

# Intuitive Mobile

Equipment Tracking

To track Equipment within Intuitive Mobile a Work Order **MUST** be associated with the Job. A Work Order can be added by using one of the following methods.

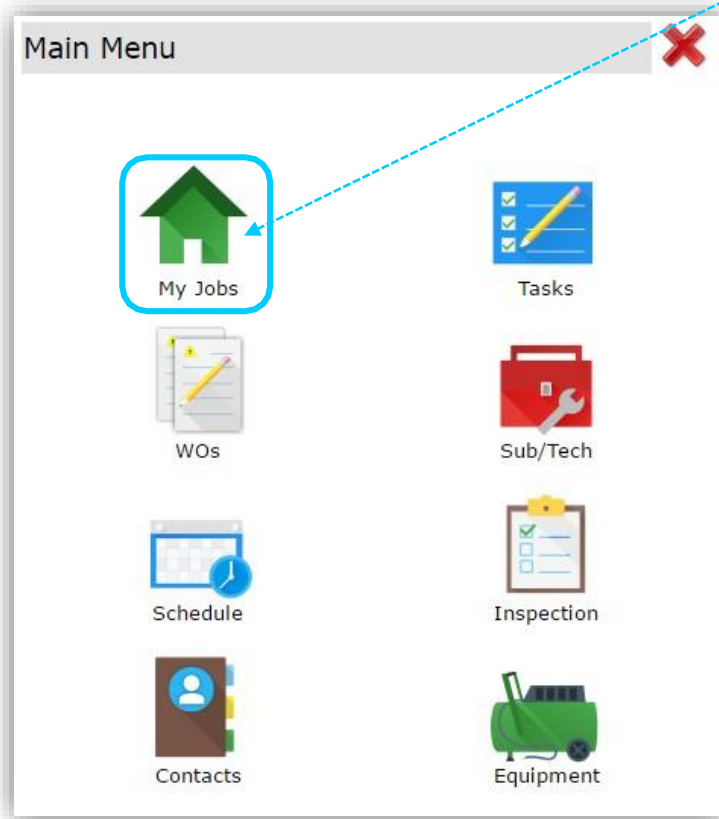
1. In .NET a Work Order can be added during the New Lead/Job entry. By checking Create WO within the Loss section.

2. In .NET within the Job → Losses tab single click on the Loss to highlight then click the + Sign to Add WO. The Page will redirect to the Work Order Detail Page.

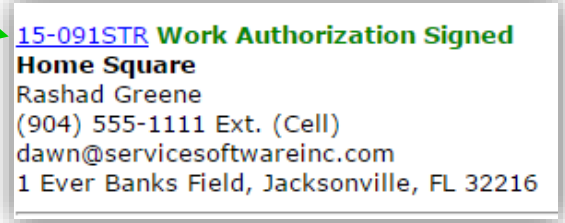
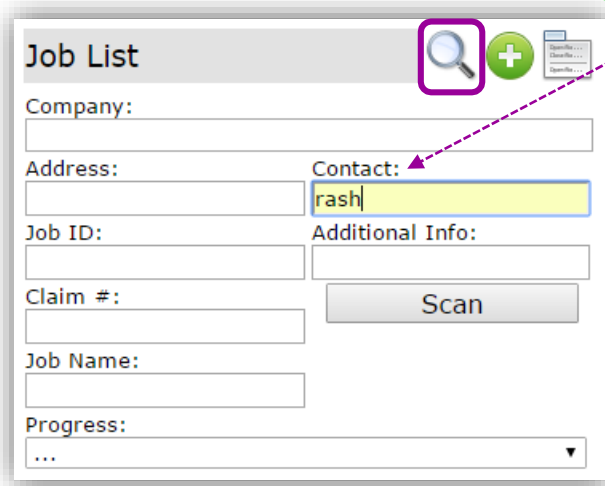
3. In Intuitive Mobile search for the job within My Jobs. To verify if a Work Order is associated with the job in Intuitive Mobile before trying to assign Equipment single click on the Loss Type to expand and the Work Order(s) will display.

If a Work Order isn't associated with the job, then single click on the Loss Type to expand then click the + Add New WO.

After logging into Intuitive Mobile the Main Menu will display, click My Jobs.



The following filters are available to search for the job. Company, Address (*begins with search*), Contact (*contains search – not case sensitive*), Job ID (*contains search*), Additional Info (*contains search*), Claim # (*contains search*), Job Name (*contains search*) and Job Progress. Once you add the information into the preferred filter click the magnifying glass to search. The Job will display below the Job List single click the Job ID to open and expand the Job Details.



Within the Job Detail screen single click Equipment to expand then click the + Assign/Return Equipment to Assign Equipment.

Job Detail ✓ ✗

**Rashad Greene**  
(904) 555-1111 Ext. (Cell)

**Email:** dawn@servicesoftwareinc.com  
1 Ever Banks Field, Jacksonville, FL 32216

Company: Home Square  
Claim #:   
ID: 15-091STR  
Job Name: Home Square  
Progress:

- Snapshot
- Contacts
- Employees
- Additional Info
- Notes
- Documents
- Equipment
- + Assign/Return Equipment**

Scan the Equipment with your hand-held scanner or phone/tablet built in camera. Once the Equipment is scanned the Due Date will always add three (3) days from the current date. The due date can be changed prior to scanning.

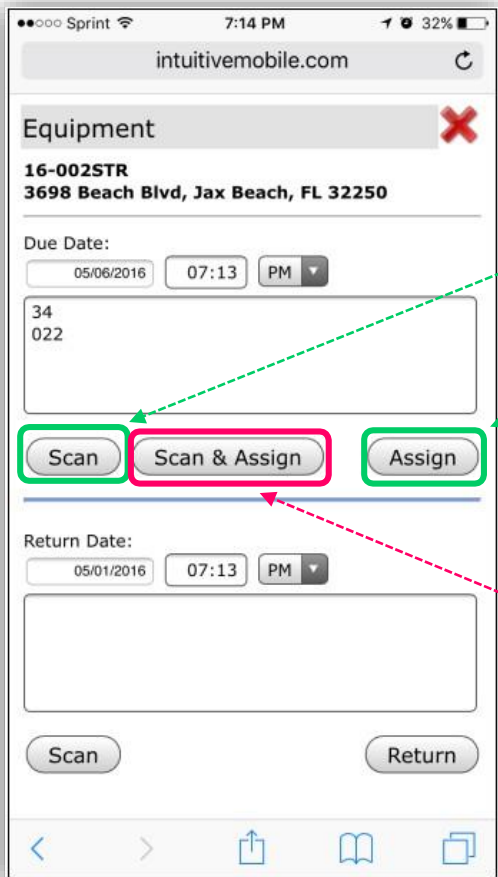
Equipment ✗

**16-002STR**  
3698 Beach Blvd, Jax Beach, FL 32250

Due Date:

May 2016

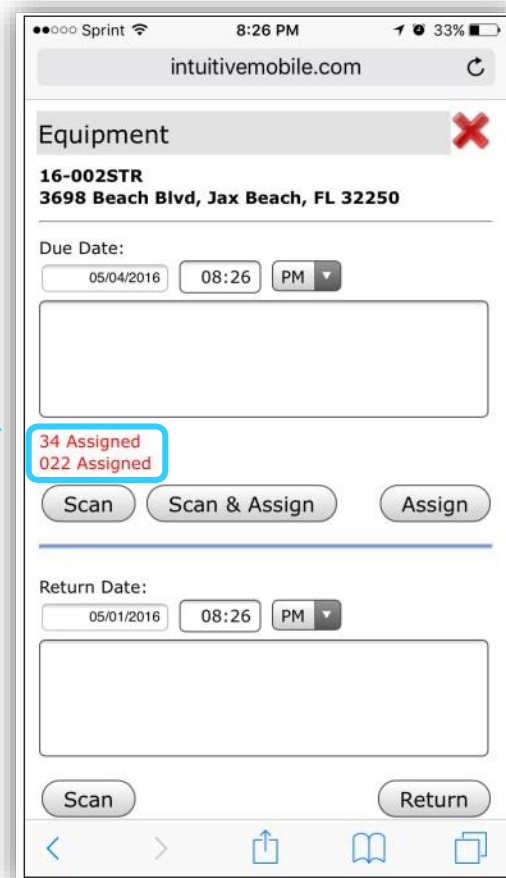
Su	Mo	Tu	We	Th	Fr	Sa
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				



To scan more than one piece of equipment click the Scan button scan all the pieces of equipment once finished click the Assign button.

To scan one piece of equipment, click the Scan & Assign button.

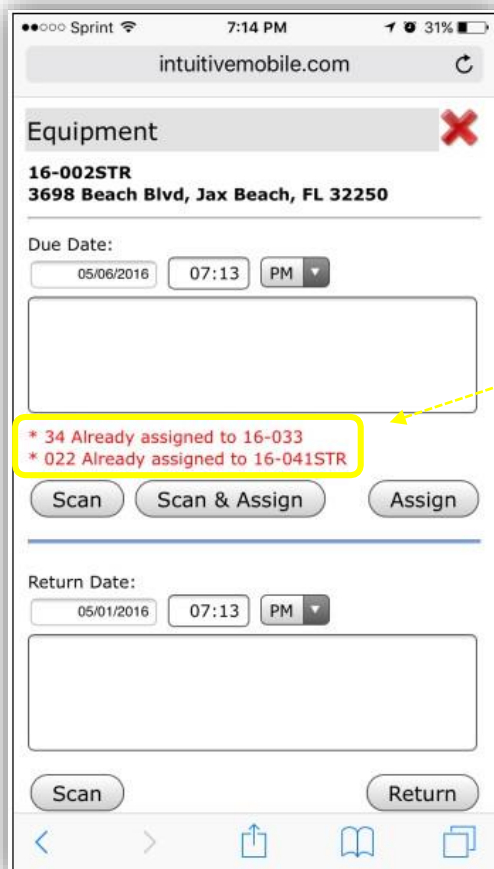
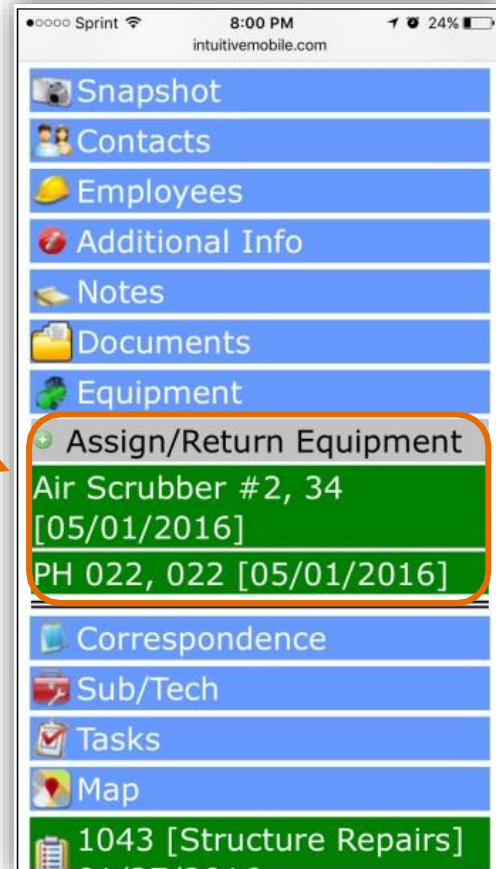
After clicking the Assign button or Scan & Assign button the bar codes of the Equipment assigned will display below the scan box as a confirmation.



When you're finished assigning equipment click the red **X** to return to the Job.

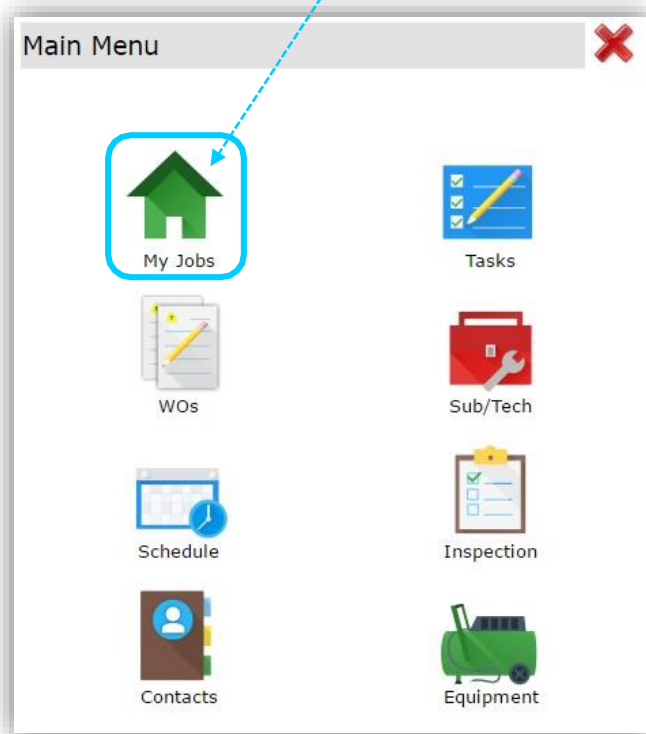


Single click Equipment to expand the assigned equipment will be displayed.  
If the equipment description line is **Green** = Due in the Future. **Yellow** = Due Today. **Red** = Overdue. **Grey** = Returned.



If a piece of equipment scanned wasn't previously returned the following message will be displayed. Letting you know which job the Equipment is still assigned to. You will need to go to that job return the equipment before it can be assigned to another job.

Click My Jobs from the main menu.





The following filters are available to search for the job. Company, Address (*begins with search*), Contact (*contains search – not case sensitive*), Job ID (*contains search*), Additional Info (*contains search*), Claim # (*contains search*), Job Name (*contains search*) and Job Progress. Once you add the information into the preferred filter click the magnifying glass to search. The Job will display below the Job List single click the Job ID to open and expand the Job Details.

The screenshot shows a "Job List" search form. At the top right, there is a magnifying glass icon in a purple dashed box and a green plus icon. Below the icons are several input fields: "Company:", "Address:", "Job ID:", "Claim #:", "Job Name:", and "Progress:". The "Contact:" field is highlighted in yellow and contains the text "rash". A "Scan" button is located below the "Additional Info:" field.

The screenshot shows a job details card with the following information:  
**15-091STR Work Authorization Signed Home Square**  
Rashad Greene  
(904) 555-1111 Ext. (Cell)  
dawn@servicesoftwareinc.com  
1 Ever Banks Field, Jacksonville, FL 32216









Within the Job Detail screen single click Equipment to expand then click the + Assign/Return Equipment to Return Equipment.

**Job Detail**  

**Rashad Greene**  
(904) 555-1111 Ext. (Cell)

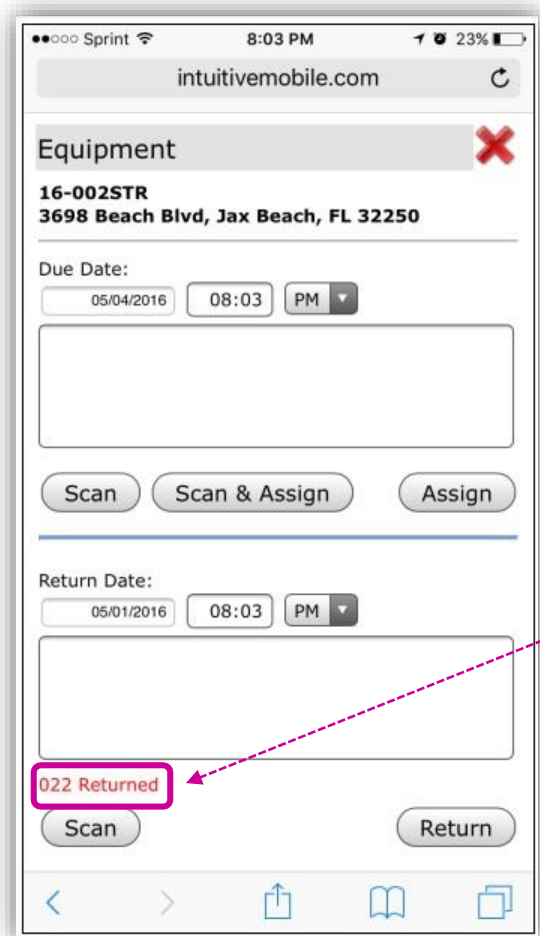
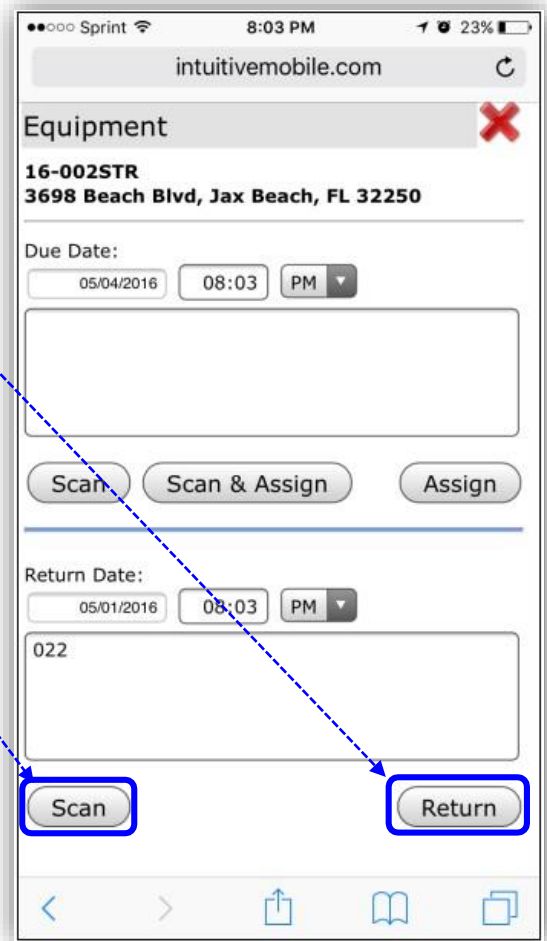
**Email: dawn@servicesoftwareinc.com**  
**1 Ever Banks Field, Jacksonville, FL 32216**

Company: Home Square  
Claim #:   
ID: 15-091STR  
Job Name: Home Square  
Progress:

-  Snapshot
-  Contacts
-  Employees
-  Additional Info
-  Notes
-  Documents
-  Equipment
-  **Assign/Return Equipment**



Click the Scan button then scan your equipment when you are finished click the Return button.

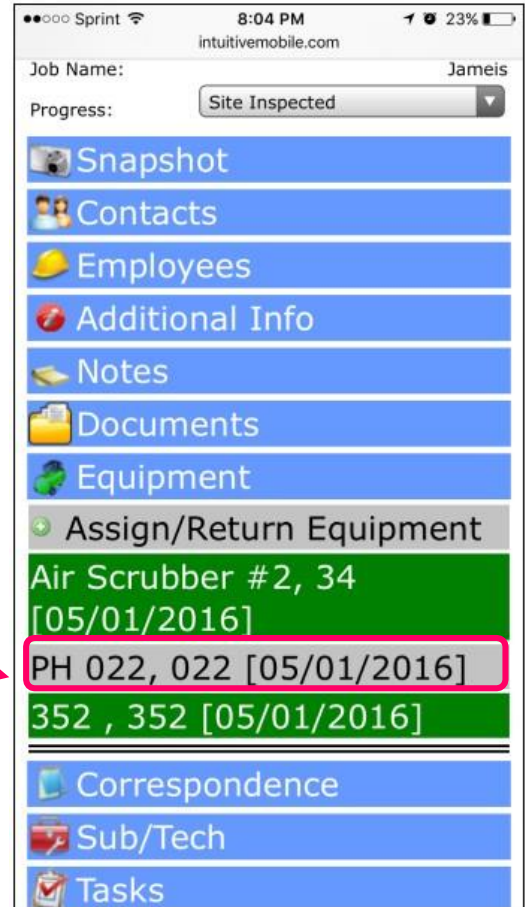


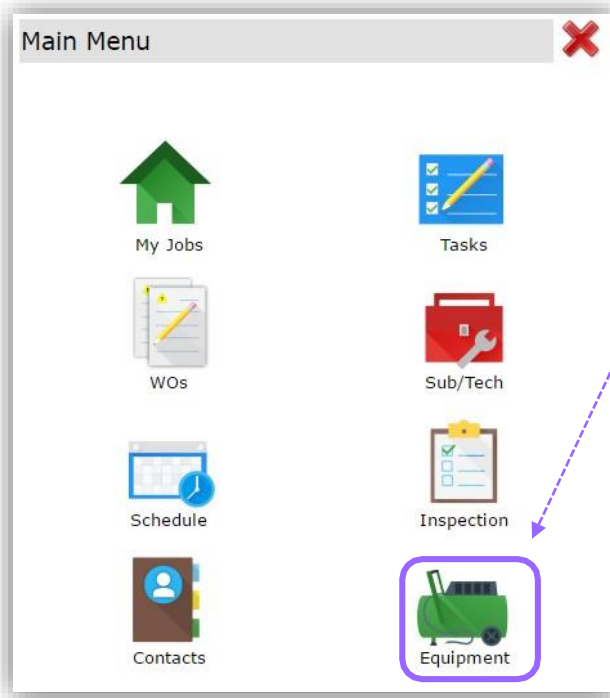
After clicking the Return button, the bar code(s) of the Equipment returned will display below the scan box as a confirmation.

When you're finished returning equipment click the red **X** to return to the Job.



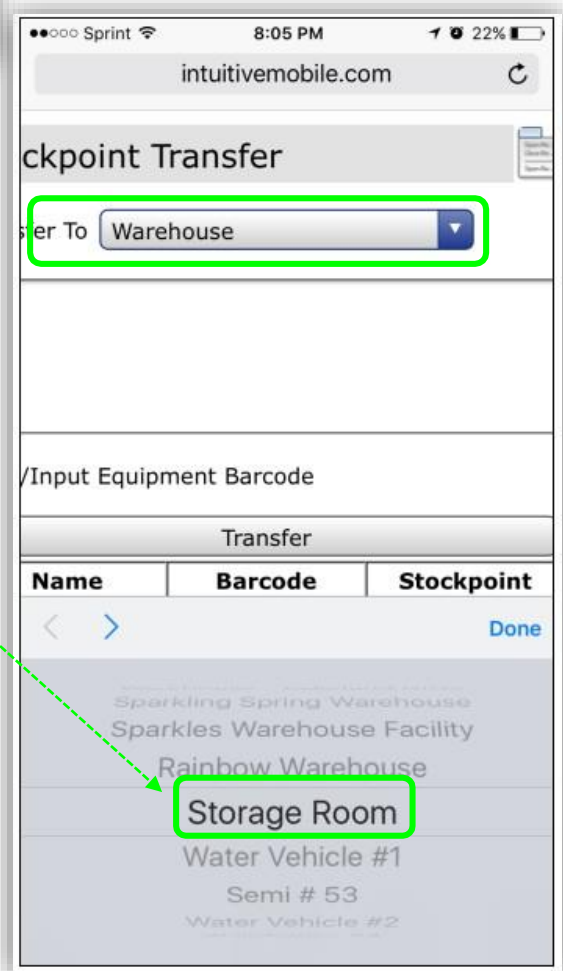
Single click Equipment to expand the returned equipment will be displayed in Grey.

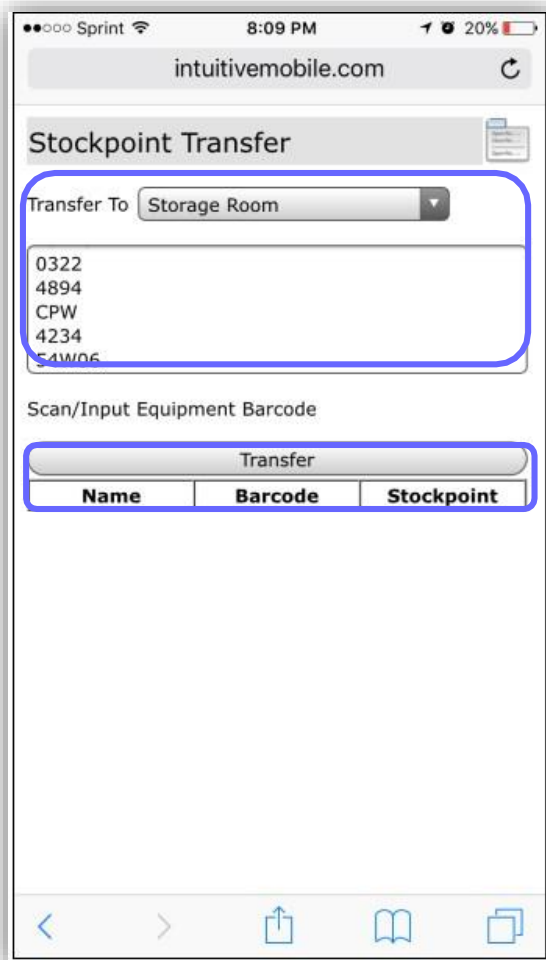




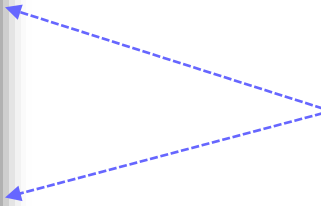
To transfer Equipment from one Stockpoint to another click the Equipment icon from the main menu.

Choose the Stockpoint the Equipment will be transferred to from the drop down.





Scan the Equipment then click the transfer button.



Once the transfer is complete the description of equipment transferred will display in the transfer box.

