

SMARTWARE STAGING - OWNER ACCOUNTS

The SmartWare Staging website can be used by owners to access SW Mobile on an iPad without affecting your live data or being charged for the app.

The SmartWare Staging website is a copy of the SmartWare Production website, which is the main website that all Zee's use on a daily basis.

The SmartWare Staging website is refreshed every Tuesday morning with a new copy of the Production website. That means that any data that is setup in Staging will be overwritten every Tuesday.

ACCESSING SW STAGING SITE

SW Staging URL: <https://mra-staging.servantia.com/#/login>

1. Click on the link above to open SW Staging.
2. Login using your regular login credentials.
3. SW will load with the data that was in your regular SW account from on most recent Tuesday (Staging is refreshed with Production data every Tuesday)
4. Create a Technician to use for testing/practice.
 - a. You could also create a Test Technician in your production account, make the tech inactive, then re-activate that employee on Staging after the copy from Prod to Staging.

CREATING A TECHNICIAN

1. Click on + to add new employee.

Employees List					
	Last Name	First Name	Roles	Admin User	Active
	B	Rebecca	Technician, Owner	<input type="checkbox"/>	<input checked="" type="checkbox"/>
	B	Mike	Technician	<input type="checkbox"/>	<input checked="" type="checkbox"/>
	Brown	Bobby	Office	<input type="checkbox"/>	<input checked="" type="checkbox"/>

2. Enter Employee Name
3. Select Default Location
4. Select Job Skills
5. Click on Save

Employee 5

<p>First Name: <input type="text" value="Super"/></p> <p>Middle I 2 <input type="text"/></p> <p>Last Name: <input type="text" value="Tech"/></p> <p>Spouse Name: <input type="text"/></p> <p>Children: <input type="text"/></p> <p>Education Level: <input type="text"/></p>	<p>Employee Number: <input type="text"/></p> <p>Payroll Number: <input type="text"/></p> <p>Default Site: <input type="text" value="All"/></p> <p>Default Location: 3 <input type="text" value="T5 - Andy"/></p> <p>Home Page: <input type="text"/></p> <p>Equipment: <input type="text"/></p> <p>Job Skills: 4 <input type="text" value="Sealed System x"/> <input type="text" value="Standard x"/> <input type="text" value="Full Line x"/></p> <p>Pay Type: <input type="text" value="Hourly Non-exempt from overtime"/></p>
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6. Click on the '+' in the address panel.

Employee Search

Employee ▼

Payroll ID	Employee	Number	Status
	Super Tech	24	Active

Addresses ▼

+ 6 Address type	Name	Address	City	State/Province	Postal Code	Active

Drivers Info ▼

Drivers License #	State	Expiration Date

Employee Dates ▼

Hire Date	Termination Date	Birth Date	Work Eligibility Date	Employment Agreement Date	Criminal History Date	Background Check Date	Wedding Anniversary Date

Tasks

Start: End: Search

+	Type	Category	Subject	Priority	Status	On Calendar	Tied To	Date

Calendar - Inactive Print Save All

Contact ▼

+ Contact Type	Contact Info	Description	Active

Employee Time Clock ▼

Employee Time Off ▼

Schedule Templates ▼

Pay Rates Home Close Eye

Position	Pay Percentage	Hourly Rate	Default

Access Control ▼

Username	Roles	Devices
No Username		

Attachments ▼

+	Name	Type	Active

Search No items to display

7. Select Address Type of Primary
8. Enter Address Name (Work, Home, etc.)
9. Enter Address
10. Validate Address
11. Save

Employee Search

Employee

Payroll ID	Employee	Number	Status
	Super Tech	24	Active

Addresses

Address Type: Primary Postal Code:

Address Name: Work City:

Address 1: 1010 N. University Par State/Prov.: Texas

Address 2:

Active:

Google Mapping Address:

Mapping Accuracy: Validate Address

Lat: Long:

Calendar - Inactive Print Save All

Contact

+ Contact Type Contact Info Description Active

Employee Time Clock

Employee Time Off

Schedule Templates

Pay Rates

Position	Pay Percentage	Hourly Rate	Default

Access Control

Username	Roles	Devices
No Username		

Attachments

+ Name Type Active

x No items to display

12. Click on the blue arrow in the Access Control panel.

Employee Search

Employee

Payroll ID	Employee	Number	Status
	Super Tech	24	Active

Addresses

+	Address Type	Name	Address	City	State/Province	Postal Code	Active
✎	Primary	Work	1010 N. University Parks Dr.	Waco	Texas	76707	<input checked="" type="checkbox"/>

Drivers Info

Drivers License #	State	Expiration Date

Employee Dates

Hire Date	Termination Date	Birth Date	Work Eligibility Date	Employment Agreement Date	Criminal History Date	Background Check Date	Wedding Anniversary Date

Tasks

Start: 📅 End: 📅 Search 🔍

+	Type	Category	Subject	Priority	Status	On Calendar	Tied To	Date
+								

Calendar - Inactive Print Save All

Contact

+ Contact Type Contact Info Description Active

Employee Time Clock

Employee Time Off

Schedule Templates

Pay Rates

Position	Pay Percentage	Hourly Rate	Default

Access Control

Username	Roles	Devices
No Username		

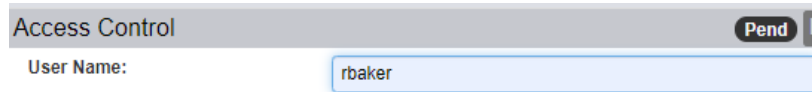
Attachments

+ Name Type Active

x No items to display

13. Enter a username.

- a. The username and password may show your username and password if you have auto-fill turned on in Chrome. If it does, just click on the box. The outline will show in blue and you can backspace to remove your username and enter the new one.



Access Control Pend

User Name:

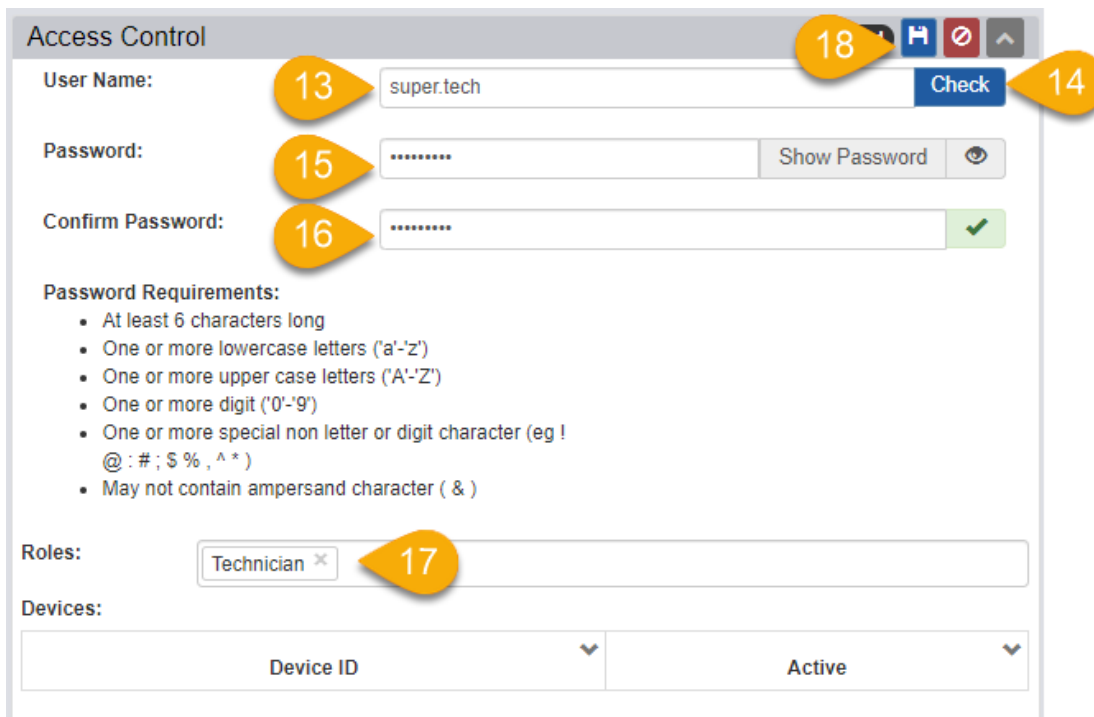
14. Click the “Check” box to confirm that the username is not already in use.

15. Enter a password, following the password requirement.

16. Confirm the password.

17. Click in the “Roles” box and select “Technician” from the list.

18. Click on “Save”.



Access Control 18

User Name: 13 Check 14

Password: Show Password 15

Confirm Password: 16

Password Requirements:

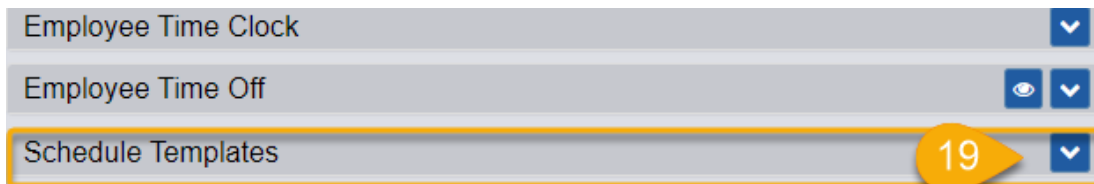
- At least 6 characters long
- One or more lowercase letters ('a'-'z')
- One or more upper case letters ('A'-'Z')
- One or more digit ('0'-'9')
- One or more special non letter or digit character (eg ! @ : # ; \$ % , ^ *)
- May not contain ampersand character (&)

Roles: 17

Devices:

Device ID	Active

19. Click on the blue arrow on the Schedule Templates panel



Employee Time Clock ▼

Employee Time Off ▼

Schedule Templates 19 ▼

20. Click on the '+' to add a new template.

Schedule Templates

+ 20

Days Zone AM Hours PM Hours Rank Job Skills Active Start Time End Time (Routing)

Search No items to display

21. Select the technician that was just created.

22. Select a zone.

23. Add AM and PM hours of availability.

24. Save.

Schedule Templates Save 24

Tech/Route: Tech, Super 21

Zone: 1 - Waco 22

Start Time: 08:00 AM

End Time (Routing): 06:00 PM

Rank: 1

AM Hours: 4

PM Hours: 4 23

Active:

Recalculate Next 35 Days

Note: Recalculate will clear out all schedule records for the above employee only and set new values based on the template, handling multiple zones with different workdays.

ID:0 Created: Updated:

25. Click on "Recalculate Next 35 Days" button.

Schedule Templates Save Close

Tech/Route: Tech, Super

Zone: 1 - Waco

Start Time: 08:00 AM

End Time (Routing): 06:00 PM

Rank: 1

AM Hours: 4

PM Hours: 4

Active:

Monday:

Tuesday:

Wednesday:

Thursday:

Friday:

Saturday AM:

Saturday PM:

Sunday:

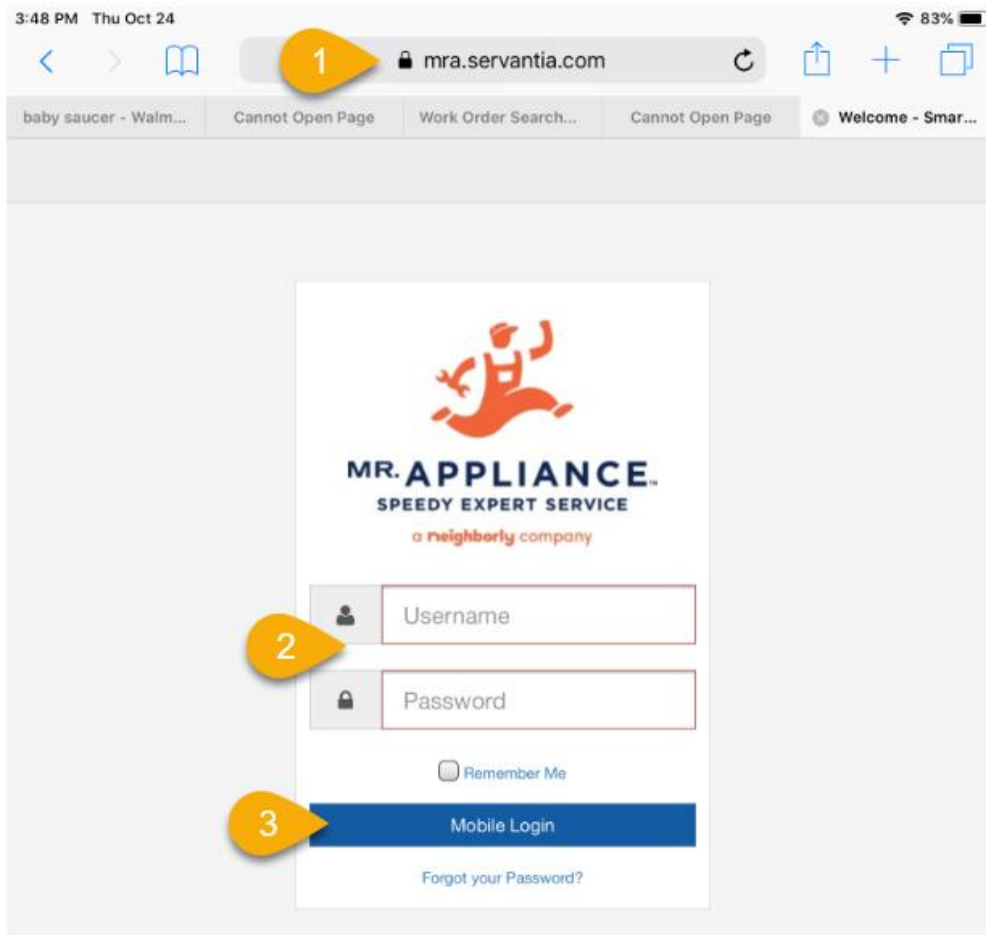
Recalculate Next 35 Days 25

Note: Recalculate will clear out all schedule records for the above employee only and set new values based on the template, handling multiple zones with different workdays.

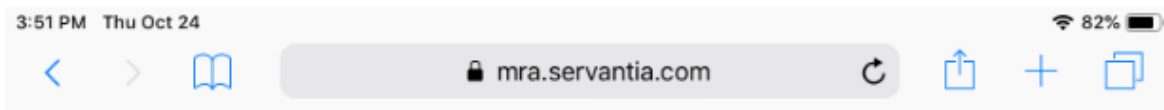
Your technician will now show availability in the Simple and Routing Schedulers.

DOWNLOAD AND INSTALL THE STAGING APP

1. On the iPad, open this link: <https://mra-staging.servantia.com/ipad>
2. Enter Tech's SW Username and Password.
3. Click on the Mobile Login button.



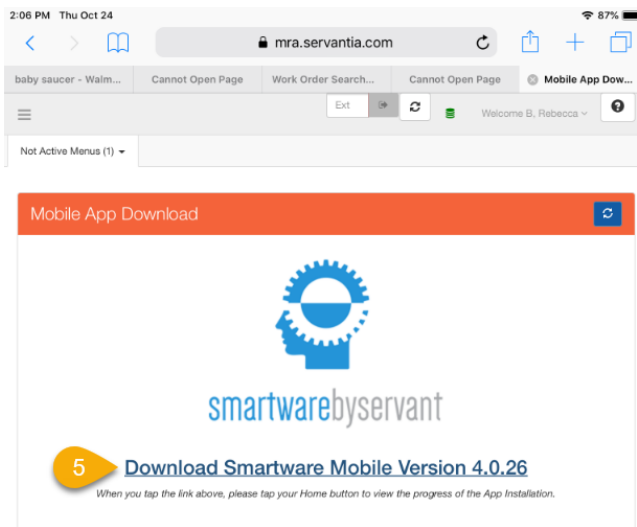
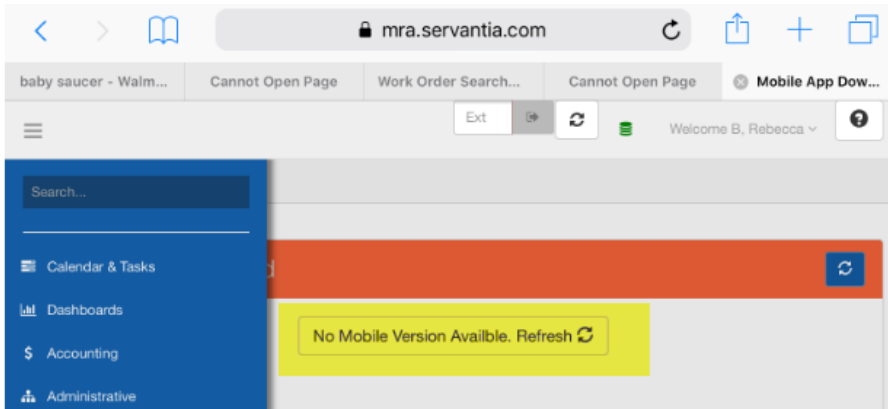
4. Click on the Download Mobile App link.



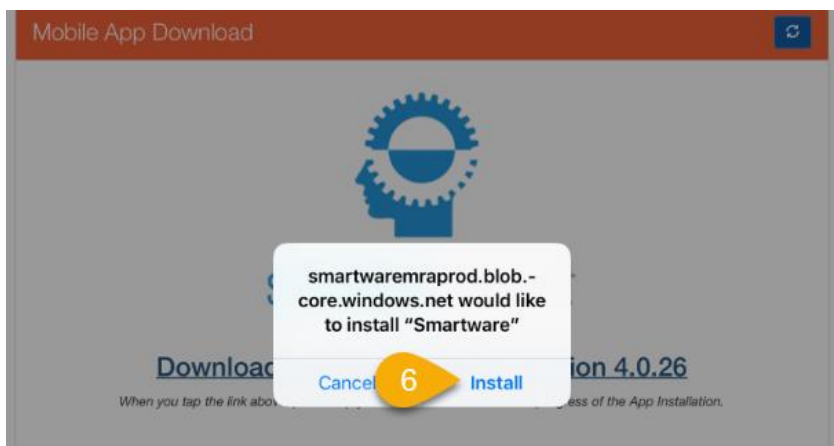
[Download Mobile App](#)
[Big Board](#)

4

5. If the screen looks like this, click on the refresh button to load the link. Click on the link and install the latest version of the app.



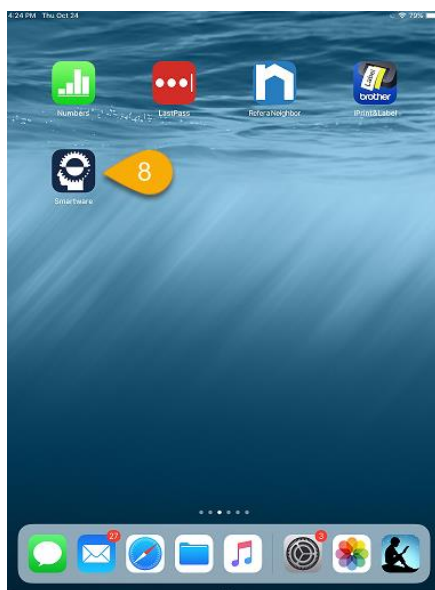
6. Tap "Install" on the pop-up message.



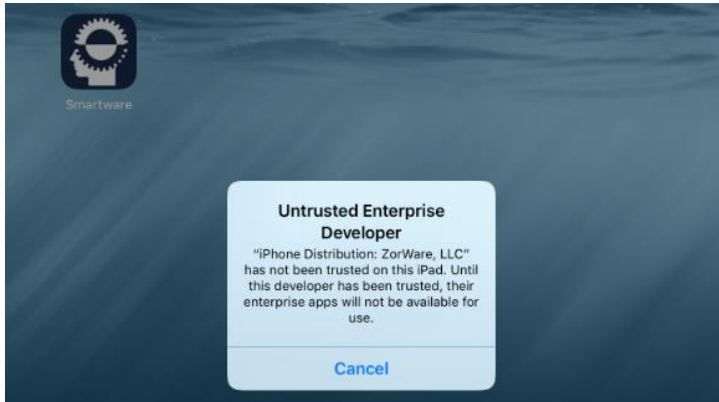
7. Tap on the home button on the iPad to see the app downloading.



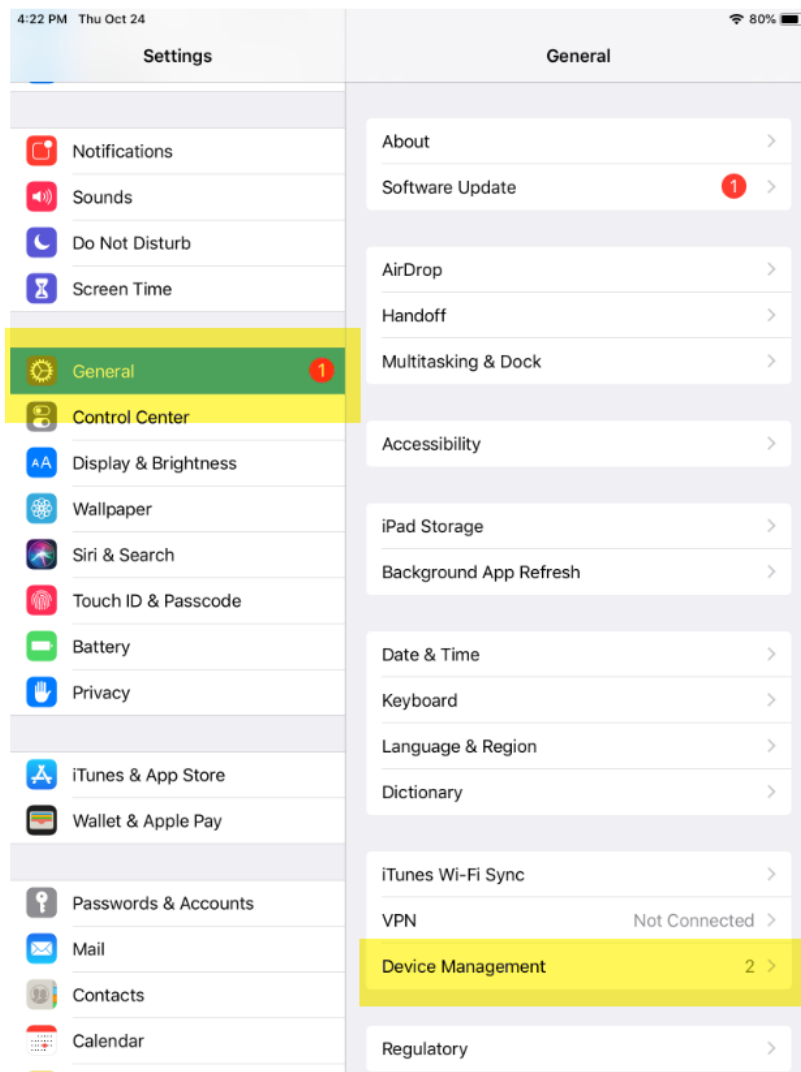
8. Click on the icon to begin registering the app.



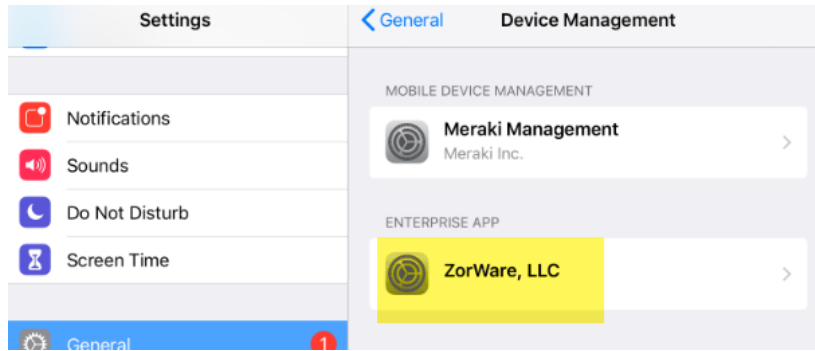
9. You may get a pop-up message that says “Untrusted Enterprise Developer.” If you do NOT, proceed to step 10. If you do, complete the steps below.



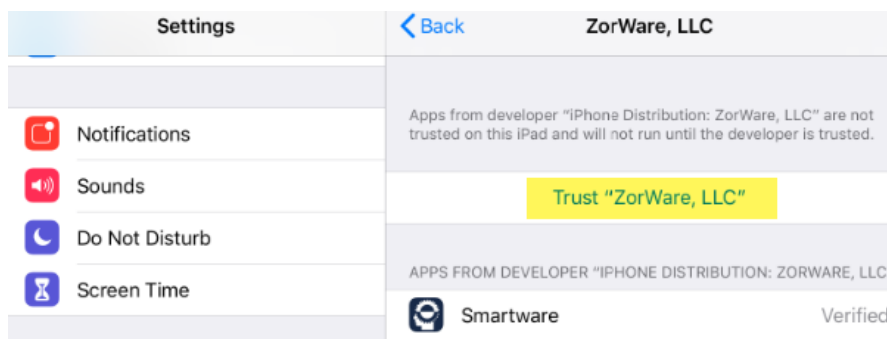
- a. Go to iPad Settings. Open General, then Device Management.



b. Select "ZorWare, LLC" under Device Management.



c. Tap Trust 'ZorWare, LLC', then return to the SW Mobile icon and tap it.



10. Enter the same username and password that was used in Step 2 to register the app. Tap the "Register" button.



11. Enter a short local password to use for opening the app during daily use. Click on “Next”.



The screenshot shows the Servantia Smartware logo at the top. Below it is a grey box with the heading "Choose a Local Password" and the instruction "Enter a new local password for this device. It is different than the one given to you by the office." There are two input fields: "Local Password" and "Confirm Password". A yellow callout bubble with the number "11" points to the "Local Password" field. At the bottom of the grey box are two buttons: "Cancel" and "Next".

12. The app will begin registering and downloading the office data.



13. The app is now registered to the username. Enter the short local password to open the app.



The screenshot shows the Servantia Smartware logo at the top. Below it is a dark blue box with two input fields: "Registered To" with the text "rebeccatr" and "Password". Below the input fields is an orange button labeled "Sign In".

Once the app is downloaded, you will be able to create jobs on the SW Staging site and send them to the iPad. Emailing/texting does not work on staging, so you will not receive any invoices or confirmation emails and texts.