

# TECHNICIAN

The logo consists of the words "IN A BOX" in a large, bold, sans-serif font, with "SERIES" in a smaller font below it. The text is white and set against a dark, rounded rectangular background that has a white border and a slight drop shadow, giving it a 3D effect.

**Technician In a Box** includes sample data in order to illustrate the application's processes. However, this data must be imported manually. Instructions on how to import this data is outlined below.

## Quick Start Guide

1. Power up your new MC75.
2. Go to the Start Menu – Located in the upper left hand corner of the display
3. Scroll down and select (TAP) PTS **TracerPlus 6**.
4. Enter **Joe** into the **User Name** field and tap **Login**. This is the sample user login. The password is left blank.
5. The **TracerPlus Launcher Screen** will then open.
6. **Import** the sample data by selecting **File -> Import** Data from the menu at the lower left.
7. Tap the **Work Order** icon to open the entry form.
8. With populated sample data imported into the application (as described in **Step 6**), you will see a list of work orders in the grid. Tap the first order to begin.
9. Upon choosing an open work order from the data grid, The **Customer**, **Reported Problem** and **Date Promised** fields will auto-populate.
10. For additional customer info, such as **Street Address**, **Tax Rate** and **PO/Ref #**, tap the **Customer Info** button.
11. Tap **Back** to return to the main **Open Work Orders** screen.
12. Tap **Next**, then enter a description of the **Repairs Performed** in the provided **Comment** field.
13. If applicable, take photos (2) for verification by tapping the corresponding **Photo** button.
14. If new parts are required, tap the **Add Parts to Work Order** button.
15. Enter or Scan in the **Part Number** of any parts used. **Description**, **Qty on hand** and **Price** will auto-populate.
16. Enter the **Qty Used** to calculate total **Parts** cost. Repeat for additional parts then hit the **Back** button.
17. Enter relevant **Job Info** relating to labor charges. This includes **Hours (Hrs)** and **Labor** type. The **Rate** field will auto-populate based on the type of **labor** performed.
18. Total labor rate will auto-calculate based on **Labor** type multiplied by **Hrs**.
19. Tap **Finish Order**.
20. This opens the **Work Order Summary** form. Enter any additional relevant job information in the **Comments** field,
21. Choose the **Service Type**. This dropdown records whether the service is covered under **Warranty** or a **Service Contract**. If neither applies, select **Regular**.

22. **Labor Cost, Parts Total** and **Sub-Total** will auto-populate from previous calculations. **Tax** is calculated based on the Local **Tax Rate**.(See Step 10)
23. Select the **Payment Method** from the dropdown.
24. Tap **Customer Acknowledge** then present the device to customer to read the agreement and sign.
25. The customer taps the **Customer Signature field** to open the **Signature** pop up screen. Before tapping, this field will read “-Tap to Sign”
26. After signing, the customer taps **Done**.
27. The **Signature** pop up closes and the aforementioned signature field now reads “-**Signature Exists**” confirming that the customer has signed and has agreed to the terms.
28. Tap **Save and Close W/O** to complete the work order.
29. Upon closing, a field at the lower right of the form will briefly flash **CLOSED** as a confirmation of completing the work order.
30. Tap **Main** to return to **Open Work Order** list screen. The completed work order will no longer be present in the grid.
31. Repeat the process with remaining work orders.
32. Tap **Done** when finished. This will return you the **TracerPlus Launcher Screen**.
33. Tap **File -> Exit** to close the application.