

How to get started

First morning. Then the truck. Office is the desk. Field is the phone. Same calls.

- 1 Open a shop.** Go to techtrax.app and choose Open a shop. Shop name, your name, your mobile, shop email, a password of at least 8 characters, and a 4-digit office PIN. Not 0000 or 9999. Trade can wait. Under your mobile, check the box to receive operational texts from TechTrax. Choose Text me a code, then enter the 6-digit code. It expires in 10 minutes. Reply STOP to end those texts. One mobile opens one shop. Fourteen-day trial, then \$99 a month for up to 8 people, not per truck. The board starts empty.
- 2 Sign in once on each device.** Shop email and password the first time on that computer or phone. After that, Office and Field open with a PIN. Office uses the office PIN, or the PIN of a person who can open the desk.
- 3 Set the shop.** Office → Settings → Company. Address and phone. Under How you work, pick Commercial or Residential. New accounts start as that mix. One account can still be Business or House. Leave “Techs can close calls” off if the desk prices parts. Turn it on if the person on the truck also closes.
- 4 Add the crew.** Settings → Crew. Name and a 4-digit PIN for each person. Field, Office, or both. Up to 8 people.
- 5 Add a customer and a site.** Customers → New customer. Name or company, phone, and the street. The site is where the truck goes. A house is usually labeled Home.
- 6 Book the first call.** Today → Add a call. What’s wrong, the day, the window, and who’s going. Who can wait. Use Quote only when they have not said yes. A yes becomes a stop. A no stays off Today.
- 7 Open Field on the phone.** Sign in once with the shop email on that phone, then open Field. The tech picks their name and enters their PIN. Today’s stops are the list. The phone’s browser is enough: Chrome on Android, Safari on iPhone.
- 8 Close from the call.** En route, on site, clock in. Tap Talk and say what you did and the hours. If the mic misses, paste a recap. Add a photo if you want. If techs can close calls, the customer signs and you close the call. If they cannot, choose Send to office. The desk prices the parts and closes the bill.