mpengo Service Sheet: A Quick Start Guide

Welcome to mpengo ServiceSheet! This app is targeted at the service industry where checklists are used to capture information about any process that is performed for a client. The process can be as simple as a multi-point inspection and as complex as the user needs. You are even able to add charges and invoice the customer.

This app allows users to:

- Define answers to be used for different service sheets
- Define additional questions to link to a service sheet design
- Define a simple service check list of questions by one or more categories
- Schedule the service sheets
- Capture information for each of the questions on the service sheet
- Print, Email, Text and even Air Drop (if compatible) simple reports to record, and manage the information captured on the device.
- Add charges to the service sheet

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]**. Enter your subject & question, tap [Send], and our Support folks will answer you quickly.

For a Guide, send Support an email requesting the Quick Start Guide. We also have a more detailed manual if you desire. Just let us know and we will send you a link!

App Buttons and functions:

Generally, the app uses the following conventions:

[Actions] button (when in Portrait mode) – Displays the menu items

[<...] - <u>return</u> to the previous screen or menu.

[Done] – <u>saves</u> your work and returns you to the previous screen.

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

[Delete] – tap to display a list of records that can be deleted.

[Order: Ascending] button – Tap to choose the sort order for the Service Sheets (Descending, Ascending, Today only)

[Close Sheet] – tap when finished to close the Service Sheet. The Service Sheet will be in Customer History and can be reopened within 24 hrs.

[Reorder] button – tap and hold to move and rearrange the order

Print – tap to preview then access print, email, or share button

Photos – tap to add up to 8 photos by using the camera or accessing your photos app.

Legend – tap to view the answers legend for the open service sheet

[Share] icon – Tap to share (mail, message, air drop and more)

Support – Tap to send Support an email

ServiceCall – Tap to access Service Call Actions

Sample Service Sheet
Tap the Customer name, date, or tech name to change or reassign

Tap to enter Customer or Tech Signature.

Tap on Invoice button to review or enter charges.
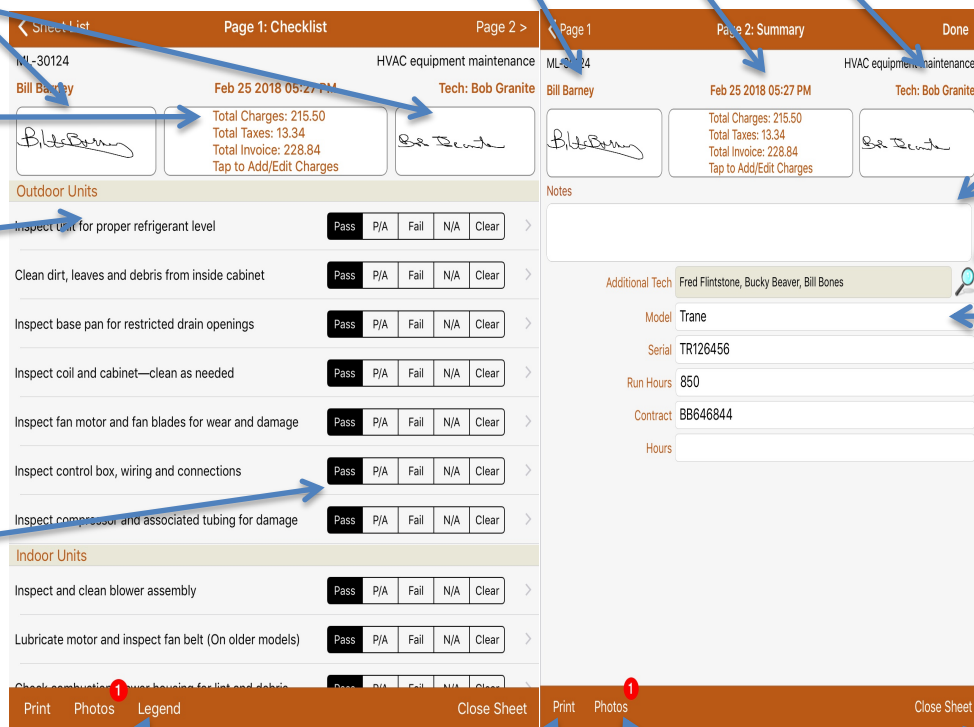
Tap on an Action/ Question under each Category to enter notes.

Tap on an answer choice for the question or tap clear to remove your selection and any notes.

Enter any notes or comments.

Select any additional techs.

Enter answers for additional Questions.

Tap to view Answer legend.

Tap to View, Print or Email.

Tap Camera to take or attach photos. Badge shows number of photos attached.

Close Service Sheet and send to Customer history file.

Setup

Setup: General
- **Company Info:** Tap to enter your company information, logo and registration.
- **Support info:** Enter the name of the person that we generally work with if they have questions about the app, and enter the email address we should send responses to. Carbon Copy email is to let you send an additional copy to yourself or someone else in the company for record keeping.

Actions	Setup: General	Support
Primary Tasks	Information	
Home	Company Info	>
Reports	Support Info	>

General: App Options: Select to access more options for Service Sheet and Shared App Options.

Options	
App Options *Options to configure the operation and functionality of the app.*	>
Diagnostic Options *Options to configure the debug and diagnostic features of the app.*	>
Shared App Options *Options to configure application information used by the apps using the shared sandbox.*	>

General: App Options-Global:
- **Calendar Type:** select Wheel or Calendar.
- **Use HTML for email message body:** email message will be created in HTML format. (Default is **OFF**)
- **Auto-format telephone numbers:** Auto-format phone numbers based on current locale of the device. (Default is **ON**)

Color Themes:
- **Select App Background Color:** select color to be used for the app background: 1=Lt. Brown, 2=Lt. Grey, 3=White, 4=Grey, 5=Almost Black. (Default is 2)
- **Auto-switch background color when Dark Mode is active:** turn ON to Automatically change background color when Dark Mode is active (iOS13+). (Default is **OFF)**
- **Select Dark-Mode background color:** Select background color to use when Dark Mode is Active: 1=Grey, 2=Almost Black. (Default is 2)

General: App Options-Backup:
- **Include Photos:** Include all photos in the Backup; the photo files will be lost if not included in the backup. (Default is **ON**)
- **Compress Backup file:** compress the backup data to reduce the amount of space used. (Default is **ON**)

‹ Setup: General	Setup: App Options	Done
Global		
Calendar Type *Select the type of control to be used when selecting a date.*		Wheel / Calendar
Use HTML for email message body *Email message will be created in HTML format.*		OFF
Auto-format telephone numbers *Automatically format telephone numbers based on the current locale of the device.*		ON
Color Themes		
Select App Background Color *Select the color to be used for the app background:* *1 = Light brown, 2 = Light Grey, 3 = White, 4 = Grey, 5 = Alm…*		1 2 3 4 5
Auto-switch background color when Dark Mode is active *Automatically change background color when Dark Mode is Active (iOS 13+)*		OFF
Select Dark-Mode background color *Select background color to use when Dark Mode is Active: 1 = Grey, 2 = Almost Black.*		1 2
Backup		
Include Photos *Include all of the photos in the backup; the photo files will be lost if not included in the backup.*		ON
Compress Backup file *Compress the backup data to reduce the amount of space used.*		ON

General: App Options-Service Sheet:
- **Compact Service Sheet List:** use a more compact format on Home screen. (Default is **OFF**)
- **Customer Signature required**: turn ON to override layout and force for all designs. (Default is **OFF**)
- **Tech Signature Required**: turn ON to override layout and force for all designs. (Default is **OFF**)
- **Require All Answers**: force all sheets to require all questions to be answered before sheet can be closed. (Default is **ON**)
- **Hide Question Numbers:** turn ON to **NOT** print numbers for the questions when printing a service sheet. (Default is **OFF**)
- **Allow additional Tech names:** allow service sheet to include additional Tech names. (Default is **OFF**)

General: App Options-Debug / Diagnostic Tools:
- **Allow access to diagnostic options / tools:** Troubleshooting and support functions. (Default is **OFF)**

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General: Options-Shared App Options-Registered Apps: Setup the parameters for using the shared app options between Service Call and Service Sheet. This displays the list of registered apps and any iPad Prefix you may have setup for the call numbers in each app
- **Service Call:**
- **Service Sheet**

General: Shared App Options-Service Sheet Options:
- **Layouts:** select on or more layouts to be presented as a list for the user to select when requesting a new service sheet from the other apps sharing the sandbox.
- **Service Tech:** Tech to use as the default when creating a new service sheet from the other apps sharing the sandbox.
- **Disable Invoicing for sheets associated with a call:** disable invoicing for any service sheet associated with a call. (Default is **ON**)

General: Shared App Options-Service Call Options:
- **Email Service Sheet PDF when sending email for Service Call:** email the Service Sheet when emailing the Service Call. When you email the Service Call the Service Sheet app will open to also email the Service Sheet associated with the call. (Default is **ON**)
- **Use Current Date/Time:** use the current date/time when creating a new service sheet from Service Call. (Default is **ON**)

‹ Setup: General	Setup: Shared App Options	Done
Registered Apps		
Service Sheet		
Service Call		
Service Sheet Options		
Layouts		0
One or more Layouts to be presented as a list for user to select when requesting a new service sheet from the other apps sharing the sandbox.		›
Service Tech		
Tech to use as the default when creating a new service sheet from the other apps sharing the sandbox.		›
Disable Invoicing for sheets associated with a call		
Disable invoicing for any service sheet associated with a Call.		⬤
Service Call Options		
Email Service Sheet PDF when sending email for Service Call.		
Email Service Sheet PDF when sending email for Service Call.		⬤
Use Current Date/Time		
Use current date and time when creating a new service sheet from the other apps sharing the sa...		⬤

***Please refer to the manual for** 'Using Service Call and Service Sheet' **for further instructions.
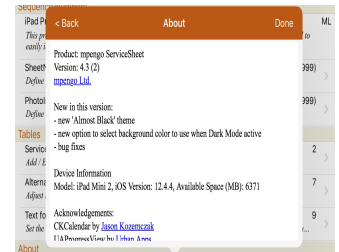 (Page 18)**

General: Sequence Numbers
- **iPad Prefix:** This prefix will display as the first part of each sequence number: use a different prefix for each iPad to easily identify where the information was created.
- **SheetNumber:** Define the range of numbers to be used for each service sheet created on this device.
- **PhotoIndex**: Define a range of numbers to be used for images captured using the camera on this device.

General: Tables/About
- **Tech:** Add / Edit information about each service tech.
- **Alternate Phrases**: Adjust the text displayed/ printed for 'Invoice Terms, License, Service Tech, Summary Notes, and Terms1, Terms2, and Terms3, used in the app to better fit your business.
- **Text for Forms / Reports**: Set the context for static text messages included in email messages, reports and forms to better fit your business.
- **About**: displays App version. Tap to see What's New in this version and device information.

Setup: Invoicing:

Invoicing: Options
- **Hide Invoicing Buttons**: Option to turn ON to hide the Invoice summary button when there are no existing default charges. (Default is **OFF**)

Invoicing: Settings

- **Price / Rate Categories**: All rates/prices are separated into 5 categories. You can change the default categories and short form here.

- **Pricing Options:** By default, Service Sheet uses the 'Rate/ Unit Price' from the rate table. To use a cost and markup percent turn ON the option and enter a 'Markup Percent'.

- **Tax Rules:** Enter the tax percent and description. Enter your Registration number if applicable.

Invoicing: Tables – Rates: tap to add or delete rates or modify existing rates. Rates are sorted by category.

- To add a rate, select the category and then tap *'Add'* on the toolbar on the bottom of the screen.
- **Rate/Price Code** (alpha/numeric): enter a short code for the item. This could be a part number or an abbreviation of the description. (Items are sorted by this code and each one must be unique; numeric codes will be displayed before alpha codes in the list).
- **Description**: Enter a brief description of the item.
- **Rate / Unit Price**: Enter the price for the item (Do NOT enter dollar signs when entering the price).
- **Item is subject to Tax**: Turn flag ON if the item is taxable. Turn OFF if it is not a taxable item.
- **Cost:** Enter the Cost if applicable. If you have 'Markup' turned ON in Pricing Options and have a unit cost entered for the item the Cost will be used.
- Press **Done** to save the item and return to the list.

Invoicing: Tutorials:

- Create / Import – Rates: an overview of the process to create or import rates.

Primary Tasks (Actions Menu)

Home:
- View the list of open service sheets or tap '***Add'*** to start a new one.

Reports: tap to access General reports such as:

- **Service Activity:** Summary of Service Sheet activity by date range, status and choice of sort order for all or individual customer.

- **Customer Service Summary:** This report includes the details, additional questions, and notes for the service sheets within a selected date range for a customer or all customers. If any of the service sheets for a customer include charges, a summary of charges will be included after the service sheets. Option when running the report by individual customer to include a copy of the referenced service sheets.

- **Customer List:** tap to run a simple list of customers.

- **Blank Service Sheet:** tap for a list of your Service Sheet Layouts. You can select an individual sheet and view, email or print the sheet.

- **Invoice Register:** summary of invoices for all customers or by individual customer for a date range or all dates. Option to choose your sort order for the report.

- **Rates / Price List:** Report of current rates / prices which can be viewed, emailed or printed.

Customers & Service History: tap to add, delete or maintain customer information.

- Tap the *Add* to add a new customer.
- If you have previously entered the customer in the Apple Contacts app then tap 'Contact' to select the name or enter manually.
- Enter any pertinent information on this screen.
- If the customer is 'Tax Exempt' be sure to turn ON the button for tax exempt.

Customer - Billing Address, History, & Notes

Billing Address:
- Tap 'BillTo-Address' and enter the billing address if different than the service at location and press Done. (This will show on the Email/Printed Service Sheet in the Customer Section).

Service Sheet History:
- Closed Service Sheets for the customer are stored and accessible by tapping the History button. A closed Service Sheet can be reopened within 24 hrs. after the closing date and time. If you are using the Invoicing part of the app then payments can still be added to a closed sheet.
- The Service Sheet can be Email/Printed or viewed.
- Tapping 🗑 will allow you to select individual sheets to delete or you will have the option to tap History, which allows you to delete all closed Service Sheets before a specific date you specify.
- Pressing 'Done' will give you the option to Confirm or Cancel deletion of all closed Service Sheet.

Notes:
- Once the customer information has been saved, you can tap the 'Notes' button to add notes for the customer.

Tools & Tutorials

Backup, Sync, and Export:

Backup / Restore:
- Tap *'Backup'* to create a backup of your data then tap to select the backup and email it to yourself for safekeeping by tapping the share button or email button depending on your iPad. If you change iPads you will then have a backup file to import into the App on your new device. In case of data loss you can also restore a backup or safety backup by selecting the one you want to restore and tapping 'Restore'. (Safety backups are created whenever you import a file or restore a backup).
- **Note:** Backups should be done on a regular basis and emailed to yourself. Then, occasionally Clean Up the old backups and safety backups in the app to save space by tapping 'Cleanup'. The 'Clean up' feature also has an option to 'Only delete the safety backup files'.

Synchronize Configuration:
- Send a copy of your configuration information from one iPad to another and update if not used in an active sheet. You have the option of choosing All or Selected Data.

Synchronize Layouts:
- Send information for selected Service Sheet Layouts (including answers, categories, and additional questions) from one iPad to another and update if not used in an active sheet.
NOTE: To import sync file in iOS13+, tap and hold on the attachment until the menu is displayed. Tap the share option to get the action list and slide the list to locate the Service Sheet app

Export Data:
- Export Data to your PC in a tab-delimited txt file. Choose from Invoice Register, Invoice Register w. Details, Customer List and Rates/Prices.

Tools	Support
Backup / Restore	
Create a backup of your data, which you can also send to your PC for safekeeping. In the case of data loss, or if you change your device, you can restore your data to the device.	>
Synchronize Configuration	
Send a copy of your configuration information from one iPad to another and update if not used in an active sheet.	>
Synchronize Layouts	
Send information for selected Service Sheet Layouts (including answers, categories, and additional questions) from one iPad to another and update if not used in an active sheet.	>
Export Data	
Export data (invoice summary, invoice details, customers, rates) in a simple tab-delimited text file.	>

Tutorials:
You can view the other Tutorials for additional information about using the app or request the Quick Start Guide from our support team.

Tutorials	Support
Overview	
Overview – Navigation	
Explains how to navigate through the app and gives an overview of some of the main features of the app.	>
Using the App	
Using Service Sheet	
Walk through the process of using a service sheet from the home screen, scheduling a service sheet, answering the questions, adding charges, capturing signatures, closing the service sheet, and printing…	>
Creating a New Layout	
Walk through the process to create a new layout: review / create answers, review / create additional questions, create new layout, adding categories, questions, and default charges.	>
Importing Data	
Create / Import – Customers	
An overview of the process to create or import Customers.	>
Create / Import – Rates	
An overview of the process to create or import Rates.	>

USING MPENGO SERVICE SHEET
Components for creating a new Service Sheet (Layouts / Templates)

Each Service Sheet includes:
- The type of *Answers* to use in response to each action / question.
- A list of *Additional Questions* to record information on the service sheet **(optional).**
- *Layout* template of the categories and actions or questions for your checklist.

Step 1: Create the *Answers* (responses to questions / actions) to be linked to the Layout.
- Tap *'Add'* to create a new answer sheet.
- **Short Name:** Enter a short name for the Answer sheet.
- **Description:** Enter a Description.
- **Number of Choices:** Select the number of answers you will use (2, 3, 4).
- **Automatic Notes for answers other than the first:** Select whether to have the notes screen pop up automatically when filling out the service sheet.
- **Print explanation of answers at bottom of form:** Select whether a legend should be printed on reports to explain the codes.
- **Choice Code & Help Text:** Enter a short code and description for each answer. Keep answer code short (8 characters or less) so the text will fit on the button. These codes can be alpha or numeric.

(***Note:*** you can have more than one set of answers that can be used in a Layout. When creating the layout, link a default set of answers but when entering the Categories, you will have the option of overriding the default set of answers with another set or the option to add alpha/numeric fields.)

Step 2: (Optional) ***Additional Questions*** you may want to ask on the Service Sheet. The answers can be alpha or numeric. (**Note:** by selecting 'Text' the Alpha keyboard will pop up and by selecting 'Number' the numeric keyboard will pop up.)
- Tap *'Add'* to create a new list of Questions.
- **Short Name:** Enter a short name for the list of Questions.
- **Description:** Enter a description.
- **Tap +** to add a field.
- **Field Label:** Enter a short phrase for the question.
- **Type:** Identify whether the answer is text or number.

Step 3: *Creating the Service Sheet Layout*

- Tap *'Add'* to create a new Layout.
- **Short Name:** Enter a short name for the layout. (**Note:** when pressing enter or tapping in the Description field you will have the option to 'Copy' from an existing layout and then change the Description and any other info on the new layout).
- **Description:** Enter a description to identify the layout.
- **Status** – An 'Active' status will display the layout in the list of Service Sheets available to be used. 'Disabled' will remove them from the 'Available list'.
- **Answers:** select the answers to be used for the layout by tapping the magnifying glass or X to clear your selection.
- **Default Answer** (optional)**:** you can select a default answer to be used for the layout. Tapping the Clear button will remove your selection.
- **Additional Questions** (optional)**:** select the Additional Questions (if any) to be used for the layout by tapping the magnifying glass or X to clear your selection.
- **Customer Signature, Tech Signature Required and Require all Answers** can be set by individual layout. (If you wish to have these options mandatory on all layouts you can choose this in General – App Options).
- **Repeat Method:** The repeat method option is used to define how to duplicate the questions in a category.

  Values:

  None (Default):
  Each category will appear in the layout only once.
  Category:
  Each category can be repeated 1 or more times.
  Layout:
  The entire layout will repeat the number of times specified in the 'Repetitions' field.
  Groups:
  When one or more consecutive categories has a repetition greater than 1, they will repeat as a group. All categories in the group will appear in the layout one after the other and then the entire group will be repeated the number of times defined in the repetition value for each category.

  Example: Servicing HVAC Units
  Note: To better identify which 'Outdoor Unit' and 'Equipment Info' or location of unit we suggest the first question under the category be Description or Location. This will allow the tech to identify which one he is working on.

  - *Repeat Method: Category*
    In the category definition enter 3 as the number of repetitions for each of the two categories 'Outdoor Units' and 'Equipment Info'.

    When the sheet is printed or displayed, the categories will appear in the following order: Outdoor Units 1, Outdoor Units 2, Outdoor Units 3, and then Equipment Info 1, Equipment Info 2, Equipment Info 3, using all the same questions.

  - *Repeat Method: Groups*:
    In the category definition enter 3 as the number of repetitions for each of the two categories 'Outdoor Units' and 'Equipment Info'.

    When the sheet is printed or displayed, the categories will appear in the following order: Outdoor Units 1, Equipment Info 1, Outdoor Units 2, Equipment Info 2, Outdoor Units 3, Equipment Info 3, using all the same questions.

- **Charges button:** Tap if you wish to add default charges for this Layout.
  Note: if you wish to hide the Invoice button from your service Sheet then go to Invoicing section and turn ON Hide Invoicing buttons).

- **Define Categories:** tap the + sign to add a new category. Enter a description for the category.

  Value: When 'Override default answers in this category' is turned ON the following options are available:

  - 'Manual Entry' allows the person to enter his or her own alphanumeric answers. (**Note:** the 'Text' or 'Number' selection determines the keyboard that will pop up).
  - 'Or use Answers' allows you to select a different set of Answers to be used for this category.
  - 'Default answer' (optional)**:** gives you the option to select a default answer for this category.

- **Define Questions:** tap the + sign to add a new question under the category. Enter a description for the question.

- **Live View:** Tap 'Live View' to see how your layout will look. Tap 'Edit View' to go back to the questions.

Now it's time to schedule your first Service Sheet

From the Home Screen:

Tap the **'Add'** button on the toolbar at the bottom of the 'Home' screen and select the Layout for the service sheet. Then fill in the information to schedule the service sheet.

- Select the date, time, and customer for the service sheet.
- Select the service tech to perform the work.
- Select 'Additional Questions' (if applicable) from similar closed service sheets. (When available, you can tap on the magnifying glass to bring up a list of closed service sheets that used that same design. You can select one that has the questions filled in and that may work for this service check. This is just to save time and data entry. Any of these answers can be changed on the new service sheet).
- Fill in the additional information. (This can also be filled in once the sheet has been opened).

Tap **'Save & Continue'** to complete the scheduling of the service sheet.

Next, the list of actions/questions for the service sheet is displayed.

These can be answered by:
- Tapping on the selections to the right of the action/question (e. g. Pass, Fail, N/A or Clear to clear your selection etc.) or by typing the answer if it is a numeric or text field.
- To enter specific notes for that action/question tap on the Question to open the 'Add Notes' box.

Buttons on the Toolbar are:
- Print / View / Email service sheet with invoice details.
- Attach up to 20 Photos to sheet.
- View legend for answers.
- Go to page 2.
- Close the service sheet.

Page 2: The second page of the Service Sheet shows:

- Additional techs (if applicable) can be added by tapping the magnifying glass.
- Additional questions (if applicable) requiring simple text answers.
- Summary notes or comments related to the overall service sheet.

Tap the buttons near the top of the screen to change customer, service tech, date, capture signature for customer or tech (if required by the service sheet), or review / add charges to the Invoice.

Invoice Information: Tap on the Invoice Summary button near the top of the service sheet to view a more detailed invoice summary and add or change the invoice details.

On the Invoice Summary Screen, tap 'Add / Edit Charges' or 'Details' button to view a list of the charges. From this list:
- Tap 'Add' to choose from a list of charges to enter on the Invoice.
- Tap 'Delete' to delete one or more charges.
- Tap a line to change an existing charge.

Tap 'Done' when complete to go back to the invoice summary.

Recording payment: Tap on the Invoice Summary to add a payment or enter a discount %.

- Discount %: enter the discount percentage if applicable.
- Payment Type: enter the type of payment such as check number, cash, credit card etc.
- Payment Amount: Enter the amount of payment.

Closing the Service Sheet: If the Service Sheet is completed tap 'Close Sheet'**.**
- If all the required information has been gathered for the service sheet, a message will display asking you to confirm that you want to close the sheet. Tap 'Yes' to close the sheet or 'No' to keep the sheet open.
- If the service sheet is incomplete, a message will then display identifying the information that is required to complete it. Tap 'OK to acknowledge the message. Then go back and enter the required information and tap 'close sheet' when finished.
- When you choose to close the sheet, a second message will display asking if you want to print or email the sheet. Tap 'Yes' to go to the print preview where you can then email or print or tap 'No' to just continue closing the sheet without emailing or printing.
- *NOTE:* A closed sheet can only be reopened within 24 hrs. of the closing date and time.

Adding a payment after Service Sheet is closed:

- Select Customers & Service History.
- Select the customer.
- Tap on History.
- Select the service sheet.
- Tap on the Invoice Summary button to add payment and press Done to save.

Using Service Call and Service Sheet

Overview

Old Data Export

The only way to share information in older versions of these apps was to use email to send customers and rates, then to tap and hold the attached file in the email app on the device to install the data into the selected app.

New Connected Apps

The latest versions of these apps now include the ability to share information between the apps without the need for an internet connection. The only requirement is that both apps must be installed on the same device.
Once the apps have been installed on the same device and started for the first time, the customers and rates can be exported between the apps. A new service sheet can be created for an existing call, and you can easily switch between each of the apps.
When using the new option on the Actions menu in either app to export data from one app to the other, the second app will automatically load and display the import summary information for the selected export.

Shared Apps Configuration

We recommend the Shared App configuration steps be performed in the Service Sheet app first to reduce extra steps to configure Service Call.

Service Sheet

Select *Shared App Options* from Settings to view / update the Shared App configuration options for Service Sheet.

‹ Setup: General	Setup: Shared App Options	Done
Registered Apps		
Service Call		Prefix: CD
Service Sheet		Prefix: ML
Service Sheet Options		
Layouts		1
One or more Layouts to be presented as a list for user to select when requesting a new service sheet from the other apps sharing the sandbox.		›
Service Tech		Mary
Tech to use as the default when creating a new service sheet from the other apps sharing the sandbox.		›
Disable Invoicing for sheets associated with a call		
Disable invoicing for any service sheet associated with a Call.		🟢
Service Call Options		
Email Service Sheet PDF when sending email for Service Call.		
Email Service Sheet PDF when sending email for Service Call.		🟢
Use Current Date/Time		
Use current date and time when creating a new service sheet from the other apps sharing the sa…		⚪

This screen shot shows the default values for the options.
Tap *Layouts* to select the layouts to be visible to the other apps using the shared sandbox. Tap *Service Tech* to select the service tech to be used for any service sheet created from the other apps sharing the sandbox.
We recommend setting the option to disable invoicing for sheets associated with a call since most calls will include charges for the work performed.
If you are using Service Sheet for other activities not related to Service Call, these sheets call can still have charges attached to the sheet.

Service Call

Select *Shared App Options* from Settings to view / update the Shared App configuration options for Service Call. This screen shot shows the default values for the options.
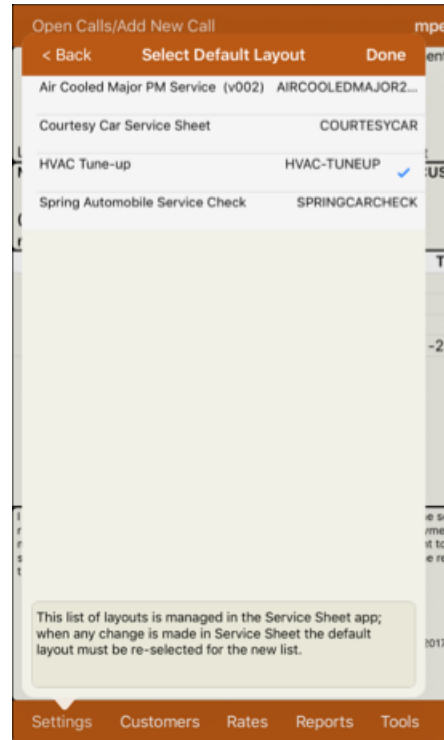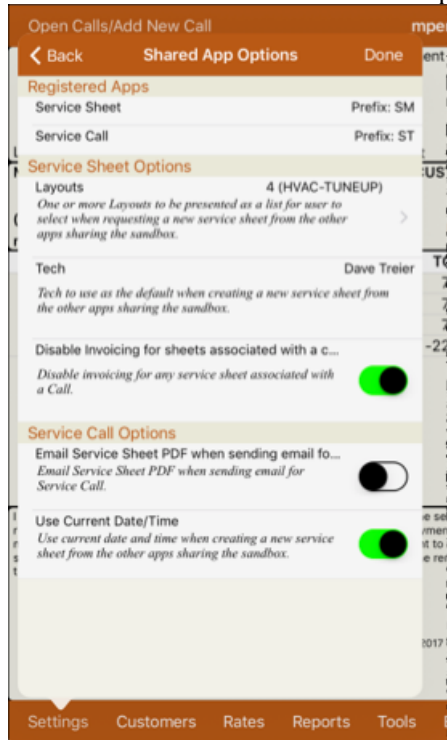
The list of registered apps shows the apps installed on the device with access to the shared sandbox. These apps are designed to share information be used together.

Tap the *Layouts* option to set the default sheet layout to use when creating a new sheet. Once selected, the default layout will display in the list on the Shared App Options page.

Export Data to App

Select the export option for the app you are currently using to push information to the second app. The data will be merged with any that may already exist for the other app.
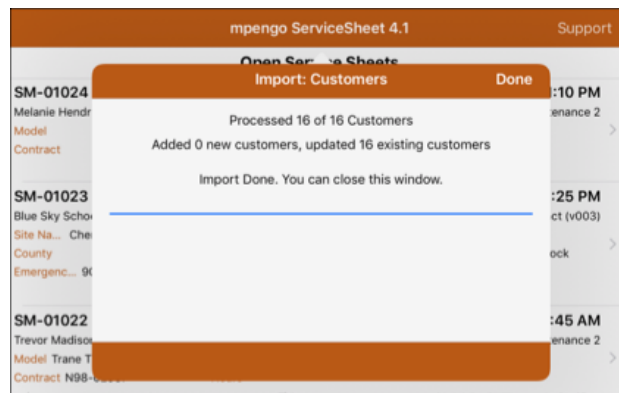
Service Call

Tap the Service Sheet button on the toolbar to access the list of actions that can be performed from Service Call to Service Sheet.
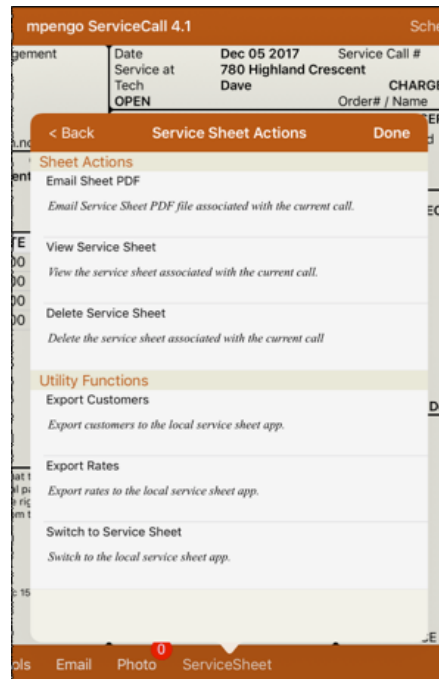
The *Utility Functions* section of this list includes options to Export Customers, Export Rates, and Switch to Service Sheet.

Service Call – Export Customers

Tap the Export Customers option in the list to begin the process to export the full list of customers from Service Call to Service Sheet. This will trigger an automatic switch to the Service Sheet app and show the Import Customer summary information.

Tap the Done button to close the window and then tap the Service Call button on the toolbar to view the Service Call actions list and select the option to Switch to Service Call.
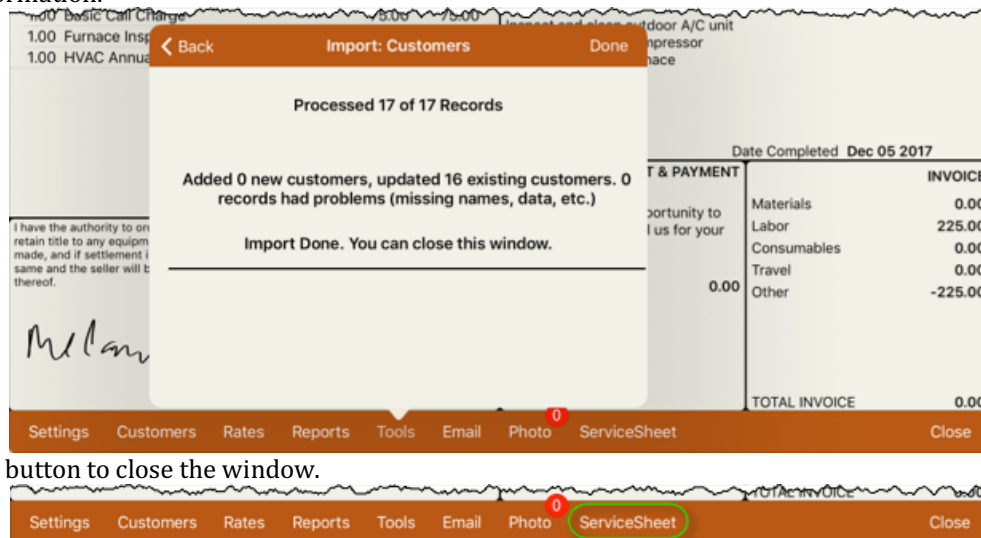
Service Sheet

Tap the Service Call button on the toolbar on the Home screen (List of Open Service Sheets) to view the list of actions that can be performed from Service Sheet to Service Call.

The *Utility Functions* section of this list includes options to Export Customers, Export Rates, and Switch to Service Call.

Service Sheet – Export Customers

Tap the Export Customers option in the list to begin the process to export the full list of customers from Service Sheet to Service Call. This will trigger an automatic switch to the Service Call app and show the Import Customer summary information.

Tap the Done button to close the window.

Tap the Service Sheet button on the toolbar to access the Service Sheet actions list and select the option to switch to Service Sheet.

Other Information

A note on Memory: you may encounter memory limitations on your iPad (most iPad's come with 1GB of working memory which is divided up between the internal operating system and your active apps—we're not referring to the 16GB, 32GB, or 64GB storage that you purchased with your iPad - that is data storage). To make the most memory available for ServiceSheet or other apps, close down the apps that are active in the background. Closing down old games and other unused apps will usually free up plenty of memory.

To close apps active in the background
- Double tap the Home button to bring up the multitasking view.
- Swipe or flick up on the screenshot (not icon) of the app you want to exit.
- The app will fly off the screen and release its resources.
- When done, tap the screen with all your icons or double tap the home button.

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 Set Up / Support Info.
You can also reach our support people (who are based in the U.S. and Canada) by sending a direct email to
support@mpengo.com.

Happy mpengo'ing!

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 send us your suggestions!

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