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Service Point SQL
Management Software

Installation Instructions for the
SP Mobile remote option for ServicePoint SQL

The following pages of instructions should allow you to successfully install the SP Mobile software. If you need assistance, please contact us via email using support@rtmcs.com, or call toll free at 866-879-3867.

If you are installing for the first time:

The initial install/setup requires two things: 1. A web server on which to host the apsx files, and 2. Set up of the web.config file to allow access to the correct ServicePoint database.

We recommend hosting the app in-house. The #1 reason for this is security. If the app is hosted on the customer network, the firewall only needs to allow hmtl access to the internal network, routing the request to the proper address. To set up the inside server requires IIS to be set up on a computer on the network, and the downloaded file unzipped into the default directory for the web server (usually Inetpub\wwwroot). Routing html access to this computer should result in a browser opening the Default.aspx page.

The web.config file contains the information needed by the app to access the CounterPoint/PBS/GP and ServicePoint data. As delivered, the SP Mobile installation contains a file called starter.web.config. ***The starter.web.config.file must be copied to create a file called web.config***. After modifying the values referenced below, this web.config file must be located in the default web server directory. The section that needs to be addressed and modified to fit the user's configuration is contained within the "appsettings" tags. The following lines contain some default settings as they may exist in the attached file.

```
<appSettings>
  <add key="DBServer" value="VIRTUAL-55351\SQLEXPRESS2008" />
  <add key="DBOwner" value="dbo" />
  <add key="DBName" value="DEMOCOMP" />
  <add key="DBName2" value="" />
  <add key="DBName3" value="" />
  <add key="DBName4" value="" />
  <add key="DBName5" value="" />
  <add key="DBUserName" value="sa" />
  <add key="DBUserPassword" value="CounterPoint8" />
  <add key="SessionTimeoutWarning" value="3" />
  <add key="SessionTimeout" value="3.5" />
  <add key="Platform" value="CP" />
  <add key="BannerImage" value="TopBannerImage.jpg"/>
</appSettings>
```

The values in these keys should be adjusted to suit the client network. Descriptions are as follows:

- *DBServer* – This is the SQL Server instance, that is used to access the accounting and ServicePoint SQL databases
- *DBOwner* – Owner of the accounting and ServicePoint databases. Usually "dbo".
- *DBName* – Name of the accounting database for the primary company. For example, "DEMOCOMP"
- *DBName2-5* – Names of the accounting databases for additional companies that technicians should be able to access.
- *DBUserName* – SQL server user name to be used to log into the database
- *DBUserPassword* – Password for the SQL server user. Access to the web.config file is protected by IIS so that this information cannot be accessed by outside html calls.
- *SessionTimeoutWarning* – This is a value, in minutes, before a popup warning will be given of an impending forced logout due to inactivity. If this value is not set, or set to zero, a default of "4" will be used. A maximum value of "9" can be set.
- *SessionTimeout* – This is a value, in minutes, before a forced logout due to inactivity is done. If this value is not set, or set to zero, a default of "5" will be used. A maximum value of "10" can be set.
- *Platform* – This allows us to call the correct tables/columns for different accounting platforms. Values are "CP" for CounterPoint, "PBS" for Passport, and "GP" for Great Plains Dynamics.
- *BannerImage* – Allows a customized company logo/image to be displayed at the top of the remote app pages. The name of the image file should be entered into the Value, including the file extension (.jpg, .bmp, etc). Tip: using a name other than "TopBannerImage.jpg" will keep our periodic updates to the app from overwriting the local image file. ***If no image is desired, setting the value to "none" will remove the image from all pages***.

** Special note regarding SMTP settings **
Some settings require enhanced permissions to be set (for example, overriding the default smtp port). If a permissions error is received when attempting to send an email via the web app, it is likely that extended permissions must be granted. Generally a "trust level" of Medium is sufficient to run the SP Mobile app. If enhanced permissions are needed for email, the trust level must be set to "Full". The full trust level must be allowed by the IIS server and can be set specifically in the app's web.config by finding the line below and changing to trust level = "Full".

```
<trust level="Medium" originUrl=""/>
```

## If you are only installing an update to the web app:

Unzip the downloaded file into the default web site directory for the existing web server. Files with the same name that are already present in the directory should be overwritten. Please review the web.config entries in the section above for any new functionality/configuration that may be available in the updated version. It may be helpful to review the release notes to locate the new features.

Registration of SP Mobile

Registration of the SP Mobile app is done through the ServicePoint desktop software. If registration is not performed, the system will function as demonstration software. The latest service pack for ServicePoint can always be downloaded and installed using the following link.
http://www.rtmcs.com/downloads.htm#ServicePointSP

To start the registration process, invoke the desktop version of ServicePoint, logging into the company for which you will be running SP Mobile. To install the registration string, invoke the function under "*Utility / Register SPMobile*".
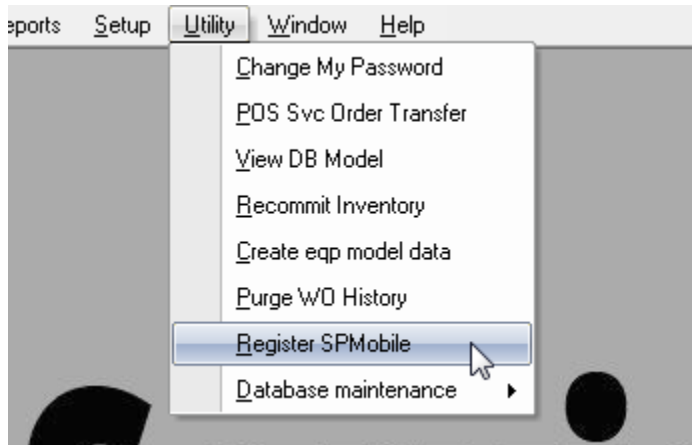
The resulting window will allow the entry of the registration string, which you will receive from us via email. To install the code, please copy the supplied string from the registration email by highlighting and pressing Ctrl-C. Then, paste the string into the text entry box in the Register SPMobile window by placing the cursor in the box then pressing Ctrl-V. You should see the registration information in the text box. Click the "Register" button to install the string.

Configuration options after installation

Configuration of some available features and behavior in SP Mobile is done the ServicePoint desktop software. You can customize some functionality of the implementation through the following items.

- ServicePoint Control Information contains a setup tab for the mobile application, titled "SP Mobile". The selections made will control some behaviors within the mobile app for all users of the current company. The options (shown below) are as follows:

- o Show button for Labor/Parts/MiscCharges/Notes/Payments/Summary - Unchecking any of these options will exclude the button for that particular function within the mobile app. For example, some sites prefer that techs do not enter or change the inventory items assigned to a job. Removing the checkmark for the Parts function will remove that button from the mobile app screens.
  - o Saving signature clocks out tech automatically – If this box is checked, saving of a signature image in the summary page of the mobile app will clock out the currently in-process labor, using the current date and time, thereby changing the work order to the default complete status.
  - o Disallow tech clock-out if no signature captured – Enabling this option will check for a captured signature image before a tech will be allowed to manually clock out of a job. If no signature has yet been saved, the tech will receive a message reminding them to obtain one before clocking out.
  - o Perform "crew" clock-in / clock-out – When this option is enabled, any technician scheduled or clocked-in on a particular day will also automatically clock in or out every other technician scheduled or already working on that same day.
  - o Allow entry of labor dispatch and return dates – This option will show or hide additional options in the Labor entry window in SP Mobile to allow users to enter the

Dispatch date/time (time a tech or crew left to travel to a site), and the Return date/time (the time a tech returns to the originating location). These dates and times can be used for travel time calculations, as well as tracking true labor costs for a job.

- o WO details page toolbar buttons – The options allow or disallow various button on the work order Details page of SP Mobile. There are options for texting the client site, dialing the client contact number from a mobile device, displaying/printing of a user-defined work order form layout, obtaining travel directions/navigating to a site, and obtaining a customer signature from the WO Details page.
- o Default signature message – The text entered here will be displayed on the customer-facing signature capture screen in the mobile app. A custom message/disclaimer can be entered to customize the intent of the signature.
- o "New WO task invoicing code" and "New WO status code" – These optional entries will assign default values that are different from the desktop defaults for any new work orders entered via SP Mobile. If no entry is provided, the standard ServicePoint desktop values will be used. Having separate options for SP Mobile is useful for easily determining new requests for service entered by technicians in the field.

- To validate users for remote login, the login ID must simply match a Tech ID from within ServicePoint. To make a Tech a valid web user, check the box under Setup/Service Techs as shown below. The password used by the tech for mobile login may be specified. On a per-tech basis, you may also make the following determinations.

- o Designate whether a technician can interact with work orders that have been assigned to others, and/or work orders that have yet to be assigned to any technician.
    - o Disallow manual time entry. If this selection is made, a technician will be allowed to clock in or out of work orders using a button for the current date/time only. Manual override/changing of the times will not be allowed.
    - o Allow or disallow the entry of new work orders by a technician. If the "Allow to add new work orders?" box is checked, a tech will have the ability to enter new service requests from the field, resulting in new unassigned work order in the ServicePoint desktop application.
    - o Allow or disallow assignment (or reassignment) of a technician other than themselves to a labor line in SP Mobile.
    - o Designate whether or not a signed in tech may enter the schedule date and/or time for a labor line that appears in SP Mobile.
    - o Pricing may be hidden on all screens in SP Mobile for specific technicians by checking the box labeled "Hide pricing on all mobile pages".

- The banner graphic at the top of each page in the web app may be customized by customizing the AppSettings key "BannerImage" in the web.config file (described above). It is recommended to use a file name other than "TopBannerImage.jpg" for your own jpg image/logo file to avoid being overwritten by our updates to the system.

- Default layouts exist for both the Work Order form displayed from the WO Details screen, and also for the emails sent to a customer upon change of status or from the WO Summary screen in SP Mobile. The default layouts can be customized by the user to fit their needs by creating and editing an .html file in the web server folder where SP Mobile is installed. The layouts can contain any valid HTML elements, including fonts, tables, colors, company logos/graphics, etc. Replaceable parameters are used to include specific ServicePoint work order information. Detailed specifications on the currently available parameters are available in the following PDF on our website.
  (https://www.rtmcs.com/pdf/ServicePoint%20Messaging%20Paramters.pdf)

    - o Displayed/Printed WO Form - Copy the file "WorkOrderLayout.Default.html" to the name "WorkOrderLayout.html". Edit the new file to customize the information that is displayed when the Display WO Form button is pressed (the "Printer" button on the work order detail screen).

    - o Customer Email - Copy the file "EmailBodyLayout.Default.html" to the name "EmailBodyLayout.html". Edit the new file to customize the information that is displayed when a customer email is sent from SP Mobile.