Motivity Workforce

Motivity
Mobile Workforce Software

The complete electronic job management system to replace all of your field paperwork.

Workforce for your Office

For admin and operational staff responsible for managing and allocating jobs:

Motivity Workforce is a secure UK-based office portal hosted in the Cloud, which allows you to create forms and job sheets unique to your business and requirements.

- Create a database of customers, sites, equipment and jobs, allowing you to record, track, and search for information, including site visit history, details of customers with multiple sites, equipment at each site, as well as a comprehensive list of your own products and services.

- Create your own custom forms, and create new jobs quickly and easily using a step-by-step job creation wizard.

- Schedule visits using an on-screen 'drag and drop' planner which is updated in real time, enabling you to see job progress and prevent double booking. It also sends you email alerts when jobs are complete.

- See job progress from when a job arrives on the handheld through to job completion.

- View issues that require attention, enabling you can take appropriate action to meet your KPIs.

- Capture information required to prove compliance such as "start of day' and 'end of day' vehicle checks, compulsory risk assessments, and other important reports.

- Protect client and business data with office-controlled password protection, and encrypted transmission. This ensures information held on the device cannot be accessed if the device is lost or stolen.

Workforce for Mobile Workers

Used by field staff to receive and complete any kind of field 'paperwork':

The Motivity Workforce App enables you to send and receive jobs electronically via the mobile phone network or Wi-Fi network, from anywhere in the world, using standard Android Smartphones / Tablets and Apple iPhones / iPads.

- Use even when there is poor or no mobile signal, as Motivity automatically synchronises when the signal returns.

- Focus on the job at hand with an electronic form that is easy to follow and complete with mandatory questions, simple tick boxes and dropdown boxes.

- Use third party forms and 'paperwork' when required, such as inspection forms, certificates, or the customer's documents, which can be added as electronic templates.

- Record specific checks, readings and notes, and decide which questions to ask based on the type of job. You can even add new assets during installation.

- Record parts used on the job, taken from the van or central store. Use barcodes for quicker recording. Search the parts database, for a quick reference of parts used and available.

- Capture customers and field staff signatures on screen at job completion as proof of delivery.

- Take photos during each job and add your own captions. Photos are automatically sent back to the office with each job.

- Attach files created using other apps on your phone such as sketches, word documents, notes and PDFs.

Motivity is used daily by field workers across the UK and Ireland to record:

installation

service & maintenance

repairs / call outs / breakdowns

audits

deliveries

inspections

certifications

commissioning

collections

surveys

"It has revolutionised the way we work. We have managed to dispense with the old paper forms and now everything is electronic."
R&MA Stewart

"We want our customers to see that we are professional, efficient and reliable"
Fireserv uk

"I can't think of anything they can improve on this. It just ticks all our boxes."
JTM Service Limited

www.motivitymobile.com

Motivity Workforce Features

Workforce for your Office

Getting Set Up

Multi-Site Customer Database
Manage details for customers, multiple sites, contacts. Record site specific notes such as hazard information.

Customer Equipment Database
Record details of equipment installed or maintained at customer sites. Set up your own custom questions to be asked when your service team visit each site. Access previous visit history.

Products and Services
Manage details of the products and services you sell/offer - making it easy for field staff to pick and choose parts they have used during on-site visits. Keep track of stock items at different locations, such as central stores, van stock etc.

Customise to Suit your Own Jobs
Tell Motivity what types of job you carry out and what information you need to record or capture, including photos, signatures, optional and mandatory information.

Use Existing Job Sheets
Produce PDF job sheets for each completed visit.
Motivity can recreate existing paper job sheets in electronic format so you get going even quicker and maintain corporate style.

Add other Field Paperwork
Configure Motivity to provide any other forms your field workers need, such as: Inspection sheets, service sheets, and delivery notes.

Compliance / Legal Requirements
Option to set-up and include daily vehicle checks, risk assessments, and 'end of shift' reporting.

Managing New Jobs

Raising New Jobs
Wizard style screens help office staff quickly raise jobs for existing customers.

Drag and Drop Scheduling
Allocate jobs using the Motivity drag and drop schedule / planner board. Jobs are colour coded for easy recognition.
Can customise what information you see for each planned visit.

Sending Jobs to Field Workers
Send jobs to field staff as soon as scheduled, either individually or in bulk.

Monitoring Existing Jobs

Real Time Updates
Monitor job progress on the Schedule Board, which provides updates in real time.

E-mail Alert on Job Completion
Find out immediately when jobs are completed by your field workers. Receive completed work sheets via email if required.

Dealing with Exceptions

Staff Too Busy? Job No Longer Required?
Re-allocate jobs or cancel them if necessary, using an easy-to-use Schedule Board.
Document why actions have been taken. Field staff are notified automatically.

Need to Order Parts? Schedule a Return Visit?
Build in your own custom field checks that can trigger alerts on Motivity Office Dashboard.

Jobs Not Started?
Use the Dashboard, which can be customised to suit your requirements, to keep informed of jobs not going to plan.

Processing Completed Work

Visit Reports
View field reports as soon as they are completed. Each visit is recorded against each customer site for future reference.

Professional PDF Job Sheets
Automatically generate PDF job sheets and other field paperwork, using any information captured in the office and field, including signatures and photos. Build multi-page PDFs from different templates and e-mail direct to customers.

Integration

Require information to be transferred to or from other computer software? Flexible options are available for integrating Workforce directly with office systems such as MS Dynamics, Sage 200, SAP Business One, Siebel CRM, Greentree and bespoke database systems.

Technical

Workforce Office utilises major hosting companies to provide the best service for our customers - Rackspace data centres in London and Amazon data centres in Ireland.
It can be accessed using standard web browser on Windows and Mac desktop computers.

Motivity Workforce Features

Workforce Mobile App

Getting Set Up

Quick Install
Download the Workforce app from Google Play Store. Field staff use unique e-mail and password, which you control.
The app will then configure itself automatically.

Jobs to Do

Today Screen
View outstanding work, categorised by type of job.
View job map showing location of each job.
Get helpful tips such as alerts and advice when using device without an Internet connection.
Option to set up outstanding vehicle checks and 'end of day' reports.

Job Details and History
View full details about a job together with its location on a map. Includes site info and hazard warnings.
Include history of previous visits so that field staff are better informed before they arrive.

Job Reporting

Simple Workflow
Each job is presented in workflow format making it easy to follow and complete.
Configure questions presented, and set mandatory questions to ensure form is completed before job sheets can be sent back.

Capture Photos
Take or add photos to each job together with captions. Ideal for proving misuse or work complete.

Parts Used
Search and add items from van stock or other stores.
Use barcodes for quicker and more accurate reporting.

Live Stock Search
View stock held by other field workers or stores when a particular part is required to complete a job (requires a signal).

Equipment Audit

Add new assets and equipment whilst on-site.

Equipment Checks
Record inspection, servicing and maintenance checks for any on-site equipment. Set up questions for each equipment type.

Ad Hoc Forms
Build your own ad-hoc forms that field staff can add and complete when they are on site. Ideal for when additional information is required on some jobs, or for specific customers.

Create 'Out of Hours' Jobs
Option to allow field staff to create their own jobs. Ideal for out of hours and emergency work.

Capture Signatures
Configure to capture a single customer signature at the end of a job or signatures for each stage of a job.

Time Recording
Capture travel time, work time, and mileage.

Parts or Work Required
Configure questions that will alert office staff should further action be required at a site.

No Signal? No Problem!

Use Motivity even where there is little or no mobile or Wi-Fi signal. Jobs are sent automatically when there's a signal.

Stay Compliant

Vehicle Check
Ensure staff complete vehicle checks before they can start their first job of the day. Alert office staff of any defects reported.

Risk Assessments
Prompt for risk assessments checks to be completed at the start of each job - when on site.

End of Shift Reports
Add prompt for report sheet to be completed at the end of the day or shift.

Secure

Each field worker requires a PIN login controlled by the office. Data is stored securely on the device, and transmission to and from the office is encrypted. There is no direct connection to your office systems.
A remote wipe facility clears down all job information from the device.

Easy Administration

Pain Free Redeploy
Replace lost, or damaged devices with ease. Once the app is reinstalled, it will automatically reload with any outstanding jobs.

Help in the Field
If your field staff need help or have questions, our UK Support team are here to help.

Supported Devices

Android smartphones and tablets (Android version 4.0 or newer).

Apple iPhones and iPads (iOS 11 or newer)

Price List

Monthly subscription cost per office / mobile user (ex. VAT)

Number of Users	1 Year Contract
5 to 10	£35.00 each
11 to 30	£30.00 each
31 to 50	£25.00 each
51 to 100	£22.00 each
101 to 150	£19.00 each

A minimum of five licenses are required (e.g. 1 x office and 4 x mobile users)

Our subscriptions include:

- FREE remote set-up
- FREE conversion of your paper job sheets to electronic versions*
- Unlimited jobs, photos and forms for your teams
- Unlimited telephone helpdesk support from our offices in Sheffield
- Unlimited e-mail support
- Free updates

    * we convert one job sheet or small form FREE of charge for each user subscription you take out. E.g. 5 users = conversion of five different small forms / job sheets. There is a one-off charge for each additional form conversion over and above this.

Contact us for pricing on:

- Bespoke / customisation work
- Integration into your own back office software
- Training & on-site consultancy
- Larger user subscriptions (e.g. 150 + users) & longer contracts

Notes

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FREE TRIAL

Send us your existing paperwork and we'll do the rest.

To take advantage of our free trial.

Call us on
0114 243 5544

The free trial gives you unrestricted use of the office and mobile software.

Motivity
Mobile Workforce Software

Head Office

Appstation Ltd,
35 Jessops Riverside,
Brightside Lane,
Sheffield,
S9 2RX

UK Sales & Support

0114 243 5544
Monday - Friday
8:30am - 5:00pm
Excluding Bank Holidays

Our phone line is available
24 hours, every day
for you to leave messages

Motivity brought to you by Appstation Ltd.

www.motivitymobile.com