3– Open Order

Last Sync:
Open Order   Order# 20353
Account # WINK
Winkler Inc
535 E. Medcalf St. Dale IN
Contact: Bill 812-937-4421 x259
Fix something

Travel to Job Site
Start Travel Time to Appointment

Arrive / Clock in On-Site
Arrived On-Site at Appointment

Appointment Wizard
Ord: 20353 Complete or Review Appointment Work (Wizard)

Show Customer's Orders History
Show additional Orders/ Invoices for

Customer
Information about

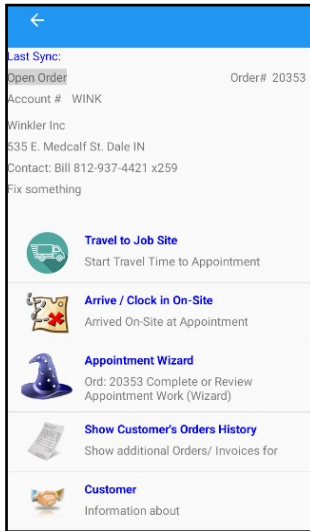## Travel and Arrive

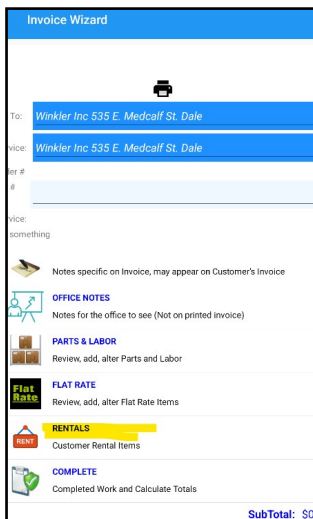You can log Travel time by tapping Travel to Site

Tap Arrive when you have arrived at the site

Tap Appointment Wizard

Verify address
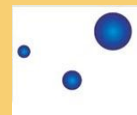Tap Rentals

Office, Invoice Notes and PO# can be filled in at any point

Invoice Wizard

To: Winkler Inc 535 E. Medcalf St. Dale
vice: Winkler Inc 535 E. Medcalf St. Dale
er #
#
vice:
something

Notes specific on Invoice, may appear on Customer's Invoice

OFFICE NOTES
Notes for the office to see (Not on printed invoice)

PARTS & LABOR
Review, add, alter Parts and Labor

FLAT RATE
Review, add, alter Flat Rate Items

RENTALS
Customer Rental Items

COMPLETE
Completed Work and Calculate Totals

SubTotal: $0

For more details visit

https://tinyurl.com/TrakkerRentals

Longwell Technologies

PO Box 192
Trevor, WI 53179

Web: www.LongwellTrakker.com

Route Sales Trakker

Quick Start

For Rental Services with Appts

Route Sales Trakke

Last Sync: 3:42 PM   Warehouse (ver. 2023.3.12.0413) Longwell

SCHEDULE
Your list of Appointments

CUSTOMERS
List of Customers

INVENTORY
View all items with qty available on truck

REPORTS
List of Reports

END OF DAY
Notifies office and runs clean up procedures Last Run: 1/1/2000 12:00:00 AM

SYNCHRONIZE
Review last Synchronize Times
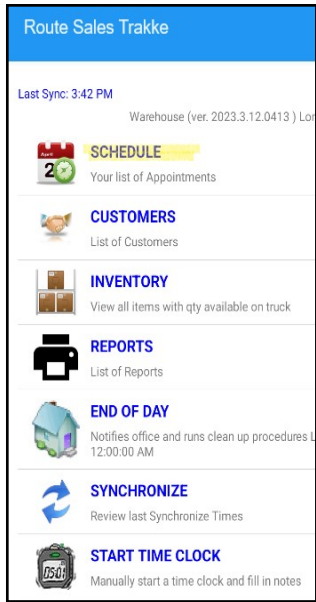
START TIME CLOCK
Manually start a time clock and fill in notes
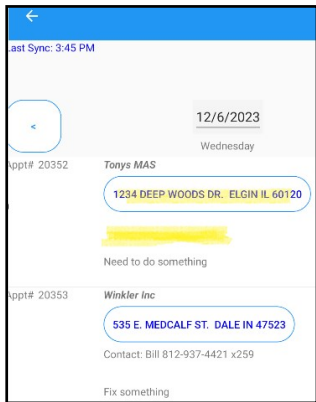
Longwell Technologies, Inc.

www.LongwellTech.com

1– Open Schedule
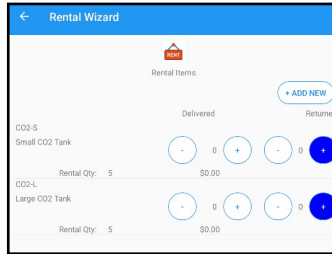

2– Find Appt

Tap the Address to open Google Maps for Turn by Turn directions

Tap Inside the Appointment Box to open the Appointment Details

4– Fill in Rentals

Blue + will add 1 to both Return & Delivery Side. All other +/- only change the related qty.
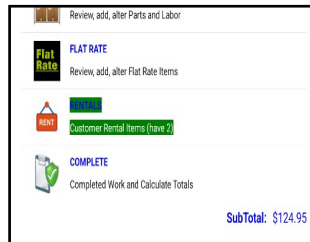

Totals will automatically add up on the bottom

ADD NEW can be use add a new rental item to the customer
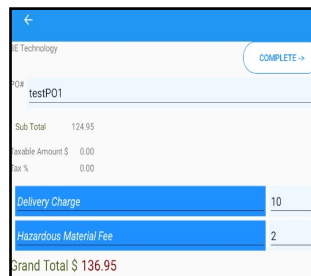
Hit Back when done.

5– Complete

Hit Complete
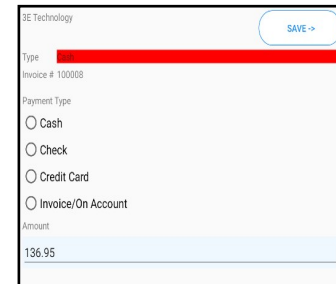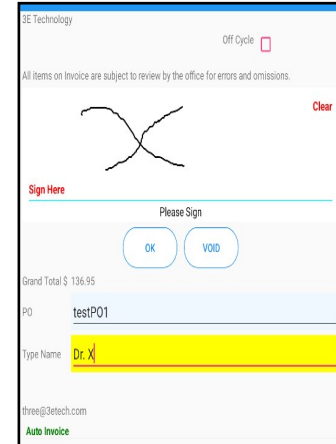
Review Totals

Hit Complete

6– Sign & Collect

Get Signature
Type Name

Review Auto Invoice (Email address) with customer
Tap OK

Select Payment Method

Tap SAVE

Tap DONE

This will return to Schedule

You are ready to start the next Appt