

TECHNICIAN

A logo for the 'IN A BOX SERIES' featuring the text 'IN A BOX' in large, bold, white letters and 'SERIES' in smaller, white letters below it, all contained within a white-bordered square that is slightly tilted and has a drop shadow 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.