

Fastrax  ***Service Software Suite***

FASTRAX BASICS - A TRAINING GUIDE



Fastrax Basic Functionality
A Guide For Every User

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Fastrax© Basics



Hi, I am your training instructor from Ergos Software, Inc. This is the Fastrax Basics Training Manual. Remember that Fastrax is now your main portal into your working environment. This high-function software system provides endless resources to make your job easier. When your working day begins you will be connecting to Fastrax. Fastrax remains running throughout your working day, with the exception of logging off the system when you leave your desk (for security purposes). There are tools and procedures available to automate every employee, no matter your position. Remember that Ergos Software, Inc. has a live support team available to assist you with your Fastrax Software System. If at any time you have any questions or need any additional help with your Fastrax software package, just give me a call at 888-352-3529 or visit the Ergos Software website at www.ergos-software.com. Let's begin learning how to access and use your Fastrax Contractor's Software Suite.

Accessing Fastrax

Launching Fastrax

Double click on the Fastrax connection file 'Fastrax-(your company's name)' Located on your workstation desktop.

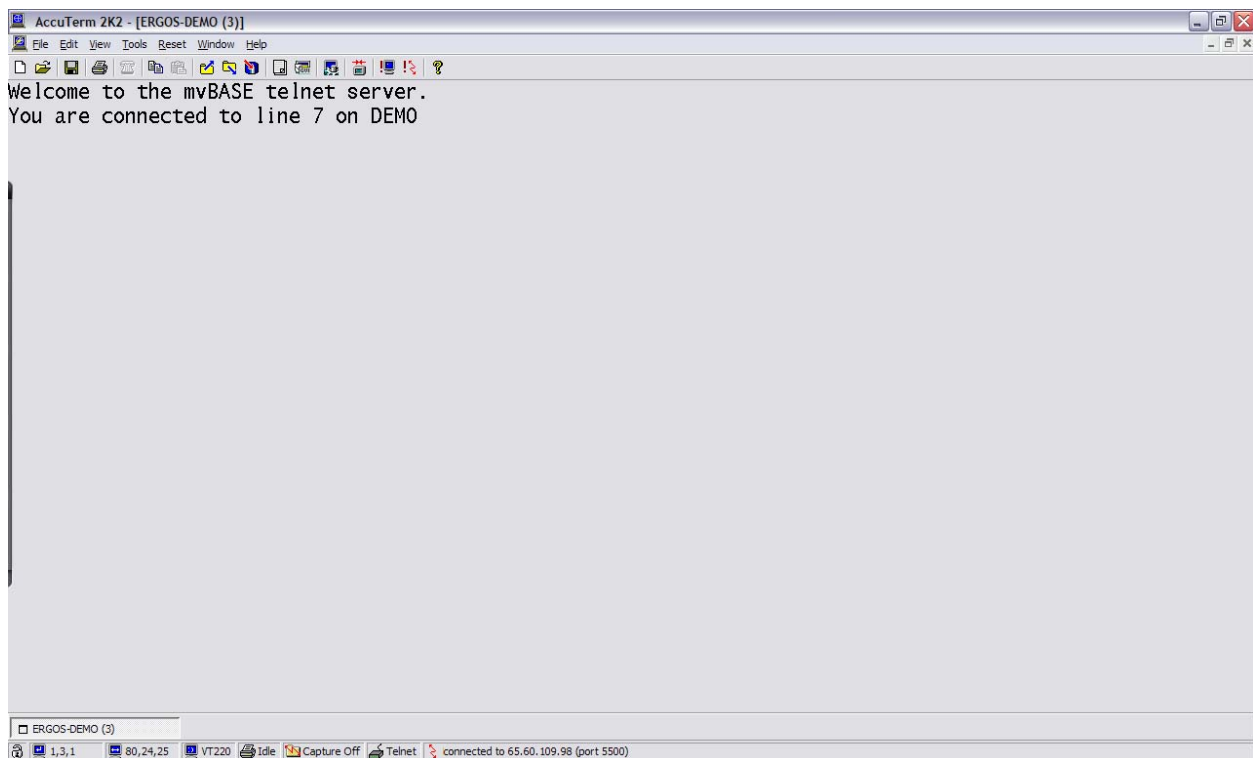
Example of file name= Fastrax - Test Co



*It's Simple!
Point, click, & begin*

If you cannot locate your connection file contact your system administrator or Ergos Software, Inc. - 888-352-3529.

You will know you are connected when you see a message similar to the following:

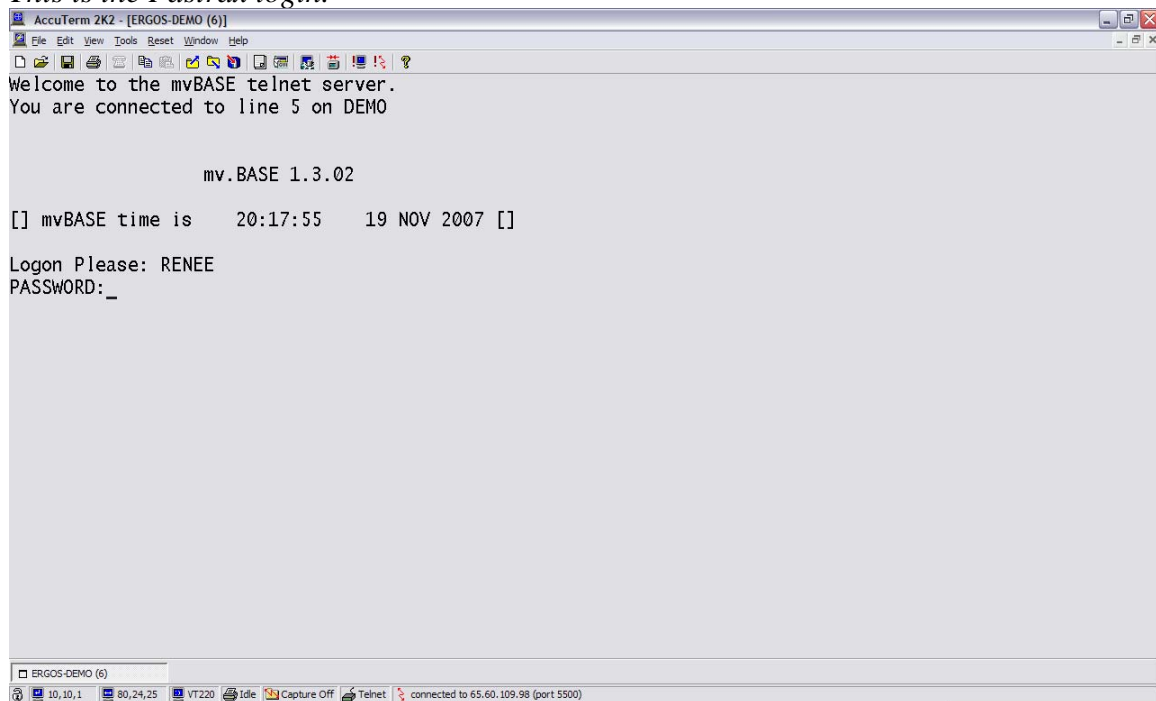


Press enter to access the Fastrax user log in page.

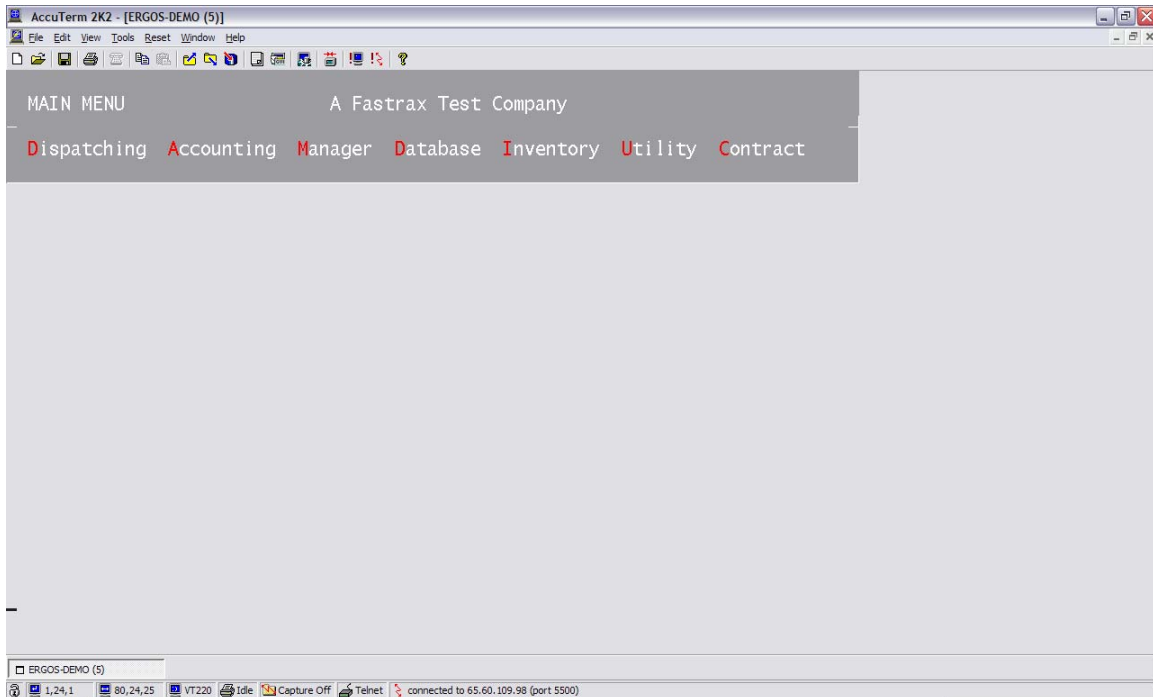
When Fastrax prompts, ‘Logon Please:’ enter your username (provided by management). All entries in Fastrax must be entered in uppercase; a lower case username will not be accepted.

At the ‘PASSWORD:’ prompt enter your password (provided by management). For security purposes neither a password nor a character count will appear while entering your password.

This is the Fastrax login.



Welcome to the Fastrax Main Menu

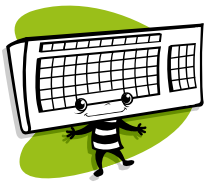


There are two basic methods that are used when accessing Fastrax menus and features:

1. Using access keys on your keyboard.
2. Point & click. (Using your mouse).

Combining these two methods presents a faster and more functional working environment. These methods are put in place to make your Fastrax System experience fast & friendly.

A computer mouse is a great tool; it gets you where you need to be fast & easy. Your keyboard is obviously a necessary tool as well – The fact is the keyboard can control the entire functionality of Fastrax. To best equip you for every function in Fastrax, this training guide will explain how to use your keyboard as your main method for entry. Don't worry; when we are done you will already know how to use all of the mouse functions... Point, click, it's easy!



Start thinking keys.

Fastrax Menu access: Using Arrow Keys

Left & Right Arrow Keys –

Are used to select Menus. (Example- Dispatching, Accounting, etc.)

Down Arrow Key –

Opens the menu you have selected (user access applies.)

Up & Down Arrow Keys –

Allow you to select items within a menu.

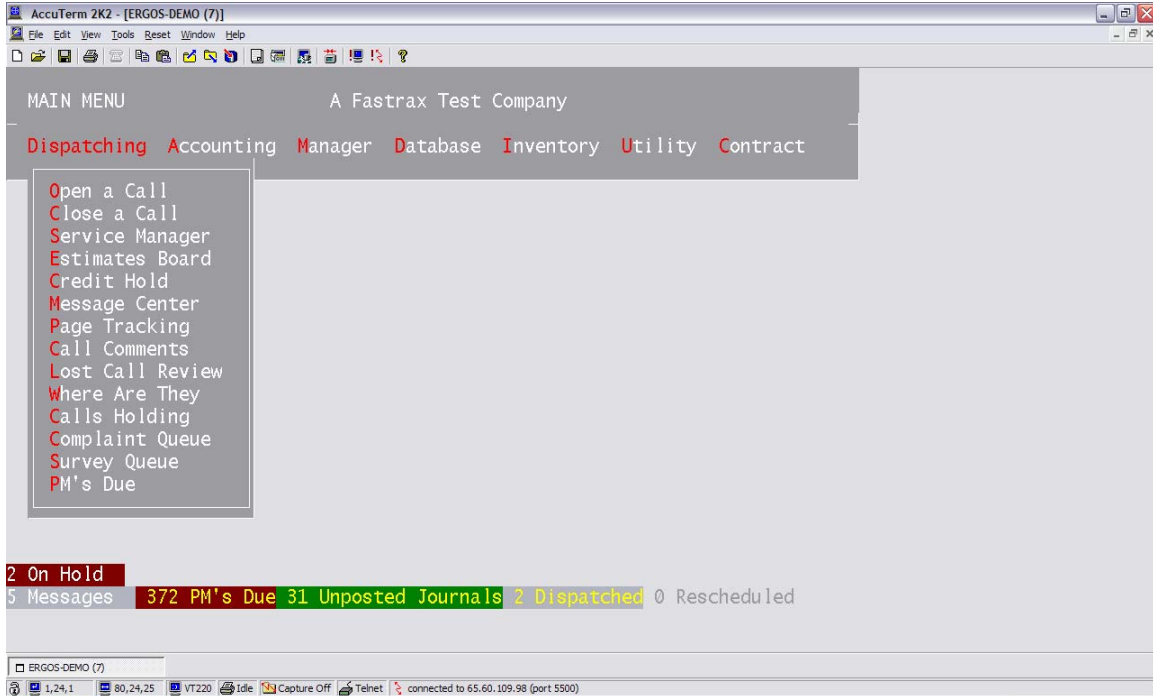
Enter Key –

Displays the item you have selected.

F3 Key –

Allows you to Exit menus & items you have opened.

This is the Fastrax Dispatch Menu.



Exercise: Access the Fastrax Menu which best applies to your job position.

Use your arrow keys and enter key to access the different menus.



Now that you know how to access the Fastrax menus and features, we are going to learn the basic functions that you will be performing to use these menus and features. We are going to use a simple starter procedure (opening a service call) to point out important system functions. This system procedure will allow us to review many of the uniform tools and options used in Fastrax. Once you learn how to perform these functions in the 'Open a Call' screen, you will be able to apply them in any procedure or screen in the system. Fastrax functions are basically the same throughout the software, by mastering the functionality in one screen you will be learning how to use every screen. Regardless of your company position the following will aid you in learning how to use Fastrax.

Fastrax System Functionality

Learning Basic System Functions

While Opening a Service Call

This training will progress step by step through the system procedure of logging a service call. During this procedure we will discuss & train many Fastrax system functions. Each system function will be reviewed thoroughly along with the steps necessary to advance us in logging a test service call.

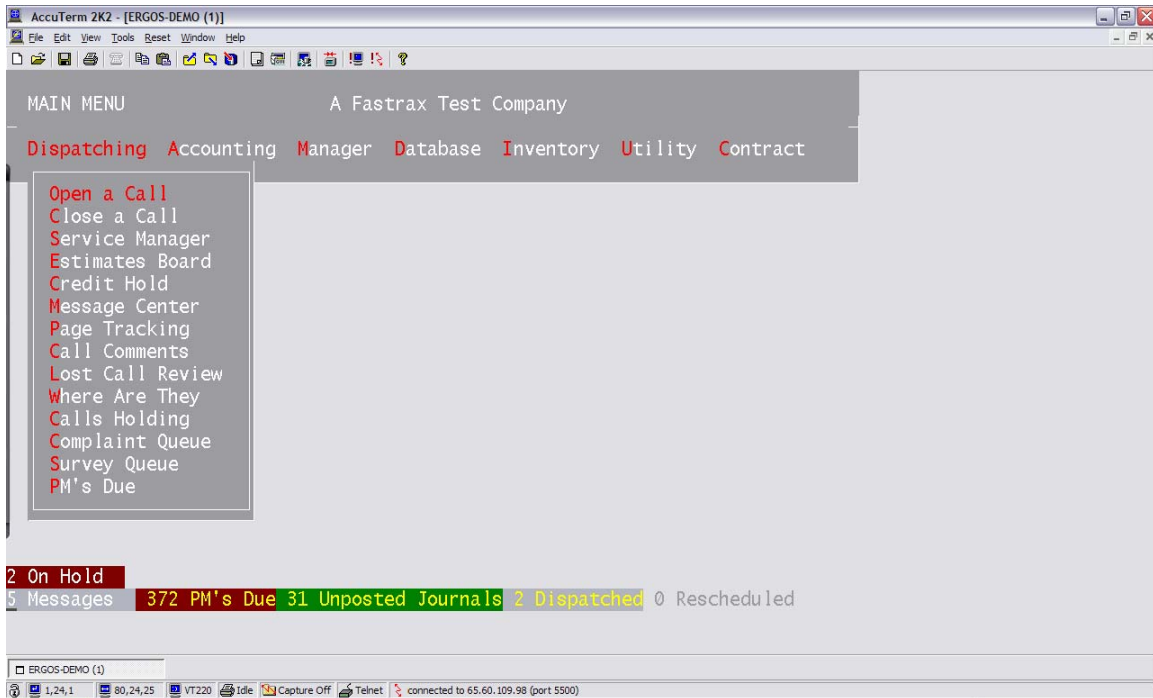
All information pertaining to opening a service call will display in RED

All Information pertaining to Fastrax Functions will display in BLACK

All text is intended to be read together.

Accessing Fastrax screens

Using your arrow keys highlight the 'Open a Call' screen and press Enter to select.



You will select all menu items in the same way.

Arrow Keys - to navigate

Enter Key- to open your selection

F3 Key- to exit out of a selection or menu

Some important keys you will need

F1 Key = Help

F2 Key = Search/List

F3 Key = Exit/Cancel

F11 Key = File/Save


Look to your Fastrax Instructions and buttons, located at the bottom of most screens.

Text Entry Point

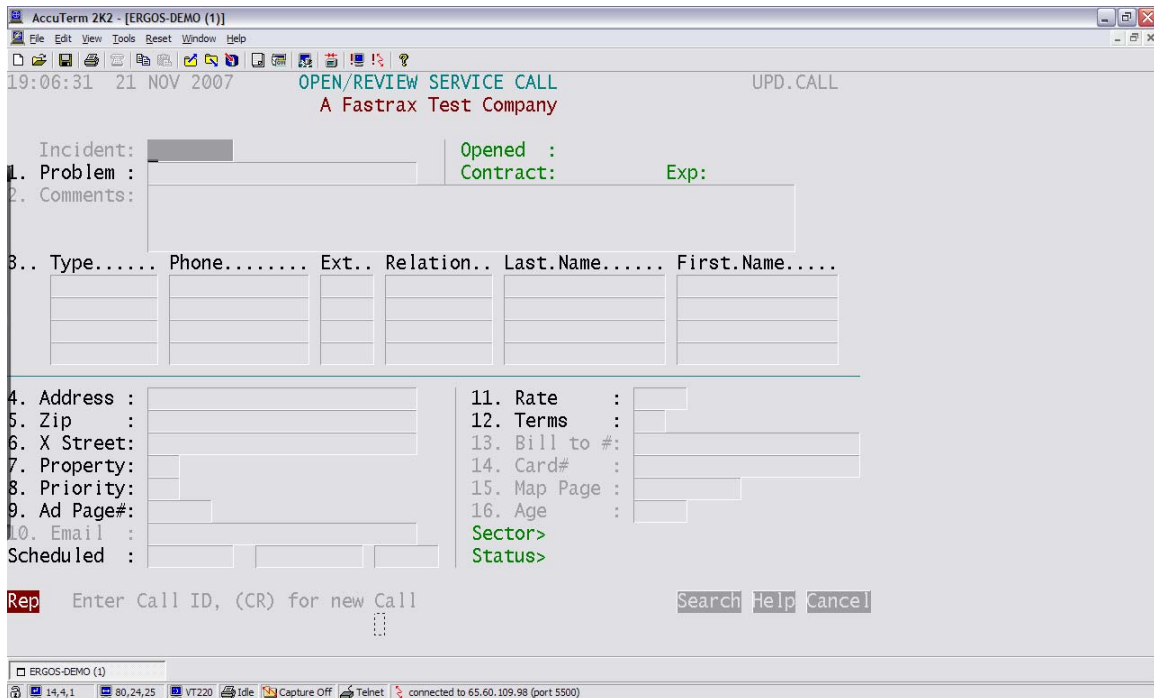
Notice that upon entry to the new screen your cursor will automatically position itself at the most appropriate **Text Entry Point**. This is the first area that your cursor places itself for text entry in a Fastrax screen. Essentially this is the area that you will begin typing.

Depending on what screen you are using, the 'text entry point' will reposition itself to the most valid cell. The entry point is often located at bottom of the screen by your options or at the top of the screen to enter an ID.



When you enter a new screen, look for this symbol  for your text entry point.

Example A: Here is the Text Entry Point for the Open a Call screen.



This particular entry point is the **ID** or **Filename** for your call **record**.

ID/Filename Field

(See example A)

You can tell that this is an **ID Field** because:

It is located at the top or **entry point** for the file that you are accessing.

It has no **sequence #**, unlike other updateable fields within the file.

It has a uniform name throughout the system that identifies your file.

At **ID Fields** you will have the following options available to you.

1. Enter any existing **ID #** to access an existing record.
2. Enter any text pertaining to an existing **record** to search for a record.
3. Enter a new record by following the 'Fastrax Instructions' (bottom).



It's Simple!

ID's are important; they are the name that each record stores by. You can't change IDs. ID Fields are used for accessing records, searching for records, & entering new records.



What is a record? A record is any file in Fastrax that is created, stored & updated. Some Examples of records- Service calls, Invoices, Timecards, Customers, Vendors, Purchase Orders, Customer Contracts. Every record that is in Fastrax has an ID number.

We will review these options further, in the following pages. First, let's review some other general functionality that is displayed on the Open a Call screen.

Fastrax Instructions & Options

Refer to 'Example A' and notice that in the Open A Call screen, when you are positioned at the Incident text entry point, a message & your options displays at the bottom of the screen. Depending on the text entry field you are in, the bottom instructions and Option buttons will change.

The Fastrax Instructions read; Enter Call ID, (CR) for new call.

Available options are; Search, Help, or Cancel.

REMINDER

*CR stands for Carriage Return, also known as your Return or Enter Key.



It's Simple!

Always look to the bottom of each screen for instructions and options.

Fastrax Help

Your Help button will display further assistance whenever necessary.

Help can also be accessed by pressing F1 at any text entry point.



It's Simple!

F1 = Help. Or click help.

Using the 'Incident:' ID Field:

Do you remember the three actions that you can take at ID Fields?

1. Enter an existing **ID #** to access a record.



2. Enter any text to search for existing **records**.



3. Enter a new record (steps vary see bottom of screen for directions)



Let's discuss and use each of these actions, focusing on the functionality of each.



1. Opening an Existing Record

Enter an existing ID # to access a record.

If you know the ID number for the record that you want to access, type it in the ID Field and press enter. Your record will open.

You can enter any existing **Incident #** to access an existing call record.

REMINDER

An ID number is the number that every record stores by. When you create a new record an ID will be automatically generated & can then be used to open the record at any time.



It's Simple!

If you know the identification number (ID#) for the record that you are trying to open, you can type it in to access the file directly.

An open record displayed in the Open a Call screen. The ID # or incident # is 711221.

AccuTerm 2K2 - [ERGOS-DEMO (2)]
13:32:56 22 NOV 2007 OPEN/REVIEW SERVICE CALL UPD. CALL
A Fastrax Test Company

Incident: 711221 S Opened : 11/22/07 13:18
1. Problem : PM MT PERFORM MAINTENANCE Contract: Exp:
2. Comments : THIS IS A TEST CALL FOR TRAINING PURPOSES.THIS SPACE SHOULD BE FILLED WITH NOTES PERTAINING TO A CUSTOMERS PROBLEM.

B.. Type.....	Phone.....	Ext..	Relation..	Last.Name.....	First.Name.....
1 Site phone	(888)352-3529		Owner	KINSLEY	DESIREE
2 Office	(562)696-5474		Owner	ERGOS SOFTWARE	
3 Fax	(562)696-5374		Owner	ERGOS SOFTWARE	

4. Address : 8229 LAS PASADAS DR. 11. Rate : 49.00
5. Zip : WHITTIER, CA 90605 12. Terms : V Visa
6. X Street: MAR VISTA 13. Bill to #: 57595 DESIREE KINSLEY
7. Property: SR SINGLE RESIDENCE 14. Card# :
8. Priority: 01 FLAT RATE 15. Map Page :
9. Ad Page#: TS No Book 16. Age :
10. Email : SUPPORT@ERGOS-SOFTWARE.CO Sector> 10 SERVICE AREA
Scheduled : 11/22/07 02:00 Status> Unassigned

Rep [Next] [Email] [Permit] [Print] [Equipment] [ViewSched] [Page Back] [File]
[Audit] [Open] [History] [Contract] [Schedule] [PgFoward] [Cancel]

ERGOS-DEMO (2)
5,24.1 80,24,25 VT220 Idle Capture Off Telnet connected to 65.60.109.98 (port 5500)

The Incident # is an identification number that Fastrax auto-generates for every service call record. Incident numbers cannot be changed.



2. Searching for an Existing Record

Enter any text to search for existing records.

To search for a record, enter any piece of text pertaining to the existing record in the ID Field. You can also use your F2 key to launch a search engine.

You can enter any text pertaining to an existing service call to search for that service call.

To perform a search, enter the text 'ERGOS' in the 'Incident:' field and press Enter.

This will search the database for calls with key word 'ERGOS' located anywhere in the file. Because this searching is so extensive you can search using any main information that you know is stored in a call record.

If more than one record matches your search criteria, a list of queries will appear. Simply select the record you are searching for by following the instructions located at the bottom of the page. Generally 'S' plus the sequence line number. Ex. S2. When your record is located it will display in the screen.

REMINDER

F3 to exit. F2 to search. F1 for help.



To search for an existing record, enter any pertaining text into the 'ID Field' & press enter to begin your search. You can also press F2 to launch a search engine page.



3. Creating a New Record

Following the instructions located at the bottom of the screen.

When you are creating a new record, simply follow the general instructions at the bottom of the screen. In most cases you will use your Enter Key (CR, Return Key) to bypass the ID field and begin entering all of the information necessary to build the record. Once all of the information is entered and you file the record, ID # will automatically generate.

From the 'Incident:' field, press 'enter' to begin creating a new record.

*Note CR = Enter Key = Return Key – All of these keys are the same key.

Depending on what type of record you are trying to create the steps will vary slightly

Notice the Fastrax instructions: “Enter Call ID, (CR) for new Call”

The screenshot shows a terminal window titled "AccuTerm 2K2 - [ERGOS-DEMO (2)]". The window displays a service call form with the following fields and labels:

- 19:59:47 24 NOV 2007
- OPEN/REVIEW SERVICE CALL
- UPD. CALL
- A Fastrax Test Company
- Incident: [Redacted]
- 1. Problem : [Redacted]
- 2. Comments: [Redacted]
- 3.. Type..... Phone..... Ext.. Relation.. Last.Name..... First.Name.....
- 4. Address : [Redacted]
- 5. Zip : [Redacted]
- 6. X Street: [Redacted]
- 7. Property: [Redacted]
- 8. Priority: [Redacted]
- 9. Ad Page#: [Redacted]
- 10. Email : [Redacted]
- Scheduled : [Redacted]
- 11. Rate : [Redacted]
- 12. Terms : [Redacted]
- 13. Bill to #: [Redacted]
- 14. Card# : [Redacted]
- 15. Map Page : [Redacted]
- 16. Age : [Redacted]
- Sector>
- Status>

At the bottom of the form, there is a red "Rep" icon followed by the text "Enter Call ID, (CR) for new Call". To the right of this text are three buttons: "Search", "Help", and "Cancel".

Sequence #s & Options

Notice from the last screenshot that most text entry fields have a number displayed before them. These numbers are called ‘Sequence #’s’. These numbers help identify each field and provide an easy access option.

**Remember F3 is your Exit key.*

When your cursor is at any text entry field, you can press your F3 key once to exit out of that field. When you press F3 from a text field your cursor will move to the bottom of the screen and User Options will appear.

When your cursor is at the bottom User Options you can enter any sequence # displayed on the screen to jump to that field (when the field applies).



It's Simple!

If you press F3 once from a screen, your cursor will return to the bottom screen options. From the bottom screen options you can enter any sequence number to access a cell, or click on a user option button.

Press F3 once to 'Exit' the 'Problem:' text entry field. Now you will notice that your cursor is positioned at the bottom of the screen and that you have a display of options. Take a look at the options now displayed at the bottom of the screen. Now enter the Sequence # for the problem code field to continue entering our 'Test Call'. When your cursor is positioned at the bottom of the screen enter '1' to return to the Problem Field.

Your Open a Call screen should look similar to this. Notice the Sequence #'s throughout the screen & the User Options located at the bottom of the screen.

AccuTerm 2K2 - [ERGOS-DEMO (1)]

09:13:33 26 NOV 2007 OPEN/REVIEW SERVICE CALL UPD.CALL
A Fastrax Test Company

Incident: S Opened : 11/26/07 09:12
1. Problem : Contract: Exp:
2. Comments:

3.. Type.....	Phone.....	Ext..	Relation..	Last.Name.....	First.Name.....

4. Address : 11. Rate : 0.00
5. Zip : 12. Terms : COD
6. X Street: 13. Bill to #:
7. Property: 14. Card# :
8. Priority: 15. Map Page :
9. Ad Page#: 16. Age :
10. Email : Sector>
Scheduled : Status> Unassigned

Rep Next Email Permit Print Equipment ViewSched Page Back File
Audit Open History Contract Schedule PgForward Cancel

ERGOS-DEMO (1)
6,24,1 80,24,25 VT220 Idle Capture Off Telnet connected to 65.60.109.98 (port 5500)



If you are creating a new record, generally you will press enter to skip the 'ID Field' & begin entering the data within the record. Upon filing your record ID # will automatically generate. The Fastrax Instructions will always explain how to enter a new record for each screen you are in.



Using F2 for Searching & Option Lists

Working in the Incident & Problem Fields

In most text entry fields your F2 key acts as a search engine. You will know this option is available if you see a search button appear when you enter into the field. When you press your F2 button to perform a search, one of two things will occur (whichever applies for the cell you are working in.)

1. A search page will appear prompting you to enter text to search for.
2. A list of available options will appear for you to select your entry from a list of options.

When a search page appears type in a key word (or a string of key words) that is relevant to the call you are searching for and press enter. When you locate your selection, follow the instructions at the bottom of the screen to open your selection.

Example- Generally this would be ‘S5’ for Sequence 5.

When an F2 list appears simply use your arrow keys to make your selection, or point and click to select. Some F2 lists have main category lists- which means that one list could lead you to another list- just continue clicking the most applicable option until your selection is complete.

REMINDER

You should remember our earlier review of F2 from ‘Searching for an existing record’ (in the ‘Incident’ field). Within that lesson we used F2 key to launch a search page & to search for “ERGOS”.

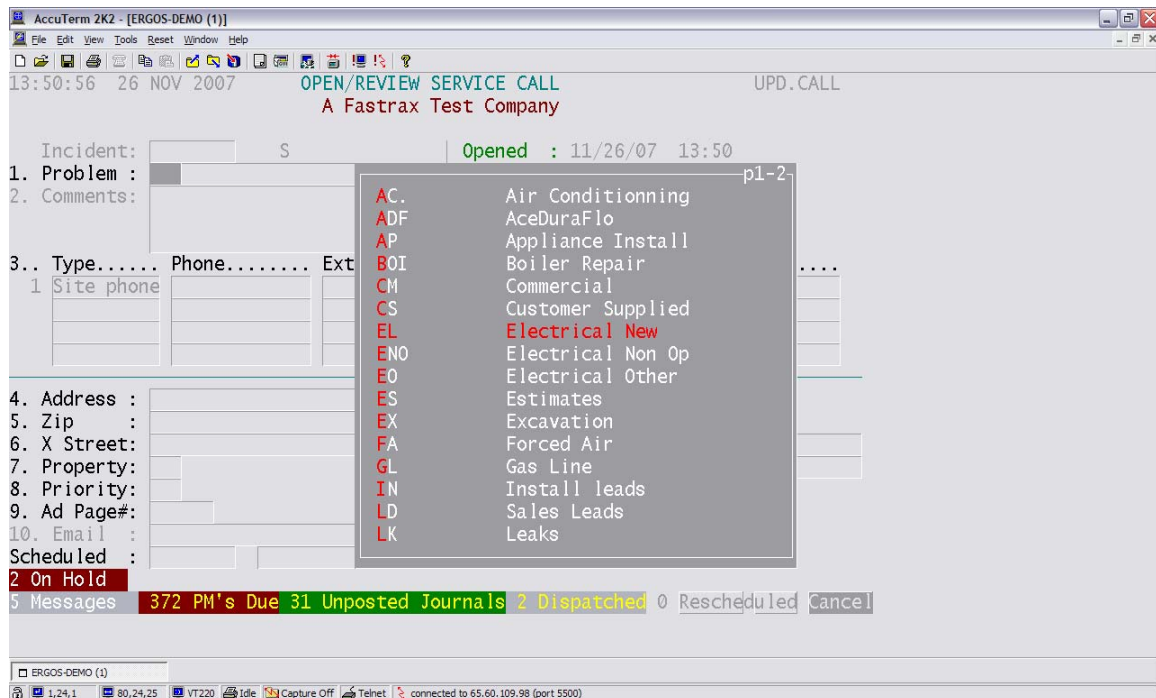
Using the ‘Problem’ field we will review a great example of the F2 option list function.

From the text field labeled ‘1. Problem’, press F2 to display your options list.

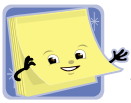
The first list that pops up is an example of a category list. When you make a selection from a category list, a new list pops up containing codes within the category you selected.

Select a ‘Problem Category’ from the list by using your arrow keys or point & click.

The Problem Category screen should look similar to this:



After you have selected a Problem Category, a new list will appear containing problem codes to be selected. Select the problem that your TEST customer is calling about. Once you have selected a Problem Code the Options List will close.



You have now attached the most valid problem code to the customer's service call. Capturing the customer's problem information first, gets the customer's issues off their mind & makes for a more pleasant 'rest of the conversation'.

Pop-Up Text Entry Screen

Entering Service Call Comments (2. Comments)

This is the 'Call Comments' pop up screen. .

AccuTerm 2K2 - [ERGOS-DEMO (1)]

File Edit View Tools Reset Window Help

15:15:41 26 NOV 2007 OPEN/REVIEW SERVICE CALL UPD.CALL
A Fastrax Test Company

Incident: S Opened : 11/26/07 13:50

1. Problem :
2. Comments: Ins File Exit PgFwd PgBack

3.. Type.....
1 Site phon

4. Address :
5. Zip :
6. X Street:
7. Property:
8. Priority:
9. Ad Page#:
10. Email :
Scheduled :

Press <file> to save or <exit> to quit

ERGOS-DEMO (1)

16,8,1 80,24,25 VT220 Idle Capture Off Telnet connected to 65.60.109.98 (port 5500)

Some text fields that require a larger input area will pop a screen within the window for you to view or update those fields entirely.

As soon as you enter into the comments field, a larger box for editing the comments appears. Enter comments about your test customer's Problem. (Example- severity, location, material.)Once all of your comments have been entered the comments window will need to be filed or saved.

Filing or Saving

In Fastrax anytime you want to save your work press F11 or click File.

If additional text entry screens pop-up while you are working each screen must be filed or exited (F3) before Fastrax will allow you to continue.

Press F11 to File your 'Comments'. (Or you can click 'File')



If a box pops up for additional entry, it must be filed (F11, Click File) to save your changes and return to your main entry screen.

After filing the call comments, your cursor will be routed to this position.

AccuTerm 2K2 - [ERGOS-DEMO (1)]

17:38:49 26 NOV 2007 OPEN/REVIEW SERVICE CALL UPD.CALL
A Fastrax Test Company

Incident: S Opened : 11/26/07 13:50
1. Problem : EW EL Energy Wise Contract: Exp:
2. Comments: THIS IS A TEST CALL. THIS IS THE AREA THAT YOU WOULD ENTER
COMMENTS PERTAINING TO THE CUSTOMERS PROBLEM OR CALL.
CALL.

3.. Type..... Phone..... Ext.. Relation.. Last.Name..... First.Name.....

1	Site phone				

4. Address :
5. Zip :
6. X Street:
7. Property:
8. Priority:
9. Ad Page#:
10. Email :
Scheduled : 02:00

11. Rate : 0.00
12. Terms : COD
13. Bill to #:
14. Card# :
15. Map Page :
16. Age :
Sector>
Status> Unassigned

Rep Enter Phone Number Help Cancel

ERGOS-DEMO (1)

16,10,1 80,24,25 VT220 Idle Capture Off Telnet connected to 65.60.109.98 (port 5500)



What is a field? A field, also known as a cell, is an entry box designated to hold a specific piece of information. Basically a field is anywhere that you can input data into the system.

Populated Text Fields & S-Sequence #

Working in Sequence 3 – Customer Phone #s

Populated Text Fields

If text auto populates in a field it is either the default entry or a mandatory entry.

In the case of the phone number type - '1 Site phone', this text is a mandatory entry.

The first phone # entered must be the physical job site phone # or the best # to substitute.
This mandatory Phone # Type auto-populates in the first phone number field.

S-Sequence #

We discussed Sequence numbers earlier and how you are able to jump directly to each field by entering the sequence number at the input line. In the case that there is an additional set of sequence numbers within a sequence number, we refer to these as S-Sequence #s (short for sequence, sequence- creative huh?) you can access an S sequence field by entering S plus the sequence number from the bottom input. (ex. = S2)



It's Simple!

If the sequence number that you are trying to enter is displayed more than once on a page, then a 's-sequence' numbers exists on your page. S-sequence numbers are numbers listing items within a sequence. To access s-sequence numbers enter S plus the sequence number. Example - S2.

Press your F3 key once to see an example of S-Sequence #

Now that your cursor is at the bottom of the screen, enter S1 to jump back to the first s-sequence listed under field 3- Phone #s . Use the following instructions to enter phone numbers on your test call:

TYPE- Press F2 for an options list, it is mandatory the first phone number entry be for 'Site Phone'.

PHONE- Enter the phone # in straight text (ex. 8883523529) the software will automatically format your entry.

Fastrax Auto formats many text entry fields including dollars, dates, phone numbers, etc.

EXT- Enter the extension # or leave this field blank if it is not applicable.

RELATION- Press F2 to select a relation code from the list.

NAME- Enter the last name and then enter the first name for the customer.

When you press enter, the system will take you to the next s-sequence line to enter another phone number. If you want to enter a phone number press F2 to select the type of phone number you are logging & then complete the following information. If you do not want to enter another phone number, press enter to skip to the Address Field.

See the screen shot on the following page for an example of phone numbers entered in the 'Open a Call' screen.

AccuTerm 2K2 - [ERGOS-DEMO (1)]

23:59:54 26 NOV 2007 OPEN/REVIEW SERVICE CALL UPD.CALL
A Fastrax Test Company

Incident: S Opened : 11/26/07 23:58
1. Problem : PM MT PERFORM MAINTENANCE Contract: Exp:
2. Comments:

3.. Type.....	Phone.....	Ext..	Relation..	Last.Name.....	First.Name.....
1 Site phone	(562) 696-5374	205	Manager	KINSLEY	DESIREE
2 Office	(888) 352-3529		Manager	KINSLEY	DESIREE
4 Fax	(562) 696-5474		Manager	KINSLEY	DESIREE

4. Address :
5. Zip : DAYTON, NJ 08810
6. X Street:
7. Property: SR SINGLE RESIDENCE
8. Priority: 01 FLAT RATE
9. Ad Page#:
10. Email :
Scheduled : 11/26/07 02:00

11. Rate : 0.00
12. Terms : COD
13. Bill to #:
14. Card# :
15. Map Page :
16. Age :
Sector> 10 SERVICE AREA
Status> Unassigned

Rep Enter Phone type Search Help Cancel

ERGOS-DEMO (1)
5.13.1 90.24.25 VT220 Idle Capture Off Telnet connected to 65.60.109.98 (port 5500)



Automatic Search Engines

Some fields in Fastrax will perform an automatic search using the text you enter in the field. Fastrax does this within certain fields to ensure that the information does not already exist in the system. This action is necessary to ensure that you do not end up with duplicate files.

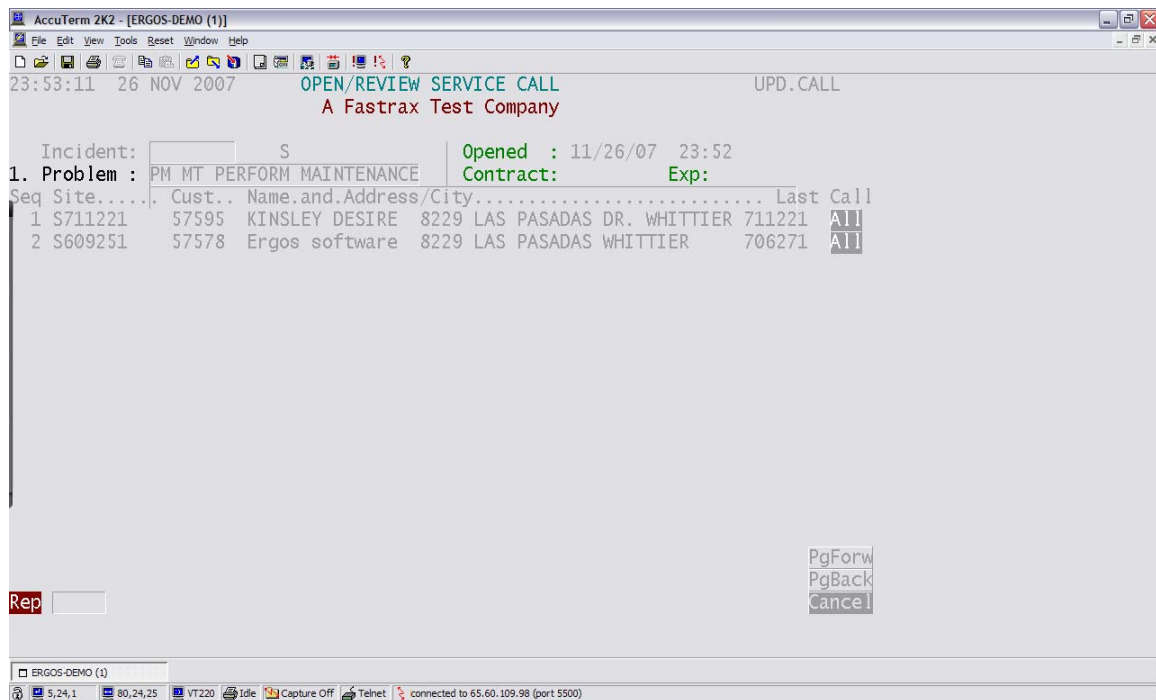
In the Open a Call screen both the Phone number & address text fields perform an automatic search using the text that you input.

If existing service calls are found a search list will appear for you to choose the call that fits the description for the call you are trying to open. You must make sure that if you select an item from the list, it is for the current existing customer file.

If none of the items in the list seem to match for the call that you are trying to enter, press F3 to exit the search screen and return to the call you were opening.

This is a Fastrax search screen.

Enter S2 to select line 2 or press your F3 key to return to the call you were opening.



Basic Text Entry Fields

Entering address information

Enter the address for the job location of your test customer.

REMINDER

All entries in Fastrax are inputted using upper case text.

Now enter the zip code for your test customer, the city and state will auto-complete.

Now enter a cross street for your customer, this is a mandatory entry so if you do not have a cross street you must enter NA.

Auto Complete

Auto complete automatically fills in additional text relevant to an entry you've made.

AccuTerm 2K2 - [ERGOS-DEMO (1)]

09:06:47 27 NOV 2007 OPEN/REVIEW SERVICE CALL UPD.CALL
A Fastrax Test Company

Incident: S | Opened : 11/27/07 09:04
1. Problem : ACC AC. AC Check | Contract: | Exp:
2. Comments : THIS IS A TEST

3.. Type.....	Phone.....	Ext..	Relation..	Last.Name.....	First.Name.....
1 Site phone	(888)352-3529		Manager	KINSLEY	DESIREE
2 Office	(562)696-5474		Manager	KINSLEY	DESIREE
3 Fax	(562)696-5374		Manager	KINSLEY	DESIREE

4. Address : 8229 LAS PASADAS DR | 11. Rate : 0.00
5. Zip : 90605 | 12. Terms : COD
6. X Street: | 13. Bill to #:
7. Property: SR SINGLE RESIDENCE | 14. Card# :
8. Priority: 01 FLAT RATE | 15. Map Page :
9. Ad Page#: | 16. Age :
10. Email : | Sector> 10 SERVICE AREA
Scheduled : 11/27/07 | 01:00 | Status> Unassigned

Rep Enter the Customer's Zip Search Help Cancel

ERGOS-DEMO (3)

14,16,1 80,24,25 VT220 Ide Capture Off Telnet connected to 65.60.109.98 (port 5500)

Fastrax System Codes

A code is a pre-built selection available for your use in Fastrax. Codes are the items that appear in a 'F2 Option List'. Most codes are customizable and can be updated by administration. Fields that auto complete can also be codes or information taken from a code file.

***If at anytime when you are working in the system, you feel that the right code is not listed or if any auto-complete information seems to be coming up wrong contact your system administrator.**

Within the Open a Call screen there are many good examples of different types of codes:

Field 3 – Phone number information.

This field contains system codes under 'Phone Type' & 'Phone Relation' selected by using your F2 list.

Field 5 – Zip

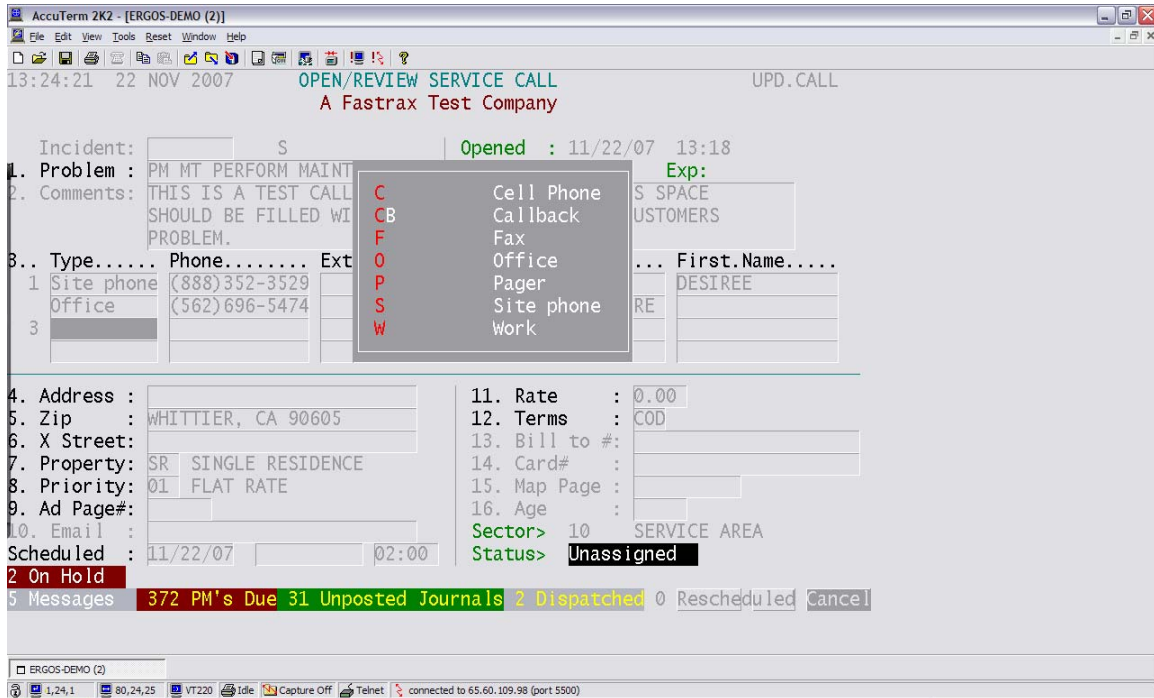
This field is an example of an auto complete system code. When you enter a zip code, the system automatically finds that code and inserts the city & state.

If you enter a zip code that does not exist, a new screen will open to create that zip code.

Enter the necessary information for the zip code & F11 to file the zip code.

Other codes on the Open a Call screen include; 'Field 7. Property', 'Field 8. Priority', 'Field 12. Terms' and '9.Ad Page #' (Also the display only fields Sector & Status).

This is a codes list (or options list), codes can be customized. Press F2 to view codes.



From the Property field press F2 to display your options list. Select the code that best fits the property type for your test service call. (ex. Single Residence, Business, Condo.)

From the Priority field press F2 to display your options list. Select the code that best fits the priority type for your test service call. (Ex. Emergency, Flat Rate, Warranty Work.)

From the Ad Page # field you have an example of an auto-complete code & an option list code.

If your test customer heard of your company from the yellow pages then you can enter the page number of the AD. When you enter a valid AD page # into the system, the yellow book name will auto complete in the space to the right.

If your test customer heard of your company from other than a yellow page source then you can press F2 for a list of other marketing Advertisements that your company uses.

Entry Not Required

Entering Customer's Email Address

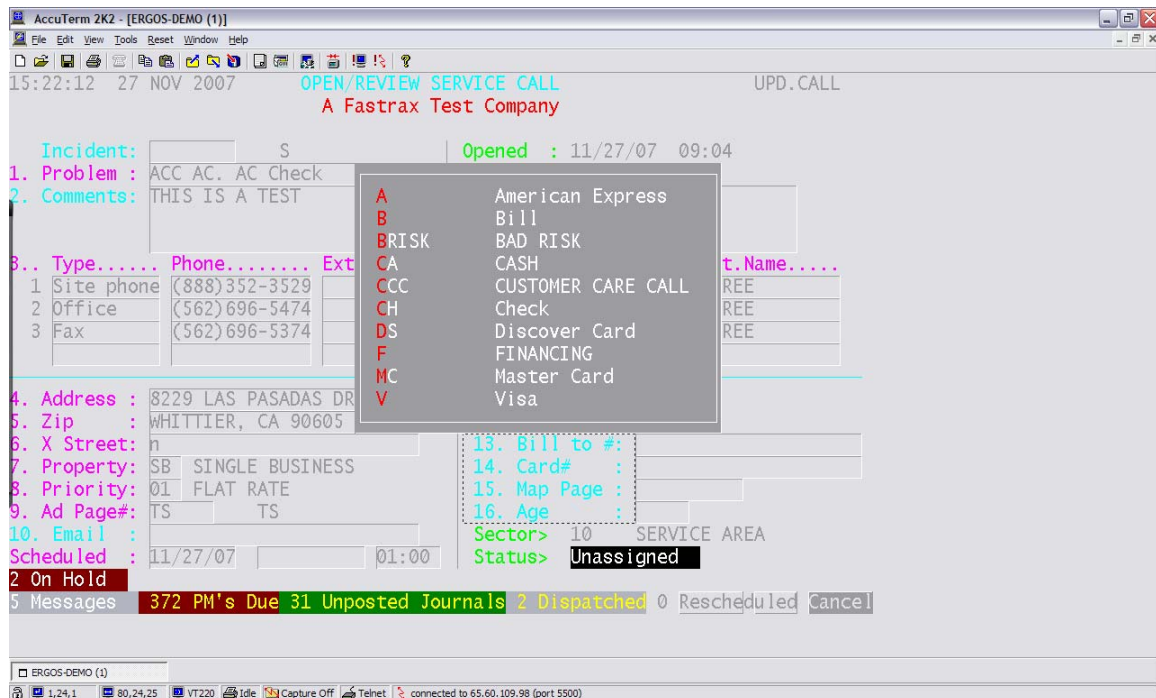
When you are entering text in Fastrax not all fields require an entry. Fields that do not require text entry are generally display in a lighter color. Mandatory fields display in a bolder color, depending in what screen you are in. Even though some fields do not require entry, all fields present should be used if applicable.

In the 'Email' field enter a valid email address. (ex. email@network.com)

Always try to capture an email address; it is a great way to communicate with your customers.

At the 'Rate' field press enter to confirm the rate listed (this field auto-completes based on the priority type selected)

At the 'Terms' field press F2 to select a valid payment method (only accepted payment methods should display in the list.)



Some fields that do not require text entry become mandatory depending on the options that you choose. So when a field is colored as a non-mandatory field it simply means that this field will not always need to be completed.

If the billing terms code is 'bill' (ex. Invoiced with 30 days to pay) then you should enter the customer number to be billed in the 'Bill to #' field.

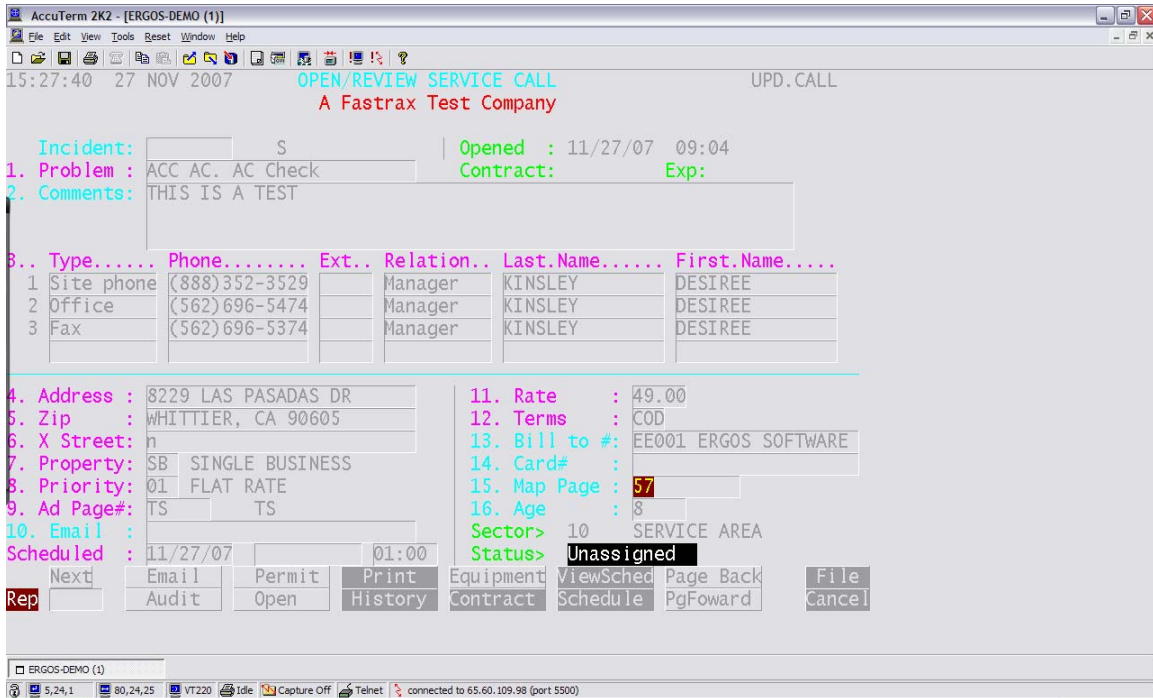
If you do not know the customer number you can F2 to search for the existing customer.

If a 'Bill-To' number does not exist then you can simply leave the Bill to # field blank. When you file your test call a new customer bill to # will automatically generate using the information in the call.

If you selected terms of Credit and it is your company policy to capture a customer credit card # then you can enter this number in field 14 – Card#.

If you use map-books in the office and in the field, you can enter the map page number that your technician can reference to help him locate this service call.

If your test call is involving servicing or replacing existing equipment (ex. AC, Heater) you can enter how old the equipment is in years.



When you press enter after completing all of the text fields on a screen, your cursor will return to the bottom of the screen & your user options will display.

Display Only Fields

You may have noticed that some fields were skipped altogether.

Fields that do not have a text window around the displayed text are not editable. The information in these fields is provided only as a reference.

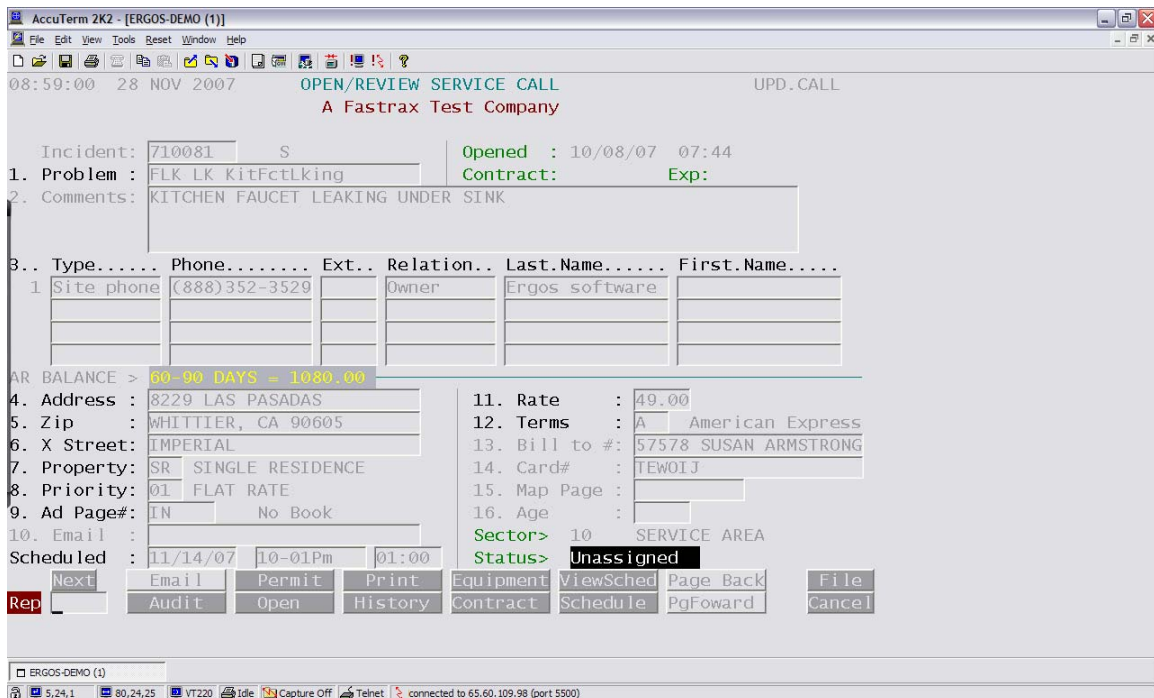
You will notice that the Customer contract information will be available in the upper right hand corner when applicable. The sector & status fields in the lower right hand corner provide valuable area and job completion information.

Did you notice that the field labeled 'Scheduled' has not been accessed yet? To enter a schedule date & time for your test call you simply click in the schedule box or from your bottom options click Schedule (or enter fast key 'S' from the bottom). Scheduling the call should not be done until all of the customer's information has all been captured.

Now that you have entered through all of the text fields in the 'Open a Call' screen and your cursor is positioned back at the bottom options, let's consider some of these options & their functionality.

System Options & Buttons

Reviewed using the Open a Call screen options.



Main Buttons

When you are in a Fastrax screen your main buttons will be located at the bottom right and directly over your bottom input field. These main buttons are File, Cancel, Next.

Often in this same area when applicable you will see additional buttons of Search and Help.

File Button = Saves your record or changes made to your record. (same as F11)

Cancel Button = Exits the screen without saving. (Same as F3)

Next Button = Clears your screen for you to open another record.

Search Button = opens an options list or a search page. (Same as F2)

Help Button = displays available help. (Same as F1)

Other Buttons

The other buttons displayed pertain to the action that you are performing in the system.

Most of your bottom buttons will change based on the screen you are working in.

Some buttons that you will see often include: Audit & Print

Audit Button- This button displays which user has updated the record that you are looking at & what actions or changes have been made against a record.

Print Button- Your Print button obviously prints, but what it prints will vary by screen.

The additional buttons on your screen generally make up actions that can be performed for the record that you are viewing. (These will be reviewed more specifically in each users training manual.)

Using Buttons

You can choose to use the buttons at the bottom of the screen in two ways;

1. Point & click
2. Using the first letter as a Hot Key.

(Ex. To print, at the bottom input line type P and press enter.)

Click your 'Audit Button' & view the audit trail screen that pops up. Press F3 to exit from the audit trail screen and return to your test call in the 'Open a Call' screen. Now from the 'Open a Call' screen press F11 or click 'File' to save your record.

Fast Keys

All of the user options located at the bottom of your Fastrax screen can be accessed by using the first letter of the option name.

Ex. To select the Audit option you can enter 'A' at the bottom input field instead of clicking on the Audit Button.

Fast Keys also work when you are selecting a code from an option list or when you are selecting screens from a Fastrax Menu. Ex. You can enter S from when the Dispatch menu is open to jump to the Service Manager Board.

Now that your new call record has been created, let's log out of Fastrax.

Logging off of Fastrax

Properly logging out of the system.

Just like any program that requires you to enter a user name and password, it is always necessary that you disconnect your user when you are done working. To log off of Fastrax press F3 until you have exited out of all the Menus. When you arrive at the input line (:) type OFF, this will logoff your user. Then click the X to close out the screen.

Since connectivity to Fastrax is limited by the number of users accessing the software, it is very important for you to make sure that the Fastrax window (Accuterm interface) is closed after logging off.

You should never close (X) your Fastrax session without first logging off the system.

A logged on session of Fastrax should never be left unattended by any employee.

When you leave your computer you should log off of Fastrax first.

For security purposes if your user is left inactive for 15 minutes you will be automatically disconnected from Fastrax.



Congratulations! Your test service call has now been entered into the system & we have reviewed the different functions in Fastrax. You should now understand how to navigate through the menus, select menu items, enter a record into the system, perform a search, access fields using sequence #s or buttons, access help & instructions, find user options & buttons, & so much more. By learning these functions you can work in any menu items you have user access to. If you get stuck you can use this manual and your Fastrax on screen instructions to help you. If you do not remember some of the things we reviewed, don't worry! The more you begin using the functions the more they will make sense to you. Also everything that we have learned will be reviewed in full. I will be providing a 'Fastrax Fact Sheet' to assist you. Thanks for paying close attention, let's review.

The Review

*Launching Fastrax- Double click the file on the desktop.

*Logging into Fastrax- Enter your username and password in all caps.

Fastrax Main Menu Access

You will select all menu items in the same way.

Arrow Keys to navigate

Enter Key- to open your selection

F3 Key- to exit out of a selection or menu

Some important keys you will need

F1 Key = Help

F2 Key = Search/List

F3 Key = Exit/Cancel

F11 Key = File/Save

Look to your Fastrax Instructions and buttons, located at the bottom of most screens.

**When you enter a new screen, look for this symbol _ for your text entry point.*

**The ID Field can be used to search, open, or create a new record.*

**The ID Field is generally the first field or 'text entry point' for each record.*

**Fastrax Instructions and Options can be found at the bottom of most screens.*

**For additional help in Fastrax, press F1 or click Help.*

**To open an existing record, enter the ID# for the record in the ID Field.*

**To Search for an existing record, press F2 or type the text you wish to search for directly into the ID Field.*

**To create a new record, first look to the instructions at the bottom of the screen.*

**Generally you will press enter to skip the ID Field and begin entering the rest of the information for the record.*

**You can access your user options in a screen by pressing F3 once; this will exit you out of the text field and place your cursor at the bottom of the screen with your options.*

**You can access any 'text entry field' by entering the sequence number listed before the field name.*

*You can press your F2 button to launch a search from any screen that has a search button. F2 will return either a search screen or an options list.

*Sometimes when a larger entry space is required for a text field a new, pop-up window will display. After making your entries in any pop-up screen you must 'file' your changes.

***To 'file' or save your changes press F11 or click File.**

*You can access text fields with sequence numbers that are sub categorized below other sequence numbers, by entering an S plus the sequence number. Ex. S2.

*You can use the options located at the bottom of each screen by clicking the option, or by entering the first letter for the option you choose.

***To log off of Fastrax press F3 until you have exited out of all the Menus. When you arrive and the input line (:) type OFF, this will logoff your user. Then click the X to close out the screen.**

Fastrax Fact Sheet

System Navigation and User Keys

Click the Fastrax File located on your desktop to begin. Then enter your user name and password. In Fastrax you work with your caps lock key on, all text is entered in upper case.

You will select all menu items in the same way.

Arrow Keys to navigate

Enter Key- to open your selection

F3 Key- to exit out of a selection or menu

Some important keys you will need include:

F1 Key = Help

F2 Key = Search/List

F3 Key = Exit/Cancel

F11 Key = File/Save

Fastrax Instructions and buttons are usually located at the bottom of each screen.

Sequence #s

You can access any 'text entry field' by entering the sequence number listed before the field name.

You can access text fields with sequence numbers that are sub categorized below other sequence numbers, by entering an S plus the sequence number. Ex. S2.

Fast Keys

All of the user options located at the bottom of your Fastrax screen can be accessed by using the first letter of the option name.

Ex. To select the Audit option you can enter 'A' at the bottom input field instead of clicking on the Audit Button.

Fast Keys also work when you are selecting a code from an option list or when you are selecting screens from a Fastrax Menu. Ex. You can enter S from when the Dispatch menu is open to jump to the Service Manager Board.

Logging off

Press F3 until you have exited out of all the Menus. When you arrive and the input line (:) type OFF, this will logoff your user. Then click the X to close out the screen. If you want to return to the main menu from the input type MM.

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