

Checking In A Customer

1. Choose **Check-In** from the main screen.



Access The EZServiceTrax Portal



- Fill out the customer's contact information. Make sure to get their cell phone number so that it is easy to get back in touch with them.

The image shows a multi-step contact information form. At the top, there are five steps: 1. Your Information (highlighted in blue), 2. Computer Problem, 3. Your Equipment, 4. PSA Agreement, and 5. How Did You Find Us. The main form area contains the following fields:

- Your Full Name:** Brian Fleishman
- Email Address:** Bfleishman@jaydien.com
- Your Full Mailing Address:** 9 Cape Ct, Howell, NJ 07731
- Cell Phone Number:** 732-987-4193 (with a placeholder *xxx-xxx-xxxx*)

At the bottom right, there are two buttons: "Previous" (disabled) and "Next" (active).

3. Enter a brief description of the issue.

1. Your Information

2. Computer Problem

3. Your Equipment

4. PSA Agreement

5. How Did You Find Us

Please Provide A Detailed Description Of Your Issue

Possible virus.

Previous Next

4. Record **ALL** the equipment that the customer is leaving with us as well as their **PASSWORD**.

1. Your Information

2. Computer Problem

3. Your Equipment

4. PSA Agreement

5. How Did You Find Us

What Equipment Are You Leaving With Us?

Laptop and power charger

Do You Have A Password?

password

Previous Next

5. Choose whether or not the customer is signing up for a **Protection Service Agreement (PSA)**. Please note, the customer can sign up for this during checkout as well.

1. Your Information 2. Computer Problem 3. Your Equipment 4. PSA Agreement

5. How Did You Find Us

Are you signing up for a Protection Service Agreement (PSA)?

No

Previous Next

6. Ask customer how they heard of our services and record it by choosing an option in the list.
Then click **FINISH**.

The screenshot shows a survey interface with five steps. Step 5, 'How Did You Find Us', is the active step. Below the step title is a dropdown menu with 'Signage' selected. At the bottom right, there are two buttons: 'Previous' and 'Finish'. The 'Finish' button is highlighted in a darker blue, indicating it is the next action to take.

1. Your Information 2. Computer Problem 3. Your Equipment 4. PSA Agreement

5. How Did You Find Us

Please let us know how you found us

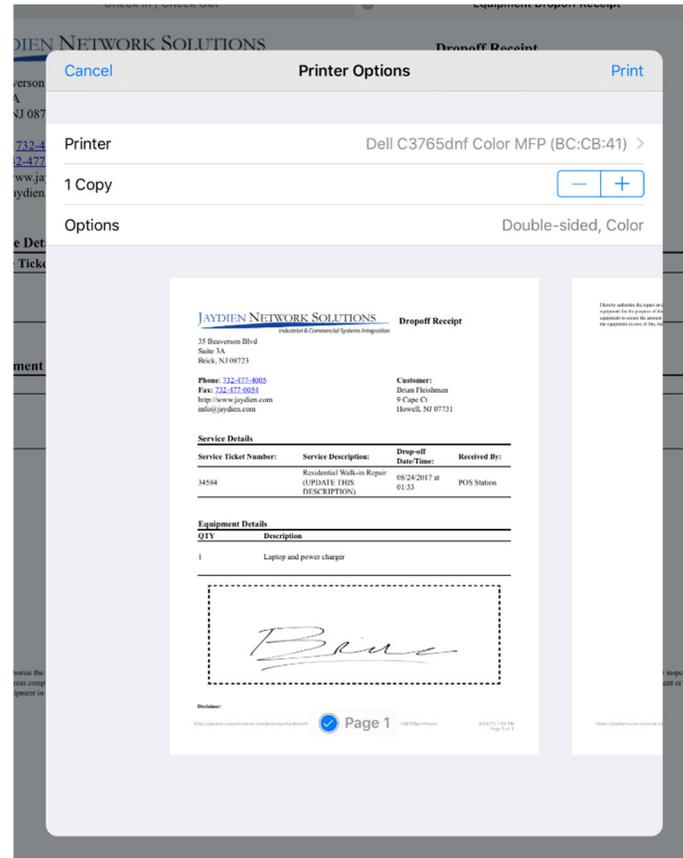
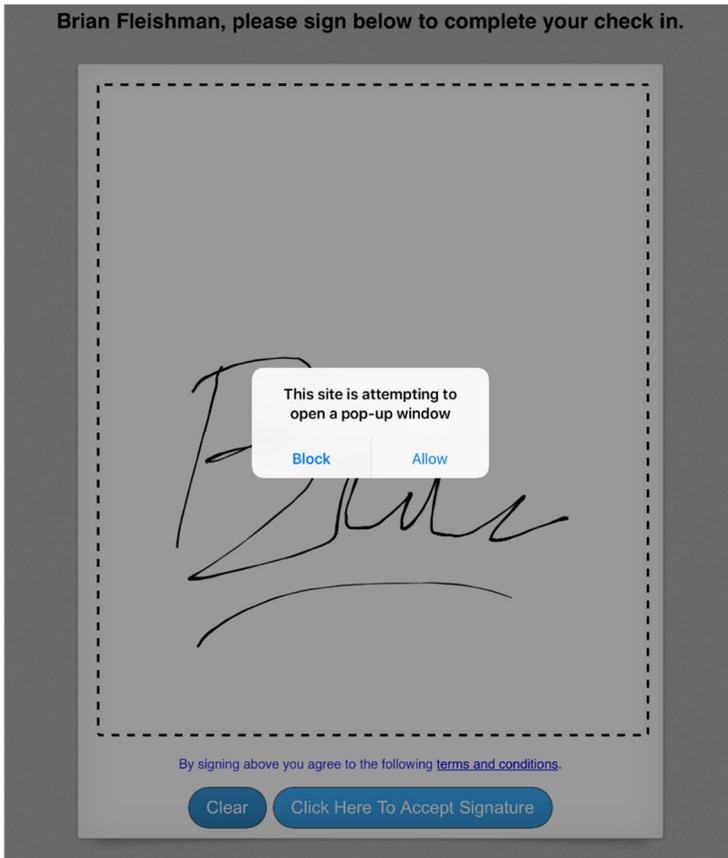
Signage

Previous Finish

7. Have the customer record their signature by drawing directly on the iPad screen. This authorizes us to perform service on their equipment. When finished, click the button **Click Here To Accept Signature**.



8. You will then see a pop-up asking you to allow or block the pop-up for the receipt. Press **Allow** and then receipt tab will automatically open and ask you to select a printer.



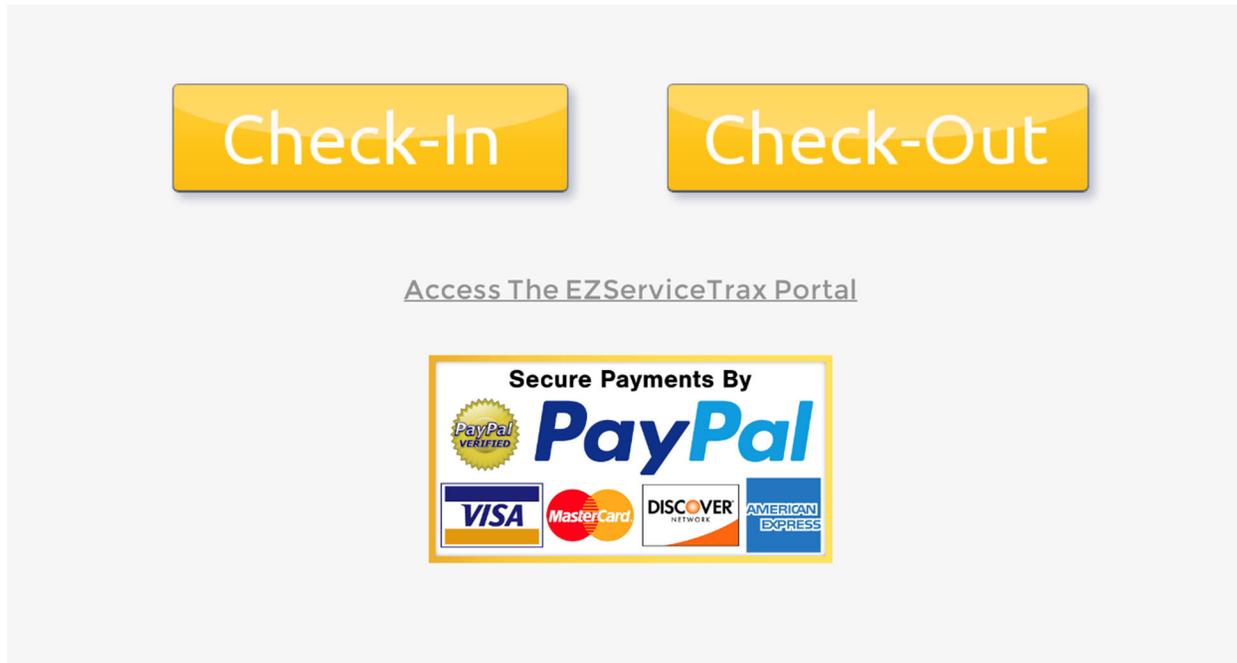
9. After printing the receipt, you will see 2 open tabs in the web browser. You can close the tab with the receipt so that you only see the main check-in / check-out tab.

Check In / Check Out		Equipment Dropoff Receipt	
JAYDIEN NETWORK SOLUTIONS <i>Industrial & Commercial Systems Integration</i>		Dropoff Receipt	
35 Beaverson Blvd Suite 3A Brick, NJ 08723			
Phone: 732-477-4005 Fax: 732-477-0054 http://www.jaydien.com info@jaydien.com		Customer: Brian Fleishman 9 Cape Ct Howell, NJ 07731	
Service Details			
Service Ticket Number:	Service Description:	Drop-off Date/Time:	Received By:
34584	Residential Walk-in Repair (UPDATE THIS DESCRIPTION)	08/24/2017 at 01:33	POS Station
Equipment Details			
QTY	Description		
1	Laptop and power charger		
			

Disclaimer:
I hereby authorize the repair or diagnostic work stated above along with any necessary materials. You and your employees may use the above state computer equipment for the purpose of diagnosing, testing, repairing or inspection at my risk. An express computer repair technician's lien is acknowledged on the above equipment to secure the amount of repairs or diagnostics thereto. You will not be held responsible for loss or damage to the above equipment or articles left with the equipment in case of fire, theft, accident, hardware failure or defect or any other cause beyond your control.

Checking Out A Customer

1. Choose **Check-Out** from the main screen.



2. Choose the customer from the dropdown list.

Please Select Your Name From The List.

Please make a selection

- Please make a selection ✓
- Dennis McKeown
- Sal Rispoli
- Ron Zygmumd
- Peter Langwoth
- Randy levee
- Brian Fleishman
- Joanne Atkins-Ingram
- Nancy Tancona

3. Enter the Amount the Customer is paying. Then Select Credit Card From The Dropdown List And Press The PayPal Button. If there is no money, to collect, **skip to step 8.**

The screenshot shows a mobile payment interface with a light blue background and orange vertical bars on the sides. At the top, the status bar displays 'Verizon', signal strength, '3:19 PM', and '80%' battery. The URL 'jaydien.ezservicetrax.com' is visible in the browser address bar.

Step1: Payment Amount

1.00

This amount can be changed in order to make a partial payment.

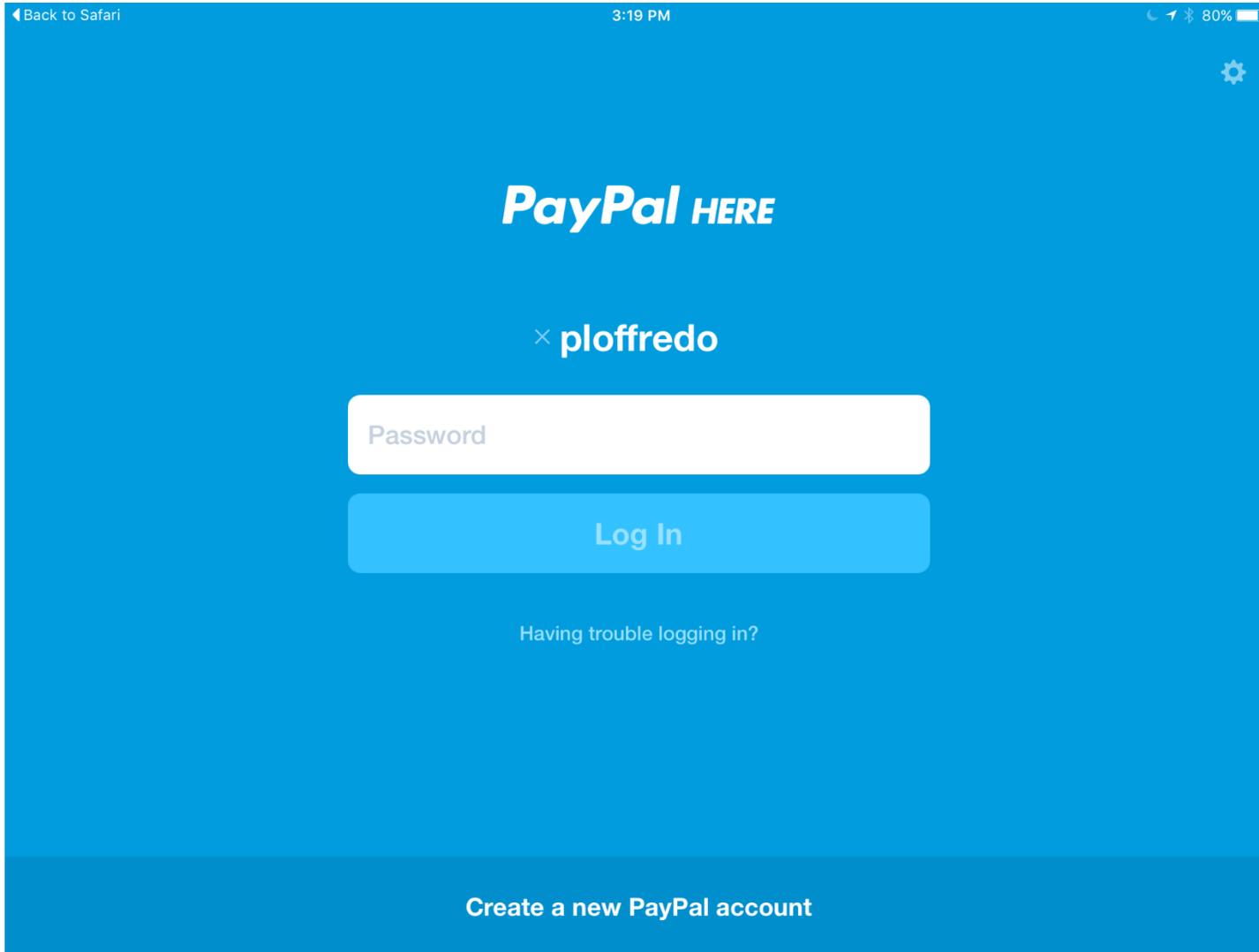
Step2: Payment Information

Credit Card

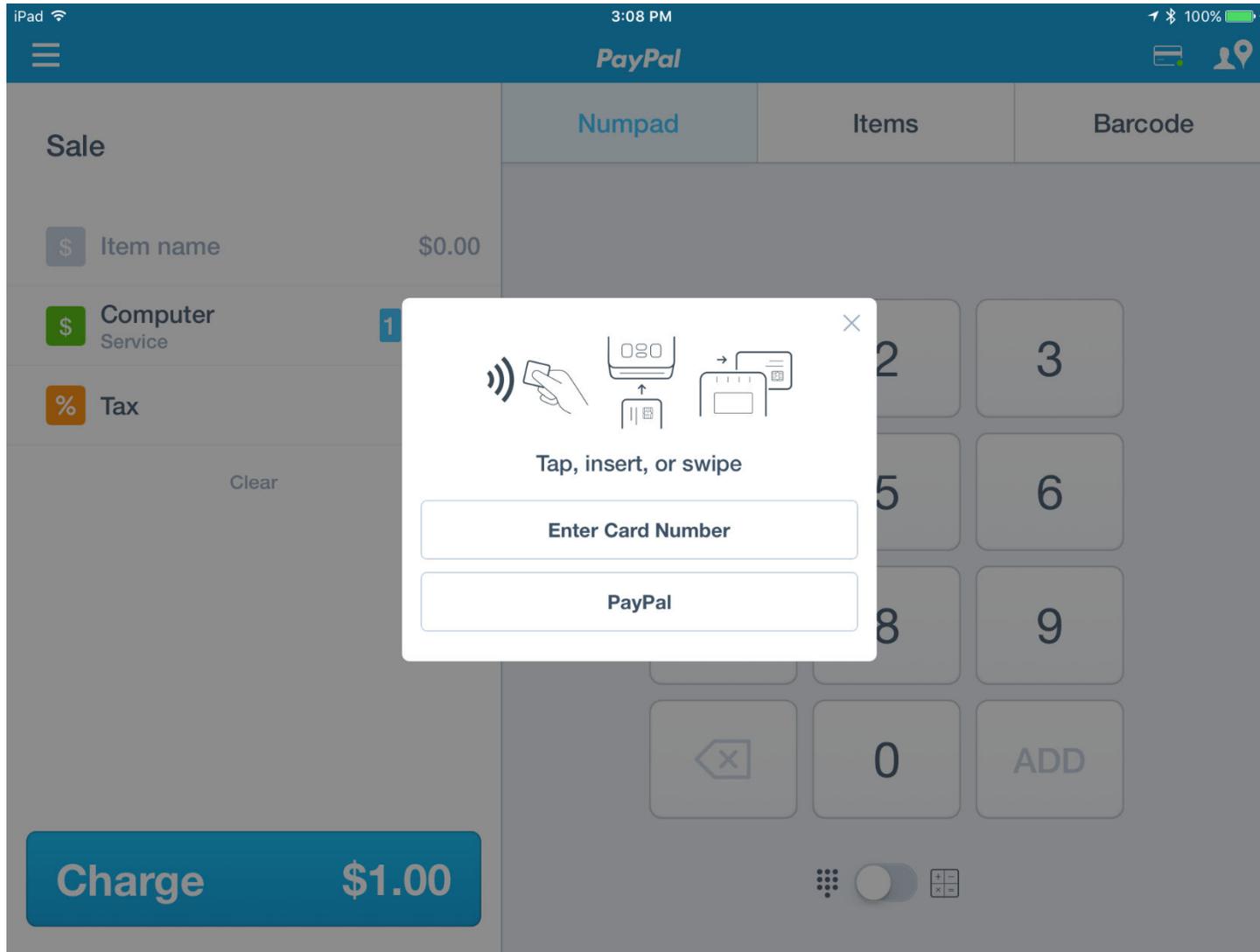
Check out with **PayPal**

Step3: Customer Authorization

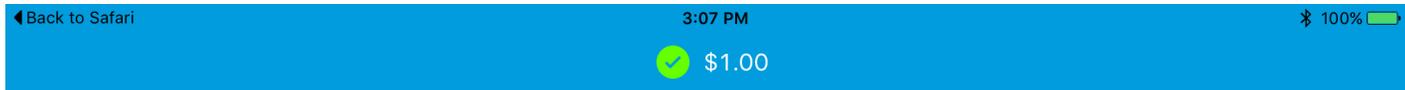
4. Then PayPal App Will Then Prompt You to Open Up. **Choose Open.** You May Also Be Prompted to Login to the App. (**Username: SupportAccount Password: Jaydien@2002**)



5. You Can Now Swipe The Credit Card. If it is a Chip Card, Insert the Chip into the Bottom of the Card Reader. (You May Need To Remove the USB Cable to Get a Successful Card Swipe)



6. Once The Card Is Approved, You Will See The Following Confirmation Screen. **Select The Email Address payments@jaydien.com To Send a Copy of the Sale to Pam.**



Payment Complete

Would you like a receipt?

payments@jaydien.com

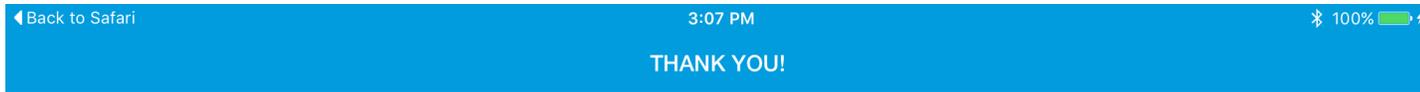
(732) 477-4005

No receipt

Receipts will be delivered by PayPal. See your receipt for PayPal's [Privacy Policy](#)



7. Once The Receipt Is Successfully Sent, You Will See The Following Confirmation Screen. **Select New Sale** And You Will Be Taken Back To The Checkout System.



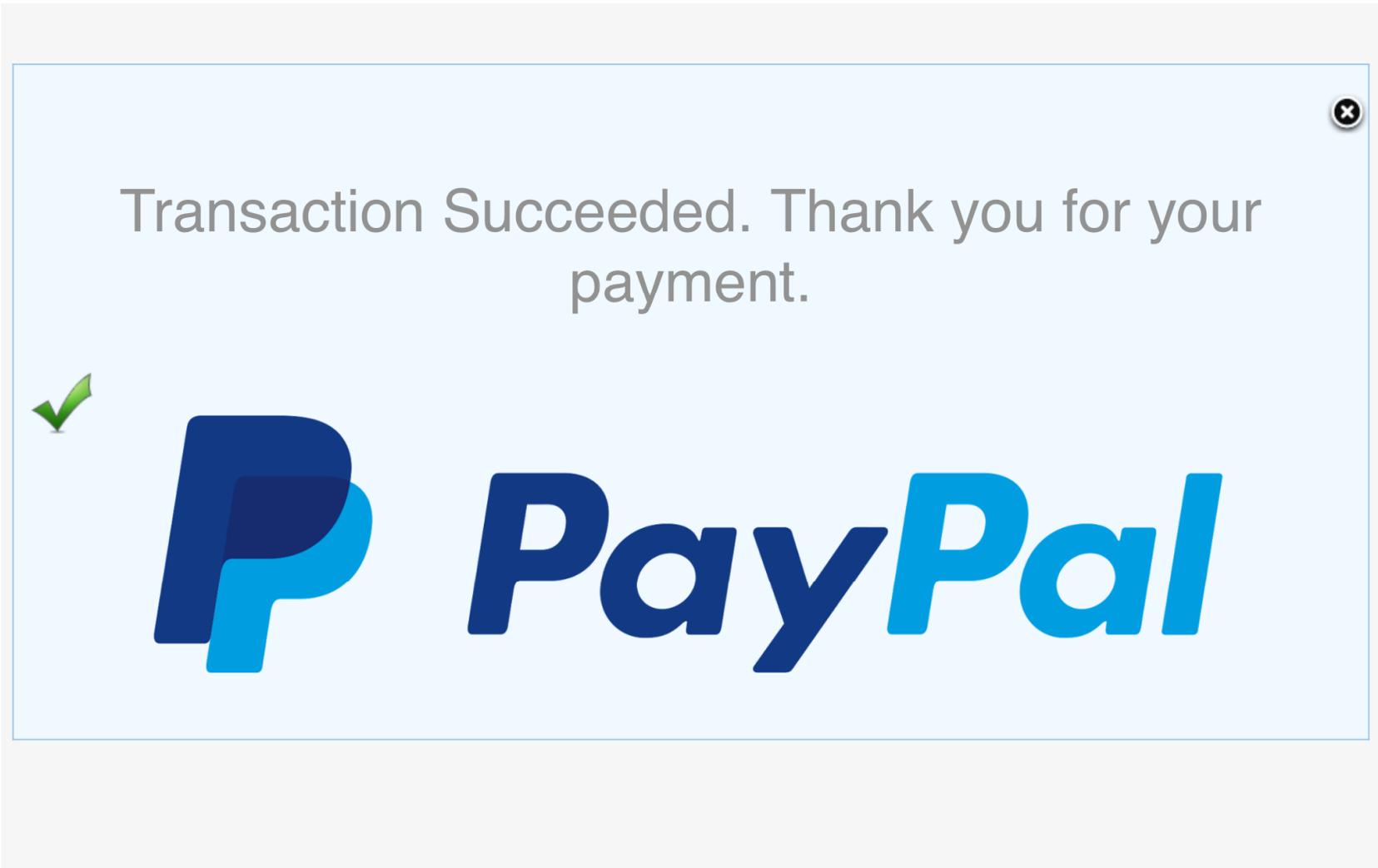
Your receipt has been sent



New Sale

Save Customer Information

8. You Will Then See A Confirmation Screen From The POS Systems.



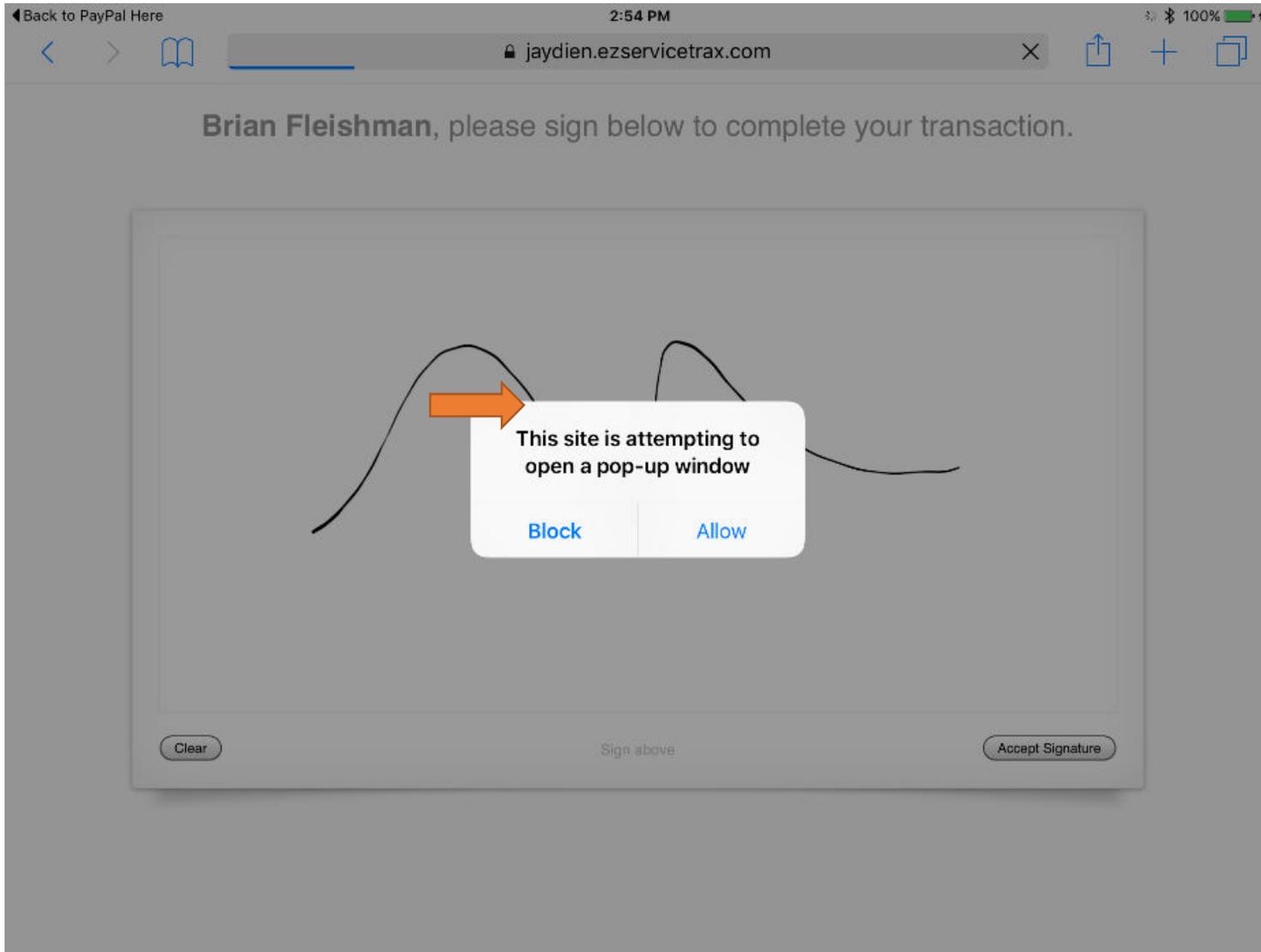
9. Now You Can Capture the Customer Authorization Signature for the Work Performed or To Order Equipment by selecting the **Click Here To Sign Button**

Step3: Customer Authorization

[Click Here To Sign](#)



10. After you capture the signature, press the **Accept Signature** button. The system will save the signature and open up a new tab with the **customer receipt** to be printed. *Please note you will have to press **Allow** in order for the receipt to be displayed in the new tab.*



11. Once the customer receipt appears, a **print diaplogue window** should automatically pop-up so you can print the receipt.

Back to PayPal Here 2:54 PM
 jaydien.ezservicetrax.com

Check In / Check Out Print Ticket

JAYDIEN NETWORK SOLUTIONS
 Industrial & Commercial Systems Integration

Customer In
 Brian Fleishar
 9 Cape Ct Ho

Jaydien Network Solutions, LLC.
 35 Beaverson Blvd
 Suite 3A
 Brick, NJ 08723

Phone: 732-477-4005
 Fax: 732-477-0054
 http://www.jaydien.com
 info@jaydien.com

732-987-4193

Job Info:
 Trouble Rep:
 Ticket Num:
 Date of Servi:
 Service Type:
 Technician: I

Labor

Line ID	Service Qty	Travel Qty	Hourly Rate	Detail of Service Work Performed
[1]	1	0	\$ 1.00	
[2]	0	0	\$ 0.00	
[3]	0	0	\$ 0.00	
[4]	0	0	\$ 0.00	
Total Service Charge:			\$1.00	

Charges

Total Service Charge:	\$1.00
Total Material Charge:	\$0.00
(Discounts):	(\$0.00)

Back to PayPal Here 2:54 PM
 jaydien.ezservicetrax.com

Check In / Check Out Print Ticket

JAYDIEN NETWORK SOLUTIONS
 Industrial & Commercial Systems Integration

Jaydien Network Solutions, LLC.
 35 Beaverson Blvd
 Suite 3A
 Brick, NJ 08723

Phone: 732-477-4005
 Fax: 732-477-0054
 http://www.jaydien.com
 info@jaydien.com

Labor

Line ID	Service Qty	Travel
[1]	1	0
[2]	0	0
[3]	0	0
[4]	0	0
Total Service Charge:		

Charges

Total Service Charge:	\$1.00
Total Material Charge:	\$0.00
(Discounts):	(\$0.00)

Printer Options Cancel Print

Printer: Dell C3765dnf Color MFP (BC:CB:41) >

1 Copy [- +]

Options: Double-sided, Color

Preview of receipt showing labor and charges sections.

Page 1