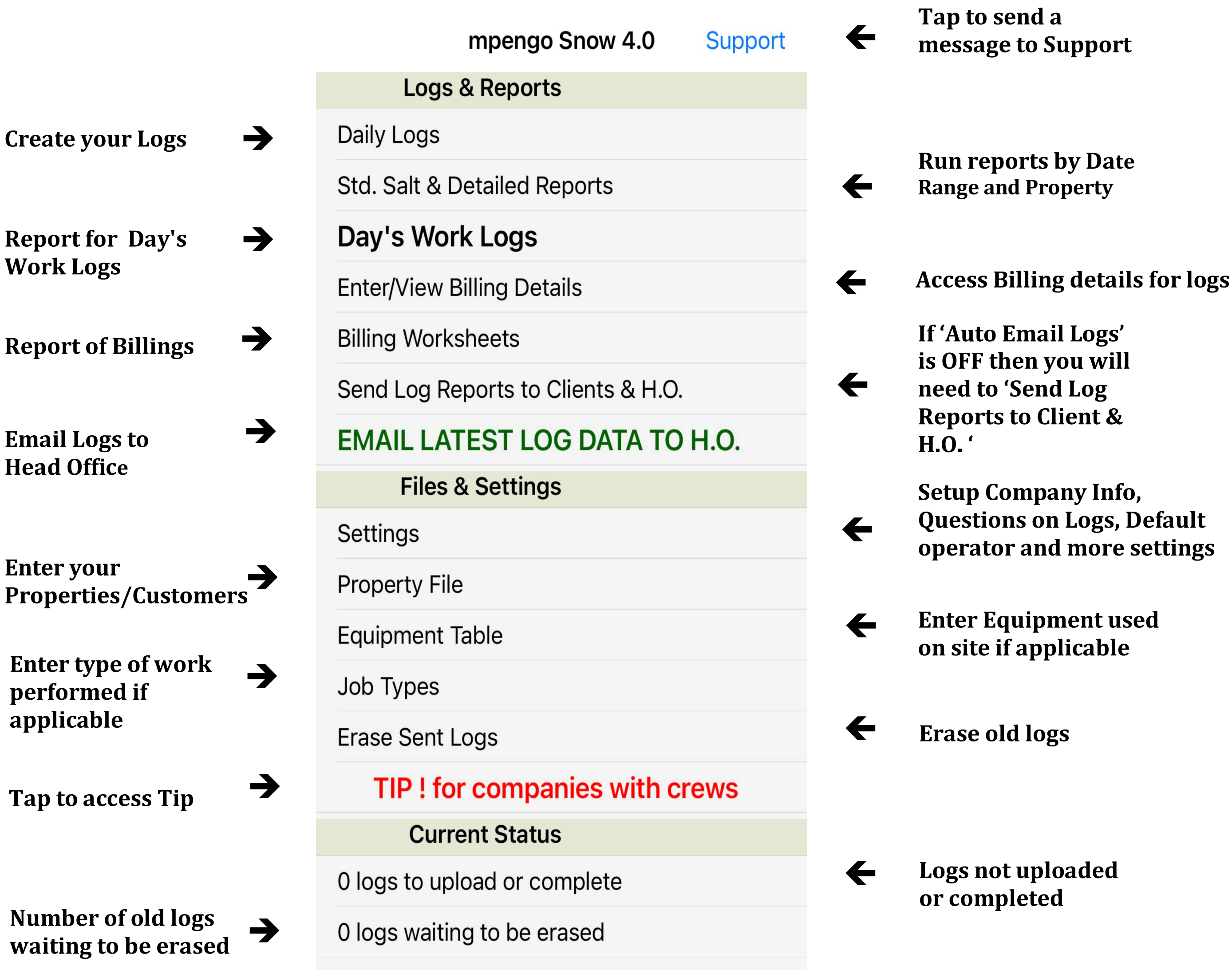
mpengo Snow: A Quick-Start Guide



App Buttons:

Generally, the app uses the following conventions:

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

[+] icon – tap to add a new record/property

[Trashcan] icon – tap to delete a record

[<] Back - tap to return to the menu

 tap to access camera

NEW FEATURES AND ENHANCEMENTS:

- **SYNC:** A tool that permits the Home Office device to create settings, properties and billing tables on their 'H.O' device and send to a new iPhone for quick setup. This can also be used periodically to keep all the crew devices up to date with the latest property and billing detail. (Page 7)

- **Email Latest Log Detail to H.O.**: lets crews send up their log reports at end of day to the Home Office iPad for checking, editing, historical inquiry and all reporting. (Page 2)

- **Lock & Hide Admin Options:** Home office can now also set password control on crew devices to leave important files protected with a changing password and also reduce clutter on the main screen, showing only the functions they require. (Page 5)

BASIC OPERATION:

- Go into **Settings**, setup your Contact info and email addresses. Create your **Questions on Log**, **Default Operator**, and set your defaults in **More Settings.**

- Build your table of **Properties.** You also have the option to sync your property file to another iPhone or iPad with mpengo Snow. Use **Re-Order** to arrange the properties according to your route.

- Daily, as you clear each property, record a **Daily Log**: enter the date, times in/out, answer some questions, and take some photos of the cleared work, and potential slip & fall areas. (If using the Billing Module see instructions Page 3). When finished Save & Lock the log.

- Once a week (or sooner), if you have **NOT** set the switch to automatically Auto Email Logs, tap '**Send Log Reports to Clients & H.O'**. This will email logs for the date range and properties you selected to your client and laptop or office computer. Photos are only sent to your business or home office and <u>not</u> to the client. Please note that If you cancel out of the first email screen that pops up for each property, the log will not be considered 'uploaded or sent'. It will remain in the 'Log to Upload or Complete' section. If you have set the **Auto Email Logs** switch to **ON** (recommended) then the logs will be sent to the Office email in settings but **NOT** the Property owner.

- **Email Latest Log Data to H.O:** This routine will bundle up all recent logs (that have not been erased,) photos, and their associated property descriptions. They will be emailed to Home Office, where the logs can be stored and made available for reporting. When the file is imported to the Home or Office device with mpengo Snow it will flag the logs as OPEN. Now the Home Office has the logs for checking, editing, historical inquiry and all reporting.

- In **Current Status** you will see what logs have to be completed, uploaded or waiting to be erased.

- Once a month (or sooner), clear out the old finished logs from the previous month by tapping '**Erase Sent Logs'.** Remember to run any reports before erasing logs.

- Run **Reports** whenever you wish. (**Note:** Once logs have been 'Erased' from the app they will no longer appear on reports.)

OPTIONAL BILLING WORKSHEET MODULE:

The Billing Worksheet Module does not cut invoices but collects the data, calculates the charges, and produces a report that can be used internally for billing or as a backup to an Invoice.

Setting up the Billing Module:

- In Settings, go to **More Settings**, and turn **ON** the question **'Include Rates & Pricing in Billing Details Module'**. If you do not want to show pricing you can keep this flag **OFF**.

- **Equipment Table:** Enter equipment used on site (e.g.) Dump Truck, Sander, Front End Loader etc. and how its charged – flat fee, or per hour.

- **Job Types:** Enter type of work performed and how it's charged – flat fee, per hour, or by quantity used (e.g.) $15/cu. ft. used.

How to use the Billing Worksheet Module:

- Tap **'Daily Logs'**, select the date if different than the default, tap 'Add New Log' and select the property, then tap proceed.
- When in the log tap on **'Billing Details for this Log'**.
- Select **'Tap line to edit, or Tap here to add entry'**
- **Lock & Hide Admin Options:** Home office can now also set password control on crew devices to leave important files protected with a changing password and also reduce clutter on the main screen, showing only the functions they require. (Page 5)

- Tap **'Equip'** to select equipment used on the job. (you have the option to override the rate if using this feature).
- Tap **'Job Type'** to indicate what you did, and if it's charged based on amount of quantity supplied (e.g. Sand), enter that quantity also. (again, you have the option to override the rates).
- **'Done 'or 'Save, more for this Log' buttons** will save your entries and take you back to the previous screen to add more entries, or to tap on 'Log Details' to go back to your log.
- **Save & Exit button** saves your information and takes you back to the Home screen (Main menu) and keeps your log open.

ENTER/VIEW BILLING DETAILS FOR A LOG:

On the Home Screen select **'Enter/View Billing Details'**, select the property, and select the date of the log. If it finds a log for that property and date, you will be presented with the charges, if any. You can add charges for that log or edit the existing charges by tapping on that charge or tap on **'Tap line to edit, or Tap here to add entry'** to add a new entry. (**Note:** Billings are accessible even after the log has been erased).

BILLING WORKSHEETS:

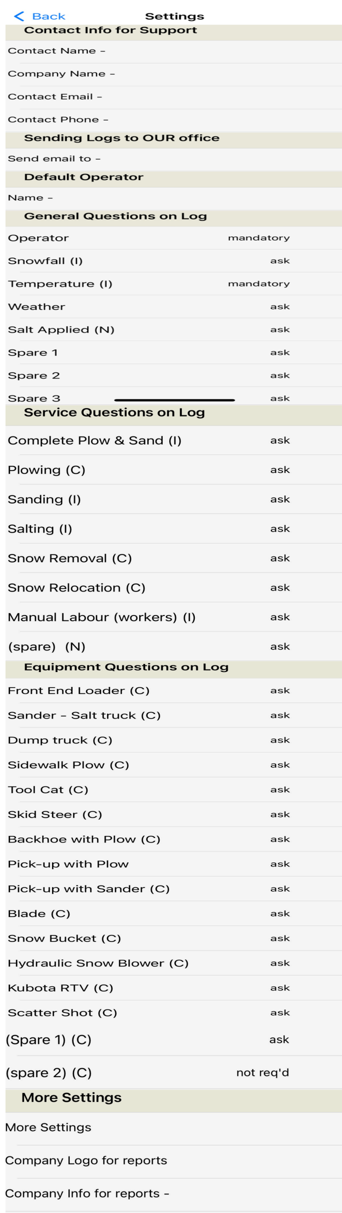
To produce a **Billings Report**, select **'Billing Worksheets'** on the Home Screen. Tap on 'Select Properties' then tap on properties desired and press Done. Next select the date range for the report and tap 'Proceed'. This creates a report of billings by property that can be printed or emailed.

SETTINGS:

Contact Info:
Enter your name, company, personal email, and telephone so that we are able to help you if you have a Support question. We never share your address with anyone. Remember to tap **DONE** after each entry to save your information.

Sending Logs to OUR Office:
- **Send email to:** When you upload logs to your laptop or office computer for safekeeping, you'll need a company email address to send them to.

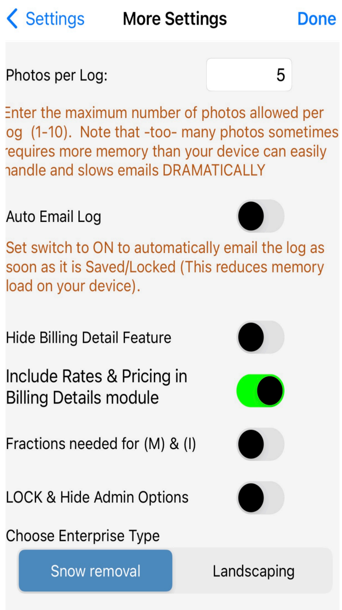
Default Operator:
- **Name:** If you are Bob Loblaw, and this is the iPhone that you use when you go perform your jobs, then make 'Bob Loblaw' the Default Operator. It'll make recording of daily logs quicker, even if some days you hand off your work (& your iPhone) to someone else. Don't worry: you can always change the name when entering the Daily Log.



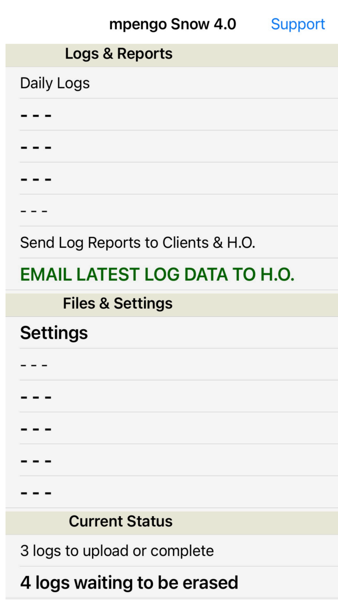
Set of Questions on Log:
There are 32 Questions that can be asked: the original 8 'General' Questions, 8 related to 'Service Performed', and 16 relating to 'Equipment Used'. You can also choose to make any question either: Mandatory, No, but ask, or Not Req'd. If set to Not Req'd that line will not appear on your log.
We've preset a few of them to standard questions that most operators would use. Questions can be changed to suit your needs.

(M), (I), and (N) – these three codes in the question tell Snow to pop-up a number wheel. Generally:
- Put **(I)** on the end of a line to popup a number wheel if you are in the U.S., or want Imperial units
- Put **(M)** for metric units (degrees Celsius, snow in centimeters)
- Put **(N)** for numbers that need fractions (e.g., 0.25 tons of salt applied).
- Put **(C)** if all you require is a 'Yes I did it', to get a checkmark √

MORE SETTINGS:



Screenshot when Lock & Hide is turned ON



- **Photos per log:** enter the maximum number of photos allowed per log. **Note** that too many photos sometimes require more memory than your device can handle and slows emails DRAMATICALLY!

- **Auto Email Log:** set switch to **ON** to automatically email the log as soon as it is Saved/Locked. This only sends logs to Office and NOT to the Client.
  This reduces the memory load on your device).

- **Hide Billing Detail Feature:** Turn **ON** to hide menu buttons related to billing module.

- **Include Rates & Pricing in Billing Details module:** set switch to **ON** if you want to use pricing in Equipment Table and Job Type.

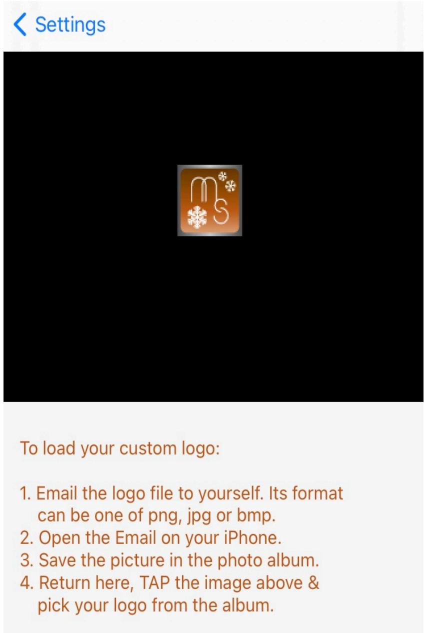
- **Fractions needed for (M) & (I):** Turn **ON** if you need to use fractions when using Metric or Imperial Units of measure.

- **LOCK & Hide Admin Options:** If you don't want your employees to have full access to the menu options turn **ON** this feature on their device.
  When you turn this button **ON** a message will pop up to explain what the password will be if you need to access Settings and change any options.

- **Choose Enterprise Type:** If you also wish to use this app for your Landscaping Business you can select Landscaping. When you return to Settings the 'Questions on log' now pertain to Landscaping and can be edited to suit your needs.

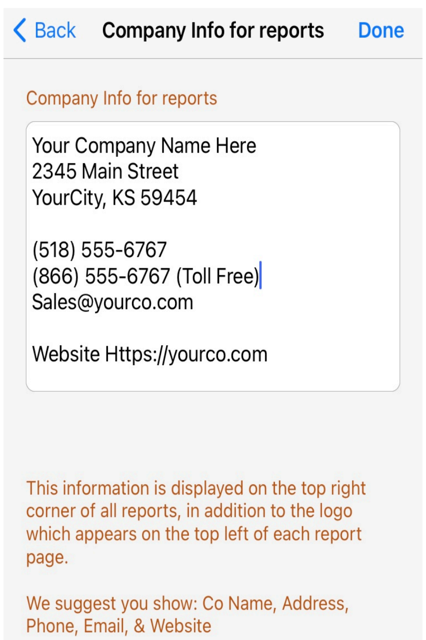
COMPANY LOGO FOR REPORTS:

Load your custom logo by following the instructions shown.



COMPANY INFO FOR REPORTS:

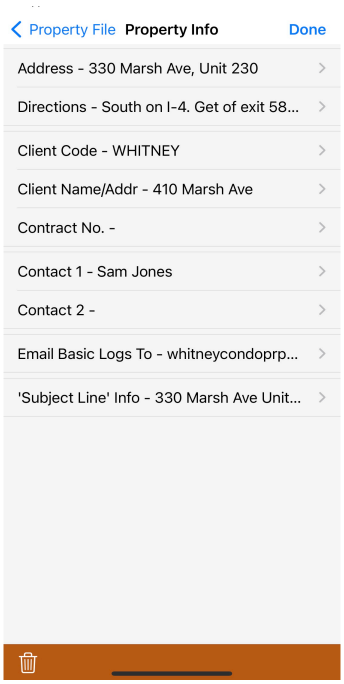
This information is displayed on the top right corner of all reports, in addition to the logo which appears on the top left of each report page.



We suggest you show Company Name, Address, Phone, Email, a and Website.

PROPERTY FILE:

Tap ‘Property File’ on the Home Screen then tap the + sign to enter a new property and enter the following information:



- **Address:** Enter the property address, or the name of the building where you have a contract.

- **Directions:** you can write down directions to find the property.

- **Client Code:** If you have a client with several properties, make up a unique ‘client code’ & give each property this client code. Later, when running Reports, you can just enter the Client Code in the ‘Select Prop’s w. Client code’ field, press enter, and a check mark will be entered next to each of those properties with that code.

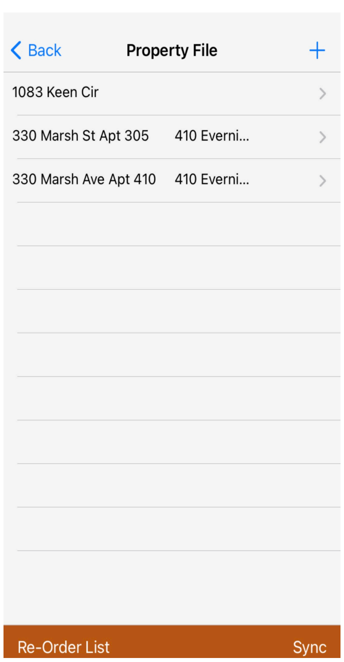
- **Client Name/Addr:**
  If you wish, enter the property owner /client name.

- **Contract No.:** Enter contract number if applicable.

- **Contact 1 & 2:** You can put down information on 2 contacts in case you need to contact the property owner about a problem or issue. There is room for a name, address and several telephone numbers here.

- **Email Basic Logs to:**
  Enter a valid email address for the client.

- **Subject Line’ Info:** Configure email subject line if you wish to better identify property report being sent.



- **Re-Order List:**
  Once you have entered all your properties you can arrange them according to your daily route. Select ‘Re-Order List’ to arrange the properties and then Tap and HOLD the  button and slide your finger up or down to put them in order of your route. When finished tap **End Re-Order.**

- **Sync:**
  When you tap **‘Sync’** it will create an email with a data file attached from your device and can be sent to another iPhone with mpengo Snow app. When the email is opened, tap on the attachment and select mpengoSnow. The SYNC will update the Settings and the Property file.
  NOTE: Fields **NOT** included when Syncing Settings:
- Contact Name, Contact Email, Contact Phone
- Default Operator
- More Settings Options
- Company Logo

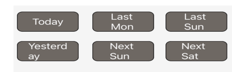
**The above fields will need to be manually set up on each device.

DAILY LOGS:

Here's the general sequence:

- Tap Property File. Tap **Re-Order List** then tap and HOLD the  button and slide your finger up or down to put them in order. When finished tap on **End Re-order.**

- Tap **Daily Logs**. The first time each day, you need to tap 'Date' and declare it; afterwards (that day), it will default to that date unless you change it, and then that's the default now for the remainder of the day. You also have some quick buttons that will set the calendar to that date:



- If the date is wrong, tap Date, change it and tap Done.

- Tap **Add New Log**, and pick the property you just cleared.

- Confirm the property by looking at the address and directions at the bottom, and tap Proceed

- Look at **Time In / Time Out**, correct if necessary and tap Done.

- Entry is broken into **3 sections**: **General, Service, and Equipment**. Tap the **section** you want to fill in, and indicate the value of information and tap Done.

- Tap the **Camera icon** to take photos. You have up to 10 (depending on your settings. Default is 5) available spots to store a picture: tap an 'available' line, tap the camera button to take the picture, tap 'Use Photo' to accept the picture, and then tap 'Save' or 'Re-Take' (If you wish to Discard the photo it must be saved first and then go back into that photo and select Discard to delete it).

- If using the **Billing Module** tap on **'Billing Details for this Log'** and enter the information (See page 2 and 3 for more information on the Billing Module and how to use).

HELPFUL TIPS:

- When you enter the next log for that day your Snowfall, Temperature, and Weather remarks default to your entries from the previous log to save time. Of course, you can still change these if they are not correct.

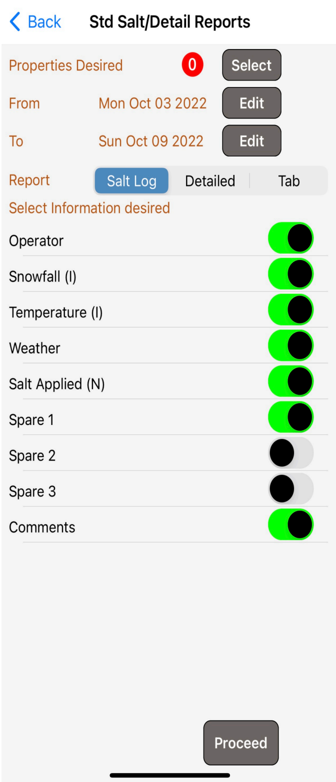
- If for some reason you need to save this log but not lock it, you can tap **'<Daily Logs'** at the top left instead of **Save & Lock** or tap the **HOME (house)** button at the bottom. This will keep the log open and take you back to the main menu. When ready to Save & Lock just tap an OPEN log.

- When you **'Send Log Reports to Clients and HO'**, if there is an open log for the property and date range you selected, it will Save and Close the call when the email is sent.

- Once a log is **'saved & locked'**, it can no longer be edited, deleted, or otherwise tampered with. This is to give some level of peace of mind to your property owner that there was no way you could have tampered with the original log.

- If you are using the **Billings Module** and did not enter billing details on your Log before it was Saved and Locked, you can add them in the 'Enter/View Billing Details'. Just pull up the property and date of the log and enter your billing details. (Once a log is erased you cannot add billing details.)

STD. SALT & DETAILED REPORTS:



You can run Reports as often as you wish. Indicate the date range, properties and information desired. You can indicate whether you wish a Salt Log (or Basic Log if your Enterprise is set to Landscaping), Detailed Report or Tab.
NOTE: *Report dates default to the previous Monday to Sunday as the date range for the report, so if you record a log for Today, and jump immediately to Reports without looking at the dates, of course, it will miss Today!* ***LOL***

Properties Desired: Tap to select the properties. If you have multiple properties with the same Client Code and wish to select them all, then enter the Client Code at the top of the screen and press return. This will put a checkmark next to all those properties with the same client code. Press Done when finished and then select a Date Range for your Report.

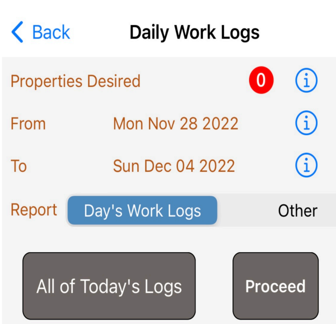
Salt Log is a report of each visit, with dates, times, and the information requested. The emails will be sent to the email address in the property file.

Detailed Report has one page per visit. If you choose **NOT** to include photos you can select multiple properties and these will be sent to the email address in the property files. With photos included, you can select only one property and this sends the email to the email address in Settings.

Tab sends a tab file of the logs to the email of your choice. (Note: there is no option to select the information desired as it is designed to include all info except photos).
When you run a Report, the settings you used are stored in memory for next time, so you don't have to tap ON/OFF all over again. The reports also have an option to **Print** or **Email**. (Note: Red badge shows the number of properties selected).

DAY'S WORK LOGS:

Run reports by selecting Properties and date range and tap Proceed.
If you only wish to see Todays Logs there is no need to select properties, just tap on 'All of Today's Logs' to view report and email or print.



Daily, Weekly, or Periodically: Send Log Reports to Clients & H.O. (if Auto Email is OFF)

Keep in mind that the iPhone (and the iPad to a smaller degree) has limited memory capacity. Don't use your device for complete historical storage of every job you did: instead, offload the logs and pictures to your home laptop or desktop computer.

Again, the app suggests that you 'Send Log Reports to Clients & H.O.' of your completed logs for the previous week (Monday to Sunday).

Or go to Settings - More Settings and set your 'Auto Email Log' to On to have them automatically email the log as soon as you Save & Lock.

Housekeeping (Erase 'Sent' Logs)

Again, because your device can't hold logs and pictures forever, once you've uploaded them to your laptop or main business computer for safekeeping and run any reports, you can erase them here.

A good suggestion to follow is to perhaps erase them once a month, for the month previous. If you clear 10 properties a day, and there are 12 snow days in the month, and you take 5 pictures each time, you are using up 10 x 12 x 5 x 160kb = 96 meg of device memory a month: not a lot, but something to consider. And forcing Snow to keep track of 120 logs and 600 pictures is okay, but more and more logs will eventually slow the app down…
So, if this is Feb 1, we suggest you Erase 'Sent' Logs that are **older** than Jan 1, and so on.

Other Information

A note on Memory: you may encounter memory limitations on your iPhone or iPad (most devices 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, 64GB, or 128 GB … storage that you purchased with your iPad - that is data storage).

In general, when an app is no longer visible it will not be using any memory on the device. This is sometimes referred to as moving an app to the background but in fact, most apps are actually suspended and removed from memory. An exception to this statement is an app that is performing an activity in the background such as a navigation app.

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

Backups: Remember it is VERY important to backup your iPhone or iPad to your COMPUTER, (not just the cloud), on a regular basis when connecting to iTunes. A very valuable safety consideration: say, if someone drops a phone or iPad in the snow, and puts it out of commission!

Downloading mpengo Snow on the iPad:

mpengo Snow can also be run on the iPad. When you are in the App Store on the iPad search for mpengo Snow. If it doesn't show the app then tap on 'Filters' and then tap on 'Supports' and select **iPhone Only** and press Done. This will then display mpengo Snow and you will be able to download Snow to your iPad.

If the app is not full screen when opened, just tap on the button  in the lower right corner to increase to full screen.

If you have questions:

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 & 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.

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 send us your suggestions!

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