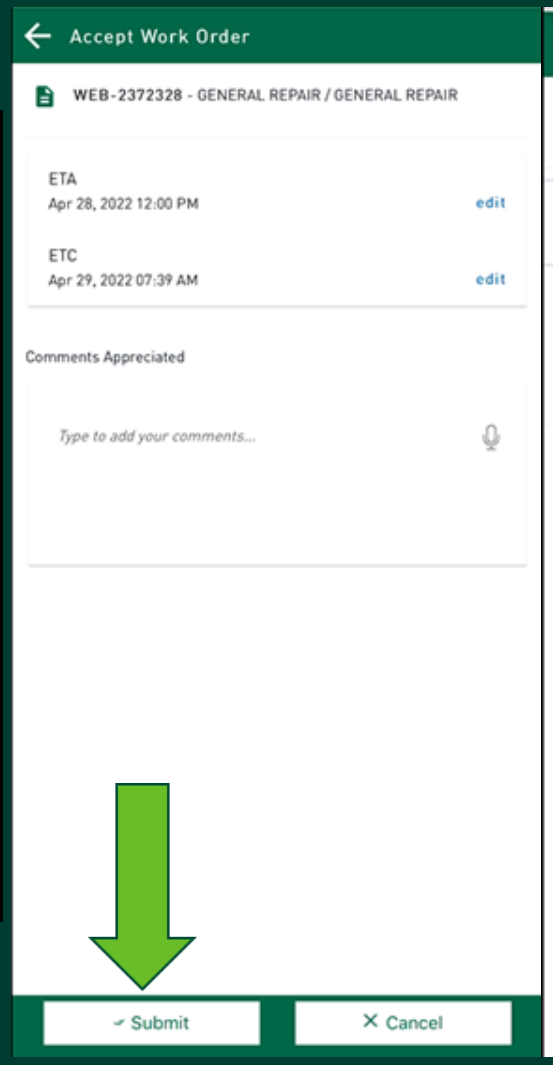


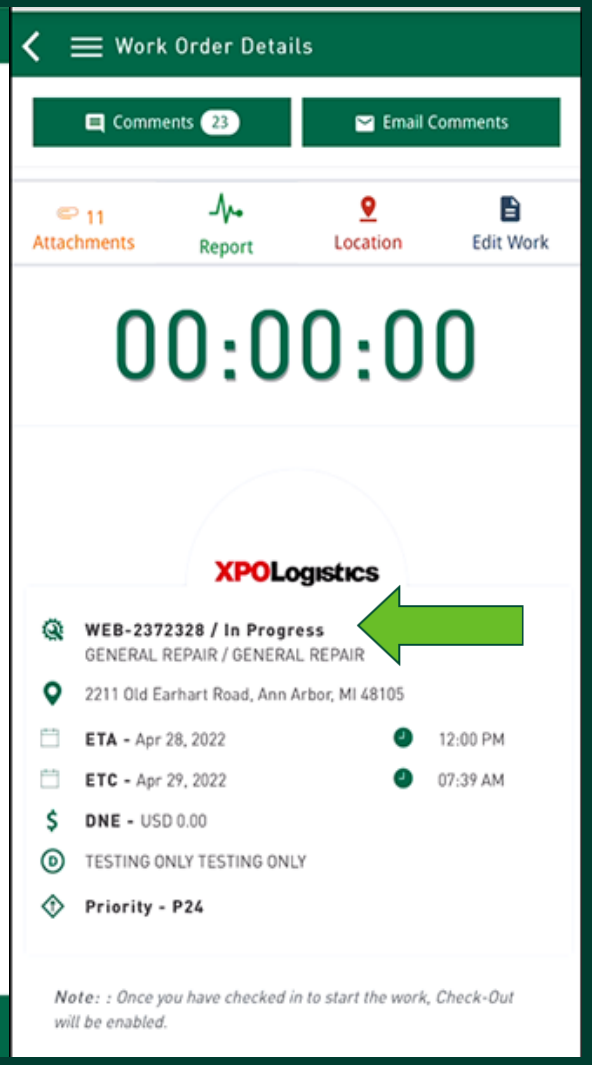


Accepting Work Orders (cont.)







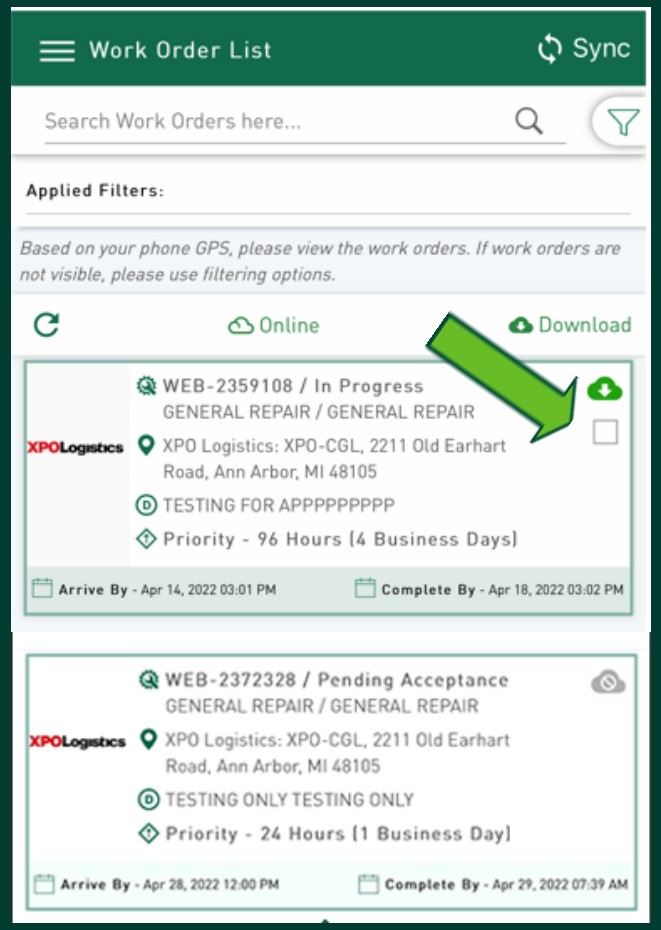


Downloading Work Orders

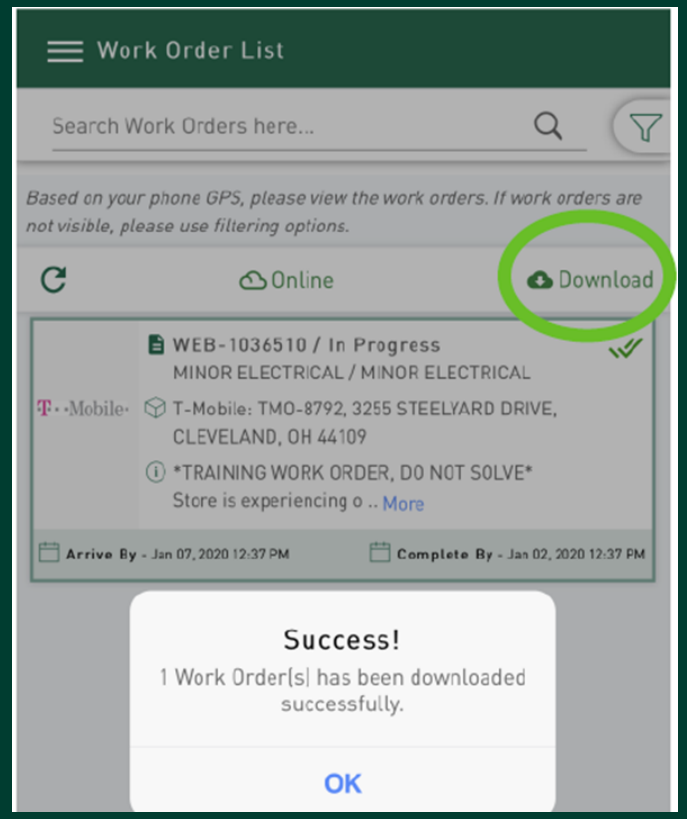
If you are going into an area without cell service or cannot use data, you can download work orders to the app while you are connected to Wi-Fi or have cell service. All changes will be updated in fmPilot2 once you go back online.

Please note: Work Order must be in Vendor Accepted, In Progress, Follow Up, or Waiting on Material in order to download the work order.

You can use the check box to select multiple work orders and then select the "Download" button. If you want to download a single work order, you can select the cloud with the down arrow.



If there is a little green cloud, then the work order is downloadable. If the cloud is grey (second work order pictured), then you will not be able to download the work order unless it is updated to one of the downloadable statuses.



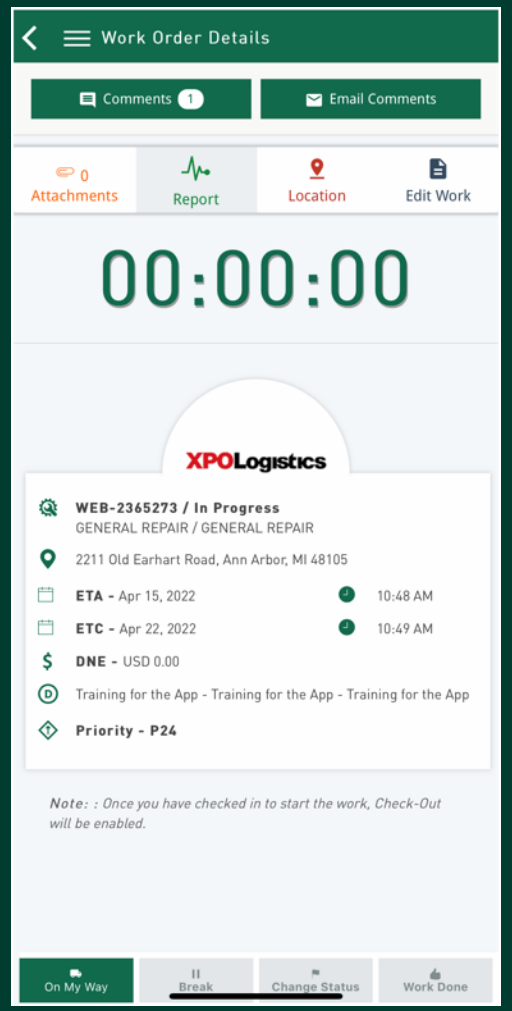
Select download. You will then receive a notification stating the download was successful.

Work Order Flow: Confirm Location Details

- Once you find the correct work order and click into it, you will be brought to the “Work Order Details” screen.

- Here you can confirm the work order details such as the work order number and the status of the work order, address of the location, the DNE, and the description of the work order.

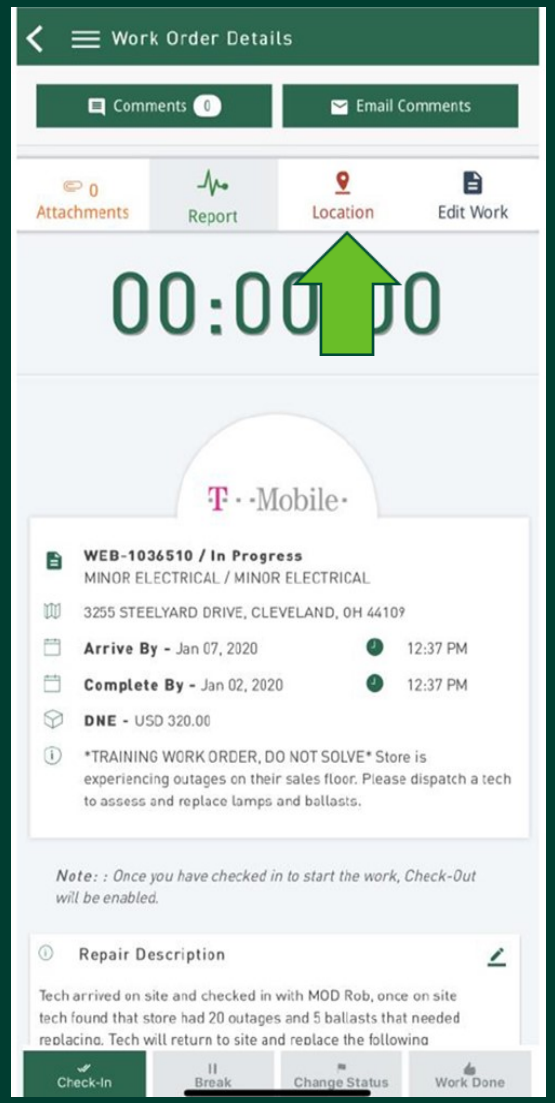
- *Please note, if a technician is set up as a “Mobile Only” user, they will not be able to see the DNE in the app.*

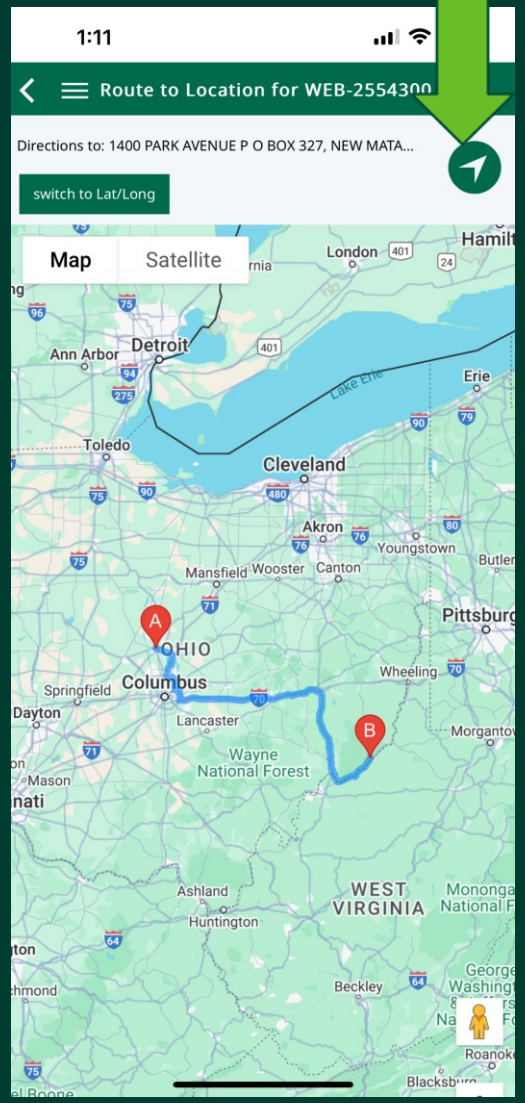


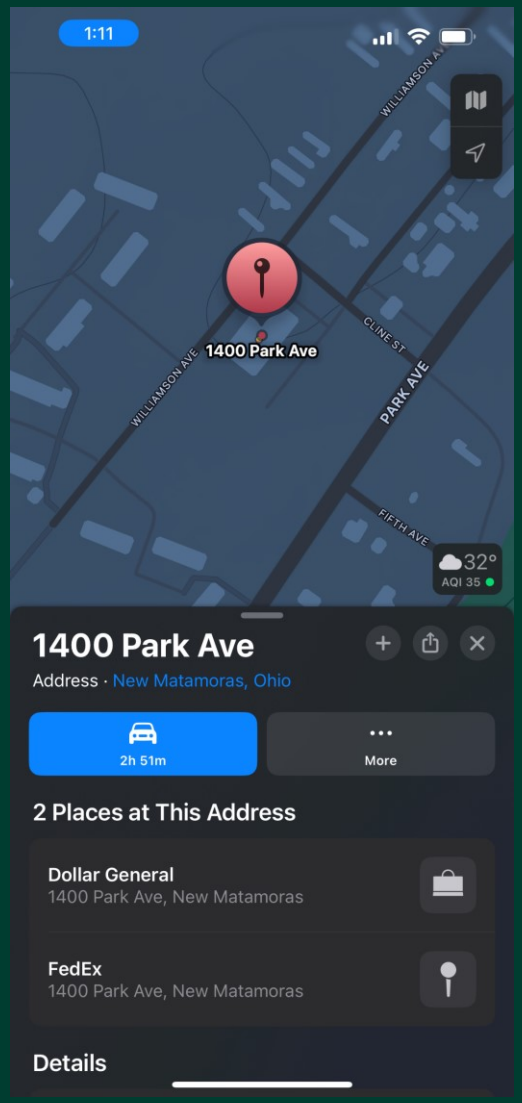
Location and Navigation

- Once you find your work order and open it, if you need to get directions to the site you can select “Location” at the top of the work order. This will bring you into the “Route to Destination” screen. This page gives you the ability to link into your device’s turn by turn navigation system by clicking the small white circle with the green arrow at the top right of the page.

- Using this feature allows you to navigate to job sites seamlessly through the app.







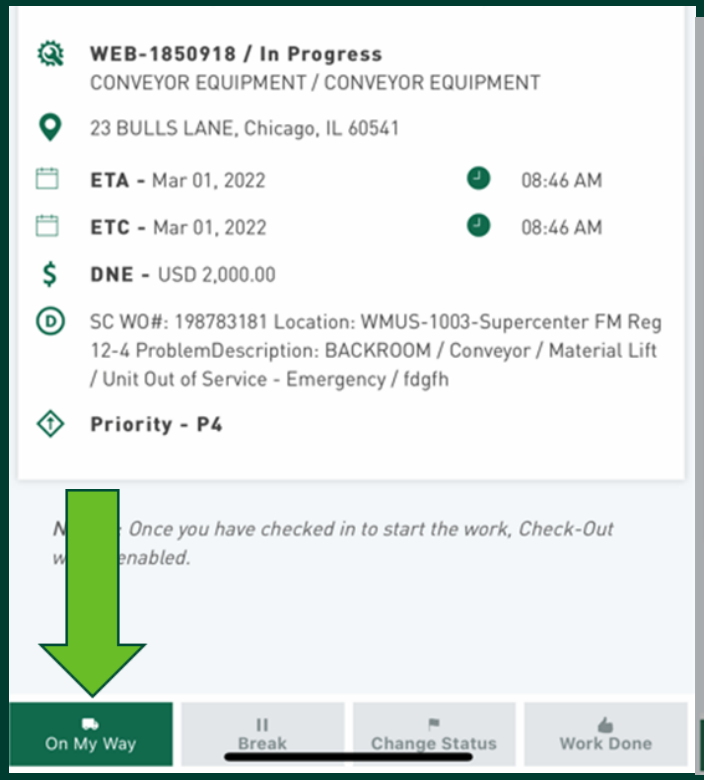
On My Way Feature and How to Use It

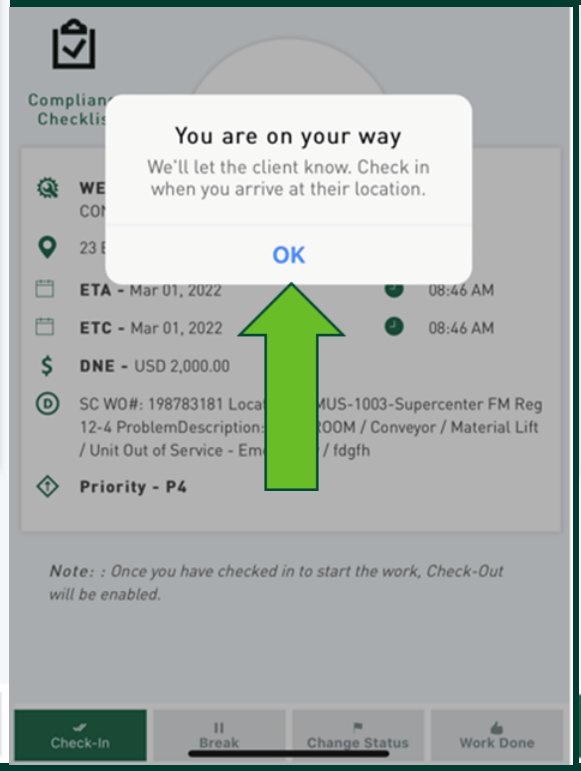
Let the client and their team know that you are on your way by using the “On My Way” button in the work order!

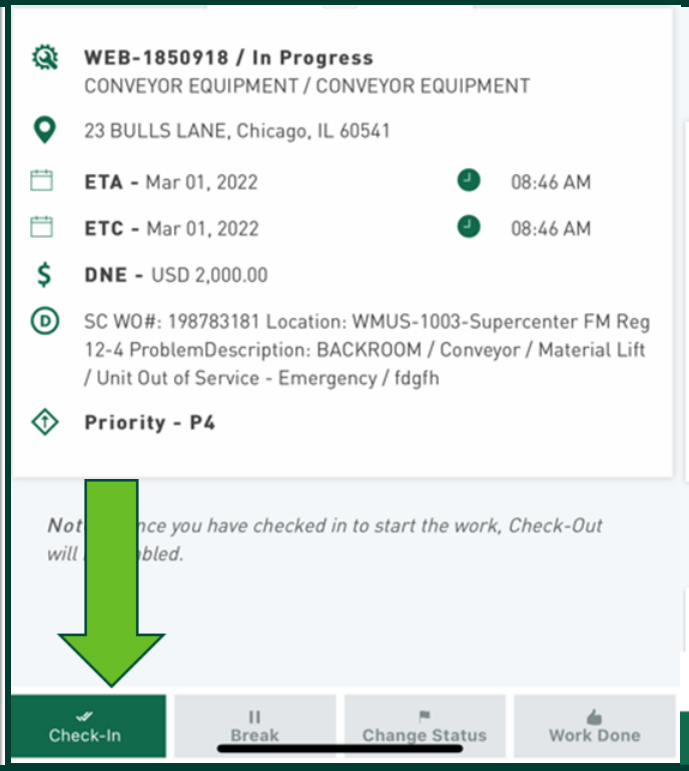
Once you are in your work order, you will be able to use the “On My Way” feature. Here’s how:

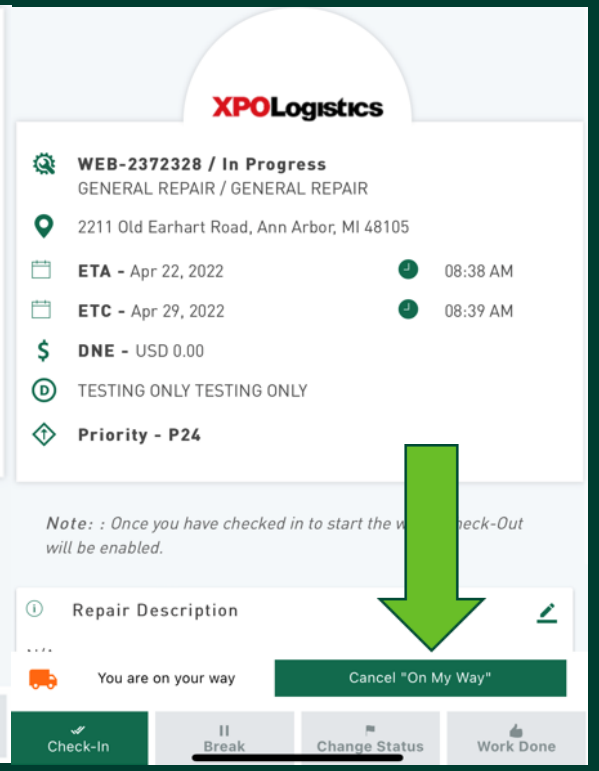
- Either search or filter for your work order (as mentioned on slides 7-10)
- Download your work order if you will be in an area with poor cell service or no Wi-Fi. If you do not download the work order, then the information will not sync once you get back to an area with service (mentioned on slide 11).
- Click into your work order and you will see the “On My Way” button at the bottom of the screen in green. Click it if you are headed to site.
- Once you select “On My Way”, that button will then turn into the “Check In” button.
- If you select “On My Way” by mistake, you can select the “Cancel On My Way” button.

On My Way


WEB-1850918 / In Progress
CONVEYOR EQUIPMENT / CONVEYOR EQUIPMENT
23 BULLS LANE, Chicago, IL 60541
ETA - Mar 01, 2022
08:46 AM
ETC - Mar 01, 2022
08:46 AM
DNE - USD 2,000.00
SC WO#: 198783181 Location: WMUS-1003-Supercenter FM Reg 12-4 ProblemDescription: BACKROOM / Conveyor / Material Lift / Unit Out of Service - Emergency / fdgfh
Priority - P4
Once you have checked in to start the work, Check-Out
On My Way
Break
Change Status
Work Done

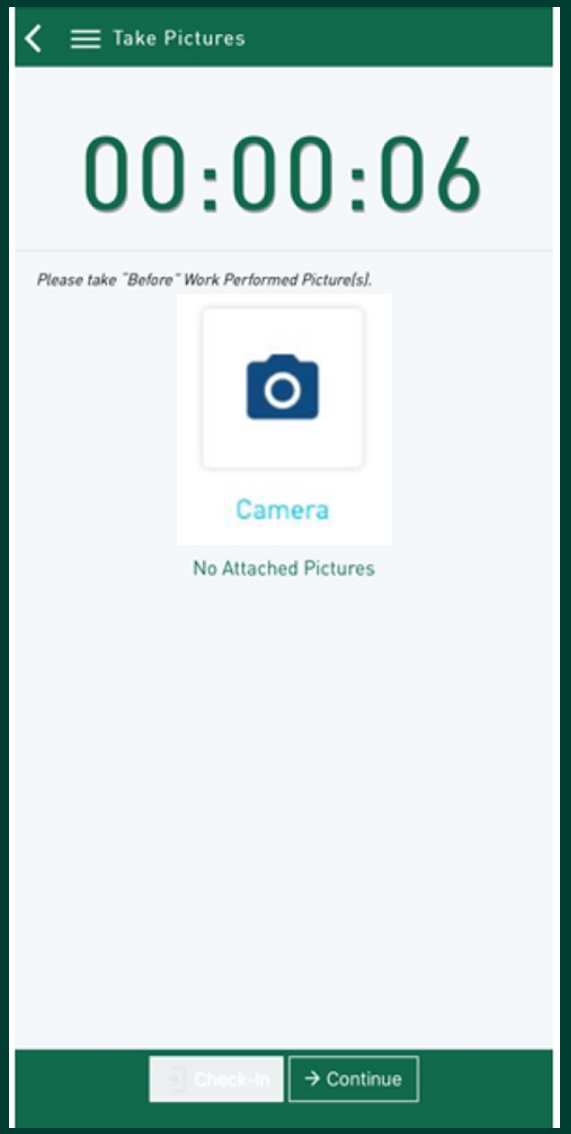

You are on your way
We'll let the client know. Check in when you arrive at their location.
OK
ETA - Mar 01, 2022
08:46 AM
ETC - Mar 01, 2022
08:46 AM
DNE - USD 2,000.00
Priority - P4
Note: : Once you have checked in to start the work, Check-Out will be enabled.
Check-In
Break
Change Status
Work Done

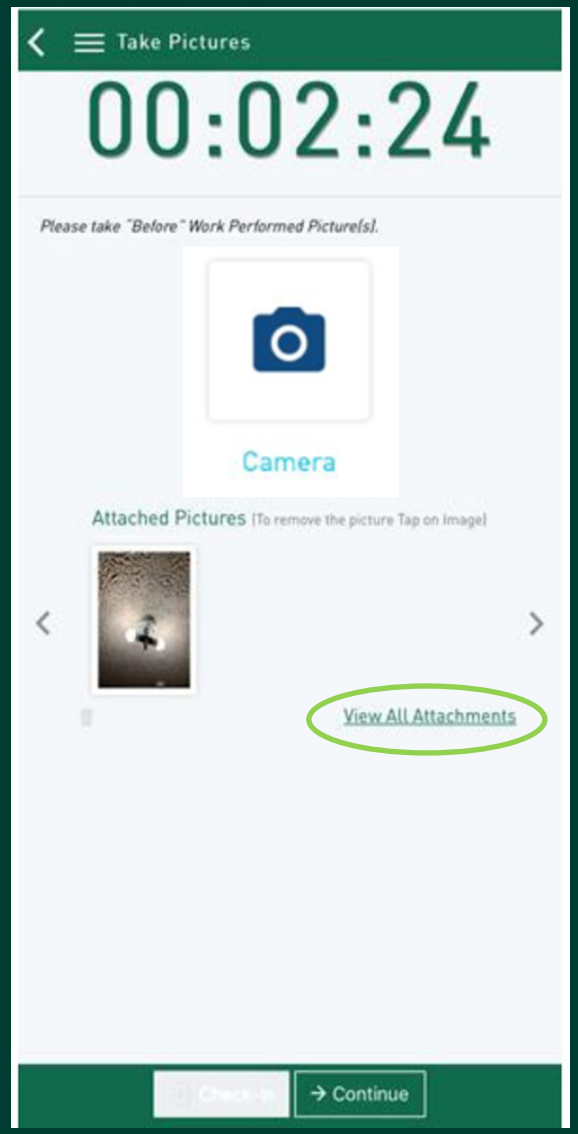

WEB-1850918 / In Progress
CONVEYOR EQUIPMENT / CONVEYOR EQUIPMENT
23 BULLS LANE, Chicago, IL 60541
ETA - Mar 01, 2022
08:46 AM
ETC - Mar 01, 2022
08:46 AM
DNE - USD 2,000.00
SC WO#: 198783181 Location: WMUS-1003-Supercenter FM Reg 12-4 ProblemDescription: BACKROOM / Conveyor / Material Lift / Unit Out of Service - Emergency / fdgfh
Priority - P4
Check-In
Break
Change Status
Work Done


XPOLogistics
WEB-2372328 / In Progress
GENERAL REPAIR / GENERAL REPAIR
2211 Old Earhart Road, Ann Arbor, MI 48105
ETA - Apr 22, 2022
08:38 AM
ETC - Apr 29, 2022
08:39 AM
DNE - USD 0.00
TESTING ONLY TESTING ONLY
Priority - P24
Repair Description
You are on your way
Cancel "On My Way"
Check-In
Break
Change Status
Work Done

Work Order Flow: Photos

- Upon checking in you will be prompted to open your phone's camera to take before photos. Once photos are taken, they will appear below "Attached Pictures".
- You will also see your clock start on the app and this is what is keeping up with your time on site.
- Once all photos have been taken, you can select continue which will take you back to the work order overview screen. However, if you need to edit the photos for any reason, you can click "View All Attachments". We will go over this option on the next slide.

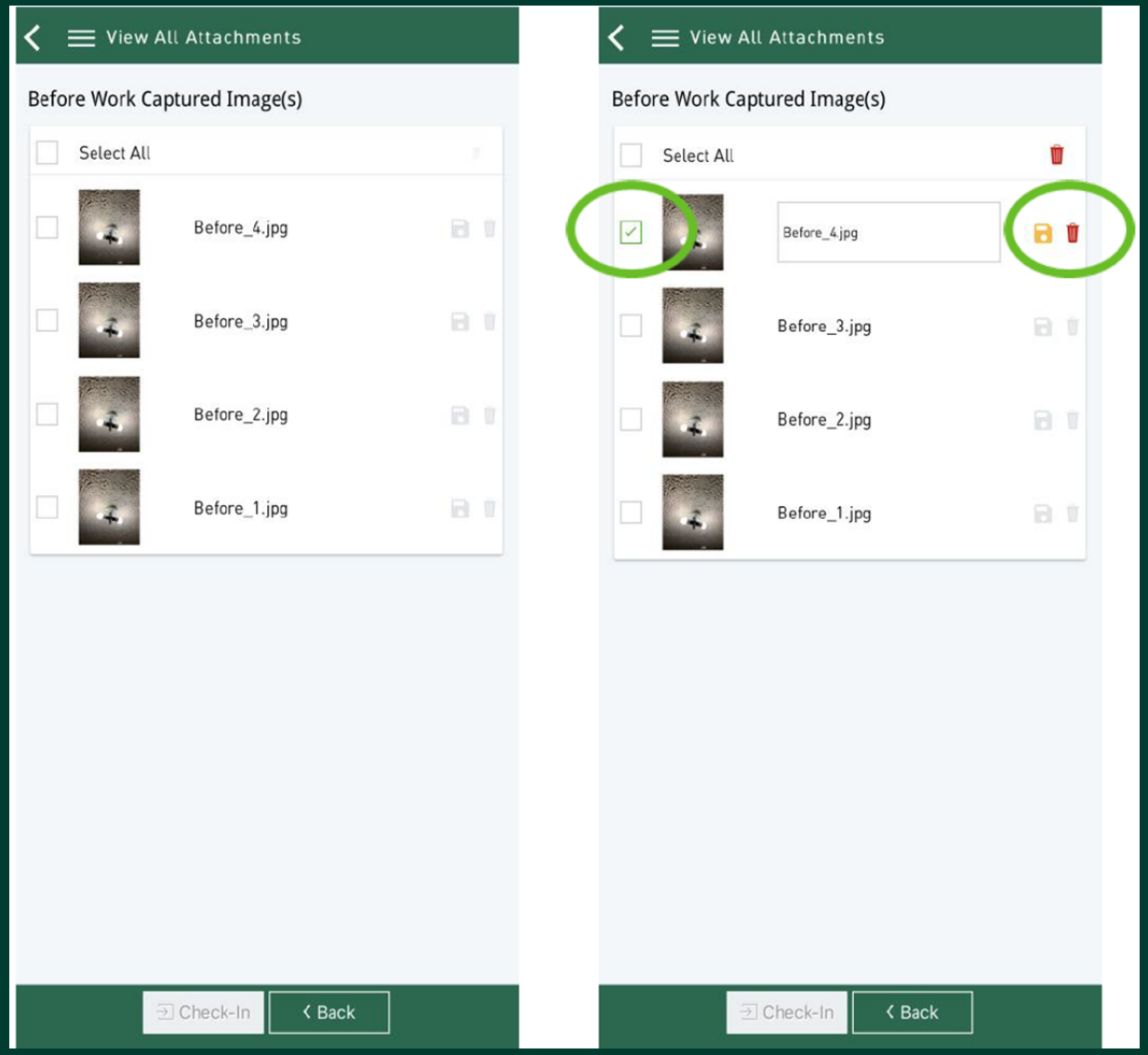




Work Order Flow: Viewing Attachments and Editing Photos

Once you take your photos, you will see a “View All Attachments” button.

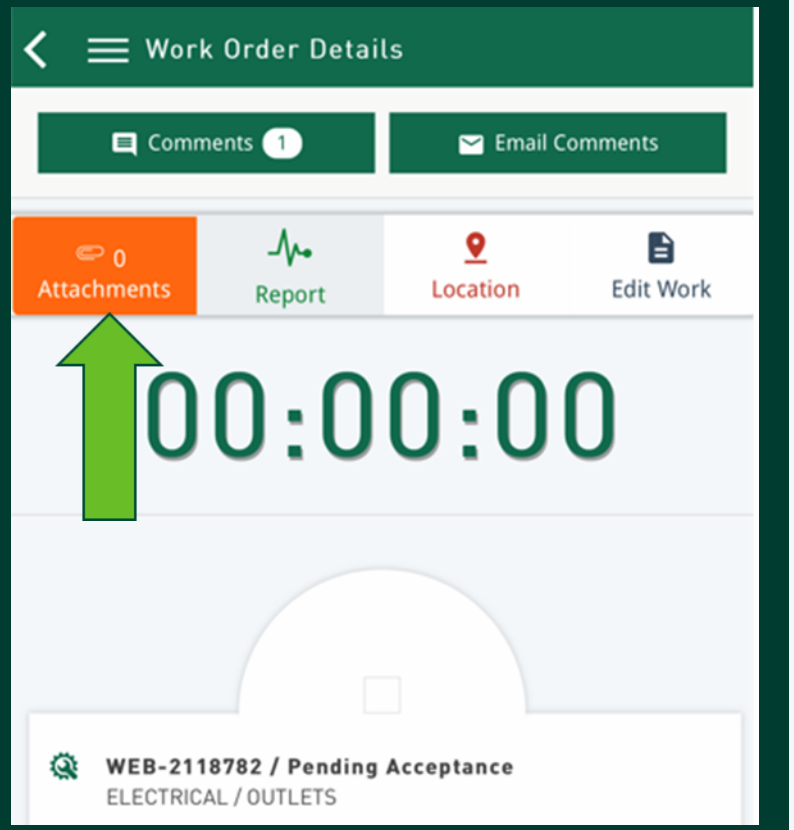
- If you select “View All Attachments”, you will be brought to the View All Attachments page. Here you can select a photo that you want to edit or delete by clicking the check box to the left of the photo.
- You can then edit the name of the photo by clicking into the box where the name of the photo is or you can delete the photo by clicking the red trashcan. If you edit the name of the photo, make sure you hit the yellow floppy disc icon to save.
- Once you are done, you can click “back” at the bottom of the screen to go back or click the arrow at the top of the work order. This can be done while taking photos if prompted as well as on the attachment area of the work order.

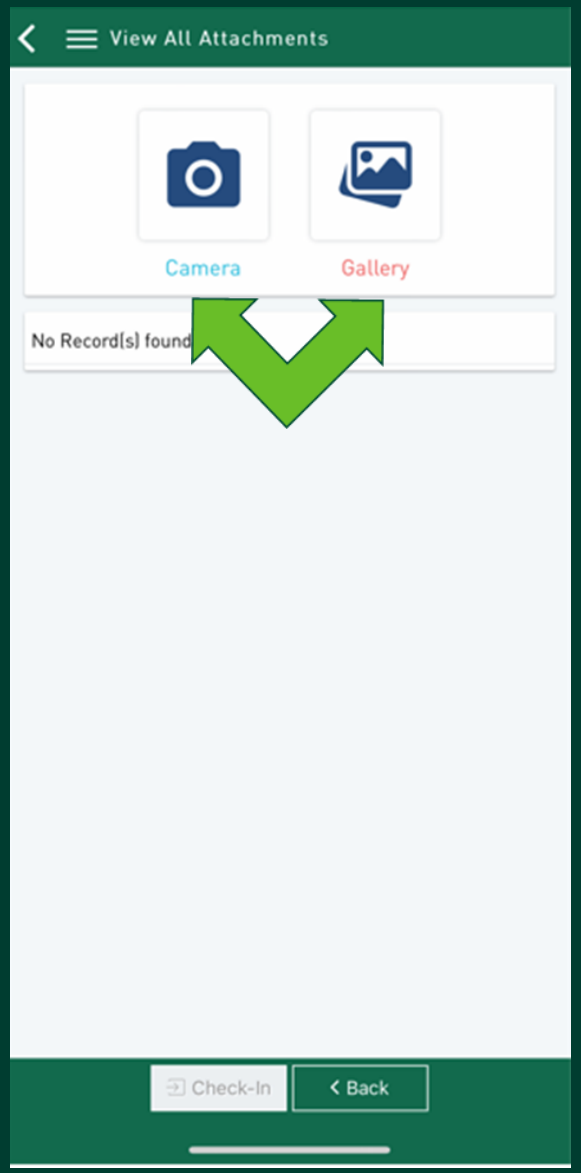


Adding Attachments

If for some reason you are unable to add photos when checking in/out of the work order, there is an attachment area in the work order (highlighted in orange to the right). When you select that button, you will see a camera option and a gallery option on the next page. This makes adding photos after you are done with the work order or after an issue with the app is fixed simple and easy.

This area can be accessed after the work order has been closed out.

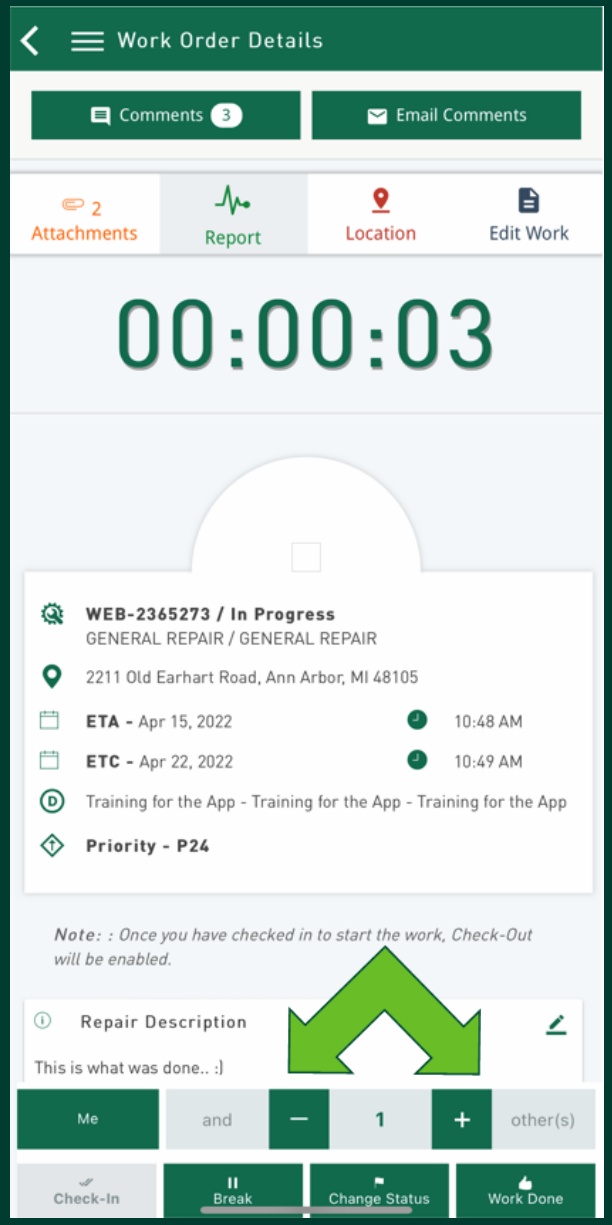




Multi Tech Check In

Multiple technicians cannot be checked into a work order at once whether under a different username or the same. Now you can use the Multi Tech Check In feature to address how many people are with you on site.

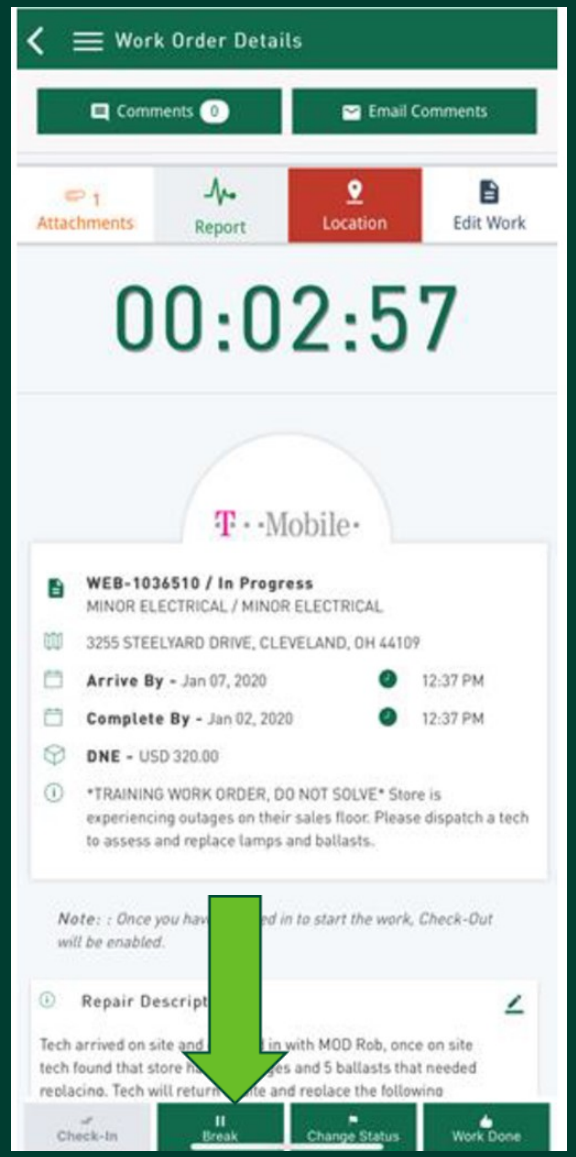
Once you check in and take your pictures, you can use the plus button (above change status at the bottom of your screen) to add additional techs to your work order. “Me” is automatically highlighted and does not need to be pressed. The +/- buttons allow you to adjust how many techs are on site with you. This must be selected once you finish taking your “before” pictures to ensure time for multiple techs is taken correctly.



Work Order Flow: Tracking Time

- Once you are back on the “Work Order Details” screen, you will need to leave your app running in the background to continue to capture your time on site.

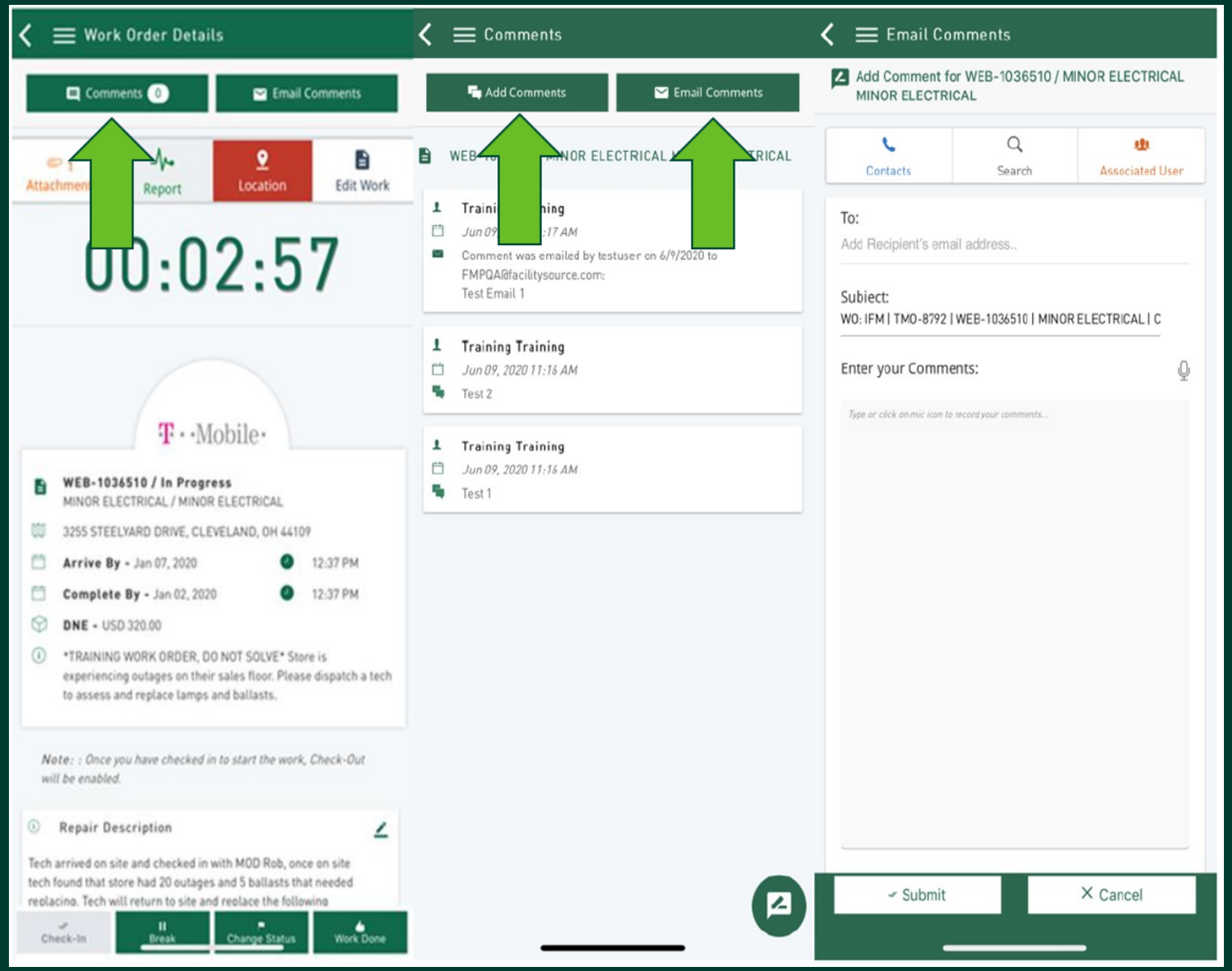
- If you need to pause your billable time for any reason, you can do so with the “Break” button at the bottom of the screen. Once you are done with your “Break”, you will need to click “Check In” to continue working.



Work Order Flow: Communication

- At the top of your “Work Order Details Screen” there is Comments and Email Comments. If you select “Comments” you will be brought into a new page where you can view all the comments that have been put into the work order. At the top of that page, you will see “Add Comments” and “Email Comments”.

- To add a comment, you can select “Add Comment” and hit “Submit” you are done typing in your comment. To email a comment, you can select “Email Comment”, type up your email, and then select from the list of associated users or enter the email address in which you want to send the email to.



Work Order Flow: Status Change

Once you have completed the requested work for the day, but the job is not completely done, you will have the option to either select “Change Status” or “Work Done”. If selecting “Change Status”, you will follow the prompts to check out of the work order by selecting the appropriate status.

- Status Options (examples on next page):

-Pending Quote in the case that the you need a quote to complete the job. *if work is an emergency and can be completed same day, please call in for an onsite DNE increase.*

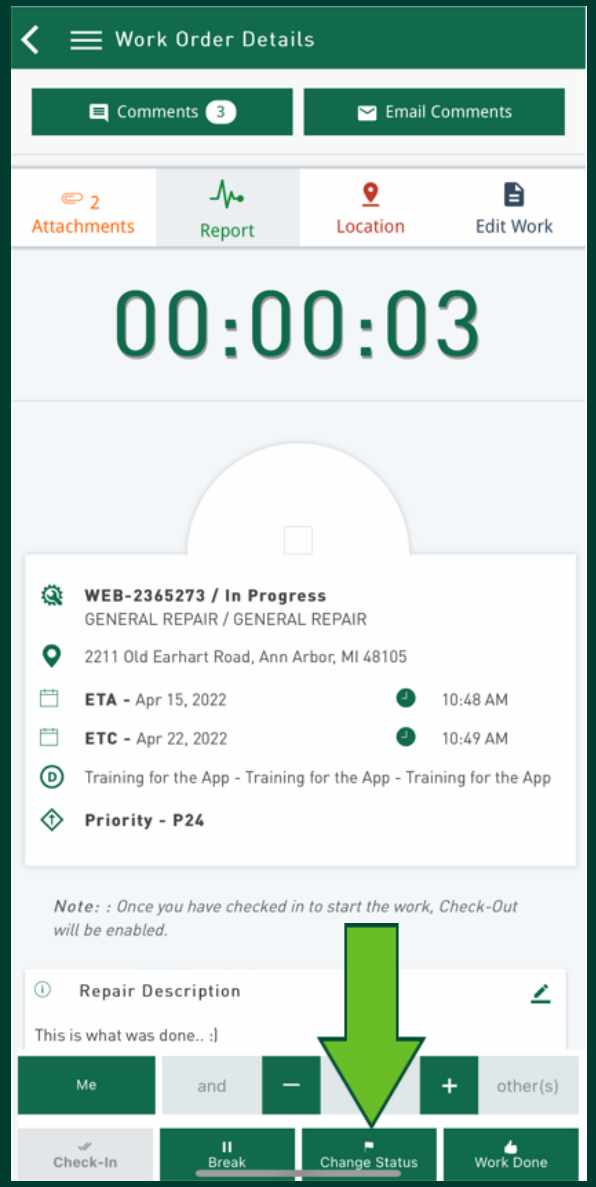
-In Progress/ Follow Up in the case that you are waiting on direction from the client.

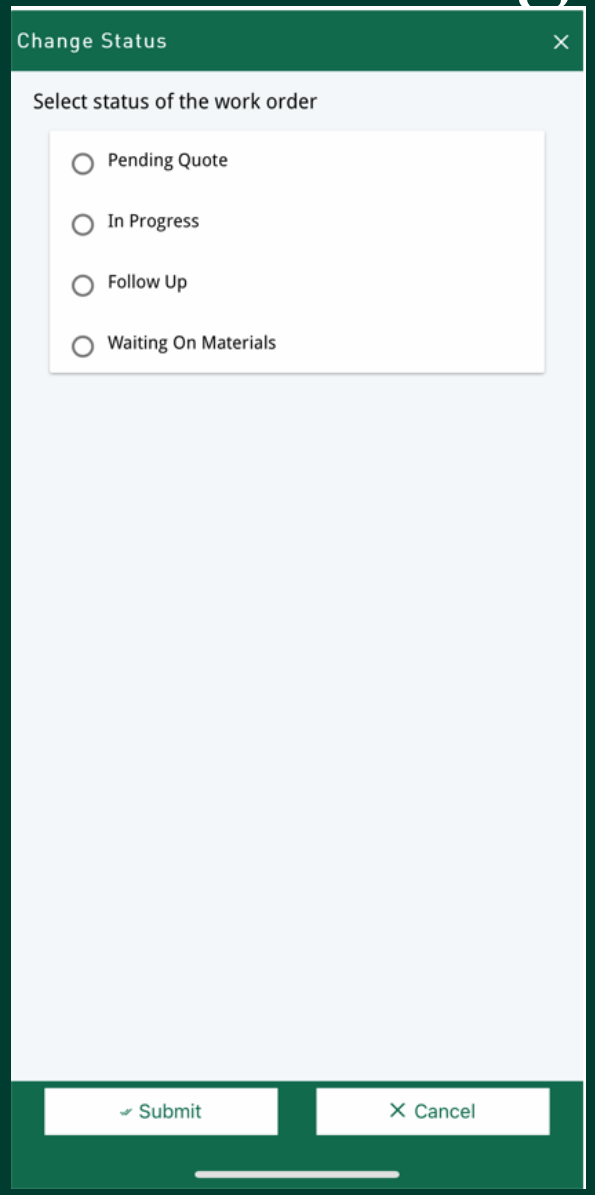
-Waiting on Materials in the case that you need to order materials and will not exceed the DNE.

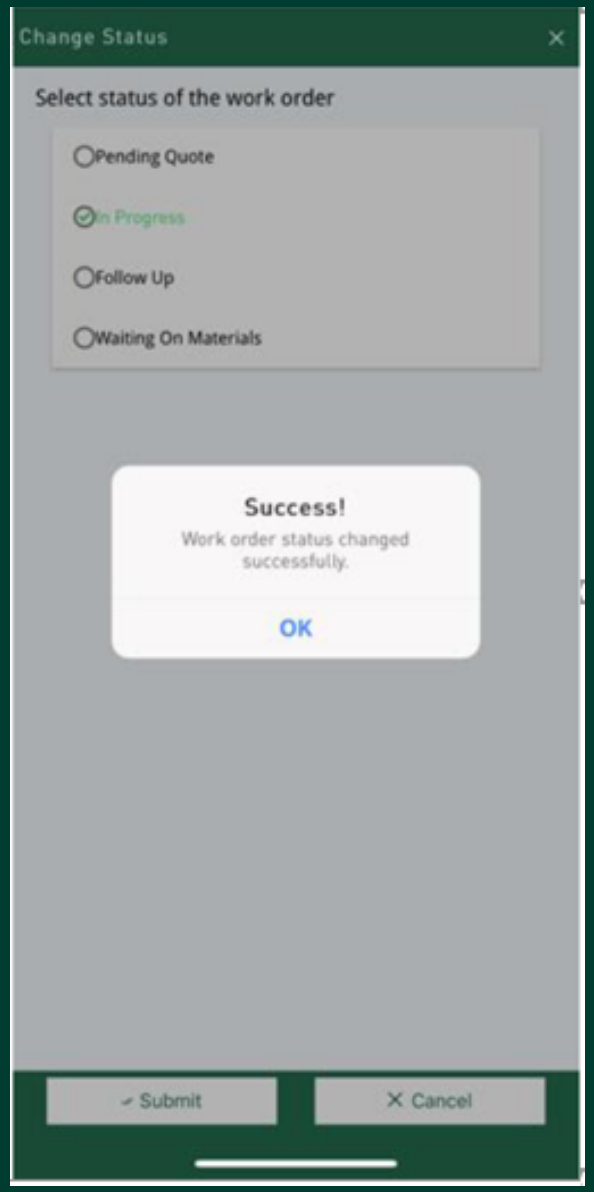
*Please note that changing the status will not prompt you for “after” pictures. *

- Once you see the success popup on your screen, select OK and you will be brought back to the work order overview screen.
- Verify the work order is in the correct status and then you are ready to proceed to your next job.
- Select the back arrow at the top left to go back to the work order list view.
- **REMINDER: Make sure you adjust the number of technicians prior to selecting “Status Change”.**

Work Order Flow: Status Change







Work Order Flow: Completion and Wrap Up (examples on next page)

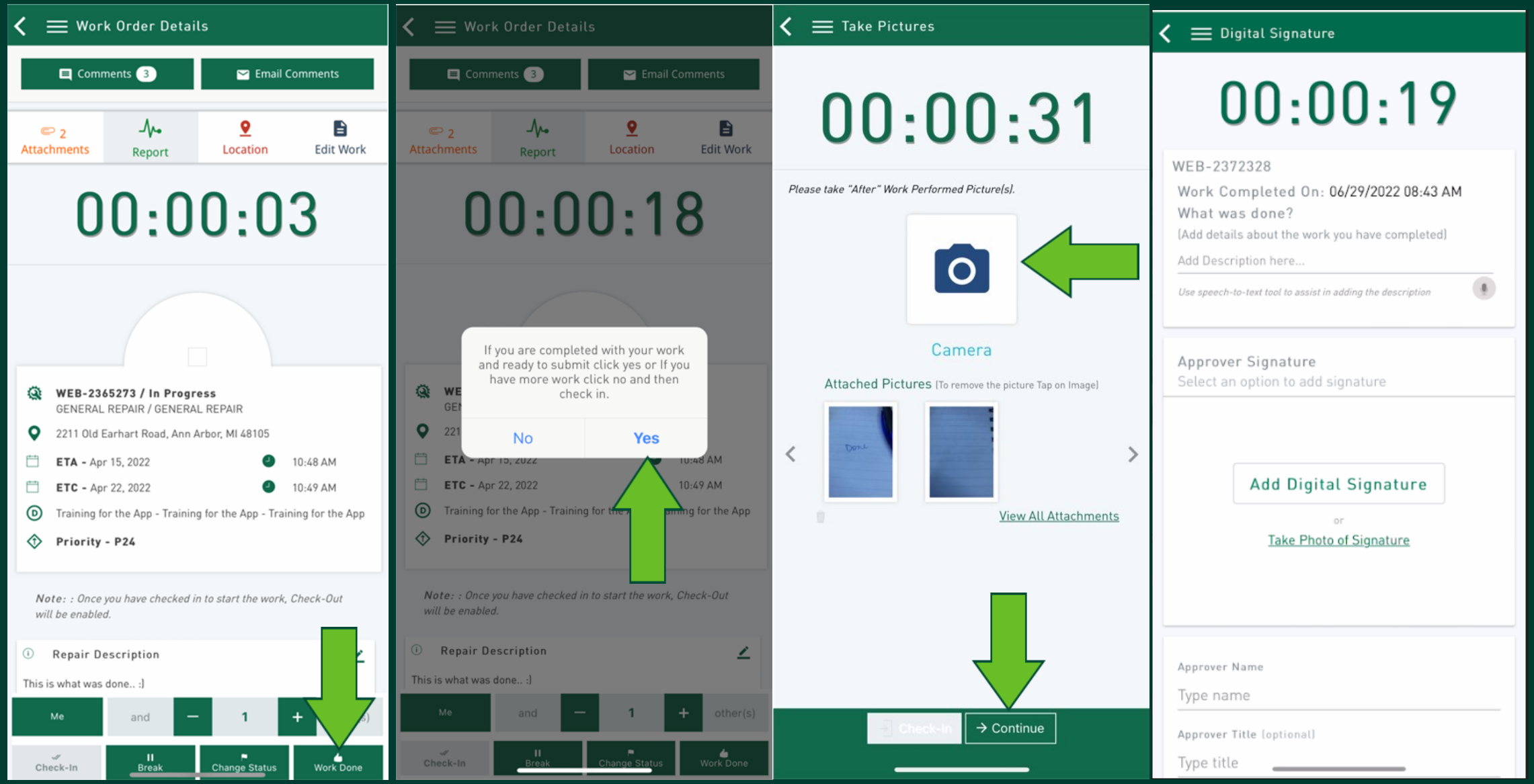
If the job you are on is completely done, you can select “Work Done”.

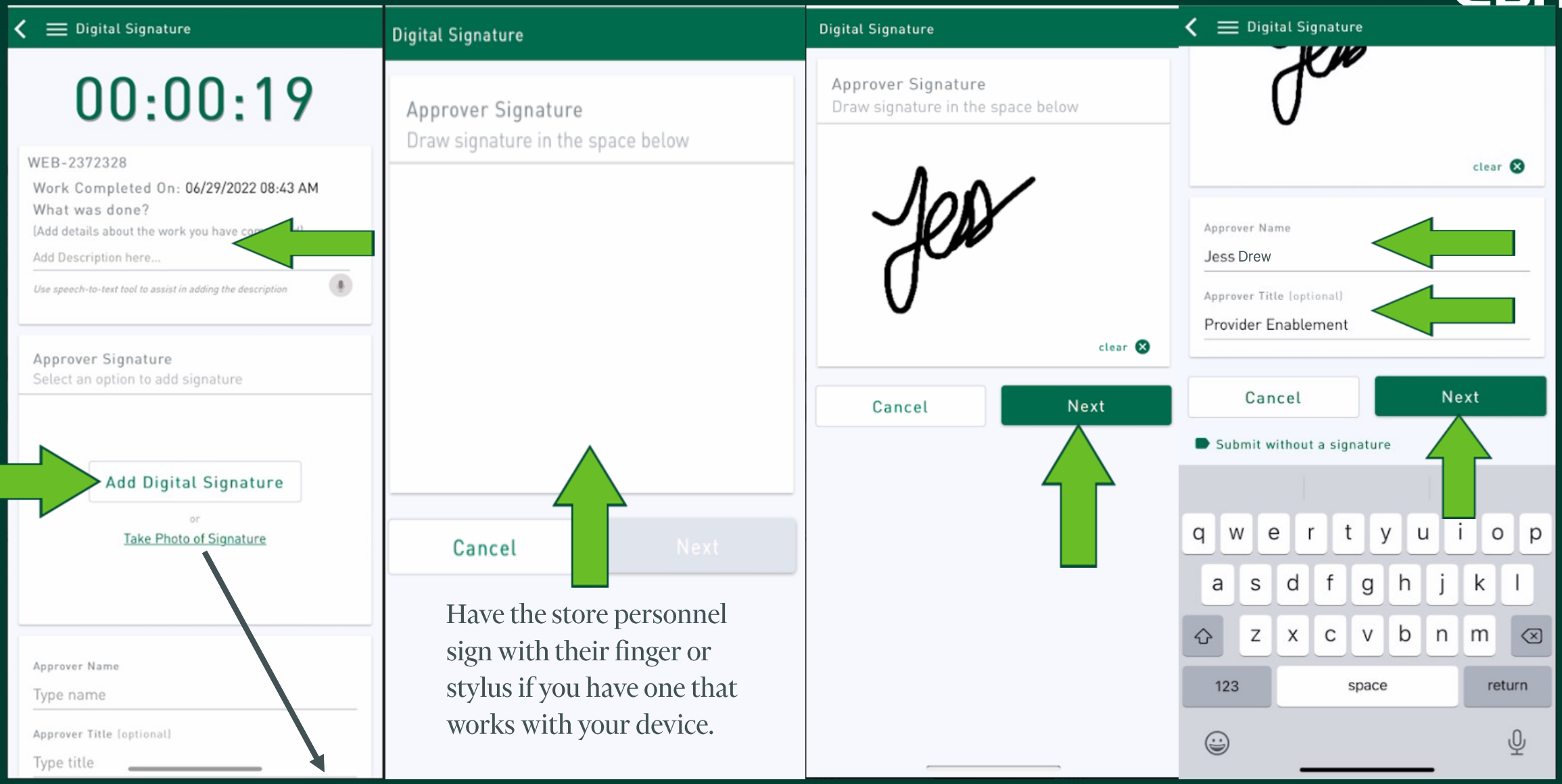
- Once you select “Work Done”, an alert will pop up on the screen and you will select the answer accordingly. If you select “yes”, you will be prompted to take after pictures. Once you are done taking pictures, you can select continue.
- Next, you will be taken to the Digital Signature page. More details on the next slide on the Digital Signature. When you fill in the “What Was Done” section, it should transfer into the next page we go over.

Then you will be brought to a work order completion screen where you can fill in details of the work that was done. On this page, you can add a description of the work done, how much labor was used, as well as any materials that were used. Vendor Roles USER and MOBILE ONLY (as gone over in fmPilot2 training) are not required to fill in this page, it is optional. If they wish to fill it out, once it is filled out they can hit “save and submit”. If they do not wish to fill it out, they can skip to the bottom and select “save and submit”. There will be a separate slide for ADMIN options we will go over.

Once “Save and Submit” is selected, another pop up will appear and again select the answer accordingly. **REMINDER: Make sure you adjust the number of technicians prior to selecting “Status Change”.**

Completion and Wrap Up Flow





Have the store personnel sign with their finger or stylus if you have one that works with your device.

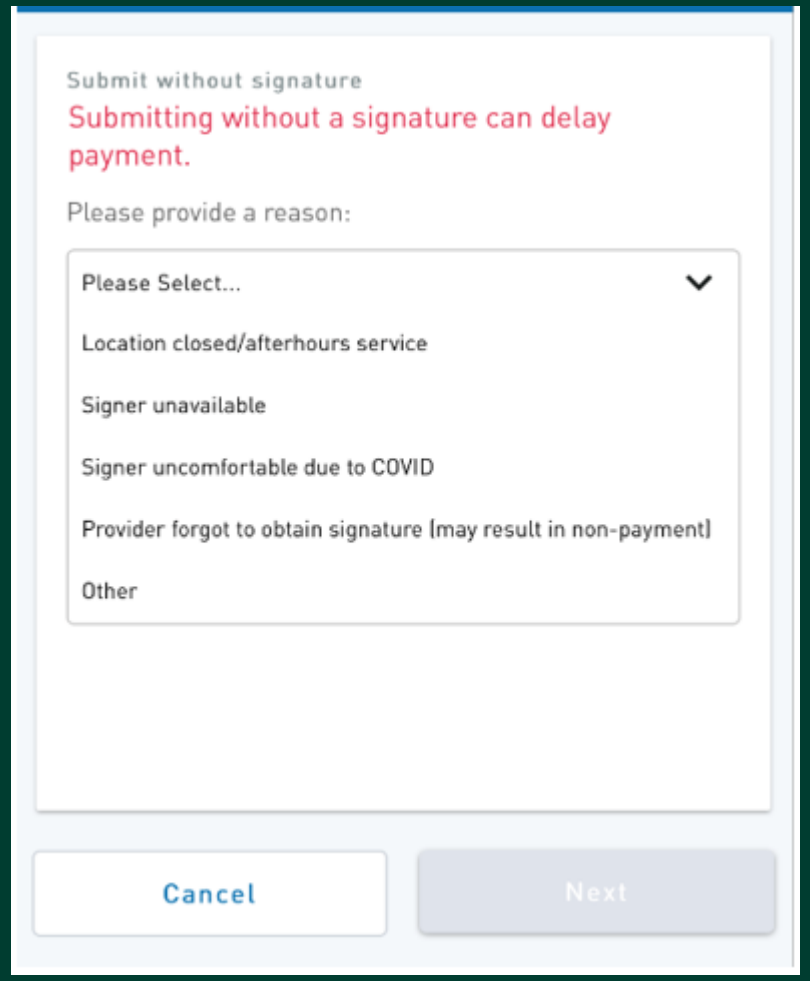
If you are using Take Photo of Signature, you will be prompted to take a photo, just like when you check in.

Submit Without A Signature

If you choose to submit without a signature, the app will prompt you to provide a reason why you are not obtaining a signature.

A signature is required by most clients in some form and if a signature is not obtained, this can result in a delay in payment. A signature confirms you were on site, as well as a check in/out on the app.

If your client does not have the digital signature turned on, you can obtain the signature the way you usually do.
As stated before, it will be the client's choice to turn this feature on.

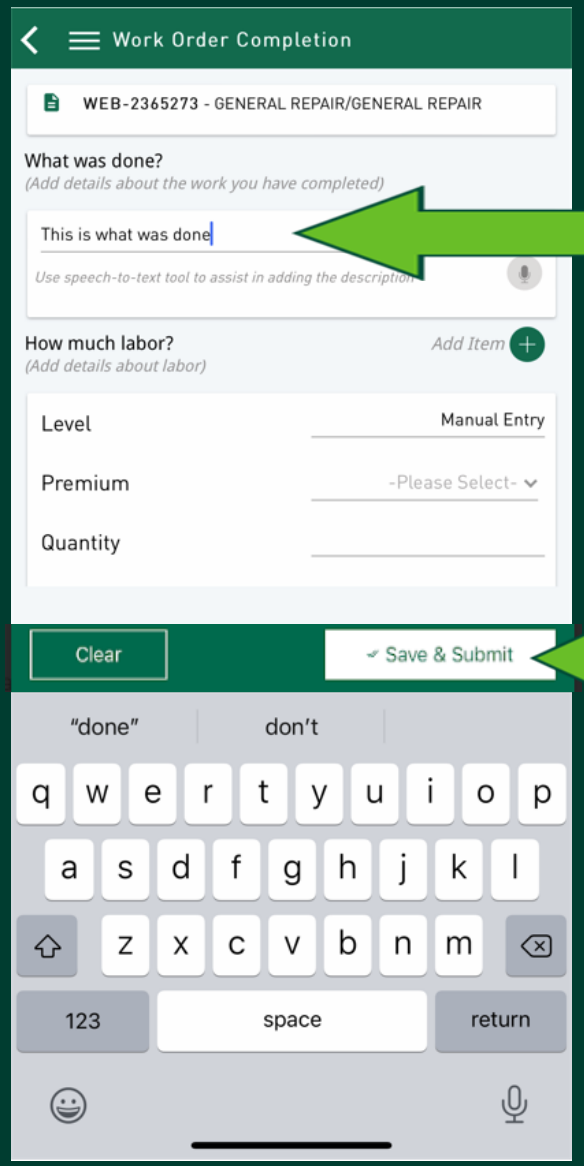


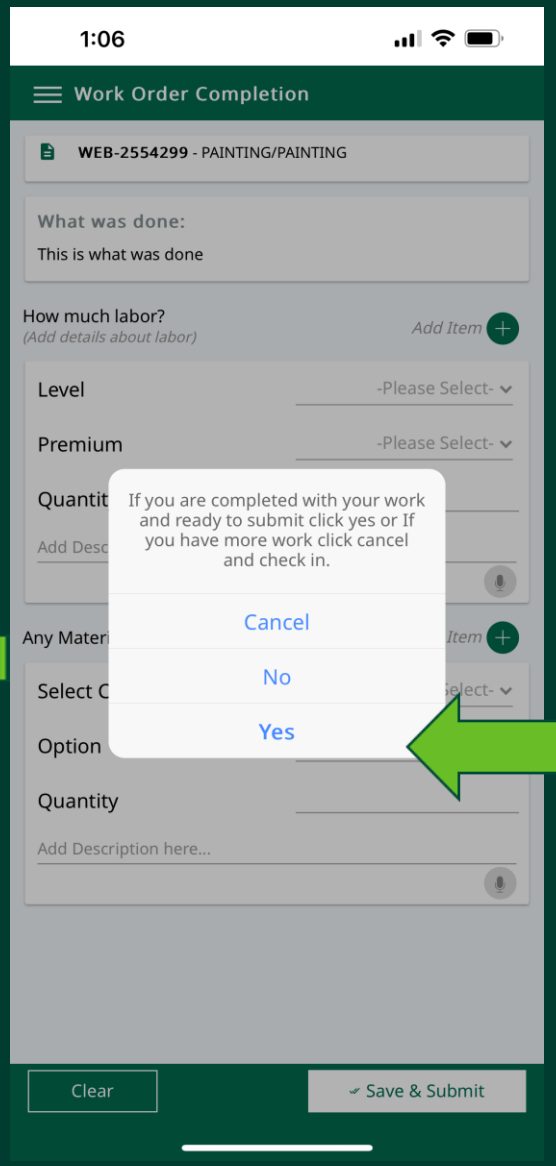
Completion and Wrap Up

User/Mobile Roles

Option 1:
Your "what was done" should transfer from your digital signature page. Ensure that it is there and then just hit save and submit.

REMINDER: Any information put into this page will transfer into your invoice into fmPilot2, BUT you still must submit your invoice online.

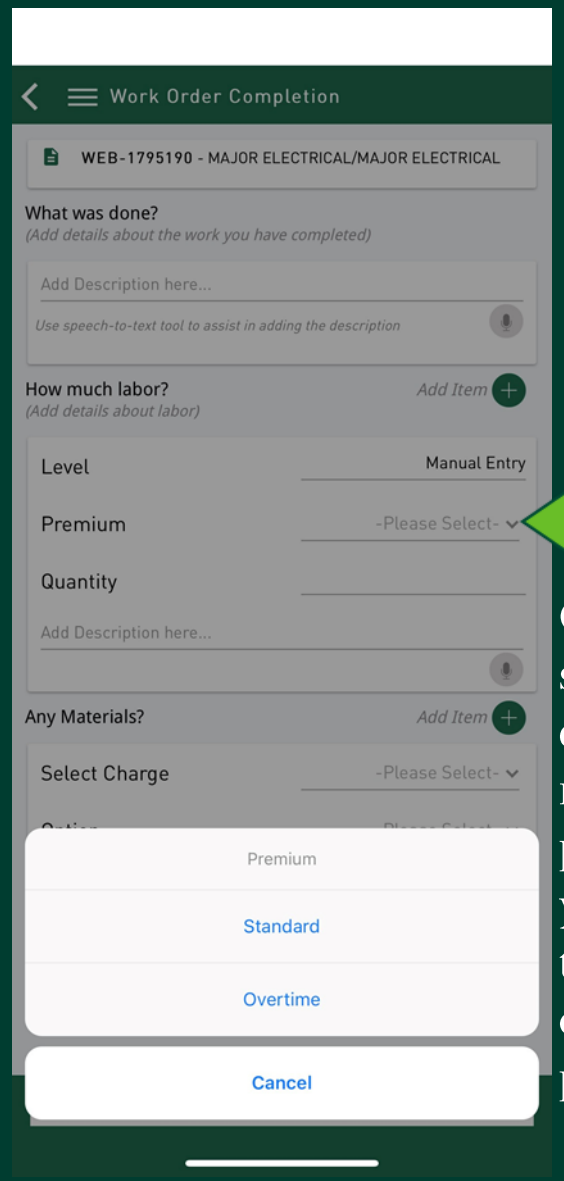




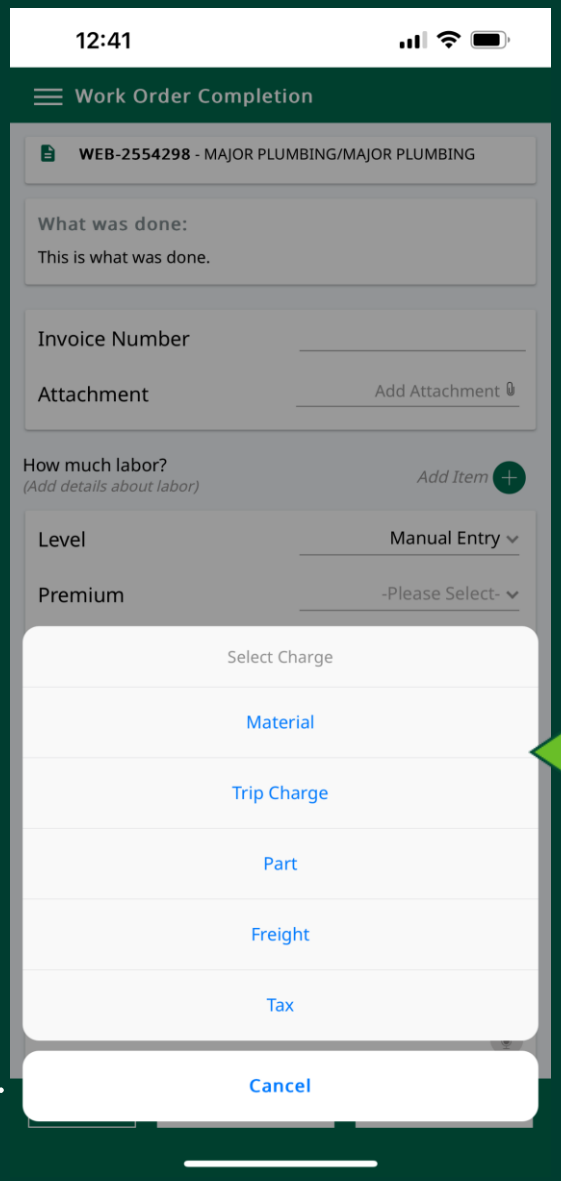
Completion and Wrap Up

User/Mobile Roles

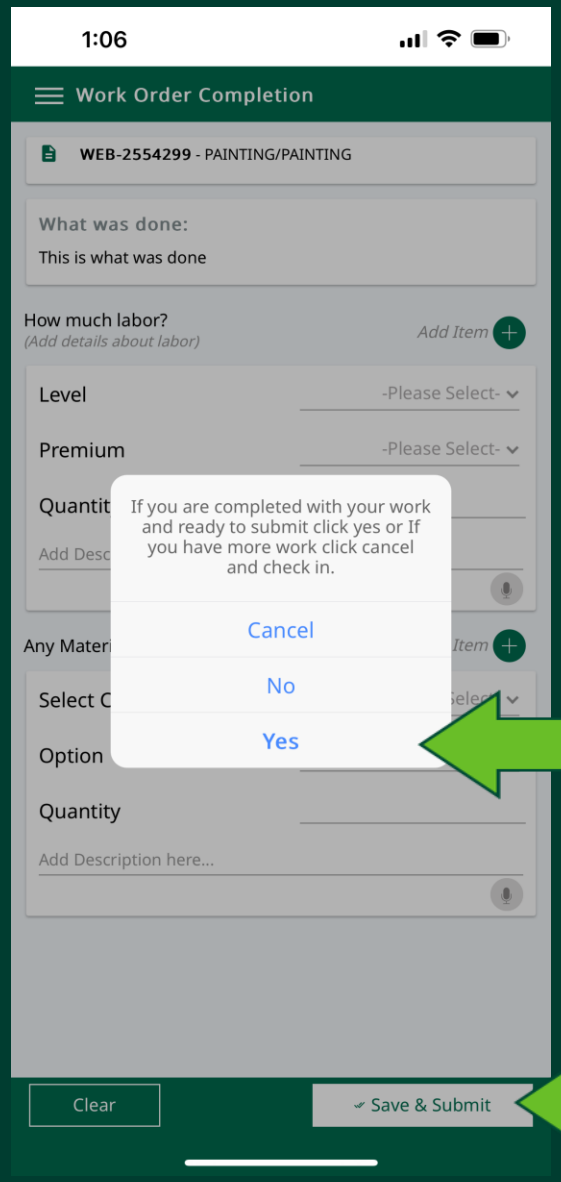
Option 2: you can fill out each field which does load into your invoice section in fmPilot2, but this does not submit an invoice as mentioned before.



Once you select the drop down next to premium for your labor, the options will pop up below.



Materials also has a drop down.



Completion and Wrap Up

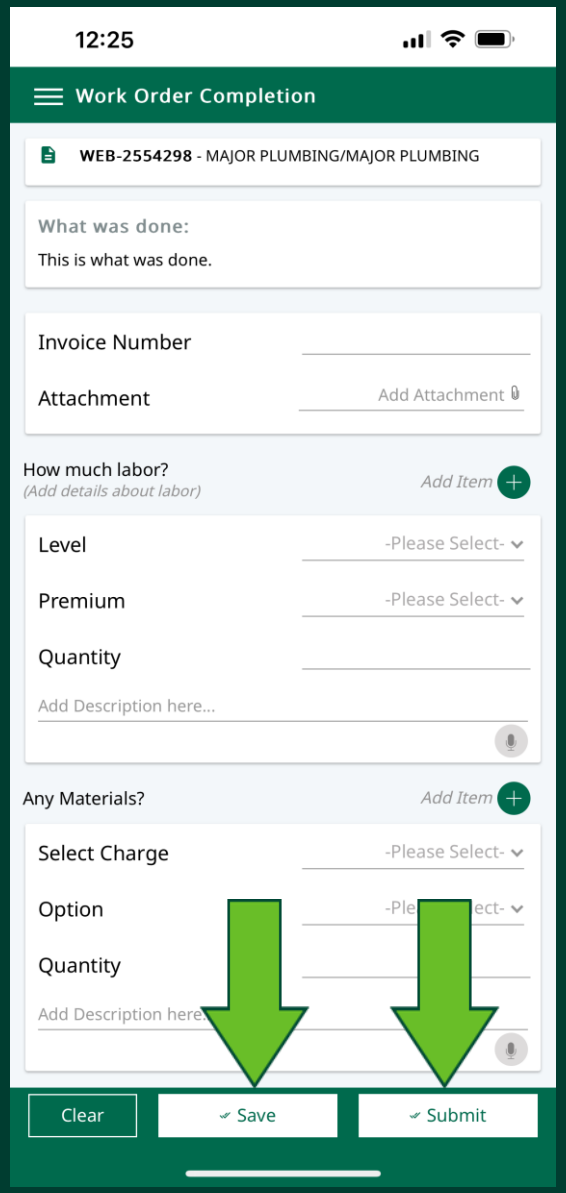
ADMIN Role

The Admin role in the app does have some additional options. On the work order completion screen, the Save and Submit buttons are separated. An ADMIN can either:

a. Skip entering the details of the invoice by selecting "Save". This will move the work order into Pending Vendor Invoice in fmPilot2 so details can then be entered there.

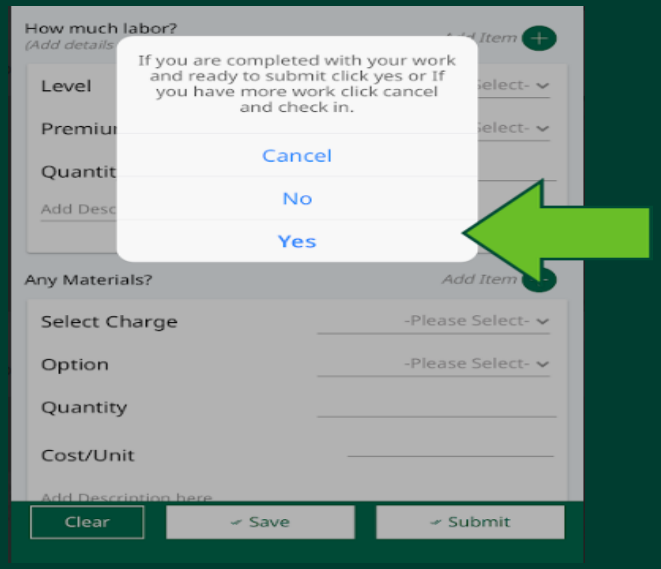
OR

b. Enter the details of your invoice. Once done, you can select "Submit". IF YOU SUBMIT details on your invoice, this submits the invoice in fmPilot2 as well.



If you start to fill out the details and decide not to continue, you can select the "Clear" button and then "Save" and it will follow the "a" option.

If you just select "Submit", the app will give an error and ask you for an invoice number. From there, go back to "a" or "b" previously listed.

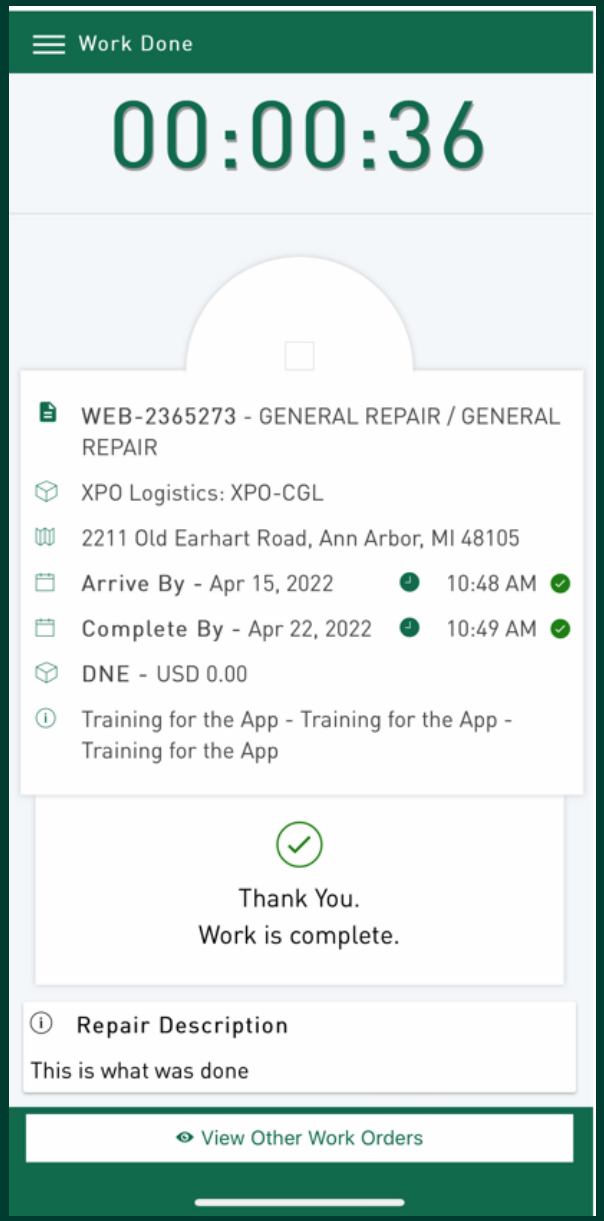


Work Order Flow: Final Steps

Once you “Save and Submit” on the work order completion screen and put in your digital signature from the client, you will be taken back to the “Work Order Details” screen. You can then confirm the work order is complete. The screen shots on this page shows a completed work order.

- You can select “View Other Work Orders” to go back to your work order list.

- As a reminder, work orders are geofenced so the next work order will not appear unless you are within one mile of the job site.



Questions?

Systems Training and Support:

Contact Provider Enablement by sending an email to ProviderEnablement@cbre.com or calling 800-652-2056 Option #1.