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

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. 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 Techinician 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

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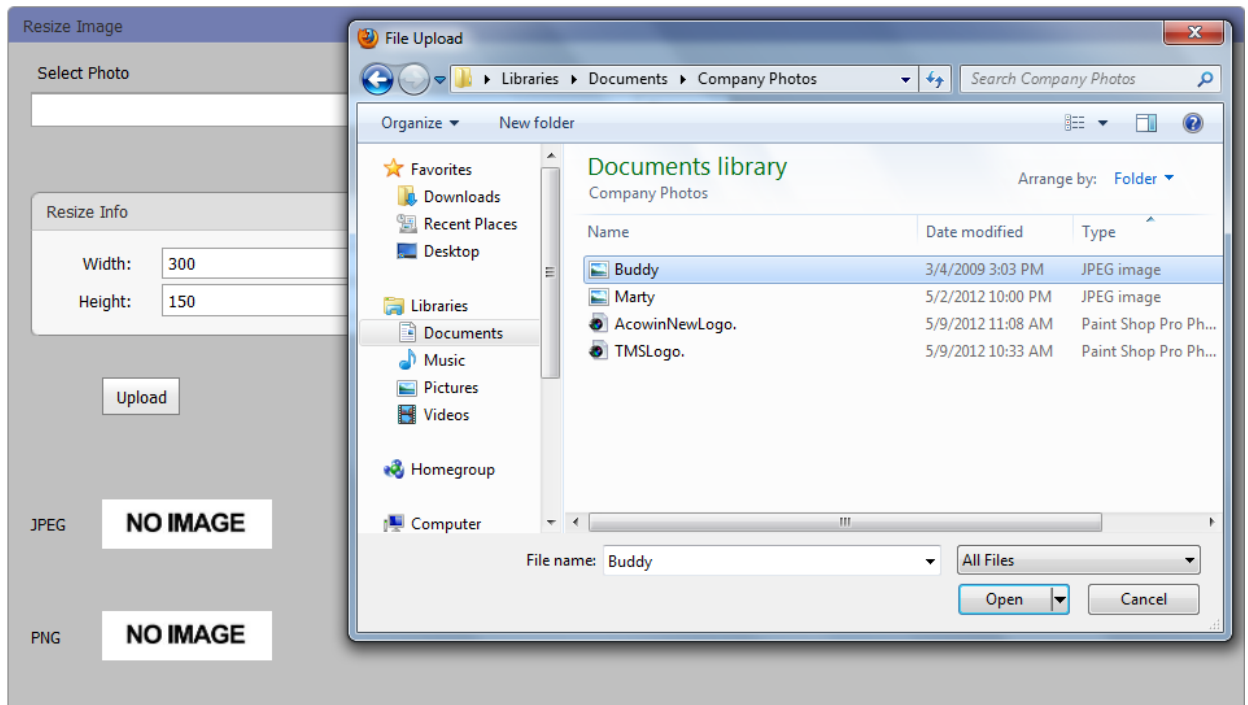
4. You will then see the file name of your photo under the select folder. If it is the company logo then the resize info is correct. If you are resizing a technician picture then you will need to adjust the width to 150 and the height to 250 by simply typing over the size that is currently in there.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

Resize Image	

Select Photo

Buddy.JPG	Browse...

Resize Info

Width: 150

Height: 250

Recommended Sizes:

Logo   W: 300, H: 150
Employee Bio   W: 150, H: 250

Upload

JPEG   NO IMAGE

PNG   NO IMAGE

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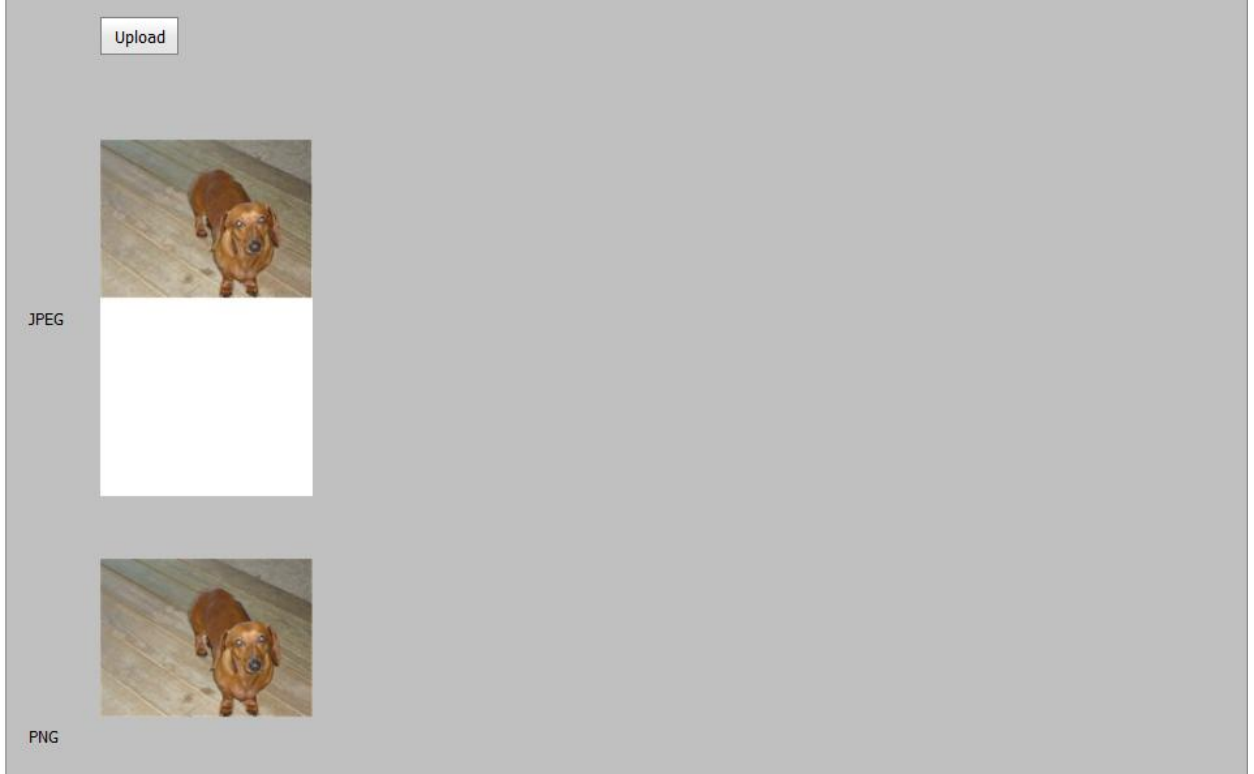
6. You will then see the Save Image option box pop up, I would suggest renaming the file name to the techs name and then resized behind it such as you see above I have Buddy_Resized, so you will know which image to choose when setting up each individual employee, and make sure you are saving it to the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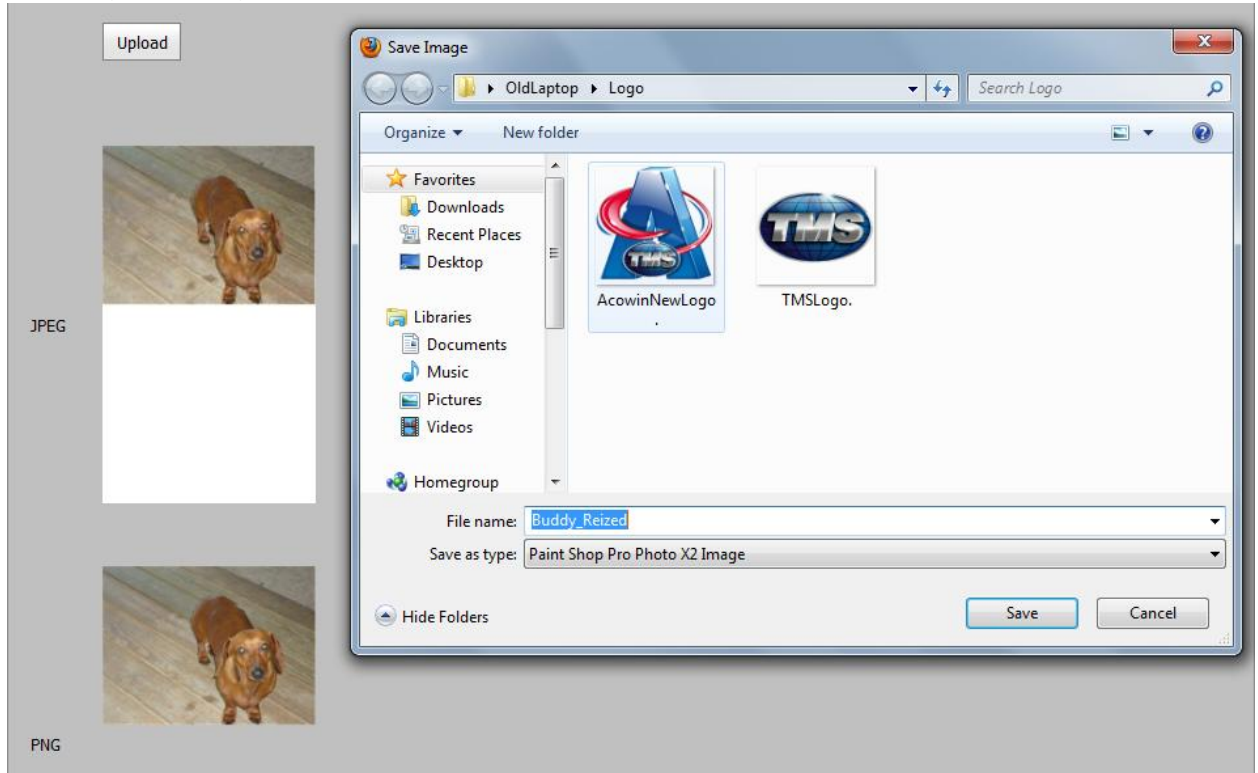
Setup Employee Tech Bio Tab

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)

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

Employee Information

First	Buddy	Init.	Last	Smith		Emp Num	00001	suggest

Address 1

Address 2

City, ST, Zip

Name Code BUDDY
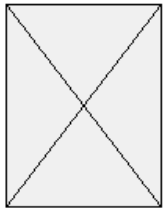
General Info	Personal Info	Employee Bio

DisplayName Buddy Smith

Biography Buddy Smith, a NATE Certified HVAC technician with our company, will soon be arriving at your requested location to meet your Comfort System repair needs. Biuddy has successfully completed extensive HVAC certifications and has passed all given motor vehicle, drug and background screenings. You can trust Bill 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 239-437-9411. We look forward to

Photo

Tech Pic URL

Upload

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 informatiion, 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)
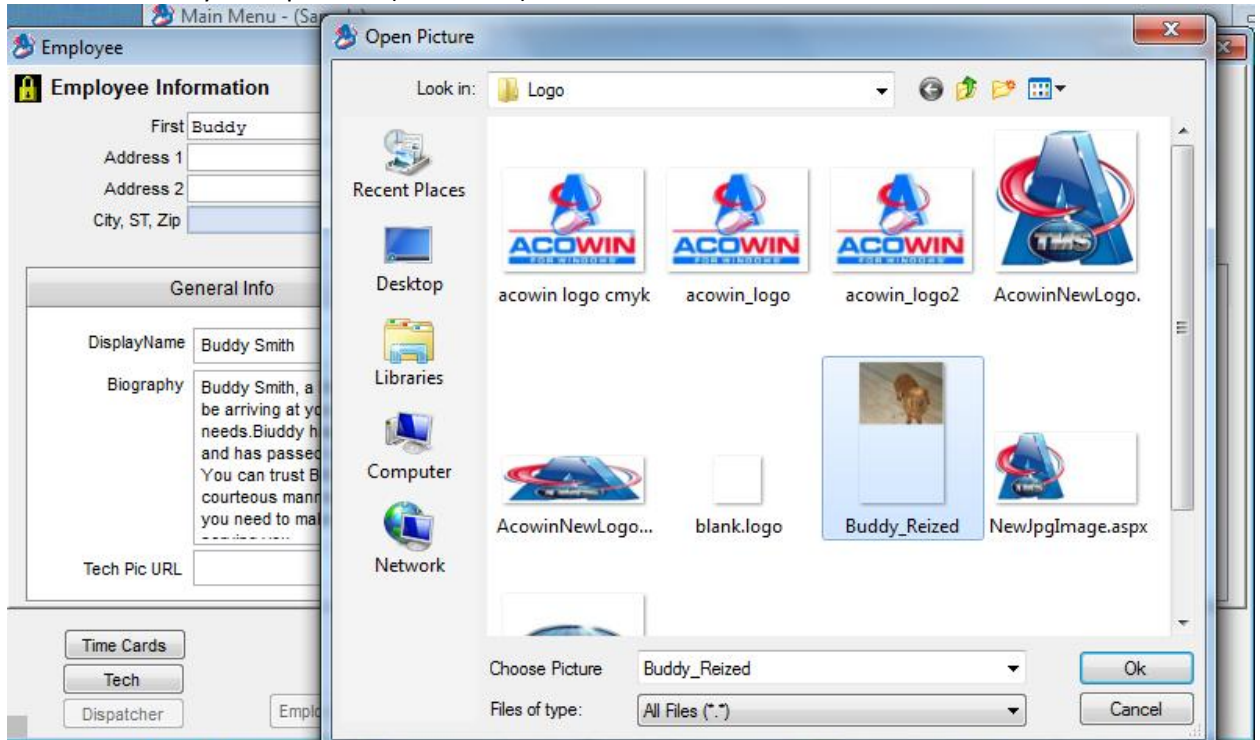
8. So now you should see the techs picture to the right and we have filled out the Tech Pic URL for you. Click Save. (See Below)
9. Repeat # 1-8 under Set up Employee Tech Bio until all of your technicians have been setup.
10. Next you will need to create a URL for your company logo so the Company Bio 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.

Setting up Company Bio

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

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)

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)

3. 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)
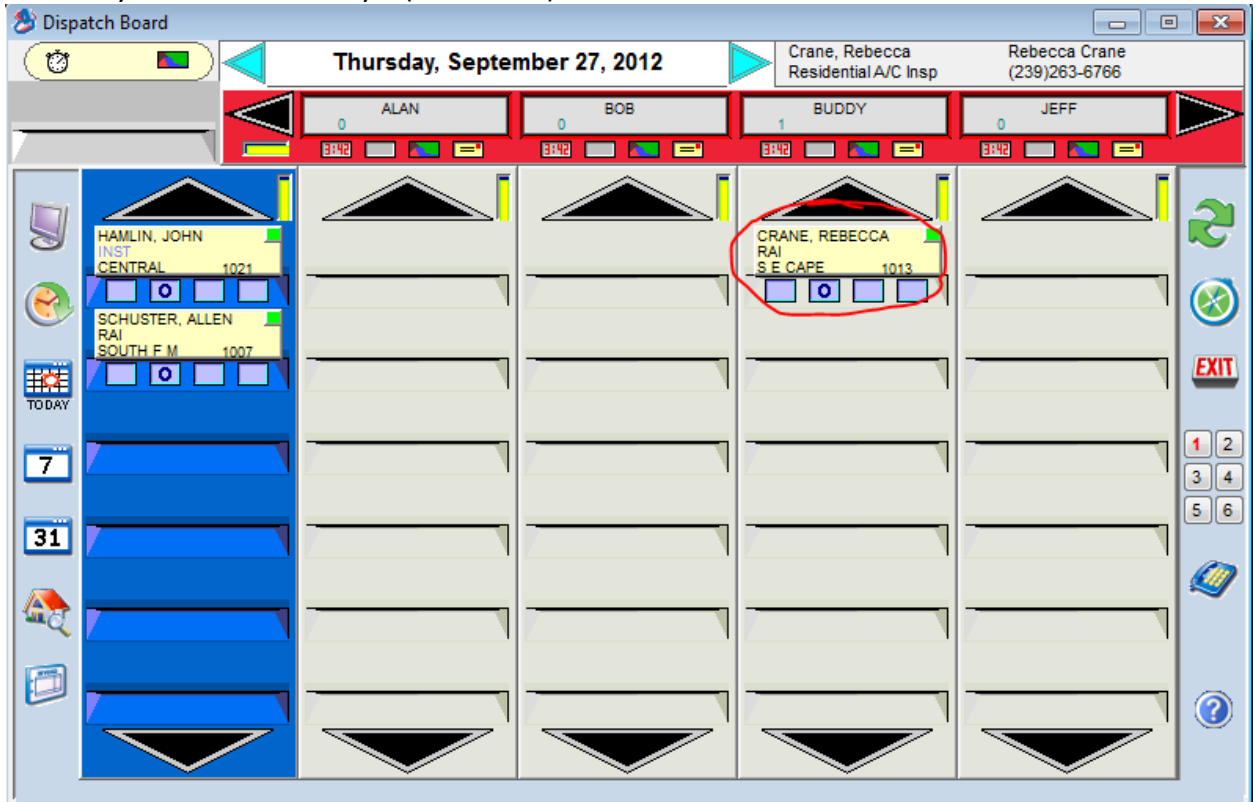
4. Click on the Tech Bio Icon (See below circled in red) (See Below)
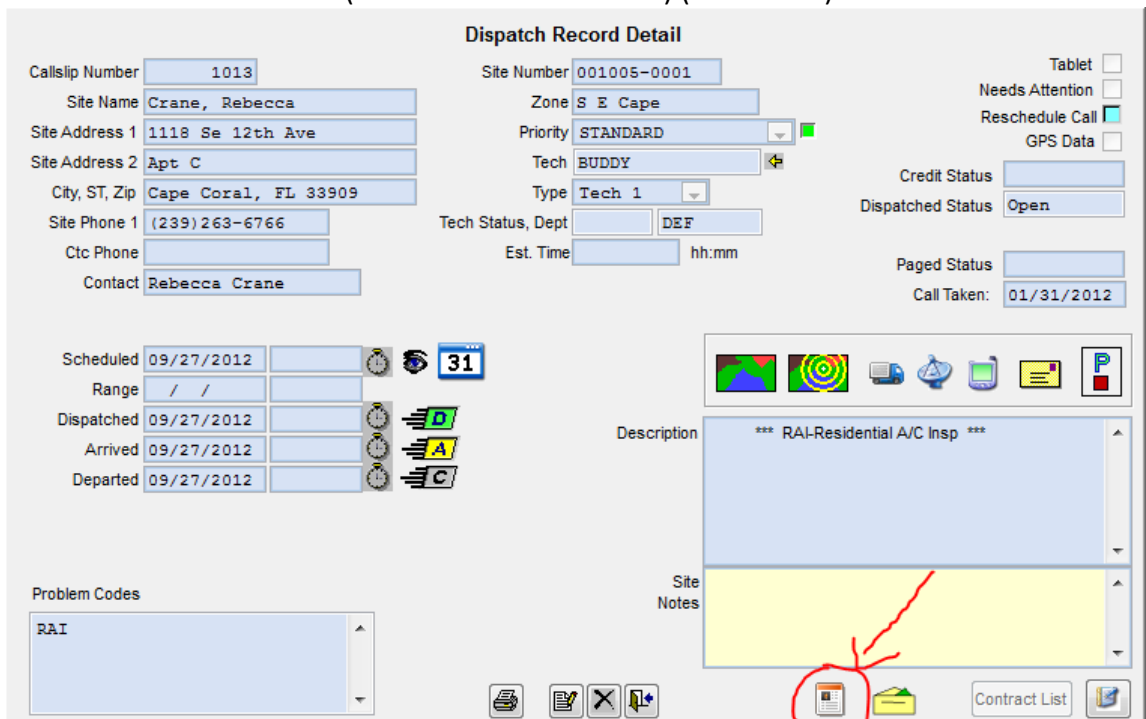
5. Once you have clicked the icon it will attempt to send email. You should receive a pop up that states Email Sent Successfully (See Below). If you receive error sending email please contact our support department for further assistance.