



mpengo Service Call Plus: A Quick-Start Guide

Welcome to Service Call Plus! You'll enjoy using the app to replace all the paper documents that you used to fill out in the field. We strongly suggest that you just play around with the sample call delivered with the app, tapping all over the screen, and trying out features. When you are ready to go (after having adjusted your Settings), just tap **New Call** to start your first Service Call / Work Order.

For those of you who have or have previously used Service Call for iPad, this app is functionally identical, with a few new features, including a full Receivables module, cleaner screens, and syncing/interface to Dispatch Board now automatically handled via cloud transfers. Best of all, it fits in your hand on the same device you use all day, every day!

Service Call Plus replicates a typical work order form or call sheet, and lets you indicate the service request, work performed, charges for time and materials used. You can also calculate the taxes and final invoice, get customer signature of the job done, and receive and acknowledge payment. Various reports let you produce invoice registers, invoice copies, timesheets, open calls, and truck re-stocking suggestions. AND, there's also a tool to integrate with our web-based Dispatch Board so your office can send and update new calls to your iPad automatically.

Support:

We're here to help any time you need us. We're consistently rated among the top support organizations in North America and if you ask us a question, you'll find out why. You can expect a quick reply.

To reach us, simply tap the button labeled **[Support]** at the top of the main Open Calls screen. Enter your subject & question, tap **[Send]**, and our Support people will answer you quickly.

App Buttons:

Generally, the app uses the following conventions:

[Home] icon – takes you back to the 'Open Calls' screen

[Back] - returns to the previous screen or menu, and does not save any data entered.

[Done] – saves your work and returns you to the previous screen.

[+] icon – tap to add a new record, line, or other piece of information

[Trashcan] icon – tap to delete a record.

[Envelope] icon – tap to Email.

[Printer] icon – tap for a hardcopy to an **AirPrint** compatible printer

Main (Home) Screen – Open Calls

The 'Home' icon always returns you to the 'Open Calls' screen

Tap Support to send a Question to our fantastic support folks!

Tap to start a New Call

CALL LIST: Tap the Call you want to work on

List is Organized by: EARLIER, TODAY, REST OF WEEK, NEXT WK & BEYOND

Then, color coded according to status: (eg. Waiting Parts is 'gold')

Manage your Customers here

A variety of reports to view, email, or print

Customize 'Plus' to best work for you

Your Pricing/ Rates Table

Tools to create a Dispatch Board, Sync data between devices, Backup, Restore, Import/ Export data

A full featured Receivables module with extra billing, payments, credit card processing, inquiries, reports, and statements

Tap to Learn More, Signup, or edit your subscription

ServiceCall Plus 1.0.15 Support

Open Calls

NEW CALL

Call/ Date	Customer/ Service Request	Status/ When
EARLIER		
02019 Thu Apr08	Diane Sunstrum Sudden backup in both	OPEN ASAP
02020 Tue May11	Linda Winter Homeowner	OPEN 10am
02030 Wed May12	Margot Hemingway Homeowner found leak inside	OPEN Asap

Customers

Rates

Reports

Toolkit

Settings

Receivables

You have 28 days remaining to enjoy the extra Subscriber features. Tap to learn more & subscribe

Call Info Screen - Details

mpengo ServiceCall 1.0.13 Support

02019

Date: Apr 08 2021
OPEN

Tech: Joe Martinez
CHARGEABLE

Customer Info:
Diane Sunstrum
Phone: (480) 555-1212
Contact:

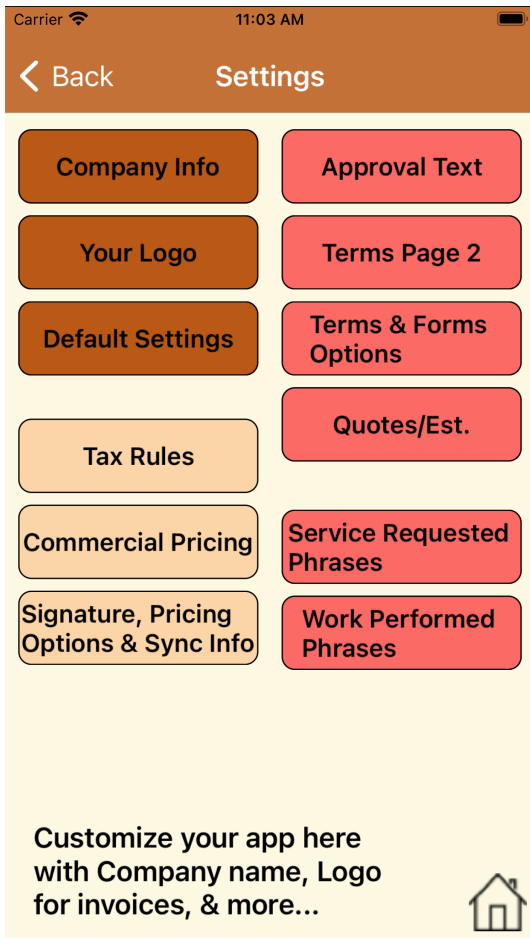
Service Requested:
Sudden backup in both bathrooms. Leaking from under toilets.

CHARGES:
1.00 Pipe Repair- install approx 49
1.00 Sewer Camera
1.00 Infrared Imaging
1.00 Emergency Call

Buttons:
 Work Performed
 Signature
 Disc't & Pymt
 Print/Email Call
 Invoice Sum'y
 Close Call

Annotations:
 - **Return to Open Calls Screen:** Home icon
 - **Job Photos:** Camera icon (You can take up to 6)
 - **Basic Call Info:** Date, Location, Tech, Call Status, Call Type
 - **Tap to review/edit Customer info, Map, Customer History, Equipment installed:** Points to Customer Info field
 - **Tap to enter Service Requested:** Points to Service Requested field
 - **Tap to record Charges:** scroll to bottom for Total Charges (Points to CHARGES field)
 - **Record Work Performed, Date Completed, Tech Signature. Enter Times In/Out, Update Customer Equipment:** Points to Work Performed button
 - **Have the Customer sign off on the work:** Points to Signature button
 - **View / Print / Email Invoice:** Points to Print/Email Call button
 - **Declare Call as closed:** Points to Close Call button
 - **Give a Customer Discount; take Payment:** Points to Disc't & Pymt button
 - **Review Invoice totals; change tax rules if necessary:** Points to Invoice Sum'y button

Settings – General Description



Company Info – name, address, etc

Your Logo – logo for your invoice

Default Settings – Call# range, tech name, colors, standard questions

Tax Rules – tax names & rates

Commercial Pricing – special rules for certain types of businesses

Signature, Syncing – signature, rules if you have multiple techs syncing to a home office

Approval Text / Terms Pg2 – standard terms to put on your invoice, & an optional page 2

Terms & Forms – terminology, names of your rate/price categories, what to show on invoice

Quote/Estimate Options – how much detail, quote style, terms & conditions

Service Requested, Work Performed Phrases

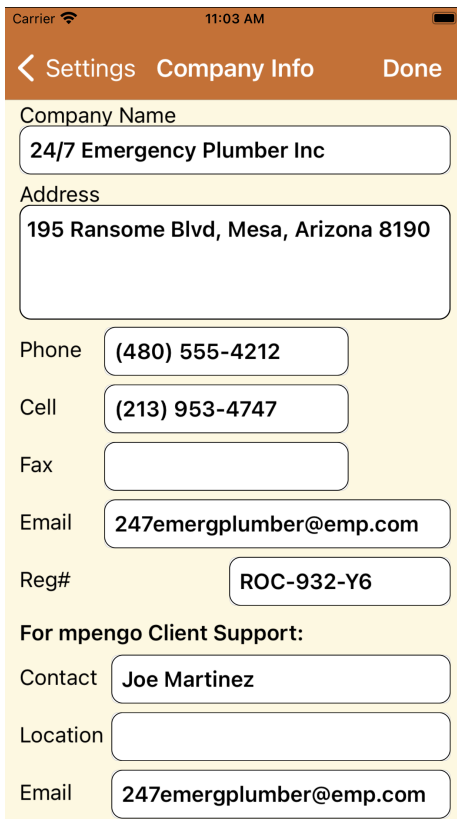
- save yourself typing very common phrases

A word about the App - Free versus Subscription:

When you first install the Service Call Plus app, you have a FREE unlimited version for 30 days, then can decide to continue with a free (limited) version, or upgrade with Apple's In-App Subscription to keep all the extra features. (the extra features are generally shown in **Yellow** throughout the app)

To get a list of the extra features a subscription gives you, go to:

<https://mpengo.com/mpengo-service-call-plus/>



Carrier 11:03 AM

< Settings Company Info Done

Company Name
24/7 Emergency Plumber Inc

Address
195 Ransome Blvd, Mesa, Arizona 8190

Phone (480) 555-4212

Cell (213) 953-4747

Fax

Email 247emergplumber@emp.com

Reg# ROC-932-Y6

For mpengo Client Support:

Contact Joe Martinez

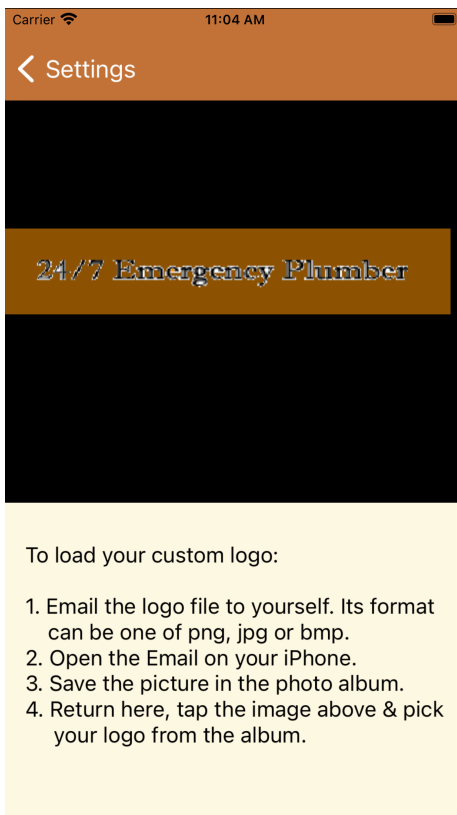
Location

Email 247emergplumber@emp.com

This screen is to setup the background information of your company.

Company & Support Info: Enter your company name, address, and contact info to put on the call sheet, including your license or registration number (this description can be changed in Terms & Form Options).

For mpengo support, enter your contact name, email and general location (e.g. West Coast) so that we are able to help you if you have a support question. When you contact us, we'll also add you to the notification list for future updates and tips. We'll never share your address with anyone.



Carrier 11:04 AM

< Settings

24/7 Emergency Plumber

To load your custom logo:

1. Email the logo file to yourself. Its format can be one of png, jpg or bmp.
2. Open the Email on your iPhone.
3. Save the picture in the photo album.
4. Return here, tap the image above & pick your logo from the album.

Company Logo: will let you attach an image to the top of your invoice. Just follow the instructions.

Test a few times to make sure you're happy with the result; sometimes, you'll need to take a copy of your original image and crop or resize it a bit for a better look.

Carrier 11:05 AM

< Back Setting Defaults Done

ServiceCall #Range (5 digits)

From To

IMPORTANT! If you have several devices & plan on 'syncing', use DIFFERENT ranges for EACH device!

[Optional] put this 'prefix' on each call#

(Helps separate calls by Tech - eg., If RL, then a call# would be RL-01001)

Name of Tech

'Print Call' Color: ☐ Brown ☐ Grey ☐ Blue

Questions to ask about Items that were serviced (for better call history)

Service Call Range: if you have more than one iPad using Service Call Plus, you should establish a call number series (e.g. 10001-39999, 40000-69999 etc.) for each device to better help identify calls back at Home Office, and to avoid conflict when data from several techs are merged onto another device.

Optional Prefix: helps segregate between different techs with a prefix such as TJ for TJ Dawe or RL for Rob Little. The numbers would then appear as TJ-01002 or RL-04005.

Name of Tech: To make it faster to create a new call, enter the person that uses this iPhone (you?).

'Print Call' Color: choose a color for your service invoice format.

Questions to ask about items that were serviced: Allows you to update information on the equipment being serviced for warranty and customer records. The questions here can be changed to better suit your needs.

Carrier 11:05 AM

< Settings Tax Rules Done

	Description	Tax Percent
Tax 1	<input type="text" value="Tax1"/>	<input type="text" value="0.00"/>
Tax 2	<input type="text" value="Tax2"/>	<input type="text" value="0.00"/>

Tax 2 is calculated on
Goods PLUS Tax 1 ☐

Tax Registration
Number

TAX TIPS:

- USA: Tax 1, use composite rate if applic.
Tax 2, is usually blank
- U.K., E.U.: Tax 1, VAT; Tax 2, usually blank
- Canada: Tax 1, HST/GST
Tax 2, PST if applic.
PEI, turn ON Tax 2 switch

Insert the rate you use most. If you bill from different localities, you can adjust rates during billing (inside Invoice Summary)

Description: For example, if you are in the UK, set the description of Tax 1 to VAT and the tax percentage to the appropriate value. Or, if you are in a state that has State as well as County taxes, you can set both taxes: Tax1 might be 'State Tax' and Tax2 'County Tax'

Tax 2 is calculated on Goods plus Tax 1:
Turn switch **ON** if your region requires it.

Note: You can override the Default Tax Rules for a call by tapping **Invoice Sum'y** in the call. Then tap '**Special Tax Rate**' and follow the instructions.

Registration Number: You can enter your Tax number or Registration number, which will appear on the Service Call invoices (The number will show only when the call is emailed or printed)

< Back Commercial Pricing Done

General Pricing:

ServiceCall uses 'Rate/Unit Price' in your Rate table. ☐

Turn ON this switch to use Unit Cost, Markup% & calc new price (if 0 unit cost, we use current price)

Markup %

Commercial Overhead and Profit:

Billing: Overhead %

Billing: Profit/Markup %

Also calculate Profit% on Labor ☐

If you charge time & materials on set rates, leave these fields 0.00

Some folks bill commercial customers by adding a factor for O/H & profit: eg. add a 5% charge to cover O/H and 8% for profit.

If you have mixed commercial / residential, but only some are billed this way, leave as 0.00, & put rules in each Customer table

General Pricing: Service Call Plus uses 'Rate/Unit Price' in your Rate Table for pricing.

Turn **ON** the switch to instead use Unit Cost & Markup % to calculate a rate/price (if unit cost is 0.00, Plus uses existing price).

Commercial Overhead & Profit: some service firms who specialize exclusively on commercial contracts sometimes establish pre-set rates as an agreed upon markup/profit percentage. Overhead fee is calculated on all items including labor. Profit will NOT charge on Labor (items in Labor Category) unless the flag is turned on.

< Back Sig., Pricing, Sync Done

Customer Signature is mandatory ☐

It may be usual that the customer is not present to sign off on your Service Call. If this applies to you, you can make Signature optional.

Syncing:
 Syncing is managed in the mpengo CloudServer. Besides Customers & Rate tables, how much Call History do you want transferred each time you 'sync' ?

Last 30 Days ☒ All Call History

Pricing Method:
 I price my calls back at the office ☐

Some businesses do not price their calls in the field, but send (Sync) them up to the office iPad for pricing & invoicing.

GENERAL:

a) Name each device with Tech name, and call the office iPad (eg) 'OFFICE'

b) Establish separate Service Call number ranges for each device

c) Try using the 'prefix' feature: 'O'-Office,

Signature: turn ON the switch to require signature before closing a call

Syncing: If your business has multiple techs in the field, you have the ability to send up ('sync') your completed calls up to a Home Office device (usually an iPad Pro with lots of memory, or similar).

There's 2 sending mechanisms:

- The first involves the tech periodically going to the Toolkit menu (daily?) and tapping 'Synchronize Devices'. The app then packages up all recently completed calls, and send them to Home Office via an email message where it is picked up and automatically merged to Home Office
- The second involves an automatic process where a completed call is automatically sent up to the Home Office via a 'cloud transfer': no action is required on your part (**note:** at the time of writing, cloud transfer was still being finalized..)

Pricing: This lends us a new option - some businesses do not price their calls in the field, but send (Sync) them up to the office iPad for pricing and invoicing.

Here's a bit more discussion on how Syncing & Pricing work:

- **Tech (Field) units** get their calls priced at 0.00 when the flag is turned **ON** for 'I price my calls back at the Office'
- When the tech closes the call, it is tagged as 'transferred'.
- The tech periodically syncs the completed calls up to the **Office iPad** via Toolkit/Synchronize (the Office device has their flag turned **ON** for 'I price my calls back at the Office', and a new question 'I'm the Office').
- When the Office merges the calls, the transferred calls are reset as regular 'open' calls
- The Office now has the option to correct the pricing all at once, or fix each item manually.
- Office completes the pricing, prints or emails the invoices and closes them in the regular way.
- Later, the office can sync the calls back to the field, and the field units (which had the invoices as all 0.00, saying transferred), now get their call history records replaced and the status changed to closed. The Invoice will still show zeroes for prices on the Tech's iPad.

TIP: in 'office pricing', once the information is synced to the Office iPad, all of the main reports (e.g. Invoice Register/Invoice Copies, Business summary, Timesheet summary) would be best printed on the Office iPad. The Suggested Parts Stocking report will always be a list of companywide parts used.

< Settings Approval Text Done

Approval text in signature area

I have the authority to order the work as outlined above. It is agreed that the seller will retain title to any equipment or material that may be furnished until final payment is made, and if settlement is not made as agreed, the seller shall have the right to remove same and the seller will be held harmless for any damages resulting from the removal thereof.

'Thank you' text in payment area

Payment Is due upon receipt.
Thank you for the opportunity and we appreciate your business!

You can customize the phrases on your form to match your company policies and practices.

Approval Text and Terms Page 2: This screen (& a similar Page 2) comes preset with default descriptions that can be tailored to suit your company requirements.

Terms Page 2: The second page sometimes is used for a more detailed disclaimer, and does print/display on a second page/screen

< Settings Terms & Forms Done

(eg) 'License' or 'Reg.#'

(eg) 'Service Call #'

Price/Rate Categories	Short Form
<input type="text" value="Materials"/>	<input type="text" value="Matl"/>
<input type="text" value="Labor"/>	<input type="text" value="Lab"/>
<input type="text" value="Consumables"/>	<input type="text" value="Consum"/>
<input type="text" value="Travel"/>	<input type="text" value="Trav"/>
<input type="text" value="Convenience Fee"/>	<input type="text" value="CF"/>

Print times in/out on SvcCall ☒

Print customer signature on SvcCall ☒

Print rate codes on SvcCall ☒

When emailing a SvcCall, send a cc to:

License or Reg #: Option to change the wording of 'License'

Service Call #: Option to change the wording for 'Service Call #'

Price/Rate Categories and Short Form: allows you to change the names of the 5 Price/Rate Categories.

SvcCall Form Options: choose whether or not you want to have times in/out, customer signature or rate price codes shown on your invoice.

When emailing a SvcCall, always send a cc to: if desired, enter an email address to be cc'd on every call emailed.

< Back Quote/Est Options Done

How much Detail do we put on the quote/e...

☒ Full Detail ☐ Categ. totals ☐ One Value

Quote/Est Style: ☒ Quote/Est ☐ Invoice

Quote/Est - in the style of a letter
Invoice - similar to ServiceCall Invoice

Text to put in Quote/Est Approval

Special Terms & Conditions

Quote/Est. Options: When you set your Type of Call to 'Quote Only' or "Estimate Only" you have the following options:

Charge Details: Select 'Show Details', 'Totals Only' (by category) or 'One Value'

Text on Quote/Est. Approval (signature area): If you wish to enter different Approval text for your Quote, tap and enter your text.

Special Terms & Conditions: enter any Terms and Conditions you want to appear on the Quote/Est

Quote/Est. Style: Select the type of layout:

- 'Quotation' is a letter style quotation
- 'Invoice' looks similar to an invoice

Serviced Requested / Work Performed:[illegible]

Back

Work Performed

+

Search

Electrical Fault – Wire or Wiring System

Extra outlet installed

Mechanical Fault – Crack, Worn Part, Wear

Re-charged A/C

Re-set Furnace

Removed computer virus

Restriction Fault – Fuel. Drain, Piping or Air

Snaked obstruction from pipes

Use these tables to setup phrases that you repeat quite often in order to save you time in the field. Then, when performing your call, there's a search icon that you can tap to insert these phrases

Setting up Customers: Tap Customers to setup or edit your Customer list.

Carrier 11:06 AM

< Back Customers +

Q Diane

Diane Angels (833) 533-8483
24021 Genova St, Brittany Diane

Diane Sunstrum (480) 555-1212
450 W 2nd Ave, Mesa,

Alan Thompson 804 555-7622
2832 Tacoma Trail, Diane

Home icon

Carrier 11:08 AM

< Back Customer Info Done

First Name Last Name
Diane Sunstrum A/R Inquiry

Company Name

Address (Service Location)
450 W 2nd Ave, Mesa, AZ 85790

Phone Number(s) Contact Info
(480) 555-1212

Location

Email diane_sunstrum@gmail.com

Cust Notes Equip Installed Other Addr's Special Fees

Call Hist (0) Map Home icon

When creating a new customer, tap [+]: you can then optionally tap **Contact** to bring in someone from your iPhone contacts or create a new one here.

You can also declare that customer tax exempt, add Overhead/Profit%'s (both in Special Fees), add Customer Notes, and view previous **Call History**.

- if you've chosen to use 'Markup %' in Settings the Special Fees button shows 'Cost Markup% (if different)'.

You can also create your Customer list on your PC in an Excel spreadsheet and import it into Service Call: tap the Toolkit button / Import Tables for instructions

Note: You certainly will have 2 types of customers: businesses & homeowners. If your customer record does not have a company name but just has a first and last name, these get placed alphabetically at the top of the list. Customers with a company name will be sorted separately and follow. If you have a company name and also have a name, both will appear on the service call.

Billing Address: If the Billing Address is different than the Service Location, you can enter the address (Other Addr's): this will then be the address appearing on the invoice

Customer Notes: Tap Cust Notes to access any existing notes. To add a new note, tap +, indicate the date and enter any comments (remember to tap Done to save your notes)

Call History: tap Call Hist to list all closed calls for that customer. Indicate the call desired, and you'll get a summary of the call. Tap Email/Print to see the invoice again. **There's also a **Report** icon on the list to let you produce a report of all or selected calls. This can be viewed, printed or emailed.

Reopen a Closed Call: To reopen a Closed Call, select the call and tap Re-Open Call: when a call is re-opened it is opened using the original date of the call.

Resend CLOSE to Dispatch: If you're using Dispatch, and the selected call was originally a dispatched call you have an option to resend the 'close', if for any reason the closed dispatched call did not reach the Board to update its status.

Rates/Prices

Carrier 1:19 PM

< Back Rate/Price Table +

Q Search

Matl Choose Category Trav

Lab Consum Misc

ECONOFLUSH	Econo Flush Toilet
ELECOMMHEA	A.O Smith 120 Gal
FLOORSTRAINE	Commercial Floor Strainer
HP SW	Heat Pump Switch
INSTANT HOT	Point Of Use Instant Hot
MAIN LINE	Main Line Restoration
MAT235	Materials
MATERIALS	1"Copper Pipe Fittings Brass
MATERIALS	Copper, Pex, ABS, Gas

Home icon

Tap Rates to manage your parts or pricing tables.

The table is divided into 5 categories: Materials or Parts, Labor, Consumables, Travel, & Misc. (the descriptions of these 5 categories can be changed in Settings/Terms & Form Options).

An explanation on how you can create your Rates/Price list on your PC in an Excel spreadsheet and import it into Service Call is located in Toolkit /Import Tables

(Note: if your company doesn't want their techs to produce invoices in the field, but prefer to price them back at the office – see 'syncing and pricing' page 8).

Carrier 1:26 PM

< Back Rates/Prices Done

You are adding/editing an entry in the Materials Category



Rate/Price Code

Description

Rate / Unit Price

This charge is Taxable ☒

Unit Cost

Entering your Rates/Prices:

- Indicate the category and tap **[+]** to add a new code.
- Enter a unique Rate/Price code. The code can be a part number or abbreviation of the description (the parts list gets sorted by the code).
- Enter a description to appear on the invoice
- Enter the selling price (Rate/Unit Price).
- Enter the 'Unit Cost'. If you have 'Markup' turned on in settings and have a unit cost entered for the item the cost will be used to calculate the price to charge (if you're not using the Markup feature – usually the case – this field is optional)
- If the item is taxable turn the taxable switch **ON**.
- Be sure to tap **Done** to save your work.

Carrier 1:31 PM

< Back Reports Done

From Date Sat May 01 2021

To Date Mon May 31 2021

- Invoice Register ✓
- Business Summary
- Timesheet Summary
- Customer List
- Rates/Price List
- List of Open Calls
- List of Quotes/Est.
- Receivable Report

Inv. Register is based on Date:

Opened Completed

RUN THE REPORT

Reports

- Select your Report
- Select the date range
- Tap RUN THE REPORT

If you've selected the **Invoice Register**, you'll have the option at the bottom of the screen to run the report by date '**Opened**' or date '**Completed**'.

(amusing note: the 'open/completed' feature came as a result of the Covid pandemic: with the shutdowns and resulting delays, service calls were being booked weeks in advance, and calls booked in (eg) April weren't getting worked on or completed until May, so it made more business sense to match up the Invoice with the month it was presented to the customer.....)

Photos: You can attach up to 6 photos to your call sheet by tapping the Camera icon at the top of the Call Info screen. Then choose photos to pull from your Photo Album or tap Take a Photo. Enter a caption and/or description for this photo. The Caption appears under the photo in the email and the photos are sorted alphabetically by caption. Description is for your internal use. Any photos taken with the camera in Service Call Plus are NOT stored in your photos app. **Note:** these photos are not sent with the sync file.

Toolkit Menu



Synchronize Devices: If your company has several techs, you may want to sync/share data between them:

- If you've got 2 or 3 techs working together you may just wish to 'sync' between the 2 or 3 of you to ensure that you all have the same customer info, rates/prices, custom notes and call history
- If you've got a larger company, you may want to setup an (eg) iPad Pro with Service Call Plus to act as Home Office, and then have all the techs 'sync' their completed calls back to home/head office where all the data is available for reports, inquiries, call history

It's an easy-to-use mechanism where the app just bundles up the info to sync into an attachment, and emails it to your destination of choice. At the other end, the recipient only has to tap the attachment, indicate that the data is intended for Service Call Plus, and the data automatically is merged (in development right now is an option to have this done automatically via a background 'cloud' transfer)

Dispatch Board: Using any browser, you and your team sign into your mpengo Dispatch Board.

On the Board, view the board, view call history, manage customer info, and post and dispatch calls. When a call is dispatched to you, a special email is automatically sent out to you and the new call (& possible new customer) is inserted into your app when it is active.

Later, when you close out the call, another message is sent from you back to Dispatch to mark the call as closed, containing the call details and invoice.

Have a look in Toolkit/Dispatch Board, and more in <https://mpengo.com/mpengo-dispatch-board/>

Backup/Restore: This allows you to create a backup of your data, which you can also send to your PC for safekeeping.

It works in a manner similar to the 'sync' feature: the app just bundles up all your data into a compressed attachment, and you email it to your PC. At your PC, open the email and save the attachment in a special folder.

No instructions are necessary, and it just takes a minute or so to bundle up the data and prepare the email. Should you ever need to restore and recover your app, you'll just have your PC email the desired file to your iPhone; upon receipt, open the email, tap the attachment and confirm that you want the data replaced with this safety backup..

****REMEMBER: to USE this feature regularly!** Once a week or two, send off a backup to your PC, and store it safely in a separate folder. We've sadly heard of too many instances with users of our iPad version of Service Call who 'just didn't bother' with this simple backup, and later lose, have stolen, or break their device, and now don't have a recourse to recover that invaluable information (Apple backups typically don't backup data in third party products)

Import Tables from your PC: Getting up to speed, loading in your customers and pricing tables is sometimes an onerous job.

This selection tells how you can use a built-in utility that lets you create your customer and rate lists in Excel, and then have them automatically merged into the app.

Exporting: For subscribers (& new 30 day users), there's a utility that takes our best reports and sends them out via email in an Excel-compatible format.

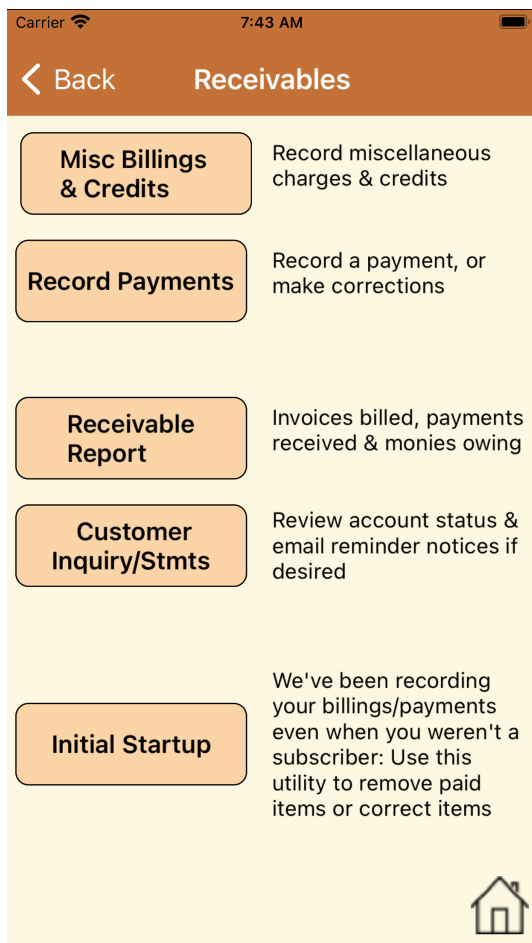
This lets you (eg) send your invoice register to your PC, make a couple quick adjustments in Excel, and post it to one of the popular accounting packages available in the market (although most people will find the built-in **Receivables** module more than capable!)

Select your date range, indicate the report desired, and tap PROCEED. A tab-delimited data file will be created and emailed to the address of your choice

Manage your Subscription: Use this selection to learn more about subscription features, to sign-up, or to make changes to your Apple subscription.

When you initially install Service Call Plus, you're setup with every special feature for a full 30 days to give you a chance to get comfortable with the app. Later, you can then decide to continue with a free (limited) version, or upgrade with Apple's In-App Subscription to keep all the extra features

Receivables Menu



Misc Billings & Credits: Service Call Plus has been posting invoices from the service side as you've been doing the calls, receiving payment (if any), and closing them. This selection lets you record miscellaneous charges or credits. Once recorded, you have the option to add a personal note to the customer, and send to the customer the invoice/credit information, followed by a customer statement

Record Payments: Here, you can record amounts received from customers, apply the payment to the particular invoice(s) and update the customer. If you've signed up with the Credit card folks all of your financial info, you can process credit cards by entering the card number and other info, or by using the Bluetooth CC scanner that the credit card company also offers. (If you haven't signed up, record the info manually, and if a credit card, process that separately as well)

Receivable Report: The receivable report is a 3-in-one report, giving you:

- Billings this period
- Payments & Adjustments received this period
- An Outstanding Receivables report, aged, showing everything

Customer Inquiry/Stmts: Customer inquiry gives you an option to show only outstanding invoices and details – plus everything in the last 30 days, or to show all history. You then can elect to send out a nicely formatted customer statement via email.

Initial Startup: As the menu describes, we've been recording your work in the app even during the brief period when you hadn't yet subscribed. This utility lets you look at each customer account and correct or remove invoices that since were paid outside the system. Once you've got it all into agreement with your manual books, Receivables can now take over!

Processing a Service Call – A quick run-through:

Here's the typical workflow when starting, working on, and completing/invoicing the service call with Plus:

mpengo ServiceCall 1.0.13 Support

Open Calls NEW CALL

Call/Date	Customer/Service Request	Status/When
EARLIER		
02019 Thu Apr08	Diane Sunstrum Sudden backup in both	OPEN ASAP
02020 Tue May11	Linda Winter Homeowner	OPEN 10am
TODAY		
02030 Wed May12	Margot Hemingway Homeowner found leak inside	OPEN Asap

Customers **Rates** **Reports** **Toolkit** **Settings** **Receivables**

You have 28 days remaining to enjoy the extra Subscriber features. Tap to learn more & subscribe

mpengo ServiceCall 1.0.13 Support

02019

Date: Apr 08 2021
OPEN

Tech: Joe Martinez
CHARGEABLE

Diane Sunstrum
Phone: (480) 555-1212
Contact:

Sudden backup in both bathrooms. Leaking from under toilets.

CHARGES:
1.00 Pipe Repair- install approx 49
1.00 Sewer Camera
1.00 Infrared Imaging
1.00 Emergency Call

Work Performed **Signature** **Disc't & Pymt** **Print/Email Call** **Invoice Sum'y** **Close Call**

mpengo ServiceCall 1.0.13 Support

Call Basic Info

Call Date: Thu Apr 08 2021

Service at (Location): Customer Home

Technician: Joe Martinez

Order No. or Name:

How did you hear about us (ads, radio, etc):

Call Status	Type of Call
OPEN <input checked="" type="checkbox"/>	CHARGEABLE <input checked="" type="checkbox"/>
WAITING PARTS	WARRANTY
WAITING CUST	CONTRACT
OTHER	QUOTE ONLY
WAITING PYMT	ESTIMATE ONLY

CANCEL THE CALL

● Start in the Main (Home) screen – Open Calls

Open calls are grouped by Date:

- Earlier
- Today
- Rest of this week
- Next week & beyond

Colors are added to indicate any special status:

- **Purple** (came from Dispatch Board)
- **Red** (Waiting Payment)
- **Orange/Gold** (Waiting Parts)
- **Green** (Waiting Customer)
- **Brown** (Other delays)

● Tap **New Call** to start a new service call. You're immediately taken to the customer list to select the customer. If you need to, you can tap **[+]** to add a customer on the fly.

● You're then looking at the **Call Info** screen where you can tap various regions to add data or get more info. For example, tap the customer area and you can review customer address, look at a **map**, check equipment that was installed, any special notes, and look at **call history** (tap Done to return to Call Info).

● Below the customer info is Service Requested. Tap here to describe the service request and general time requested. You can tap the 'search' icon (magnifying glass) to pull from your list of typical problems

● By tapping the 2 top regions you can add additional info such as service location, technician, order number, how did you find out about us, call status, type of call (or cancel the call).

Quoting (type of call):

When you select '**QUOTE ONLY**' or '**ESTIMATE ONLY**' as the type of call you will have the option to '**COPY A QUOTE**' or '**COPY ESTIMATE**'. If you select this option it will bring up a list of previously closed quotes/estimates for you to select from. Once selected it will copy all the info from the original Quote or Estimate. You can then change the customer or add or remove charges.

This gives you a great way to copy or build a set of standard quotes/estimates! Set yourself up as a customer, create 'fake' service quotes/estimates, save/close them, and later, to create a new quote or estimate – NEW CALL / (you) / type of call – quote / copy a quote / change 'you' to the real customer / make any changes to the quote / send it out!

If this is a '**QUOTE ONLY**' or '**ESTIMATE ONLY**' type of call it is not necessary to enter any work to be performed, tech or signature when closing the call.

* There's a slight difference between 'Quote' and 'Estimate' – 'Estimate' adds an automatic disclaimer saying "*This is a GENERAL ESTIMATE ONLY based on the information we have so far*" (in other words, don't hold us to these numbers – currently, it's a best guess)

* Please see '**Quote/Est**' in Settings to clarify your '**Text on Quote/Est. Approval**' and '**Terms and Conditions**'. You also have other options such as '**Show Detail**', '**Category Totals Only**' or '**One Value**' and the **Style** for your quote/est

● As needed, tap the **Charges** area and add Charges for Materials, Labor, and so on.

Tap Add, tap the category, the item, and quantity. You can also override the standard description and unit price. (** see Settings Pg 7 about how 'markup on unit cost' works)

To edit or delete an existing line, tap the line involved and then edit or 'Cancel/Remove'

● Tap **Work Performed** to enter work performed, times in/out (if desired), signoff on your work, or update the customer equipment list . Use the 'search' magnifying glass to speed up entry

Tap **Times In/Out** to record your times on the Job. Tap + to add your time spent on the job. Enter a description if you like (driving time, went for parts, etc.) and select time In and time Out. (Note: this is not a Time clock so only enter the times worked on the job).

● Tap **Photos** if you wish to add up to 6 photos to your invoice or quote. You can pull images from your photo album, or take new photos (new photos taken inside Plus do not automatically get added to your photo album, so if you want to add photos to your phone's photo album, first use the regular Camera app to take the shot, store it in the album, and then go back to Plus to pull it in..)

● Tap **Invoice Sum'y** to get a breakdown of your invoice totals. (You also have an option to override the Default Tax Rules for this call. Tap '**Special Tax Rate**' and follow the instructions)
Discounts: If you're offering a Discount, you can tap **Disc't & Pymt** and enter a percentage

● **Signature:** Tap **Print/Email Call** to display the invoice to your customer to review, and if everything looks good, tap Done, and have the customer sign off on the work by tapping **Signature**. Tap **Save** to save the signature.

If 'Double Tap is ON' you can also double tap to remove the signature **before** it is saved. Once you have saved the signature it cannot be removed. (If you have trouble with customers accidentally erasing their signature because of the double tap (lifting their finger up and down accidentally), you can turn off "double tap".

**You can also add to an existing signature: eg, a customer might initial the customer area to say 'proceed', and then again at the end of the job to acknowledge completion.

● **Disc't & Payment:** Tap here if the customer presents payment. **Record** the payment and type of payment if you're recording a check or manually handing the transaction.

Tap **Cred.Card Payment** if you've signed up with the Credit card folks all of your financial info, and enter the card number and other info, or use the Bluetooth CC scanner that the credit card company also offers (See our website page <https://mpengo.com/mpengo-service-call-plus/> and click on the Credit Card Interface button for more info how to set it up)

● **Email/Print** the Service Call, and email a copy to the customer, or if you have an AirPrint compatible wireless printer, tap Print for a hard copy.

● **Close Call:** will close the call and remove it from your open calls list. You are still able to view, print or email this call by going to the **Customer Call History**.

When you tap **Close**, you also have the option of creating a Follow up Call. The original call is closed and a new call is created with much of the same info. There's no rule when to close a call: it's up to you (*free (limited) users are restricted to 6 open calls at a time – subscribe to open it wide up!*)

****If this was a *Dispatched Call* the email screen will pop up when you close the call. The **TO:** field is already populated with the Dispatch Board email address so just tap **SEND** to have the email go to the Dispatch Board and update the status of the call.**

Other Information

We've tried to make this guide easy to understand, and to quickly get you up to speed. If you think there's a topic we should add, or elaborate more on, please let us know!

Similarly, as a small shop, we have the pleasure of being able to make improvements quickly based on suggestions from you (!) so let us know if there's any feature that would make your life easier using the app – probably many others would benefit as well!

If you have questions:

If you have any problems or questions, just tap Support, enter a subject, tell us your question, and tap Send. Remember to first indicate your contact name and email in Settings / Company Info. You can also reach our support people (who are based in both the U.S. and Canada) by sending a direct email to support@mpengo.com.

Develop this App with your support and comments!

If you like what you see, help support us by taking a look at some of our other apps that are also geared to provide help for business professionals out in the field – and tell your friends! We'd like to develop more tools suited to your needs, but need your help to spread the word. And don't forget those suggestions!

A good review on the App Store would also be greatly appreciated!