POLIXEN

Mobile Worker App
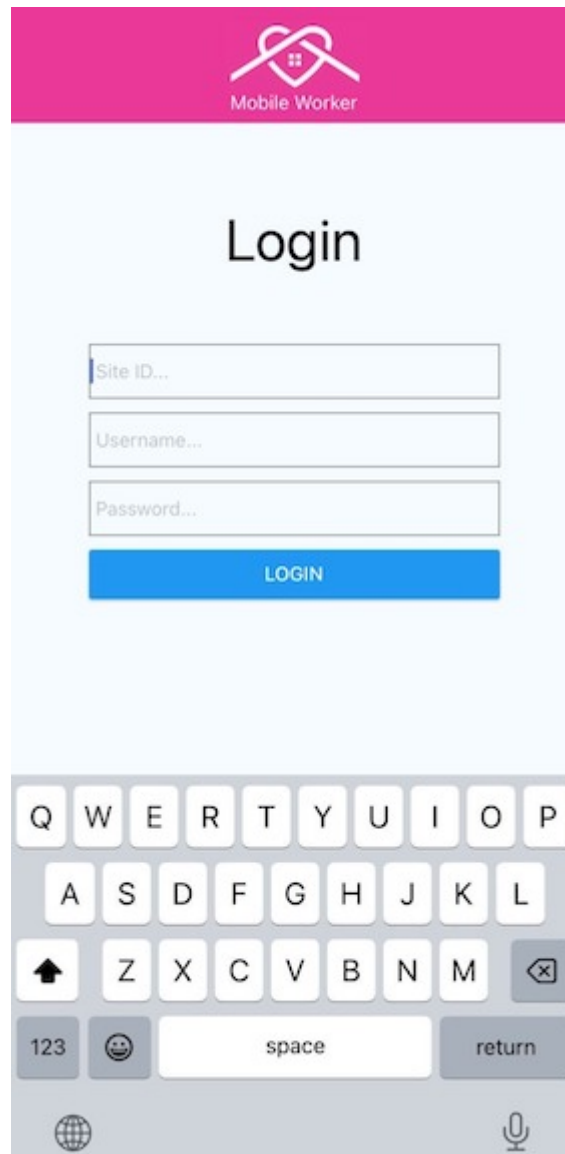
Download the app

Open the App Store or Google Play Store and search for "Polixen Mobile Worker".
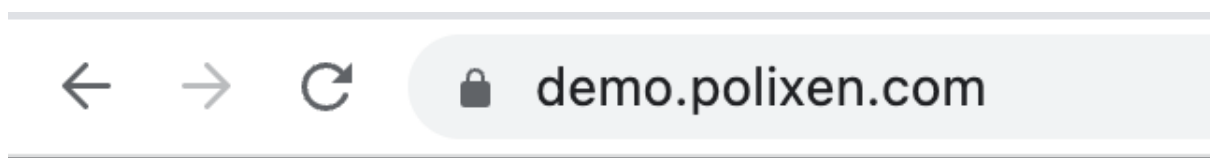
Then click on "download".
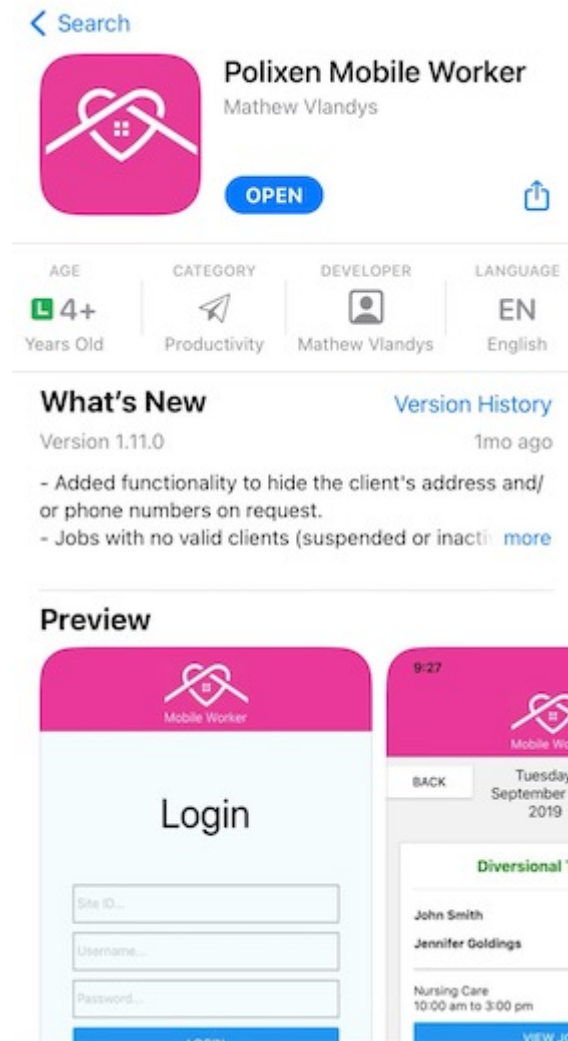
Login

Once you open the app on your phone, you'll be prompted to log in. You need to enter the Site Id*, your Polixen Login and Password.

*Site ID is the name on your browser when navigating through your Polixen Desktop Portal. Example: In this case, the Site ID is "demo"

Please note that numbers and non-alphabetical letters are not accepted in the site ID. If you try to type an invalid character, a pop-up error message will appear.
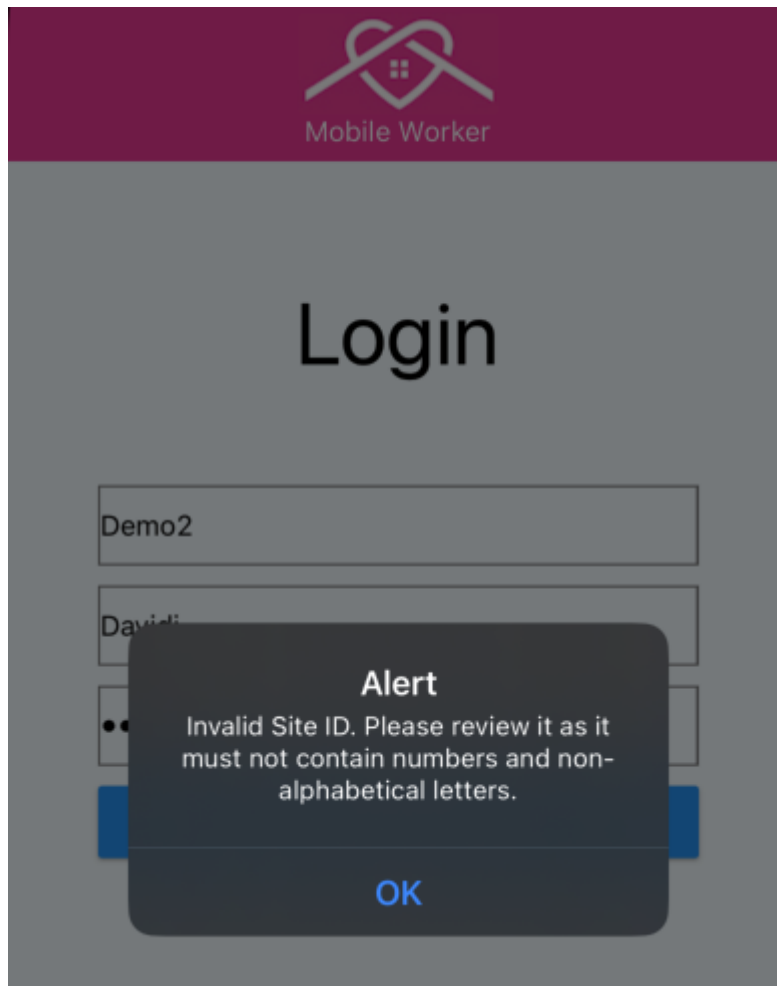
Once all the information is in, hit the Login button to access the app.

Initial page

On the Mobile Worker initial page, you can see the jobs of the current week – including the kind of service, and the client's name plus the time and status of each job.

You can also set up Polixen's system config to show the client's address on that page. To do that, go to Administration > Polixen Setup > System Config.
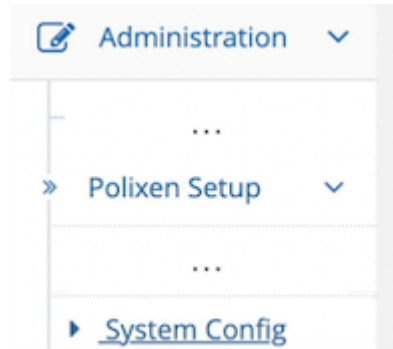
Then go to **mobile_app_job_listing_client_address** and set the value to 1.

mobile_app_job_listing_client_address	1	Mobile Worker - Show clients address at home screen when listing jobs (0 = hide, 1 = show)

Once that is done, the jobs page will look like this:
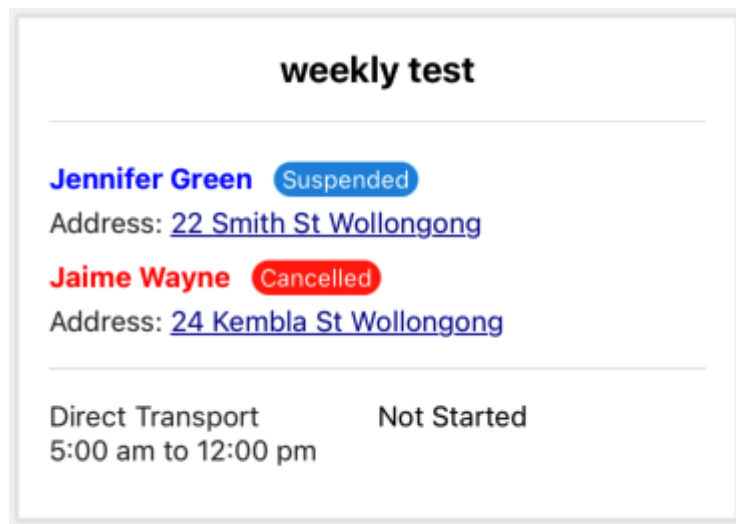
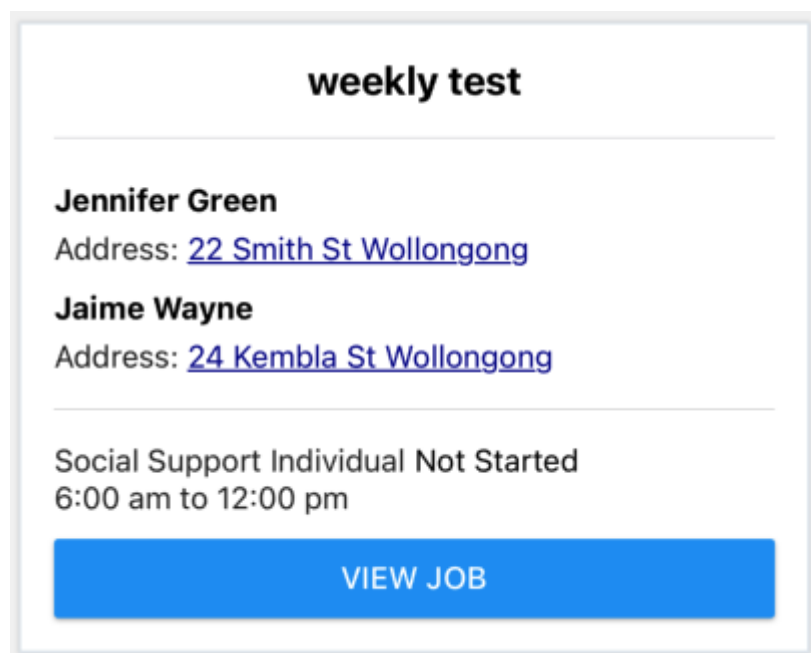Use the "Back" and "Forward" buttons to navigate through past and upcoming weeks, respectively.

You can also check the total Hours/Units of work forecasted for the week.
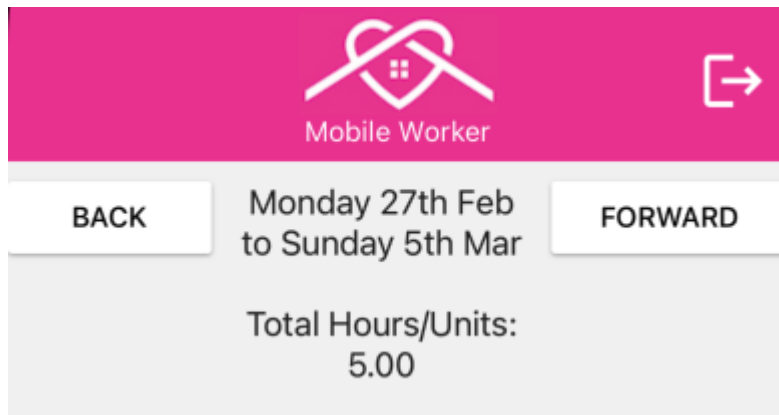
Job status

The job status' are divided into 4 categories, which are colour coded in the app for better visualisation.

Black: not started jobs.

Green: completed jobs.

Red: cancelled jobs.

Blue: suspended jobs.

Please note that jobs can be only cancelled or suspended via the desktop system.

View Jobs

When you click the "view job" button, you'll be taken to the following screen.

Notes

There are two kinds of notes you can create in the app. The first one is "Client Notes", which refer to that particular client. The second one is "Job Notes", which are associated with a specific job.
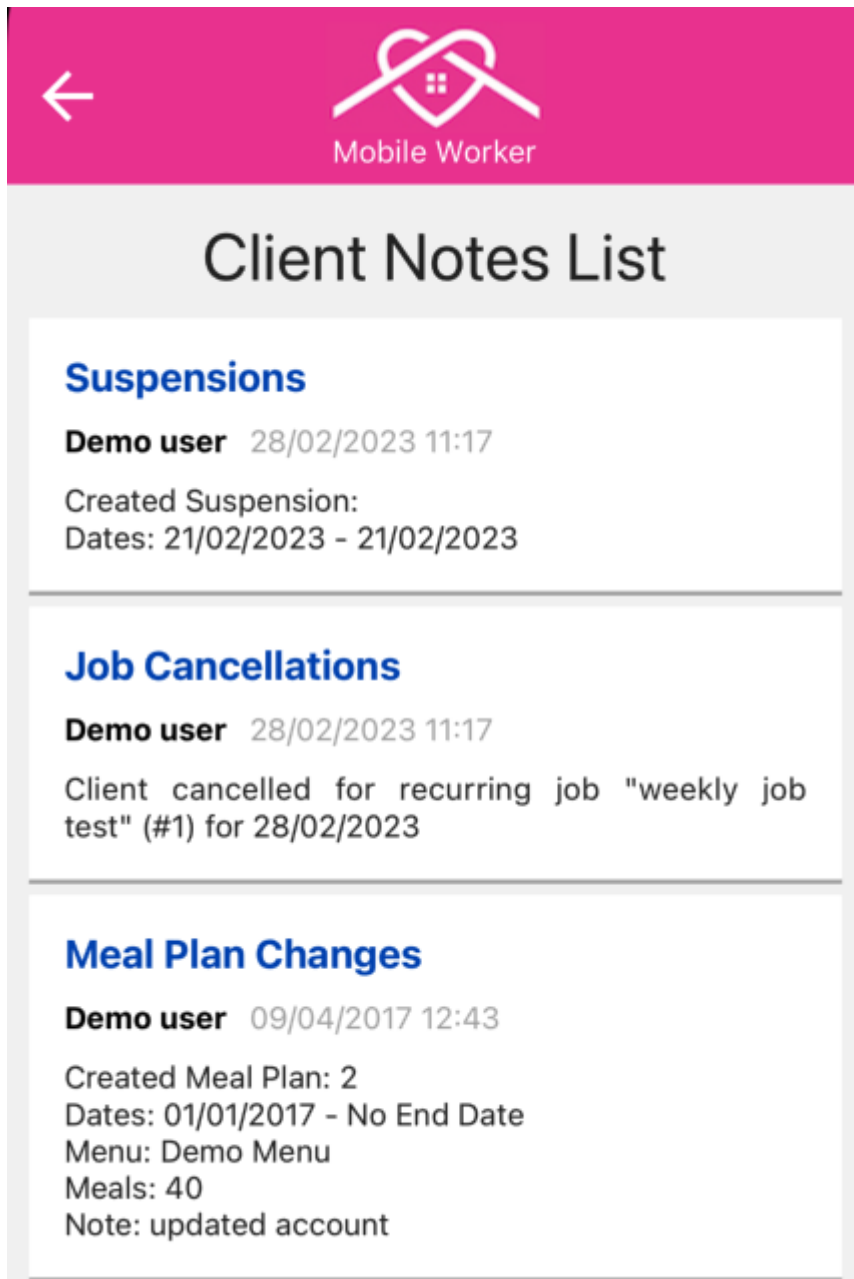
Client notes

To create a new client note, click on the "Add Client Note" button at the bottom of the client information.

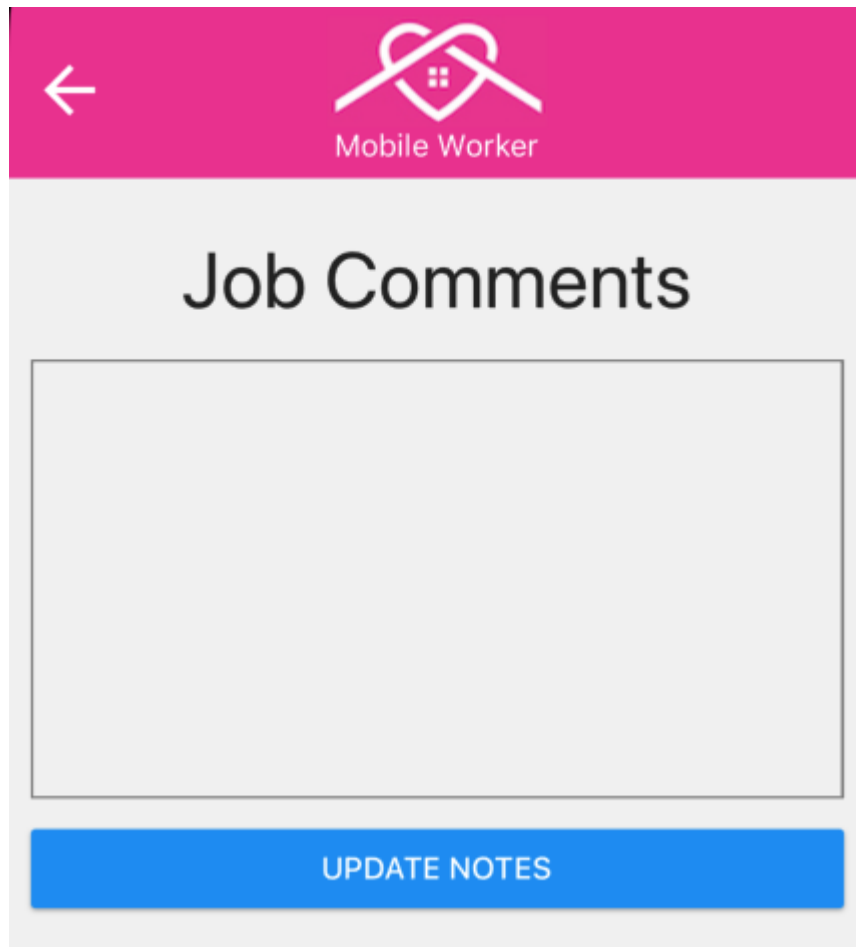When adding client notes you'll be asked to select a category and then write your comments underneath it.

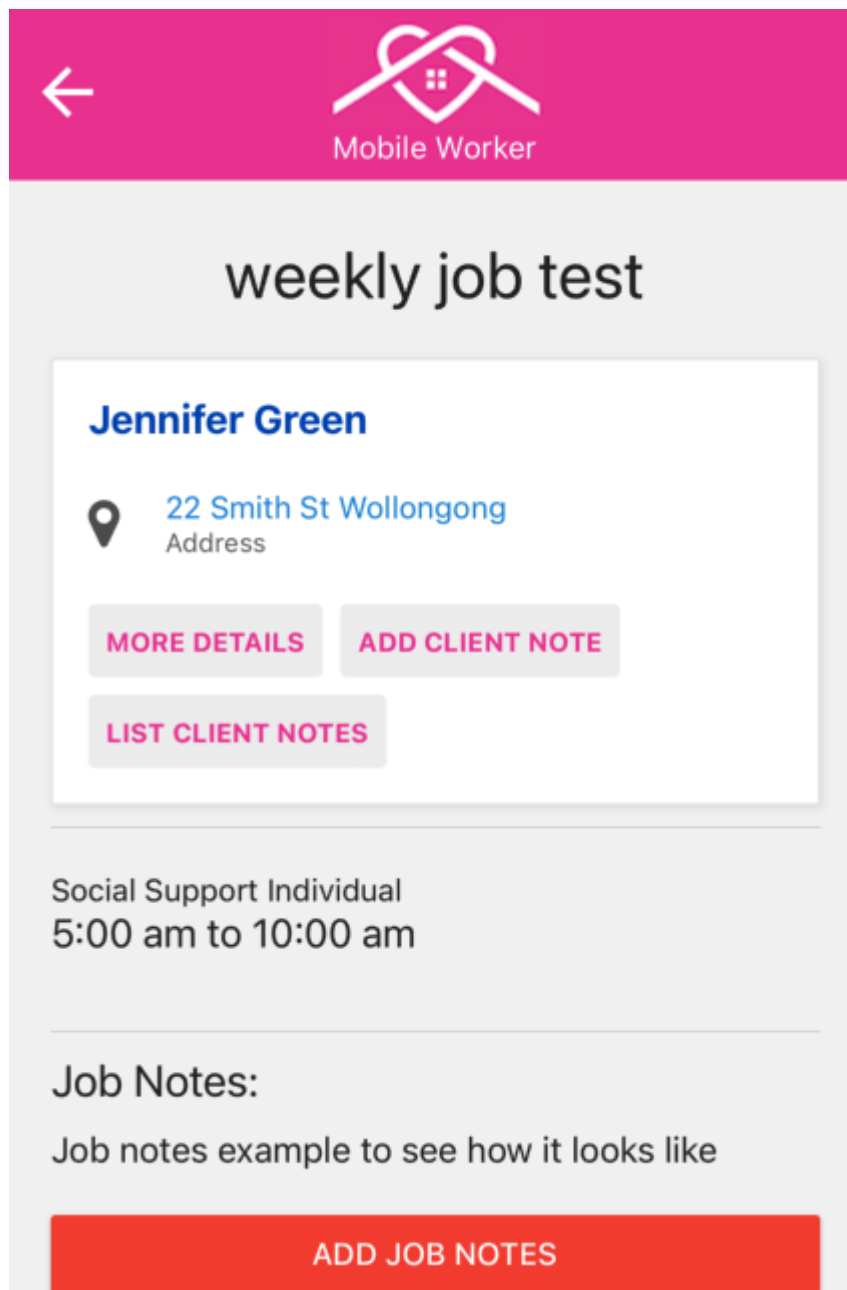You can click "List Client Notes" and view the list of all notes for that client.

Job Notes

For general job notes, simply click "Add Job Notes". Write down your comment and select "update notes" to save it.

Once the notes are saved, they can be viewed on the job's page.

Job Notes History

You can also view past Job Notes both associated with a recurring job or with a particular client.

To view the notes for a recurring job. Simply click on "Job Notes History" on the job details page. Then select the date range to view all notes for that period.

Notes History

for job

weekly test

From: 13/02/2023

To: 20/02/2023

Q Search

Found 3 notes:

Note

Job Date: **20/02/2023**

Note Date: **20/02/2023**

Job note for 20/02 task execution
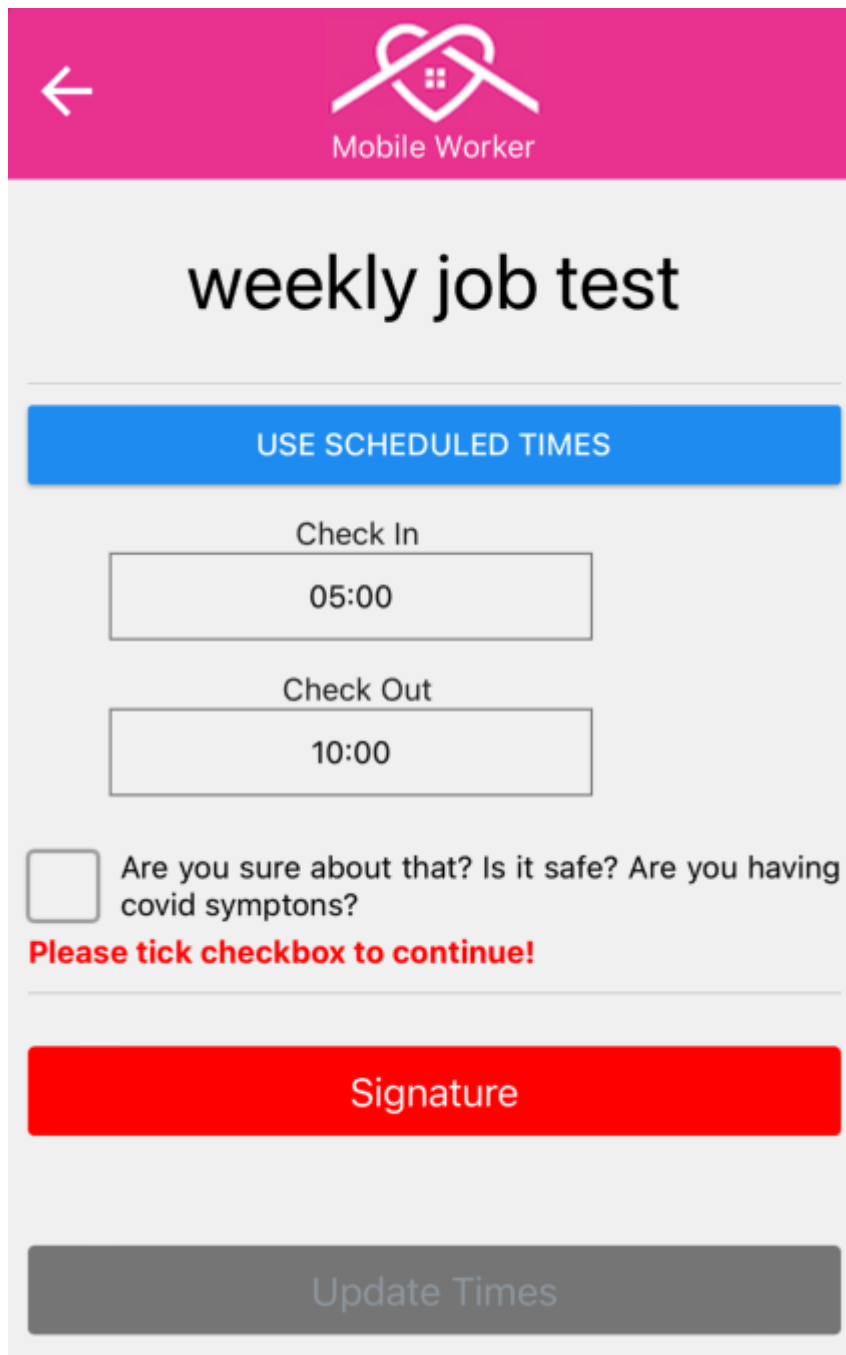
Note

Job Date: **13/02/2023**

Note Date: **20/02/2023**

Job note for 13/02 job task

Note

Job Date: **06/02/2023**

To view the notes history for a particular client, navigate to the client information page and click on "View Job Notes History". Select a date range and click on "search" to view all notes for that client on that period.

Check in & Check out

One of the most useful features of the Mobile Worker App is the Check in & Check out function. When clicking the blue button on the bottom of the page, workers are
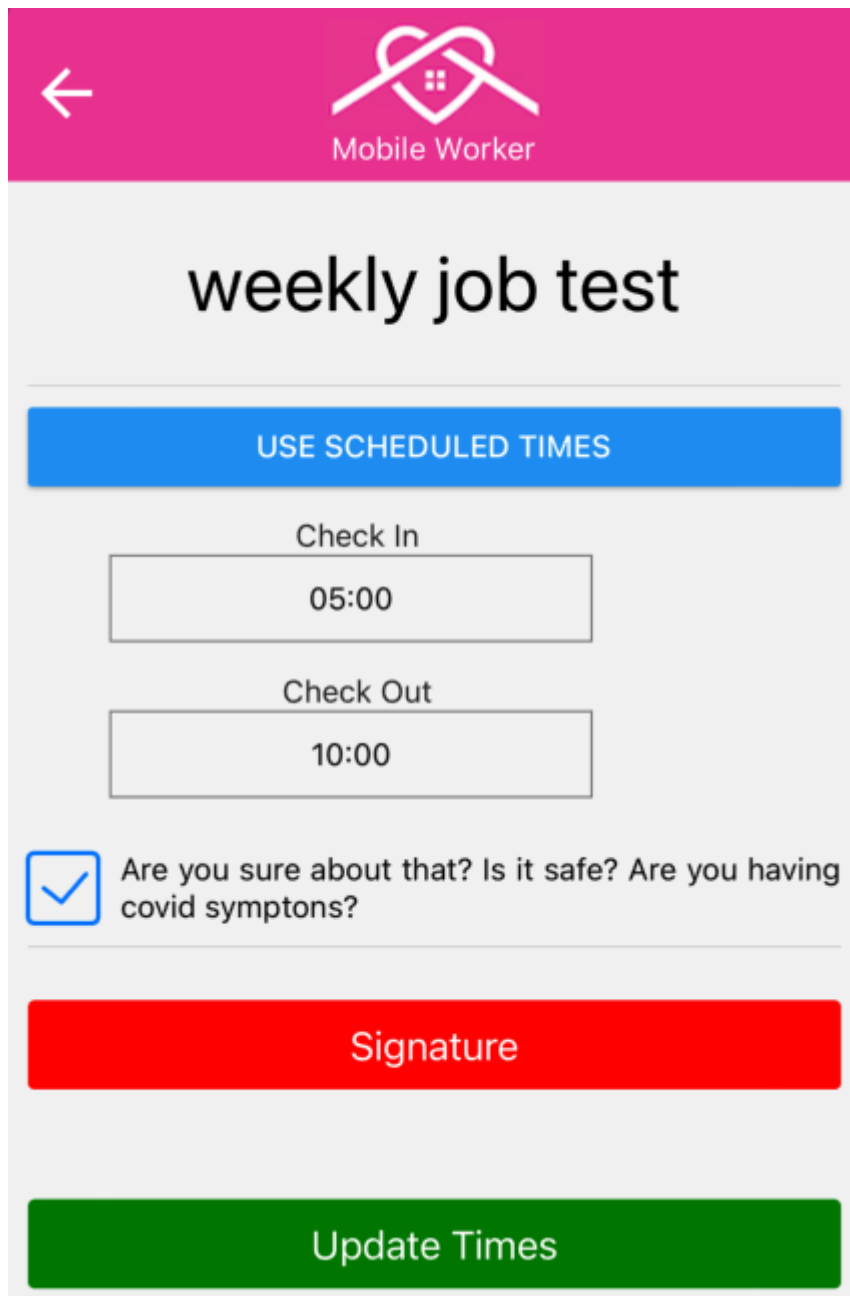
redirected to the following page:

Users can either choose to select "Use Scheduled Times" or complete the Check In & Check Out times manually. There's also the option to include "Total Outing Kms" and "Total Private Kms" to the job record.

Don't forget to tick the checkbox to confirm the information. Once you've done that, you can save changes by clicking on "Update Times".
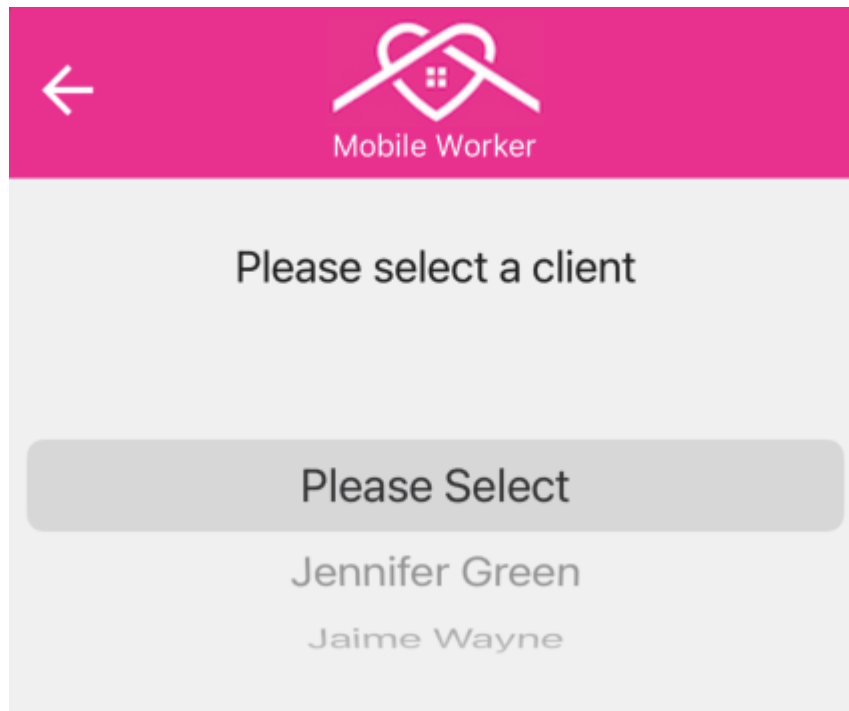
The job status will then be updated to "Complete".

Add Signatures

Workers can also add the client and their own signatures at the end of a job. To do that, click on "Signature" and select one person to sign.

Once you've done that, you'll be redirected to the following page, where the worker or the client can confirm check-in & check-out times and sign it off.

Click "Confirm" to save it.

*Signature request is optional by default. Please contact the team if you want to change it to mandatory.

Documents & Files

On the Mobile Worker App, users can access Documents & Files uploaded from the Polixen Portal. For more information about it, check out our newsletter on the Company Files module <u>here</u>.