CAFM WAY USER GUIDE

Technician App

The phone app field technicians use to receive jobs, record the work, parts and photos, and close jobs on site.

`technician.cafm-way.com` · Last updated: 26 Sep 2026

Contents

Getting started

This part explains what the Technician app is for, how to open it and how to sign in. It is written for maintenance technicians, both your company's own staff and technicians who work for a contractor.

What the app is for

Who: technicians (role Technician) and contractor technicians

Where: the CAFM Way Technician app on your phone, or `technician.cafm-way.com` in the phone's browser

The office raises work orders (jobs) in the CAFM Way web app and assigns them to you. The Technician app is where you receive those jobs and do everything that happens on site:

1. See your jobs, with the most urgent one first.
2. Accept a job, or decline it with a reason.
3. Start work, which starts the job clock and the SLA response.
4. Log what you did, take before and after photos, and record the parts you used or need.
5. Close the job with notes, a root cause and the customer's signature, or send it to your supervisor to check.

Everything you record goes straight to the office. The supervisor sees the job status change on the web dashboard as you work.

The app has four tabs at the bottom of the screen:

Tab	Use it to
Tasks	See and search your jobs (the home screen)
Schedule	See your jobs day by day for the week
Chat	Message colleagues, or talk about a specific job
Me	Your profile, van stock, safety, language and settings

Install and open the app

Who: any technician with a CAFM Way account

Where: your phone

1. Install the CAFM Way Technician app from the link your company gives you. If you have no install link, open `technician.cafm-way.com` in your phone's browser; the browser version works the same way.
2. Open the app. The first time, a short welcome video plays.
3. Tap **Skip** to close it now, or **Don't show again** so it does not play at the next start.

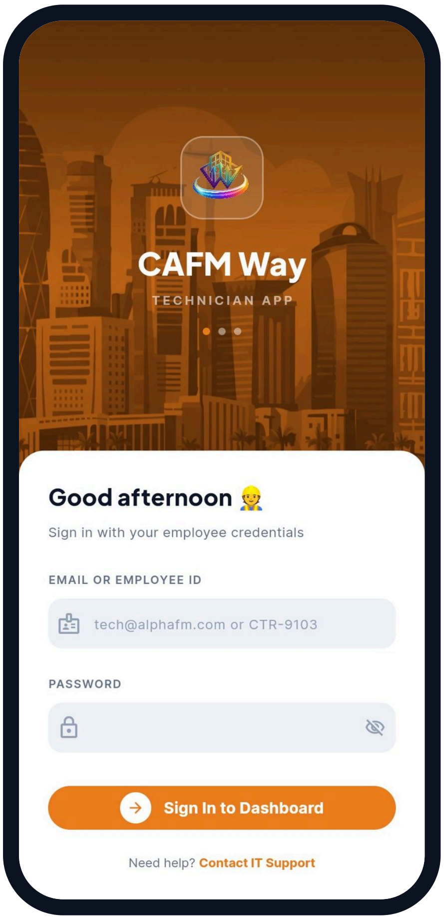


Figure 1 The welcome video, with Don't show again and Skip at the top

TIP

You can turn the welcome video back on later under **Me → Language → Play the welcome video**.

NOTE

Your company administrator creates your account in the web app. You cannot register from the Technician app.

Sign in

Who: any technician

Where: the sign-in screen, which the app shows whenever you are signed out

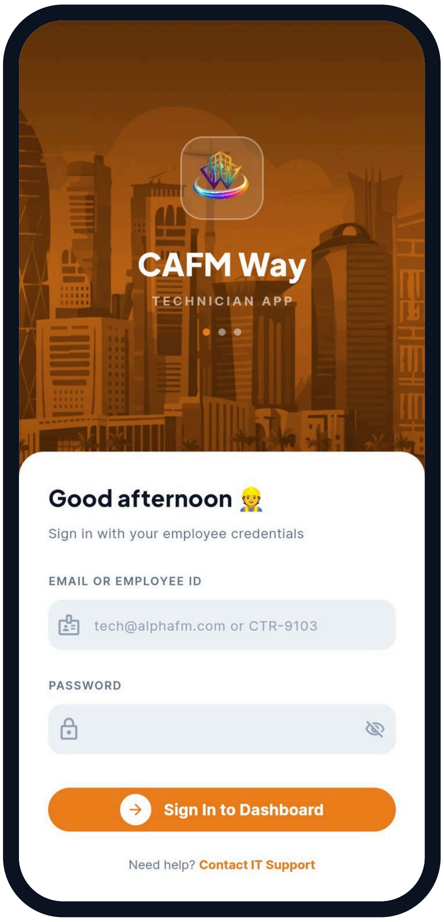


Figure 2 The sign-in screen

1. In **EMAIL OR EMPLOYEE ID**, type your work email, for example `khalid@oasis-fm.test`. A contractor technician can type the contractor user code instead (for example `CTR-9129`).
2. In **PASSWORD**, type your password. Tap the eye icon to show or hide it.
3. Tap **Sign In to Dashboard**. The button reads **Signing in...** while it works.

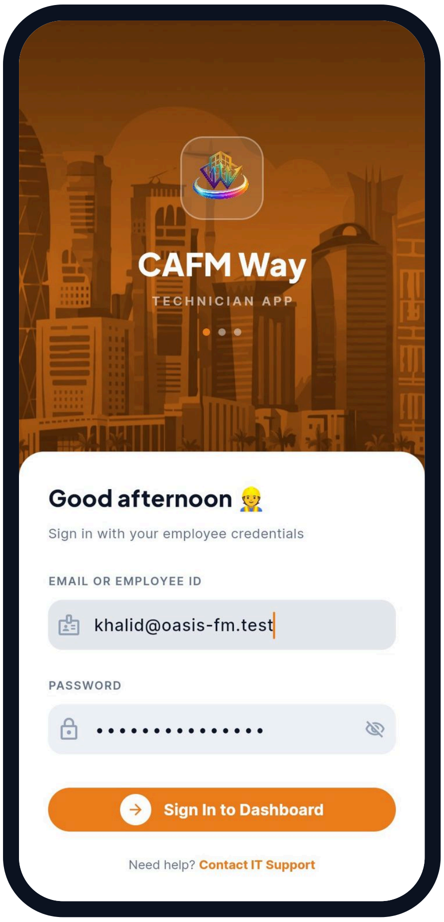


Figure 3 Email and password entered, ready to sign in

The app opens on **Tasks**. It remembers you, so next time it opens straight on your jobs without asking for the password again.

> **BUSINESS RULE**
>
> The field also accepts an employee ID such as `EMP-0003`, but only when that ID is unique across every company on CAFM Way. Employee IDs are numbered per company and usually are not unique, so sign in with your email.

Sign-in problems

Who: any technician

Where: the sign-in screen

The app shows a message at the bottom of the screen when it cannot sign you in.

Message	What it means	What to do
Enter your email or employee ID, and your password	One of the two fields is empty.	Fill in both fields.
Invalid email or password	The email (or ID) and password do not match an account. You also see this when you sign in with an employee ID that is used in more than one company.	Check the spelling and try again with your email.
Too many login attempts...	Too many failed tries in a short time.	Wait a few minutes, then try again.
Cannot reach server...	The phone has no connection to CAFM Way.	Check mobile data or Wi-Fi and try again.
A message that your company is suspended or your location is not allowed	Your company's account or its security settings block the sign-in.	Contact your supervisor or IT support.

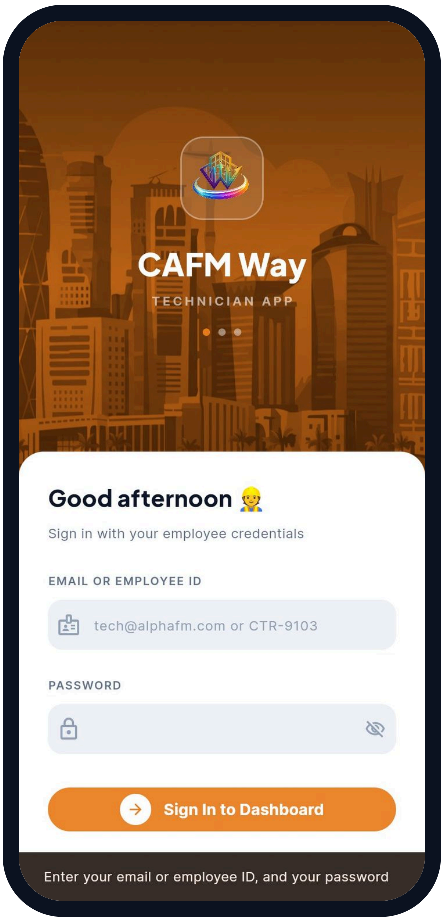


Figure 4 The message shown when a field is empty

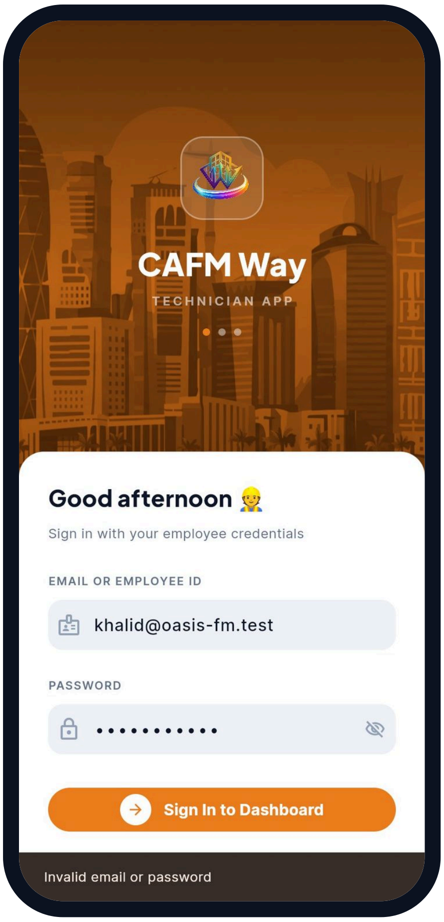
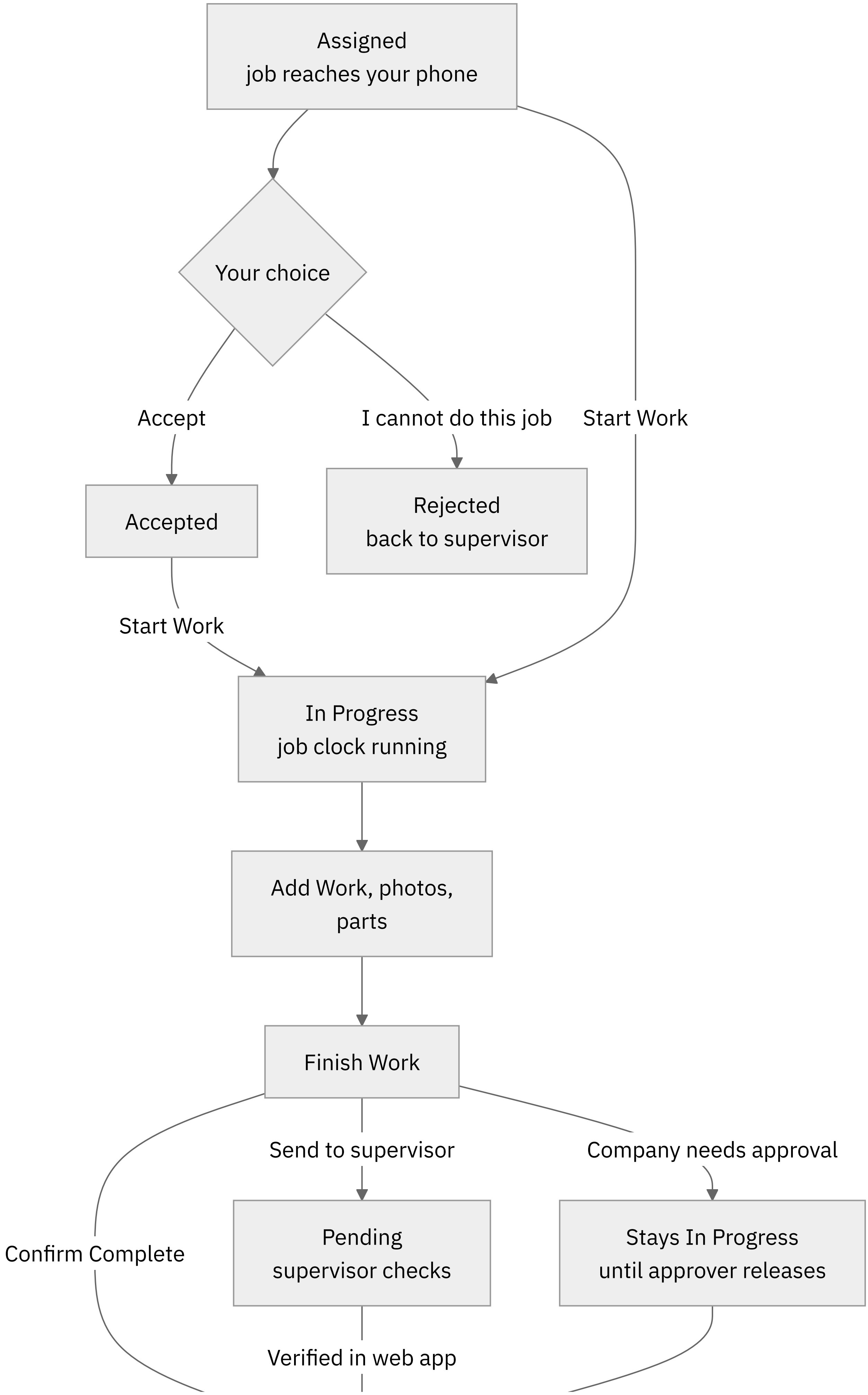


Figure 5 The message shown for a wrong password

> **NOTE**
>
> The **Need help? Contact IT Support** line at the bottom of the screen is a reminder, not a link. If you forgot your password, ask your company administrator to reset it in the web app.

Job lifecycle at a glance

This is the path a job follows from the moment it reaches your phone. The words in the boxes are the status chips you see in the app.


Assigned
job reaches your phone
Your choice
Accept
I cannot do this job
Start Work
Accepted
Rejected
back to supervisor
Start Work
In Progress
job clock running
Add Work, photos, parts
Finish Work
Send to supervisor
Company needs approval
Confirm Complete
Pending
supervisor checks
Stays In Progress
until approver releases
Verified in web app

Status chip	Meaning
Assigned	The job is yours but you have not accepted or started it.
Accepted	You have acknowledged the job.
In Progress	You pressed **Start Work**. The job clock is running.
Pending	You sent the job to your supervisor for verification.
Completed	The job is closed.
Rejected	You declined the job, or the office cancelled it.

> **NOTE**
> There is no travel, arrival, pause or on-hold step in the app. You go from **Accepted** straight to **Start Work**.

Your jobs

This part covers the home screen, finding a job, accepting or declining it, reading its details and planning your week.

Home screen (Tasks)

Who: any technician

Where: bottom tab **Tasks**

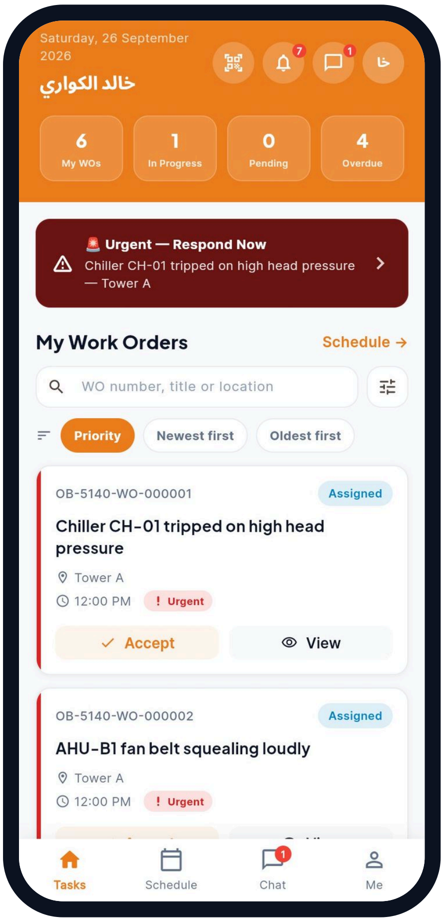


Figure 6 The Tasks home screen with the urgent banner, the four counters and the job cards

The top of the screen shows today's date, your name and four icons: the QR scanner, the notification bell, chat and your initials (which open **Me**). A red dot with a number shows unread notifications or messages.

The four counters summarise your jobs:

Counter	Counts
My WOs	All jobs in your list
In Progress	Jobs you have started
Pending	Jobs waiting for your supervisor to verify
Overdue	Open jobs whose scheduled time has passed

When you have an open urgent job, a dark red banner **Urgent — Respond Now** shows its title and location. Tap it to open that job.

Under **My Work Orders**, each card shows the work order number, the title, the location, the scheduled time (with the date when it is not today), the priority and the status. A job that is still **Assigned** has two buttons, **Accept** and **View**. Completed jobs are greyed out.

- Pull the list down to refresh it. New assignments and status changes also appear on their own while the app is open.
- The list loads 25 jobs at a time. Scroll down, or tap **Load more**, to see older ones.

Find a job: search, sort and filter

Who: any technician

Where: Tasks

1. Type a work order number, a word from the title or a location in the search box **WO number, title or location**.
2. Tap a sort chip: **Priority** (the default), **Newest first** or **Oldest first**.
3. Tap the filter icon at the right of the search box. The sheet **Filter work orders** opens.

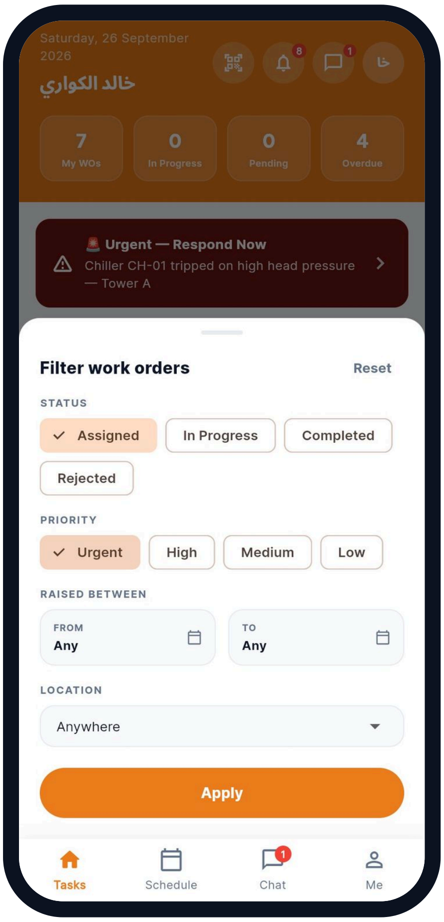


Figure 7 The filter sheet with Assigned and Urgent selected

1. Choose any of:
   - **STATUS**: **Assigned**, **In Progress**, **Completed**, **Rejected**.
   - **PRIORITY**: **Urgent**, **High**, **Medium**, **Low**.
   - **RAISED BETWEEN**: a **FROM** and **TO** date.
   - **LOCATION**: one site, or **Anywhere**.

2 Tap **Apply**. The list and the counters now show only the matching jobs.

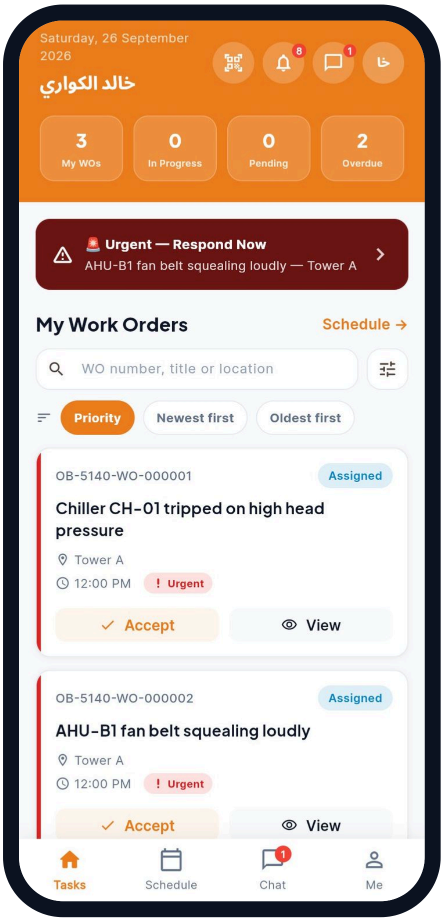


Figure 8 The list filtered to urgent jobs that are still assigned

To go back to all jobs, open the sheet again, tap **Reset**, then **Apply**. When you searched or filtered by place or date, a line **Showing jobs...** appears under the search box with **Clear all**.

Accept a job

Who: the technician the job is assigned to

Where: Tasks, on the job's card

Accepting tells your supervisor you have seen the job and will do it.

1. Find the card with the status **Assigned**.
2. Tap **Accept**.

The message **Job accepted** appears, the status chip changes to **Accepted** and the **Accept** button disappears.

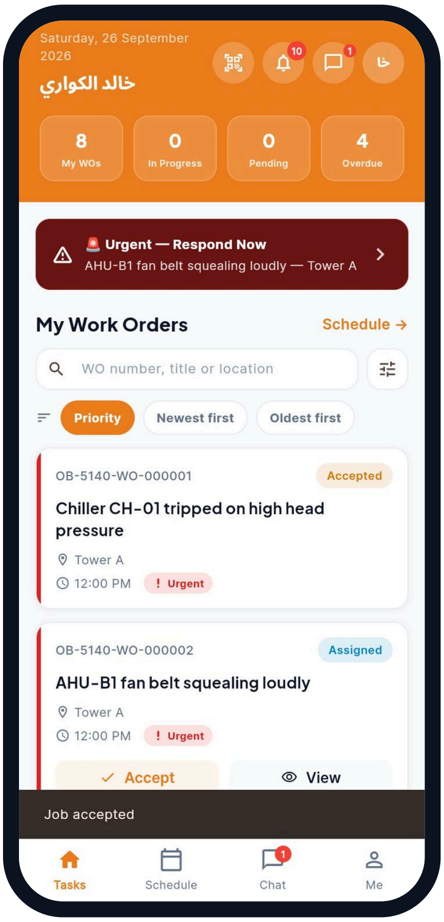


Figure 9 The chiller job after tapping Accept, with the Job accepted message

BUSINESS RULE

You can accept only a job whose status is **Assigned**. The **Accept** button is on the card in the list, not inside the job. You can also skip accepting and go straight to **Start Work**.

Open a job

Who: any technician

Where: tap a job card, **View**, the urgent banner, a notification, a scan result or a schedule tile

The job screen has a header and four tabs.

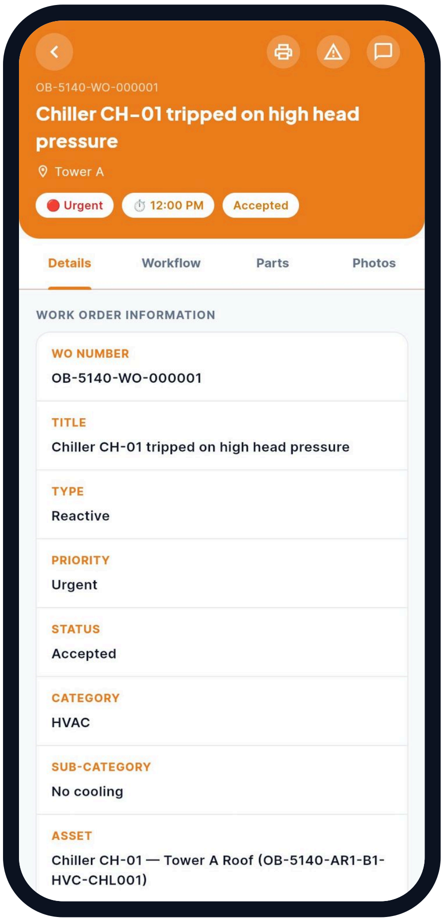


Figure 10 The Details tab of an accepted urgent job

The header shows the work order number, the title, the location, the priority, the scheduled time and the status. The three icons at the top right are:

- **Print work order**: makes a PDF of the job.
- **Report incident**: opens the incident form linked to this job (see Report a safety incident).
- **Chat about this work order**: opens the job's conversation (see Chat).

The tabs are:

Tab	What you do there
Details	Read the job: type, priority, category, asset, location, description, dates, the assigned team and technician, and the SLA targets.
Workflow	Start the job, log your work, decline it or finish it.
Parts	Use parts from your van, request parts and see what was issued.
Photos	Add the before and after photos.

Scroll down the **Details** tab to see the assigned team, the response and resolution targets and whether each SLA was met.

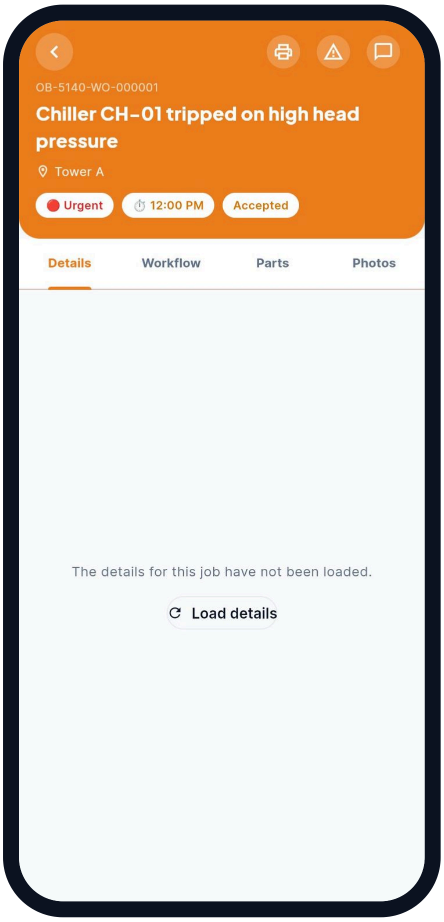


Figure 11 Lower on the Details tab: the assigned team and the SLA targets

Decline a job

Who: the technician the job is assigned to
Where: job → **Workflow** → **I cannot do this job**

Decline a job when you cannot do it, for example because you are tied up on an emergency. Your supervisor gets your reason and can give the job to someone else.

1. Open the job and tap the **Workflow** tab.
2. Tap the red link **I cannot do this job** under **Start Work**.
3. The sheet **Reject Work Order?** opens. Type the reason in **REJECTION REASON**.
4. Tap **Confirm Reject**.

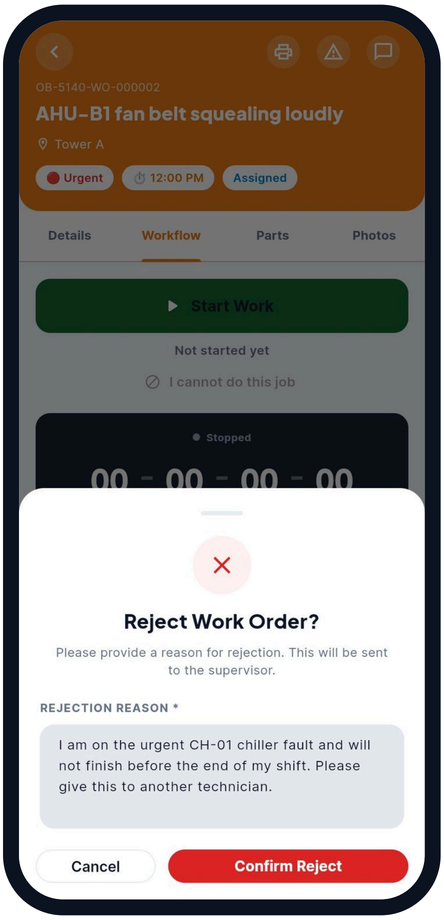


Figure 12 The decline sheet with the reason typed

The job's status changes to **Rejected** and your supervisor is told.

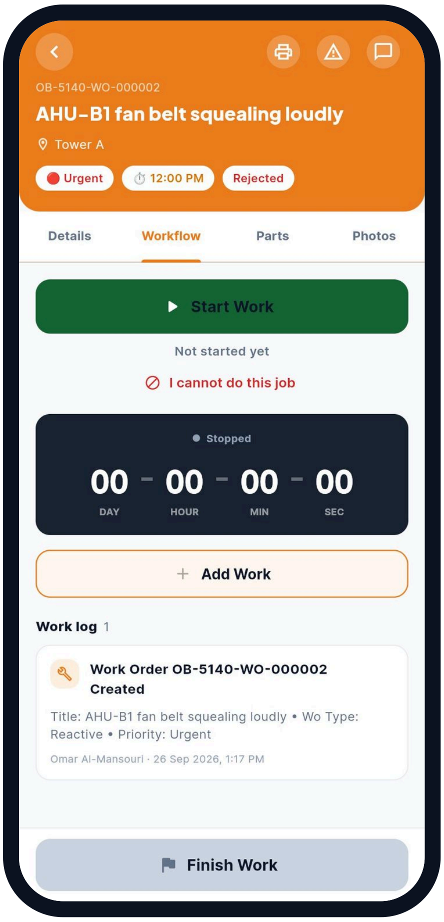


Figure 13 The declined job now shows the Rejected status

BUSINESS RULE

The reason is required. You can decline a job only before you start it. After **Start Work**, finish the job or talk to your supervisor in chat.

Schedule

Who: any technician

Where: bottom tab **Schedule**, or **Schedule →** on the Tasks screen

The Schedule shows one week at a time. Planned maintenance visits (PPM) are grouped under **Planned maintenance**, with a PPM badge and the asset name. Breakdowns and requests are under **Reactive work**.

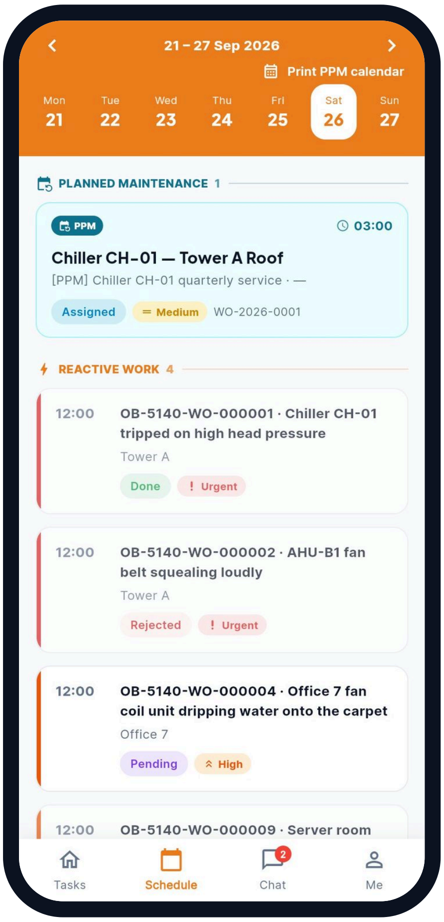


Figure 14 The week of 21 to 27 September with a planned chiller service and four reactive jobs

1. Tap a day in the day strip to see its jobs.
2. Use the arrows beside the week label to move a week back or forward. Tap the week label to return to this week.
3. Tap a tile to open the job.

4. Tap **Print PPM calendar** to make a PDF of your planned visits for the period.

> **NOTE**
> A day with nothing booked shows **No scheduled work**. Jobs without a scheduled time appear in the Tasks list but not on the Schedule.

Doing the work

This part follows a job on site: starting the clock, logging the work, photos, parts and closing the job.

Start work and log what you do

Who: the technician the job is assigned to

Where: job → **Workflow**

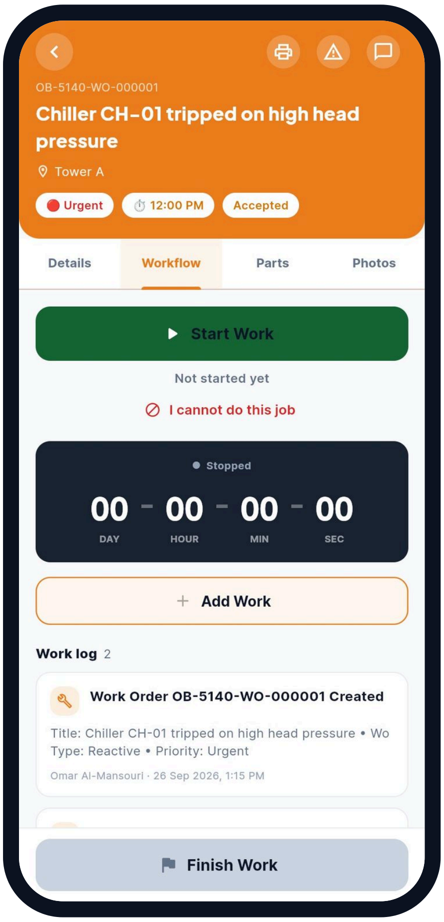


Figure 15 The Workflow tab before work starts

1. When you are at the equipment and ready, tap the green **Start Work** button.
2. The button turns grey and reads **Work started**, with the start time under it. The timer shows the days, hours, minutes and seconds since you started, and the status changes to **In Progress**.

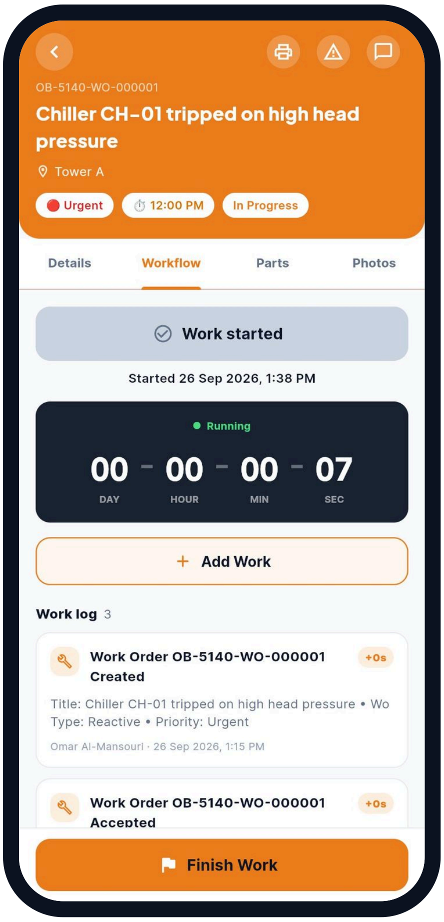


Figure 16 Work started: the timer is running and the status is In Progress

1. As you work, tap **Add Work**. The dialog **Add Work** opens, with the note **Logged against the job clock**.
2. In **WHAT WAS DONE**, type the task in a few words. This field is required.
3. In **HOW IT WAS DONE**, add the tools, parts or steps if useful.
4. Tap **Add Work**.

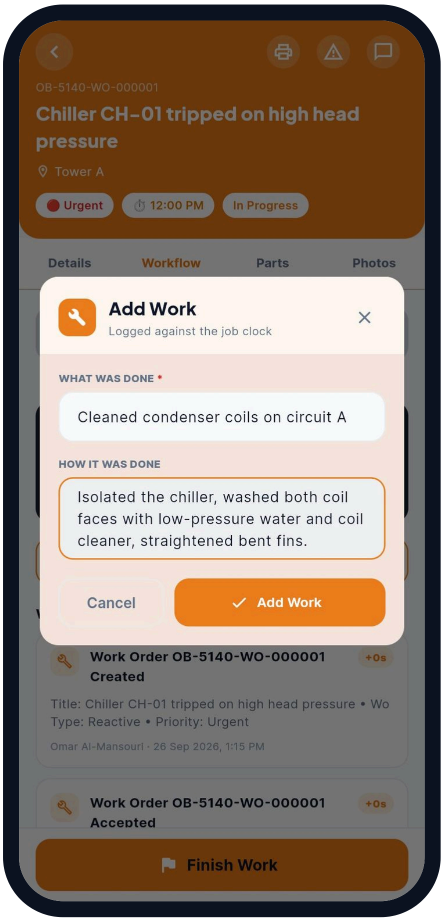


Figure 17 The Add Work dialog filled in

Each entry is added to the **Work log** with its time. The log also shows the job's history: when it was created, accepted and started.

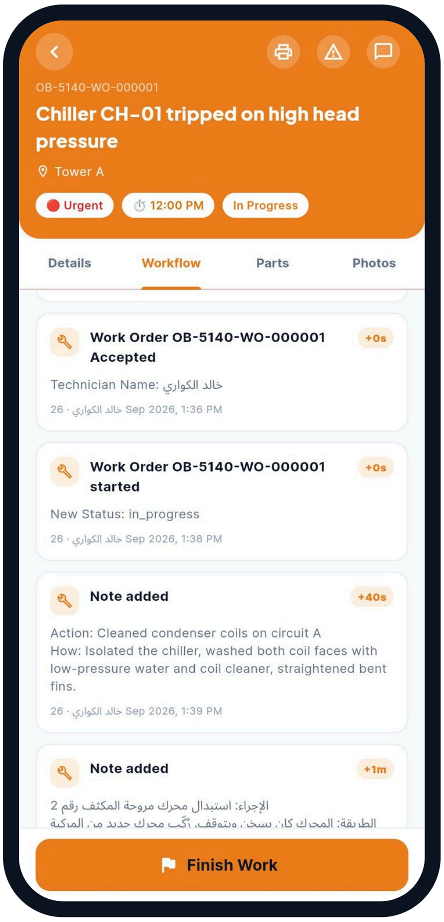


Figure 18 The work log with the two notes added during the job

BUSINESS RULE

Starting the job marks the SLA response as met. The start time is set once; if a second technician presses **Start Work** on the same job, their own time is logged but the job's start time does not move.

TIP

Log each step as you finish it rather than at the end. The office reads the work log while the job is still open.

Before and after photos

Who: the technician working on the job

Where: job → **Photos**

Each job has one **Before Work** photo and one **After Work** photo. They are saved on the job and the office sees them.

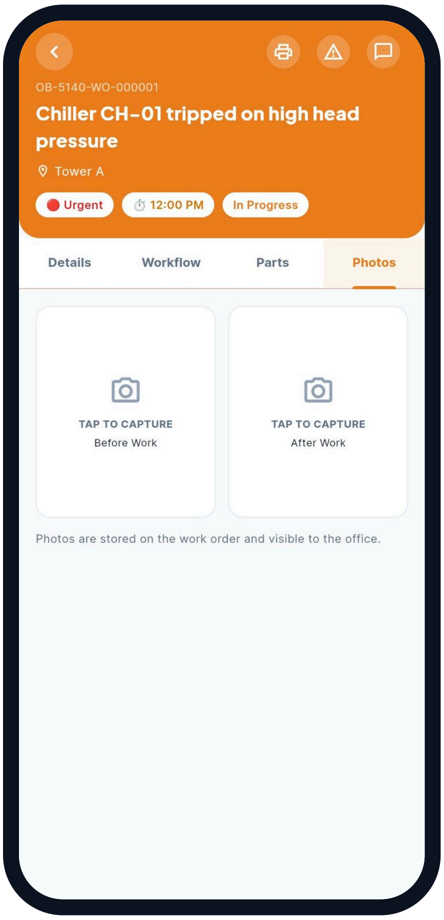


Figure 19 The Photos tab with both slots empty

1. Tap the **Before Work** tile (**TAP TO CAPTURE**).
2. Choose **Take a photo** to use the camera, or **Choose from gallery** to pick a photo you already took.

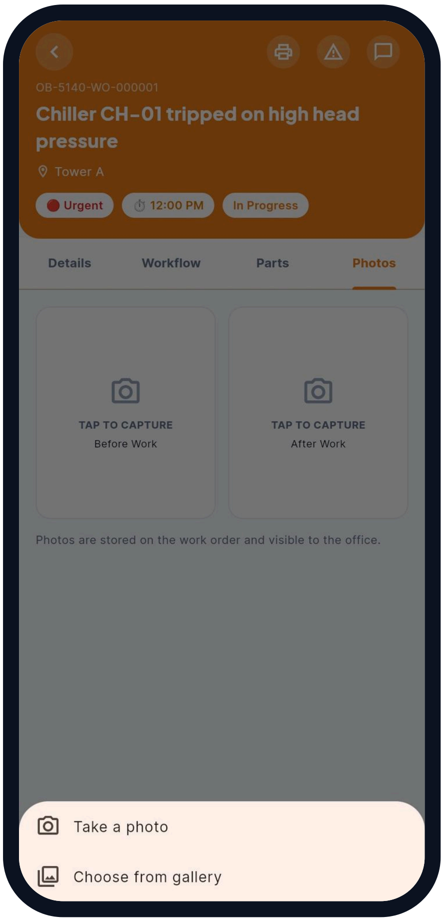


Figure 20 The choice between the camera and the gallery

1. The photo uploads and appears in the tile with a green tick.
2. When the work is done, do the same with the **After Work** tile.

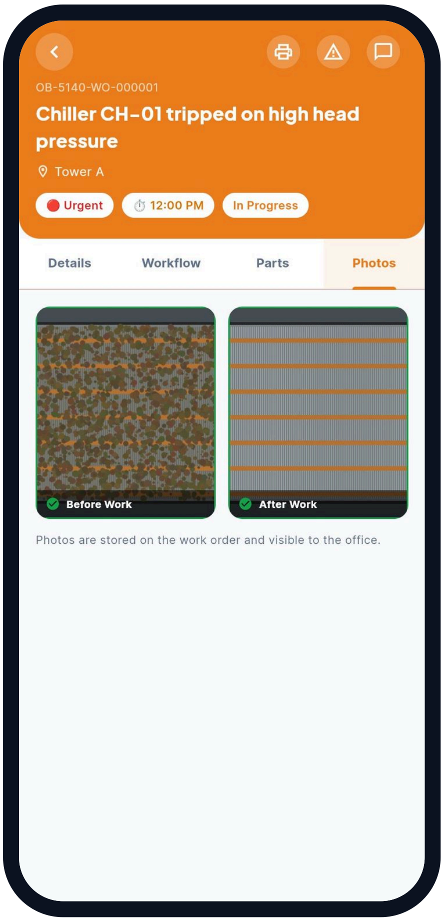


Figure 21 Both photos added

To change a photo, tap it. You can then **View photo**, **Retake photo**, **Choose from gallery** or **Remove photo**.

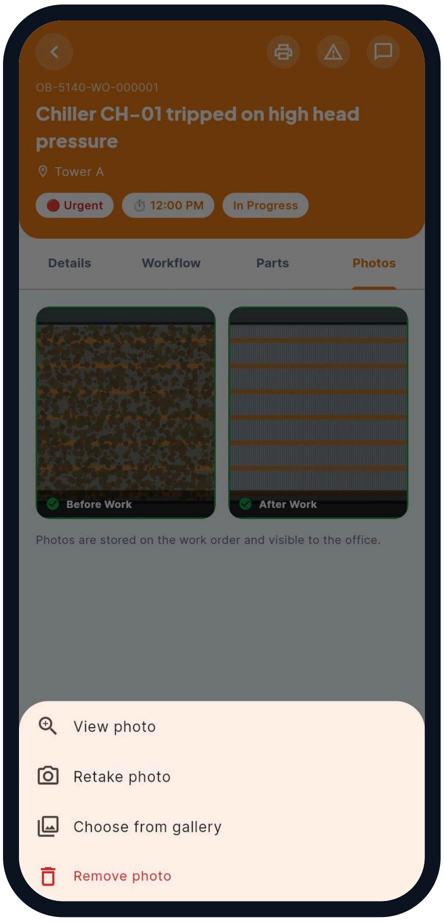


Figure 22 The options for a photo that is already there

Use a part from your van

Who: company technicians who have a van stock location (not contractors)

Where: job → **Parts** → **Use from Van**

When you fit a part you carry in your van, record it against the job. The part is charged to the job and taken off your van stock.

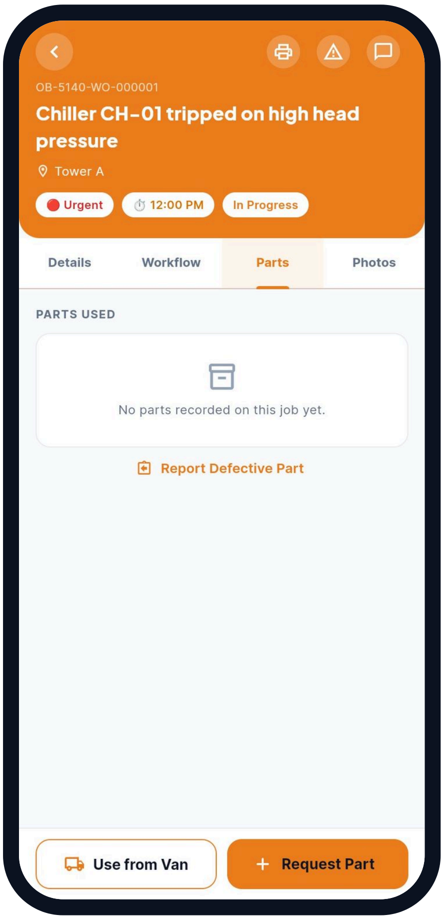


Figure 23 The Parts tab of a job with no parts yet

1. Open the job, tap **Parts**, then **Use from Van**. The screen **Use a part** lists what is in your van with the quantity.
2. Find the part: scroll, type in **Search your van by name or code**, or tap the scan icon to scan the part's barcode.

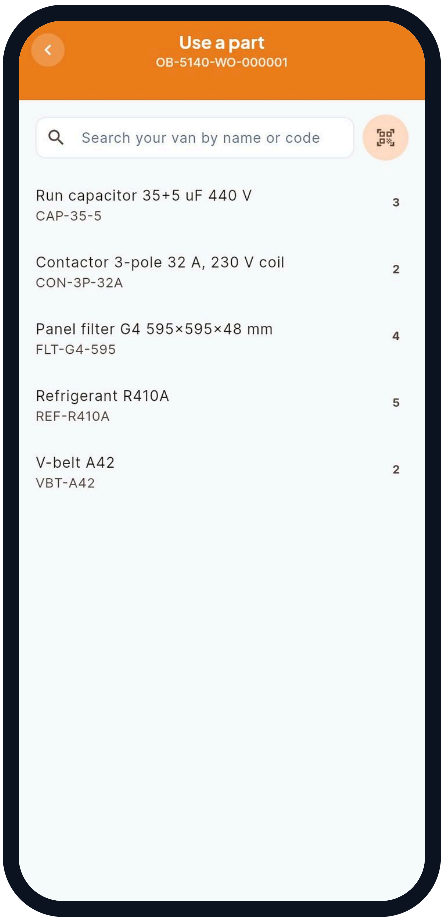


Figure 24 The parts in Khalid's van

1. Tap the part. Under **How many?**, use **+** and **–** to set the quantity.

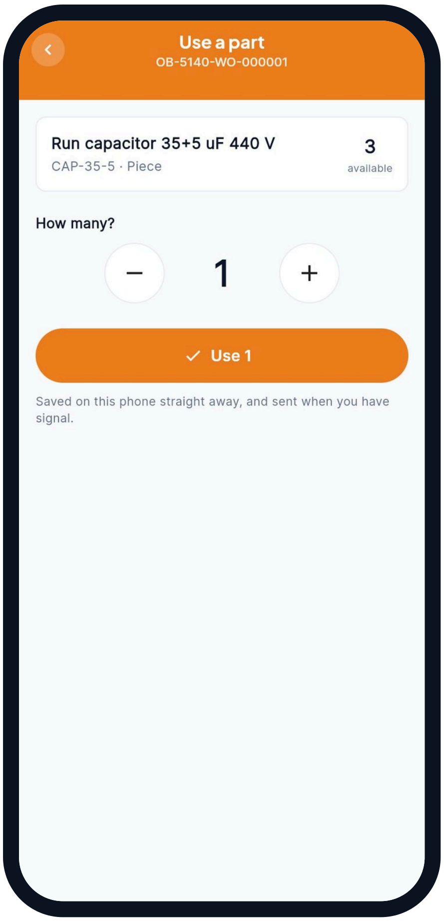


Figure 25 One run capacitor chosen

1. Tap **Use 1** (the number follows the quantity).

The app confirms, for example **1 × CAP-35-5 recorded**, and returns to the job.

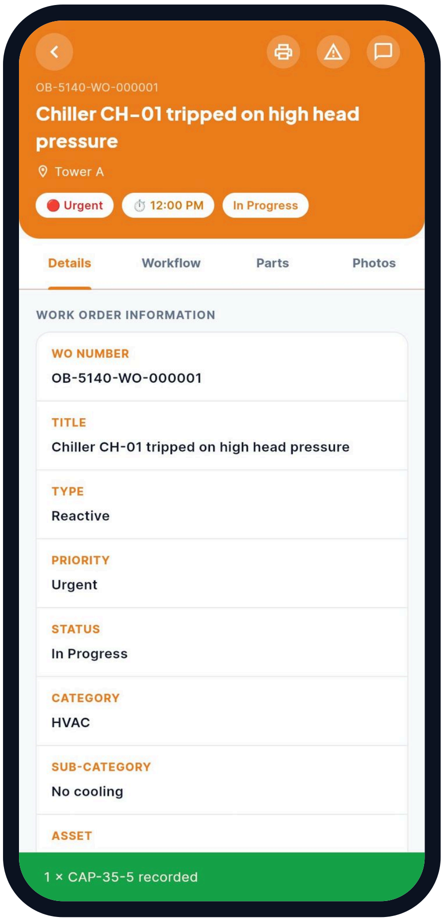


Figure 26 The confirmation after recording the part

BUSINESS RULE

A part must always be recorded against a job, so open **Use a part** from the job. If you open it from **My Van Stock** and have more than one open job, the app asks which job the part is for.

NOTE

You can record a part even if your van shows fewer than you are using. The store sees the difference and corrects it.

TIP

If the list says **Nothing in your van to use yet** although you carry parts, open **Me → My Van Stock** once so the app downloads your van, then try again.

Request a part from the store

Who: company technicians (contractors use **Add Item** instead)

Where: job → **Parts** → **Request Part**

Ask the store for a part you do not have. The request goes to approval, then the storekeeper issues it for this job.

1. Open the job, tap **Parts**, then **Request Part**. The sheet **Add Part** opens.
2. Under **FIND IN INVENTORY**, type part of the name or code. Each result shows how many are in stock, or **Out of stock**.
3. Tap the part you need.
4. Set the **QUANTITY** and, if useful, a note in **NOTES**.
5. Read the line at the bottom: **In stock — goes to the storekeeper for issue once approved.** or that a purchase order will be raised.
6. Tap **Request Part**.

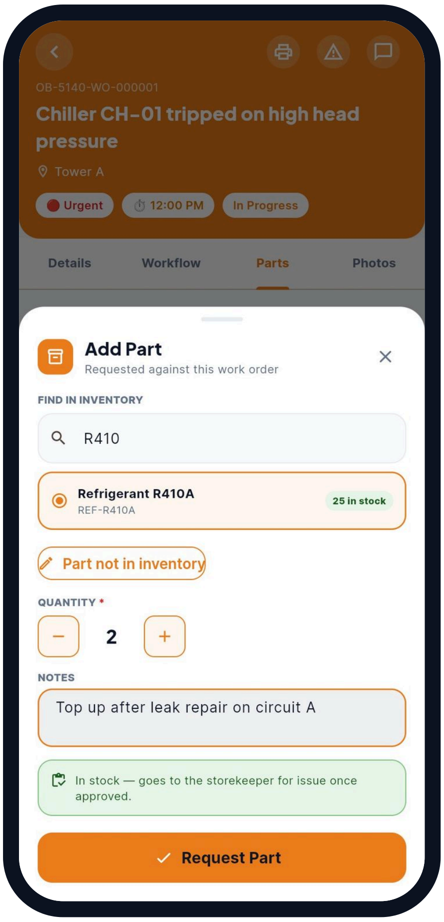


Figure 27 Two kilograms of refrigerant requested from stock

If the part is not in the list, tap **Part not in inventory**, type the **PART NAME** and, if you know it, the **PART CODE**, then tap **Request Part**. A purchase order is raised for it.

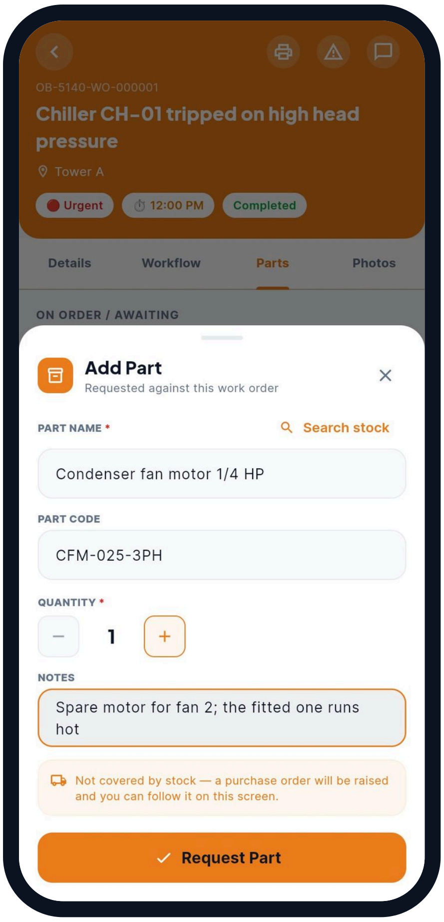


Figure 28 A part that the store does not stock, typed in by hand

The message **Part requested.** appears. The request is listed under **ON ORDER / AWAITING** with its status. For a purchased part you can follow each step: **Requested**, **Approved**, **Ordered from supplier** and **Received**, and how long you have been waiting.

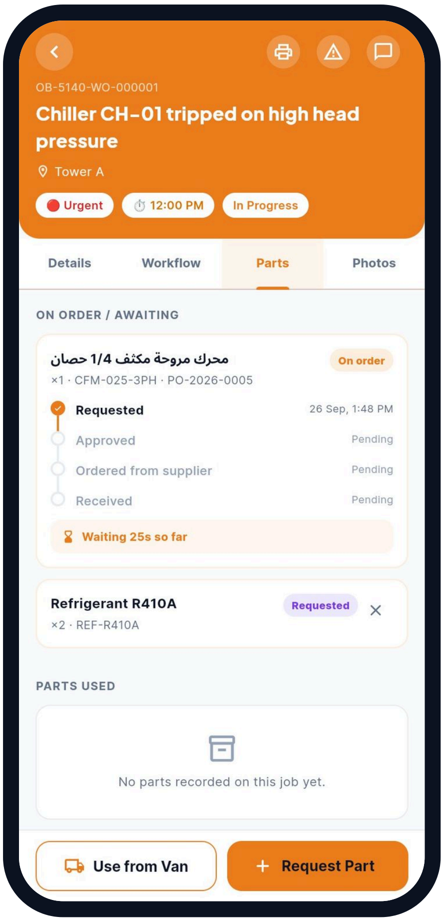


Figure 29 Two requests on order: the fan motor on a purchase order and the refrigerant from stock

When the storekeeper issues the part, you get a notification and the part moves to **PARTS USED** with its cost. The **Total materials** line adds up the cost of the parts on the job.

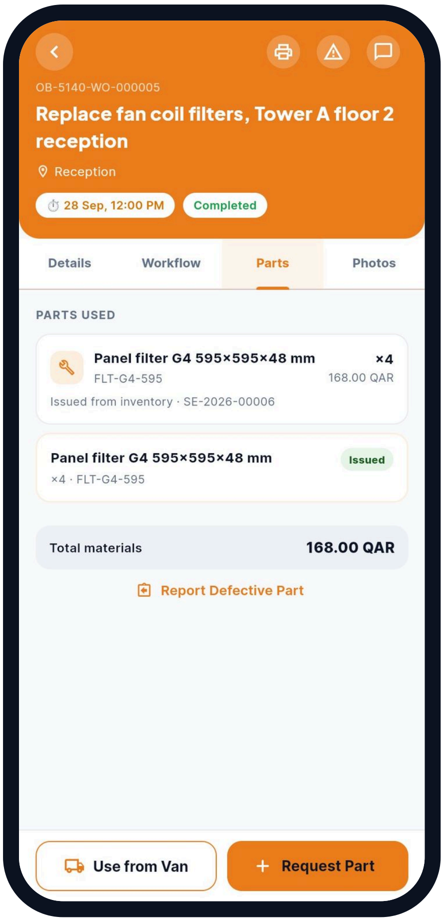


Figure 30 Filters issued by the store listed under Parts used, with the total

To withdraw a request that nobody has approved yet, tap the ✕ beside it, then **Cancel it** in the dialog **Cancel request**.

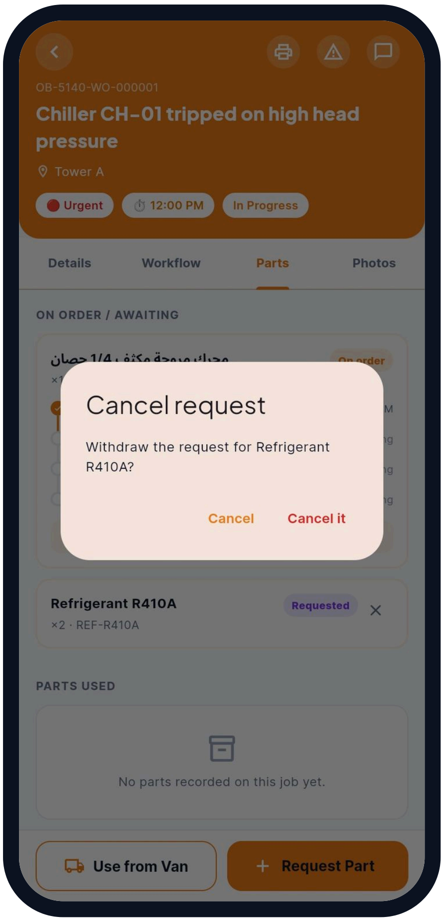


Figure 31 Withdrawing a request that is still waiting for approval

Report a defective part

Who: company technicians

Where: job → **Parts** → **Report Defective Part**

Use this when a part the store issued for this job turns out to be faulty. You choose whether you want a replacement or a refund.

1. Open the job, tap **Parts**, then **Report Defective Part**.
2. Under **DEFECTIVE PART**, tap **Select part** and choose the part. Only parts issued to this job are listed.
3. Set the **QUANTITY**.
4. Under **RESOLUTION**, choose:
   - **Replace**: the faulty part is swapped and a replacement goes back into stock.
   - **Refund**: the part is returned and its value is credited back.
5. Describe the fault in **REASON**.
6. Tap **Submit**.

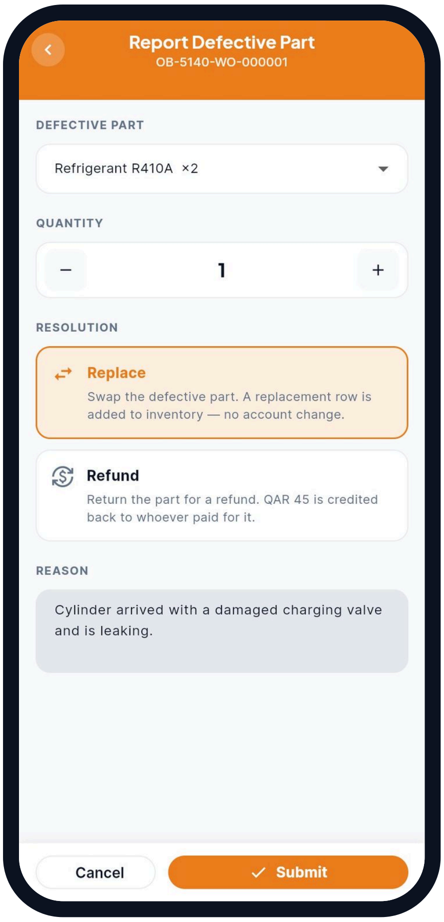


Figure 32 Reporting a leaking refrigerant cylinder for replacement

> **BUSINESS RULE**
>
> You can return at most the quantity that was issued to the job, and only for the same job.

> **CAUTION**
>
> Reporting a defective part creates a stock movement. If you see **You do not have 'create' permission on Stock Movement**, ask your administrator to give the technician role that permission in the web app.

Finish and complete a job

Who: the technician working on the job
Where: job → **Workflow** → **Finish Work**

1. When the work is done, tap **Finish Work** at the bottom of the **Workflow** tab. The button works only after **Start Work**.
2. The dialog **Finish work?** shows how long the timer has run. Tap **Finish**.

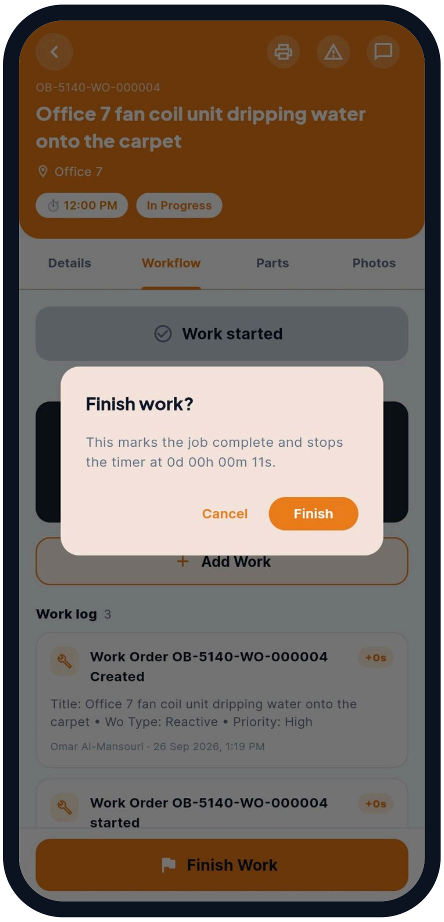


Figure 33 The Finish work? confirmation

1. The sheet **Mark as Complete?** opens. It shows the work order, the **Time Spent** and the number of **Parts Used**.
2. In **COMPLETION NOTES (OPTIONAL)**, write what you found and what you did.
3. Under **ROOT CAUSE**, tap the cause that fits: **Wear and tear**, **Component failure**, **Installation fault**, **Misuse**, **Environmental** or **No fault found**.

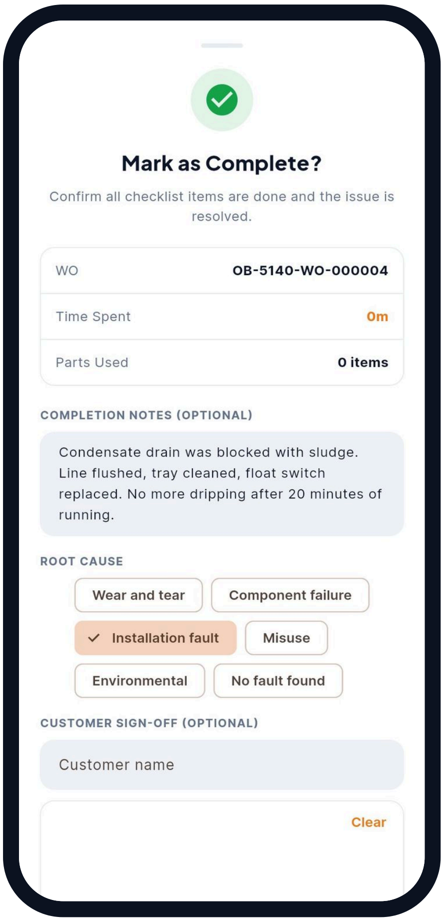


Figure 34 The completion sheet with notes and a root cause

1. If the customer is with you, fill in **CUSTOMER SIGN-OFF (OPTIONAL)**:
   - **Customer name**.
   - The customer signs in the box with a finger. **Clear** wipes it.
   - **Customer rating**: tap one to five stars.
   - **Customer comment (optional)**.
2. Tap **Confirm Complete**.

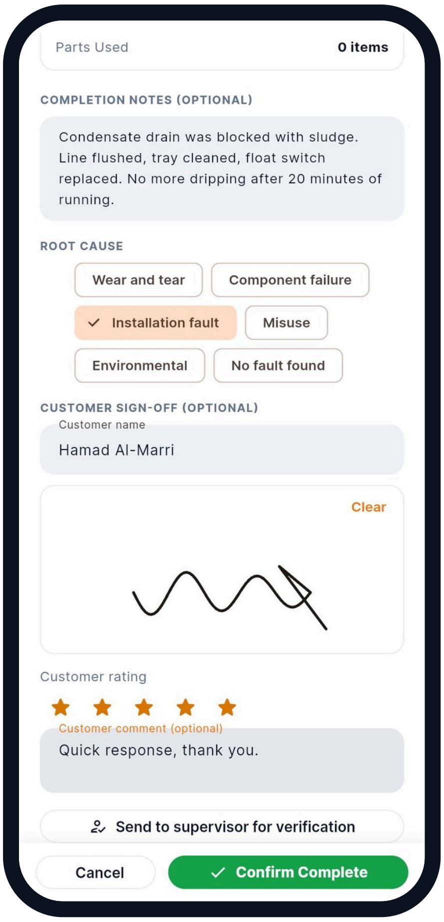


Figure 35 The customer's name, signature, rating and comment

The message **Work order completed** appears. The status changes to **Completed**, the timer stops and the bar at the bottom reads **Work finished**. The person who raised the request is told the job is done.

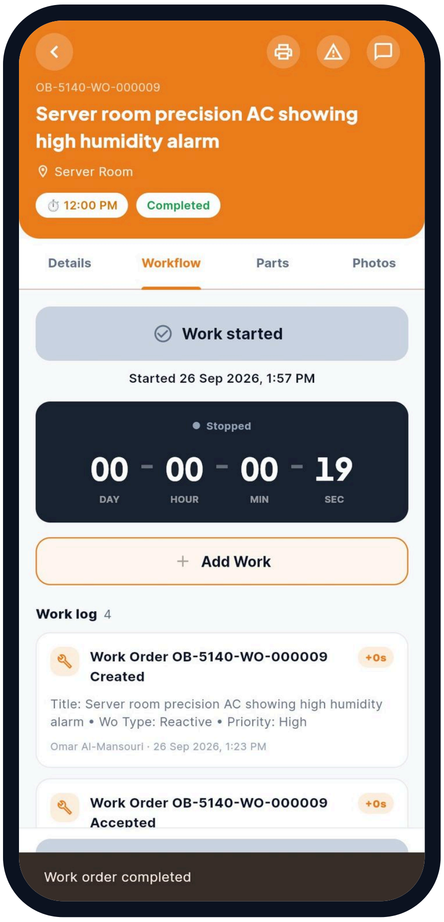


Figure 36 The completed job with the timer stopped

BUSINESS RULE

A signature is accepted only after the work has started. If you draw a signature, the customer's name is required.

Send a job for verification

Who: the technician working on the job

Where: the **Mark as Complete?** sheet

Some jobs must be checked by your supervisor before they close, for example work in an occupied office or a repair that needs testing over time. In that case do not complete the job yourself.

1. Follow steps 1 to 6 of Finish and complete a job.
2. Tap **Send to supervisor for verification** instead of **Confirm Complete**.

The message **Sent to your supervisor for verification** appears and the status changes to **Pending**. Your supervisor verifies the job in the web app, which closes it.

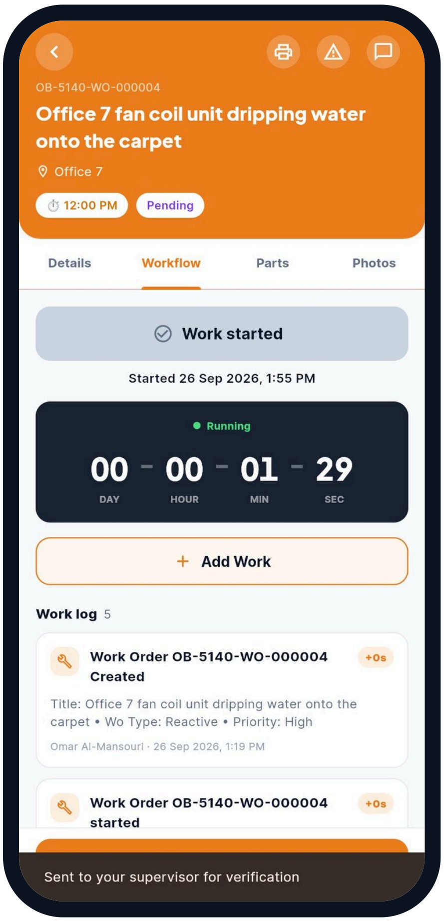


Figure 37 The job sent for verification, now showing Pending

BUSINESS RULE

You can send a job for verification only while it is **In Progress**.

Jobs whose completion needs approval

Who: technicians in companies that require approval to close work orders

Where: Confirm Complete

Your company can decide that a completed job must be approved before it counts as closed. This is set in the web app under **Settings → Approvals → Work order — closing**.

When this rule is on:

1. You complete the job as usual with **Confirm Complete**.
2. The job does not close yet. It stays **In Progress** in your list while the approver reviews it in the web app under **Approvals**.
3. When the approver taps **Approve**, the job changes to **Completed**. If the approver rejects it, it stays open and your supervisor tells you what is missing.

CAUTION

While the job waits for the approver the app still shows **Work order completed**. Do not complete the same job again; check with your supervisor if it stays **In Progress** for long.

NOTE

A job can also wait for approval before any work starts, when your company approves new work orders. It then shows an amber banner **Awaiting approval** on the **Details** tab, and **Start Work**, updates and completion are refused until an approver releases it.

Report a safety incident

Who: any technician

Where: job header → **Report incident**, or **Me** → **Safety** → **Report incident**

Report an injury, a near miss, damage or a hazard straight away. When you start from a job, the report is linked to it.

1. Open the job and tap the warning triangle **Report incident** in the header. A banner shows **Linked to work order** and its number.
2. In **WHAT HAPPENED**, write a short title.
3. Choose the **TYPE** (**Safety**, **Security**, **Environmental**, **Operational**) and the **SEVERITY** (**Minor**, **Major**, **Critical**).
4. Check **WHEN IT HAPPENED** (it cannot be in the future).
5. In **DETAILS**, describe what happened, who was involved and what you did.
6. Switch on **Near miss** if nobody was hurt and nothing was damaged, or **Lost-time injury** if someone could not work their next shift (then enter the days lost).
7. Add a photo under **PHOTO - OPTIONAL** if you can.
8. Tap **Submit report**.

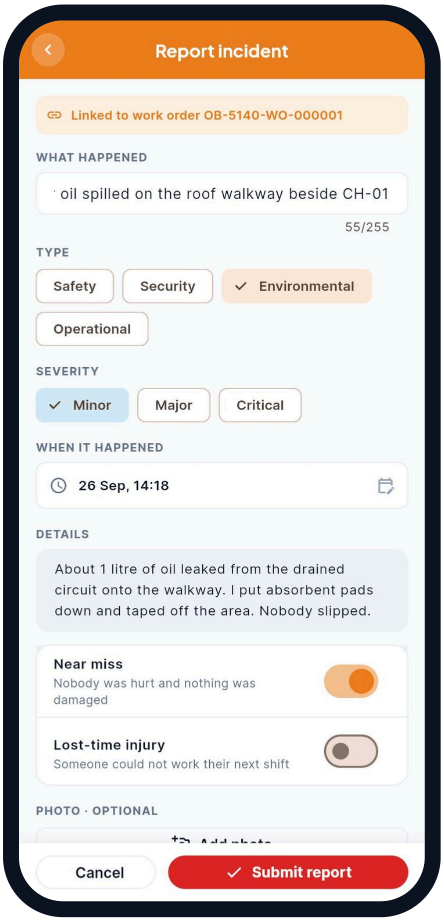


Figure 38 An environmental incident linked to the chiller job

The app confirms with the incident number, for example **Incident INC-2026-0001 reported**. The health and safety team follows it up in the web app.

Tools on the go

This part covers the QR scanner, chat, notifications, your van stock and your tools.

Look up an asset by its QR tag

Who: any technician

Where: Tasks → the QR icon at the top

Scan the QR tag on a piece of equipment to see what it is and which jobs are open on it. Scanning does not change any job status.

1. Tap the QR icon at the top of the **Tasks** screen. The screen **Scan Asset QR** opens.
2. Point the camera at the tag. Use the torch icon in dark plant rooms.

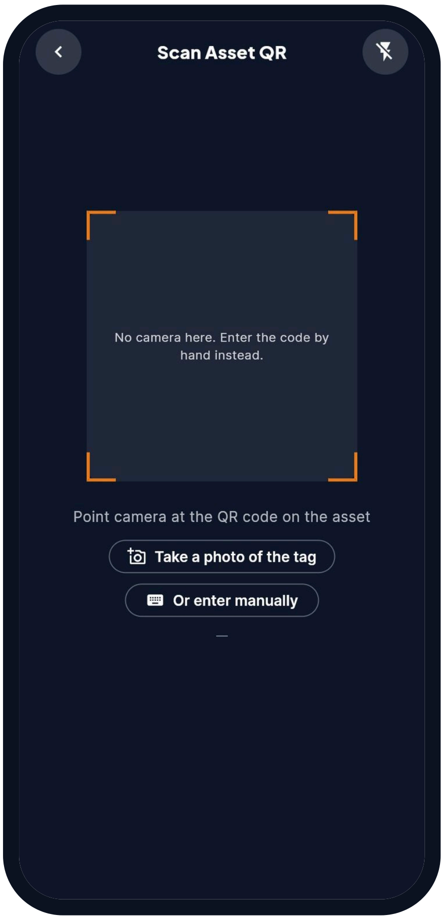


Figure 39 The scanner screen

1 If the tag will not scan, tap **Or enter manually**, type the code printed on the tag (for example `OB-5140-AR1-B1-HVC-CHL001`) and tap **Look up**. You can also tap **Take a photo of the tag**.

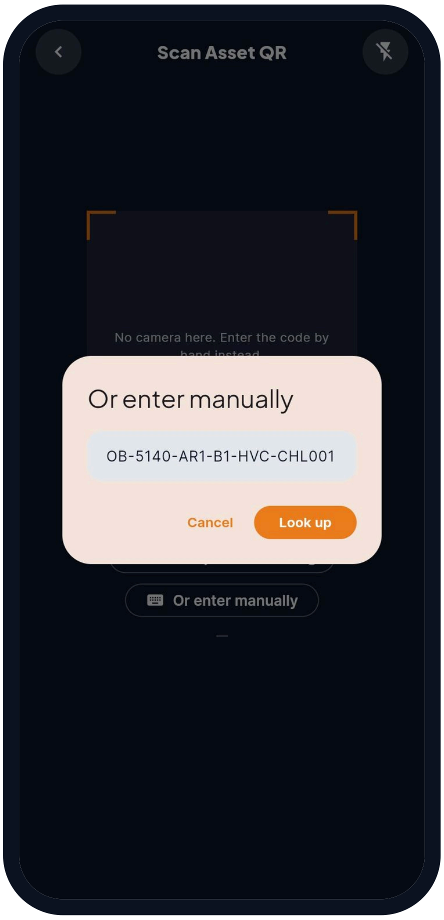


Figure 40 Typing the asset code by hand

1 The sheet **ASSET SCANNED** shows the asset name, its code and location, and the **Jobs on this asset**. Tap a job to open it.

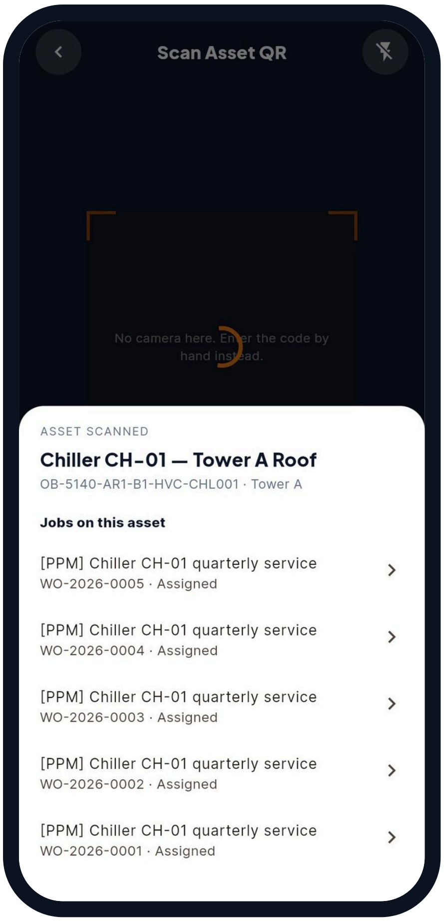


Figure 41 Chiller CH-01 and the jobs raised on it

NOTE

If the phone has no camera or you refuse camera access, the viewfinder reads **No camera here. Enter the code by hand instead.** Manual entry still works.

TIP

If you scan a CAFM Way tag with the phone's own camera app, the Technician app opens straight on the scan result.

Chat

Who: any technician

Where: bottom tab **Chat**, or the chat icon in a job's header

The **Messages** screen lists your conversations, newest first, with the last message and its time. A red number on the **Chat** tab shows unread messages.

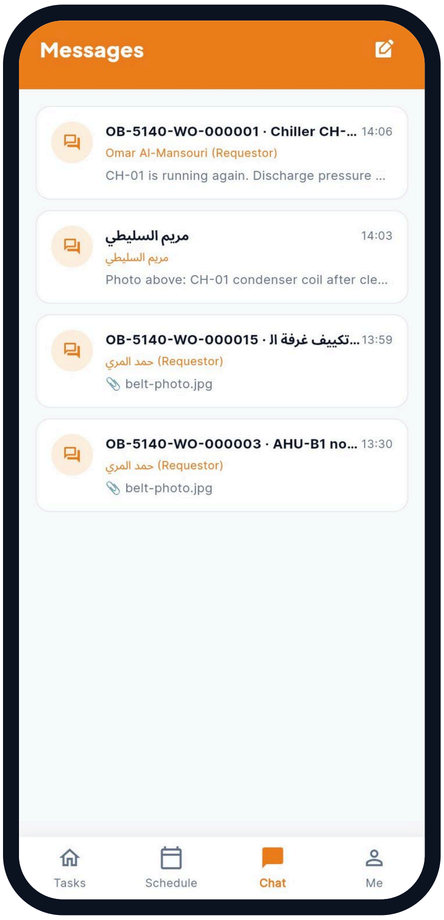


Figure 42 The Messages list with a direct conversation and several job conversations

Start a conversation with a person

1. Tap the new-message icon at the top right.
2. In **Search people**, type a name and tap the person.

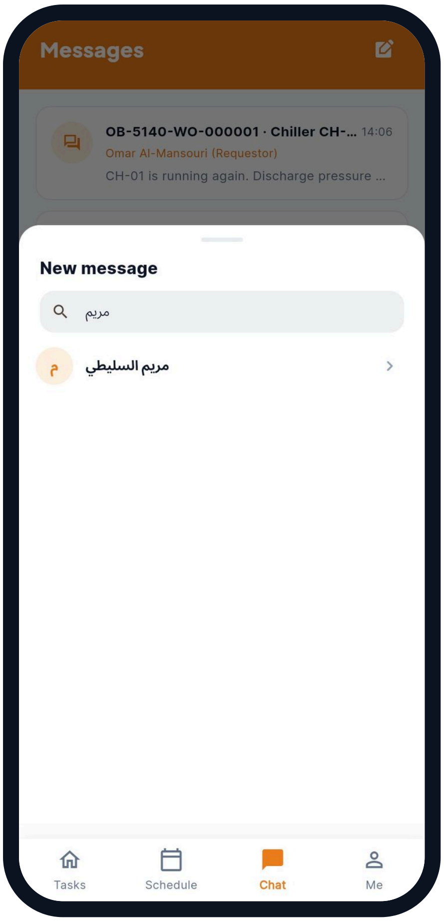


Figure 43 Finding a colleague to message

1. Type your message and tap the send button.

Talk about a job

1. Open the job and tap **Chat about this work order** in the header.
2. The job's conversation opens, with everyone involved in the job. Your first message creates it if it does not exist yet.

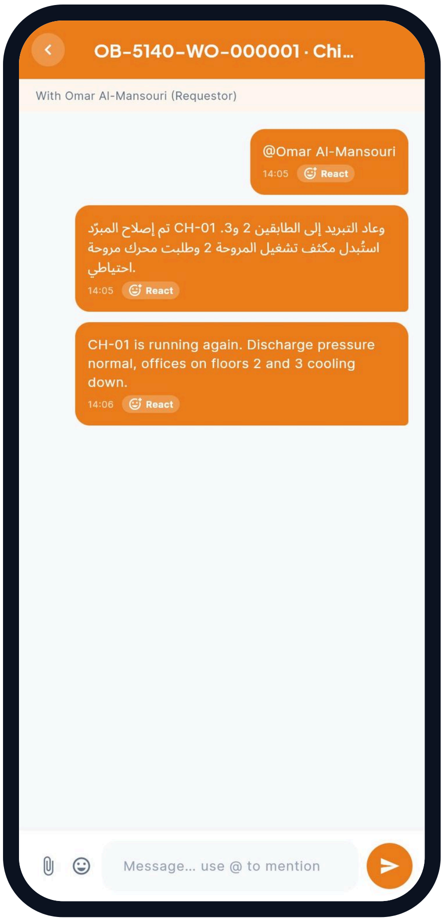


Figure 44 A job conversation

In a conversation

- Type **@** to mention someone. People not yet in the conversation are marked **Will be added**.
- Tap the paperclip to **Take a photo**, **Choose from gallery** or **Attach a document**.
- Tap the smiley to add an emoji. Tap **React** under a message to react to it.

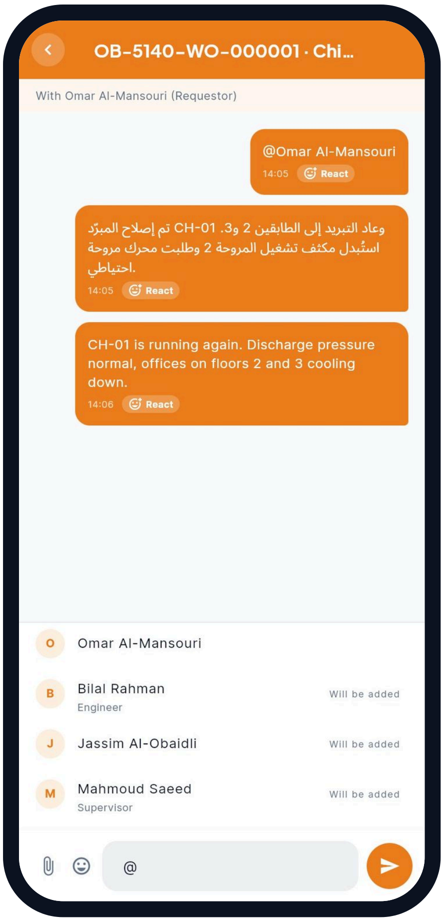


Figure 45 Mentioning a person with @

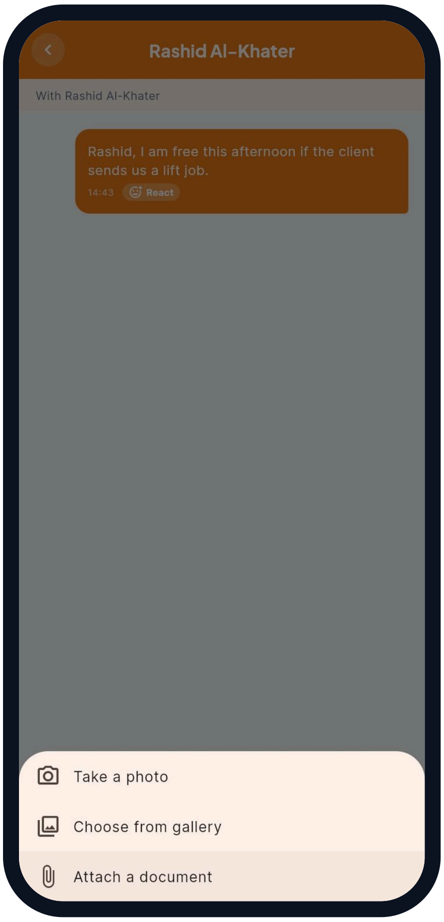


Figure 46 Attaching a photo or a document

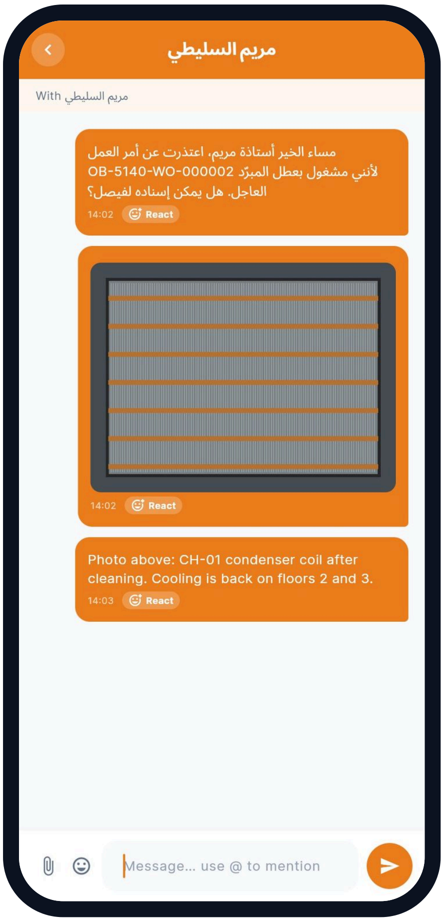


Figure 47 A conversation with a supervisor, including a photo

Notifications

Who: any technician

Where: the bell icon at the top of **Tasks**

You are notified when a job is assigned to you, when someone mentions you in chat, and when your part requests move (approved, issued, ordered).

1. Tap the bell. The screen **Notifications** shows the number unread under the title. Unread items have an orange dot.
2. Tap a notification to open what it is about: the job, the conversation or the job the part is for. It is marked as read.
3. Tap **Mark all** to mark everything as read. The subtitle then reads **All caught up**.

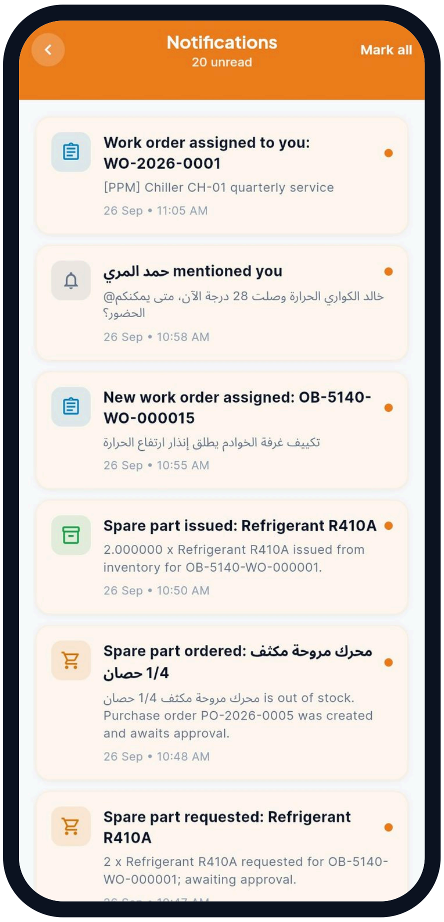


Figure 48 Unread notifications about a new assignment, a mention and part requests

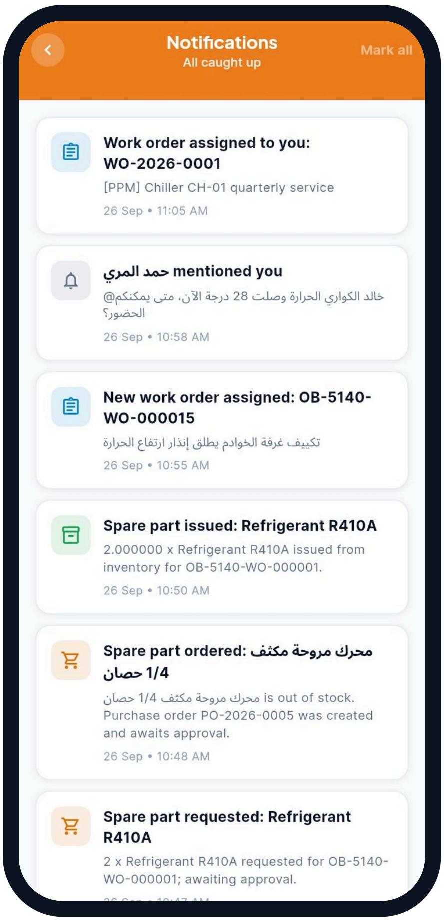


Figure 49 After Mark all

On an installed app, notifications also arrive as phone alerts. Turn them on or off under **Me → Notification Preferences → Push notifications**. Alerts always appear in the app's inbox either way.

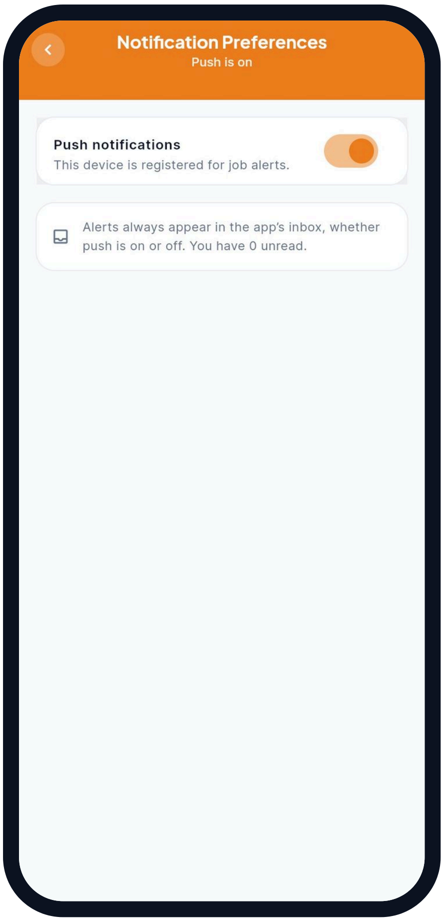


Figure 50 Notification Preferences

My van stock and van count

Who: company technicians who have a van stock location

Where: Me → My Van Stock

The van stock screen lists every part in your van with the quantity available. A part that is reserved for a job also shows **on hand** and **reserved**. The line at the top shows when the list was last downloaded.

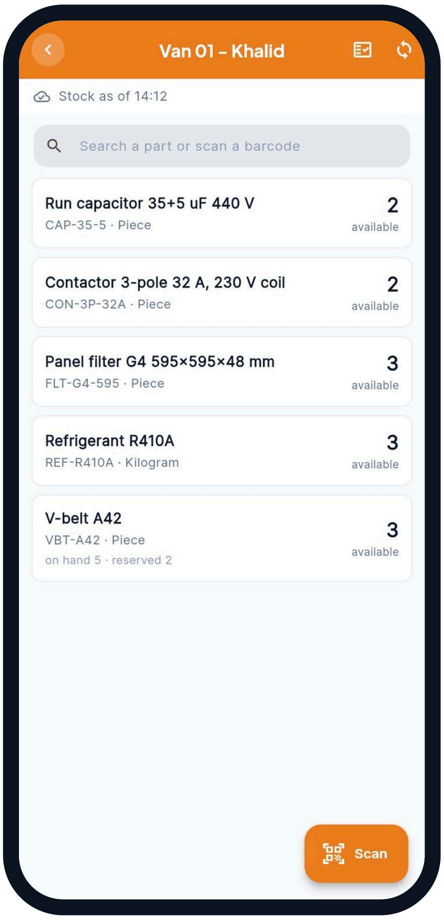


Figure 51 The parts in Van 01 - Khalid

- Tap the refresh icon (**Sync now**) to download the latest figures.
- Tap a part, or **Scan**, to record that you used it (see Use a part from your van).

Count your van

The store asks you to count your van from time to time. The count is blind: you do not see the system quantity until you have entered yours.

1. Tap the clipboard icon **Count my van** at the top.
2. Type the quantity you actually find in the van for each part.

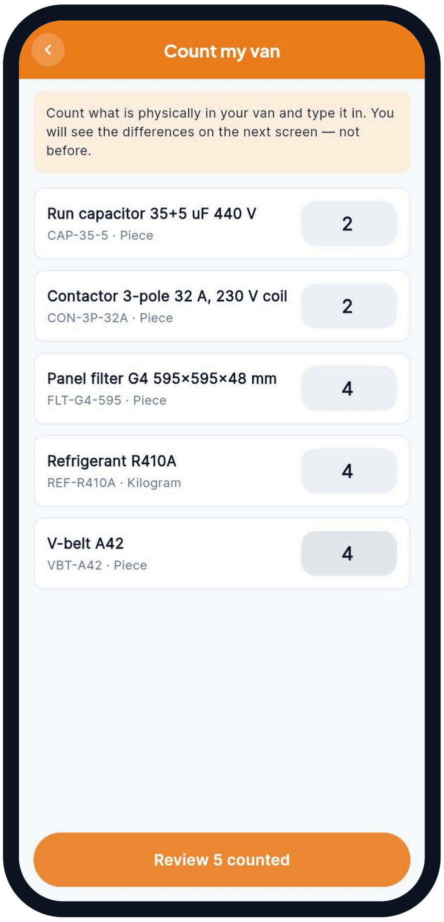


Figure 52 The counted quantities typed in

1. Tap **Review … counted**. The screen **Check your count** shows only the parts where your count differs from the system, for example **system 3 → counted 4**.

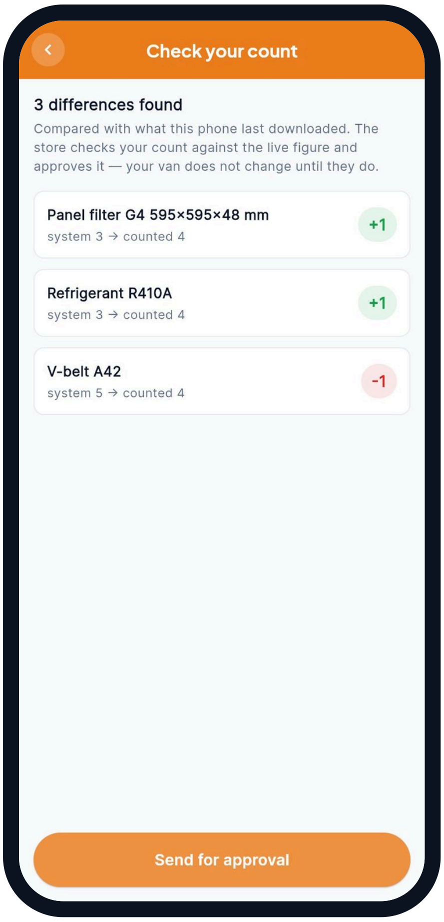


Figure 53 Three differences found

1. Tap **Send for approval**.

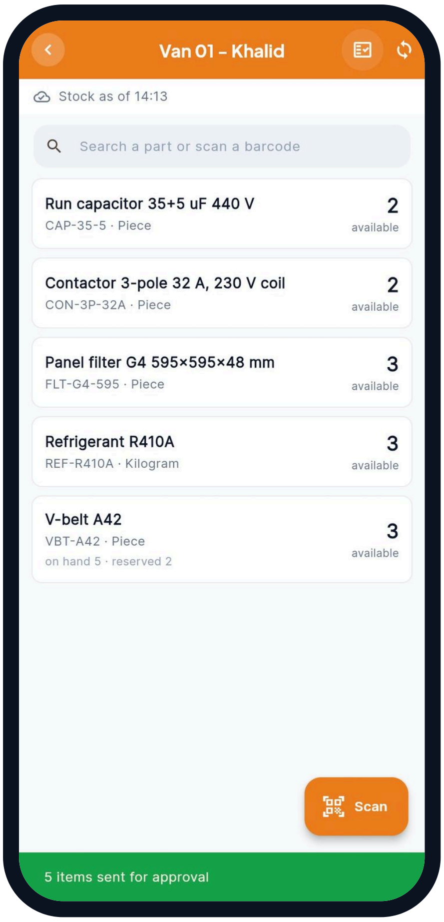


Figure 54 The count sent for approval

BUSINESS RULE

Your van stock does not change until the storekeeper approves the count in the web app. Count at least one part before you can review.

Tools and safety checklists

Who: any technician
Where: Me → Safety

The **Safety** screen has three entries: **Safety checklists**, **Report incident** and **My tools**.

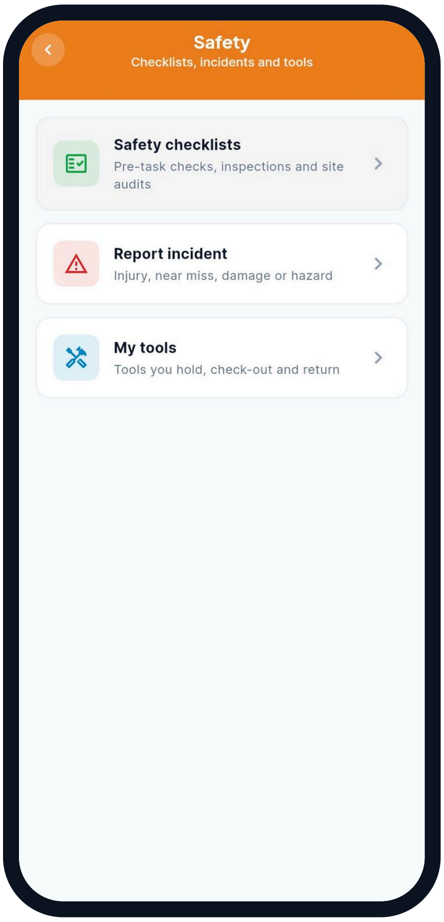


Figure 55 The Safety screen

Check out a tool

1. Open **My tools** and tap **Check out a tool**.
2. Pick the tool from the list (search by name or code).
3. Under **FOR WHICH JOB (OPTIONAL)**, choose the job you need it for, and add a note if useful.
4. Tap **Check out**. The app confirms that the tool is now with you.

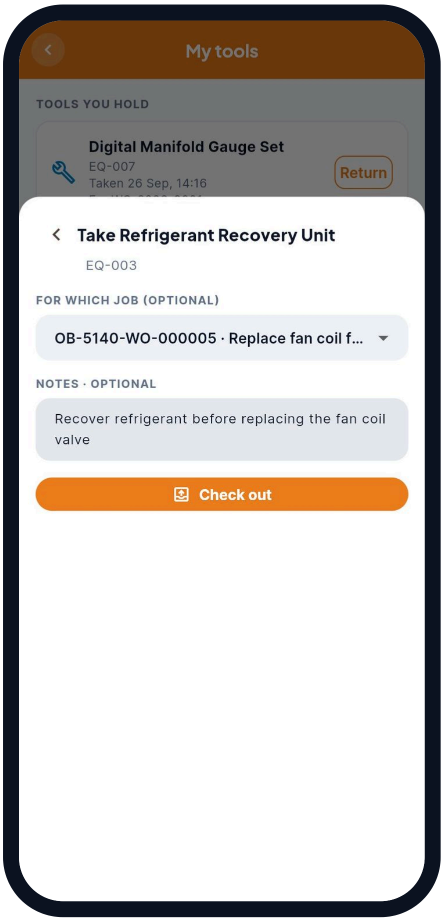


Figure 56 Checking out a refrigerant recovery unit for a job

The tool is listed under **TOOLS YOU HOLD** with the date you took it and the job.

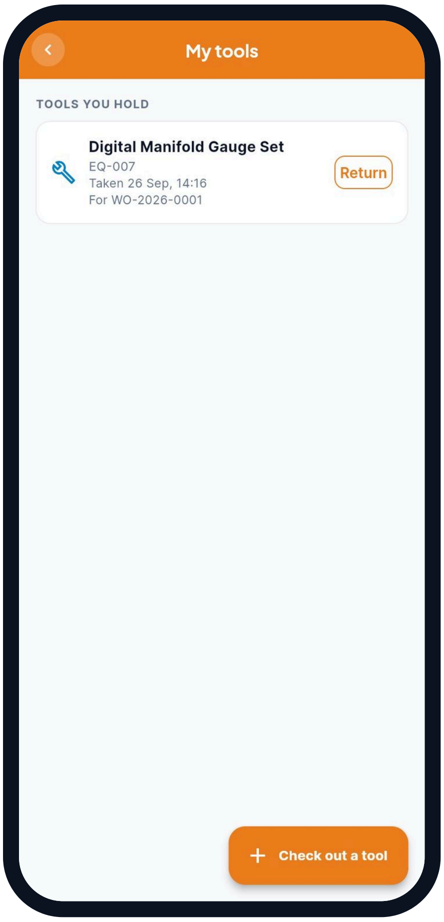


Figure 57 The tools you hold

Return a tool

1. In **My tools**, tap **Return** beside the tool.
2. Choose its **CONDITION**: **Good**, **Worn** or **Damaged**. A damaged tool goes to maintenance.
3. Tap **Return**.

Figure 58 Returning a tool

Safety checklists

When the safety team assigns you a checklist (a pre-task check, an equipment inspection or a site audit), it appears under **Safety checklists** in **To complete**, with its due date. Open it, work through the checklist on site, then enter how many items you **Checked**, how many **Passed** and **Failed**, any **Findings** and the **Corrective actions**, and tap **Submit result**.

> **BUSINESS RULE**
>
> Passed plus failed must equal the items checked. **Corrective actions** are required when any item failed.

Your account

This part covers your profile, language, help, app updates, working without signal and signing out.

Profile and settings

Who: any technician

Where: bottom tab **Me**

The **Me** screen shows your name, job title and skills, then your **Employee ID**, **Department**, **Phone**, **Email** and **Jobs completed**, and your **CERTIFICATIONS**.

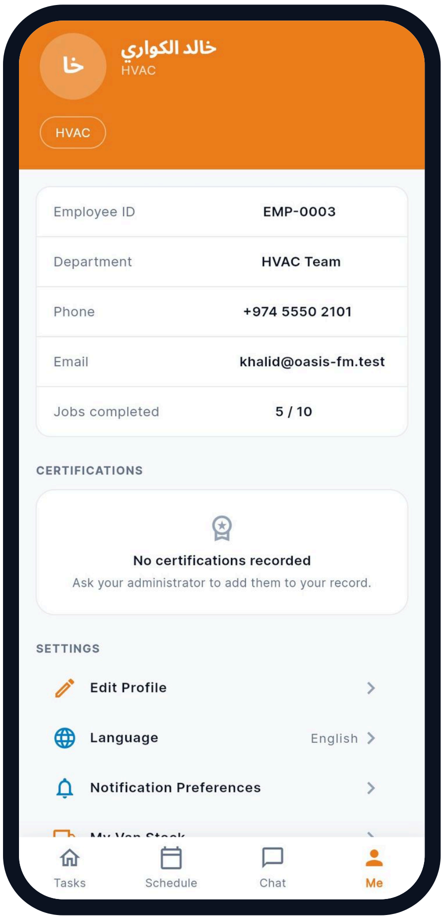


Figure 59 The top of the Me screen

Under **SETTINGS** you find every other screen of the app:

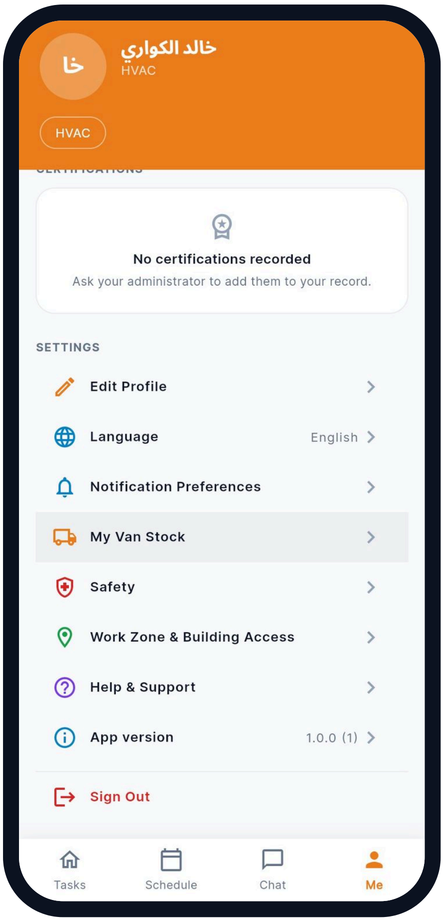


Figure 60 The settings list

Entry	Use it to
Edit Profile	Change your full name and phone number
Language	Choose the app's language
Notification Preferences	Turn phone alerts on or off
My Van Stock	See and count your van (see My van stock)
Safety	Checklists, incidents and tools
Work Zone & Building Access	See your department, skills and the buildings where you have jobs
Help & Support	Answers to common questions and diagnostics
App version	See the version and check for an update
Sign Out	Sign out of this phone

Edit your profile

1. Tap **Edit Profile**.
2. Change your **Full Name** or phone number.
3. Tap **Save Changes**. The message **Profile updated** appears.

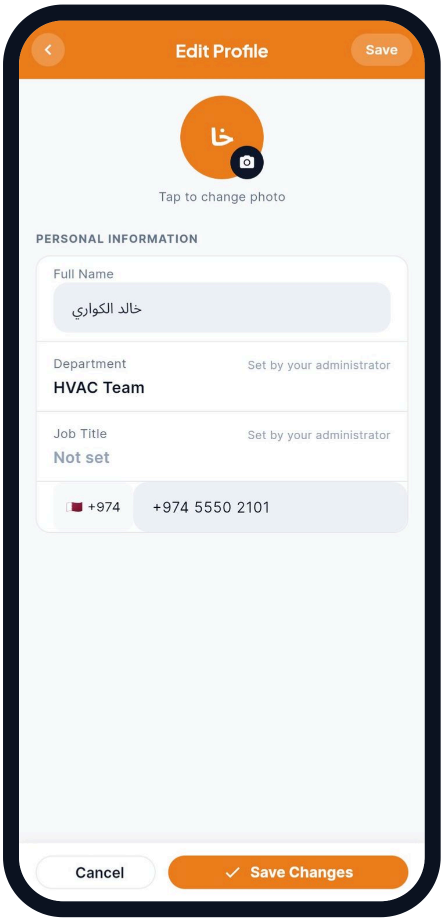


Figure 61 Edit Profile

> **NOTE**
>
> **Department** and **Job Title** are set by your administrator and cannot be changed here. Changing the profile photo from the app is not available yet.

> **BUSINESS RULE**
>
> Certifications are added to your record by your administrator. If yours are missing, ask them.

Language

Who: any technician

Where: Me → Language

1. Tap **Language**.
2. Tap **English**, **العربية** (Arabic), **Français**, **اردو** (Urdu) or **हिन्दी** (Hindi).

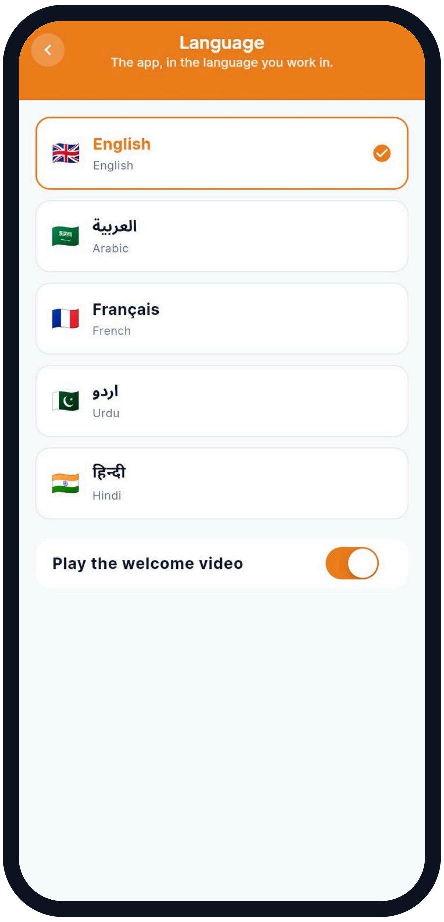


Figure 62 The language list

The whole app switches at once. Arabic and Urdu also turn the layout right to left. A message confirms the new language.

The same screen has the switch **Play the welcome video**.

> **NOTE**
> The language applies to the app's own words. Job titles, descriptions and chat messages appear as they were typed.

Work zone and help

Who: any technician
Where: Me → Work Zone & Building Access, Me → Help & Support

Work Zone & Building Access shows your department, job title and routing skills, and lists the buildings where you have jobs with the number of jobs in each. Building access itself is granted by your administrator.

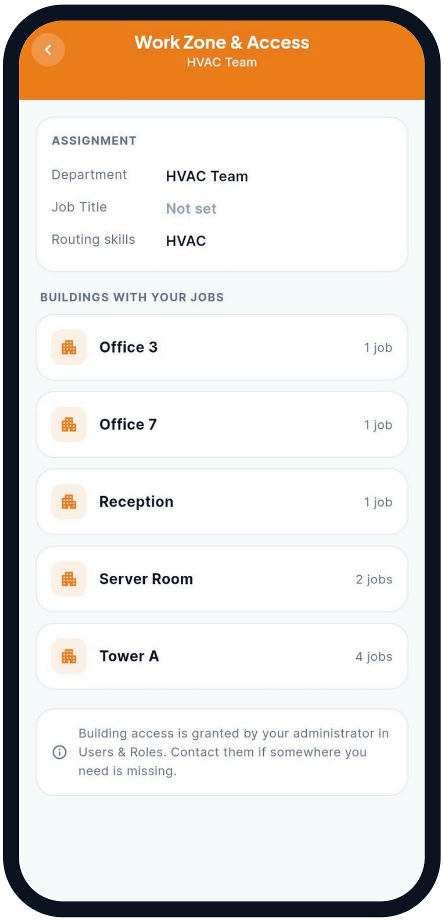


Figure 63 Work Zone & Building Access

Help & Support answers common questions (why a work order or a spare part is missing, an empty job list, changing your department) and has a **DIAGNOSTICS** card. If IT support asks for details, tap **Copy diagnostics** and paste them into your message.

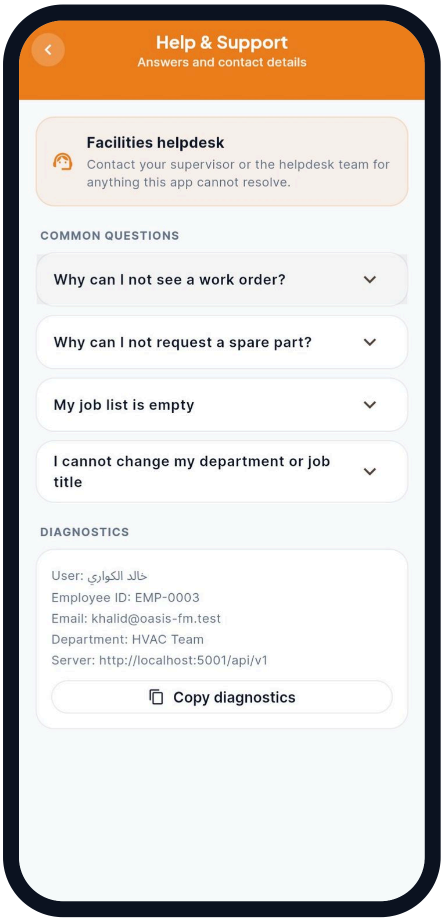


Figure 64 Help & Support

App updates

Who: any technician

Where: appears on its own; **Me → App version** to check

When a newer version of the app is published, a bar appears: **A new version of the app is available.** (or **Version ... is available.**). Tap **Update** to download it, or **Later** to be reminded next time.

If your version is too old to be used, the app shows **Update required** with your version and the new one, and you must tap **Update** before you can carry on.

In the browser version, a bar **A new version of the app has been deployed.** asks you to tap **Reload**.

> **TIP**
>
> Tap **Me → App version** to check for an update at any time. The number shown, for example **1.0.0 (1)**, is what IT support will ask for.

Working without signal

Who: any technician using the installed app

Where: everywhere in **Tasks** and in a job

Plant rooms and basements often have no signal. The installed app keeps working:

- The job list and the jobs you opened are kept on the phone. Without a connection, **Tasks** shows **Offline — showing jobs as of** and the time the list was saved.
- **Accept**, **Start Work**, **Add Work**, photos, the customer signature, decline, **Confirm Complete** and **Send to supervisor for verification** are saved on the phone with the time you did them. The app shows **Saved on this phone — it will be sent when you are back online**, and the job changes on screen straight away.
- A job with unsent changes shows **This job has changes waiting to sync**, and the Tasks screen shows **Changes waiting to sync:** with the number and a **Sync now** button.
- Parts used from the van and van counts are also saved and sent later.

When the signal returns, the app sends everything in the order you did it. If the server refuses a change (for example the office cancelled the job meanwhile), the banner shows **Could not be applied:** with the number. Tap **Review** to see **Changes the server refused**, then **Try again** or **Discard** each one.

> **CAUTION**
> Part requests, defective part reports, chat, safety reports and profile changes need a connection.

> **NOTE**
> The browser version (`technician.cafm-way.com`) needs a connection; it does not keep changes made while offline.

Sign out

Who: any technician
Where: Me → Sign Out

1. Scroll to the bottom of **Me** and tap **Sign Out**.
2. Tap **Sign Out** in the dialog.

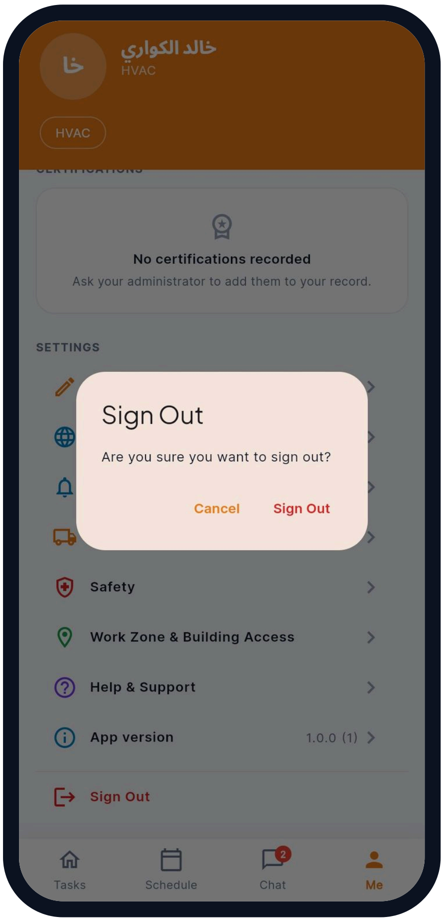


Figure 65 The sign-out confirmation

The app returns to the sign-in screen. Signing out ends the session on this phone only. Any changes not yet sent are kept and sent after you sign in again.

Contractor technicians

This part is for technicians who work for a contractor company, for example Lift Tech Qatar, and use the same app.

What is different for contractors

Who: users of a contractor company with the portal role Technician

Where: the same Technician app

Sign in with the email or contractor user code your account manager gave you (for example `sami@lifttech-qa.test` or `CTR-9129`). After that the app works as described in this guide, with these differences:

Area	Company technician	Contractor technician
Tasks	Jobs assigned to you	Jobs your company assigned to you, and your company's jobs that nobody has taken yet
Parts tab	**Use from Van**, **Request Part**, **Report Defective Part**	One button, **Add Item**, to record a part or material your company supplied
Me	Standard settings	Adds **My Company** and **Reports** (and **SLA Penalties** if your company lets you see financial data)

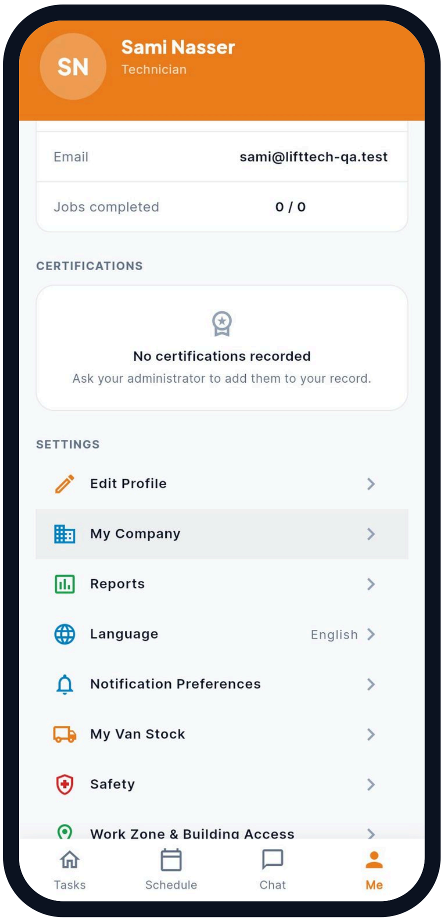


Figure 66 Sami's Me screen with My Company and Reports

Record a part your company supplied

1. Open the job, tap **Parts**, then **Add Item**.
2. Enter the **Item name** and **Quantity**, and if you have them the **Part code**, **Unit price**, **Description**, **Type** (**Spare Part**, **Consumable**, **Tool**, **Other**), **Country of origin** and **Currency**. The line total is calculated for you.
3. Save. The app confirms **Item added to this job**. You can remove an item you added with **Remove item**.

BUSINESS RULE

Contractors do not draw parts from the client's store or vans. The parts clause of your contract decides who pays for what.

NOTE

Your account manager assigns the company's jobs to you. Until they do, a new job for your company appears in your list as a company job that nobody has taken yet.

My Company and reports

Who: contractor technicians

Where: Me → My Company, Me → Reports

My Company shows your company's details. As a technician you see two tabs:

- **Overview**: the number of active contracts and users, and the company information.
- **Work Orders**: the company's jobs.

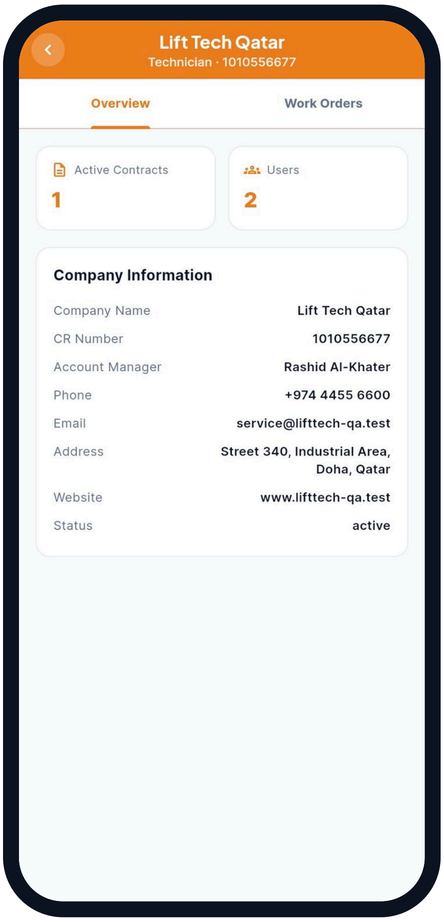


Figure 67 My Company for Lift Tech Qatar

Account managers and supervisors see more tabs (contracts, users, penalties and financials) and can assign company jobs to a technician. That is covered in the contractor part of the web app guide.

Reports lists the reports you can run for your company, such as **Work Orders** (every job assigned to the company in a period, with its SLA outcome) and **PPM Calendar**.

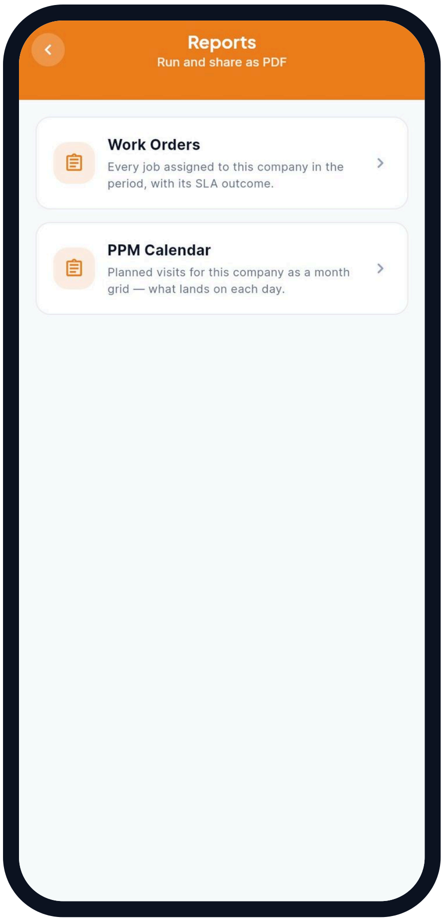


Figure 68 The reports available to the contractor

1. Tap a report.
2. Set **FROM** and **TO**, and narrow by technician, location or escalation if needed.
3. Read the totals on screen, or tap **Export as PDF** to share the report.

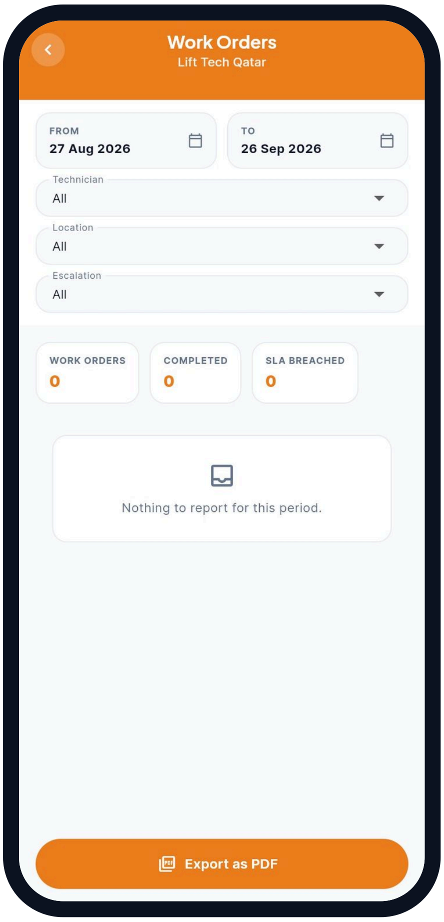


Figure 69 The Work Orders report with its filters