Setting Up & Using ServiceTrak™

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ECi DDMS®

August 2011, Rev.

Contents

About ServiceTrak

ServiceTrak is a mobile dispatching interface between your DDMS system and a field service technician's handheld unit. It provides field service technicians with real-time access to service calls and customer information via the Internet. Technicians have access to the same call monitor and dispatch monitor on their handheld system that is part of the backend system. They can dispatch, edit, reschedule, and close calls electronically from a customer's site.

ServiceTrak supports all types of Internet access, including Wi-Fi and conventional network connections, as well as the integrated cellular phones available in many markets.

Requirements

- A mobile, handheld device with a touchscreen, running Windows Mobile 6.0 or earlier. For uploading ServiceTrak call data into your DDMS business system, the software supports both Wi-Fi wireless Internet access and the ActiveSync software supplied with the mobile device.

Note: It does not currently support SmartPhone or laptops.

- Server with Windows® 2003 or greater connected to a network with Internet access.
- Static IP, default Gateway IP and subnet IP.
- TBL NetCom version 2.23 or greater.
- DDMS version 8.12 or greater.
- Must be authorized for eGate Interactive in ;SPC:GATE.

Setting Up ServiceTrak

To set up your system for ServiceTrak, you must:

1. Load ActiveSync.
2. Configure your host computer.
3. Install and configure the TBLNetCom program.
4. Load ServiceTrak on the host computer.
5. Deploy ServiceTrak on the mobile device.
6. Set your login options on the mobile device.
7. Set parameters on the DDMS server.

Loading ActiveSync

Install the ActiveSync program on the host computer. This software is usually supplied with the mobile device.

Configuring Your Host Computer

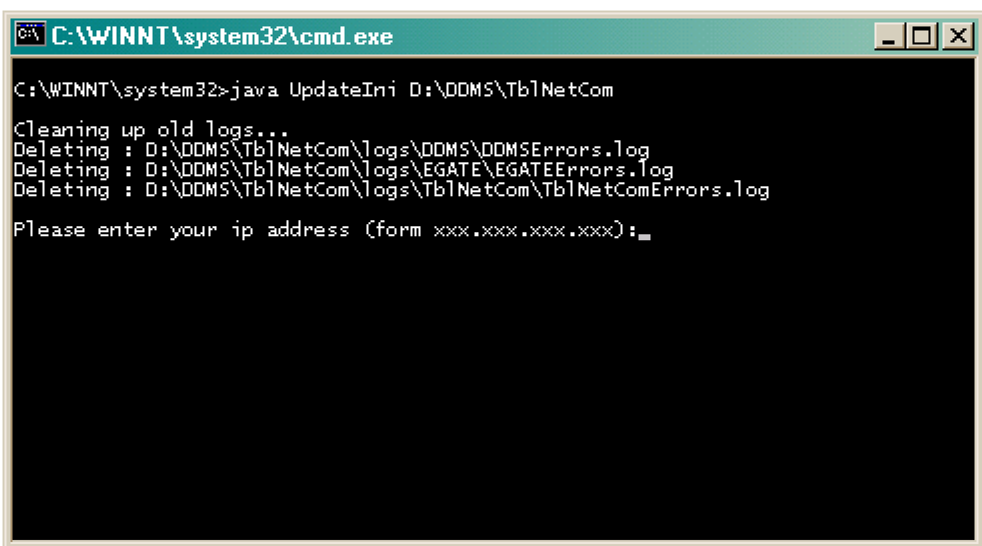
Note: If your host computer is already set up on your internal network, the following steps are not necessary. Go to the heading **Installing and Configuring TBLNetCom for the First Time**.

1. Right-click  (My Network Places) on your desktop.
2. Select Properties.
3. Right-click the local area connection.
4. Highlight Internet then select Properties.
5. Click the Use the Following IP Address button, then enter the IP Address and Subnet Mask for this machine or server.
6. In the Default Gateway box, enter the IP Address of the gateway or router.
7. Click OK until you return to your Windows Desktop.
8. Restart your server before continuing.

Installing and Configuring TBLNetCom for the First Time

The first step is to load the TBLNetCom software on your DDMS server.

Figure 1: The IP Address Prompt



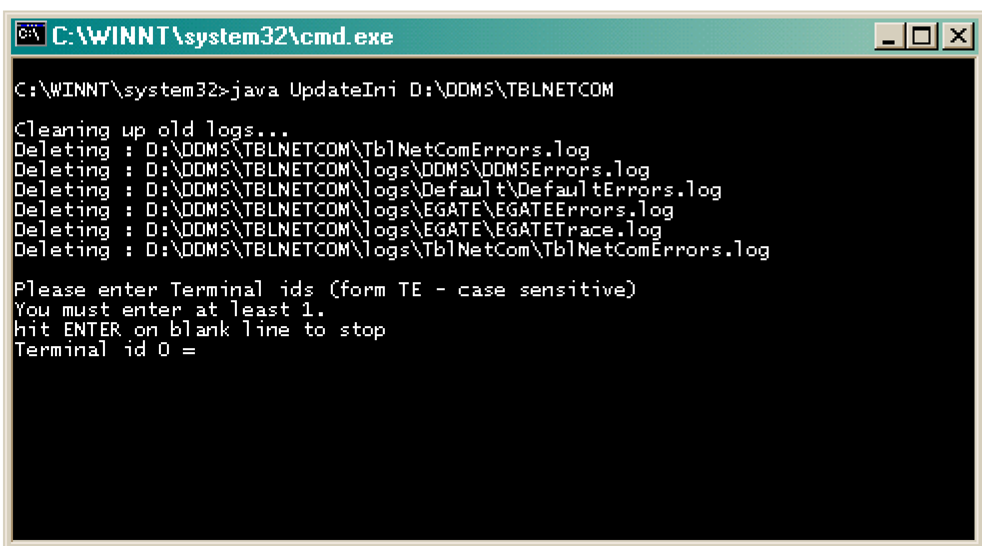
Note: If you previously installed WinNetCom on your DDMS server, you must remove it before installing TBLNetCom. You can uninstall WinNewCom through Control Panel just as you would any other Windows program.

1. Close all applications on your system.
2. Insert the CD-ROM into the proper drive.
3. Click Start, then select Run.
4. In the Run window, type the letter of your CD-ROM drive then click Browse. For example, you might type D: or E:.
5. In the Browse window, double-click the TBLNetCom folder.
6. Double-click Setup.exe. The TBLNetCom installation begins.
7. The installation continues until the Software License Agreement for the Java Software appears. Click Yes to accept the agreement.

Note: Depending on how your DDMS server is set up, you may not see the prompts in Steps 8 - 11. When the program finishes loading, go to **Step 12**.

8. The next prompt lets you choose where to load the Java software. The default path is C:. You can enter a new path or click Next to continue. The system continues loading the Java software.
9. Click Next to continue.
10. The Please Enter Your Internal IP Address prompt appears. Enter the IP address of your DDMS server. See Figure 1.

Figure 2: The Terminal ID Prompt



11 The Terminal ID prompt appears, as shown in Figure 2. Enter your terminal ID for ServiceTrak. To have order entry as master, enter a Terminal ID that is higher than the ID from the (L1) Terminal/Ticket/Printer Parameters screen.

Note: If you have more than one Terminal ID set up, keep entering them until you are finished. You must enter these in order of lowest to highest. Press Enter to continue. If you don’t know if you have more than one Terminal ID, simply enter the one that you set up in the (L1) screen.

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12 Close all open windows and restart your machine as you normally would.

Updating TBLNetCom

1 Close all applications on your system.

2 Insert the CD-ROM into the proper drive.

3 Click Start, then select Run.

4 In the Run window, type the letter of your CD-ROM drive then click Browse. For example, you might type D: or E:.

5 In the Browse window, double-click the TBLNetCom folder.

6 Double-click Setup.exe. The TBLNetCom installation begins.

7 The installation continues until the Software License Agreement for the Java Software appears. Click Yes to accept the agreement.

8 The next prompt lets you choose where to load the Java software. The default path is C:. You can enter a new path or click Next to continue. The system continues loading the Java software.

To upgrade a TBLNetCom version earlier than 1.9, go to **Step 9.**

To upgrade TBLNetCom from Version 1.9 or higher, go to **Step 10**.

9 Click Next to continue. The system continues loading the Java software.

10 The Please Enter Your IP Address prompt appears. Enter the IP address of your DDMS server.

11 The Terminal ID prompt appears. Enter your terminal ID for ServiceTrak or an ID from the (L1) screen.

Note: If you have more than one Terminal ID setup, keep entering them until you are finished. Press Enter to continue. If you don’t know if you have more than one Terminal ID, simply enter the one that you set up in the (L1) screen.

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12 Close all open windows and restart your machine as you normally would.

Installing ServiceTrak on your Host Computer

Install ServiceTrak from your DDMS software CD.

1. Close all applications on your system.
2. Insert the CD into your CDROM drive.
3. When the AutoRun menu opens, click Other Products.
4. Click ServiceTrak and follow the prompts on your screen.
5. If you are prompted to install SQL Server CE, SQL Client 2.0, .NET Compact Framework, or ServiceTrak, click Yes.
6. If your mobile device is docked, the ServiceTrak files are automatically deployed. Go to **Setting Login Options.**

   If your mobile device is not currently docked, the files are deployed the next time the mobile device is connected to the host computer.

Deploying ServiceTrak on a Mobile Device

Before you deploy ServiceTrak:

- The mobile device must be connected to the host computer via a cradle and cable or dock. The dock is usually supplied with the mobile device.
- The ActiveSync program must be loaded on the host computer. This software is also usually supplied with the mobile device.
- ServiceTrak must be installed on the host computer.

Note: If you have previously installed an earlier version of ServiceTrak, you must uninstall it before installing the new version.

To deploy ServiceTrak:

1. On the host computer, click Start, select Programs and ECI, then click Deploy.
2. If you are prompted to install SQL Server CE, SQL Client 2.0, .NET Compact Framework, or ServiceTrak, click Yes.
3. Reset your mobile device.

Setting Login Options

The first time you use your mobile device, you must set your user options.

1. In the Login Options window, shown in Figure 3, tap the URL box and enter the ServiceTrak URL if the default does not display.

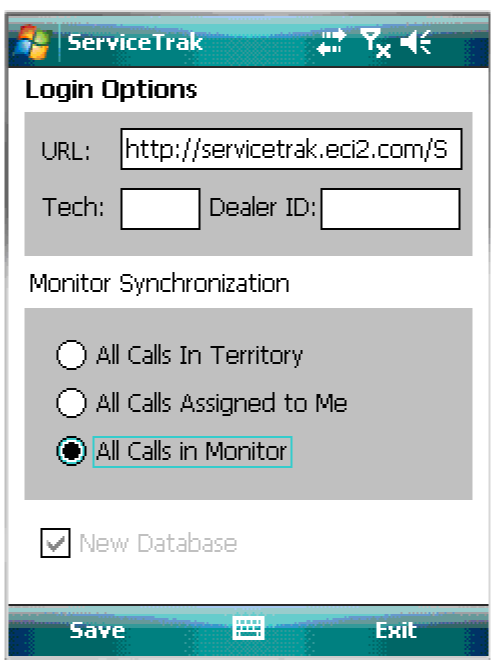
Note: You can open the Login Options window from the Call Monitor by tapping .

2. Tap the Tech box. Enter your user ID from DDMS.
3. Tap the Dealer ID box. Enter a dealer ID for this mobile device.
4. In the Monitor Synchronization box, select which calls to bring into the handheld.
    - Select All Calls In Territory to import only the calls in the territory for this tech.
    - Select All Calls Assigned to Me to import only the calls assigned to this tech.
    - Select All Calls In Monitor to import all calls.

Note: The first time that you connect the device, you must click the New Database check box.

5. Tap to save your changes.

Figure 3: The Login Options Window



6 Tap .

7 The information is saved, but is not effective until the mobile device is synchronized. At the Are You Sure message, tap Yes to synch the Call Monitor.

Setting Parameters on your DDMS Server

Normally, tickets are ended at a status 6 and then print to the printer named in the (L1) screen. However, when creating and updating calls in ServiceTrak, you can hold tickets at a status 4 until complete. You can also delay printing until you end the ticket.

1 Open TBL Client and go to the (EZ1B) Serial Contract / Meter Billing Parameters screen.

2 In the (EZ1B) screen, type **C** in the Action field.

3 Tab to the Update Order to Status 4 field and type **Y**. See Figure 4.

4 In the Don’t Print Ticket field, type **Y**.

5 Press Enter to return the cursor to the Action Code field. Press Esc to return to the Master Menu.

Figure 4: The (EZ1B) Serial Contract/Meter Billing Parameters Screen

```
10:10:43        (EZ1B) Serial Contract/Meter Billing Parameters        11/18/05
================================================================================
Action [I] (C=Change, I=Inquiry, B=Back to EZ1)           G/L Location [ 1]
================================================================================
Update Meter Bill File Y/N ?      Codes  Call :    Problem :    Solution :
Update “Next Bill Date” with Contract Anniversary Day of Month Y/N ?

Set Billing Specials As Call Text During “MA” Y/N ?

Auto-Billing Order Writer #        Auto-Billing Day Of Month #
Skip Check Of A/R When Renewing In EZU Y/N ?
Change Contract Dates For Renewals In Order Entry Y/N ?
Move EZJ History To EZK When Renewal Updated Through EZU Y/N ?
Allow Renewing Expired Contracts In EZU If Auto-Renew Is Yes Y/N ?
Defer Sales To “JOUR-S”, “C-AUX”, & “S-HISTORY” For Deferred Income Y/N ?
Ignore Billing Frequency When Billing Meters Y/N ?
Set an Average Meter Reading when none input Y/N ?
Use Individual Machine Contracts for Umbrella Billing Information Y/N ?
Skip Printing Serial Specials on Furniture Rental/Demo/Loaner Invoices Y/N ?
For Serialized Gateway:  Update Order to Status 4 Y/N Y   (Default is Status 6)
                         Don’t Print Ticket Y/N ?
Only the following Codes will deplete Time Block time (blank for all codes):
     Which type of Code C/P/S ?    From [  ] to [  ] + [  ,  ,  ,  ,  ]
```

Using ServiceTrak

ServiceTrak has two major applications: Call Monitor and Dispatch Monitor.

To begin using ServiceTrak:

1. Tap Start.
2. Tap ServiceTrak.
3. At the ServiceTrak login window, shown in Figure 5, you can select to change options at begin time if needed.
4. Enter your tech number in the Tech box. Click to open the keyboard.
5. In the Password box, enter your password.
6. Tap Login.
7. The ServiceTrak program opens.

Using the Call Monitor

You can:

- Synchronize the call monitor
- View call details
- Dispatch calls.

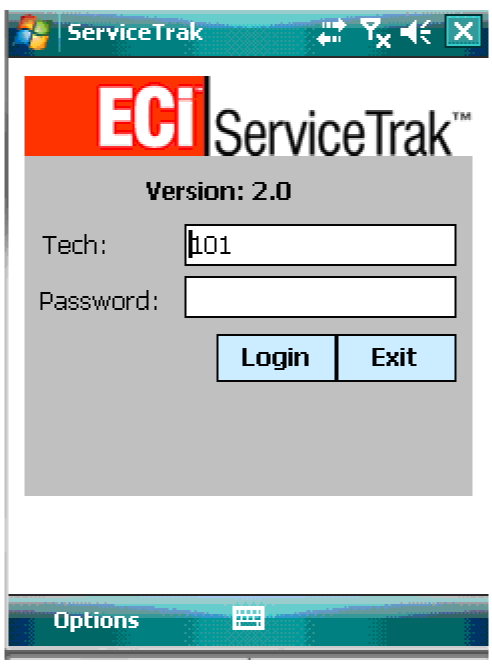


Figure 5: The ServiceTrak Login Window

Synchronizing the Call Monitor

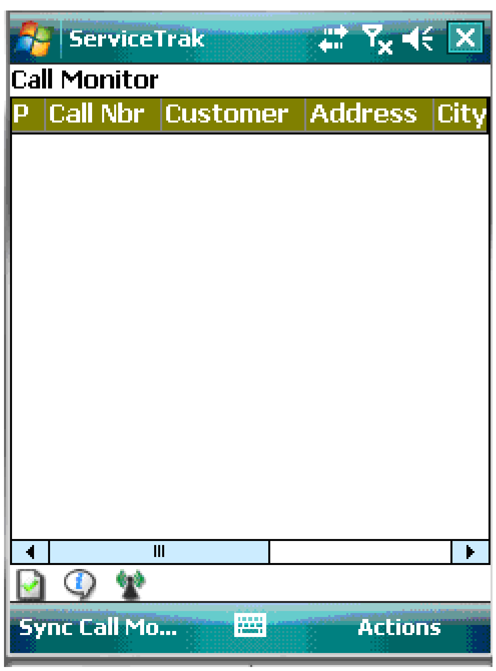
Synchronizing the Call Monitor also synchronizes the Dispatch Monitor. The first time that you connect, nothing is displayed in the call monitor until it is synched.

1. Tap Sync Call Monitor or tap . See Figure 6.
2. In the Are You Sure box, tap Yes.
3. The handheld connects to the host computer. The information on your handheld updates the host computer and the host computer updates your handheld.

Viewing Call Detail

1. In the Call Monitor, tap the call to view.
2. Tap the Actions menu and select View Call Detail or tap . The Call Information window opens. It is for information only; you cannot change any information in this window.

Figure 6: The Actions Menu

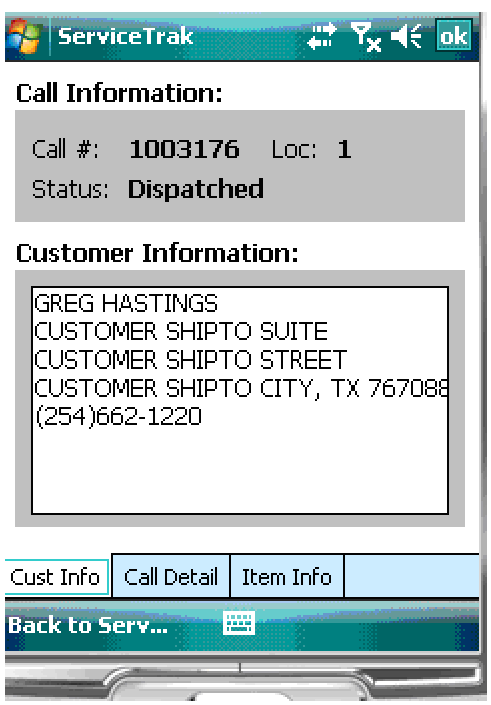


Three tabs appear at the bottom of the window:

- The Cust Information tab, shown in Figure 7, has a Customer Information box in the middle of the window. It displays the customer's name, address and phone number, as well as the contact's name. The Call Information box at the top of the window shows the call number, the location, and the call's status.
- The Call Detail tab has a Problem box in the middle of the window. It displays the problem, type and priority. The Call Information box at the top of the window displays the call number, the tech number and the call code.
- The Item Information tab has an Item / Machine Information box at the top of the window. It displays the item number, description, system number, serial number and location. A second box at the bottom of the window displays the contract, its end date and whether the contract covers parts, labor, or both.

3 When you finish, tap Back to ServiceTrak at the bottom of the window.

Figure 7: The Customer Information Tab



Dispatching a Call

1 In the Call Monitor, tap the call to dispatch.

2 Tap the Actions menu and select Dispatch Call or tap . The Dispatch Call dialog box opens. Tap Yes.

3 The Update Call window opens. Go to **Updating a Call**.

Using the Dispatch Monitor

1 In the Actions menu, tap Display Dispatch Monitor. The Dispatch Monitor opens. See Figure 8.

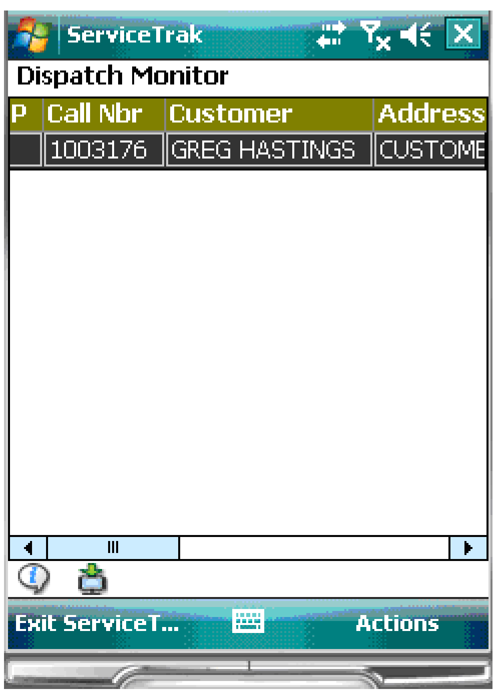
2 To download the latest information from the server, tap the Actions menu and select Sync Dispatch Monitor.

3 In the Are You Sure box, tap Yes.

4 The handheld connects to the host computer and downloads the latest information. You can:

- View a call
- Update a call
- Close a call.

Figure 8: The Dispatch Monitor



Viewing a Call

1 In the Dispatch Monitor, tap the call to view.

2 Tap the Actions menu and select View Call Info. The Call Information window opens. It is for information only; you cannot change any information in this window. The Call Information box at the top of the window displays the call number, the location and the call's status.

The Call Information window has three tabs at the bottom:

- The Cust Info tab displays the customer's name, address and telephone number.
- The Call Detail tab displays the problem, call type and priority.
- The Item Info tab displays the item, description, system number, serial number and machine location. See Figure 9.

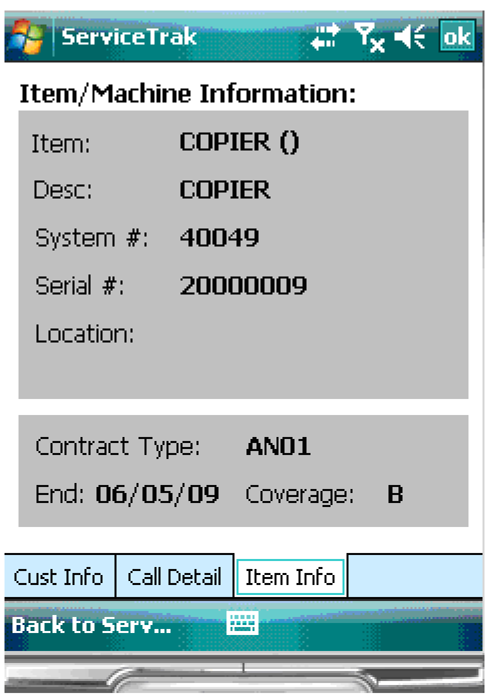
3 To return to the Dispatch Monitor, tap Back to ServiceTrak.

Updating a Call

1 In the Dispatch Monitor, tap the call to update.

2 Tap the Actions menu and select Update Call. The Update Call window opens. See Figure 10. The Update Call window has five tabs at the bottom. Tap a tab to open it, then tap the box to update.

Figure 9: The Item Info Tab



You can update times, problem and solution codes, meter readings, parts, and call status. You must do so to view the information on the handheld. See the following headings for more information:

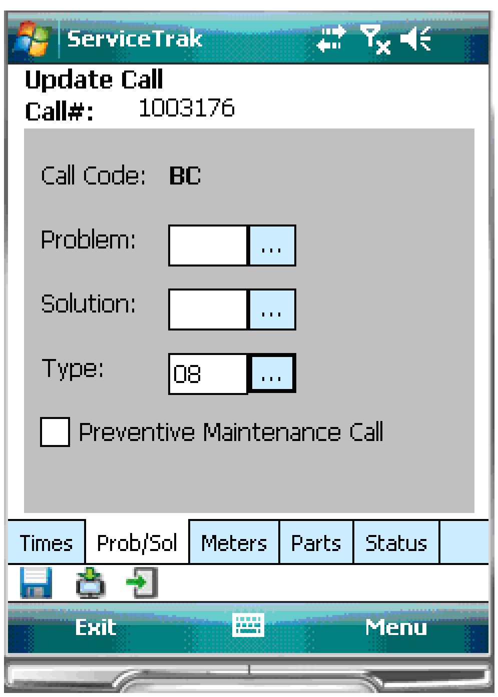
- **Using the Times Tab**
- **Using the Prob/Sol Tab**
- **Using the Meters Tab**
- **Using the Parts Tab**
- **Using the Status Tab**.

3 When you finish:

- Tap to save the call locally.
- Tap to save the call locally and update the host computer.
- Tap to exit the call without saving the new data.

4 At the Are You Sure message, tap Yes.

Figure 10: The Update Call Window's Prob/ Sol Tab



Using the Times Tab

In the Times tab, you can enter a start date and time, completion date and time, and the miles traveled. See Figure 11. The Calculated Times box displays your travel and work hours. (The Calculated Times box is read-only.)

1. Tap the first Start box and enter the starting date.
2. Tap the second Start box and enter the starting time.
3. Tap the first Complete box and enter the date you completed the call.
4. Tap the second Complete box and enter the time you finished the call.
5. Tap the Mileage box and enter your mileage.
6. The Calculated Times box displays the time spent traveling and working.

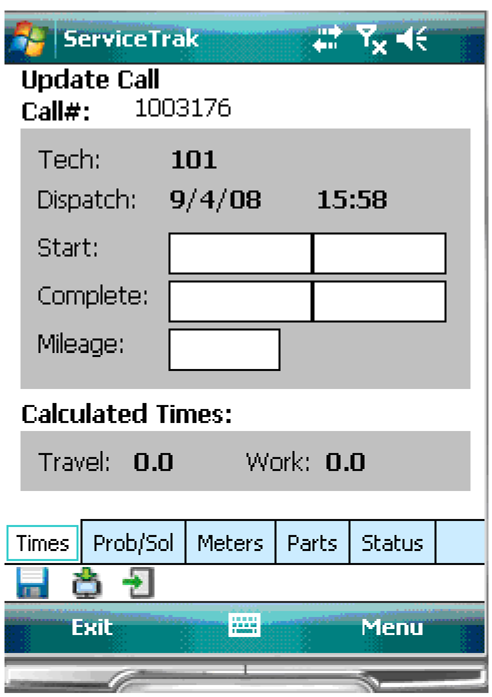


Figure 11: The Times Tab in the Update Call Window

Using the Prob/Sol Tab

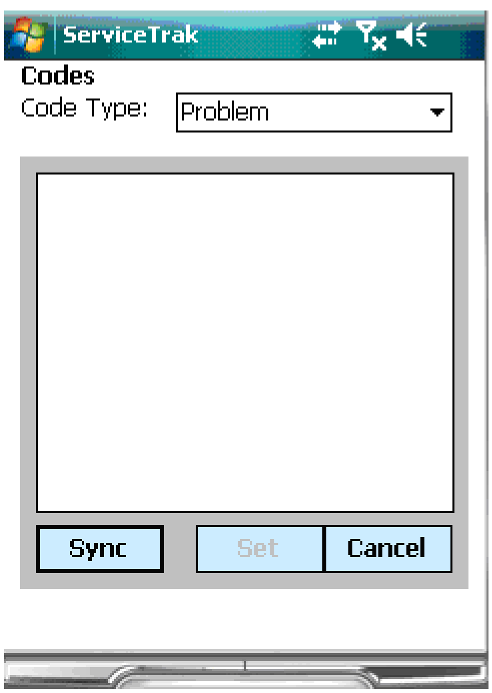
In the Prob / Sol tab, you can enter a problem code, solution code and type code. (The Prob / Sol tab is shown in Figure 10.)

1. In the Problem box, tap ... to look up the problem code. The Codes window opens.
2. In the Code Type box, tap the down arrow and select Problem. The available problem codes display in the window. You can update the available codes by clicking Sync. Tap a code to select it, then tap Set. See Figure 12.

Note: The first time you use ServiceTrak, you must synch each code type.

3. In the Solution box, tap ... to look up the solution code. The Codes window opens.
4. In the Code Type box, tap the down arrow and select Solution. The available solution codes display in the window. You can update the available codes by clicking Sync. Tap a code to select it, then tap Set.
5. In the Type box, tap ... to look up the type code. The Codes window opens.

Figure 12: The Codes Window in the Prob/Sol Tab



6. In the Code Type box, tap the down arrow and select Type. The available type codes display in the window. You can update the available codes by clicking Sync. Tap a code to select it, then tap Set.
7. To mark this as a preventive maintenance call, tap the Preventive Maintenance Call box to check it.

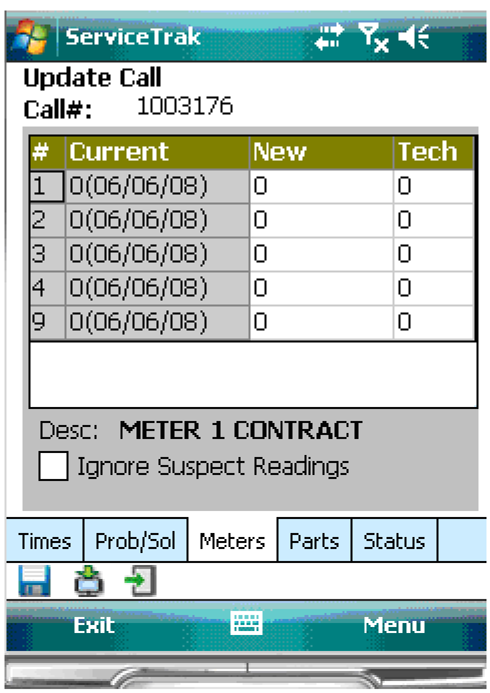
Using the Meters Tab

The Meters tab shows the current meter reading for each machine, the number of new copies and the tech number. See Figure 13.

You can tap a box in the New column and enter a new reading. You can also tap a box in the Tech column and enter the number of clicks used.

You can tap a machine number to see the description of its contract. For example, the description might include the number of copies allowed in a quarter. You can ignore suspect readings by tapping the Ignore Suspect Readings check box.

Figure 13: The Meters Tab in the Update Call Window



Using the Parts Tab

In the Parts tab, you can add items to the ticket and adjust inventory. See Figure 14. You can do this either manually or using an attached barcode scanner. Before you add items, however, you need to synchronize the mobile device with the inventory in the DDMS system.

To synchronize your item database:

Before items are available to use in the Parts tab, you must synchronize the inventory with your DDMS system. The ServiceTrak inventory sync uses the inventory location set in the Inventory box in the DDMS Salesperson Technician tab to determine which items to bring over to ServiceTrak.

Note: Setting the inventory location is important because it limits the amount of records imported to those matching the technician's inventory location. DDMS recommends that you do not enter a location of 1 in the Location box. If you do so, all records from the I-AUX file are imported and may exceed the memory capacity of the mobile device.

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1. Click ... in the Parts tab. A popup screen showing the inventory displays.
2. Click . The item number, manufacturer, and description for the items in the technician's inventory are retrieved.

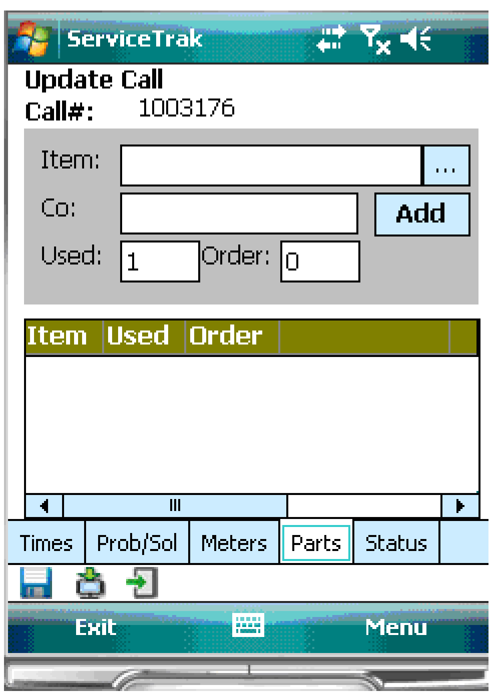

Figure 14: The Parts Tab in the Update Call Window

To add items to the ticket manually:

1. Tap the Item box and enter the item number.
2. Tap the Co box and enter the manufacturer.
3. Tap the Used box and enter how many of the item you are removing from inventory.
4. Tap the Order box and enter how many of the item to order.
5. Tap Add.
6. When you finish, tap .
7. At the Are You Sure message, tap Yes.

To add items to the ticket using a barcode scanner:

1. Tap the Item box.
2. Scan the item’s barcode. The Item and Co boxes fill automatically.
3. Tap the Used box and enter how many of the item you used for the call.
4. Tap the Order box and enter how many of the item you need to complete the call.
5. Tap Add.
6. When you finish, tap .
7. At the Are You Sure message, tap Yes.

To remove a part:

1. Tap and hold the part to remove.
2. A menu opens. Tap Remove Part.
3. The part is removed.

Using the Status Tab

In the Status tab, you can update a call's status. See Figure 15.

1 Tap the P/O # box and enter the P/O number of the call to update if applicable.

2 In the Status box, tap the down arrow. From the drop down menu, you can select the status at which to close this call.

3 Tap the first Return box to enter the date of the scheduled return.

Note: The Return boxes are only active for callbacks.

4 Tap the second Return box to enter the time of the appointment.

Closing a Call

1 In the Dispatch Monitor, tap Update Call.

2 Tap the Status tab.

3 Tap the down arrow in the Status box.

4 Tap Complete (No Bill) or Complete and Bill.

5 The next time the handheld is synched to the host computer, the host computer closes the call and the call is removed from the Dispatch Monitor.

Figure 15: The Status Tab in the Update Call Window