

The day, the truck, the bill.

Office is Today, Customers, and Books. Field is a name and a PIN. Same calls. HVAC, refrigeration, plumbing, electrical.

Sign in and PINs

Shop email and password once on a device. After that, a PIN opens Office or Field. The office PIN opens the desk. A person in Crew who can open Office can use their own PIN. Field uses that person's PIN and shows their today. PINs are 4 digits. Not 0000 or 9999. The first morning, including the text box under your mobile, is in How to get started.

Today

One day. Add a call for what's wrong, the day, and the window. Who can wait. Quote only when they have not said yes. A yes becomes a stop. Send a truck is that yes, already priced. A no stays off Today.

Customers, sites, equipment

An account is Business or House. A site is where the truck goes. Open the site for equipment, jobs, and closed visits. Add a unit with a tag, model, and serial. A house and a business use the same list. The next call already knows the unit.

Jobs and calls

A call is one visit, with a date and a window. A job holds the visits, the hours, the parts, and the profit. Calls are suffixes on the job number. Printed numbers stay.

Field

The tech picks their name, enters a PIN, and sees today's stops. En route, on site, and clock in tell the office where the day stands. Clock out shows the hours. Call the site, add a photo, and add a helper on the call. The phone's browser is enough: Chrome on Android, Safari on iPhone.

Talk to close

Tap Talk. Say what you did and the hours. The call is written. If the mic misses, paste a recap. Close still works. On an iPhone, open Field in Safari if Chrome cannot hear the mic. With "Techs can close calls" off, choose Send to office. The desk prices the parts and closes. With it on, fix the invoice, have them sign, then close. The customer's copy shows the price. Shop cost stays on the office bill.

Texts

Text from the call: confirm the window, say you are on the way, send the quote, send the bill, reply, or ask for a review once after close. On the way is there when the status is en route. The thread stays on the call. Texting and Card Payments turns on the shop's number. Until then, the phone's own messages open. Reply STOP ends TechTrax texts to the person who opened the shop.

The bill and Books

Hours and parts are already on the call. Print it or email it. Collect now or on account. Collect-now customers should be cash, check, or card before a push. On account stays an open invoice. Books lists what still needs QuickBooks Online, and what is already there.

Accounting

Settings → Accounting. Save the QuickBooks Online app keys, then Connect. Closed bills push there. One combined tax rate per place. Do not add state, city, and district as separate lines. QuickBooks splits those

when you push the invoice. Payroll stays in QuickBooks.

Settings

Company is the name, the address, Commercial or Residential, the login email, and the office PIN. Work types are the trades and the rates. Terms are collect now and net. Numbers are the next job and the next invoice. Crew is who is on the truck and who can open Office. Up to 8 people. Billing is \$99 a month for the shop. Texting and Card Payments is \$29 a month on the same card. A failed card or a cancel locks Office and Field.

Backup

Settings → Download .trax saves the board. Restore replaces the board from that file. The Elite Mechanical demo does not bill and cannot be copied.

When something breaks

Office → Settings → Support, or support@techtrax.app. Include the shop name and whether it was Field PIN, Office, billing, or a call. We answer in one business day. Not 24/7.

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