

Acowin Technician Bio Setup

Technician Biography - If you have the optional e-mail / Paging module, you will now be able to e-mail a Technician Biography to the customer prior to the technician's arrival. The Tech Bio can include information such as your Company Name, Address & Phone Number, Logo, Call Slip Number, Scheduled Time Range (optional), information about your company, a picture of the technician as well as the tech's name and a brief biography about the technician which can include both company achievements as well as personal traits. What a great way to introduce your company and the technician to your customer before they ever arrive.

Team Air Conditioning

11928 Fairway Lakes Drive
Ft. Myers, FL 33913
[239-437-8898](tel:2394378898)

Scheduled Technician Profile

Nathan Tuttle



Nathan Tuttle, a NATE Certified HVAC technician with our company, will soon be arriving at your requested location to meet your Comfort System repair needs. Nathan has successfully completed extensive HVAC certifications and has passed all given motor vehicle, drug and background screenings. You can trust Nathan to take care of your comfort needs in a professional and courteous manner! If you have any questions about your appointment, or if you need to make a change, please call [239-437-8898](tel:2394378898). We look forward to serving you.

Below are the instructions in order to setup the technician bio feature. Remember you must have the optional email license in order to use this feature.

Resize Company Logo and Technician Photos

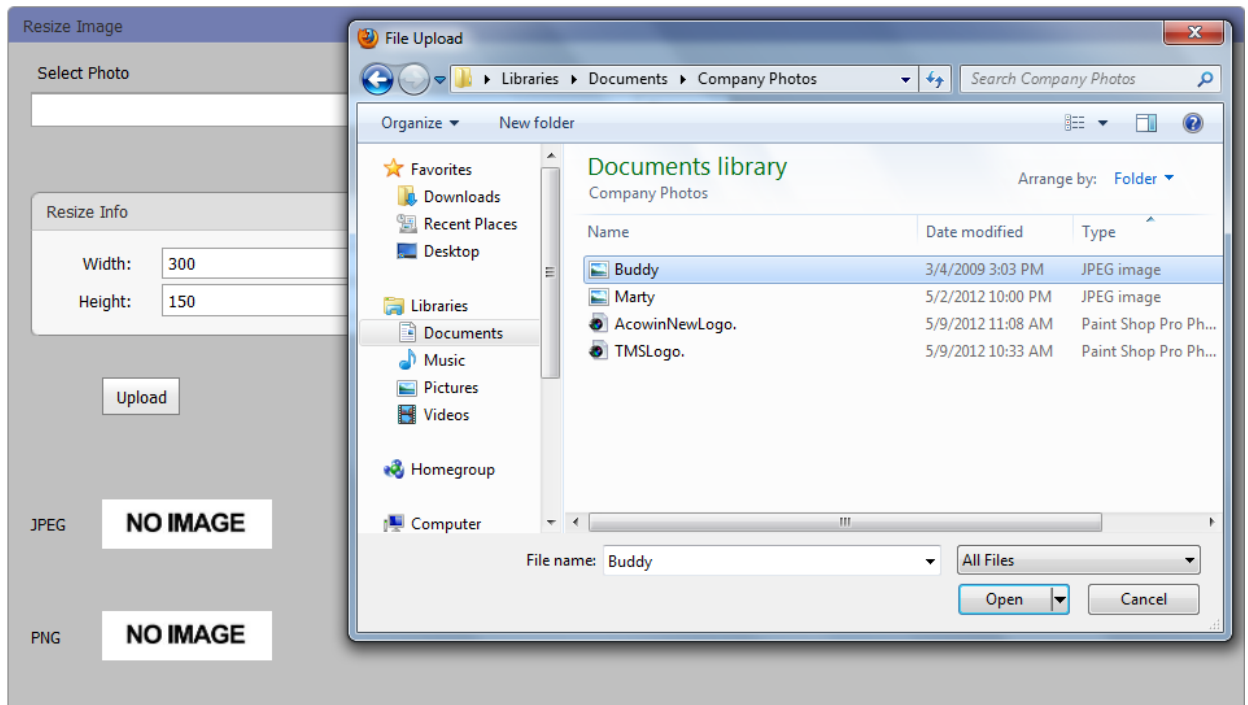
I recommend creating a folder under your my documents called Company Photos and place all of your logos and technician photos in that folder for easy access later. Make sure the folder is on your local computer such as my documents. Do not save on a network drive.

In order for your photos to fit in the appropriate designated spot within the Acowin Tech Bio feature your photos must be a specific size. We have created a website strictly designed for resizing your logos and photos to the appropriate size.

1. Go to the following website <http://support.acowin.com/photos/Resize.aspx>
Below is a screen shot of the website

The screenshot shows a web application titled "Resize Image". At the top, there is a "Select Photo" section with a text input field and a "Browse..." button. Below this is a "Resize Info" section containing two input fields: "Width" with the value "300" and "Height" with the value "150". To the right of these fields is a "Recommended Sizes:" section with two rows: "Logo" with dimensions "W: 300, H: 150" and "Employee Bio" with dimensions "W: 150, H: 250". Below the "Resize Info" section is an "Upload" button. At the bottom, there are two rows representing image formats: "JPEG" and "PNG", each with a "NO IMAGE" placeholder.

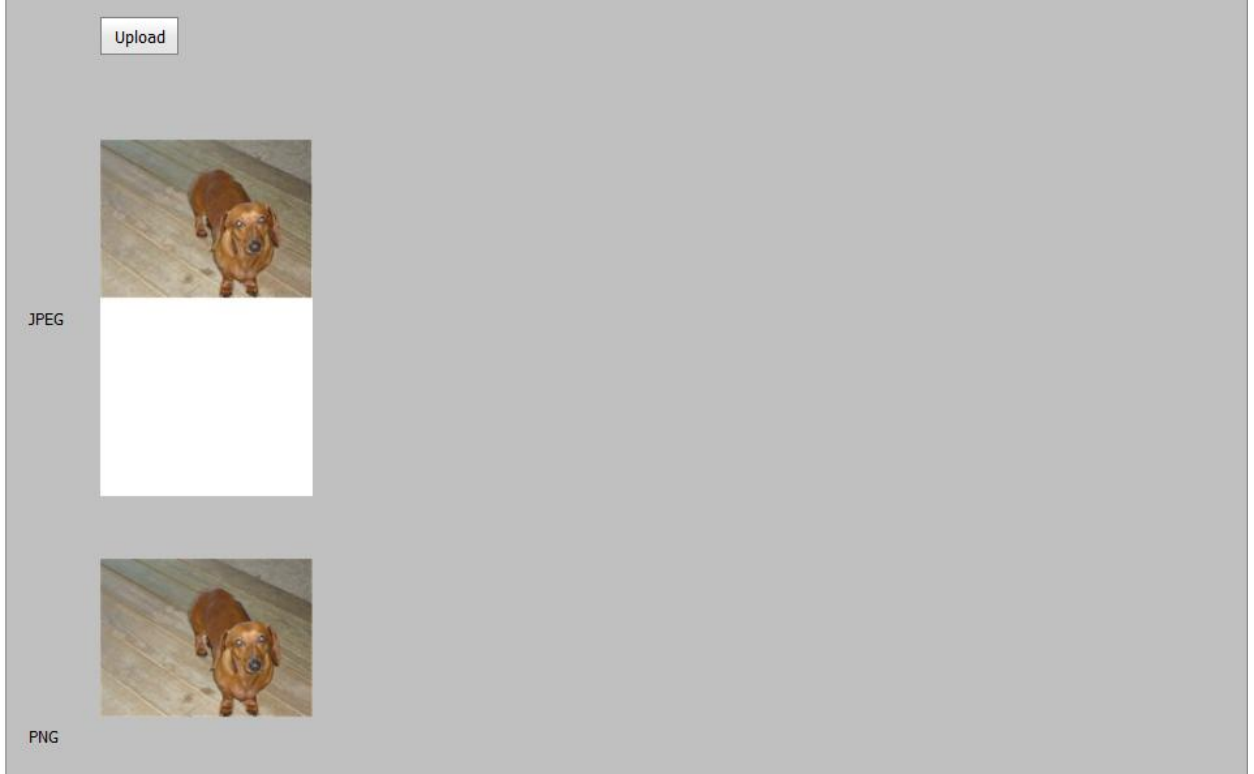
2. Click Browse to the right of the Select Photo. Navigate to the folder you created that has all of your photos in it. In my example I created a folder called Company Photos under My documents.
3. Select the photo you want to resize and click open (See below)



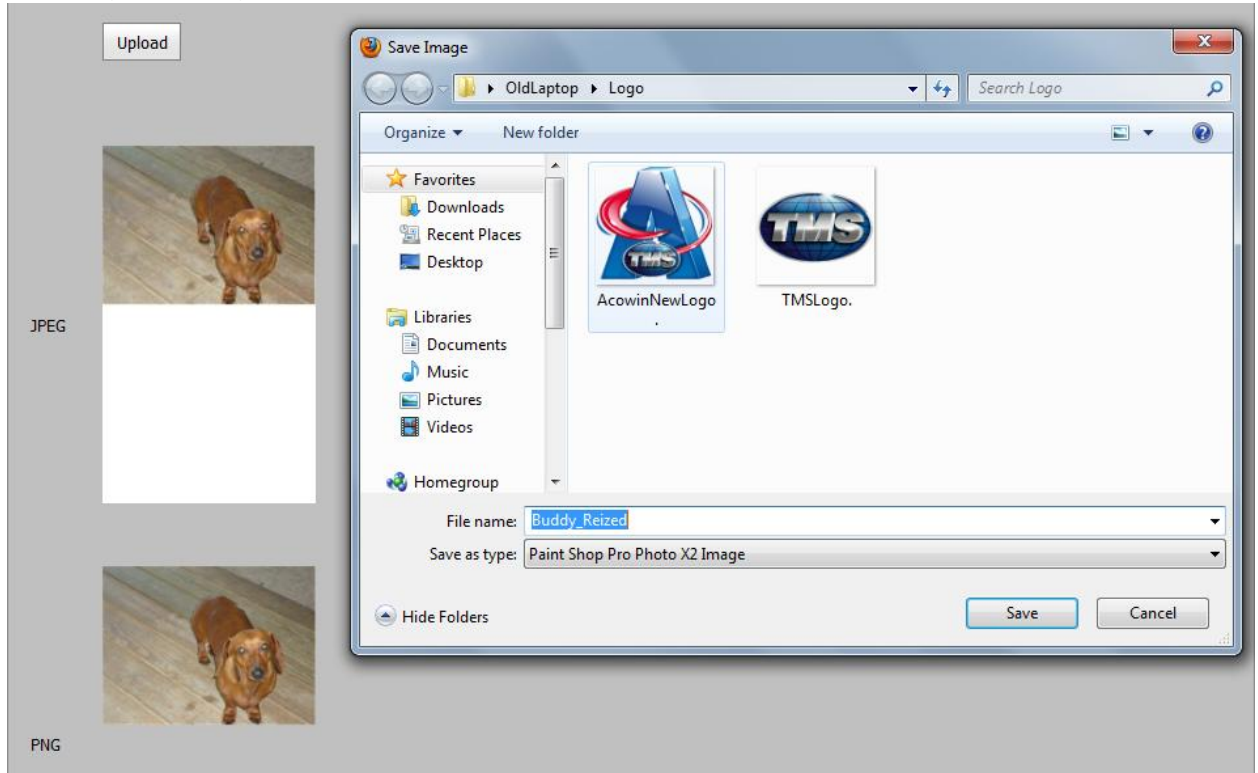
4. You will then see the file name of your photo under the select folder. If it is the company logo then the resize info is correct. If you are resizing a technician picture then you will need to adjust the width to 150 and the height to 250 by simply typing over the size that is currently in there. Then click upload. (See below)

The screenshot shows a 'Resize Image' window with a blue header. Below the header, there is a 'Select Photo' section with a text input field containing 'Buddy.JPG' and a 'Browse...' button. To the right of this is a 'Recommended Sizes' section with two rows: 'Logo' with dimensions 'W: 300, H: 150' and 'Employee Bio' with dimensions 'W: 150, H: 250'. Below the 'Select Photo' section is a 'Resize Info' box containing two input fields: 'Width:' with the value '150' and 'Height:' with the value '250'. Below the 'Resize Info' box is an 'Upload' button. At the bottom of the window, there are two rows for image format selection: 'JPEG' and 'PNG', each with a 'NO IMAGE' button.

5. You now see 2 options for your photos. You will want to right click on the PNG photo and choose Save Image As. (See Below)



6. You will then see the Save Image option box pop up, I would suggest renaming the file name to the techs name and then resized behind it such as you see above I have Buddy_Resize, so you will know which image to choose when setting up each individual employee, and make sure you are saving it to the folder you created under your my documents. Then click save.
7. Then repeat #1-6 under Resize Company Logo and Technician Photos until all of your photos are resized. (See Below)



Setup Employee Tech Bio Tab

1. Click on Employee File on main menu of Acowin and search for the technician that you want to setup the tech bio on
2. Once you are on the technicians file, click on the Employee Bio tab and then click edit. (See Below)

The screenshot shows the 'Employee Information' window in the Acowin software. The window title is 'Employee'. The main section is titled 'Employee Information' and contains several input fields for personal and contact information. Below this, there are three tabs: 'General Info', 'Personal Info', and 'Employee Bio'. The 'Employee Bio' tab is currently selected and active. It contains a dropdown menu for 'Employee Type' set to 'Technician', and fields for 'Hire Date', 'Termination Date', 'Phone', 'Cell Phone', 'Paging Carrier', 'Paging Number', and 'Email'. To the right of these fields are two groups of checkboxes: 'Create Reminders' with options for 'Contract Inspections' and 'Contract Invoices', and 'Mapping Options' with radio buttons for 'Begin' and 'End', each having 'Office' and 'Home' options. At the bottom of the window, there is a toolbar with various icons and a set of buttons for navigation and actions, including 'Time Cards', 'Tech', 'Dispatcher', 'Employee Info', 'Departments', 'Pay Rates', 'AcoTruck', 'Remote Tech', 'Leave', 'Password', and 'Permissions'.

Employee Information

First Init. Last Emp Num [suggest](#)

Address 1

Address 2

City, ST, Zip

Employee Type Hire Date Termination Date

Phone () - Cell Phone () -

Paging Carrier Paging Number Email

Create Reminders Contract Inspections Contract Invoices

Mapping Options Begin Office Home End Office Home

Time Cards Tech Dispatcher Employee Info Departments Pay Rates AcoTruck Remote Tech Leave Password Permissions

3. Fill out the Display Name (how you want your techs name to appear in the email)
4. Fill out his Biography (information about the technician you would like your customer to know)

See Below

Employee Information

First Init. Last

Address 1

Address 2

City, ST, Zip

Emp Num [suggest](#)


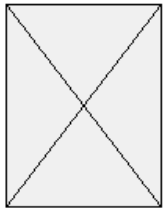

Name Code

General Info | **Personal Info** | **Employee Bio**

DisplayName

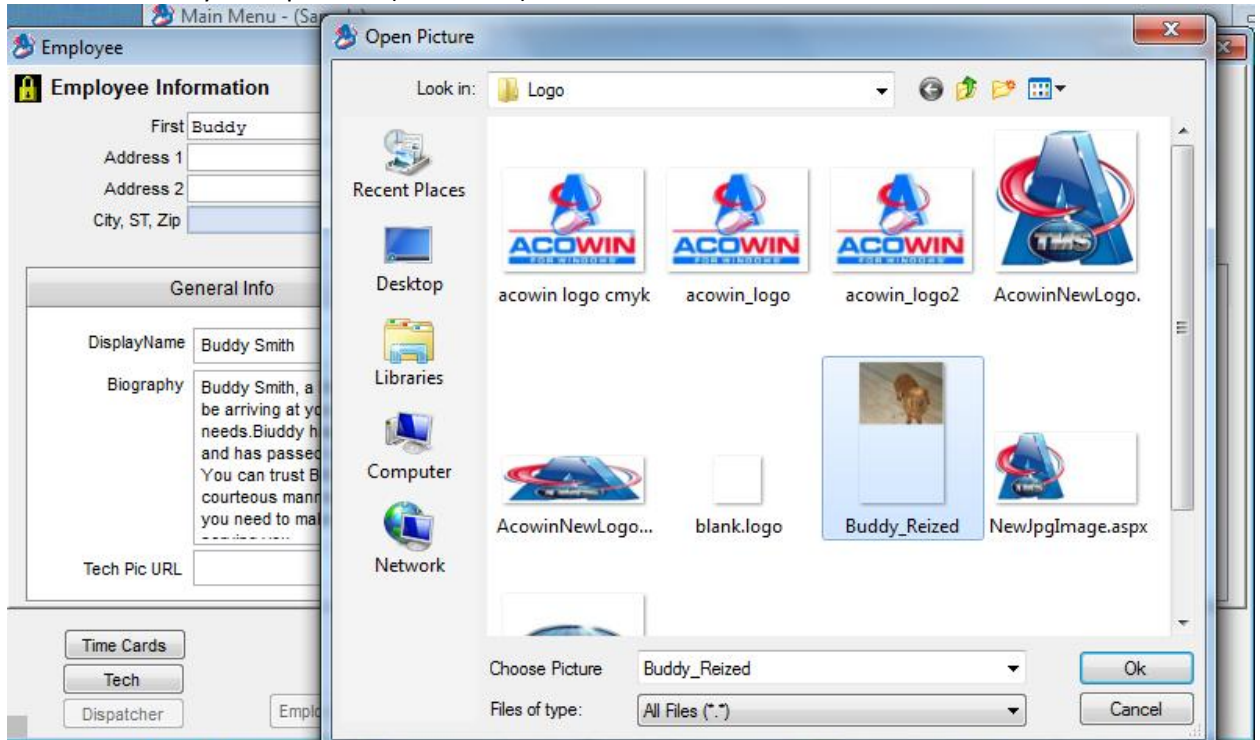
Biography

Tech Pic URL

Photo   

Time Cards | Tech | Dispatcher | Employee Info | Departments | Pay Rates | AcoTruck | Remote Tech | Leave | Password | Permissions

5. Click on the camera icon to select the technicians photo
6. You will then see the Open Picture box pop up. Navigate to the area where you saved your resized photos. In my example I saved them under a folder called Company Photos under my documents. If you do not see the resized photo you created make sure to change the Files of type to show All Files. Then select your resized photo and click OK.
7. Then you will click the Upload button below the techs photo. It will then prompt you for a Site ID and Password. Your site id and pswd is the same as your member id and pswd that you use to access the Acowin Support Website. If you do not have that information, please feel free to email us at support@acowin.com requesting your site id and password and we can respond with the information you requested. (See below)



8. So now you should see the techs picture to the right and we have filled out the Tech Pic URL for you. Click Save. (See Below)
9. Repeat # 1-8 under Set up Employee Tech Bio until all of your technicians have been setup.
10. Next you will need to create a URL for your company logo so the Company Bio can be setup. Search for an employee such as Guest or yourself (someone who is not a technician)
11. Once on the employee that you select, click on the Employee Bio Tab, Edit, Select Camera and locate your company logo. Select the company logo and then click ok. Your logo should now be in the tech photo field then select upload. Once uploaded you will notice we filled out the Tech Pic URL. Copy this entire URL by highlighting and using Cntrl C to copy. You can then delete the URL out of there if you would like or leave it there incase you need for future references. Make sure to paste the URL onto something like TXT file or Word Doc so you will have for next step.

Employee Information

First: Inf. Last:

Emp Num: [suggest](#)

Address 1:

Name Code:

Address 2:


City, ST, Zip:

General Info | **Personal Info** | **Employee Bio**

DisplayName:

Biography:

Tech Pic URL:

Photo: 

Time Cards | Tech | Dispatcher | Employee Info | Departments | Pay Rates | AcoTruck | Remote Tech | Leave | Password | Permissions

Setting up Company Bio

1. Click on Company Setup from Acowin Main Menu
2. Click on Internet Tab (See Below)

Setup

Internet Information

Company Email Information

Outgoing (SMTP)

Account Name

Account Password

Email Address

ReplyTo

Employee Bio Information

Company Logo URL

Send From Email

Send From DisplayName Show Estimated Arrival Time

Company Bio Text

Company Settings Internet Service Labor Defaults JobCost Labor Defaults Subsystems

Print Undo Redo Save Help

3. If you have been using our email module then the Company Email Information should already be filled out. If it is not field out you will need to enter your Outgoing SMTP, Account Name, and Account Password. You can typically get this information from either your IT or your email provider.
4. You will need to Paste the Company URL link that you copied onto a TXT or Word Doc. If you do not have your URL then go back up to Step #11 of Setup Employee Tech Bio Tab. You can use Control C to copy from whatever you saved it to and then put your cursor in the Company Logo URL and use Control V to paste. You will then need to put what email address you want the bio to send from and what Display Name you would like to come across on the email.
5. Then you will type in the Company Bio Text what you would like your customers to know about your company.
6. You can then decide whether or not you want to show the customer the estimated arrival time. If you do place a check mark in the box. If you do not then leave unchecked.

Your Tech Bio Feature is now setup and ready to use. If you have any questions or need further assistance with the above please don't hesitate to contact your support representative for assistance.

See Next Page for Utilizing Tech Bio once setup.

Utilizing Tech Bio

1. Verify the Acowin User who will be utilizing the Tech Bio has an email address in their Acowin Employee File (See Below)

Employee Information

First: Michele Init. Last: Thompson Emp Num: 00002 [request](#)
 Name Code: MICHELE

Address 1: _____
 Address 2: _____
 City, ST, Zip: _____

General Info | Personal Info | Employee Bio

Employee Type: Dispatcher
 Hire Date: / /
 Termination Date: / /
 Phone: () -
 Cell Phone: () -
 Paging Carrier: _____
 Paging Number: _____
 Email: **michele@acowin.com**

Create Reminders: Contract Inspections
 Contract Invoices

Mapping Options: Begin Office Home
 End Office Home

Buttons: Time Cards, Tech, Dispatcher, Employee Info, Departments, Pay Rates, AcoTruck, Remote Tech, Leave, Password, Permissions

2. When you are wanting to send a tech bio for a callslip make sure the site email address is filled out on the callslip itself (See Below)

Call Slip

Site: 001005-0001
 Name: Crane, Rebecca
 Address: 1118 Se 12th Ave
 Apt C
 Cape Coral, FL 33909

Bill To: 001005
 Name: Rebecca, Crane
 Contact: Rebecca Crane
 Phone: () -
 (239) 263-6766
 Source: _____
 PO #: _____
 Email: **michele_thompson@earthlink.**
 Contract: _____

Problem Codes

Code	Problem Name	Est Time Req
RAI	Residential A/C Insp	

Total Est Insp/Prob Time: _____
 Adjusted Est Time: _____

Description: *** RAI-Residential A/C Insp ***

Site Notes: _____

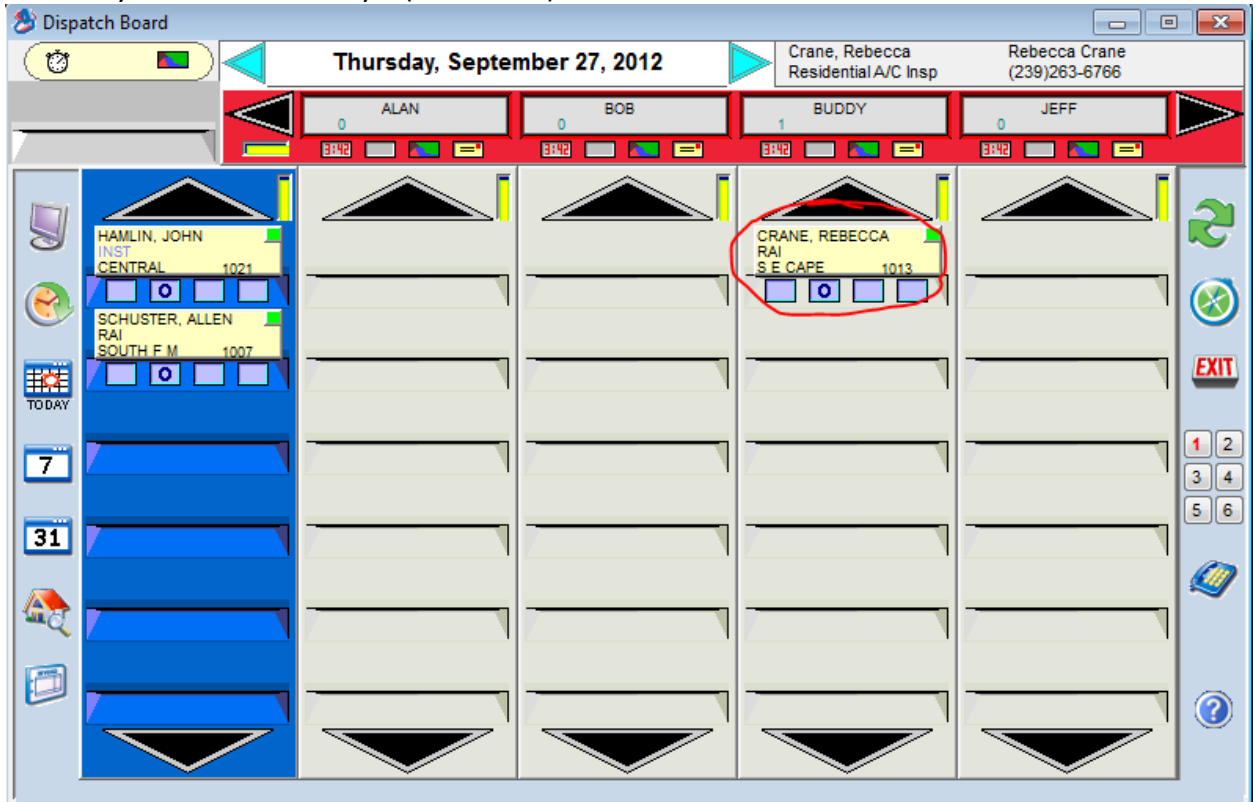
Call Slip: 1013 01/31/2012 03:47p
 Type: Call
 Status: SCHED Recent: 0 in 0 mth

Zone: S E Cape
 Priority: STANDARD
 Tech: ALAN
 Sched: 09/27/2012
 Range: / /

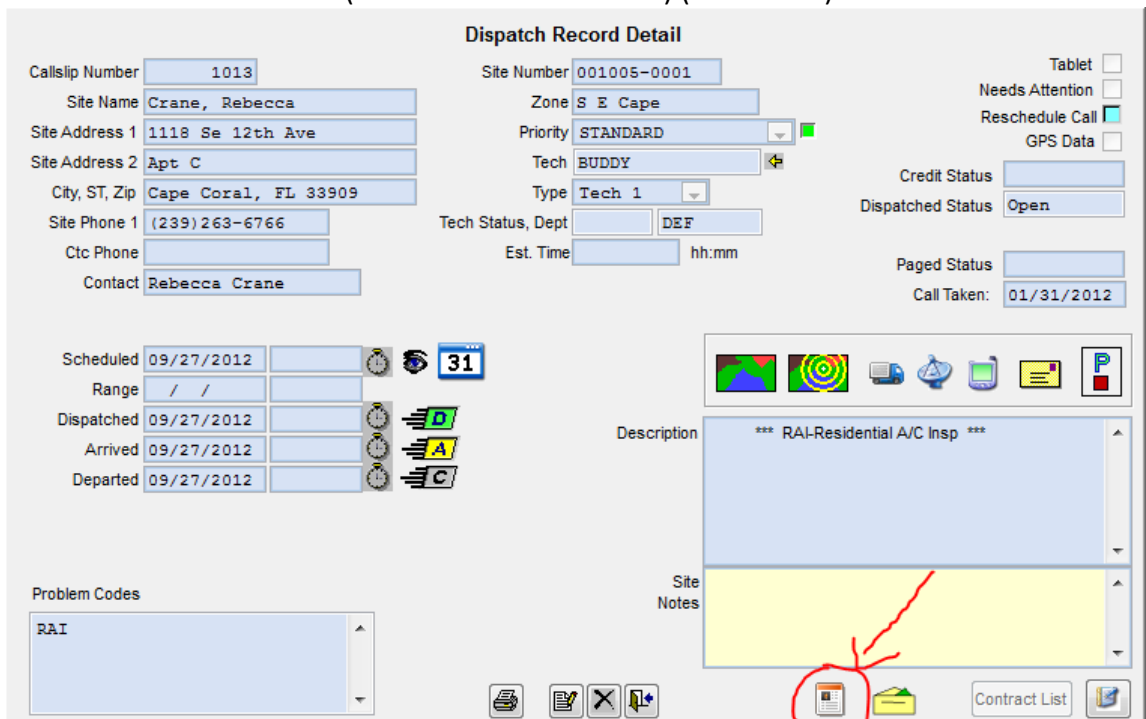
0 - 30	0.00
31 - 60	0.00
61 - 90	0.00
91 - 120	0.00
> 120	0.00
Total	0.00

Buttons: General, Times, Res Codes, Labor, Materials, Flat Rate, Invoice, Profitability, History, Status Change

- From the dispatch board right click on the callslip that is under the technician that you would like to send the tech bio for. In my example I am sending tech bio for CS# 1013 under my technician "Buddy". (See Below)



- Click on the Tech Bio Icon (See below circled in red) (See Below)



5. Once you have clicked the icon it will attempt to send email. You should receive a pop up that states Email Sent Successfully (See Below). If you receive error sending email please contact our support department for further assistance.

Dispatch Record Detail

Callslip Number	1013	Site Number	001005-0001	Tablet	<input type="checkbox"/>
Site Name	Crane, Rebecca	Zone	S E Cape	Needs Attention	<input type="checkbox"/>
Site Address 1	1118 Se 12th Ave	Priority	STANDARD	Reschedule Call	<input checked="" type="checkbox"/>
Site Address 2	Apt C	Tech	BUDDY	GPS Data	<input type="checkbox"/>
City, ST, Zip	Cape Coral, FL 33909	Type	Tech 1	Credit Status	
Site Phone 1	(239) 263-6766	Tech Status, Dept	DEF	Dispatched Status	Open
Ctc Phone		Est. Time	hh:mm	Paged Status	
Contact	Rebecca Crane			Call Taken:	01/31/2012

Scheduled	09/27/2012			
Range	/ /			
Dispatched	09/27/2012			
Arrived	09/27/2012			
Departed	09/27/2012			

Problem Codes

RAI

Description: *** RAI-Resid

Site Notes

Sending Email

Note: E-Mail send successfully

OK

Contract List