Fastrax- Tech

The following instructions are a step by step visual guide on how to complete a call in the Fastrax Tech version.

Support

- At the top of every window in the Fastrax App there is a support button. This button will take a snap shot of your current screen. This snapshot gets sent back to the office and allows the office to see what you are looking at.

Actions

- View Call- When a call is highlighted you can click View Call to see the information about this call and any history on that calls particular site. You can also view equipment attached to the site, take pictures, as well as upload pictures from the camera roll.
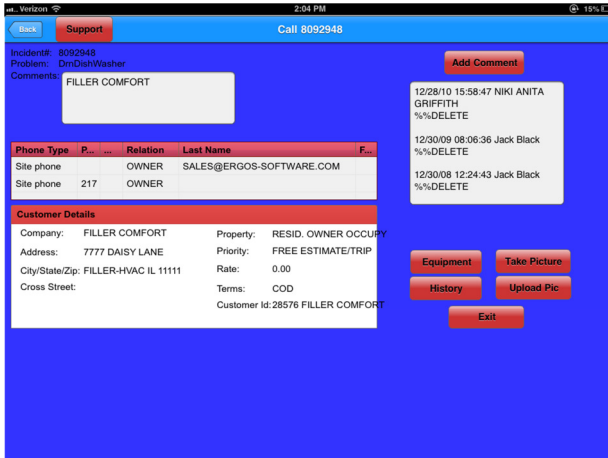
- Purchase Order- This function is used to create Purchase Orders for jobs you are assigned to, this is **NOT** to be used to create truck stock Purchase Orders. To create a purchase order. Select the call you would like to attach it to, click the purchase order button, enter the vendor number if you know it otherwise you can search for a vendor by entering the vendor name and clicking done on the Ipad keyboard. Once the vendor is selected you may enter parts by clicking the Parts button and Add Part. After this is completed, click the Save button will save the Purchase Order and give you a purchase order number at the top of the screen.
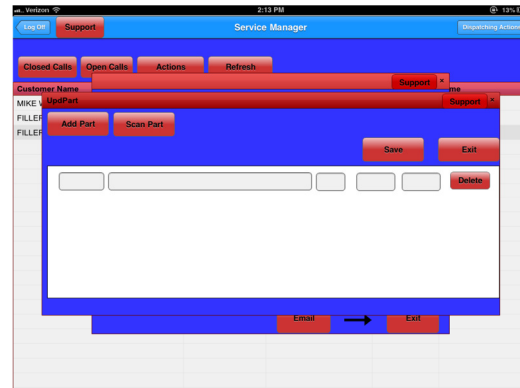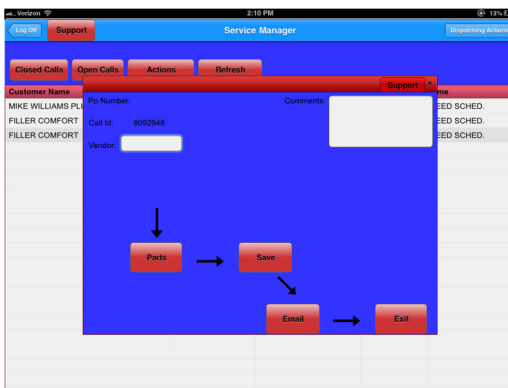
- History- The history function on the actions menu is the same as viewing it in the View Call option. If you click on Docs, you will be allowed to view the signed invoice of the selected call or view pictures that were taken on the call.
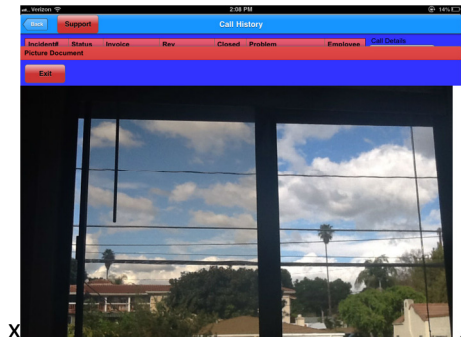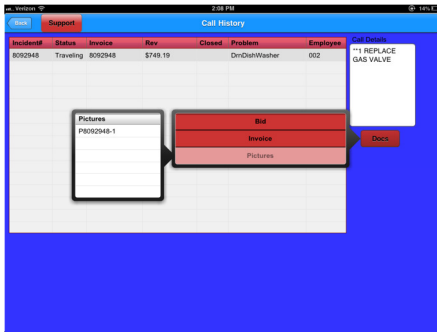
- View Averages- This will show you your averages for the current day as well as month to date.

Closed Calls

- The Closed Calls button will show you all of the calls that have been closed out for the current day.
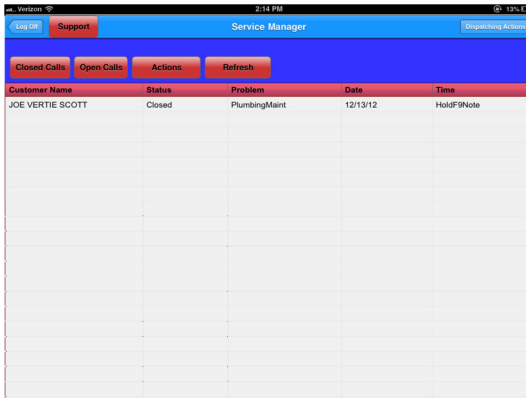
Open Calls

- The Open Calls button will show you all of the calls that are currently open and assigned to you.

Dispatching Actions

- The Dispatching Actions are you will use to complete dispatching functions such as Travel, Arrive, Bid, and close your call.

Set Up

- To set up a new tablet, download the Fastrax- Tech app from the App Store, install. When launched you'll be taken to the configuration screen.   Enter the company name attached to the apache system and static ip address of the server.
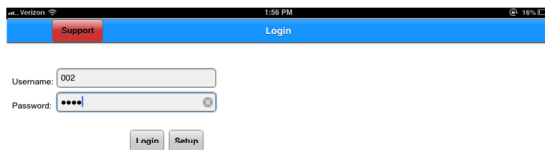

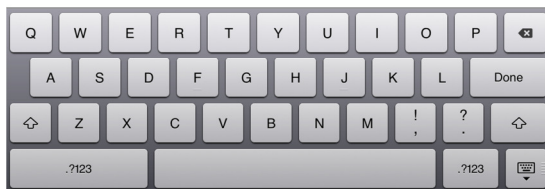## Main Usage

1. Click the Fastrax App on the homescreen of your Ipad
2. User Name = Technician Number
3. Password = 1234
4. Click Login

5. Once logged in you will see the calls that are assigned to you by the dispatchers.

6. Click the call you are going to travel to and click Dispatching Actions.

7. The next prompt will show you your Performance screen for todays information. Click Exit and you'll be shown month to date.

8. When you get to your call click on your call and click Arrive.

9. To record your job summary sheet in the system, once the customer has chosen an option, click on your call and click Dispatching actions, then Bid Sheet.
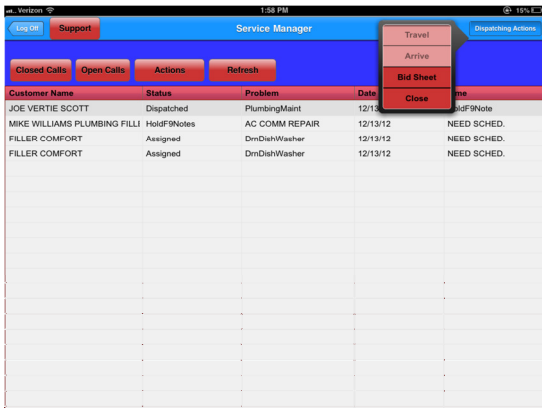
10. Click the option you wish to record. (If you have the bid sheets disabled you will only see a button for Option 1)
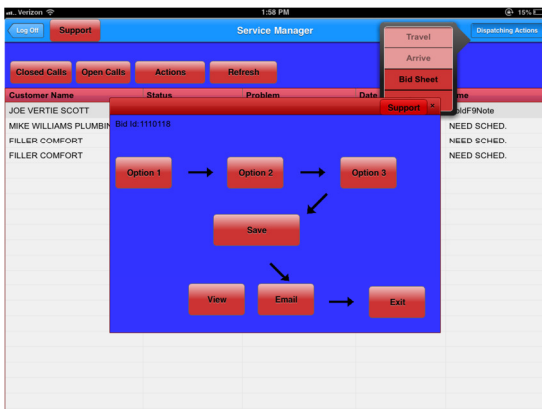
11. Once the option screen pops up click Add Task. This will add a task line to your screen.
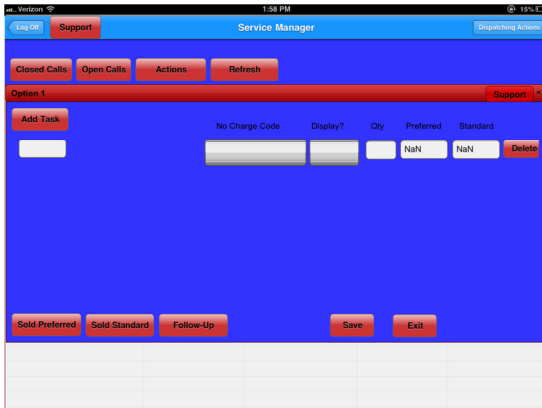
12. Click on the first box on the line to enter your task or perform a search for a task. If you search for a task, a search window will pop up, this will give you a list of available tasks you can choose from based on the information you entered. Once you find the task you sold, select the task and click Selected. This will load your task information.

13. Change the 2nd spinner wheel to say "Yes"
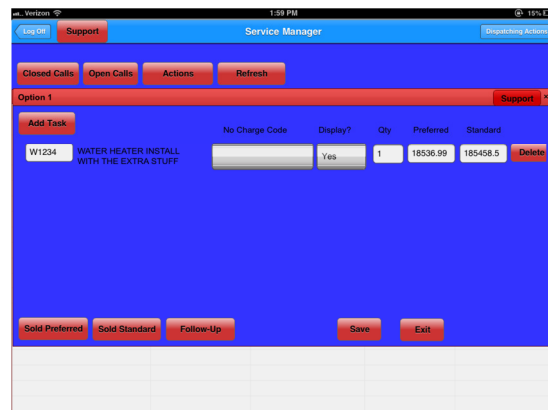
14. Repeat steps 10 – 12 for each task.

15. Click Save.

16. To have the customer sign the bid click the option the customer is selecting again, this will load the option you entered.

17. Choose whether you sold it Preferred or Standard and click the corresponding sold button.

18. A copy of your bid will pop up and let you show the customer what they are signing for.
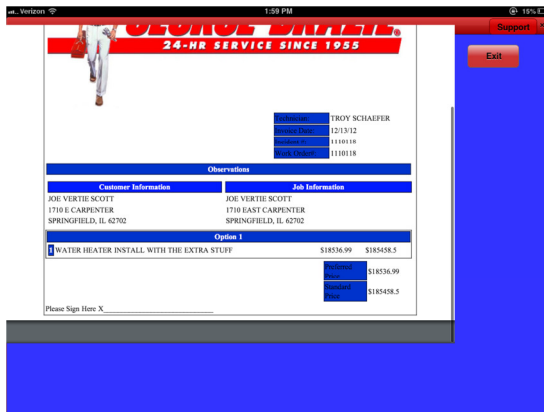
19. Click Exit

20. A signature screen will now pop up for you to have the customer sign.
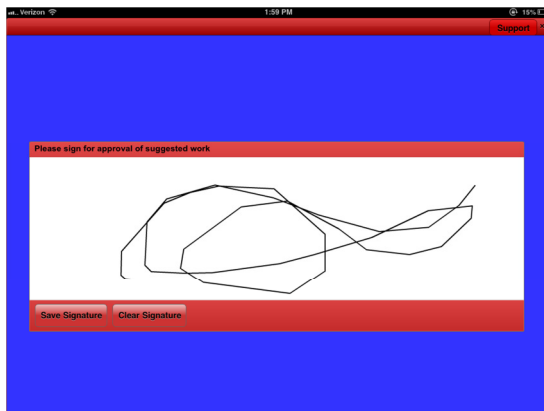
21. Once the customer has signed click Save Signature.

22. This will then sell your bid and take you back to the Update Bid Sheet screen.

23. Perform your work

24. When ready to close click on the call you are closing, click dispatching actions, and close.

25. This will load your Task Closing screen and display all the tasks you marked sold on your option sheet. (If you do not see prices next to the task make sure that the flag spinner is set to Preferred. If it doesn't show the price still, click in the Task Number box (the first box on the line) and click done. This will refresh the task and reload the prices)
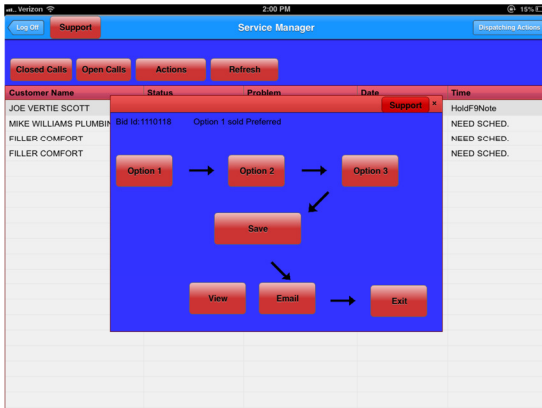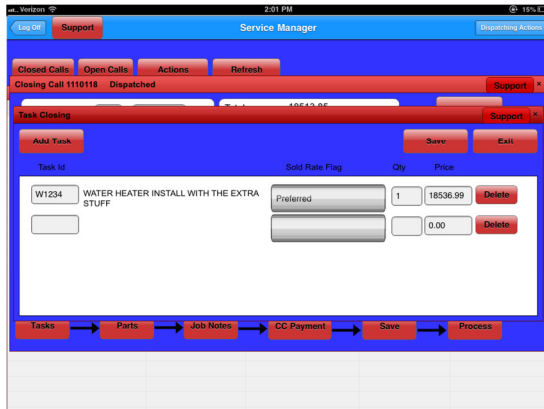

26. Add coupon tasks if necessary.

27. Click Save to save your tasks.

28. The next screen that will pop up is your Part Closing screen.

29. Click Add Part to add your parts to the job. When you click Add Part it will show a new part line, just like the Task Closing screen, you will have a Part Entry box at the beginning of the line. (If you have your part numbers available then enter your part number into the part number box, then enter your quantity.

    (Do Not Click Done when your in the Part Number box unless your want to search for a part) Repeat this step for all parts and click Save.)

30. By clicking save you are saying these are the parts you used. This will go out and search for all the parts you entered and return the results. When it returns scroll through your parts and make sure none of the description boxes or price boxes are blank. If they are that means the part is not on file and you need to search for that part.
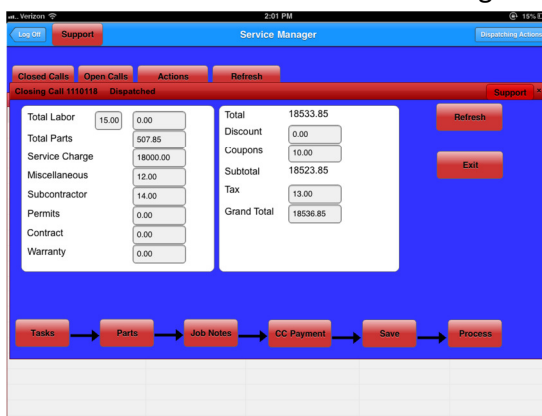
31. Once all parts are verified and all changes have been "SAVED" click exit.

32. The next screen will be the Closing Comments screen. The notes/ comments that you enter in this window will display on the invoice for your customer.
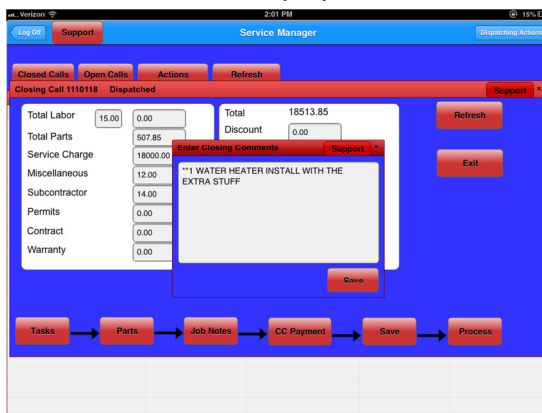
33. After the comments have been entered click save.

34. You should now be back on the Closing screen.

35. If you have any discounts enter them into the Discounts box.

36. Once entered click done on the keyboard and it will adjust your total.

37. The next step is to record your payment. By pressing the CC Payment button you will see a receipt screen pop up for you to receive your payments.

38. Click Add Row, this will add a row to your CC Payment screen.

39. With your finger, scroll up on the spinner wheel to find the payment method. Once found click save.).
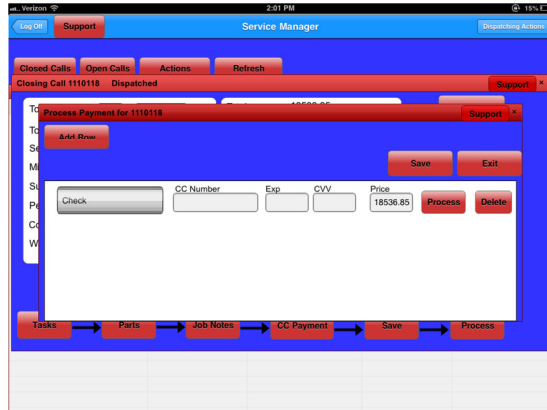

40. Once you enter your payment types in click Save.

41. You should now be back on the Closing screen.

42. Click the Save button. This will pop up a copy of your invoice allowing you to show the customer what they are signing for.
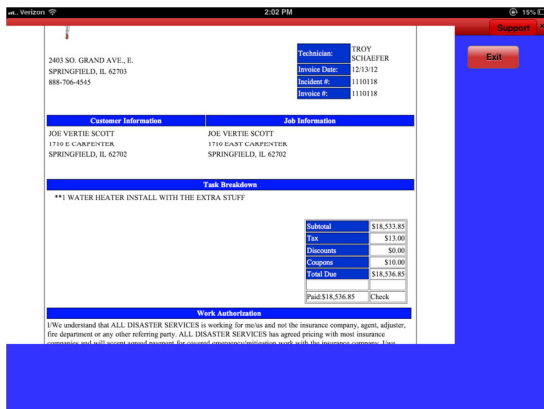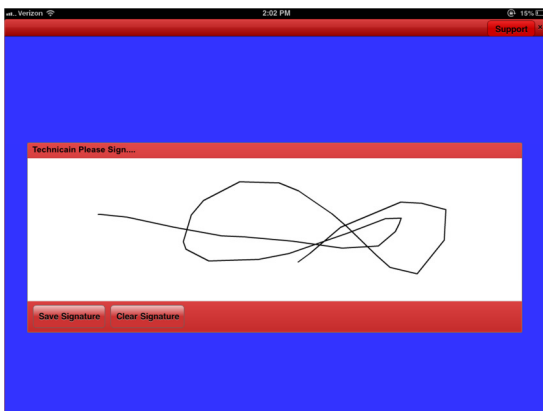

43. Once the customer agrees click Exit.

44. The final step is to click Process. This will begin the final step to finish your call.

45. You will be prompted for the customer to sign. After the signature click Save Signature.
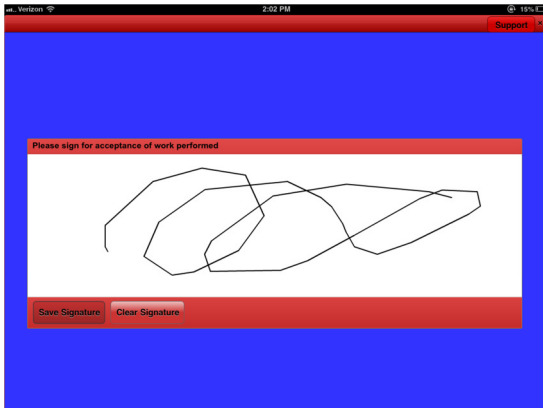
46. Next, you, the technician, will be required to sign. After the signature click Save Signature.

47. The Timecard Update box is the next item to display. This is asking you to select an item

corresponding with what you were doing from the time you closed out your last call till the

time you started traveling to this one.
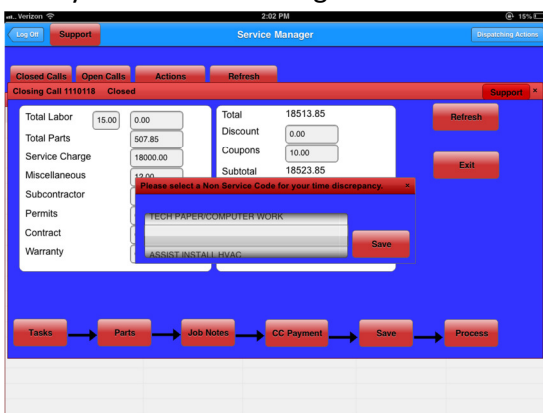
48. Click Yes or No depending on if your job was completed safely (if you click no, you will be required to fill in information about what happened on the job.)

49. After you select your Job Safety, you will be prompted to send an emailed invoice to the customer or to have the office send a paper copy (if you are not prompted click the email invoice button)

50. You will now be back on your Closing screen. Click exit and you are finished!

Other Information

- T99- T99 are performed by entering "T99" into a Task search box. This will pop up for you to create your own T99 task.
- Once you see a Task Id at the top left of the window you may continue to enter your T99 information.
- First you have to enter the Task Total.
- Once you enter the Task Total, you will then Click on the Description box and enter the description of what you are doing on the task.
- Following that you will click the Upd Parts button on the bottom of the T99 screen to enter your parts into the task.
- After parts are entered you will click Save on the Upd Parts screen. This will calculate a remaining total up in the top right (if it does not check to make sure you entered quantities on your parts).
- The remaining balance will go into the Labor Amount box. Once entered in click done on the keyboard and this will calculate your total billables.
- Click save on the T99 screen and you will be taken back to the Task Screen with your T99 task listed in front of you.

Taking Pictures

- There are two different options to take pictures through Fastrax. In the View Call screen you will see a Take Picture button and a Upload Pic button. The Take picture button will pop a camera in front of you to take the picture at that moment and it will upload it back to the server for the office to see (You must have 3G service to do this). The Upload Pic option allows you to upload pictures to the call from your camera roll. This feature can be useful when you do not have 3G on your call but you still need to get pictures attached to it. Go to your homescreen and click on the Camera Icon and start taking pictures. When you have 3G service again and you are ready to upload the pictures simply click Upload Pic. This will pop out your Camera Roll on the left hand side of the screen. Click the Photos option and click the photo you would like to upload. Unlike the Take Picture option, the photos you take with the Camera App on the homescreen will save the images to your Ipad, this can consume space if you do not delete them once in a while.