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Joblogic Mobile User Guide

This guide is currently being updated. We will have the full guide out to you as soon as possible!

Introduction

Joblogic Mobile allows real-time communication between the engineer and the office. It allows jobs, updates, notes, certificates and attachments to be viewed and used instantly.

This guide will provide step by step instructions to help you in getting started with the Joblogic mobile app, including how to log in and how to utilise the various features.

Getting Started

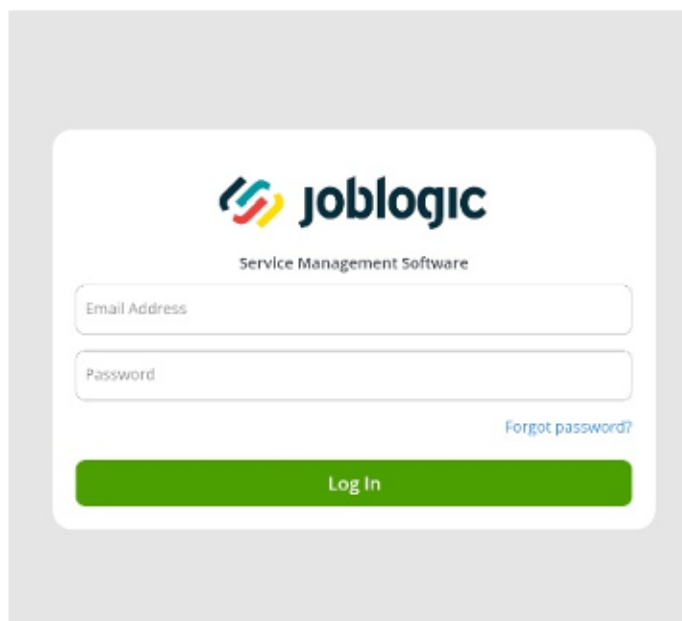
The Joblogic mobile app can be easily downloaded and installed from both the Android and Apple app stores.

- For Android devices, use the Google Play Store to download the 'Joblogic' Mobile app
- For IOS devices, use the Apple App Store to download the 'Joblogic' Mobile app

Once the Joblogic Mobile app is downloaded and installed from the store, you will be presented with the login screen as you open the app.

Logging In and Setting Up

To login and use the app, enter the Email Address and Password that has been setup in your Joblogic system. When you are happy that these are correct, select the **Log In** button.

The image shows the login screen of the Joblogic Mobile app. At the top, there is the Joblogic logo, which consists of a stylized 'J' made of three colored segments (blue, yellow, and red) followed by the word 'joblogic' in a dark blue sans-serif font. Below the logo, the text 'Service Management Software' is displayed in a smaller, grey font. There are two input fields: the first is labeled 'Email Address' and the second is labeled 'Password'. To the right of the password field, there is a link that says 'Forgot password?'. At the bottom of the form, there is a large green button with the text 'Log In' in white.

You'll then be presented with a couple of prompts to Enable / Set up as required:

1. Low Power Mode

Low Power Mode

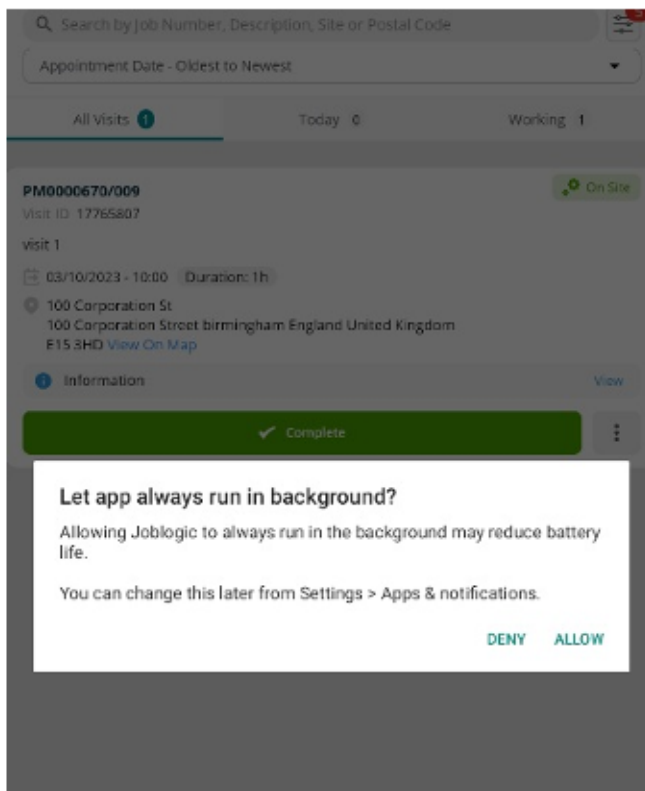
The Joblogic app is currently set to 'Low Power Mode', this may prevent notifications from being displayed when the application is working in the background. To enable notifications, please tap on the Enable button below

ENABLE

NO THANKS

2. Let app always run in background?

Allowing the Joblogic app to run permanently in the background will ensure the app receives jobs on time and all mobile updates get sent to the back office whilst your device is online.



3. Enable Overlay Setting

Enable Overlay Setting

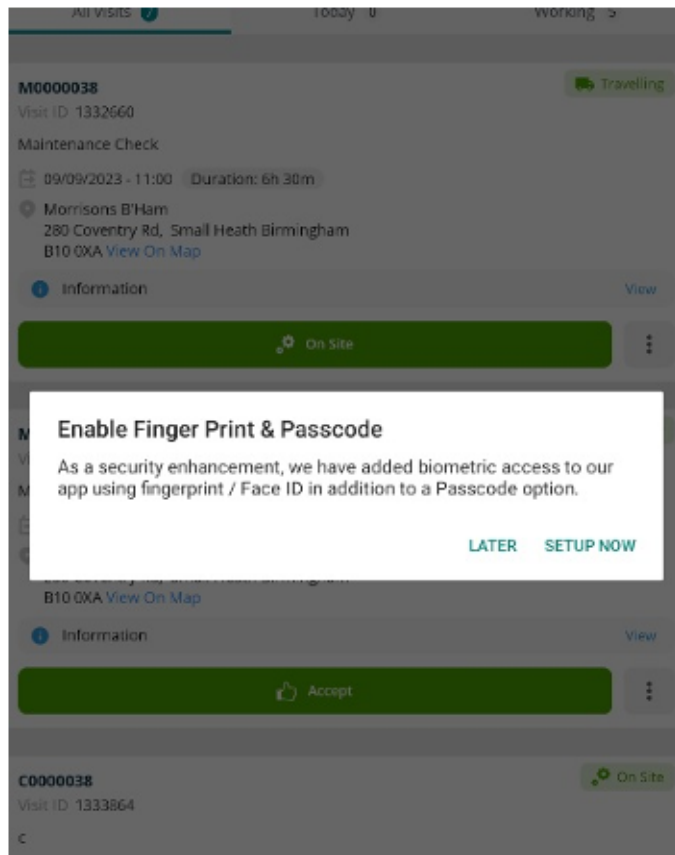
To enhance, functionality, kindly grant this app permission to overlay other apps. This will enable it to detect your touch interactions and make necessary modifications to the displayed content

ENABLE

NO THANKS

4. Enable Fingerprint & Passcode

Choosing "Setup Now" will allow you to toggle on "Touch ID/Face ID" and/or your Passcode. You will then be able to log in via Touch ID (Android) or Face ID (Apple) the next time you log into the Joblogic app.



[<](#)

Finger Print & Passcode

Fingerprint

☐

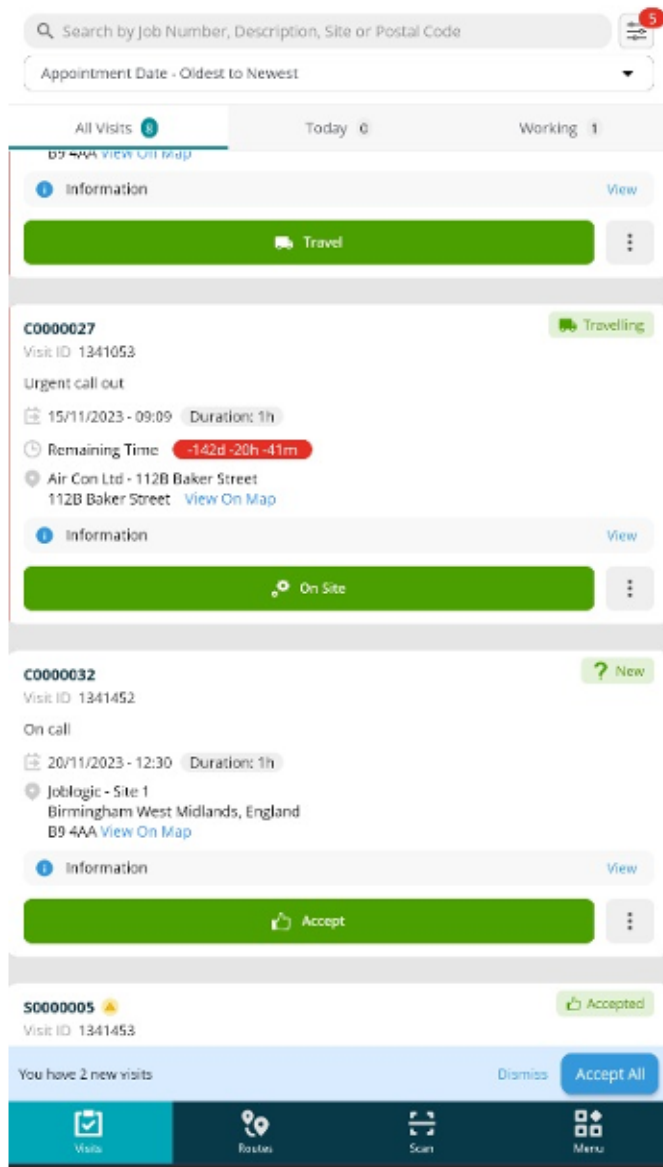
Passcode

[>](#)

Visits

Visit List

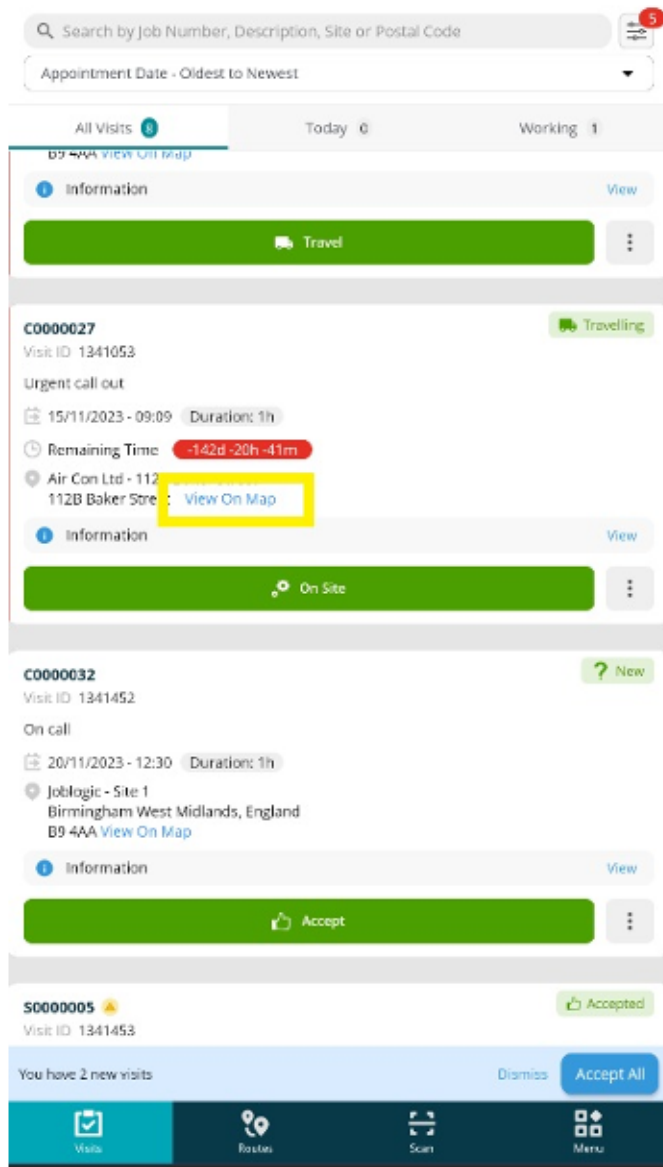
Once you have logged in, you'll be taken to your **Visits** homepage. Here, you can view all of the jobs that have currently been deployed to you and are ready to be worked on.



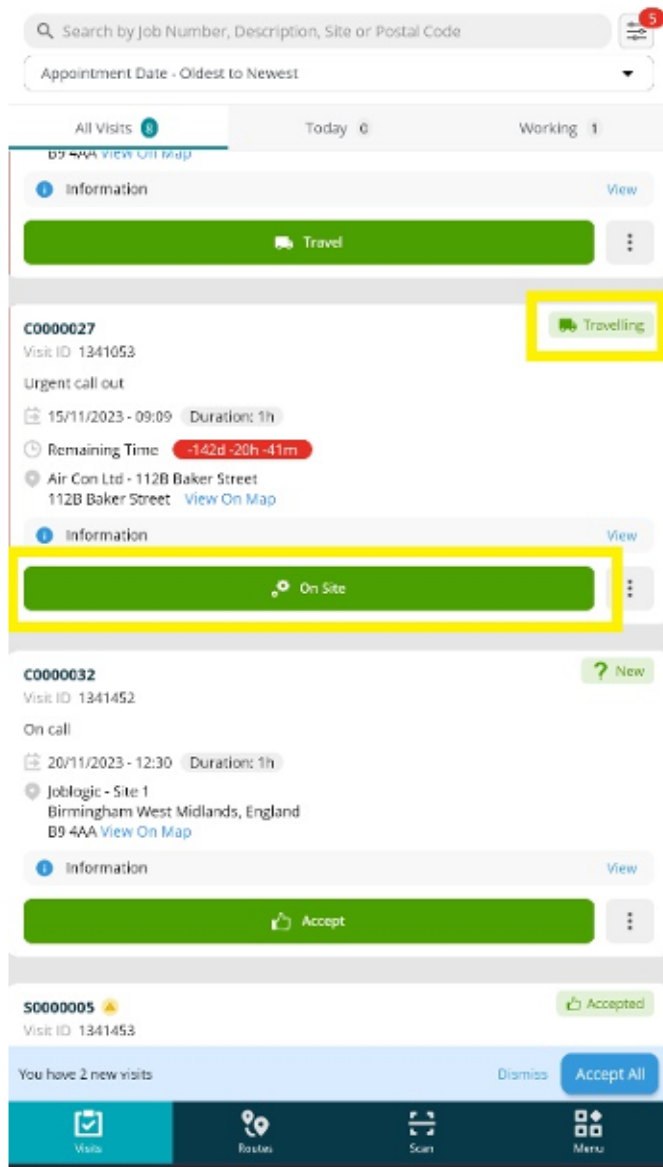
You'll be able to see the initial information for the job on each card, such as Job Number, Description, Date & Time and Address details.

Next to the Address, you'll see a **View On Map** link, which will take you to the map and show you the route from where you currently are.

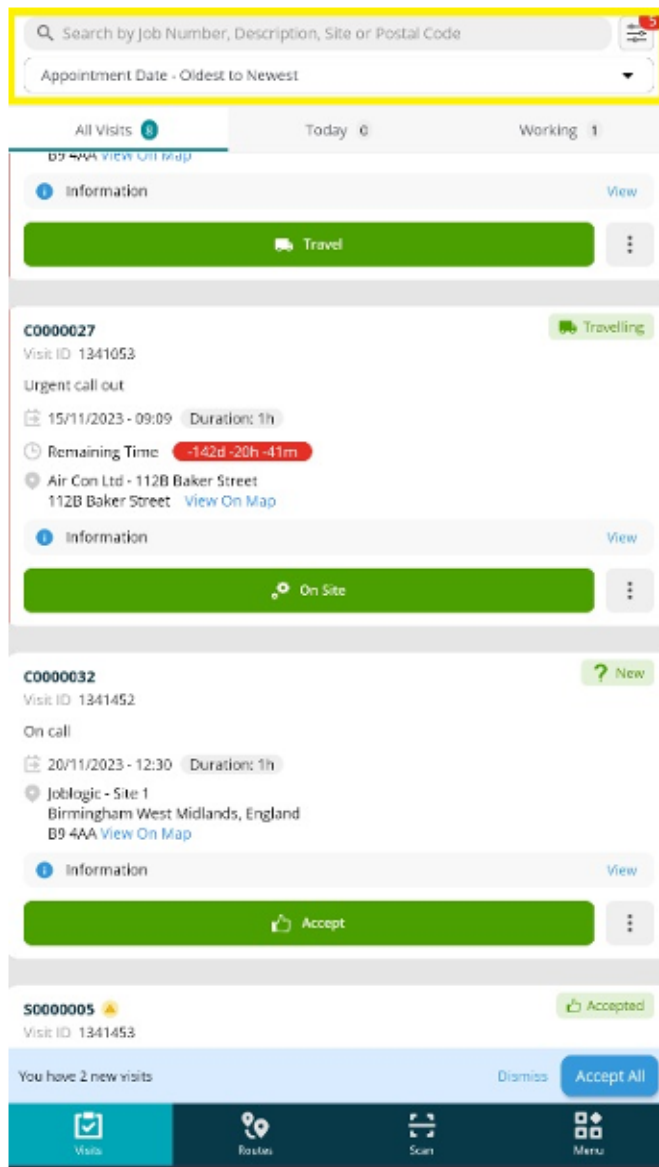
This will only work if you have signal, and the address is set up correctly.



The **Status** of the job will be shown in the top right, and the next available status will be marked by the green button along the bottom. You can click on this and change the status from this screen if preferred, however it is ideal to click into the Visit to view more details to work on the job.



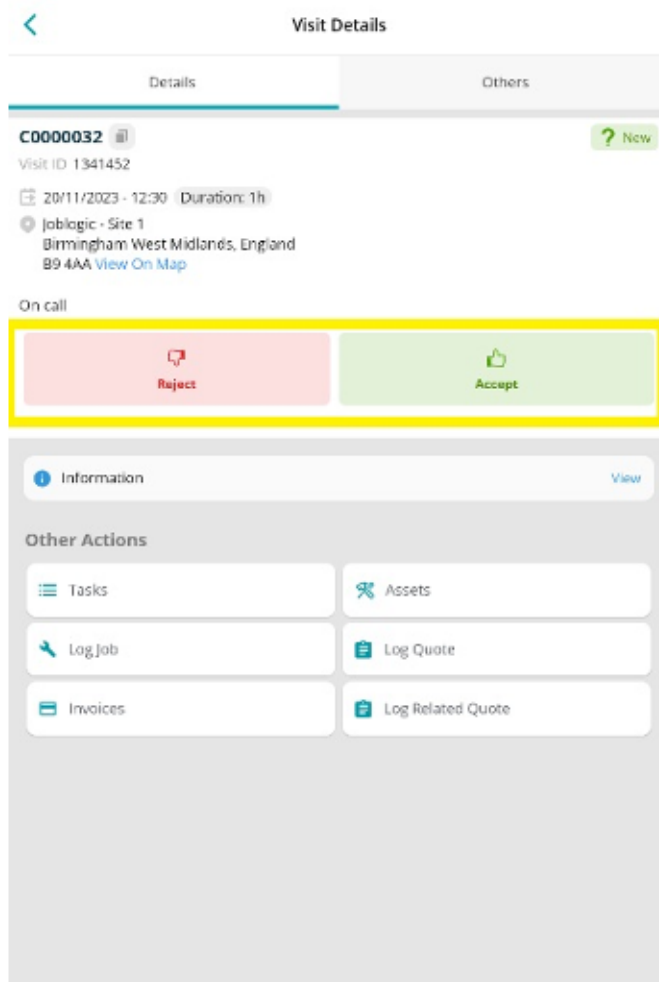
You may wish to use the **Search** and **Filters** at the top of the screen to find a particular job if you have a large list.



Visit Details - Details tab

Clicking on the white space within the job card will take you to the **Visit Details** screen.

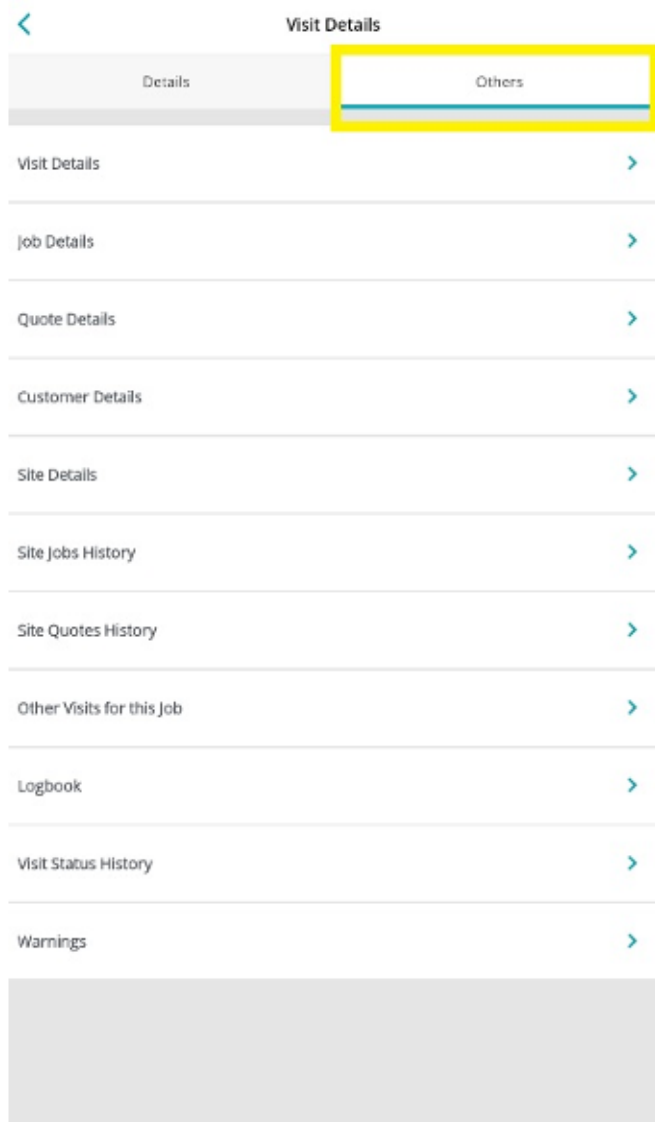
The top of the page will be the same as the main card you saw on the Visit List page, but with further status actions, such as **Reject**. More information can be found on these Statuses and the job flow below.



Below this, there are **Other Actions**. More will become available as you click through the job statuses and are discussed in detail further on in this guide.

Visit Details - Others tab

This section will provide you with all additional information you may require, such as full Job Details, Site Job History and Warnings.



Job Flow and Status Updates

Accept

- You can accept the job by clicking the green **Accept** button from this Visit Details or the Visits home screen. Clicking through the statuses will update the Planner and Job in the back office.
- The **Visit Action – Accept** screen will appear, and by clicking “Accept Visit” at the bottom of the screen you will be taken back to the Visit Details screen.

from the dropdown and then click Reject Visit.

Visit Details

Details

Others

PM0000002/001

Visit ID 1341454

21/11/2023 - 12:59 | Duration: 30m

Joblogix - Site 1
Birmingham West Midlands, England
B9 4AA [View On Map](#)

Text

Reject

Accept

Information

View

Other Actions

Tasks

Log Job

Invoices

Assets

Log Quote

Log Related Quote

Visit Action - Reject

PM0000002/001

Visit ID 1341454

Current Status

Accepted

Current Status Date

20/11/2023 - 15:22

New Status

Reject

New Status Date

24/11/2023 - 09:35

Reject Reason

Select an option...

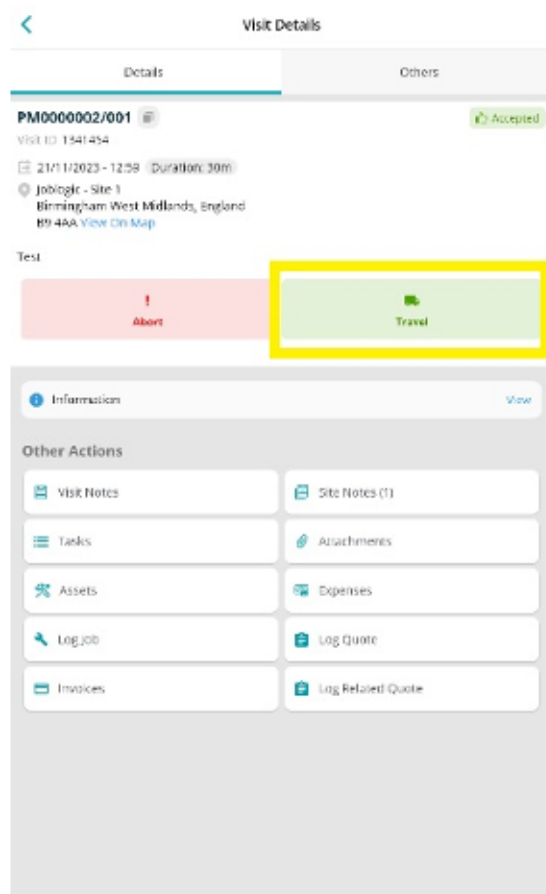
Cancel

Reject Visit

Travel

Page: 12 of 28

- On the day of the job, and when are are ready to start your journey, click the green **Travel** button.
- The **Visit Action – Travel** screen will appear to allow you to confirm the **New Status Date**, and then click **Travel To Site**. You'll then be redirected to the main Visit page.



Visit Action - Travel

PM0000002/001 Visit ID: 1311451

Current Status

Accepted

Current Status Date

24/11/2023 - 09:37

New Status

Travel

New Status Date

24/11/2023 - 09:40

Cancel

Travel To Site

Abort

- If you wish to abort the job at this stage, choose the **Abort** status option.
- A **Reason** must be provided and will be relayed to the back-office users.

Visit Details

Details

Others

PM0000002/001

Accepted

Visit ID: 1341454

21/11/2023 - 12:59 | Duration: 30m

Joblogix - Site 1

Birmingham West Midlands, England

B9 4SA [View On Map](#)

Text

Abort

Travel

Information

View

Other Actions

Visit Notes

Site Notes (1)

Tasks

Attachments

Assets

Expenses

Log Job

Log Quote

Invoices


Log Related Quote

Visit Action - Abort

PM0000002/001

Visit ID: 1341454


Current Status

 Accepted

Current Status Date

24/11/2023 - 09:37

New Status

 Abort Visit

New Status Date

24/11/2023 - 09:41

Abort Reason

Select an option...

Cancel

Abort Visit

Now you are travelling to the job the additional buttons **Abandon** and **No Access** are available based on your permissions. You can also **Abort** at this stage too, as above.

Visit Details

Details Others

PM0000002/001

Visit ID: 1341454

21/11/2023 - 12:59 Duration: 30m

Joblogix - Site 1
Birmingham West Midlands, England
B9 4SA [View On Map](#)

Test

Information [View](#)

Other Actions


Visit Notes	Site Notes (1)
Tasks	Attachments
Assets	Expenses
Log Job	Log Quote
Invoices	Log Related Quote

Abandon


- You can choose the **Abandon** status if you are unable to continue.
- Again, you will need to enter a **Reason** and then click **Abandon** at the bottom of the page.
- This will log a Revisit Required request.

Visit Action - Abandon


PM0000002/001 Visit ID: 1341451

Current Status	Current Status Date
 Traveling	24/11/2023 - 09:42

New Status

 Abandon Travel

New Status Date

24/11/2023 - 09:44 

Abandon Travel Reason

Select an option...

Cancel

Abandon

No Access

- You may use this option if Access has not been provided by the customer; this also logs the need for a revisit to the job.
- A **Reason** for the no access must be provided.

Visit Action - No Access

PMDC00002/001

Visit ID: 1341454

Current Status

Traveling

Current Status Date

24/11/2023 - 09:42

New Status

No Access

New Status Date

24/11/2023 - 09:44

No Access Reason

Please type the reason

Cancel

No Access

On Site

- When you have arrived at your destination, click **On Site**.
- You'll be taken to the **Visit Action – On Site** page where you can check over your details, including your **Mileage** and then click **Save**.

Information
View

Other Actions

Visit Notes

Tasks

Assets

Log Job

Invoices

Site Notes (1)

Attachments


Expenses

Log Quote


Log Related Quote

PM00000002/001

Visit ID: 1341454


Current Status	Current Status Date
 Travelling	24/11/2023 - 09:42

New Status

 On Site

New Status Date

24/11/2023 - 09:46



Mileage

0

Cancel

Save

Now that you are on On Site, you'll have a few status options.

Visit Details

Details Mobile Forms Others

PM0000002/001

Visit ID: 1341454 On Site

24/11/2023 - 09:46 Duration: 30m

Joblogic - Site 1
Birmingham West Midlands, England
B9 4AA [View On Map](#)

Test

Abort **Leave Site** **No Access**

Complete

Information [View](#)

Other Actions

Visit Notes Site Notes (1)

Tasks Attachments

Assets Expenses

Parts Log Job

Log Quote Invoices

Log Related Quote

Again, you can **Abort** or mark as **No Access** at this stage (permission allowing)

Alternatively, you have the option to **Leave Site**.

Leave Site

- This should be used if you ever need to **PAUSE** the job. Leaving site will revert that status back to 'Accepted' so that you can start it up again at a later time/date.
- For example, you may need to go and collect some parts, in this case you would **Leave Site** and then start travelling back again when you are ready.

Visit Action - Leave Site 1/3

PM0000002/001 Visit ID: 1341454

Current Status

On Site

Current Status Date

24/11/2023 - 09:46

New Status

Leave Site

New Status Date

24/11/2023 - 09:54

Leave Site Reason

select an option...

Cancel

Continue

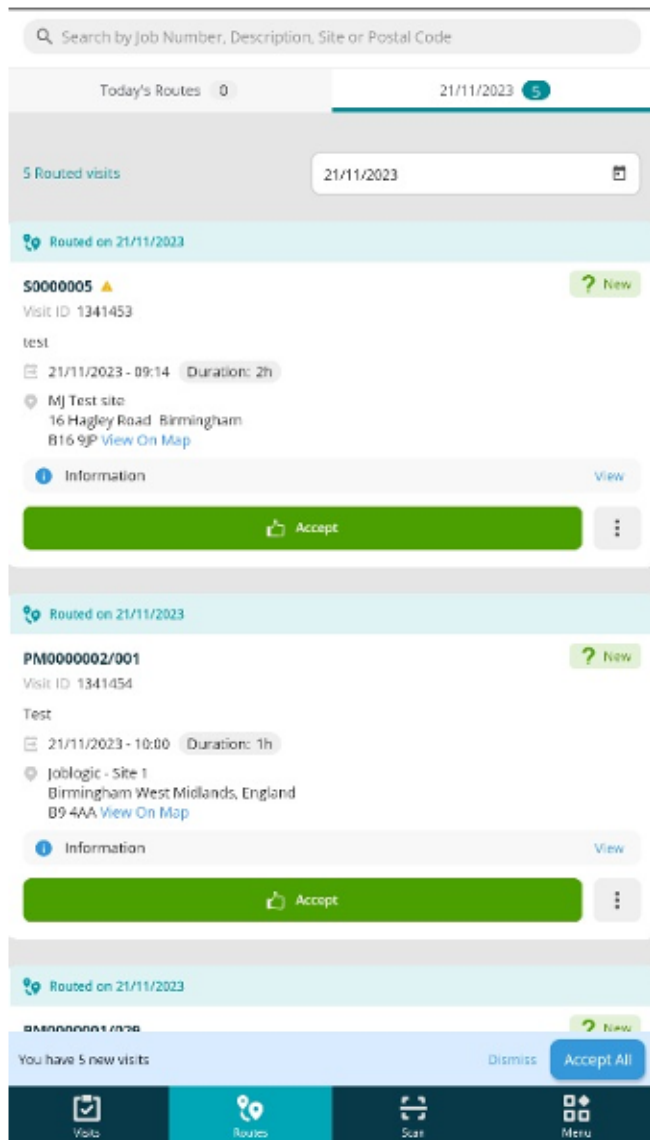
Routes

The second option allows you to view your optimised Route as set by the back-office staff courtesy of Joblogic's Route Scheduler.

To read more about setting up the Route via the back office, click [here](#).

This section will only show data if a back-office staff member has deployed a route to you via the Planner.

You will work on your jobs in the same way as usual, however this time there is an optimised order for you.

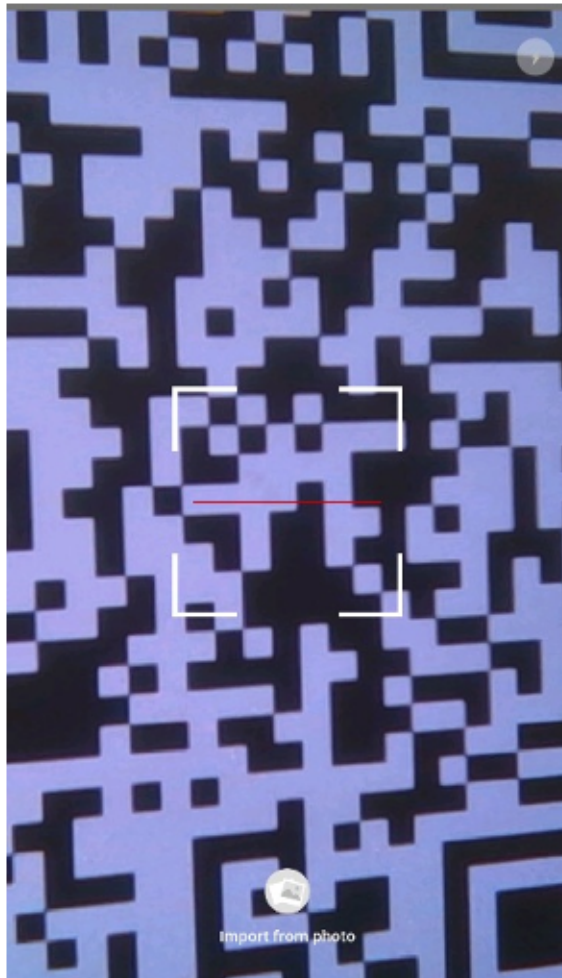


Scan

The **Scan** option can be used to search for your Joblogic Assets via QR Codes or Bar Codes.

Clicking the Scan button will open your Camera ready for instant scanning. Next, scan the QR / Bar Code you have, and it should bring through the relevant Asset details.

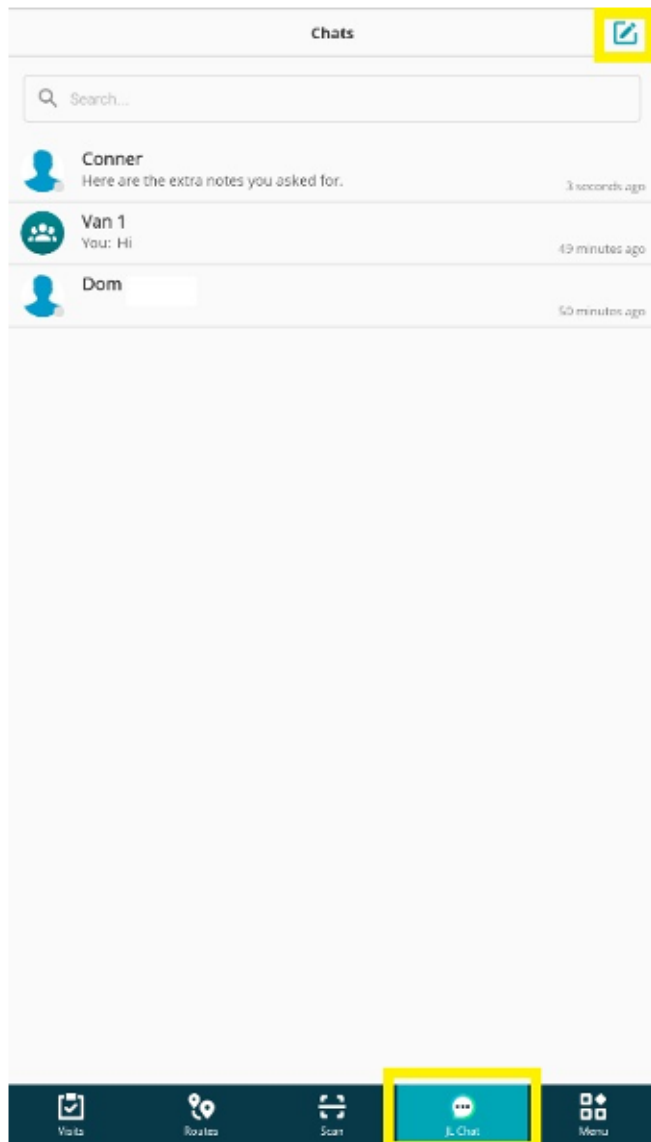
If the code does not exist or has not been set up in Joblogic yet, it won't allow you to search.

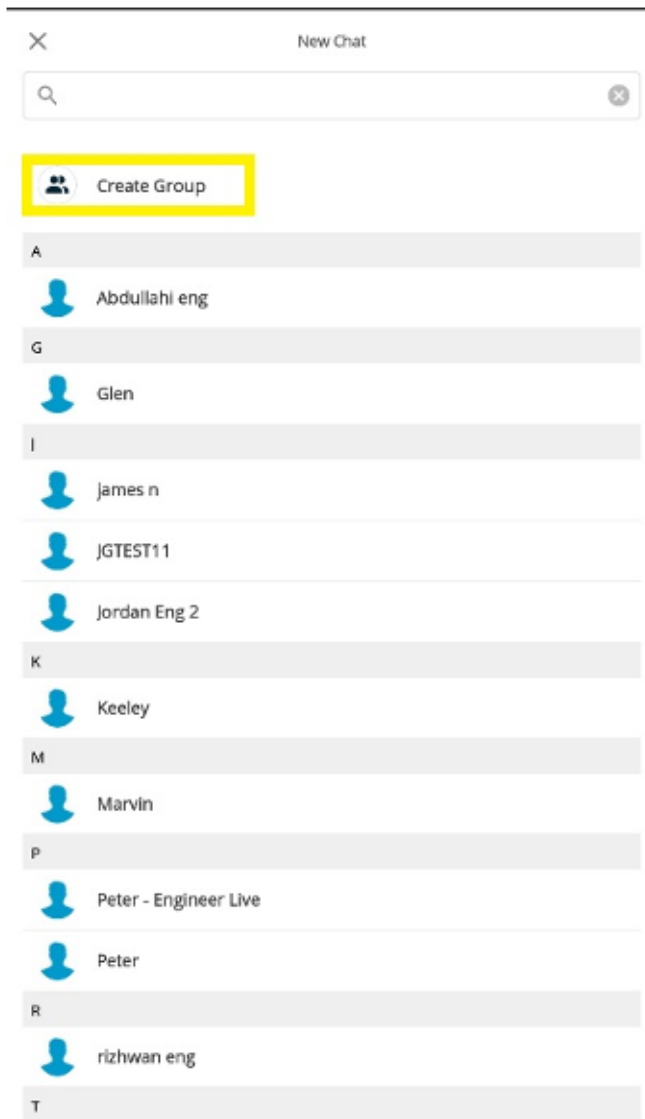


JL Chat

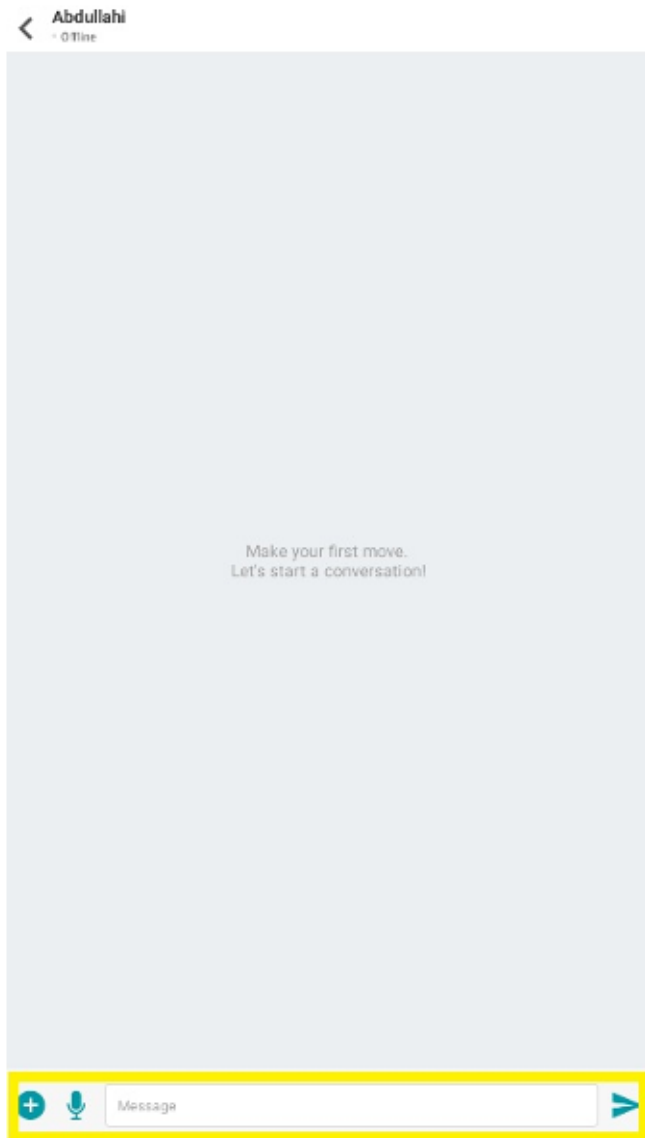
The next option along, is the **JL Chat** function. This is an internal messaging service that you can use to communicate with the back-office team and other engineers.

To start a new chat, click the pen and paper icon at the top of the screen. This will show you a list of everyone in your team that you can start a chat with. You will also notice you can start group chats here if you wish.





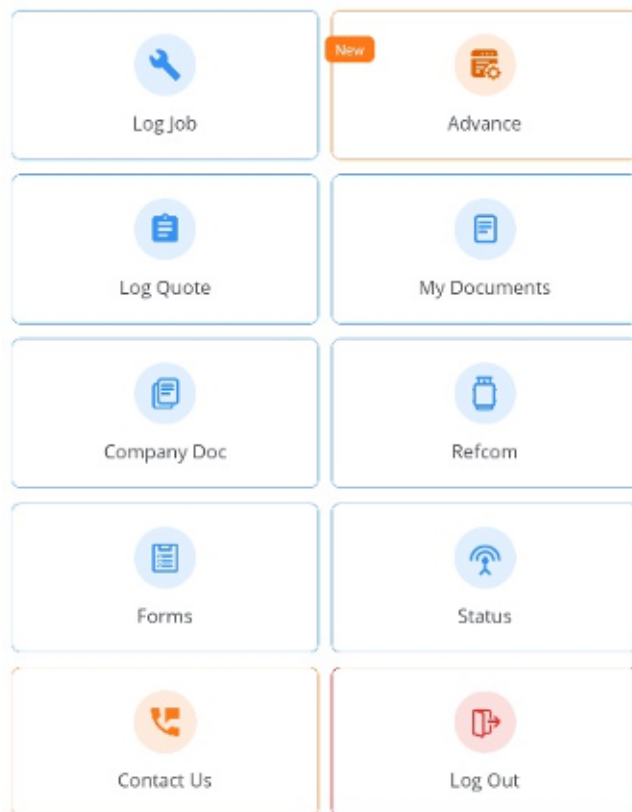
Click on a name to open the messaging service so you can start sending written messages, attachments, or voice notes. If someone sends you a message, you will receive a notification, just like you do when you receive a new job on the app.



Menu

And finally, it's your main **Menu** with various useful tools and features.

Some of the below items are permission based, so you may not have access to all of them unless your colleagues in the back office have turned them on for you via Settings > Staff.



Log Job

- Log Job is permission based but it will allow you to log your own jobs on the mobile app while out on site.
- When logging these jobs, it will ask for the job detail and finally who you want to assign the job to.
- By default, it will be yourself and once you press save the job will automatically send back to you so you can start work on it as normal.

Advance

- The Advance feature allows you to utilise more of the back-office functionality, but on your mobile app, while out and about, if you have the relevant permissions.
- You currently have access to Customers, Sites, Quotes, Assets, Invoices and Supplier Purchase Orders, with more to be added soon!

Log Quote

- You may also be able to raise Quotes on the mobile app whilst you are on site.
- Please note that you are unable to add any monetary values within this feature.
- This will simply create a basic quote for further works, that is then sent to the back office for completion.

My Documents

- Your team in the back office may have uploaded some useful documents to your account in the back office, such as your ID, qualifications and certifications.
- If they have, then this is where you can come to view and download them.
- Very useful if you ever need to show these documents whilst you are on site.

Company Docs

- Like the above 'My documents' your team in the office may have also uploaded global company documents for you to view on the mobile app.
- If so, this is where you can come to preview/download them.

Refcom

- If the Refcom module is useful to your business, and is enabled, you'll have a Refcom option here.
- Within this section you can add, view and Collect/Return Cylinders, as well as checking the refcom audit.

Forms

- Here you can view all forms that are marked as General forms, not Job Forms. They can be clicked on and filled in as normal from this screen.

Status

- There are a few useful sections on this page. You can check if your app is up to date, amend certain settings if you wish, and you can also check the connectivity status of our services.
- You also have the ability to fetch the latest updates for library data or do a manual Sync if ever required. However, the app should be doing this automatically anyway.

Contact Us

- You can speak with the Joblogic support team through the Contact Us section. You have 2 options here – Live Chat or Direct Call.

Log Out

- As simple as it looks – click here to log out of the app.

Further Support

For further information or assistance on the above, contact our Support Team on 0800 326 5561 or email support@joblogic.com. Alternatively, our Customer Success Management team can be reached by emailing accountmanager@joblogic.com.

Publishing Details

This document was written and produced by Joblogic's Technical Writing team and was last updated on the date specified above. Be aware that the information provided may be subject to change following further updates on the matter becoming available. Additionally, details within the guide may vary depending on your Joblogic account's user permissions.