



# Field Service mobile app

Generic Quick Reference Guide

Version 0.1

Produced by: Talent & Organisational Development

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## Document Version Control History

| Version Date | Version Number | Summary of Changes                            | Author     |
|--------------|----------------|---|------------|
| 14/09/2021   | 0.1            | Initial Draft                                 | T Fennerty |
| 20/09/2021   | 0.2            | Updated draft with screenshots of updated app | T Fennerty |
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DigitalNL is set to be the biggest transformation programme that North Lanarkshire Council has ever been through.

Over the next 4-6 years, we will embrace and expand our use of new technology to create a more collaborative way of working and deliver services that meet the needs and expectations of our customers.

It is set to be an exciting period of change and everyone will have the opportunity to get involved from the very beginning. Yes, we are modernising how we operate but we need your input and support to make it happen.

*“The Chief Executive outlined his plans for North Lanarkshire and the Digital NL programme sits right in the middle of that. The digitisation team has been working with your service for over a year, to identify how we can use technology to improve for our customers and our communities.*

*Members of staff have been involved in the information gathering looking at how better use of technology can challenge how and where we currently work.*

*The digital transformation will take five years to complete, the Digital NL team will be aiming to work with two business areas at a time and the first services will be Waste and Fleet but also the Employee Service Centre. The team will review the current practices and identify technology that will help deliver the online services customers now expect, but this will also help free up time to allow staff to focus on the customers who need us the most.”*

**Katrina Hassell**  
**Head of Business Solutions**

## Contents

|                                  |   |
|----------------------------------|---|
| Logging into the app .....       | 3 |
| View your schedule .....         | 0 |
| View an appointment .....        | 0 |
| Logging progress of a visit..... | 0 |
| Recording a note .....           | 4 |

**Disclaimer:** The intention of this booklet is for guidance on the navigation and functionality of Microsoft Dynamics 365 CRM system, the screenshots and pictures used are for illustration purposes only, questionnaire and processes may be slightly different depending on application or case.

If you have any enquiries regarding application or case processes/procedures, please contact your Team Leader.

## Logging into the app

1. Select the Play Store icon on your phone
2. Navigate through the list of apps and select Field Service (Dynamics 365) – this will open up a screen with information on the app
3. Select **[Open]** on the screen – this will present a login screen
4. Log in using your NLC Office 365 account credentials
5. You may also be asked to provide some additional verification details (e.g. questions and answers)

 If you are having difficulty logging in then call the IT service desk

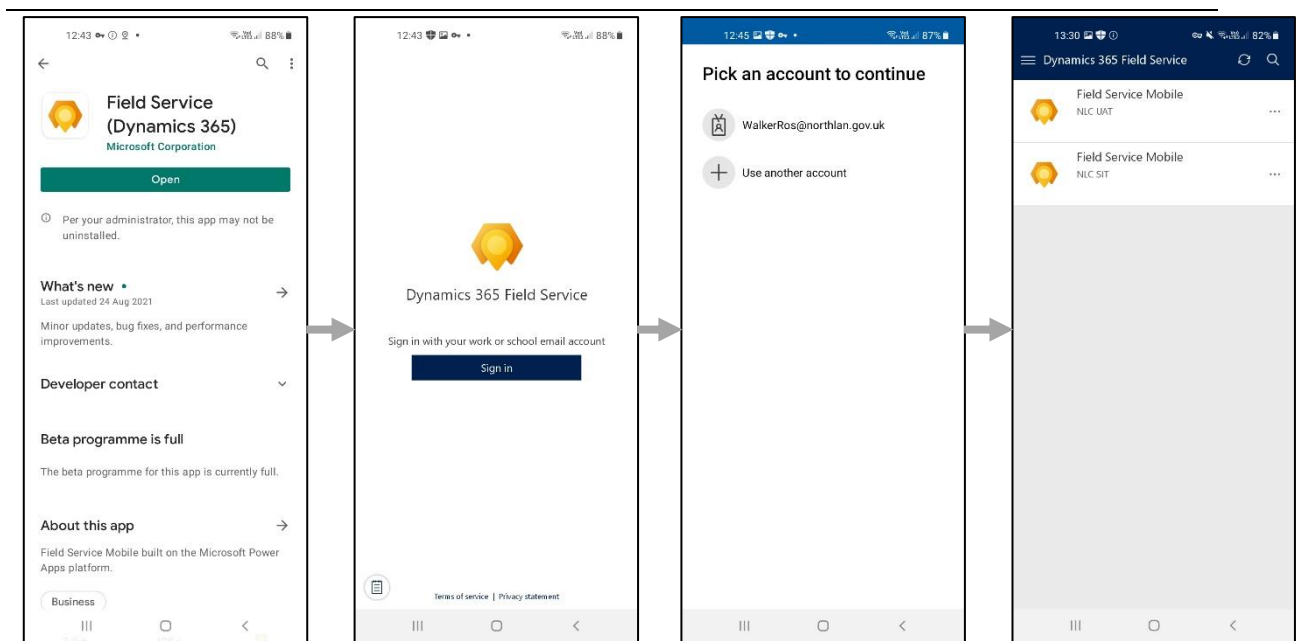



Figure 1. The screens that you'll navigate to open the Field Services app. (1) the app information page, (2) the login page, (3) it may present you with your account if you've already logged in

6. This may present you with options of different versions of the app to open – select 'Field Service Mobile'
  7. The app will navigate you to the landing page
-  You should only need to login when you first open the app, or change your password. Every other time the app should open without requiring authentication



- ✓ **If you do not have an NLC issued mobile, you are allowed to enter your personal number to receive the multi factor authenticator text (The SMS received is free)**
- ✓ **When you change your NLC password, Dynamics will automatically be updated. Please enter your new password on next log in.**



- ✗ **You will not have access unless you have been assigned a licence. If your login is denied, please contact management team.**

## View your schedule

1. Open the Field Service app on your phone
  2. Log into the app using your NLC account credentials
  3. The default home page should be a view of your schedule for today
- ① You can choose between an 'Agenda' view, a 'Day' view, and a 'Map' view

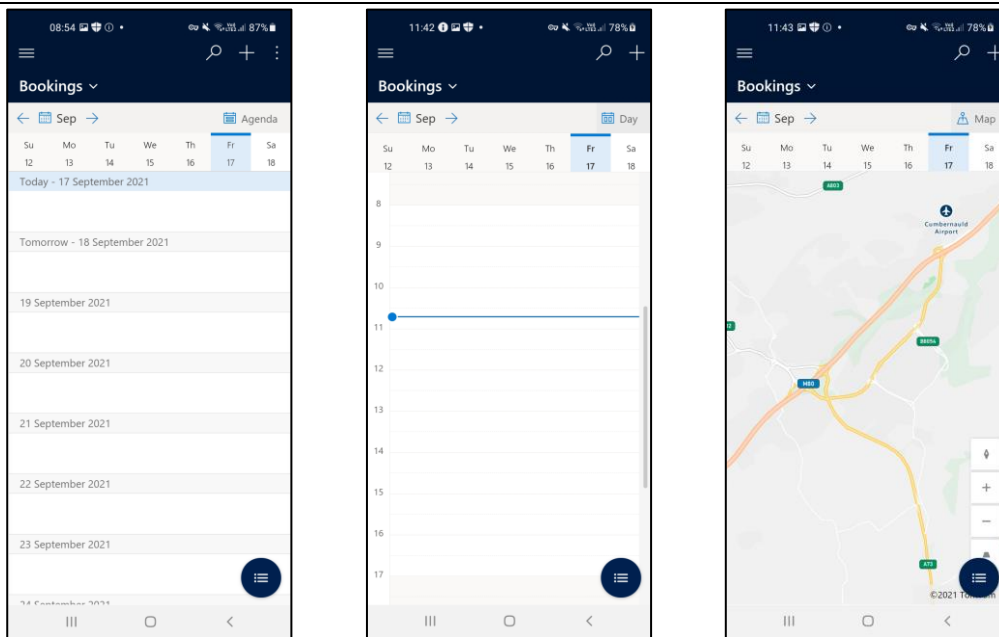


Figure 2. The Agenda, Day and Map views that you can choose to view your schedule.

4. To select the view you want press the icon in the top righthand corner (underneath the 'Bookings v' heading) – it may say 'Agenda', 'Day' or 'Map' next to an icon
5. This will present a dropdown list with Agenda, Day and Map view options – select the one you wish to apply

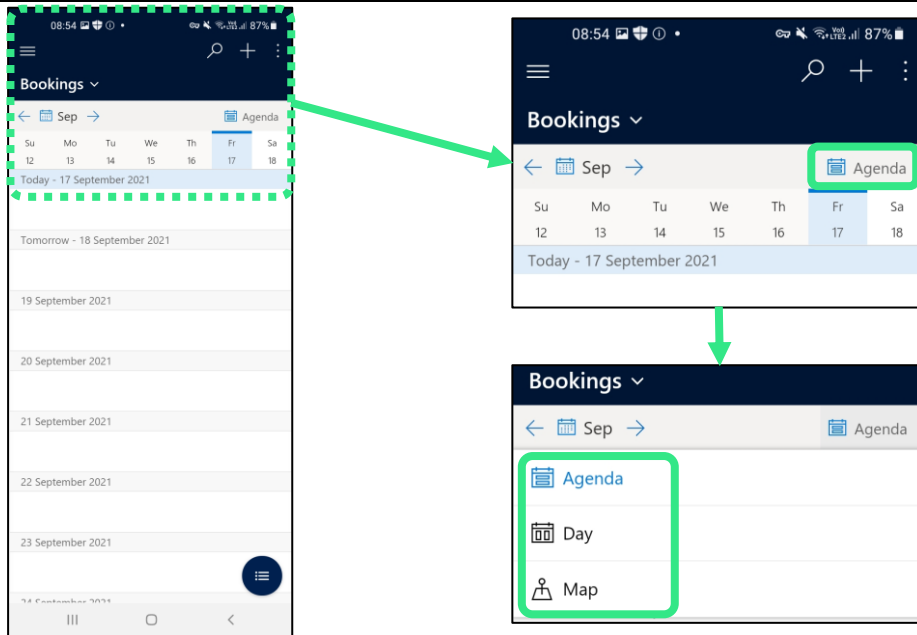


Figure 3. Changing the view. Screenshot 1 is the default 'Agenda' view.

- In the Agenda and Day views you can navigate to future and past days using the date buttons, the calendar icon and the '←' and '→' buttons

Selecting the calendar icon will allow you to pick from a greater range of dates quickly

Selecting these arrows will move you backward or forward a day

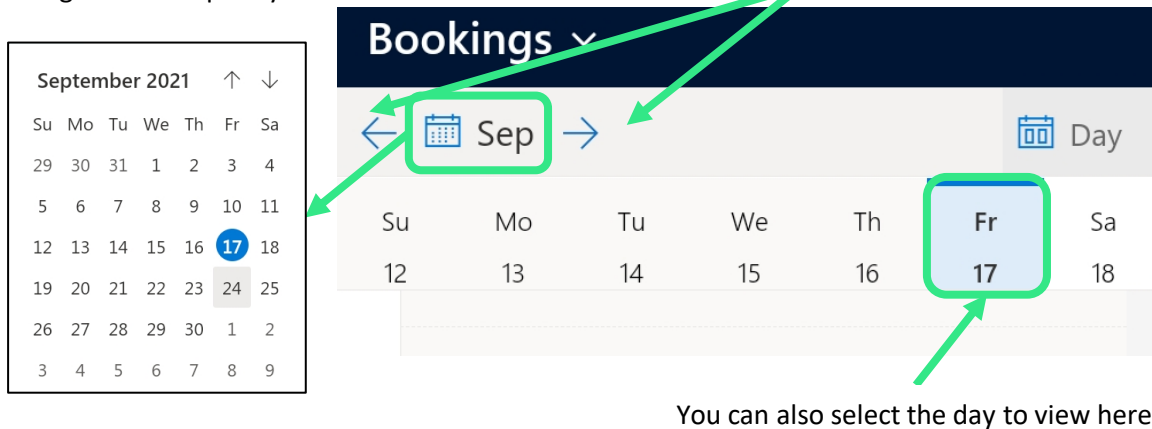


Figure 4. Options for navigating to different days in your schedule.

## View an appointment

1. When in the schedule navigate to the appointment you want to see – appointments will be displayed with a time, name of SU, task and their address
2. Select that appointment
3. This will open up a new view - from here you can view a range of information on the visit by using the tabs at the top

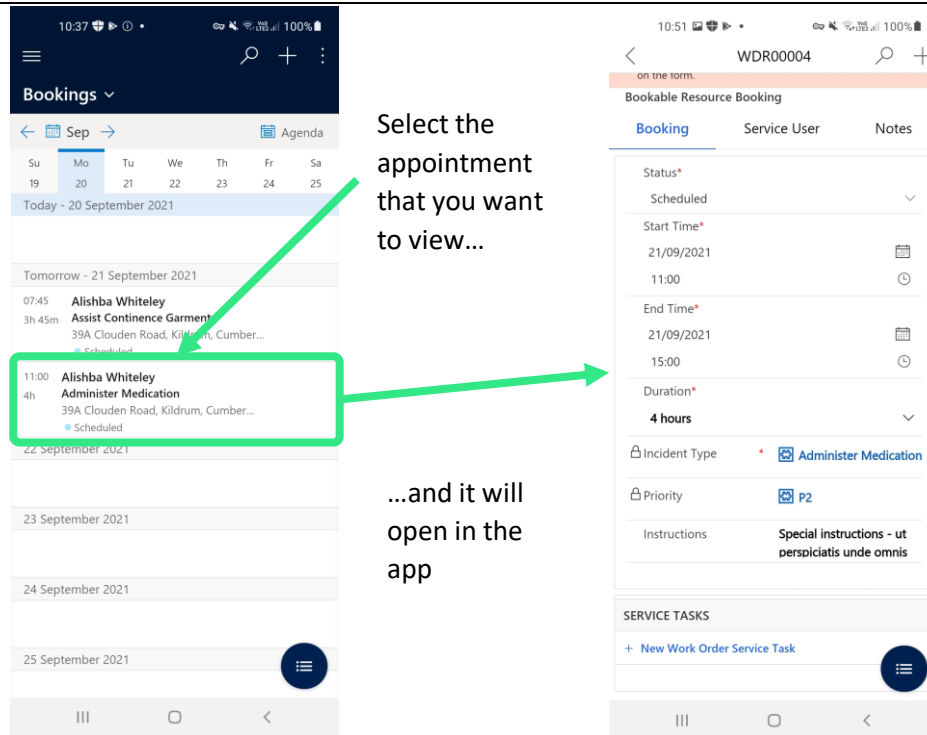


Figure 5. Opening up an appointment in the app.

① The tabs in the appointment each display a different set of information to do with the booking, the service user or any notes

4. If you want to see general information on the visit, including tasks to be completed go to the Booking tab
5. If you want to view information on the service user, including address, keysafe / medsafes details, and alerts then go to the Service user tab
6. If you want to record a note, or view previous notes then go to the Notes tab

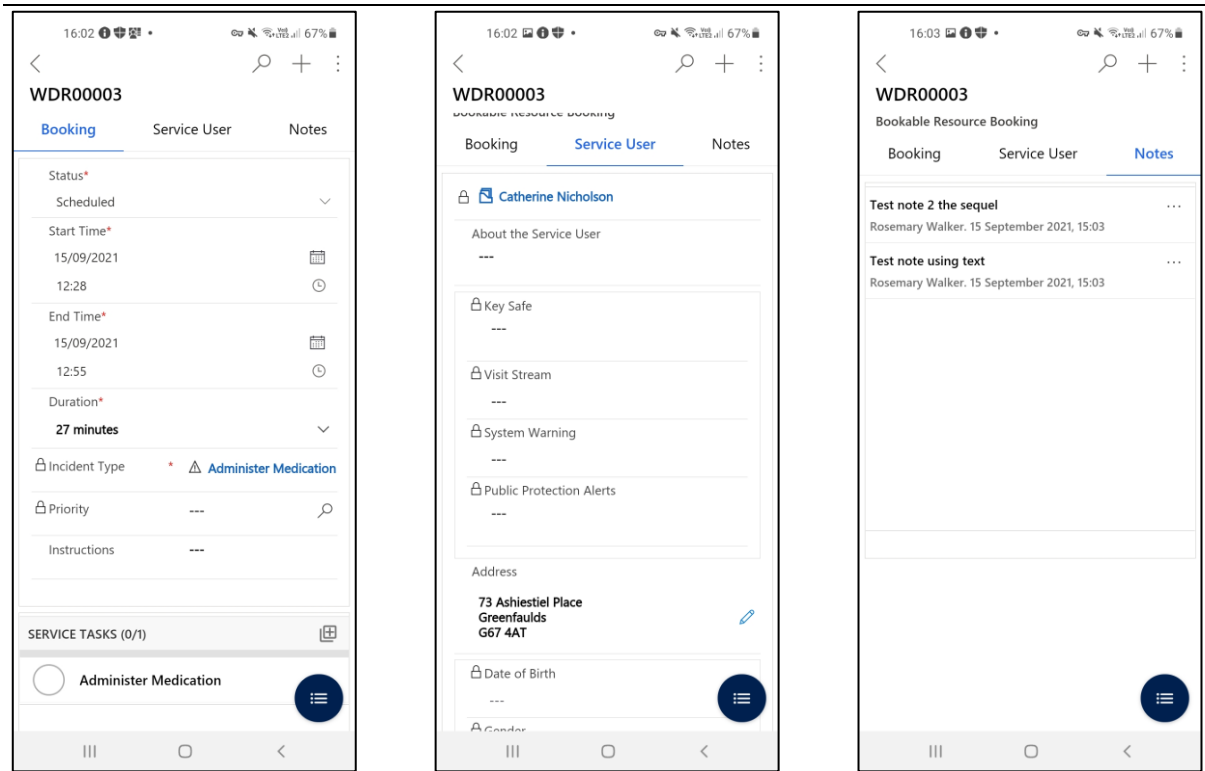


Figure 6. The different tabs that are available for an appointment in the app (from left to right) – Booking, Service User, and Notes tabs



# Logging progress of a visit

Field Services is different to what you've previously used as it allows you to record progress and log completion of your visits – this allows the service to see your progress and potentially re-schedule visits quickly, as well as having a record of care

1. To log a visit go to the appointment that you are about to travel to in the app's schedule view (see view an appointment)
  2. In the Booking tab you should update the status of the visit by selecting the 'Status' field at the top – this will open a drop-down menu of options
- ① Changing the status field allows Support Officers to see whether you are on track to make visits – and arrange cover if it looks like you will be unable to make them.

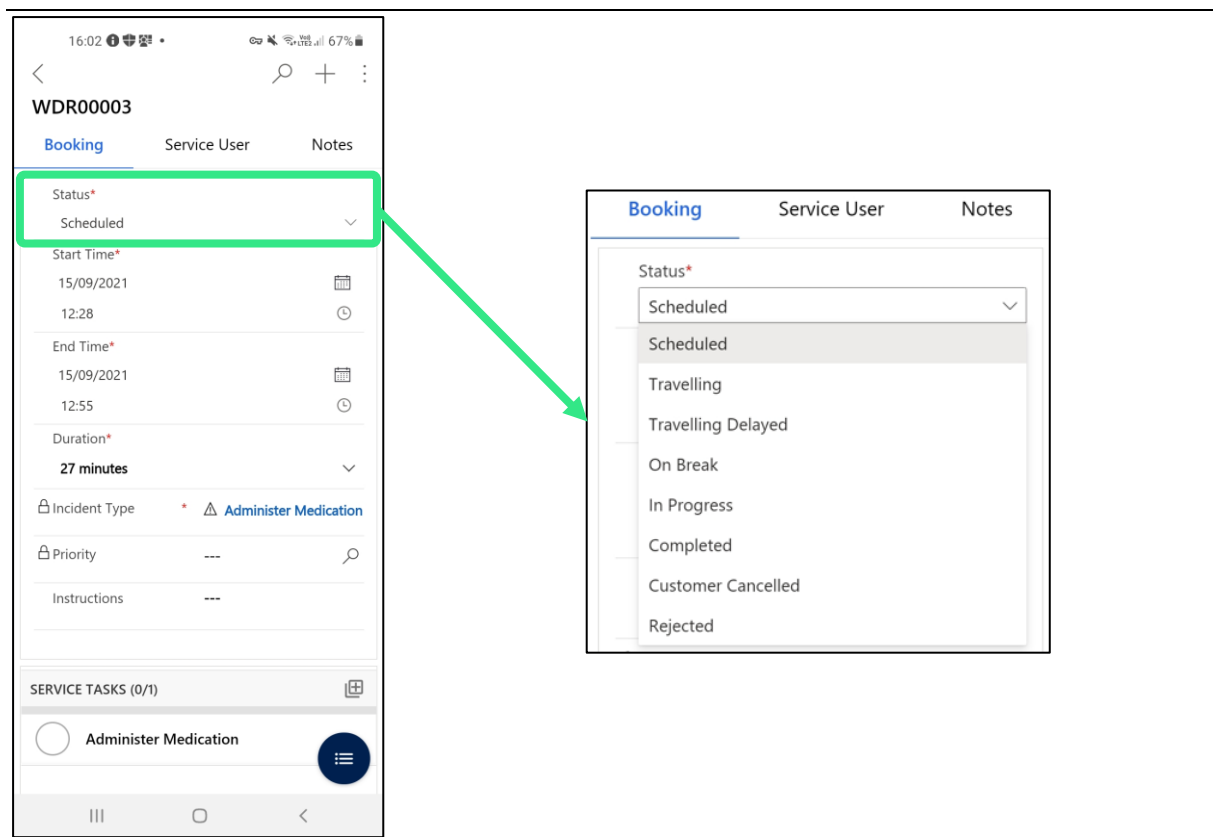


Figure 7. Changing the status of the visit

3. Pick the status that best reflects your progress – the table below shows which status you should use

| Status                    | What it means / when to use   |
|---------------------------|---|
| <b>Scheduled</b>          | This is the default status setting – it means that the visit is scheduled |
| <b>Travelling</b>         | You are on your way to the visit  |
| <b>Travelling Delayed</b> | You are on your way to the visit but you expect to arrive late            |

| Status                    | What it means / when to use  |
|---------------------------|--|
| <b>On break</b>           | You are currently taking your break – you should not need to use this status as we will not schedule visits during your breaks   |
| <b>In progress</b>        | You are currently completing the visit – update to this status when you start the visit / enter the service user's home  |
| <b>Completed</b>          | You have completed the visit and are leaving the service user's home   |
| <b>Customer cancelled</b> | This option should only be selected once you've checked the service user's home and talked to the office about the visit. The office may add this update on your behalf<br>The service user is not at home or a carer/relative has informed you that they do not require the visit when you arrive |
| <b>Rejected</b>           | Only use this option if there is a legitimate reason for you not to take this visit (e.g. you are a prohibited worker for this person or have a restriction that means you are unable to carry out the visit. Contact the office before you use this update  |

① If you change the status you should select the **[Save]** or **[Save & close]** button before you close the visit so that your changes are saved (see below for instructions on how to do this)

4. When you have arrived at the service user's home and are carrying out care tasks you should log when you have completed them

① Care tasks are listed on the Booking tab of the visit at the bottom

5. You can log a task as complete by selecting the circle (O) on the left on the task name – selecting a circle will turn it green to show it has been completed

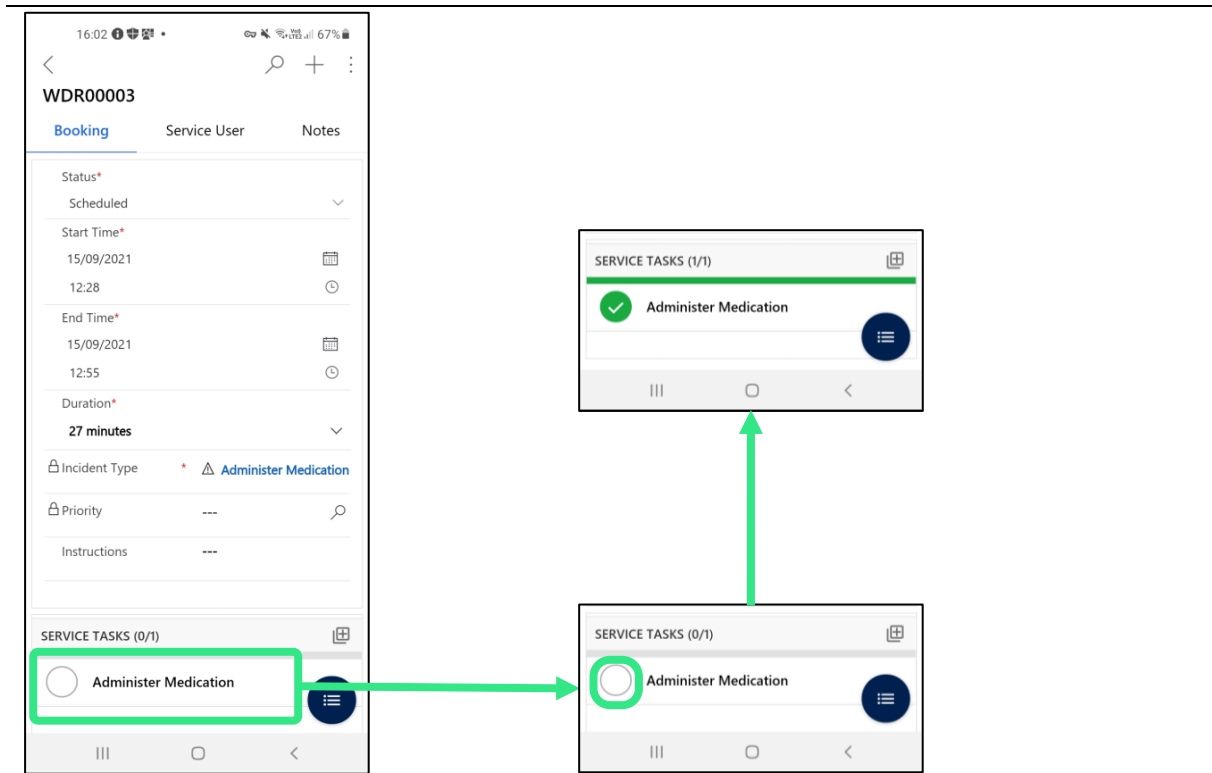


Figure 8. Logging the tasks completed during a visit

6. Once you've logged all tasks and you are finishing up you should change the status of the visit to 'Completed'
7. Select **[Save & close]** to make sure any information you've logged has been saved

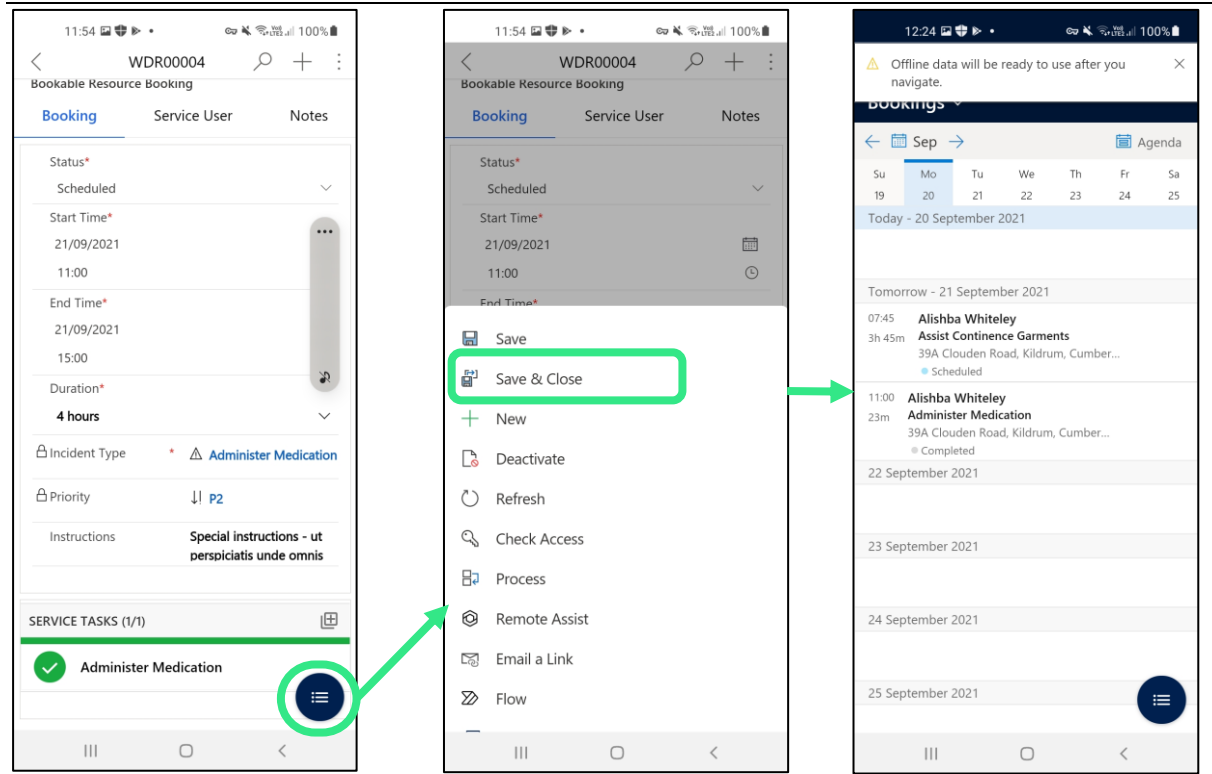


Figure 9. Saving your changes once you've completed a visit. The app will take you back to the schedule view once you have saved and closed.



# Recording a note

Sometimes you may want to record a note about the visit. You can do this in the app through the following steps

1. Open the booking in your schedule
2. Navigate to the 'Notes' tab
3. At the bottom of the phone there should be a blue button with three dots and lines, in the bottom righthand corner of the screen – select this
4. It will display a menu of options – you can choose what media you want to use to record a note. **[Text]** will allow you to type a note. **[Photo]** will allow you to use the phone's camera to record an image. **[Video]** will allow you to record a video. **[File]** will allow you to attach a file.
5. Record your note

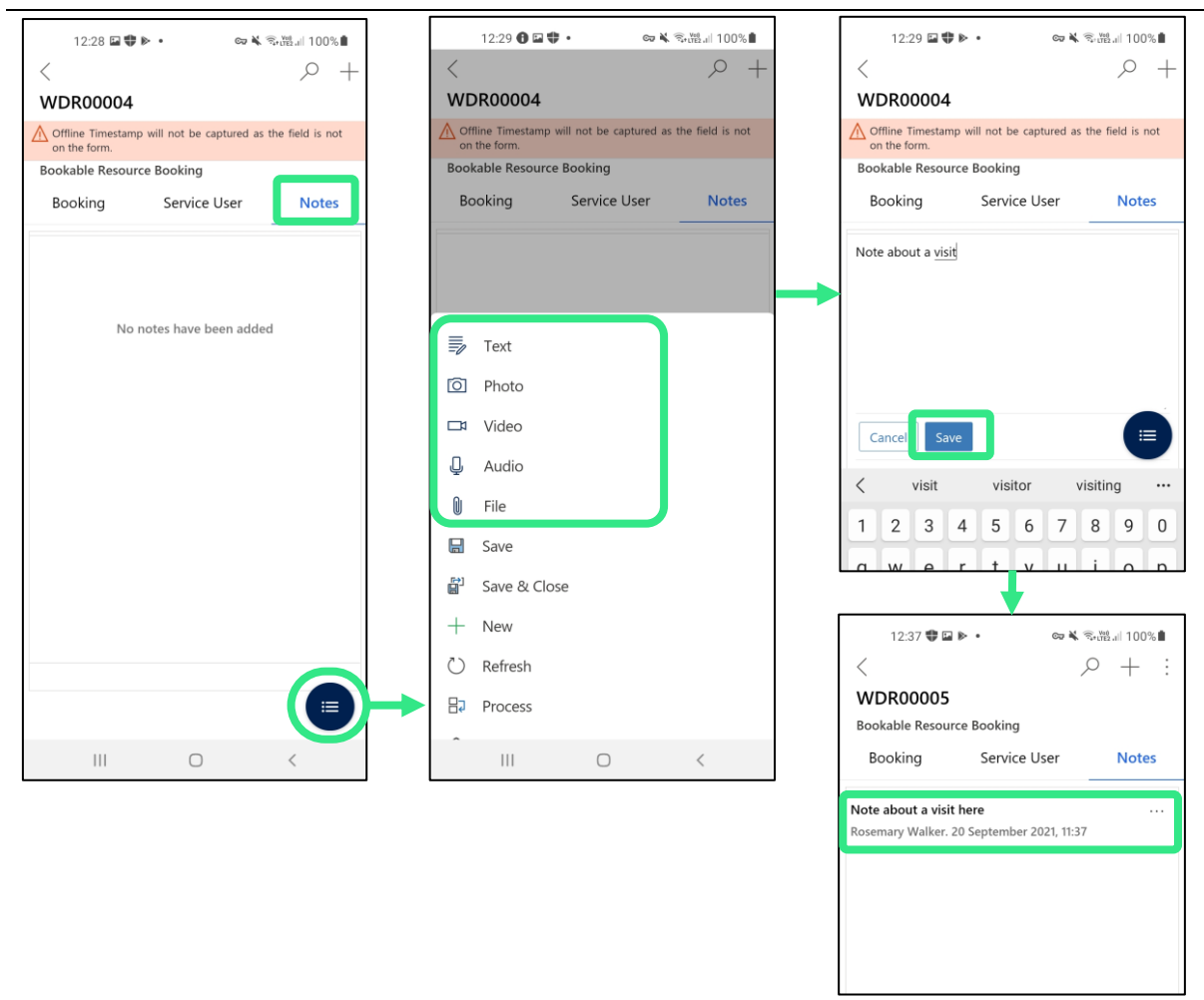


Figure 10. Recording a text note on a visit

6. Once you have recorded your note select the **[Save]** button – this should close the entry and the note should now appear in the Notes tab as an entry
7. Select **[Save & close]** from the menu once you have completed the visit

