



Your Radar Mobile Workforce Management

KDI – Kobelt Development Inc.

Technician Training Guide

KDI – KOBELT DEVELOPMENT INC.

Your Radar Technician Training Guide

©Kobelt Development Inc.
18525 53rd Ave • #231
Surrey, BC V3S 7A4
Phone 604.574.7225 • Toll Free 1.800.661.1755



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What is Your Radar & How Will It Help You Do Your Job?



Your Radar is a cloud-based, fully customizable workforce management software that improves the efficiency and profitability of small service businesses.

For many businesses, all business functions are completed within one fixed location. However, employees of service providers need to get to their customers' homes, buildings, and properties to resolve their issues. This brings many new and different challenges for mobile employees from managing contacts, to tracking inventory, to invoicing. Your Radar was designed with its end-users in mind. First, we studied the greatest pain points and inefficiencies that mobile workers experience on the job. Then, we used these pain points to create a product to streamline the most tedious and time-consuming job tasks. Thus, Your Radar was born.



Job Site Surveys.

Your Radar allows managers to create jobsite surveys to easily keep track of key deliverables and provide training to new technicians and field employees. This surveys will allow you, as a technician, the freedom to complete your service calls worry-free, no matter how familiar you are with the job.

Contact Management.

Quickly and easily search client information, past services, type of equipment, common problems, contact customers, and generate invoices automatically within the application.



Scheduling.

Submit vacation and time off requests, receive schedule updates in real-time as jobs are dispatched, and access your schedule remotely, from wherever you are.

Timesheets.

Avoid tedious paperwork by automatically generating timesheets and invoices by checking in and out of jobs using the timesheets application.



How Will You Use Your Radar?

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Saving time shouldn't be complicated. From implementation to use interaction, Your Radar is quick to access and easy to use.

One of the greatest concerns in software development is that software that promises to improve productivity may be too complicated and end up creating more work for its users. That's why we kept the end user in mind throughout the entire process of designing Your Radar to ensure that it was as simple and intuitive as possible. This training module will allow you to master using Your Radar to make your job easier and more efficient.



Overview

The dashboard houses all of the Your Radar functions in one simple, easy to navigate layout. At the beginning of their days, employees will log into their account at <https://kdi.yourradar.net/cismobile> using their smart device.

First, technicians will open the “documents” icon to check into their vehicle for the day. In order to do so, they will select the first asset, which is a blank entry, from the drop-down menu and click “truck pick up”. This will display the truck check in survey, which will be customized for each company. This survey will provide a checklist of essential items that should be in the vehicle, as well as information and that technicians need to

begin their days.

Next, technicians will open the “jobs” icon to check their scheduled jobs for the and check in to their first one using the “timesheets” icon. The “trip” icon will then display the optimal route to their first client site based on their current location and traffic conditions. The client will receive an alert that their technician has been dispatched with an estimated arrival time. Should the technician wish to contact the client prior to arriving at the site, they may do so within the “contacts” icon, where they will simply look up the client in question and contact them directly from Your Radar.

Upon arrival at their first job, the technician will log their mileage and update their status as arrived in the “timesheets” icon. Subsequently, they would review the client file under “contacts” for any

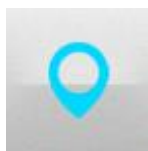
information relevant to their job, such as notes made by other technicians, past service history, and customer preferences. Next, the technician would present the customer with a pre-generated quote for the service call. Should the client accept the quote, the technician would begin their service. This would display a pre-job survey designed by the contractor or owner, which the technician would review before beginning the service call.

Should the technician need to replace a part during their service call, they would simply open the “inventory” icon and search for the specific part they need. If they did not have the part in their van, they would return to the “trip” icon, where an optimal route to the nearest hardware store could be displayed. Upon purchasing the item, they would open the “expense” tab, where they would record the price, model number, and other relevant information for the part they purchased. Next, they would reopen the “timesheet” icon, adjust their mileage to reflect the trip to purchase the missing part, as well as add the part by clicking on the “parts” button, inputting the prompted information about the equipment serviced, and then adding the parts purchased or used using the second “parts” button.

Once the job is completed and the technician checks out of the job using the “timesheet” icon, a post-job survey would be displayed, where the technician would input the required information. After the survey has been completed, the technician would ensure that the job had been completed to the customer’s satisfaction. If successful, an invoice would be generated using the data inputted in “expenses” and “timesheet”. This invoice would be sent to the customer using their contact information stored in “contacts”. Once the customer receives the invoice, the technician would process and record payment and update the job’s status to complete using the “jobs” tab. The technician would then open their next job, check in, and generate their next optimal route.

Functions

Each icon in the dashboard has specific functions that you will use to increase your efficiency and ensure that every job is done consistently and correctly to ensure maximum consumer satisfaction, and ultimately, retention.



Trip

In using the “trip” icon, you are given one of three options: scheduled, hybrid, or optimize. Once a job is received and accepted, you will receive a map from your current location to the client site. Once this map has been generated, you will be able to choose from the three options.

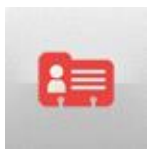
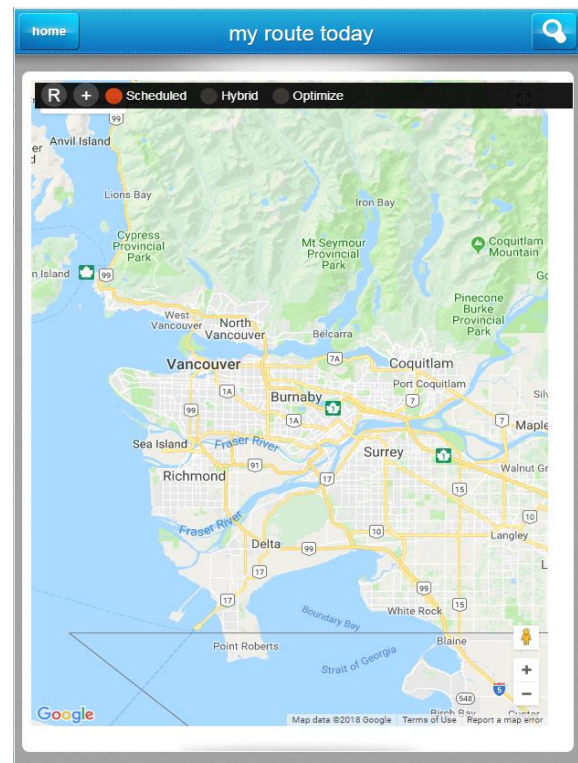
1. **Scheduled.** This will generate a route so that you arrive as close as possible to the scheduled start time for this job. For example, if a job has been entered into the Your Radar dispatch from 9am to 11am, the scheduled option would generate a route that would have you arrive as close to 9am as possible given the current driving conditions.

2. **Hybrid.** This will generate a route that gives a median amount of travel time that will both minimize driving time and optimize for arrival time at the client site. Using this option will allow you to minimize driving time while still arriving as close as possible to the scheduled start time of the job.
3. **Optimize.** This will generate the absolute most efficient route so that you arrive in the smallest amount of time possible given the current driving conditions. In this case, if you were scheduled to arrive at the client site at 9am according to the job entered into dispatch, “trip” would find the shortest route possible. Thus, you would likely arrive early, recording the minimum amount of mileage for the job.

Until a job has been assigned from dispatch, no routes will be displayed. You can refresh your “trip” using the “R” button in the top left corner of the map to reflect current traffic conditions, route information, and check for any new jobs assigned. In order to display more information about the route, you can click on the “+” button adjacent to the “R” button. This collapsible box will display relevant route information, notes, and instructions to supplement to interactive map.

Additionally, you can use the magnifying glass icon located in the top right corner of the “trip” screen to search jobs scheduled for the day by client name, job type, or location. In order to return to the dashboard, you only need to click on the “home” button in the top left corner of the “trip” screen.

Once a job has been assigned and the route option has been selected, the map will automatically adjust to any changes in traffic, weather, or road conditions, as well as any deviations made by the driver from the suggested route.



Contacts

The contacts page houses a great deal of important client information, including: service history, notes made by other technicians, contact information, client site address, and the named contact, position with the client firm, and contact information at their preferred means of communication. Should you have any trouble finding the client site or have some other pertinent reason for contacting the client, such as to provide an update on intended arrival time, you can contact clients directly, by email, using the in-app communication capabilities found by clicking the “contact client” button at the bottom of the client’s contact page, above notes. A contact

page for Kobelt Development Inc. (KDI) has been shown above. A history of correspondence between this company and KDI using the in-app communication capabilities has been recorded and is displayed below the contact at this client, Tom Kobelt. In order to return to the dashboard, you would use the “home” button in the top left corner of the “contacts” screen.

The screenshot displays the 'contacts' screen of an application. At the top, there is a blue header bar with a 'home' button on the left and the word 'contacts' in the center. Below the header, the screen is divided into several sections. The first section, titled 'Back to contact list', contains contact information for 'Kobelt Development Inc. Kdi' with a phone number '604 574 7225' and an address '#231 18525 53rd Avenue Surrey'. Below this, the name 'Tom Kobelt' is displayed with icons for a phone and email. The next section shows dates 'Jan 5, 2016' and 'Dec 1, 1998', along with a 'BC Registry Number: C-456248'. A section for 'Postal' information shows 'V3S 7A4', 'FAX: 604 574 7256', and 'STATUS: CUSTOM'. Below this is a section titled 'Communications with Tom Kobelt'. The 'LOCATION MAP' section shows a map of the area around Cloverdale, British Columbia, with a red pin indicating the location. The 'CONTACT CLIENT' section features an 'Email' input field and a 'Send' button. At the bottom of the screen, there is a blue bar with the text 'Kobelt Development Inc' and a 'top' button.



Diary

You can choose to record information relevant to your past, current, and future jobs using the “diary” application using four pre-set forms. This information is only available for you to review yourself, and cannot be accessed by other technicians, clients, or dispatchers.

1. **Timesheet.** Once a job has been completed to the customer’s satisfaction, a timesheet must be created in order to generate an invoice. You must record the client’s account name, date and time that the job was started, amount of time spent on the job, and the end date of the job. Additionally, you may choose to include remarks, such as details of the job completed, any issues that may have arisen and how they were resolved, and any parts purchased or used for the job.

2. **Notes.** You may choose to record notes associated with the job you have started or completed. These notes may be relevant to the nature of the job, issues that may have arisen and how they were resolved, specific instructions associated with client preferences or site location, etc. Should you choose to record notes, you must include the name of the client account, the date that the note was recorded on, and the note itself under “remarks”.
3. **Recommendation.** During a job, you may recommend that a client upgrade their equipment, have another type of service done, or simply realize that the client has inefficient systems or experiences persistent problems with the same (or very similar) solution. In any of these cases, you would simply record their recommendations in the “diary” screen, including the name of the client’s account, the date the recommendation was made, and the recommendation itself under “remarks”.
4. **Task.** Should you have comments related to the job or work tasks that you have completed for clients, you would record it under “tasks”. This form can be used to record notes on methods of making the job more efficient, best practices, or methods that have not been successful and that should be avoided.

The screenshot shows a web application titled "my diary" with a blue header. Below the header, there are three tabs: "Timesheet", "Notes", and "Task". The "Notes" tab is selected, and a sub-tab "Recommendation" is visible. The form contains the following fields:

- Who is it for? (Text input: Type or say: company name)
- When was it done/noted? (Text input: Type or say: May 22 2018)
- What time? (Text input: Type or say: 10 30 AM)
- For how long? (Text input: Type or say: 1 hour 30 minutes)
- Complete by (future date) (Text input: Type or say: May 22 2018)
- Remarks (Text area)

At the bottom of the form is a blue "ADD" button. Below the form, there are two links: "View more" and "View Task only". The footer of the application says "Kobelt Development Inc" and has a "top" button.

Additionally, you may use the “diary” screen to search all notes made using the “view more” button at the bottom left of the note-taking screen, or specifically search your tasks using the adjacent “tasks only” button.



Job

The “job” application is one of the screens that will be most commonly used. This application houses all past, current, and future jobs that will you will be dispatched for. By selecting the “monthly planner”, you can display a monthly calendar and select days to review. For example, to view jobs scheduled for June 22nd, you would click on the grey monthly planner bar on the top left of the jobs screen. This would display the current month’s calendar.

To navigate between months, you should use the “Prev” and “Next” arrows found at the top left and right of the monthly planner. Once June has been located, you would click on the 22nd to review the

jobs scheduled for that day. If jobs have been scheduled for the day, there will be a small number in the top right corner of the day, representing the number of jobs scheduled for the day.

When satisfied with the chosen day, click on your chosen date to exit the monthly planner. This will display the jobs scheduled for this particular day. If the jobs on the displayed day have been marked as “complete”, they will be highlighted in green. Jobs that are not highlighted in green have not been marked as “complete” and should be reviewed and set as “complete” when the job is concluded.

To check in to a job, you will open the job menu, select your first job by clicking on it, and launch a map by clicking on the client address. Once you have generated your map and are ready to leave for the client site, you will check into the job by clicking on the “start timer” button under the selected job in the jobs application. This will generate a new timesheet for this job and begin a running clock of your billable hours. When you have completed the job, you will return to the job application, reopen the job, and click stop timer. This will open the timesheet for the job.



Timesheet

The timesheet application houses all billing and invoicing information for dispatched jobs. This application will allow you to review past timesheets and invoices, create new timesheets, and view a summary of all past timesheets recorded.

To review past timesheets, open the timesheets application and click the “view details” button on the job you would like to review. This will display the job’s status, notes, start and end time, billable hours generated, and the truck or asset used for the job. If you would like display the parts used, equipment serviced, or the invoice, click on the blue “summary” button on

the bottom left corner. This will display the customer invoice. The first section of the invoice contains labour information, including the type, quantity, and subtotal for the hours of work performed. The next section provides an overview of the equipment that was serviced and parts that were used for the job. Each part used will be listed, including its quantity, name, and unit price to generate a subtotal price for the parts used.

New timesheet for

Project*: ☐ My ☒ Recent
☐ All ☐ Near by

Show/hide details

Job Start Time*:

Ends next day: ☐

Job End Time:

Billable:

Further Review: ☐

The total invoice amount displayed is the sum of the labour and parts costs with applicable taxes. A copy of the signed invoice is emailed to the customer and manager after being submitted by the technician.

To enter a new timesheet, simply click on the “add a new timesheet” button at the top of the timesheets homepage. This will prompt you for information concerning the job that the timesheet is for. A job can be selected from the drop-down menu under “project” and the job start time and truck should be selected. Once these fields are filled, click on the save button. When the job is completed, return to the timesheets application and click on the job’s “details” button to re-launch it. To complete the job, input the end time, billable hours, and details of the job. When the invoice has been generated, signed off on, and payment has been collected, return to the timesheet details to complete the job. Use the select a status drop-down menu to change the job’s status to “complete”.



Documents

The first thing that you will do every morning is check into your vehicle for the day using the documents application. In order to do so, you will launch the documents application and select the first asset, which is a blank entry, from the drop-down menu and click “truck pick up”. This will display the truck check in survey, which will be customized for each company. This survey will provide a checklist of essential items that should be in the vehicle, as well as information and/or tasks that you need to begin your days. When the survey has been completed, you will submit it using the “submit” button at the bottom of the survey.

home checklist

Back

Personal belonging you may need, lunch, extra clothes and cell phone.

☐ Yes
☐ No

Drill/driver combo and recip saw. Zone 6 or 8

☐ Yes
☐ No

Power tool bin Zone 7 - drill, saws jig and circular, sander, construction screws, pencils, small square, and tape measure

☐ Yes
☐ No

Quick repair bin - Vicerip plyers, 5/16" drivers, large screw driver, electric tape and utility knife.

☐ Yes
☐ No

Message Dispatch

SEND

URGENT

Recent Message

1 Sep, 17 4:15 PM Urgent

Pricelist

Flagging

▼

Job Code	Description	Best Price Today	Gold Card Member	Secondary Add	Platinum
APP-0003-0010	Shut Down Drain & Refill Apartment Riser to Replace Appliance Hosebib	62.50	48.30	41.65	46.20
APP-0004-0025	Shut Down Drain & Refill ENTIRE Apartment to Replace Appliance Hosebib	84.00	76.65	65.02	72.98
APP-0005-0030	Diagnostics for Appliance Not Functioning Without Further Repairs	73.50	67.20	57.23	64.05

The documents application also allows you to message your dispatcher and browse a job pricelist containing estimated prices for all jobs that you may receive. Any messages sent to the dispatcher have the option to be labeled as “urgent” by click on the red urgent button after composing the message. All past messages sent to dispatch are recorded underneath the message box. As you can see in this example, the last message sent to dispatch was on September 1st, 2017 and it was marked as “Urgent”.

The pricelist contains estimated prices for each type of job performed. The pricelist is sorted by job category, with specific job listings in the pricelists for each specific job. Each system can be customized to display different pricing options. In the case that your system has multiple pricing options, consult your manager for the significance and occasion of use of each price.



Expense

The expenses application allows you to record your mileage, spending, and submit receipts for reimbursement. Opening the expenses application will display a list of all past submitted expenses. To review past expenses, click on the grey “edit” button. This will allow you to change the entry, assign the expense to a job, and by clicking “continue”, take a photo of the receipt using your smart device or upload a file. When satisfied with the upload, you will click the grey “upload now” button. This will return to the edit page, where you will click on the grey “save” button when satisfied with the entry.

home

my expense

Date*: 2018-05-06

Expense Type*: ▼

Amount: \$

Mileage: Km

Note:

My

Recent

Project (optional):

All

Near by

Save

Continue

To submit a new expense, you will click the blue “add an expense” button. This will prompt you to select the type of expense, enter the amount, mileage, or both. Once these fields are filled, you will assign the expense to an open job using the project drop-down menu. When you are satisfied with this information, you will attach documents by clicking on the blue “continue” button. Here, you can either upload a photo using your smart device or a relevant file and click the “upload now” button. You will then be returned to the new expense page where you will click the blue “save” button.

Vacation



The “vacation” application allows you to request time off, including vacation, sick days, and long-term absences.

Opening the vacation application displays a list of all past vacation requests. To edit or check the status of a past request, click on the grey “edit” button of the desired request. This will prompt for the leave type, start and end date, and a written description of the reason for the absence. When the entry is complete click on the blue “save” button to send the vacation request to your supervisor. Your supervisor will then receive a notification of the request by email with the option to approve or deny it. You will be notified by email, using the email associated with their Your Radar account, of any changes in the status of your vacation request. Additionally, status changes will be reflected in Your Radar in the request listing in the vacation application next to “status”.

home my leave requests

12 leave request(s) found

[Add a new request](#)

Sick Leave on 2017-01-30

Status: Requested

[Edit](#) [Delete](#)

Taken ill over the weekend. Requesting for ONE day sick leave.

Vacation on 2016-12-28 to 2016-12-30

Status: Approved

Leave - Year End Holidays

Vacation on 2016-12-06

Status: Requested

[Edit](#) [Delete](#)

Neywan is not doing well and Farvin has a road test. So, I have to look after Neywan.

Sick Leave on 2016-11-14

Status: Approved

Recovering from Flu.

Vacation on 2016-10-10

Status: Requested



Inventory

The inventory application displays a list of all inventory items and parts that have been entered into the system and are or have been in stock in technician vehicles, warehouses, and other storage centers.

home inventory

Item Name

[Show All](#)

384 record(s) found

1/2" Copper 90 [Order](#)

QUANTITY: 10.0000 COST: 0.0000

1/2" Copper Fitting 90 [Order](#)

QUANTITY: 2.0000 COST: 0.0000

1/2" Copper Coupling [Order](#)

QUANTITY: 10.0000 COST: 0.0000

1/2" Copper 45 [Order](#)

QUANTITY: 3.0000 COST: 0.0000 STATUS: Open

The inventory application allows you to re-order parts that are out of stock in the technician vehicles. If you have used the last item, search it using the search bar at the top of the screen and click on the grey “order” button. This will then prompt you for the vendor that you would like to order the item from. When you have selected your vendor, click on the grey “place order” button. This will generate an open order for the system administrator to review.



Personal

The “personal” application allows you to review and modify your personal information stored in Your Radar. You may change your username, display name, and password using this application. Changing the username and display name from the technician portal will also change the information in the administrative portal.

The screenshot shows a web application interface for updating personal information. At the top, there is a blue header bar with a 'home' link on the left and 'My Information' on the right. Below the header, the main content area has a title 'You can update your personal information here!' and a sub-instruction 'Complete all sections of this form!'. The form contains five input fields: 'Name*' with the value 'Sachin', 'Username*' with the value 'SS', 'Password*', 'New Password*', and 'Retype Password*'. Each field has a small asterisk indicating it is required. At the bottom of the form is a blue button labeled 'Change'.

YOURADAR