



## Operate Trial Sequence

You've got Operate on your phone and you want to try it, see how it works for Account Managers. Here's a suggested sequence of things to try so you can start to get a good feel for what it does.

Everything with Operate starts when you capture Information during property visits on a mobile device. Making this far faster and easier than via other methods is a major focus of the product. This is mostly in the form of describing **Items** which can be **Issues**, **Enhancements** or **Highlights**.

**This sequence assumes you just logged in, and you are at a Property you want to capture information about.**

### 1. Select or Create the Property

You start in the Property view. You can switch to the Map to see if you're standing in an existing Property. If you are, click on the Property and then the right arrow for the Property where you are so you can start adding Items (Issues, Enhancements or Highlights).



If the property you want to try out Operate on is not in the system yet, add it.

1. To create a new *Property* click the +.
2. Search for it by name or enter the address.
3. Save the *Property* and it will now be added to your *Property Map* and *List* and you can select it to update and add Items to.

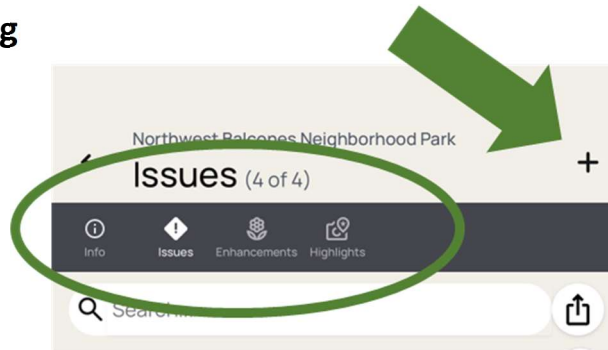
### 2. Go find something that you would consider an Issue

Look around for anything that if you were doing a post-service site walk, you would identify as an Issue requiring correction.

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### 3. Capture the Issue in Operate Using Quick Mode

You start creating an Item by first selecting *Issue*, *Enhancement* or *Highlight* in the bar at the top. Then click the +.

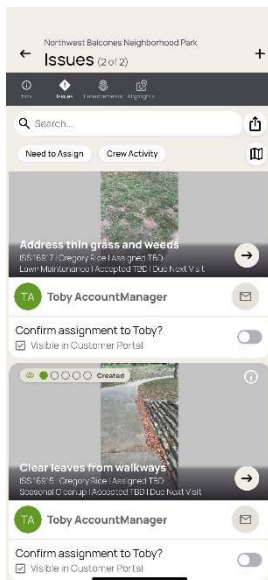
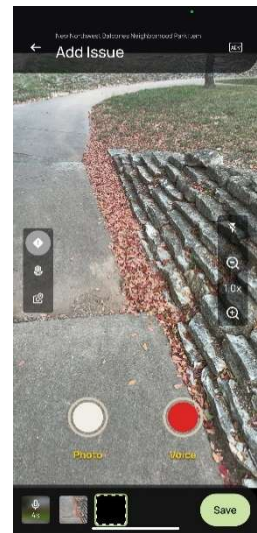


The default will be Quick Mode. Whatever Mode you select will remain in effect when you create new Items until you change it.

**Quick Mode** is ideal if you want to walk around and quickly capture Items, then go through them back in your vehicle or office to review and edit them.

This will open the Add Issue pane. All you need to do is **take a picture of the Issue, then make a voice recording describing the Issue** and what needs to be done about it.

When you click Save, the Issue is created and a new Issue opens so you can continue the site walk. For the sake of this exercise, use the back arrow and cancel out, then go take a look at the Issue that was created.



The Issue will now appear under Issues for the Property. By clicking the Right Arrow you can see the details. You will find:

- A location pinned on the property map
- A name
- A description entered into the description field
- A Service Line selected
- An assignee selected (not yet assigned though)

All of this is created for you automatically based on Operate's analysis of the picture and your voice recording. All of it can be edited by clicking the pencil for the section where the information you want to edit is.

#### 4. Now try Advanced Mode

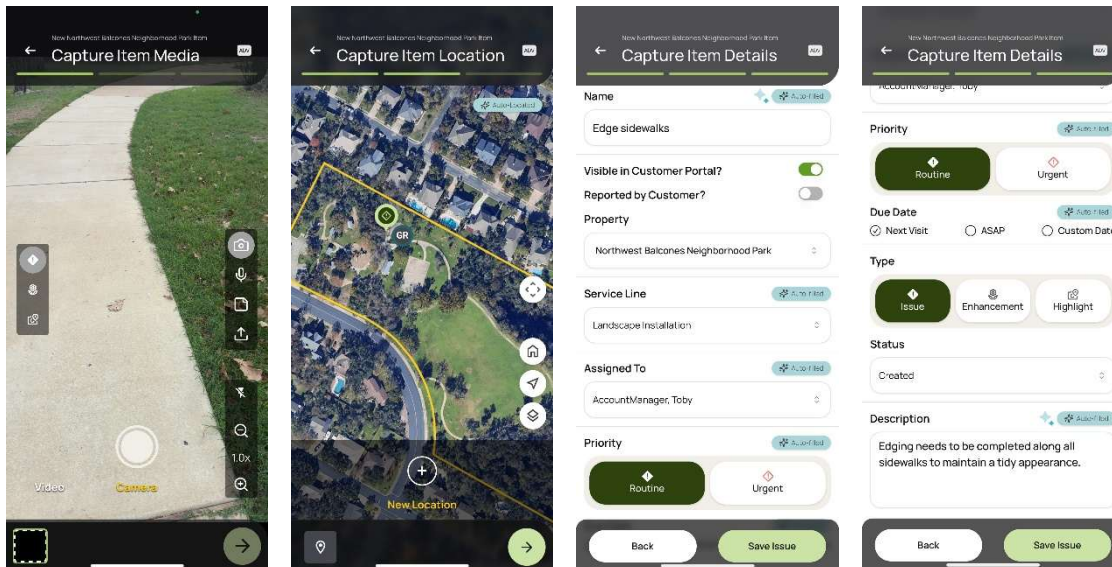
Go find another Issue. Start the same way by clicking the +, but this time toggle to advanced mode when the Issue opens.



**Advanced Mode** is still quick and easy, but with more steps to allow you to review and manually make changes as you go. Advanced Mode is ideal if you want to spend a little more time to capture everything completely and correctly at the site of the Issue, Enhancement or Highlight from the start.

The first pane lets you start with a picture or pictures, a video, a voice recording or attach a file. The next pane displays and lets you change the location on a map, the third step lets you see all the details and edit them. Like in Quick Mode - Operate auto-completes everything so you just make edits where needed.

- In the first pane take a picture, then select the microphone to make a voice recording as with the first Issue. Note there are additional options like making a video or attaching a document.
- Use the Right Arrow to navigating the panes where you can see and adjust the locations, and immediately review and edit the name, description and other settings.
- When done select Save Issue.



**5. Now you have a Property with two Issues. Other things you can explore and try.**

Add Enhancements and Highlights. The process is the same (select Enhancement or Highlight at the top of the Property page and use the +).

At the property level look at your Issues as a List or in the Map.

If you have someone in your company who is set up as a Crew Lead, make them the assignee and use the toggle to assign an Issue to them. They will get a notification and be prompted to accept the assignment.

Use the Web version of Operate on your computer to access the system via browser. Same login credentials as the app. Here you can see a Property Map of your properties and go into a Property to see a Map and a List of Items like Issues you have created. Note this view is similar to what you can provide to your customers, the difference is that they only see Items you have selected to be shown to them, and they do not have the ability to edit.