

FAQ

frequently asked questions

page.1

Do I need to download or install any software on my computer?

Because Encore is hosted on the cloud, no installation is necessary. Customers can access their application from anywhere.

Is there a limit of how many users I can have in a tier?

An unlimited amount of users can exist under each tier.

Where do I log in?

After your account is set up, log in to <https://encore.actsoft.com> using the username and password provided to you.

Why can't I access the Encore App?

Verify that you're using the correct log in and password. If you have forgotten your password, select Forgot Password to reset it. If you still can't access the application, contact your system administrator for assistance.

If my industry isn't listed, can I still use the app?

Yes! You can choose the vertical closest to your industry and customize it later to fit your business needs.

How do I get the app on my devices?

You can download the app through the App Store or Google Play.

What mobile devices and operating systems work with this solution?

Encore is compatible with Apple devices on iOS version 5 or higher and Android devices on version 3.0 or higher.

How can I customize the application?

You can change your application's appearance through Administration > Settings > Appearance. Feel free to add your company's logo to the interface, and incorporate brand-sensitive colors into your application's theme as well.

What are the user roles and what access do they have?

Administrators have access to all areas of the application, except billing. They can view the dashboard, access data collection, modify charts, and change module settings. Users have web and mobile access to all modules. Users can view the list of available modules, but can't add them to the company account. Power users have the same access as users with the addition of the ability to edit submitted data. Power users can review, modify, and approve submitted timekeeping and form data, as well as mark forms as shared. Mobile only users can access and complete all modules from a device, but can't log into the web app. Account owner is a special type of administrator account. In addition to other administrative privileges, the account owner controls the account billing information. Only the designated account owner can modify the subscription level, add licenses, or change the payment method. There is only one account owner for a company account. The account owner cannot be deleted, and can't be modified by anyone other than the account owner.

How do I change my subscription?

The account owner will need to contact one of our dedicated sales representatives to change the subscription level on the account.

FAQ

frequently asked questions

page.2

How do I change the account owner?

If you are the current account owner, go to Administrative > Users and select Change Account Owner. You will be able to select a new account owner from the listed employees. Note: There is only one account owner on an account. Once you remove yourself as account owner, you will no longer have the ability to view the billing information, add or delete users or change subscription levels.

Can I change, correct, or edit my account information?

The account owner and administrators have the ability to change the general account information.

How do I add or delete users?

Users can be deleted simply by selecting the Delete button next to their name on the user screen. This will not remove any licenses that they have assigned to them. Because the license itself won't be deleted, it can be assigned to someone else. However, the previous user's data (forms, timekeeping, etc.) will be lost if the user is deleted. If licenses are available, a user can be added by selecting Add from the Users Screen. If there are no licenses available, the account owner will need to contact their sales rep to purchase additional licenses.

How do I deactivate users?

Users can be deactivated through Administrative > Users. Click the Inactive selection under the user's name.

How do I know what modules to use?

During the sign-up process, an industry or vertical is selected and modules are suggested based on that industry. This gives new customers a place to start.

What are My Modules?

My Modules is the section of the application that contains the modules that you signed up for when you registered for Encore. Going forward, this area will show the modules that you have on your account.

How can I add a module?

Modules can be added from the Find Modules section of Administrative > Modules, provided you are within your module allotment for your subscription level. If more modules are needed and the subscription level needs to change to accommodate this, the account owner will need to contact your sales representative to increase your subscription level.

How do I edit a module?

Access the module from My Modules or Find Modules. Select the edit button. The form opens and you are able to add or delete fields that suit your business needs. You can rename a module as well, but if a module becomes renamed, your statistics for that module will begin at the time the name was changed.

FAQ

frequently asked questions

page.3

What is available on a Wireless Form?

Forms are designed to capture the metrics that are important to your business. Depending on subscription level, forms can also be edited to include any additional fields you may need that aren't already on the form.

What reports are available in Wireless Forms?

Reports available for Wireless Forms include: Entry Details and User Activity Summary.

What's the difference between running a report and scheduling a report?

Running a report creates a report on-demand. Scheduling a report means the report is set to automatically go out on a specific day with specific frequency. Your subscription level determines whether or not you'll ability to schedule reports.

What are entries?

Choose the Entries tab to view data entered into modules by users. Users are listed in grid format. Select the View button next to a user name to view all entries made in the module during the time period you selected. Note that the grid won't show any entries until you perform a search.

What is the Dispatching dashboard?

The Dispatching dashboard provides an overview of orders, workload, and status. See a breakdown of active orders, check the workload of orders due by day, and view the number of orders by status for each user. The time period defaults to This Week but can be changed to show Today, Yesterday, Last Week, This Month, or Last Month.

How do I create a new order?

From Dispatching > Orders, select New and fill out the order form.

Do I need to assign the new order at the time it is created?

Orders can be entered into the system and assigned at a later date.

Can I change, correct, or reassign an order?

From Dispatching > Orders, select Edit to the left of the order to make any changes and corrections. These options include assigning and reassigning to a different user, changing statuses, and cancelling an order.

How do I add clients?

Select Add New Client from the Clients tab. Enter the client information, and add a new client. Spreadsheets of clients can also be imported using File Import.

Can I add a client at the time I am creating an order?

Yes, you can! While creating the order, select New Client and fill out the information. The client will then be saved to your client list as you continue with the order.

FAQ

frequently asked questions

page.4

How do I create a new status or a new service?

From Administrative > My Modules > Dispatching, select Edit and then Module Settings. Select New Service Type or New Status Type to create new fields. Save the new fields, and they will then be available when filling out an order.

How does Messaging work?

Use Messaging to view and send messages to other application users on the web and mobile devices alike. Your application notifies you of new messages in two ways: the Messaging menu item displays the number of new messages in your inbox, and messages that you receive while you are working with the application will display briefly and disappear after a few seconds.

Can I message anyone?

With Messaging, you are only able to communicate with users on the account that are also using Messaging. This will not work as a text or email message to anyone who isn't using the application.

What are the Tracking dashboard(s)?

The dashboard(s) shows statistics on all tracked devices and vehicles. On the Summary Bar across the top, event information such as total trip time, total stops and total miles are displayed. Additionally, summary information is displayed below in panels. This Week is the default time period for the information shown on the dashboard. However, you can click the drop-down list at the top of the screen to choose another time period. Choose from: Today, Yesterday, This Week, Last Week, This Month and Last Month.

What is Live View?

In Live View, see near real-time information about your users and devices. You can see last locations, movement statuses, timekeeping statuses (if applicable), and the time elapsed since the last GPS update. Live View is in the user list panel, the search function, and the map.

What are Geofences?

Geofences are map area boundaries used to mark areas of interest, such as job sites, offices or employee no-entry/no-exit areas. Geofences can be created in either circle or polygon shapes, and are located under the Intelligent Tracking menu.

What kind of reports are available in Tracking?

Under Tracking > Reports, the available reports include: Start and End Time, Stops Time and Mileage, and Tracking Summary.

What information can I track in Timekeeping?

The Timekeeping dashboard provides at-a-glance information about numbers of hours worked by users in a chart-style format.

How long does Encore store my data?

Customer data is stored on the portal for a rolling one year period.