



# Mobile Field Technician Console Set-up Guide

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# Mobile Field Technician Console Setup Guide

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## Prerequisites

The set-up procedure outlined in this document is based on a standard installation of Miracle Service™ software and a typical Microsoft® computer system environment.

See full System Requirements here:

<http://www.miracleservice.com/product-features/system-requirements/>

## Configure Technician Logins in Miracle Service

Your technician logins must be configured in order to give them access to the Mobile Field Technician Console. This is done in the Miracle Service Administration program > button 13. Administration > Security.

**Roles:** There are two default standard roles which are dedicated to the Mobile Field Technician Console, which are:

- **Mobile Field Technician admin logins** - typically used by supervisors as this level grants the user access to all jobs open for all technicians in the Group Region.

Review the permissions assigned to this role and make any required adjustments based on your company's needs and preferences.

- **Mobile Field Technician standard logins** - this is the standard login typically granted to all technicians to access only jobs assigned to them.

Review the permissions assigned to this role and make any required adjustments based on your company's needs and preferences.

**Logins:** The Logins screen is a listing of all individual users with some level of permission to access Miracle Service modules. The users' actual permission is based on the Roles they are assigned.

Double-click to open an existing login, or click "Add New" to add a new user.

Ensure that the login is defined as a technician by clicking the drop down to link the user login to their technician profile. This now becomes the login for this technician for the Mobile Field Technician Console. *See screenshot on next page.*

Select the Roles for this user by checking the box beside the Login Roles item in the list. One of the two available Mobile Field Technician roles must be checked off.

*How to configure the technician login:*

The screenshot shows the 'Login Security' configuration window. The 'Login Name' field contains 'scott' and the 'Password' field is masked with asterisks. The 'Technician' dropdown menu is set to 'Scott Davis', the 'Email' field contains 'sdavis@demo.com', and the 'Region Group' dropdown is set to 'All'. Under the 'Login Type' section, the 'User' radio button is selected. The 'Login Roles' table is as follows:

Role	Checked
Contract Administrator	<input type="checkbox"/>
Inventory	<input type="checkbox"/>
Mobile Field Technician admin logins	<input type="checkbox"/>
Mobile Field Technician standard logins	<input checked="" type="checkbox"/>
Sales	<input type="checkbox"/>
Service	<input type="checkbox"/>

Buttons at the bottom include 'Delete', 'Ok', 'Cancel', 'Select All', and 'Deselect All'.

## Installation

**New Customers:** If you have paid for installation of the Mobile Field Technician Console, then Nexent will do the installation for you when Miracle Service is installed. Please contact your Miracle Service Implementation Coordinator for scheduling.

**Current Customers:** If you are upgrading from a previous Wireless or Technician Web Portal, installation will be done automatically when running the '**MSWeb Installer**' during your Miracle Service upgrade.

# Login to the Administration Area

Login with the User Name "WebAdmin" and the password provided to you at installation.

The login path will be: **http://xxxxx.xxxxxxx/MSWeb/#/login**, where the X's represent your external IP address or DNS.

For Upgrading Customers Only - When upgrading from a previous v9 (or earlier) Wireless or Technician Web Portal, your new login path will be as follows:

Old Login: <http://xxxxx.xxxxxxx/miracleservice/technicianportal/desktop/login.asp>

New Login: <http://xxxxx.xxxxxxx/MSWeb/#/login>

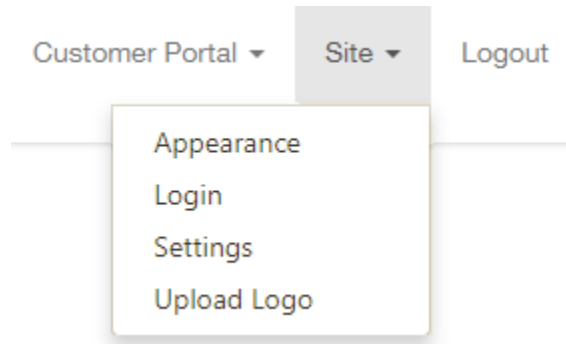
**\*We recommend that you change the default WebAdmin password** by going to the main Miracle Service Administration application tab 13. Administration > Security > Logins, and double-click on the WebAdmin login to change the password.

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Simplified Service Management

# Site Menu Settings

From the menu bar located in the top-right area of your screen, select the "Site" menu.



## Site / Login

From the "Site" menu option, select "Login".

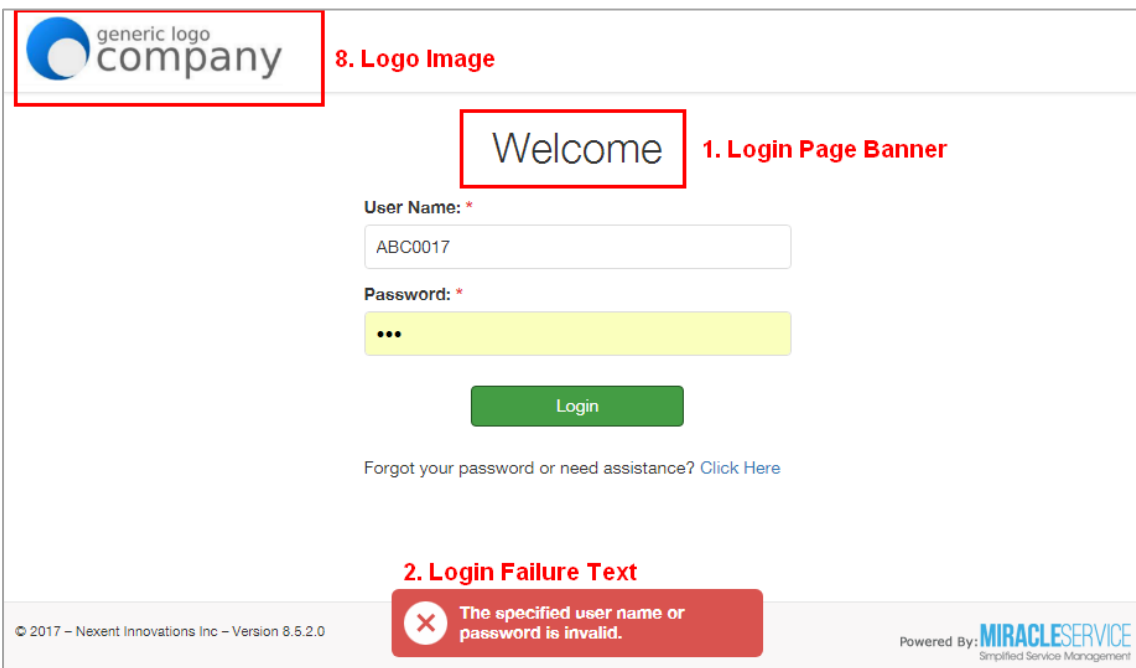
### 1. Login Page Banner:

This is the greeting message that will appear on top of the Login page.

### 2. Login Failure Text:

This is the message that will appear if the user attempts to login with an invalid user name and password.

*What the user sees:*



### 3. Assistance Form Banner:

If a user has clicked on the link on the login screen for assistance with a lost password, this is the heading that will appear at the top of the pop-up login assistance form.

### 4. Assistance Form Content:

If a user has clicked on the link on the login screen for assistance with a lost password, this is the content that will appear on login assistance form.

### 5. Login Assistance Field 1 \*Mandatory field:

This is the first field that the user will have to complete when requesting assistance for a lost/forgotten password. As this field is mandatory for the user, reserve this for most important information that you are requesting from the user.

### 6. Login Assistance Field 2-5:

These are additional fields that you would like the user to complete when requesting assistance for a lost/forgotten password.

*What the user sees:*

The screenshot shows a 'Login Assistance' form for 'generic logo company'. The form is titled 'Login Assistance' and contains the following elements:

- 3. Assistance Form Banner:** A red box highlights the title 'Login Assistance'.
- 4. Assistance Form Content:** A red box highlights the message: 'Sorry you are having trouble accessing the portal. Please provide the following information so we can help you out.'
- 5. Login Assistance Field 1:** A red box highlights the first input field, labeled 'Enter your Email: \*'.
- 6. Login Assistance Fields 2-5:** A red box highlights the remaining three input fields: 'Enter your Company Name:', 'Enter your User Name:', and an unlabeled field.

At the bottom right of the form are 'Close' and 'Submit' buttons. The footer of the page reads '© 2017 - Nexent Innovations Inc - Version 8.5.2.0' and 'MIRACLE'.

## Site / Appearance

From the "Site" menu option, select "Appearance".

### **Theme Name**

The Mobile Field Technician Console comes with several color theme options for you to choose from. The default theme is Blue, however if preferred, you can select an alternate theme which better matches your company branding. As you are currently logged in, you will need to press F5 on your browser to refresh your screen to see the new theme reflected.

### **Date & Time Formats**

Select from the drop-down options to set how the date and time should appear.

### **Currency Symbol**

Select from the drop-down options to set the currency symbol for your company.

## Site / Upload Logo

From the "Site" menu option, select "Upload Logo".

### **Logo image**

Upload your company logo image. Size should not exceed 330px (wide) x 85px (high).



# Site / Settings

From the "Site" menu option, select "Settings".

## Site Configuration

**External URL Link:** This is the link that points to your external domain. Typically this is the external IP address or DNS. Example: http://externalIP

### Site Configuration

External URL Link 

http://externalIP


## Event Notifications

**Test Email Account:** Enter an email account to receive a test email to confirm that your SMTP settings in Miracle Service are set-up correctly. Click the "Send Test" button.

### Event Notifications

Test Email Account

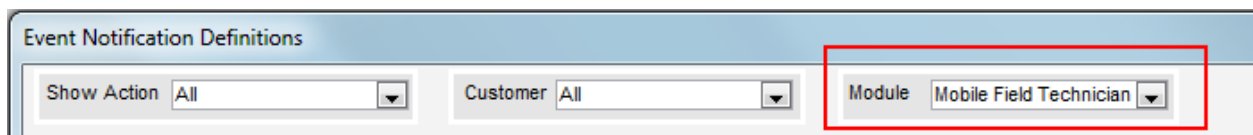
test@company.com

 Send Test

## Event Notifications

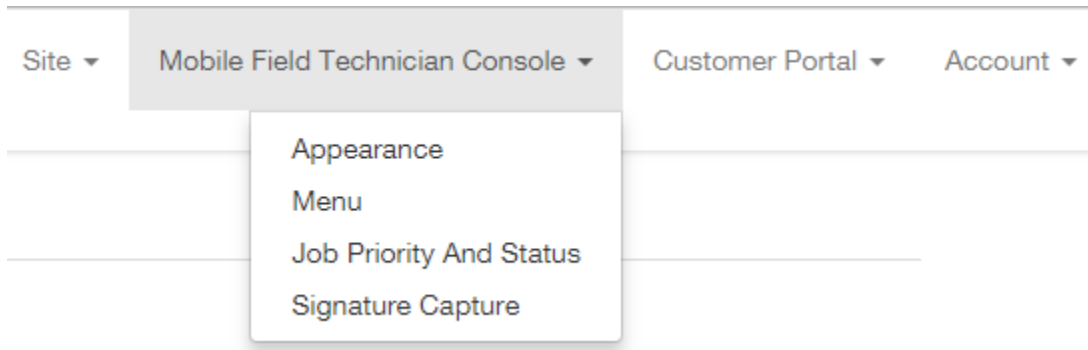
**Test Email Account:** Enter an email account to receive a test email to confirm that your SMTP settings in Miracle Service are set-up correctly. Click the "Send Test" button.

**Setting-Up Events:** The actual email events (example: job completed confirmation, send work order etc.) are set-up in **Miracle Service Administration**. Go to tab 14. Event Manager. Use the 'Module' drop-down menu and select 'Mobile Field Technician Console' to view and personalize the email events. You will need to change the default email (youremail@company.com) to your company's email which you confirmed is working during the 'Test Email Account' step above.



# Mobile Field Technician Console Menu Settings

From the menu bar located in the top-right area of your screen, select the “Mobile Field Technician Console” menu.



## Mobile Field Technician Console / Appearance

From the “Mobile Field Technician Console” menu option, select “Appearance”.

### Calendar

Select the start and end times to appear on the users’ calendars.

#### Calendar

Calendar Start Time

6:00 AM



Calendar End Time

7:00 PM



# Mobile Field Technician Console / Menu

From the "Mobile Field Technician Console" menu option, select "Menu".

## Menu

Set the menus that are to be viewable to the users.

Menu	
Jobs Calendar	<input checked="" type="checkbox"/>
Jobs List	<input checked="" type="checkbox"/>
New Job Requests	<input checked="" type="checkbox"/>
Search Customers	<input checked="" type="checkbox"/>
Search Equipment	<input checked="" type="checkbox"/>
Add Equipment	<input checked="" type="checkbox"/>
View Inventory	<input checked="" type="checkbox"/>
Order Parts	<input checked="" type="checkbox"/>
Transfer Inventory	<input checked="" type="checkbox"/>








# Mobile Field Technician Console/Job Priority and Status

From the "Mobile Field Technician Console" menu option, select "Job Priority and Status".

## Job Priority (optional)

Set text color and icons for some or all of the job priorities. These will appear on the 'Job List' screen, 'Edit Job' screens and anywhere the job priority is visible. If no colors or icons are set, the job priority will appear in default black text.











### Job Priority

Job Priority	Color	Icon
Low	 ▼	Select... ▼
Medium	 #0ca637 ▼	Select... ▼
High	 #fa8e23 ▼	 fa-exclamation-circle ▼
Emergency	 #ed1515 ▼	 fa-exclamation-triangle ▼
Whenever	 ▼	Select... ▼

## Tech Status (optional)

Set text color and icons for some or all of the Tech Statuses. These will appear on the 'Job List' screen, 'Edit Job' screens and anywhere the tech status is visible. If no colors or icons are set, the tech status will appear in default black text.

### Tech Status


Tech Status	Color	Icon
Unassigned	 ▼	Select... ▼
Assigned	 ▼	Select... ▼
On-Route	 #11629c ▼	 fa-road ▼
On-Site	 #11629c ▼	 fa-circle-o ▼
Started	 #0ca637 ▼	 fa-wrench ▼
Completed	 #0ca637 ▼	 fa-check-circle-o ▼

# Mobile Field Technician Console / Signature Capture






From the "Mobile Field Technician Console" menu option, select "Signature Capture".

## Signature Capture Preview Screen

Select which information you want to be visible to the customer on the Job's Signature Capture preview screen.

Change the field order by using the  control to reorder the field placements.

### Detail Fields

<input checked="" type="checkbox"/>	Select All	
<input type="checkbox"/>	Company Address	
<input checked="" type="checkbox"/>	Job #	
<input checked="" type="checkbox"/>	Request Date	
<input checked="" type="checkbox"/>	Scheduled Date	
<input checked="" type="checkbox"/>	BillTo	
<input checked="" type="checkbox"/>	ShipTo	