

# TrailBlazer Installation Instructions

Contained in the zip file, you will find the TrailBlazer installation package, a scripts.sql file, and this document.

The first step in the installation process is to create a new database on your database server. Trailblazer requires a MS SQL 2005 or 2008 server to store its data on. Create a new database, and give it a suitable name, such as 'repairstore' or 'trailblazer', then open a new query window and paste in the contents of the script.sql file. Execute the scripts, and once complete, you should have a fully set up database with the data required for a fresh installation.

Next, the web pages and code files need to be installed on your web server. Create a new virtual directory, and either run the install package (\*.msi) and install the Trailblazer application to your new virtual folder, or copy the install files from the trailblazer install.zip package to the new virtual folder.

The last step is to edit the web.config file in the virtual folder, and look for the line that starts with –

```
<connectionStrings>
```

```
    <add name="PirTickets" connectionString="
```

Replace the server name with your database server name, and replace the username and password with your own.

Once installed and configured, you can now open your new Trailblazer installation, click on the log in link at the top right, and log in with username 'admin', and password 'admin' - it is important that you change these once logged in.

Now, before starting to enter new repairs into the system, it is important to configure a couple of things. Go to the 'configuration page', and set the email address, mail server and password for your mail server. It is also important to set 'enforce peer review' to false if you do not use Peer reviews within your workflow.

If you have purchased a licence key, it is important to enter it now too. It is also important to set the sales tax, tax name, and currency symbol.

If you want your technicians to receive emails whenever they have a new work item added to their list, then set the 'notify technicians' option to 'yes'.

If you are running a pc or computer repair shop, then make sure that PC repair mode is set to 'Yes'.

## Configuring the System

### Repair Status

Click on the 'status levels' menu item, and you will see a table with all of the possible statuses for repair items. These can be edited, by clicking the Edit tag next to each status item, and can also be deleted. Using the Add New Status button at the top, you will be able to create your own status level for your repairs e.g. 'With sub contractor'.

Note – items 1 and 2 in the status level list are important within the workflow of the system, and should not be removed (although you may modify the text). The status that represents a repair item being assigned to a technician must always be left at position 2 (with status level as 2).

Another important level that the system needs to know, is at which level the repair is considered to be complete. This can be set with the drop down list at the top of the page (Repair Completed Threshold: ).

## Manufacturers

Trailblazer has full functionality for maintaining a list of manufacturers and models for repair items. Click on the 'manufacturers' menu item to go to the manufacturers maintenance screen. Here, you should see a table containing names of manufacturers. Models are not loaded into the system in initial setup, as they tend to change a lot, and the sql install script would become unmanageably big. However, some example models have been installed for certain manufacturers – click on the 'Select' tag on the top line (Acer), and you should see a list of models appear below. Be careful not to click delete, as the manufacturer will be deleted immediately. You can see in the bottom table, with model names, that there are options on each line to 'Edit' and 'Delete' the models. As with manufacturers, clicking edit will allow you to change the name of the model.

If you want to add a new model to the selected manufacturer, enter the name of the model in the text box above the models table (Add new model to manufacturer), and click the 'add new' button. The new model will be added to the list – you may have to page through the list of models to see the new added model. Try adding a new model to a manufacturer with no listed models, such as 'AMAX', and you will see the new model appear in the table.

## Importing Manufacturers and Models

If you have a list of manufacturers that you wish to import into the system, then that is possible. Click on the 'Import Manufacturers' menu item, and you will see the import screen. At the top is a text box for entering lists of manufacturers (one per line), and below you will see a drop down list for selecting manufacturers, and another text box for adding lists of models (again, one per line). Before importing lists of models, make sure you have the correct manufacturer selected.

Note – make sure there is no punctuation in the lists of manufacturers or models, such as commas(,), quotes ("), and semi colons(;).

## Adding Employees

Click on the 'Employees' menu item to view the current list of employees (this includes technicians, managers, and administrators).

On first install, you will see a table with one line, listing an admin user. This is your current user account. You can click the 'Select' tab next to the Admin user line to edit the details for this user. You will need to enter your

name and email. Don't change the security level, or you won't be able to log in as administrator again. You can also change the username, and enter the contact details for this user. Click 'Save' to save the changes to this user account, or 'Cancel' to go back to the list of employees without saving.

## Parts Store

Clicking on the 'Parts Store' menu item will take you to the Parts Store. This is where you can keep a complete inventory of all of the parts you use in your repair service. You will see a page with the title 'Parts Store', and a button labelled 'Add Part'. The list will be empty after installation, so you will need to go through the process of adding in some of your most commonly used parts – Processor fans, RAM modules, CPUs and PSUs. If you set your re-order level, then you will be alerted by email whenever the parts' quantity is low.

Parts added to the Store can be added to repairs in the repair maintenance screen, and the parts costs are used to calculate the total repair cost, so please make sure your prices are accurate (add in your sales margin on each item in the store).

## Service Codes

A recent addition to Trailblazer, is the feature of Service Codes, so you can create a list of standard service items (dust removal, RAM re-seat, hard drive backup etc.), and then you can add these to repairs. (see the 'Services' tab in the repair screen).

All items added as services are added to the cost of repair (if the service or parts items don't appear on the total cost for any reason, then click the 'Refresh' button to re-calculate the costs).

Click on the 'Service Codes' menu item to set up new service items. You will see a list of service codes, and a button for adding new items. You can also edit the types of services ('General', 'Labour', 'Calibration' etc.) – add as many as you need for the type of repairs you perform.

## Customer Messages

If you would like to edit the messages that are sent to your customers during the repair process, then click on the 'Customer Messages' menu item. Here, you will see a list of messages that have been set up for various stages of the repair process. Messages can be configured to be sent out for any of the status levels.

Select one of the messages in the list to view its' details. You will see the status level selector at the top, with two message boxes – one for SMS messages, and one for email. The buttons on the right hand side allow you to enter certain tags which will be replaced with the appropriate detail when the message is sent out. For example, clicking 'Add Model' will add the tag '#model#' into the end of the text, which will be replaced with the name of the model in the SMS or email message. Move these tags around within the message as you require.

Under the message boxes, you will see check boxes called 'Send SMS' and 'Send Email'. These are used to determine whether SMS or email messages are sent out by the trailblazer system when a repair reaches the stated Status Level.

## Printout Templates

In the templates folder of the installation directory, you will find four template files, with the file extension '.st'. These templates are HTML based, and can be amended to suit your purposes, or preferences. These templates contain tags surrounded by dollar symbols (e.g. \$telephone\$), which can be moved to any position with the template, and can also be removed or duplicated as necessary. If you have basic knowledge of HTML, it will be fairly straight forward for you to make changes to these template files.

There is a complete list of tags contained in each template at the end of this manual.

# Using the Trailblazer System

## Booking in a repair

First, click on the 'Book in repair' menu item. You will now see the new repair entry form. There are quite a few available detail fields on this screen, but not all of them need to be completed to create a new repair ticket.

If you have multiple locations, then select the location that this repair is being booked in at. Next, we need to select the customer. If the repair is for an existing customer, then you can either find them in the drop down list, or use the search facility to find them. There are two possibilities for searching – either enter the customers name (surname, first name, or company name) into the Name/ID field, or their phone number and click 'Find' – if a customer is found with any of these details, they will be selected in the drop down list, and an indicator will appear displaying '<- Matching customer found'. If a customer is not found, then they may not exist in the system, and you can use the 'New' button to add them. Once you have added the new customers details, you will be returned to the repair entry screen, and the new customer will be selected in the drop down list.

You may also use the 'search' button, which will show a list of all customers. To find a customer, use the search fields at the bottom of the screen - enter an organization name, person name, or city, and hit the Tab or Enter buttons to search. Or, you can page through the list using the pager tags (1 2 3 ...). Once you have found your customer, click the 'Select' tag, and you will return to the repair entry form with the correct customer selected in the drop down list.

### **Manufacturers and models**

The next step is to select the Make and model of the item that is being booked in for repair. You can select the make from the 'Manufacturer Name:' drop down list – the model drop down list will then contain any models that are in the system for that manufacturer (it may be empty if none exist).

If the manufacturer is not listed, then you can enter the name in the 'New Manufacturer' text field. You can now add this new manufacturer name to the existing list by clicking 'Add Manufacturer'. (If the manufacturer name already exists in the list, it will not add it again, but will select it – try this by adding the name 'Dell').

Models can be added to manufacturers, if they don't exist already, by putting the model name in the 'Unknown model' field and clicking 'Add Model'.

### **More Details**

You can now go on to add in the rest of the information for the repair. If this repair has come from a trade customer with their own reference, you can add this into the 'External reference field'.

You can assign the technician who is to work on this repair, by clicking 'Assign', and selecting the name of the technician.

If the item is under warranty, click on 'Warranty work', and a date picker field will appear, allowing you to select the expiry date of the warranty.

## The repair list

If you are logged in as admin, you can click on the 'view repairs' menu item to see a complete list of repair tickets in the Trailblazer system.

You will see 5 Tab buttons at the top of the list –

- Repairs – This show all repairs in the system, but can be filtered on 'Completed', 'In Progress' and 'All'. The default view is 'In Progress'. There are search facilities to allow you to find repairs, in what may become a very long list. The S.No/Ref field will find repairs by serial number, external reference (Ref) or by repair ID. The 'customer' field will find repairs by customer name (first name, surname or organisation name). You can also select the number of row to display.
- Customers – This shows a list of your customers that have repairs that have not yet been completed. Click the 'Select' tag to see a list of repairs for the selected customer.
- Employees – This tab page show a list of all of your technicians, managers and admins that have repairs allocated to them that are not yet complete.
- Unassigned – shows a list of repairs that have not yet been assigned to a technician.
- Unlisted Makes/models shows a list of repairs that have new Manufacturers or models that have not been added to the list. As an admin user, you may select one of these repairs and click 'Add manufacturer' or 'Add model' to add the new manufacturer name or model to the list. Of course, you can edit the names first if you think they are incorrect.

Note – all headings on the repair lists can be clicked to re-order the list. By clicking on the Make heading, the list will be ordered alphabetically in order of Makes. This works for all headings.

Also, by hovering the mouse over the Model name, you will see a tooltip showing the Serial number. If the 'Status/Ass.to' field has a technicians name (if assigned to a technician), then you can hover the mouse over the technicians name to see the actual status.

## Repair details

By selecting one of the repairs from the list, you will see a screen containing fields for all details of the repair. At the top. You can see the Repair ID, received date and customer name. There are details for cust. telephone, and

you may see a red indicator displaying '**No Mobile No. Supplied**' this means that the customer has not supplied a mobile number, so they won't receive SMS alerts automatically (you may need to call them to keep them informed of their repair status).

At the top right, you will see a priority field - High or Urgent priority repairs will show as an alert indicator on the repair list page.

Below the priority selector, you will see one of the most important drop down lists on this screen – the status selector. This drop down list contains all of the possible statuses for repairs – from 'Booked in' to 'Paid in Full', or whichever variant you choose (as described in the earlier section on editing Status Levels). If you change the status from a level, such as 'Booked in' to 'Completed', then the system will set the repair complete flag, and the 'Date Completed' . If you have configured the system to 'enforce peer reviews', then you will not be able to set the repair status to completed, or higher, unless the repair has been set as 'Work Completed' and 'Peer Checked' (see Repair Details Tab Page). When logged in as admin, you will be able to set the assigned Technician and the 'Assign Peer Check' fields. When a repair has a technician assigned to perform a peer review, the repair will appear on the list of peer reviews to perform when the assigned technician logs in.

## **Parts Replaced**

Click on the 'Parts replaced' tab to see a page that lists parts used in the repair. You can add parts to this repair by clicking 'Add part' – you will be presented with a selection screen with a list of parts. Select the appropriate part, and enter the quantity. Add as many parts as you need, and then close the selection window down. When the window is close, the parts list will be updated with the new parts, and the 'Listed parts cost' line will show a total for all of the parts added.

## **Misc. Parts**

If you want to add parts that are not in your stores list, or are parts scavenged from scrapped repair items, you can add them into the misc. Parts tab page. You can enter as many items as you like here, along with any descriptions. You must total the misc. parts costs manually and enter them into the 'Misc. Parts Cost' box.

## **Costs**

The Costs tab page shows the Labour cost, VAT cost (sales tax), amount paid (if a customer pays a deposit up front), and the amount due. Whenever you change the labour cost, or other field on this tab page, the amount due should be re-calculated. Also, it is possible to enter the amount due, and when you tab out of the field, the VAT and labour costs will be calculated, taking parts costs into account.

If the parts costs do not look like they are correct, then click the 'Refresh' button to force a re-calculation (this may be necessary after adding new parts to the repair).

## **Bottom button bar**

There are 5 buttons on the bottom row of the repair screen, when logged in as an admin user.

- Save – Use this whenever you have made changes to the detail on this screen. Once saved, you will be returned to the repair list page.

- 'Print Bookout Form' – use this to generate a printable form that contains the details of the repair (such as make/model, customer, fault description and steps taken to correct fault, and the costs.
- 'Reprint Labels' – Use this to generate a printable form that is the same as the labels generation in the Booking in screen. Useful if you have misplaced a label, or labels have been damaged.
- Cancel – leave this repair without saving, and return to the repair list page.
- Delete – used to delete the repair ticket. Use with caution. Can be useful if mistakes have been made with a repair booking, or if for some reason the same equipment has been booked in twice (unlikely if you use repair stickers).

## Invoices

Invoices can be generated by Trailblazer very easily. Note – invoices are only generated for trade customers, as walk in customers usually only have a low volume of repair items, and a booking out sheet is usually enough.

Click on 'Uninvoiced repairs' to see a page with a list of repair items that have not yet been invoiced for. (on a new installation, this screen will have an empty list).

At the top, you will see a drop down list with trade customers who have repairs not yet invoiced. Selecting from this list will show the list of repairs for that customer underneath. If you want to create invoices for a customer, select them from the list, and click 'Generate Invoices'. All of the complete repairs that have not yet been invoiced for the selected customer will be collated, and the VAT and totals will be calculated. Once the invoice has been generated, you will see a screen with the invoice items, and the totals.

To view the full invoice, click on the 'View Invoices' menu item, and select the new invoice from the list (if there are more than one invoice, then the newest are at the bottom. You can show the newest at the top, by clicking the 'Inv No.' header twice. Select your invoice from the list (note the generated date in the list, which can help with locating the correct invoice), and you will see a page with the full invoice details. From here, you can print the invoice, or click 'export' to have the invoice generated as a word document (useful for emailing to clients). Once printed, the printed flag will be set. Once the invoice has been returned paid, you can click on the 'Paid' check box to show that the invoice payment is complete.

## **Addendum**

## Template Tags

### **bookin.st (The booking in sheet)**

#### **Customer Details**

Company Name : \$companyname\$

Address : \$address\$

Telephone Number : \$shoptel\$

Company No. : \$companyno\$

VAT No. : \$vatno\$

Company Website URL : \$url\$

Company Email : \$email\$

Customer Name : \$customer\$

#### **Repair Details**

Repair Number : \$repno\$

Manufacturer : \$manufacturer\$

Model : \$model\$

With Case : \$case\$

With Charger : \$charger\$

Description : \$description\$

With Battery : \$battery\$

Serial : \$serial\$

Ref : \$externref\$

Estimated Cost : \$estimate\$

Date Received : \$datereceived\$

Engineer : \$technicianame\$

Received by : \$receivedby\$

Problem Description : \$comments\$

Deposit Paid : \$deposit\$

Warranty Exp : \$warrantyexp\$

## repairlabels.st (Booking in Labels)

Company Name: \$companyname\$

Address: \$address\$

Date Received: \$datereceived\$

Repair Number: \$repno\$

Booked in by: \$receivedby\$

Customer: \$customer\$

Technician: \$technicianname\$

Description: \$description\$

Manufacturer:\$manufacturer\$

Model: \$model\$

Serial: \$serial\$

External Ref: \$externref\$

Mains Charger: \$charger\$

Battery: \$battery\$

Case: \$case\$

Problem: \$comments\$

Warranty Work?: \$warranty\$

Estimated Cost: \$estimate\$

Diagnostic Fee: \$benchfee\$

W/No. \$repno\$

Customer Name: \$customer\$

Workorder: \$repno\$

Customer: \$customer\$

Telephone: \$custtel\$

## invoice.st (Invoice template)

Company Name (yours): \$companyname\$

Invoice No.: \$invoiceno\$

Date: \$datecreated\$

Customer Name: \$customer\$

### **Your Address Details**

\$address1\$

\$address2\$

\$city2\$

\$postcode\$

Tel:\$telno\$

### **Customer address details**

\$custaddress1\$

\$custaddress2\$

\$customercity2\$

\$custpostcode\$

### **Other Details**

Invoice Item details : \$tabledetails\$

Subtotal:\$subtotal\$

Paid in Advance: \$PIA\$

VAT:\$VAT\$

Total Due: \$total\$

## repairsummary.st (Repair Summary Sheet)

Company Name (Yours) : \$companynames\$

Company Address : \$address\$

Company No. : \$companyno\$

VAT No. : \$vatno\$

\$url\$ : \$email\$

Customer Details : \$customers\$

Work Order: \$repno\$

Manufacturer: \$manufacturer\$

Case: \$cases\$

Model: \$model\$

With Charger: \$chargers\$

Description: \$description\$

With Battery: \$batterys\$

Serial: \$serial\$

Ref: \$externref\$

Estimated Cost: \$estimate\$

Date Received: \$datereceived\$

Engineer: \$techniciannames\$

Received by: \$receivedbys\$

Comments: \$comments\$

Action Taken: \$actions\$

Parts Replaced: \$partss\$

Deposit Paid: \$deposits\$

Total Cost: \$totals\$

VAT Cost: \$vat\$

Amount Paid: \$pays\$

Amount Due: \$dues\$

Date Delivered: \$delivered\$

Warranty Exp: \$warrantyexp\$

Date Paid: \$datepays\$

Paid in Full:\$paidfull\$ (Y/N)