

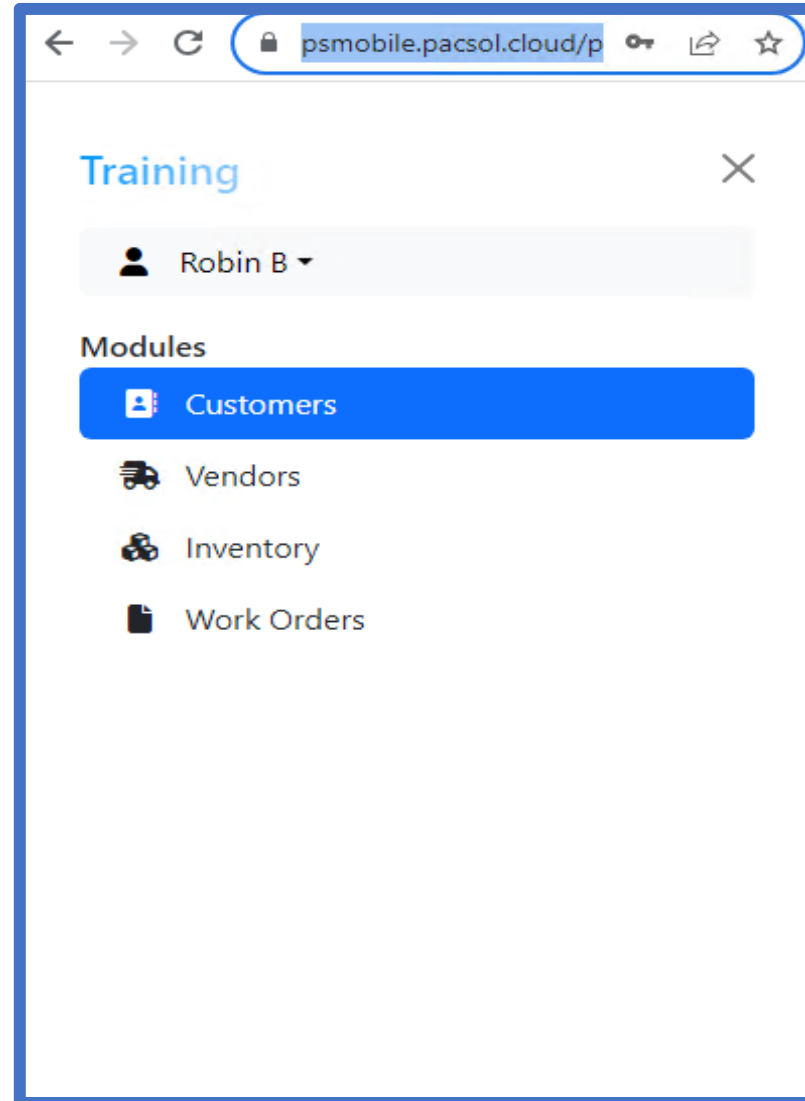


# PS Mobile

Work Orders and So Much More...

Robin Biffath

# New Look





# PM and QA

See the Customer, Vendor and Work Orders


# Project Managers

Need to follow up with Customers?


Onsite review of the Work order


Checking stock at the job sight

## Modules

 Customers

 Vendors

 Inventory

 Work Orders

# Minimize Internal Communication



## **Customer**

- Locked out
- Need approval for add Scope of work

## **Vendor**

- Where's the material?
- Is there material for additional Scope if a PO is generated?

# Customer



☰ Customers 🔍

ICU  
1215 New place Dr, Costa Mesa, CA 90156 >

Installer  
1 we are here, CARLSBAD, CA 92026 >



ICU ✕

**Address**  
1215 New place Dr, Costa Mesa, CA 90156

**Customer ID**  
727

---

**Home/Company Phone**  
(760) 237-8053

**Email**  
bestCS@icu.com,supportrep@pacific-solutions.com,support@pacific-solutions.com

# Vendor File



Vendors	
300 Flooring Installations 978 Weaver Place, Victoria, BC V9C7A4	>
346343 ..	>
A & J TRUCKING PO BOX 3712, LA HABRA, CA 90632	>
A-1 Carpet Service 515 Longmere Drive , Kent, OH 44240	>
A. Job Closer ..	>
A&R FLOOR COVERING ACCESSORIES 23011 MOULTON PARKWAY, STE C-5, LAGUN...	>
Ace Tile Installer 7777 Living Large Lane, Arvada, CO 80002	>



## BENTLEY PRINCE STREET

**Address**  
PO BOX 203897, DALLAS, TX 75320-3897,

**Customer ID**  
32282

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**Order Dept Phone**  
800-423-4709

**Email**  
customer@bentley.com

**Account #**  
137



# Inventory

Stop the Calls see the Stock




# Inventory

More material is needed





Is it a stock item or was it ordered for the Job?

What is the current availability in the Warehouse?

## Training ✕

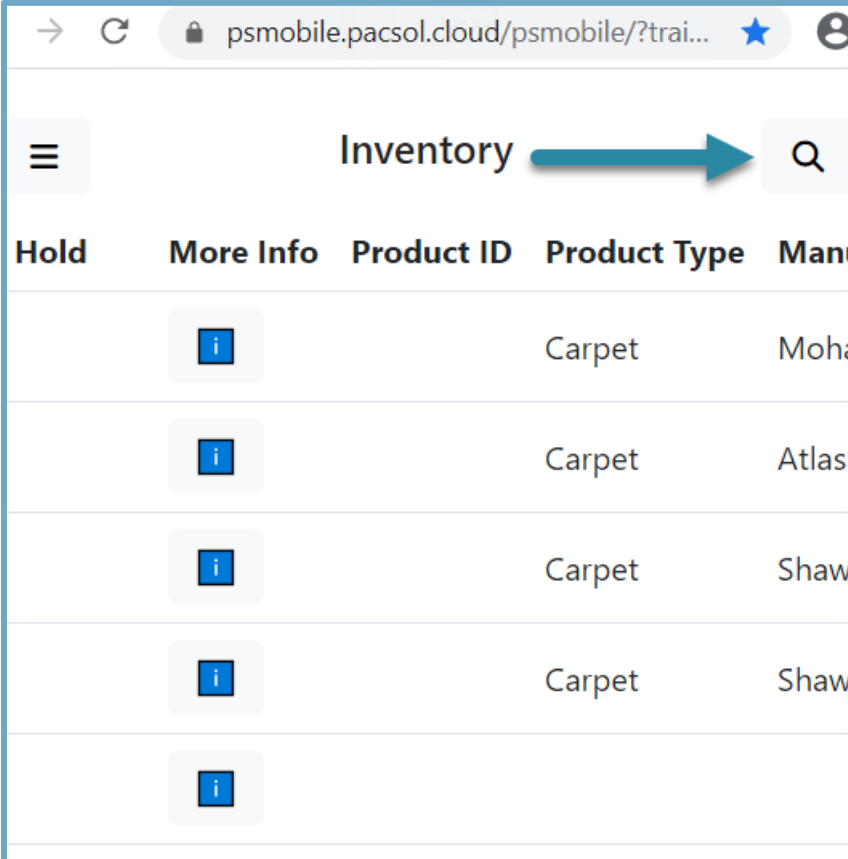
 Robin B ▾

### Modules






-  Customers
-  Vendors
-  **Inventory**
-  Work Orders




# Inventory

When more material is needed using the magnifying glass to open the Search fields.



The screenshot shows a mobile web browser interface for an inventory system. The browser's address bar displays the URL `psmobile.pacsol.cloud/psmobile/?trai...`. The page title is "Inventory", and a magnifying glass icon is highlighted with a blue arrow. Below the title is a table with the following columns: "Hold", "More Info", "Product ID", "Product Type", and "Manu". The table contains five rows of data, each with a blue information icon in the "More Info" column.

Hold	More Info	Product ID	Product Type	Manu
			Carpet	Moha
			Carpet	Atlas
			Carpet	Shaw
			Carpet	Shaw
				

psmobile.pacsol.cloud/psmobile/?trai...   

### Search ✕

Product ID

Product Type

Manufacturer



Style






Color

Inventory #

Sidemark













 **Inventory** 

Product ID	Product Type	Manufacturer
	Carpet	Bentley
	Carpet	Bentley
	Carpet	Bentley
	Wall Base	BURKE MERC
	Ceramic Tile	CROSSVILLE

Inventory				
On-Hand	Sellable	Available	Unit	Width
			SF	
			SF	
			LF	
2	2	2	EA	
1	1	1	EA	
1	1	1	EA	
3	3	3	EA	
2	2	2	EA	

If the material is Sellable it can be held

	2793	Carpet	Ben
	2793	Area Rugs	Ben
<b>Hold</b>		2793	Carpet Ben
<b>Hold</b>		2793	Carpet Ben
	2794	Carpet	Ben
	2794	Carpet	Ben
	2794	Carpet	Ben
	2795	Carpet	Ben
<b>Hold</b>		2795	Carpet Ben
	2796	Carpet	Ben

# Holding Material



- Place on hold until the job/work order can be updated to include the Additional material
- Then the hold can be cleared, the material allocated and delivered to the job.

A screenshot of a web application form titled "Place a Hold on Kings Road 8kr42000t". The form has a white background and a blue border. It contains three input fields: "Quantity", "Description", and "Days to Hold". Below these fields is a prominent blue button labeled "Submit Hold". The form is set against a dark blue background, suggesting it is a window or modal dialog.

IMPORTANT

FIX  
THE JOB



# Work Orders

PM's and Installers Too

## Work Order Access

It lands on a blank screen if nothing is scheduled for that day using the Magnifying glass the ability to filter to what is needed is used



Work Orders



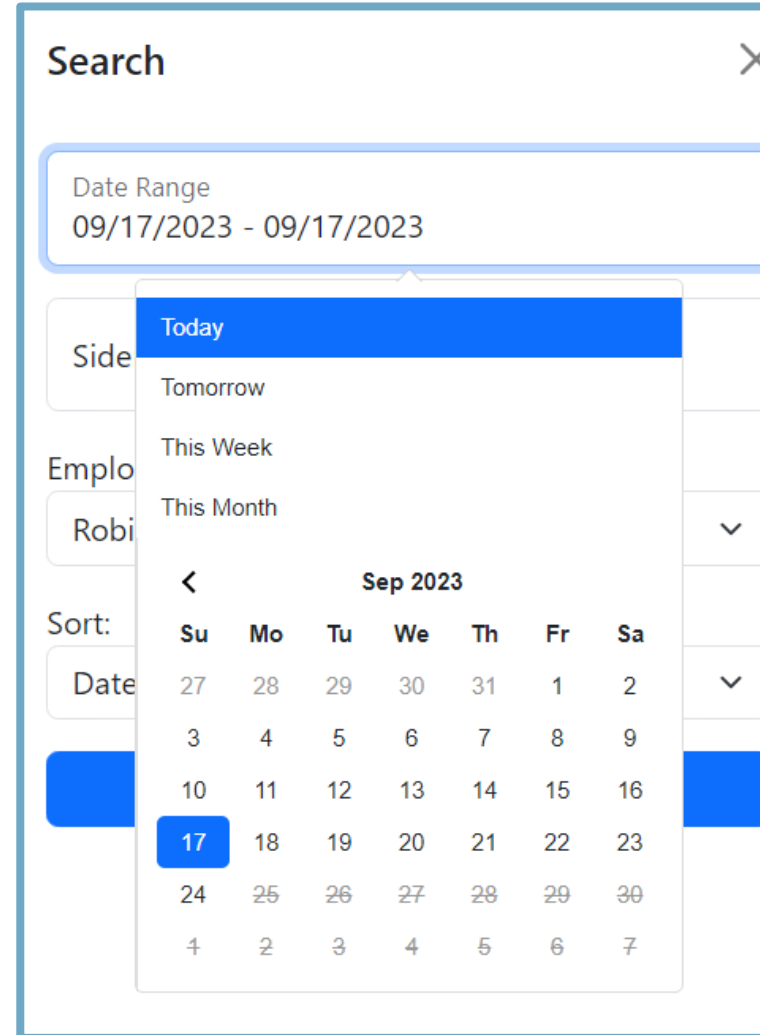


# Locate the List

There are some predetermined search options

- Today
- Tomorrow
- This Week
- This month

Depending on the access granted the user may not have the ability to see the calendar farther than a set number of days (note the lines through the date after the 25)



The screenshot shows a search interface with a 'Date Range' field containing '09/17/2023 - 09/17/2023'. Below this, there are several search options: 'Today', 'Tomorrow', 'This Week', and 'This Month'. The 'Today' option is highlighted in blue. To the right of these options is a dropdown arrow. Below the search options, there is a 'Sort:' section with a 'Date' dropdown. A calendar view for 'Sep 2023' is displayed, showing dates from 27 to 7. The date '17' is highlighted in blue. The calendar view is partially obscured by blue bars on the left and right sides.

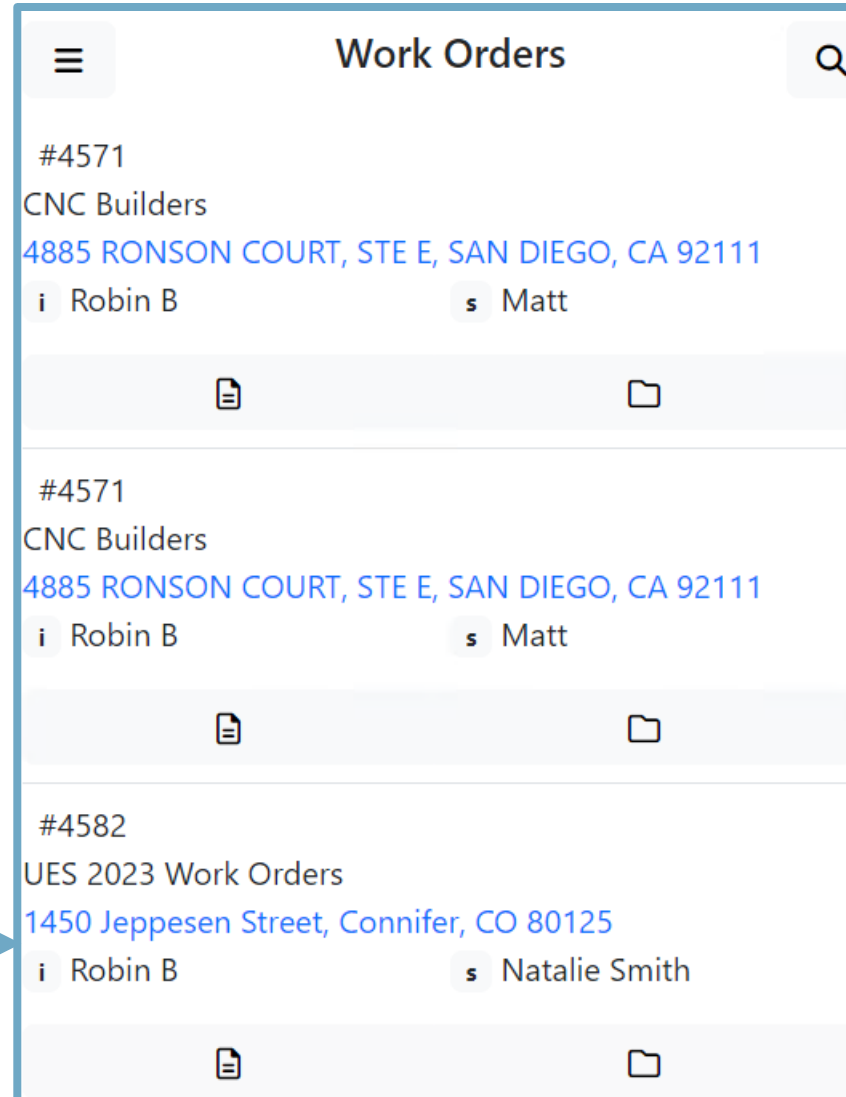
Sep 2023						
Su	Mo	Tu	We	Th	Fr	Sa
27	28	29	30	31	1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
1	2	3	4	5	6	7

## Using the Set

After the date range is selected a list will appear with jobs that fall in the range.

From this View the Work Order, Sidemark, Installer and the Salesperson are shown

To obtain directions to the Job site click on the address



**Work Orders**

#4571  
CNC Builders  
[4885 RONSON COURT, STE E, SAN DIEGO, CA 92111](#)  
i Robin B s Matt

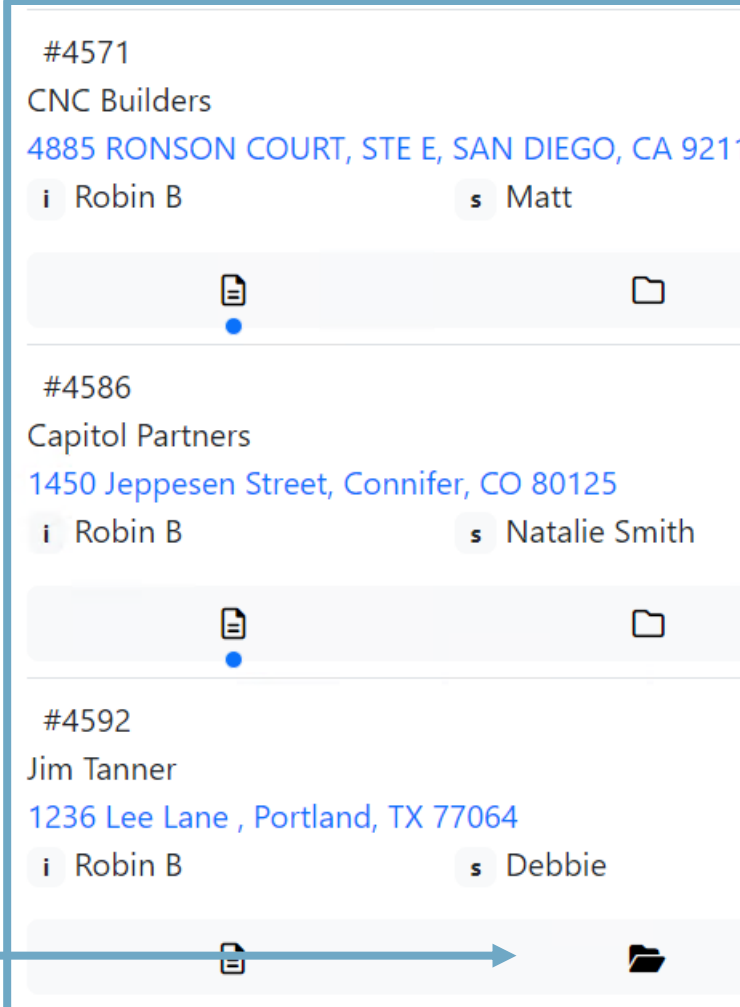
#4571  
CNC Builders  
[4885 RONSON COURT, STE E, SAN DIEGO, CA 92111](#)  
i Robin B s Matt

#4582  
UES 2023 Work Orders  
[1450 Jeppesen Street, Connifer, CO 80125](#)  
i Robin B s Natalie Smith

# Using the Set

Documents that are needed for installation can be seen on the app also if a file is present the folder is open and dark

Things like diagrams.



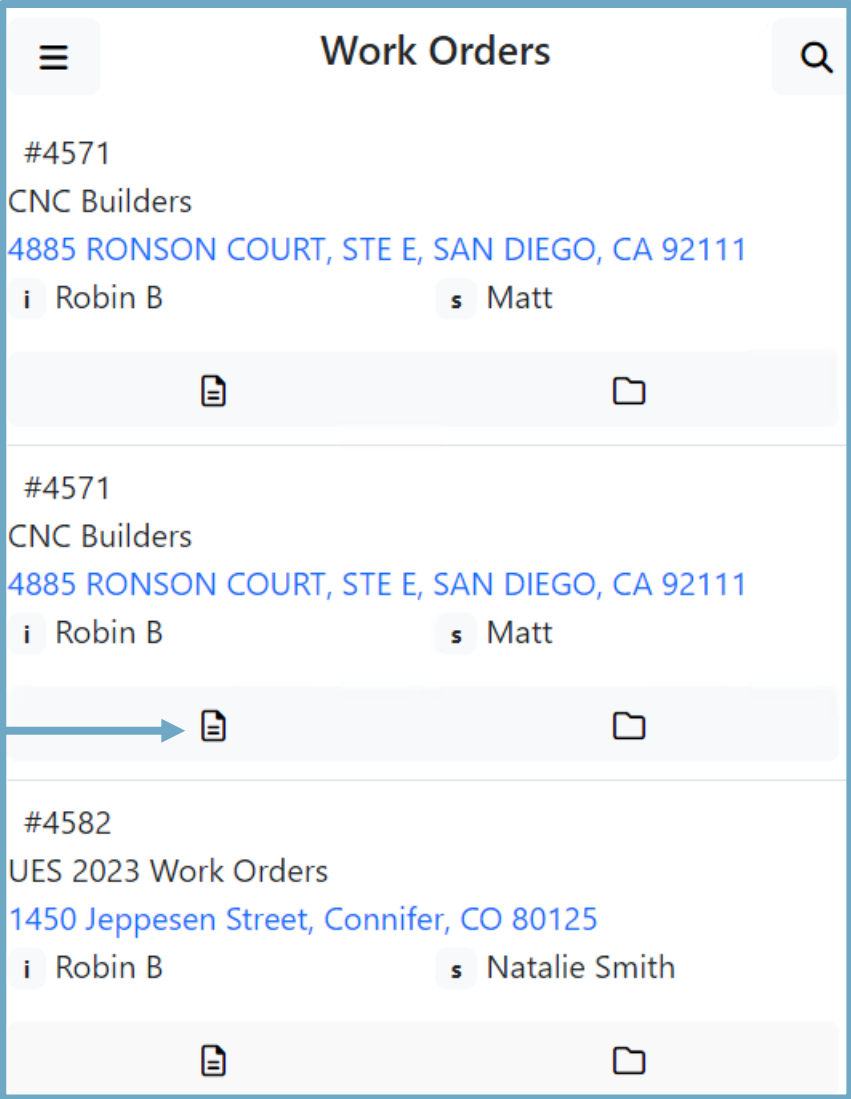
#4571  
CNC Builders  
4885 RONSON COURT, STE E, SAN DIEGO, CA 92111  
i Robin B s Matt

#4586  
Capitol Partners  
1450 Jeppesen Street, Connifer, CO 80125  
i Robin B s Natalie Smith

#4592  
Jim Tanner  
1236 Lee Lane , Portland, TX 77064  
i Robin B s Debbie

# Using the Set

To view the Work Order details simply click on the paper icon

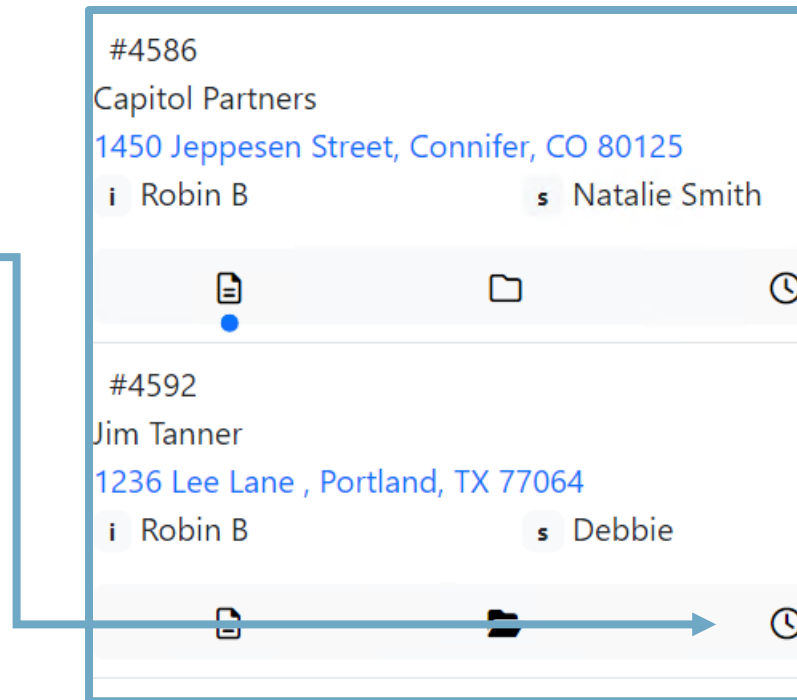


The screenshot shows a mobile application interface titled "Work Orders". It features a list of three work order entries. Each entry includes a work order number, a company name, an address, and two user names. Below each entry is a light gray bar with two icons: a document icon (referred to as a "paper icon" in the text) and a folder icon. A blue arrow originates from the text on the left and points directly to the document icon of the second work order entry.

Work Order #	Company	Address	User 1	User 2
#4571	CNC Builders	4885 RONSON COURT, STE E, SAN DIEGO, CA 92111	Robin B	Matt
#4571	CNC Builders	4885 RONSON COURT, STE E, SAN DIEGO, CA 92111	Robin B	Matt
#4582	UES 2023 Work Orders	1450 Jeppesen Street, Connifer, CO 80125	Robin B	Natalie Smith

# Using the Set

To view the Time Tracking details is an clock icon



# Viewing the Work Order



- See the Sold To and Ship To
- Material Quantity (no costs)
- The labor Quantity
- Cost per unit
- Total per line
- Total for the Work order

Quantity	Labor Description	Area	Cost	Total
undefined				
<b>VCT</b>	Line #0			
<b>Materials</b>				
450 SF	Imperial Texture 1/8" Gauge	51812 Lemon Yellow		
<b>Labor</b>				
450 SF	Install VCT Standard		\$0.50	\$225.00
<b>VCT</b>	Line #1			
<b>Labor</b>				
15 HR	Standard Floor Prep		\$30.00	\$450.00
<b>Labor Cost Total: \$675.00</b>				



# Subcontractors

Editing and Submitting

# Processing the Labor



- When the installer is ready to be paid there are 2 options
- if everything went as planned simply click Submit

A screenshot of a web application window titled "Work Order #4582". The window contains a form with a status indicator "Not Submitted" on the left and two buttons, "Edit" and "Submit", on the right. The "Submit" button is highlighted with a blue starburst graphic. Below the buttons, the text "Work Order" is displayed in a large, italicized font. Underneath, the address "One Point Floors, 22822 Granite Way Suite, Laguna Hills, CA 92653" and phone numbers "949-297-3760 949-297-3761" are listed. At the bottom, there are two input fields: "Sold To" with the value "Capitol Investments" and "Ship To" with the value "UES 2023 Work Orders".



# Processing the Labor



- if everything did not go as planned then the Edit option will need to be used.
- This could be due to partial completion of work or when additional labor or material was needed.

Work Order #4582

Not Submitted

**Edit** Submit

*Work Order*

One Point Floors  
22822 Granite Way Suite  
Laguna Hills, CA 92653  
949-297-3760 949-297-3761

Sold To Ship To

Capitol Investments UES 2023 Work Orders

A screenshot of a software interface for a work order. The window title is "Work Order #4582". At the top left, there is a document icon and the text "Work Order #4582". Below this, there is a status bar with a "Not Submitted" button on the left and "Edit" and "Submit" buttons on the right. The "Edit" button is highlighted with a blue starburst graphic. Below the status bar, the text "Work Order" is displayed in a large, italicized font. Underneath, the address and contact information for "One Point Floors" is listed. At the bottom, there are two columns: "Sold To" with a text box containing "Capitol Investments" and "Ship To" with a text box containing "UES 2023 Work Orders".

# Processing the Labor

## Change the Quantity on the line

- The line can be adjusted
- a note on why included

Contact / Phone

Project Plan

Labor Vendor: Robin B  
Installer: ROBIN B | E343

Type	Quantity	Product Description	Color / Item Number
		Labor Description	Area
undefined			
LVT <b>Materials</b>	324 SF	Homestead LVT 6x36	Rustic Walnut
Line #0 <b>Labor</b>	360 SF	Install LVT Standard	\$0.50 \$180.00
<b>Edit</b>	130	finish next week	\$180.00

## Add-on items labor or material

- Click the Add-On button and then the Plus sign
- Fill in the Quan, UOM, and cost

Not Submitted

Cancel
Save
Add-Ons
Submit

Add-ons +

Delete	Quantity	Unit	Description	Unit Cost	Total
🗑️	2	EA	Adhesive	36.00	\$72.00

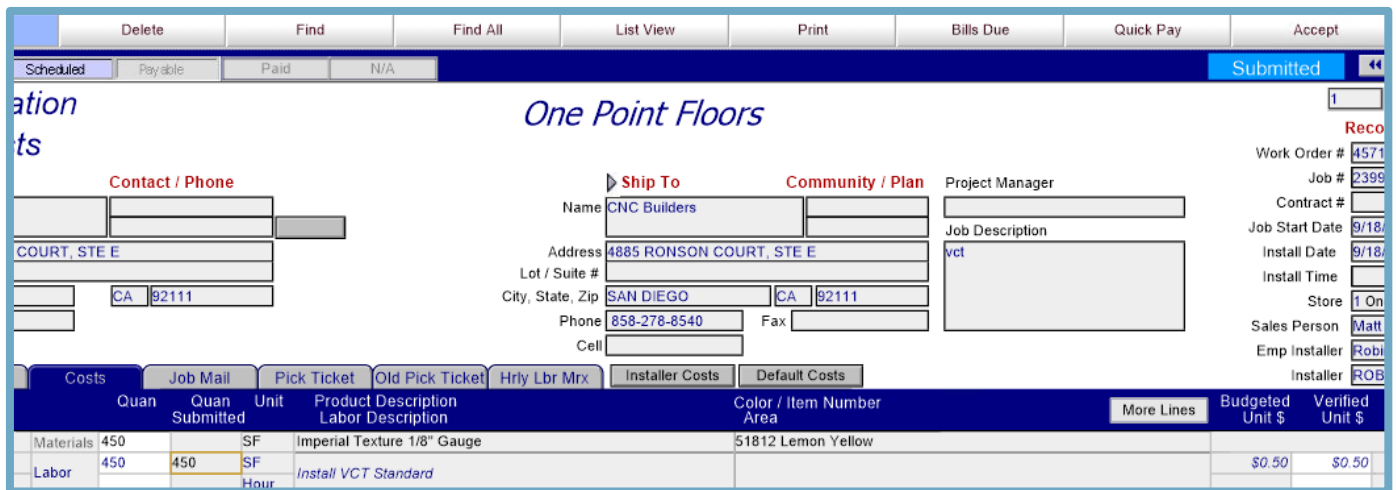
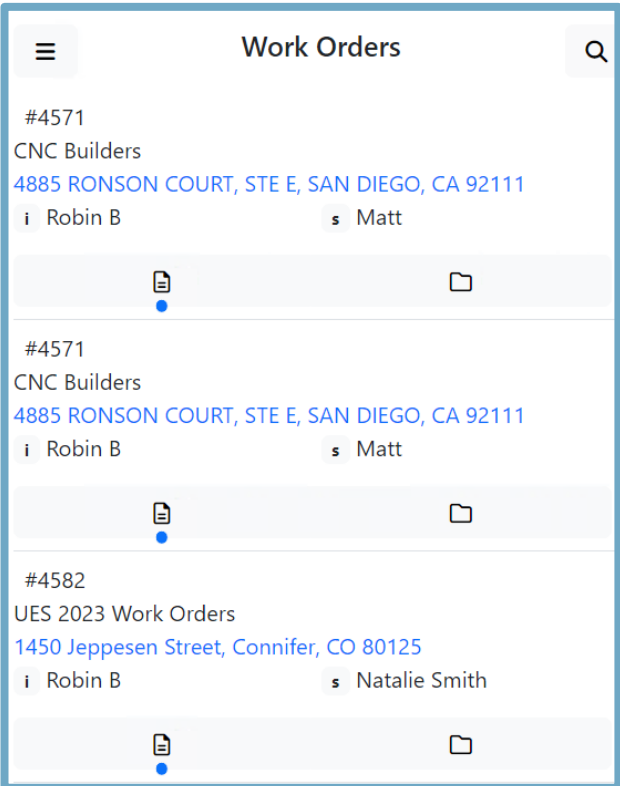
- Then Save and Submit

# Processing the Labor



Submitted labor on List in App has a blue dot under the work order

Submitted Labor in Core will have a blue Submitted word on the Cost tab



# Work Order Changes

Accepted Scheduled Payable Paid % Comp Submitted 8 of 9 472

## Installation Costs One Point Floors

**Sold To** Capitol Investments **Contact / Phone** **Ship To** UES 2023 Work Orders **Community / Plan** **Project Manager** Matt

1450 Jeppesen Street **Address** 1450 Jeppesen Street **Job Description** Install LVT

Connifer CO 80125 **City, State, Zip** Connifer CO 80125 **Phone** **Fax** **Cell**

**Record Info**  
 Work Order # 4582  
 Job # 3024  
 Contract #  
 Job Start Date 9/21/2023  
 Install Date 9/19/2023  
 Install Time  
 Store 1 One Point Floors  
 Sales Person Natalie Smith  
 Emp Installer Robin B  
 Installer ROBIN B | E343

Itemized	Costs	Job Mail	Pick Ticket	Old Pick Ticket	Hrly Lbr Mrx	Installer Costs	Default Costs	Color / Item Number Area	Budgeted Unit \$	Verified Unit \$
Type Record #	Materials	Quan	Quan Submitted	Unit	Product Description Labor Description					
LVT 3024	Materials	130	130	SF	Homestead LVT 6x36			Rustic Walnut		
Line# 1	Labor			SF	Install LVT Standard				\$0.50	\$0.50
Submitted Notes: finish next week										
Notes Installer										
Undefined 3024	Materials	2		EA	Adhesive					\$36.00
Line# 2	Labor			Hour						
Submitted Notes:										
Notes Installer										
Installer Add-ons										
Quantity	Unit	Description	Unit Cost	Total	Action	Total Hours	Cost Per Hour			
2	EA	Adhesive	\$36.00	\$72.00	Approved					

- The Submitted items will automatically be seen on the Work order in the Core.
- At that time the additional supplies or labor can be approved
- And any Quantity can be adjusted to be split to a new work order if needs be.



# Employees










Time Tracking

# Tracking Hours

If access is granted

They can click on the clock on the line

Each time they click it, it turns on and off and on and can be used for lunches etc

#4595	City View Church <a href="#">8404 Phyllis Place, SAN DIEGO, CA 92123</a> i Robin B                      s Davey Jones			
#4595	City View Church <a href="#">8404 Phyllis Place, SAN DIEGO, CA 92123</a> i Robin B                      s Davey Jones			
#4596	City View Church <a href="#">8404 Phyllis Place, SAN DIEGO, CA 92123</a> i Robin B                      s Davey Jones			

# Tracking Hours



From Navigator Go to Payroll

- Post Labor
- Click new



It should automatically load(if not click)

Installer	WO Number	Date	Start	Finish	Hours
Zoe Tracking Hours	4583	9/19/2023	8:33 AM	8:33 AM	0
Robin B	4581	9/20/2023	7:37 AM	7:37 AM	0
Robin B	4592	9/20/2023	7:37 AM	7:37 AM	0
Robin B	4581	9/20/2023	7:37 AM	7:38 AM	.02
Robin B	4595	9/20/2023	7:38 AM	7:38 AM	0
Robin B	4595	9/20/2023	7:38 AM	7:38 AM	0
Robin B	4596	9/20/2023	7:38 AM	7:44 AM	.1
Robin B	4596	9/20/2023	7:44 AM	7:45 AM	.02
Robin B	4592	9/20/2023	7:45 AM	7:51 AM	.1

Submit Times

# Tracking Hours

Once the Week has been loaded

- Proceed to add the Description (generally something like pay Weekending 01/01/02222)
- And Adjust or edit lines as needed
- Then post the Hours
- This will send all the installers hours to the Work Order that was assigned
- At this time the Work Order can be accepted to match the HLM logged hours

Hourly Labor Detail												
		Return	Post	Sort	Export	Import	Print	Mobile Time Grid				
Posting ID	Payroll Posting Date	Posted By	Description									
272	9/20/2023	Robin B	Week Ending 09/22/2023									
Post Date	Work Date	Job #	Work Order #	Project #	Ship To Name	Installer Position	Regular Rate	Shift Rate	Overtime Rate	Doubletime Rate	Total Hours	Extended Sick
9/20/2023	9/19/2023	2850	4593	2850	Narutonatsu Uzumaki	Dakota Smith Foreman	0.00				0.00	\$0.00
							\$20.00	\$22.00	\$25.00	\$40.00		
9/20/2023	9/20/2023	2946	4592	2946	Jim Tanner	Robin B Journeyan Level 8	0.00				0.00	\$0.00
							\$27.00	\$30.00	\$32.00	\$54.00		
9/20/2023	9/20/2023	3024	4581	3024	UES 2023 Work Orders Carpet install	Robin B Journeyan Level 8	0.02				0.02	\$0.54
							\$27.00	\$30.00	\$32.00	\$54.00		
9/20/2023	9/20/2023	2316	4596	2316	City View Church	Robin B Journeyan Level 8	0.10				0.10	\$2.70
							\$27.00	\$30.00	\$32.00	\$54.00		
9/20/2023	9/20/2023	2316	4596	2316	City View Church	Robin B Journeyan Level 8	0.02				0.02	\$0.54
							\$27.00	\$30.00	\$32.00	\$54.00		
9/20/2023	9/20/2023	2946	4592	2946	Jim Tanner	Robin B Journeyan Level 8	0.10				0.10	\$2.70
							\$27.00	\$30.00	\$32.00	\$54.00		
9/20/2023	9/19/2023	2850	4593	2850	Narutonatsu Uzumaki	Dakota Smith Foreman	2.00				2.00	\$40.00
							\$20.00	\$22.00	\$25.00	\$40.00		





# Personnel Access

Granting access to PS Mobile

# Personnel

Once the person is set up

Click on the Cloud Access Tab

- Marking the Active PS Mobile User is mandatory
- Select the items being granted to the installer, QA, PM etc

? Web Help

**Personnel Setup**

Name: Robin B

Title: #1 Sales

Default Store: 1 One Point Floors

General Information
Access Level
Profile / Commission
Logo
Assistants

General Access Information

F [redacted]

Access Level: 10 Owner

Update

General
Reports
Cloud Access
Zoom Levels

Active PS Mobile User

Cloud Only Access

Section	No	Yes	Yes With Costs	Yes But Theirs Only	Yes But Theirs Only With Costs	Can Edit Costs	Can Edit Quantity	Can View COD
Customer	<input type="radio"/>	<input checked="" type="radio"/>						
Work Order	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Vendors	<input type="radio"/>	<input checked="" type="radio"/>						
Time Tracking	<input type="radio"/>	<input type="radio"/>						
Inventory	<input type="radio"/>	<input checked="" type="radio"/>						

**Installer Workorder future day visibility:**

See  days into the future.  
Set 1 to validate time field below. Set 0 to only allow tomorrow visibility once tomorrow has arrived.

See tomorrow at this time:

Return

# Next Up: Afternoon Refreshments

2:30 – 2:50 pm

Followed by: Breakout #7  
2:50 – 3:35 pm

- Warehouse Management Best Practices – Griffin Ballroom
- Flooring Financial – Belle Meade Room
- FloorRight in 3D – Arlington Room