

Introduction to Acowin Intercall

(Available in Acowin Version 5.0 or Later)

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Introduction

Intercall (**Add on module**) - This module allows your customers to look themselves up in ACOWIN over the internet, select a specific site and view history, equipment and create a new service call. It also allows the customer to enter a preferred time of service (X date in the AM or PM). You can define at what time the current day is cut off from appearing on the list of preferred dates (in other words, no calls for today's date accepted after 11 AM). The system will allow the customer to enter their preferred scheduled date and time up to 7 days in advance and can skip holidays and weekends from being acceptable preferred dates.

Licensing your System for Acowin Intercall

When you purchase the Intercall option for your system, Team Management Systems will generate a license code that needs to be entered into the Acowin Registration program. If your server is connected to the Internet, you can simply download the license code(s) with the click of the mouse. If your server is NOT connected to the Internet, you can manually enter the licenses. (NOTE - If you can receive the license

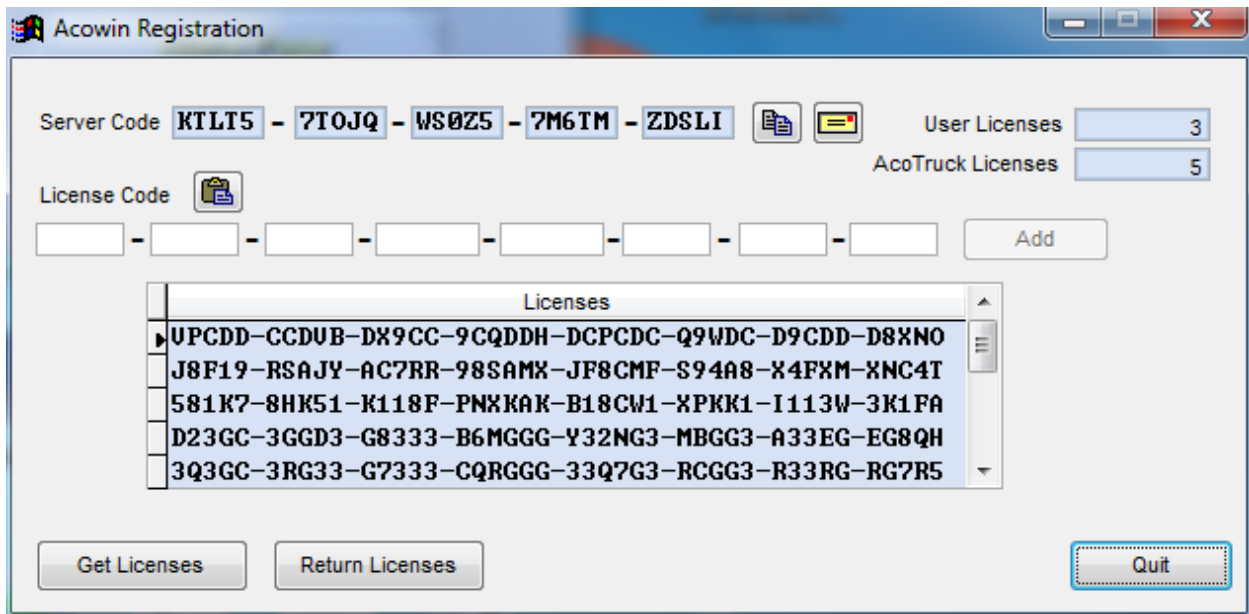
code email on your Acowin server computer, or can transfer the email to your server, you can copy and paste the code, instead of typing it out manually).

Importing ACOWIN Licenses Automatically

1. Make sure that everyone is logged out of ACOWIN and that you close the ACOWIN License Manager on your ACOWIN Server.
2. On the desktop of your Acowin server computer, double-click the **Acowin Quick Launch** icon. You can also click Start / Programs / Acowin / Acowin Quick Launch to run this program. The Quick Launch desktop icon is pictured below:



3. From the Quick Launch menu, choose **Registration**. The Registration screen is pictured below. Click the “Get Licenses” button on the bottom left hand side of the Registration Screen.



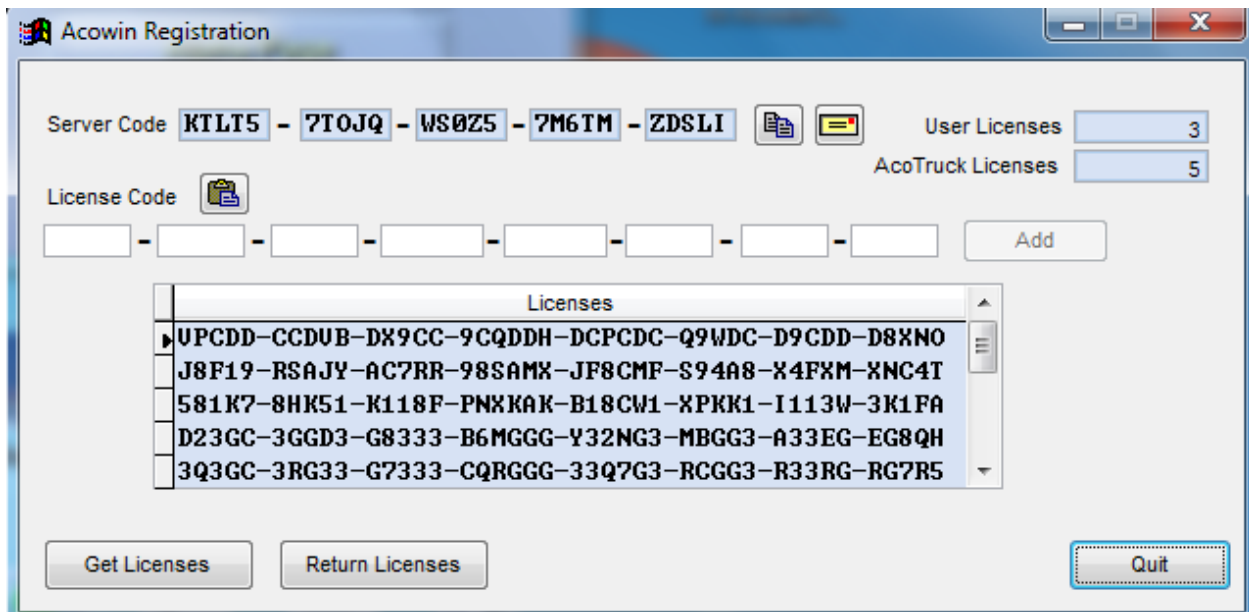
4. Click the Quit Button and start the ACOWIN License Manager and connect to QuickBooks if applicable.


Manually Entering ACOWIN Licenses

1. Make sure that everyone is logged out of ACOWIN and that you close the ACOWIN License Manager on your ACOWIN Server.
2. On the desktop of your Acowin server computer, double-click the **Acowin Quick Launch** icon. You can also click Start / Programs / Acowin / Acowin Quick Launch to run this program. The Quick Launch desktop icon is pictured below:



3. From the Quick Launch menu, choose **Registration**. The Registration screen is pictured below. The new license code should be entered into the white fields in the middle of the screen, then click the **Add** button. However, if you have the license code email open on your screen, in addition to the Registration program, you can copy and paste that code instead of typing it longhand, as described below.



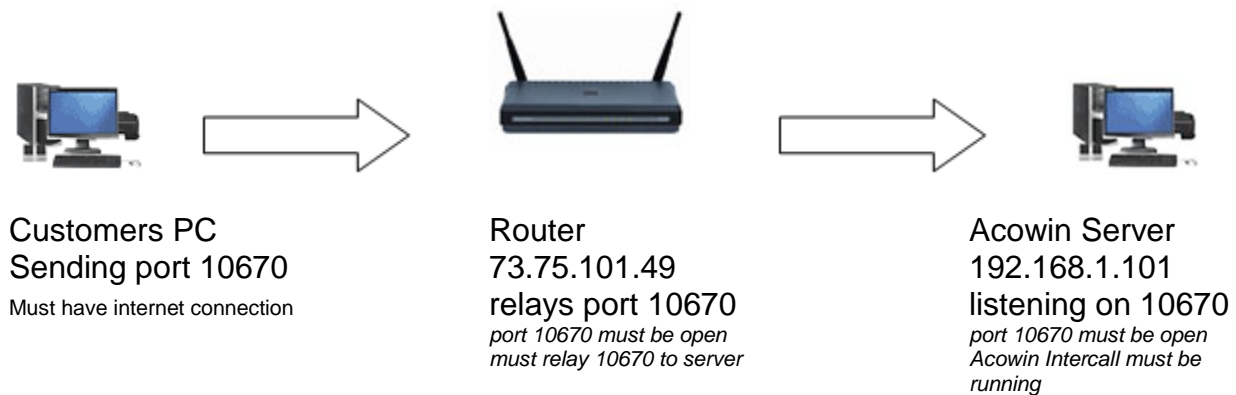
4. To copy the license code from the Team Management Systems email, use your mouse to *highlight* the license code. That is, hold down the left mouse button and drag the mouse pointer across the code, causing it to turn blue. Once the code is highlighted, RIGHT-click on the code and choose Copy from the menu that appears. You can also touch Control + C to copy the code.
5. In the Registration program, click the Paste From Clipboard button, located next to the words "License Code" on the screen. The copied code will appear in the white fields. Click **Add** to finish adding this code to your system. The Paste From Clipboard button looks like this: 

- Click the Quit Button and start the ACOWIN License Manager and connect to QuickBooks if applicable.

Forwarding TCP Port for Intercall Access

Since the Customers Computers will be operating outside your network they will be accessing the proper Web Address via your “outside” or “public” address of your network. If you don’t already know this address, you can go to this web site from any computer inside your network: www.whatismyip.com. The web site will show you the outside IP address of your network. This address will typically be a “Static IP address” that you get from your Internet Service Provider, which is a permanent address that is assigned specifically to your company.

The TCP port 10670 is used by Acowin Intercall when the Customer accesses your Acowin server across the Internet. Make sure this TCP port is open in all firewall and security software running on your network and that it is Forwarded (in the Router) to the Internal IP address of your server. **NOTE:** You MUST forward TCP port 10670 from the router, to your server, or the Customers will not be able to communicate with the server correctly. The line of communication from the Customers Computer to the server looks like this:

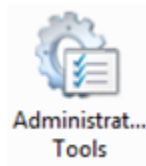


The Acowin Intercall Service

Every Windows computer has a number of “services” running in the background. These are programs that run all the time, in a very quiet way - they don’t produce desktop or taskbar icons, or produce visible output. The Acowin server computer has a special process called **Acowin Intercall**, which allows the Customers Computers to communicate with the main server. This service is installed automatically with the Acowin server software, but is left in a dormant state, since Acowin users who don’t have Intercall don’t need it. In order for Intercall to work properly, you must **start** the Acowin Intercall service on your Acowin server computer. This is very easy to do, and you only need to do it once - after you start the service, it should continue running

indefinitely until you shut down your server. If you do shut down your server, you will need to restart the Acowin Intercall service before your Customers Computers will be able to communicate.

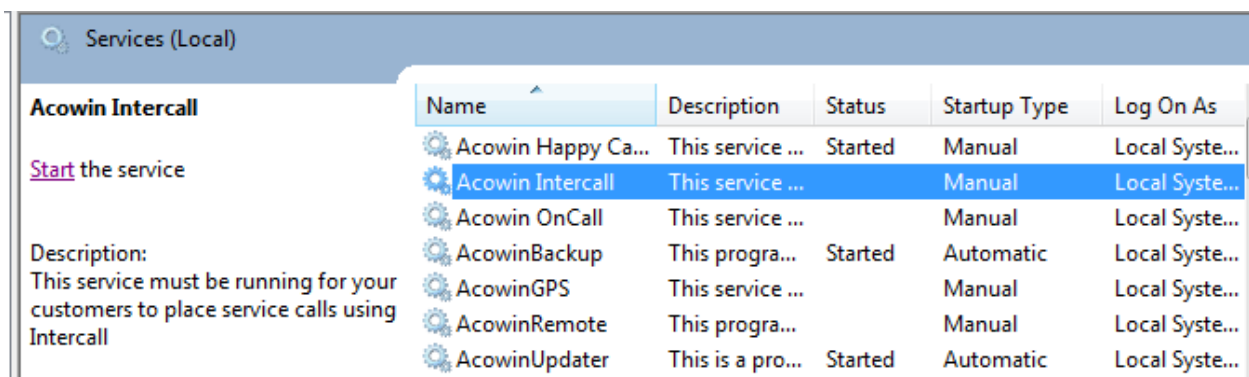
1. Open the Windows Control Panel, by clicking **Start / Control Panel**. (In some versions of Windows, the Control Panel is on a Settings sub-menu, so you open it by clicking Start / Settings / Control Panel.)
2. In the Control Panel window, double-click the **Administrative Tools** icon, pictured below. (Note: this is the Windows Vista version of the icon - it may appear slightly different in other versions of Windows.)



3. In the Administrative Tools window, double-click the **Services** icon. The Windows Vista version of this icon is pictured below.



4. A list of services will appear. Very near the top, you'll see the entry for **Acowin Intercall**. Click this entry, and then click the hyperlink to Start the service. The system will notify you when the service has been started successfully - it can take a few moments. When the service has started, you can close the Control Panel windows. Your server should now be ready to communicate with the Customers Computers. NOTE – The Acowin Intercall service must always be running for the Customers Computers to communicate with your ACOWIN server.



Setting up Intercall within Acowin

You can define at what time that they current day is cut off from appearing on the list of preferred dates (in other words, no calls for today's date accepted after 11 AM). The system will allow the customer to enter their preferred scheduled date and time up to 7 days in advance and can skip holidays and weekends from being acceptable preferred dates. For the Holidays, you would need to create the holiday calendar in the System Setup.

Creating "Intercall" Technician

It is suggested that you create an employee in your Acowin File named "Intercall" and add that technicians to your dispatch board. By creating this employee when a Customer submits a request the call slip will be created in Acowin and will show up under the "Intercall" technician on the dispatch board letting the dispatcher know it was placed via Intercall.

To create the "Intercall" Technicians click on the Employee Icon from main menu and then select new. Enter a first name/last name/employee number (click blue suggested link and Acowin will create one for you)/name code (this is how the tech name will show up on the top of dispatch board), and select an employee type of Technician then click save and exit.

The screenshot shows the 'Employee Information' form in the Acowin system. The form is titled 'Employee Information' and has a window title 'Employee'. It contains several input fields and sections:

- Employee Information:** Fields for First Name (Intercall), Last Name (Intercall), Emp Num (00006), and Name Code (INTERCALL). There are also fields for Address 1, Address 2, and City, ST, Zip.
- General Info:** Fields for Employee Type (Technician), Hire Date, Termination Date, Phone, Cell Phone, Paging Carrier, Paging Number, and Email.
- Mapping Options:** Radio buttons for Begin (Office, Home) and End (Office, Home).
- Create Reminders:** Checkboxes for Contract Inspections, Contract Invoices, and On Call Zip Codes.
- Navigation and Tools:** Buttons for Time Cards, JC Time Cards, Tech, Dispatcher, Employee Info, Departments, Pay Rates, AcoTruck, Remote Tech, Leave, Password, and Permissions. There are also navigation arrows and a help icon.

Above is Example of what your "Intercall" Technician should look like within the Employee File of Acowin

Adding “Intercall” Technician to your Dispatch Board

Select Dispatch Board icon from the Main Menu of Acowin. You can add the “Intercall” technician to your Dispatch Board by *right-clicking* on the Dispatch Group buttons, a cluster of six buttons on the right side of the Dispatch Board. NOTE: Adjusting the Dispatch Group is per User Login. When you change the user group with your user log in it does not change it globally. Each Acowin User will have to add the “Intercall” Technician to their dispatch board.




Right-click on a Dispatch Group button to configure the group. Group #1 is your standard or “default” group.

Chk	Tech Name
<input checked="" type="checkbox"/>	BILL
<input checked="" type="checkbox"/>	CPMA
<input type="checkbox"/>	GUEST
<input checked="" type="checkbox"/>	INCOMPLETE
<input checked="" type="checkbox"/>	INTERCALL
<input checked="" type="checkbox"/>	PARTS
<input checked="" type="checkbox"/>	RPMA
<input type="checkbox"/>	
<input type="checkbox"/>	

INTERCALL
BILL
INCOMPLETE
PARTS
RPMA
CPMA

Move Up
Move Down

This is the screen that appears when you right-click a Dispatch Group button. The column on the left has a check mark for each technician who appears on the Dispatch Board as part of the Group. The column on the right controls the order in which the selected technicians will appear.

 Click the Edit button to make changes to the Group configuration. After you click Edit, you can add a check mark for the “Intercall” technician in the left column and it will add him to the dispatch board. You can click on a the “Intercall” technician’s name in the right column, then use the Move Up or Move Down buttons, to change his position in the list of selected technicians. The top name in the right column will be the technician in the first column of the Dispatch Board.

 Click the Save button to save your changes after you modify a Dispatch Group.

Intercall Company Setup



To designate what days, times, and website text you would like to appear on the Intercall Link go to Company Setup / Settings / Intercall Setup.

Days of Operation

Mon	Tue	Wed	Thu	Fri	Sat	Sun
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Place a check mark in the Days of Operation that you want to allow Customers to enter Service Calls for. For Instance, you may not want a Customer to be able to schedule a Service Call for

Saturday and Sunday, therefore, you will only place a check mark in the boxes next to Monday through Friday.

Tech:

Click on the drop down for Tech and select the "Intercall" Technician you created earlier in this document.

AM Time:
PM Time:

Type in your beginning time that you would consider an AM Service Call, then type in your beginning time that you consider a PM Service Call.

Stop Accepting Calls For Today At:

Type in the time that you Stop Accepting Calls for the day. By entering this time of

11:00am if a Customer enters a Service Call at 12:00pm it will not allow them to select the current day as a schedule date.

You can then type in the Website Text you would like for the Customer to see when they select the Submit Query Button to enter a Service Call. It is very important as you see below that you do not hit enter to break up your paragraphs. Anywhere that you would like to hit enter to create a new line click on the Insert Break blue hyperlink. When you click on that link you will see
 and then you can continue typing. That break will indicate on the Website that you want the text following the
 to start a new line. Below is an Example Website Text it can say whatever your Company deems necessary.

Website Text:

For a better understanding of how the Insert Break works I have included a screenshot below of what the Website text that is typed above will look like in Intercall.

Acowin HVAC

Site Name: Miller, Stephanie
Site Address: 9371 Cypress Lake Drive
Houston, TX 77092

Phone (281)437-3030

Contact

PO#:

Thank you for placing your service call over the internet today.

By placing your service call over the internet this does not guarantee a same day appointment.

Once you submit the service request it will notify the customer service representatives. The next available customer representative will contact you with the expected date and time of your service call.

If you have any question regarding a service call you placed or need cancel a service call please contact our offices anytime between 8am and 5pm Central Time and we will be more than happy to assist you with your needs.

Once you have completed entering your Website Text you simply click Apply and can then close out of the setup.

Options for Access to Intercall Website

There are many options as to how you would like your Customers to Access the Intercall Page via their Computers. You can provide your Customer the Direct Web Link to the Intercall, have your Web Designer create a web address such as www.companyname.com/servicecall that is directed to the Intercall Direct Web Link, or have your Web Designer add a link to your Existing Company Website that the Customers can click on that will send them to the Direct Web Link for Intercall.

To determine what the Direct Web Link is going to be you will need 2 things. You will need to know the Static IP Address for your network and the Company ID for the Acowin Company that you want your Customers to have access to.

To determine your Static IP simply go to the internet on any office company on the internal network and go to www.whatismyip.com. The IP Address that it will show is the Static IP you will need.

To determine your Company ID simply log into your "Live" Acowin Company that you use on a daily bases. You can then click on the Employee File icon on the main menu and then select the AcoTruck tab. You will see a field called Company ID. That is the Company ID number you will need to create your Direct Web Link to Intercall.

Now that you have those 2 items you can combine them like the example below. For the sake of an example in this document the Static IP is 74.196.229.108 and the Company ID is 4 (you will need to use your real information).

So with the example numbers given above the Direct Web Link for Intercall would be

<http://74.196.229.108:10670/?c=4>

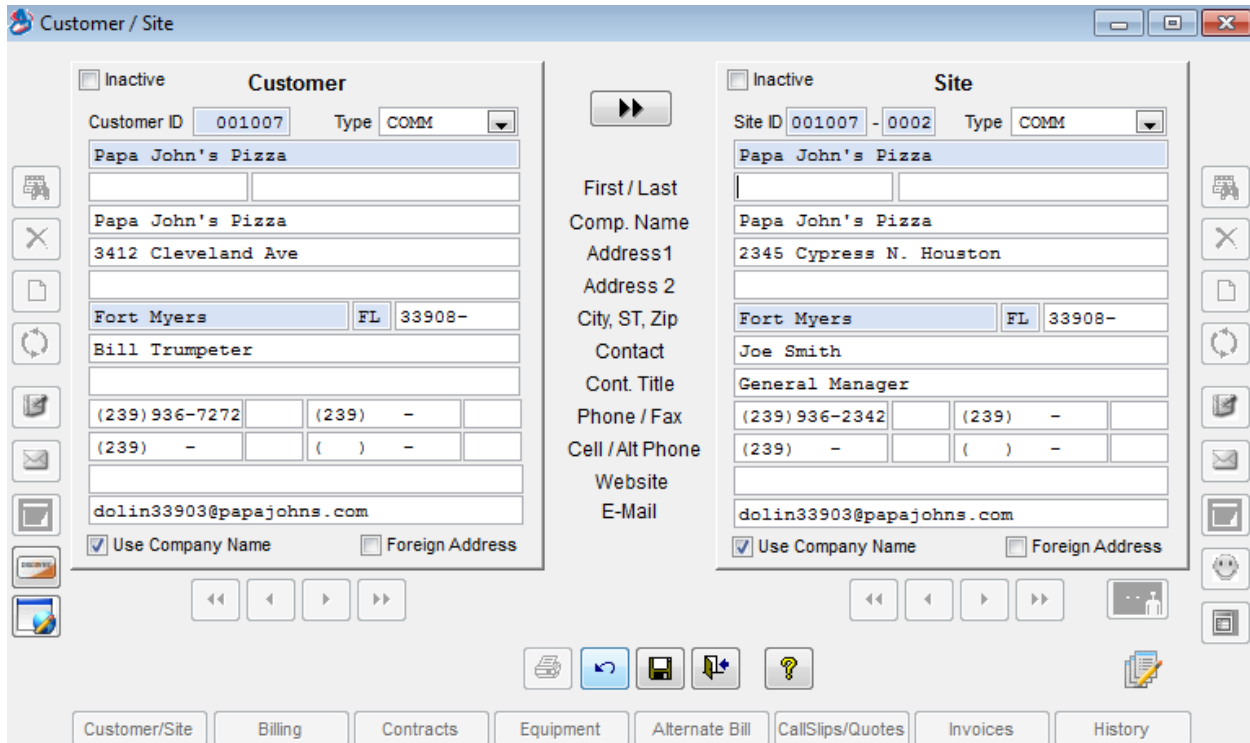
Once you determine the Direct Web Link for your Company we suggest you relay this to your Web Designer so that he or she can add it to your Existing Company Website in an easy location for the Customer to find.

Setting Up Customer to Allow Access to Intercall

None of your Customers will have access to the Intercall feature until you designate in their Customer/Site File that they are allowed access. Acowin recommends that you only provide Intercall Access to Special Customers. Such as someone who has one of your Premium Service Contract Plans (good selling point to upgrade them from a basic plan) or a Customer who does a high volume of Service Calls with you.

In order to set a Customer for Access to Intercall pull up the Customer/Site Center on the Main Menu of Acowin.

You will search for the Customer that you would like to provide access. Once on their Customer File click edit. Once you click edit you will notice an Intercall Icon on the Customer side of the Screen.



Example: Once you click edit on a Customer/Site File the Intercall Icon will show up it will be last icon on the Customer Side (Left).

Once you have clicked edit select the Intercall Icon. You will then see a pop up prompting for a Username and Password. You can then designate a Username and Password for the Customer. There are no special criterias that have to be followed for the Username and Password. If it is a Commercial Account you may want to use the primary email address. If it is a Residential Customer you may want to just use their First Initial Last Name as there log in. It is completely up to you as a Company how you setup the Login and Password. The recommendation is whatever you do try to make it uniform for all Customers that you setup in the system. Once you have designated a Username and Password for that Customer click Ok and then save. You can now provide that username and password for you customer to log in and place a Service Request through Intercall.

Intercall Credentials

Login:

Password:

Once you click on the Intercall Icon on the Customer side of the Customer/Site Filer the above screen will pop up. Simply enter a Login and Password for the Customer and click Ok then Save. You will then need to provide that log in information to your Customer for them to access Intercall.

Customers View of Intercall

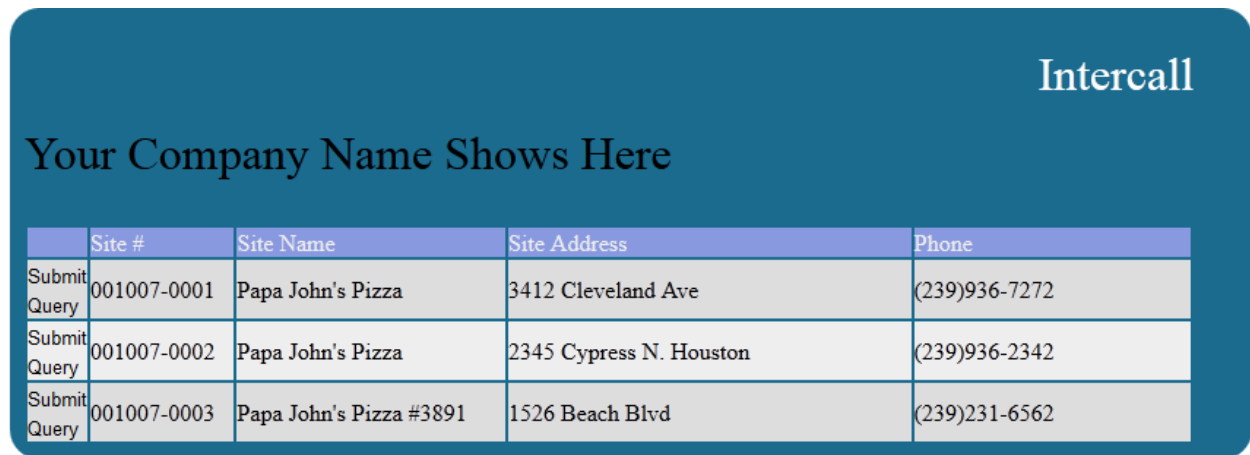
When Customers access Intercall via the internet they will be prompted to enter their Login and Password and then they will click Submit.



The image shows a login screen for Intercall. It has a dark blue background with the word "Intercall" in white at the top right. Below that, the text "Your Company Name Shows Here" is displayed. There are two input fields: "Login:" followed by a white text box, and "Password:" followed by a white text box. Below the password field is a "Submit" button.

Above is the Intercall Login Screen the Customer will see whether you put a link on your website for Intercall or give them the direct Internet Link.

Once they select submit they will then see a list of all site locations associated with that Login and Password. The Customer should then click on Submit Query next to the Site Location they need service for.



The image shows a list of site locations in a table format. The table has a dark blue header with the word "Intercall" in white at the top right. Below that, the text "Your Company Name Shows Here" is displayed. The table has five columns: "Submit Query", "Site #", "Site Name", "Site Address", and "Phone".

	Site #	Site Name	Site Address	Phone
Submit Query	001007-0001	Papa John's Pizza	3412 Cleveland Ave	(239)936-7272
Submit Query	001007-0002	Papa John's Pizza	2345 Cypress N. Houston	(239)936-2342
Submit Query	001007-0003	Papa John's Pizza #3891	1526 Beach Blvd	(239)231-6562

Above is Example of all Sites associated with the Customer that logged into Intercall.

Once the Customer selects Submit Query next to the proper location then they can see all call slips that are associated to that specific site location. If they need to return back to all of the site locations then they can select the site location button found in the bottom left of the screen.

Your Company Name Shows Here

Site No: 001007-0002
 Site Name: Papa John's Pizza
 Site Address: 2345 Cypress N. Houston
 Fort Myers, FL 33908

Phone: (239)936-2342

	CS#	Contact	Date	Tech	Status	Problem
Submit Query	5112	Bill Trumpeter	01/30/13		UNSCHD	Install
Submit Query	5053	Joe Smith	07/10/12	BILL	A/R	No Cooling
Submit Query	5028	Joe Smith	04/11/12	BILL	LAB	No Cooling
Submit Query	5015	Joe Smith	03/12/12	BILL	A/R	No Cooling

Site List

Add Call Slip

Above is Example of all Call Slips associated with the specific site location the Customer selected

If the Customer would like to see the history for a particular call slips they can click on the Submit Query next to the call slip number they would like to view and it will then show the history for that particular call slip. The history that shows up for the customer is what is on the Call Slip Invoice Screen in Acowin. It does not show the Res Codes screen of the Call Slip in Acowin. If they are in the history screen and they would like to go back to the list of call slips for that site they need to click on the Site Menu button in the bottom left hand corner.

Site Name: Papa John's Pizza
Site Address: 2345 Cypress N. Houston
Fort Myers, FL 33908

Call Slip #: 5053
Status: A/R

Sched Date: 07/10/12
Sched Time: 08:37a
Tech: BILL

Contact: Joe Smith
Phone: (239)936-2342
PO #: 123123

Subject: No Cooling

Resolution: Problem Reported:
*** NC-No Cooling ***

Minimum Charge for 1st 1.00 hour(s) 125.00

Tech	Date	Hours	Rate	Amount
BILL	07/10/2012	0.8833	TT hours @ 125.00	110.41
BILL	07/10/2012	1.5000	RT hours @ 125.00	187.50

Qty	Material	Unit	Price	Amount
(1)	Motor		139.50	139.50
(1)	Capacitor		32.40	32.40

Equipment:

Unit : Condenser Model : RTCH060
Brand: Ruud Serial#: 13351SF

Found capacitor to be defective. Replaced capacitor and tested system to verify proper operation. Defective condenser fan motor was removed and new condenser fan motor installed. Motor mounted into proper position & checked for alignment. Motor run tested & setup for normal operation.

Above is example of what history a Customer will see when they click on the Submit Query next to a specific Call Slip number

If the Customer would like to place a service call for a particular site they will need to click the Add Service Call button at the bottom of the Site Menu page. If they are currently in the history section of a particular call slip they will need to click the Site Menu button found in bottom left hand side of screen.

Once they select the Add Service Call Button then it will pull up form for them to change the phone number and contact that is automatically populated if needed. It will also allow them to enter a PO# number if required (If you have it set in Acowin that the site location requires a PO# it will not let the Customer submit the Service Request without one. The can then select their preferred time, problem code, and enter any additional

notes they would like to add. Once they have entered the appropriate information then they will click Submit.

Your Company Name Shows Here

Site Name: Papa John's Pizza	Phone: (239)936-2342
Site Address: 2345 Cypress N. Houston Fort Myers, FL 33908	Contact: Joe Smith
	PO#: [Redacted]

Thank you for placing your service call over the internet today.

By placing your service call over the internet this does not guarantee a same day appointment.

Once you submit the service request it will notify the customer service representatives. The next available customer representative will contact you with the expected date and time of your service call.

If you have any question regarding a service call you placed or need cancel a service call please contact our offices anytime between 8am and 5pm Central Time and we will be more than happy to assist you with your needs.

Preferred Time:

Problem Code:

Additional Notes:

Above is Example of the Form the Customer will fill out to Request Service through Intercall. Once they have filled out appropriate information then they will need to click Submit. NOTE: Submitting a call can take a few moments. It states at bottom to ask them to please be patient and to refrain from refreshing web browser or clicking the back button.

Once they click submit and it is completed with processing it will let them know their call slip has been submitted and provide them with the call slip number. We provide them with the call slip number in case the customer needs to contact the office to check on the status of the service request or cancel the service request.

Your Company Name Shows Here

Site Name: Papa John's Pizza
Site Address: 2345 Cypress N. Houston
Fort Myers, FL 33908

Your call slip has been submitted:

Call Slip #5146

Site Menu

Above is Example of what screen the Customer will see once they hit Submit on their Service Request

Once the customer receives the above screen then you should see the corresponding Call Slip on your dispatch board under the "Intercall" Technician you created and put on your dispatch board earlier on in this document. The customer can either close the web browser when complete or click on Site Menu and then Site List to locate another location that they may need to enter a Service Request for as well.