

TMS Flat Rate Reader Installation & Setup Guide

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Introduction

The Flat Rate Reader allows a technician in the field to use an iPhone, iPad or iPod Touch to look up their Flat Rate Repairs, select recommended repairs and generate a quotation for the customer. The customer can accept or decline each repair and sign the device acknowledging their decision. If your company is using the TMS ACOTRUCK Mobile Work Order system, the repairs selected can be copied to the clipboard and easily pasted into the Flat Rate Section of ACOTRUCK.

The Flat Rate Reader program on the iPad, iPhone or iPod Touch will need to communicate to a program called “TMS Flat Rate Reader”, which will be loaded on one of the computers at the office, via the Internet or a Wireless (WiFi) connection to download your Flat Rate data to the device. Once the Flat Rate data has been downloaded, an Internet or WiFi connection will no longer be needed to use the program in day to day usage.

Throughout this User Guide, the iPad, iPhone and iPod Touch will be referred to as **devices** or **TMS FRR (Flat Rate Reader) Devices**. The term **click or tap** will be used to indicate that the user should click, or tap, a button on the screen. On standard computers in the office network, this is done with the mouse. On iPhone, iPad or iPod Touch devices, you click a button by tapping it with your finger.

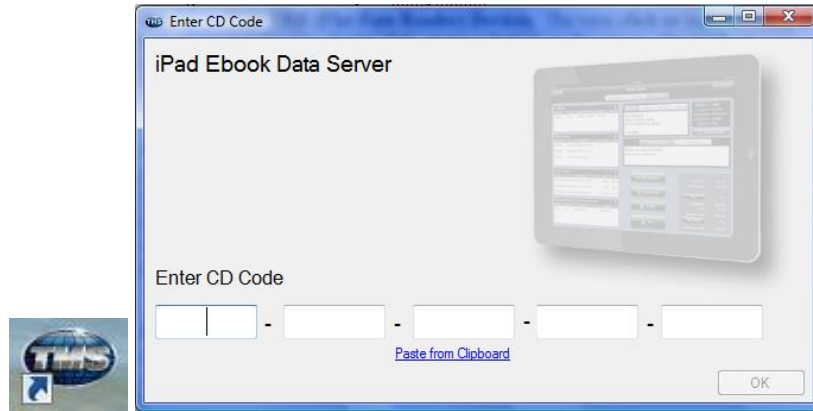
Installing the TMS Flat Rate Reader Software on a Windows PC

On the Windows computer that you are going to run the TMS FRR Software, insert the TMS Flat Rate Reader disk and follow the prompts to install the software. If installation does not begin immediately when you insert the CD, go to My Computer and double-click the icon for your CD-ROM drive to launch the setup program. Follow the screen prompts to complete the installation.

If you received a download link to download the TMS Flat Rate Reader, then save the file to a location on your computer’s hard drive. Double click the Setup file and follow the screen prompts.

Licensing the TMS Flat Rate Reader Software on a Windows PC

Once you have installed the TMS Flat Rate Reader Software on your Windows PC you will need to license it. In order to license it, your computer must be connected to the Internet.



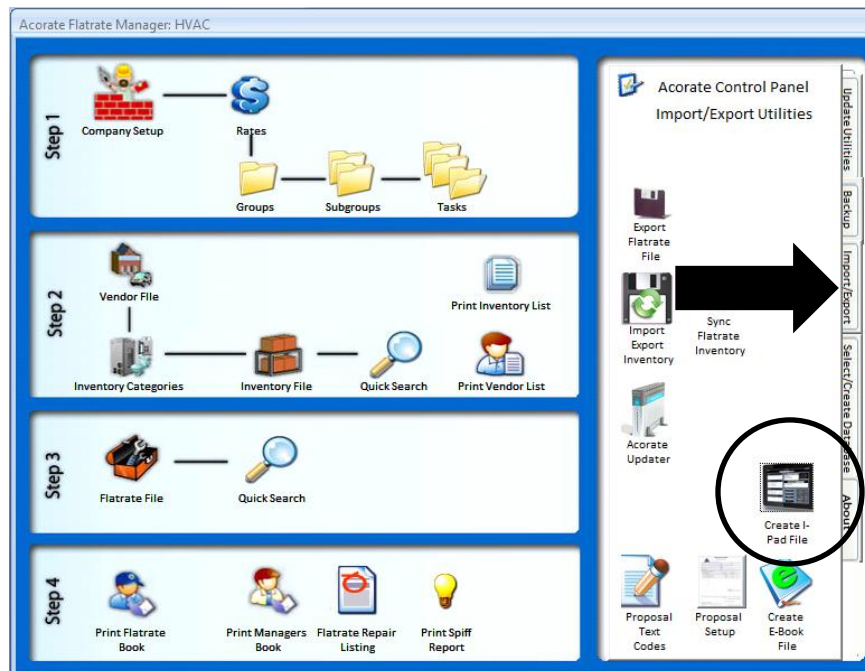
1. Double Click the “TMS” Globe Icon on your desktop.
2. Enter the CD Code provided to you by TMS. You will find this code in the packet that you received from TMS and / or in an e-mail that was sent to you. NOTE – If you have copied the CD code into the clipboard, simply click the Paste from Clipboard link at the bottom of the screen.
3. Click the Activate Button when prompted. NOTE – Make sure that your computer is connected to the internet in order to activate your software.

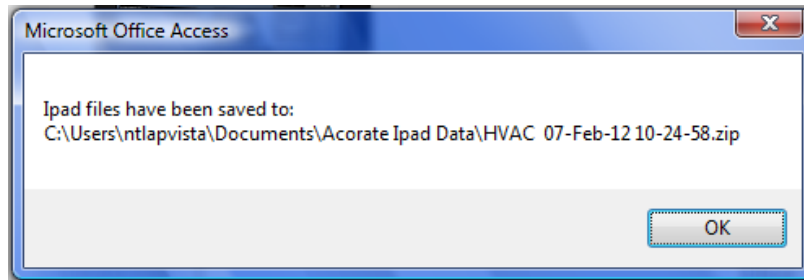


4. At this point, you are now ready to import your Flat Rate Files. Please see the section titled “Importing your Flat Rate Data”. NOTE 1 – If you are importing data from ACORATE, you will need to create an export file. Please see the section titled “Exporting your Flat Rate Data from ACORATE”. NOTE 2 – If you have subscribed to an ACORATE Data Plan from TMS, then your Flat Rate Files will be downloaded to your Windows version of the TMS Flat Rate Reader when you activate your software, and you can skip the section titled “Exporting your Flat Rate Data from ACORATE”. NOTE 3 – If you are importing a 3rd party Flat Rate into the TMS FRR, please contact Team Management Systems to determine if your Flat Rate System has the ability to be imported into the TMS FRR. Please realize that the TMS FRR is designed to work with the ACORATE Flat Rate Program and that TMS does not warrant or guarantee that 3rd party Flat Rate files can be imported.

Exporting your Flat Rate Data from ACORATE

In ACORATE, select the “Import/Export” tab on the right hand side of the main menu and click the Create iPad File icon. Select the location to where you want the file saved. By default, it will be saved in a folder called “Acorate Ipad Data” in your Documents folder. After the file is created, a window will appear indicating where the file was saved and the name of the file. The file name will be something like: HVAC 07-Feb-12 10-24-58.zip, which indicates the database name, date and time that the file was created. Write down or remember where the file was located, since you will need to point to that file to import your Flat Rate Data into the TMS Flat Rate Reader program installed on your Windows Computer.





Importing your ACORATE Flat Rate Data

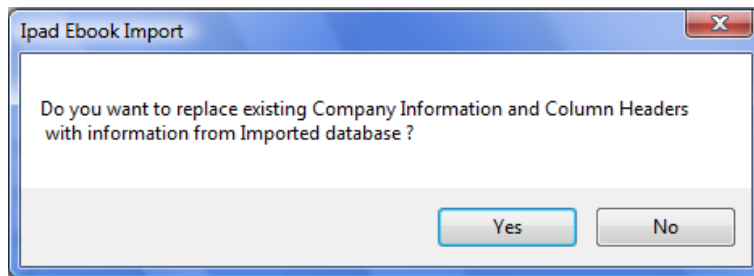
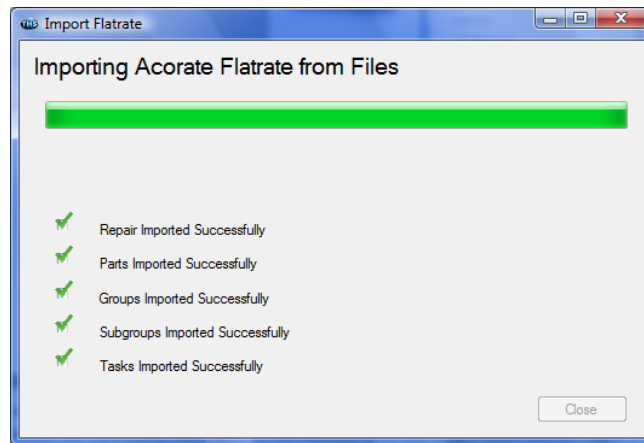
Importing Data for the First Time

After you have exported your database(s) from ACORATE, you will need to import the data into the TMS FRR. Open the TMS FRR on the Windows computer to which it was loaded by double clicking the TMS Globe Icon.



1. Click the "+" button below the list of Available Flat Rate Databases.
 - a. This is a list of the Flat Rate Databases that have been imported into the TMS FRR. For example, you might have an HVAC and a Plumbing Database in the list if your company does both trades.
2. Choose "Import from File" and click "Next".
3. By default, your ACORATE Database that you created will be in a folder called Acorate iPad Data in the Documents folder and will have a name similar to HVAC 07-Feb-12 10-24-58.zip. Find the file and double click on it.

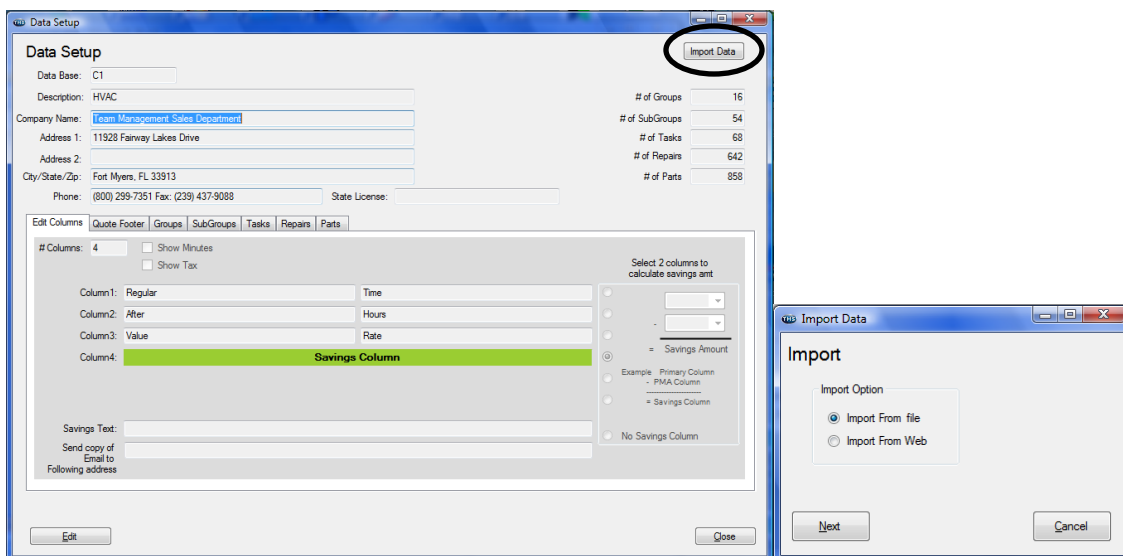
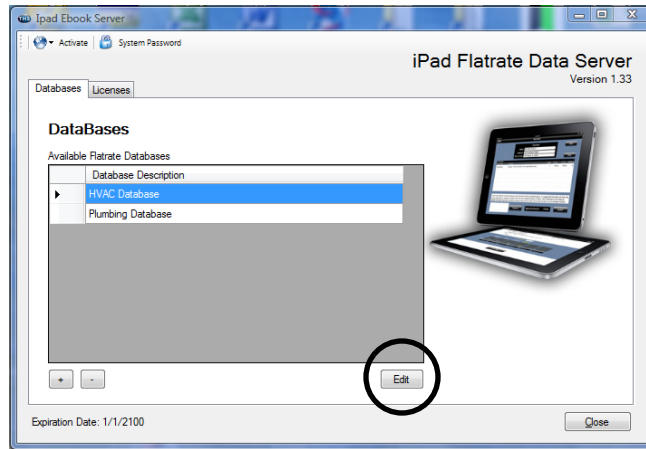
4. After the import is complete, you will be prompted with a window that says: “Do you want to replace existing Company Information and Column Headers with information from imported database?” Answer “Yes” if you want to use the information from your ACORATE setup file (Name, Address, Phone Number, Column Header Names, etc.). NOTE – If you are importing your ACORATE Data, then you will typically always answer “Yes” to this question. If you are importing a 3rd party Flat Rate file, then you will typically answer “No” to this question so that it doesn’t override your previously entered information.



Importing Updated Data into an Existing Database

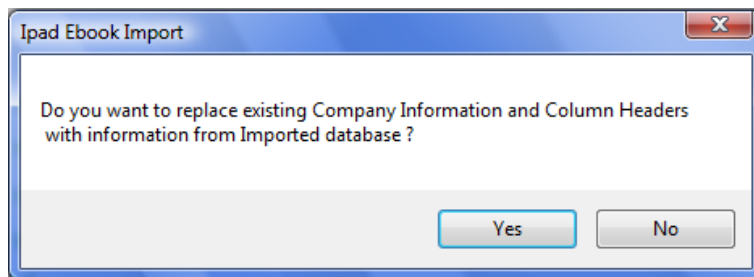
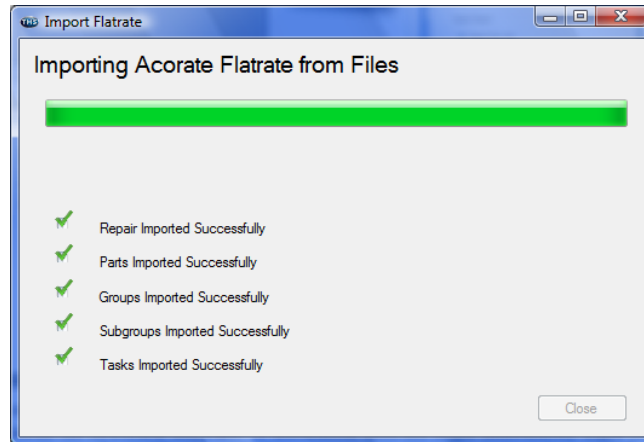
Any time that you update your Flat Rate data, (new rates, additional repairs, etc.) you will need to import the new data into your existing FRR Database, which will replace the old data. To do this, make sure that you have exported the database from ACORATE and that it is accessible from the computer on which you have loaded the Windows Flat Rate Reader. Open the TMS FRR on the Windows computer by double clicking the TMS Globe Icon.





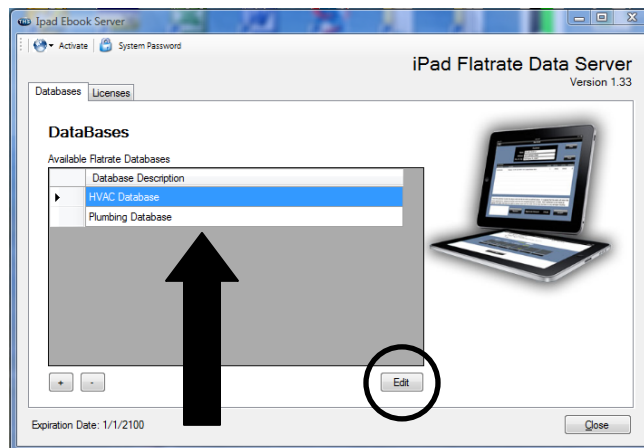
1. Select the Database that you want to replace by clicking it.
2. Click the “Edit” button below the list of Available Flat Rate Databases.
 - a. This is a list of the Flat Rate Databases that have been imported into the TMS FRR. For example, you might have an HVAC and a Plumbing Database in the list if your company does both trades.
3. Click the Import Data at the top right hand side of the Data Setup Screen.
4. Choose “Import from File” and click “Next”.
5. By default, your ACORATE Database that you created will be in a folder called Acorate iPad Data in the Documents folder and will have a name similar to HVAC 07-Feb-12 10-24-58.zip. Find the file and double click on it.
6. After the import is complete, you will be prompted with a window that says: “Do you want to replace existing Company Information and Column Headers with information from imported database?” Answer “Yes” if you want to use the information from your ACORATE setup file (Name, Address, Phone Number, Column Header Names, etc.). NOTE – If you are importing your ACORATE Data, then you will typically always answer “Yes” to this question. If you are

- importing a 3rd party Flat Rate file, then you will typically answer “No” to this question so that it doesn’t override your previously entered information.
7. Make sure that you have the technicians “Activate/Download Data” in their iPad(s) any time that you update your data in the Windows FRR. See section later in the manual for Downloading the data.



Editing your Company Information, Column Headings, Etc.

If you need to edit your Company Information or the Column Header Names, select the Database from the main screen and click the Edit Button at the bottom of the screen. Click Edit on the Data Setup Screen and make any necessary changes.



Data Base – This value will be defined by the TMS Flat Rate Reader when you add a new database to the system.

Description – This field is used to define the database that you have imported, for example HVAC, Plumbing, etc. This is the name that will appear in the Database List when you first launch the TMS Flat Rate Reader.

Company Name, Address 1, Address 2, City/State/Zip – Used for the Name and Address of your company. This is the information that will appear on the Quotation when generated.

Phone – This is a large field that can be used to enter your phone number(s). This information will appear on the Quotation when generated.

State License – Used for entering your companies State License number. This information will appear on the Quotation when generated.

Columns – This field is used to determine how many Flat Rate Columns you want to appear in your FRR. If you are using a Savings Column, then you need to add 1 to the number of columns that you are using. For example, if you have 3 columns in your price book and also show a savings column, then you would use 4 in this field.

Column 1 – Column 6 Left and Right Data Boxes – These fields are used to enter the heading titles you want to use for each of your Flat Rate columns. If you are using ACORATE, then the heading titles will be filled in for you. If you are importing a 3rd party Flat Rate, then you will need to manually enter the titles. The box on the left will appear above the data from the box on the right in your Flat Rate Reader.

Savings Text – Enter a line of text that you would like to show at the bottom of each Flat Rate Repair Detail screen on the Flat Rate Reader. For example, “As a Value Rate Customer you save money on every repair.” Or “Value Rate customers never pay Overtime fees.”

Send Copy of E-Mail to Following Address – If you want a copy of each Quote that is e-mailed to be sent to another e-mail address automatically (back to the office for example), then enter the e-mail address in this field. This will automatically fill in the “cc” e-mail address when a Quote is e-mailed to a customer.

Calculate Savings Amount

The information to the right of the Heading Columns is used to determine which columns are used to calculate the savings column that appears on the “Repair Details” page in the Flat Rate Reader. NOTE – If you are using ACORATE for your Flat Rate system, then you do not need to manually enter this information.

The screenshot shows a configuration interface for calculating savings. On the left, there are five radio buttons. The second one from the top is selected. To the right of the radio buttons, there are two dropdown menus. The first dropdown is labeled 'Column 1' and the second is labeled 'Column 3'. Below these dropdowns is a horizontal line, followed by the text '= Savings Amount'. Further down, there is an 'Example' section with the text 'Example Primary Column - PMA Column' followed by a horizontal line and '= Savings Column'. At the bottom, there is a radio button labeled 'No Savings Column'.

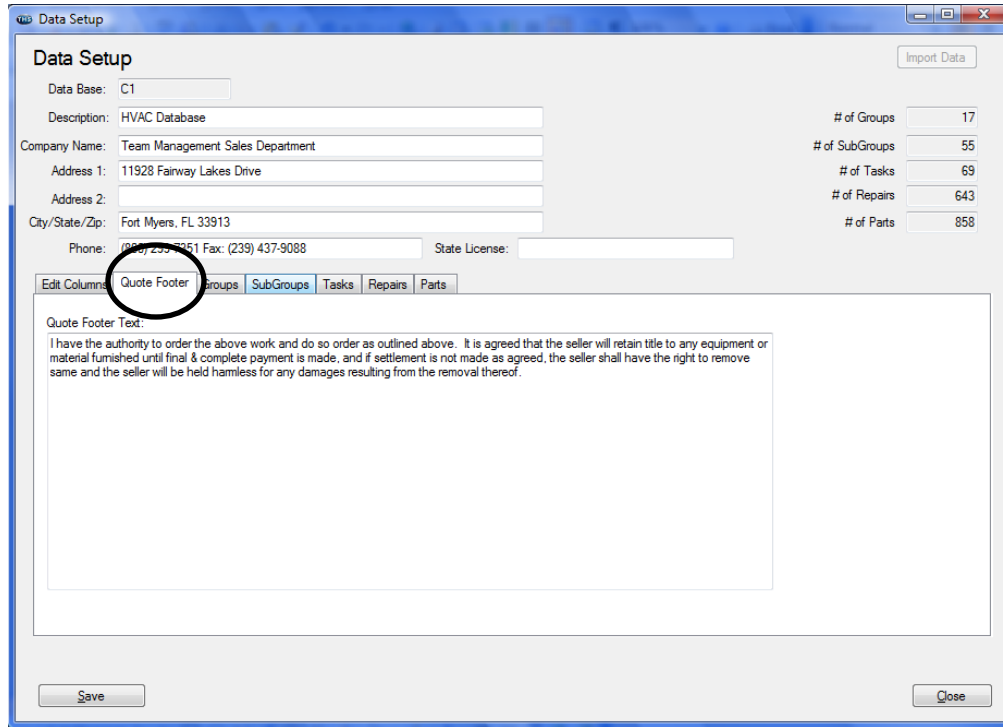
Radial Buttons on Left Hand Side – These indicate which column you want the Savings Column to be displayed. You have a choice of Columns 1 – 6.

No Savings Column – Click this option if you do not want to display a Savings Column in the Flat Rate Reader.

First Drop Down Box – This should be the column that contains your “Retail” price (usually the price you charge to a NON Service Agreement customer).

Second Drop Down Box – This should be the column that contains your Service Agreement Customer’s price. Therefore the Retail Price less the Service Agreement Price is the standard savings that you would show as a column your Flat Rate Reader.

Adding a Footer



The screenshot shows the 'Data Setup' window with the 'Quote Footer' tab selected. The window contains the following information:

Field	Value
Data Base	C1
Description	HVAC Database
Company Name	Team Management Sales Department
Address 1	11928 Fairway Lakes Drive
Address 2	
City/State/Zip	Fort Myers, FL 33913
Phone	(941) 235-8251 Fax: (239) 437-9088
State License	

Summary Statistics:

Category	Count
# of Groups	17
# of SubGroups	55
# of Tasks	69
# of Repairs	643
# of Parts	858

Quote Footer Text:

I have the authority to order the above work and do so order as outlined above. It is agreed that the seller will retain title to any equipment or material furnished until final & complete payment is made, and if settlement is not made as agreed, the seller shall have the right to remove same and the seller will be held harmless for any damages resulting from the removal thereof.

A footer will print at the bottom of the Quote generated in the FRR and is generally used to outline what the customer is agreeing to by signing the quote. To add a footer, simply click the “Quote Footer” tab below the company Name, Address and Phone Number section on the Data Setup Screen. Fill in the Quote Footer text and Save the Data. NOTE – Make sure that you are in the “Edit” mode to make any changes or add a footer.

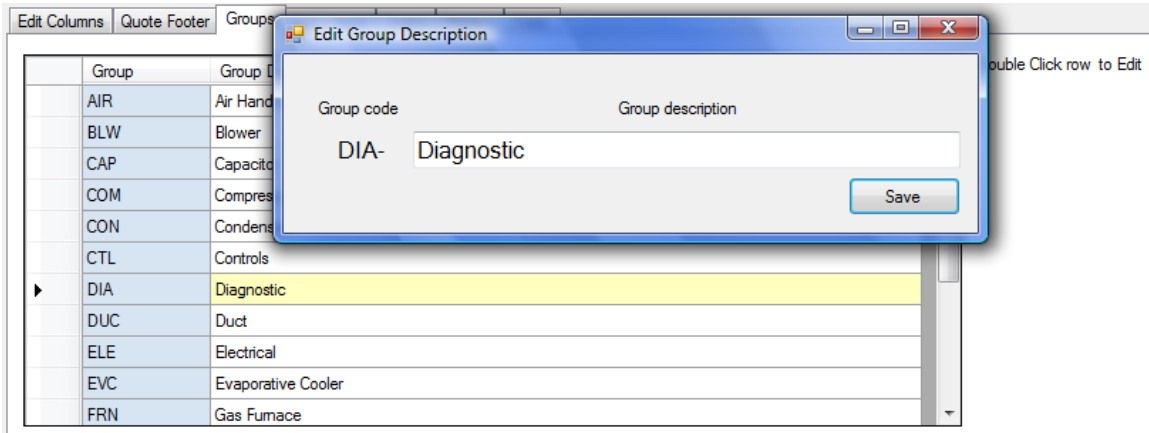
Editing Group, Sub Group and Task Names (3rd Party Flat Rate)

If you have imported 3rd party flat rate data into your TMS FRR, there is a good chance that the Groups, Sub Groups and Task Names will need to be edited so that they will reflect correct names. Since many 3rd party flat rates do not export the names of their Groups or Sub Groups, the description will automatically fill in the Group or Sub Group code. For example, if the group is “MOT”, then the system will fill in “MOT Group” in the Group Description field. You should manually modify this to say “Motors” so that the technicians in the field know the correct name of a Group. Imagine if you have a code called “CON” and did not put in the proper description. The tech will not know if CON is for Controls, Condensing Units, etc. To know the description of each Group

Code, you will need to refer back to your Printed Flat Rate Book and cross reference the Groups and Sub Groups to come up with the proper descriptions.

To modify a Group, Sub Group or Task Name, click on the appropriate tab and simply double click on the description field for the item you want to change. Enter the appropriate description and click save.

NOTE – Some 3rd Part Flat Rates only break out their books by a Group, and do not use a Sub Group. Therefore, the Sub Group section will not have any data in it. If your data only uses Groups, then when you use the FRR on the iPad or iPhone, as soon as you tap on the Group, the complete list of repairs associated with that Group will be displayed.



Reviewing Repairs and Parts

If you want to review the Repairs and / or Materials associated with each repair, select the Repairs or Parts tab and you will see a list of the Repairs and or Parts that will be imported into the mobile device. You cannot edit any of the repairs or parts in the list, but you can review them.

Repair #	Group	Description	Labor Time	Cost
PRT010030	MIS-PRT	Shipping Charges - Zone 3	45	\$130
PRT010035	MIS-PRT	Shipping Charges - Zone 4	60	\$170
PRT010040	MIS-PRT	Parts Acquisition Fee - Zone 1	30	\$94
PRT010045	MIS-PRT	Parts Acquisition Fee - Zone 2	45	\$130
PRT010050	MIS-PRT	Parts Acquisition Fee - Zone 3	60	\$170
PRT010055	MIS-PRT	Parts Acquisition Fee - Zone 4	90	\$240
PSS010000	FRN-PSS	Replace Universal Pilot Safety Switch	40	\$480
PUL010000	EVC-PUL	Replace 11" Diameter Blower Pulley	45	\$260
PUL010005	EVC-PUL	Replace Bronze Bearing Pillow Blocks	30	\$130
PUL010010	EVC-PUL	Replace 3/4" or 1" Leather Washer	5	\$34

Saving Changes

You will need to save the changes that you made after editing Data Setup Files. Simply click the “Save” button at the bottom of the screen.

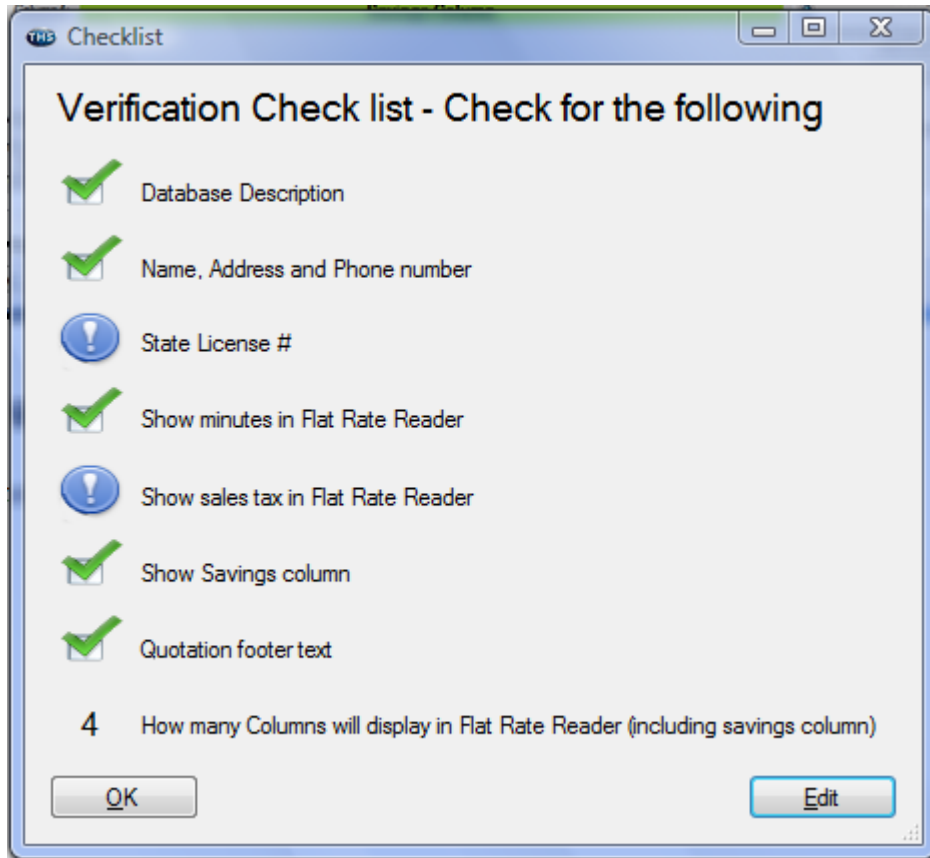
The screenshot shows the 'Data Setup' window with the following details:

- Data Base:** C1
- Description:** HVAC Database
- Company Name:** Team Management Sales Department
- Address 1:** 11928 Fairway Lakes Drive
- Address 2:**
- City/State/Zip:** Fort Myers, FL 33913
- Phone:** (800) 299-7351 Fax: (239) 437-9088
- State License:**
- Summary Statistics:**
 - # of Groups: 17
 - # of SubGroups: 55
 - # of Tasks: 69
 - # of Repairs: 643
 - # of Parts: 858
- Column Configuration:**
 - # Columns: 4
 - Column 1: Regular (Time)
 - Column 2: After (Hours)
 - Column 3: Value (Rate)
 - Column 4: Savings Column (highlighted in green)
- Options:**
 - Show Minutes
 - Show Tax
 - Example: Primary Column - PMA Column = Savings Column
 - No Savings Column
- Savings Text:** As a value rate customer, you save money on every repair!
- Buttons:** 'Save' (circled in red), 'Close', 'Import Data', and 'Edit Columns'.

Closing the Data Setup Screen

Each time you close the Data Setup screen, a Verification Check list will be displayed notifying you of the options that you have selected and / or setup in the Setup Screens. This screen will verify if you provided a Database Description (HVAC Data, Plumbing Data, etc.), if you entered your company’s Name, Address and Phone Number information, if you have provided a State License Number that will print on the Quote, if you chose to show the number of minutes a repair should take (this will appear at the end of the Flat Rate Repair number, for example MOT010025–090, which would indicate that the repair should take 90 minutes), if you elected to show Tax broken out in the FRR, if you elected to show a Savings Column and if you entered a Footer that will appear on the Quote. In addition, it also verifies how many columns (including a savings column if appropriate) will be displayed in the FRR. This is a great verification so that you can determine what is going to be displayed on the FRR in the field. If you realize that you missed an item (Show Minutes for example), you can simply click the “Edit” button at the bottom of the Verification screen and make your appropriate changes. If an item has

been filled in, you will see a check mark next to the description. If an item has not been filled in or selected, you will see an exclamation point next to the description.

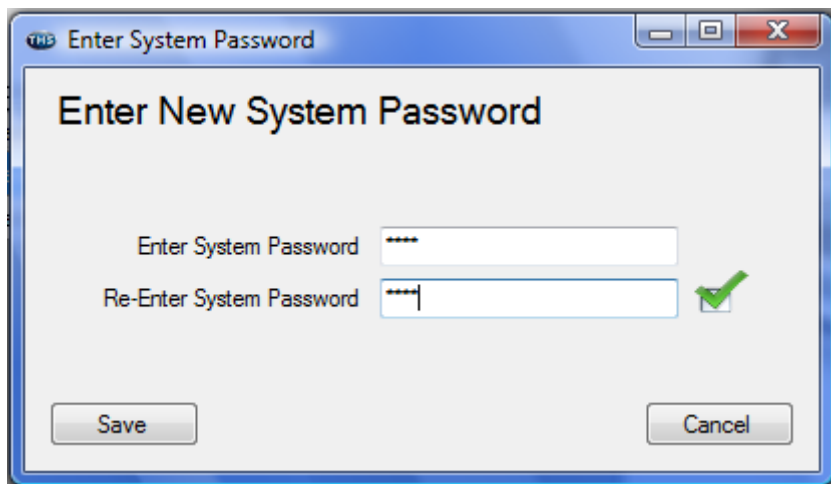


Changing the System Access Password

In order for the iPad or iPhone device to connect to the TMS FRR computer in the office, it uses a password. By default the password is "1234". You can use the default password or you can change it to something else. The same password will be used by all of the devices in the field. To change the system password, do the following:

1. In the Windows version of the TMS FRR, click the "System Password" toolbar option at the top of the screen.
2. Enter and re-enter your new system password in the fields provided.
3. Click the Save button.

NOTE – Make sure that you remember the password because you will need it when you set up the iPad / iPhone devices. If you forget the password, simply follow the above procedures and enter a new password. If you change the password, each device in the field will need to change the password in order to access the data again.



Installing the TMS FRR Software on an iPad, iPhone or iPod

There are 2 ways that you can download the TMS FRR program to your device, both of which will require that you have an iTunes account with Apple.

NOTE – *The fields are the same in the iPad and iPhone or iPod Touch. The screen shots in the documentation are from an iPad, but the screens in the iPhone or iPod Touch are similar, just require the use of scrolling.*

Downloading from iTunes on computer

1. Open your iTunes on your desktop computer.
2. Search iTunes for TMS Flat Rate Reader in the “app section” of iTunes.
3. Select the appropriate version, iPhone or iPad.
4. Click Download.
5. Connect your device to iTunes and Synchronize. Make sure that you have TMS Flat Rate Reader selected to Synchronize.

Downloading directly from the App Store on your device

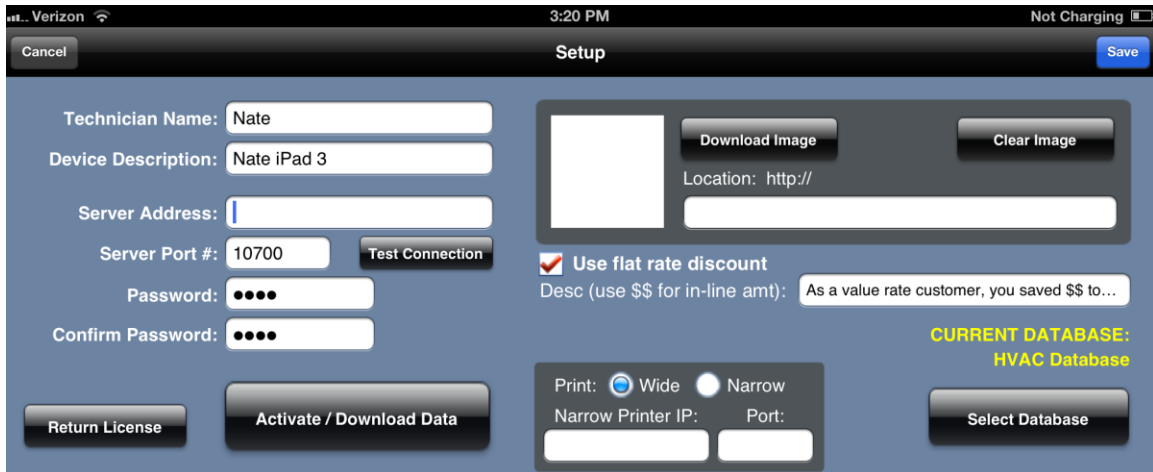
1. On your device, open the App Store
2. Search for TMS Flat Rate Reader
3. Tap the Download Button

Setting Up the TMS FRR on the iPad, iPhone or iPod



After you have downloaded the TMS FRR to your device, tap on the TMS Flat Rate icon to open the program. You will start out on the Flat Rate Groups Screen. Tap the Setup button at the bottom of the screen to open the Setup Screen.

NOTE – When you download the TMS FRR from the App Store, it will have a sample database in it with a few different groups, sub groups and repairs. Once you install your own data, the sample data will be erased. If you want, you can use the sample data prior to downloading the new data to familiarize yourself with how the TMS FRR works on the device.



Technician Name – Enter the name of the technician to which this iPad has been assigned.

Device Description – Enter a unique description for the device. This information will be used if a technician loses his device and you need to de-activate the license that was assigned to this device. Make sure that you use a name that will signify what device it is. For example Truck 15 iPad, or Nate’s iPad, etc. Do not use the same name for all devices (like “Company Name iPad”), because if you need to disable the license, there will be no way for us to know which license needs to be disabled. This would cause you to have to disable ALL devices and re-activate each one.

Server Address – this is the Static IP address of your router, which will be forwarded to the Windows computer on which the TMS FRR has been installed. The device will use this address to download the Flat Rate data each time it has been updated. NOTE – if you are on the internal LAN (Local Area Network) of your office and you have a Wireless router, then you can enter that IP number here, but that will require that you come to the office each time you want to download the updated data.

Server Port # - The system uses Port Number 10700 to transmit data. Make sure that you enter 10700 in this field.

Test Connection Button – Once you have entered your Server Address and your Server Port number, tap this button to see if you get a connection. If you do not make a successful connection, check for the following:

1. Make sure that the IP Address is correct in the Server Address Field
2. Make sure that you are using Server Port # 10700
3. Make sure that you have forwarded Port 10700 to the IP Address of the Windows computer on which the TMS FRR software has been loaded.
4. Make sure that you have made an exception for port # 10700 in your Firewall on the Windows computer.
5. On the server, make sure that the “TMS Flat Rate Reader Data Service” is running. It is set to start automatically, so this should always be running.

Password – Enter the “System Password” that you assigned in the Windows Flat Rate Reader program. The default is “1234”, so if you have not changed it, use “1234”.

Confirm Password – Re-enter the “System Password”

Download Image Button – Click this button after you have entered the internet location of your company logo. You must store your logo on the internet in order to be able to download it. If you do not have any way of doing this, forward your logo to TMS and we will upload it to an internet location for you.

Clear Image Button – Click this button if you want to remove the logo from your device that was previously downloaded.

Location – Enter the internet location as to where your company logo has been uploaded. NOTE – Only enter the location starting with “www”. Do not enter the http:// in front of the www.

Use Flat Rate Discount – Place a check mark in this field if you want to show a discount if the sell price you pick is lower than the retail price. For example, if you offer a discount to your service agreement customers, then you can show them the amount that they saved as a result of having an active service agreement with your company.

Desc (use \$\$ for in-line amt) – Enter the text that you would like to print on the Quote showing the customer the amount of money they saved. Enter \$\$ where you would like the amount of savings to appear in your text. For example: “You saved \$\$ for being a Value Rate Customer. Thank you for being a Value Rate Customer!” If the customer saved \$15.00 on the repair because they are a “Value Rate” customer, the text would show “You saved \$15.00 for being a Value Rate Customer. Thank you for being a Value Rate Customer!” Notice that the \$\$ was replaced with \$15.00, which was the amount of savings.

Print Wide / Narrow – If you have a supported 4 inch printer, then you can choose to print to a narrow printer as opposed to the default 8.5 X 11 inch printer. Currently the only narrow printer supported is a Printek Fieldpro 4” WiFi printer. Please contact TMS for more details about the 4” printer and the requirements and limitations.

Narrow Printer IP – If you choose to use the Narrow Printing option, you will need to enter the Static IP address of the Narrow printer in this field.

Port – Enter the Port Number assigned to the Narrow printer. The Printek Printer uses a default port number of 8023. Use this number unless you have changed it on the printer.

Downloading Data



Once you have finished filling out the Setup Screen, you are now ready to download the data. Make sure that the data has been

imported into the Windows version the TMS Flat Rate Reader at the office and then tap the “Activate / Download Data” button. This will connect to the computer back at the office and download the Data Files.

NOTE – Anytime that the data is updated back at the office, you will need to download the data again to keep the device up to date.

Selecting Database



After you have downloaded the database, you will need to select the Database by tapping the Select Database button. This will display a list of Databases. Find the Database you want and tap on it. When you are finished, tap the Save button at the top of the screen. To verify that you have the correct database selected, it will be displayed at the bottom of the Groups screen next to the Quote button.

Returning FRR Licenses



If you need to retire one of your devices or a technician gets a new device, you will need to return the license from the device so that they can install it on a new device. To return the license, simply click the Return License button on the FRR Setup Screen. This will remove the data from the device and return the license back to the office so that it can be used on a different device.

If a device is lost or destroyed, you can contact TMS and report it as lost. The license number will be marked as lost and you will need to re-activate your Windows version of TMS FRR to relieve that license. If in the future that device is found and tries to download the data again, the license will be de-activated automatically.