



GAS-TRAK ONLINE

# USER GUIDE

## HOW TO ADD A CUSTOMER, SITE AND EQUIPMENT



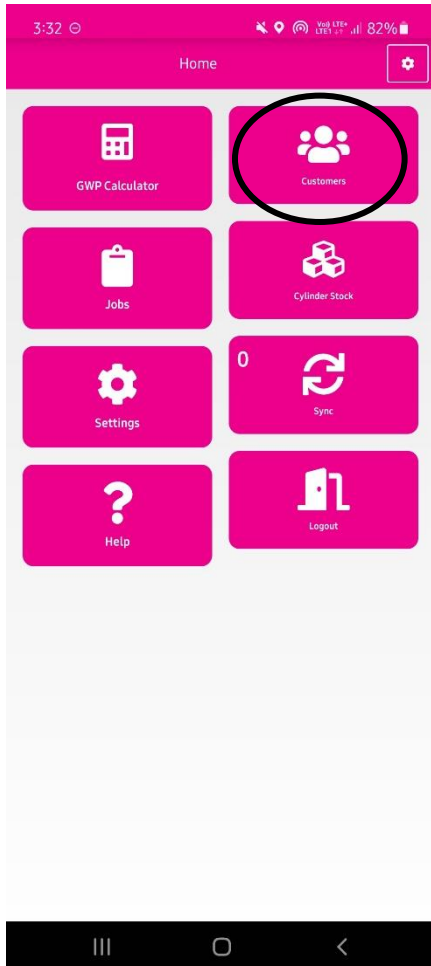
Your Cylinder Tracking, Reporting  
and Stock Management Solution.



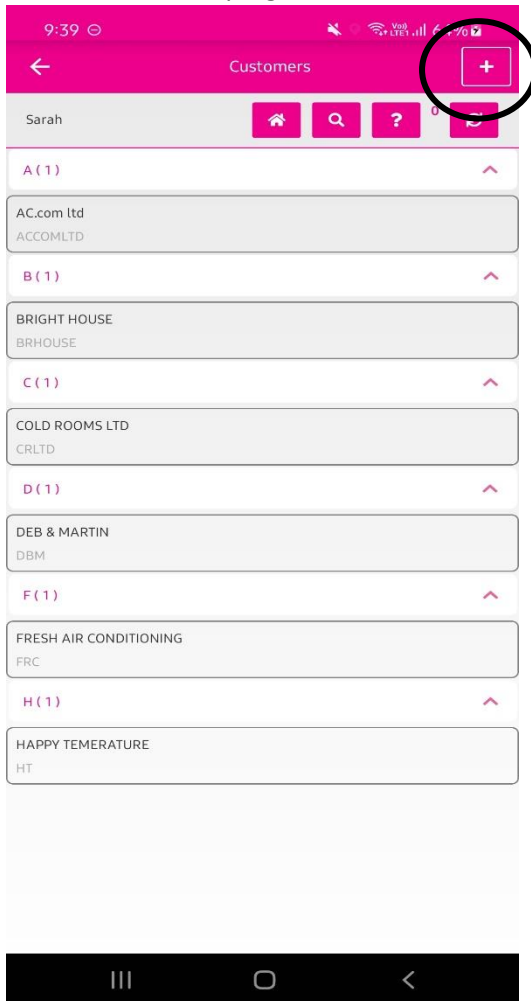
**HOW TO ADD A CUSTOMER, SITE AND EQUIPMENT**

**How to add a Customer**

1. Click on **Customer** icon



- Click on + in the top right-hand corner



- Type in the Customer's name in the field by **Name**
- Click in the account code if needed for example the account number (this is an optional field).
- Click on the **save** icon in the top right-hand corner

9:39

Customer

Sarah

Name

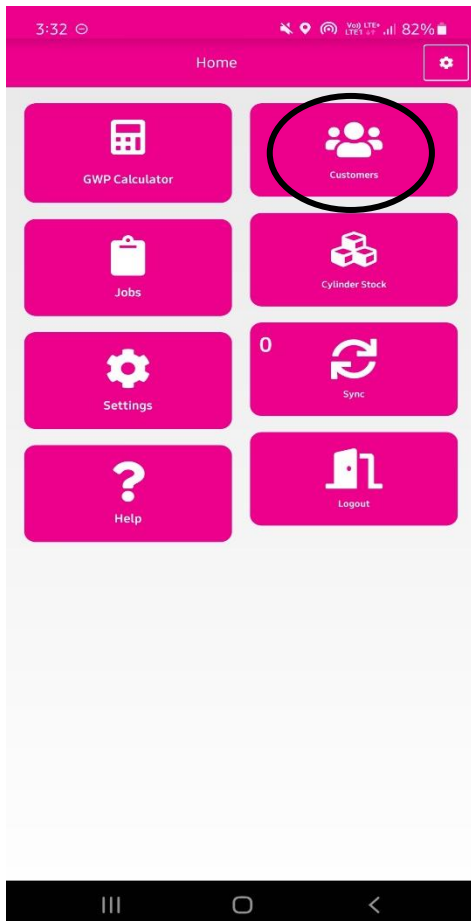
Account Code

Done

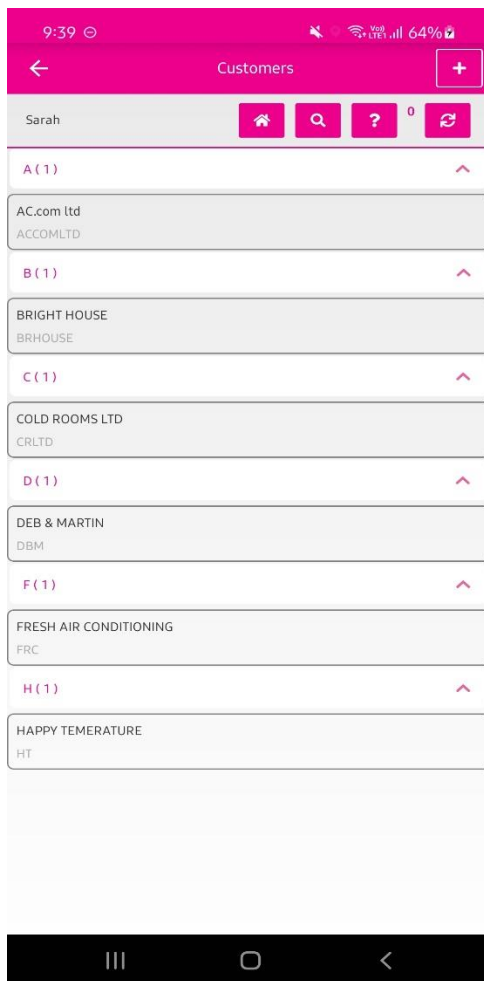
## How to add a site

The only mandatory field that needs filling out is the site name

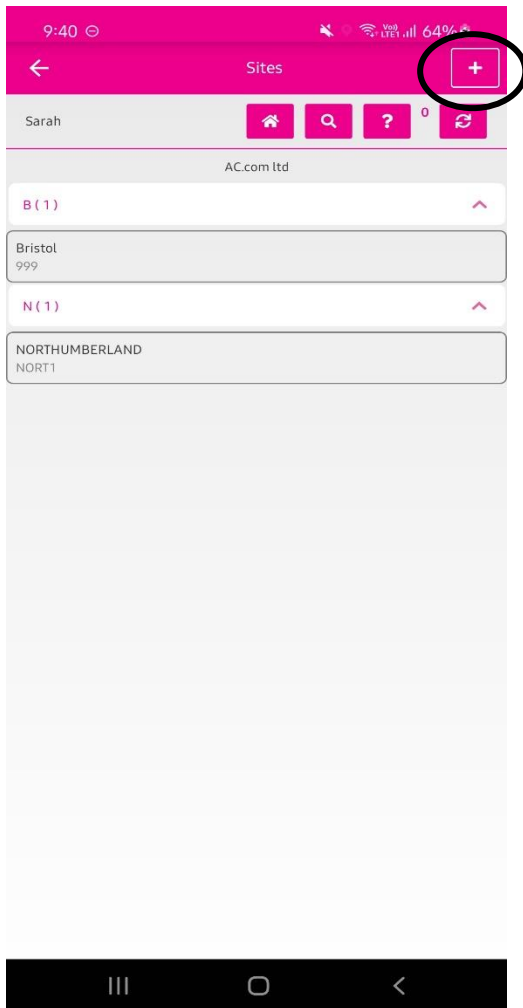
1. Click on **Customer** icon



2. Click on the Customer you wish to add a site too.



3. Click on the + in the top right-hand corner.



4. Click in the field by **Site** and enter the Site name 5. Click **Done**

The screenshot shows the 'Site' form in the Gas-Trak Online mobile app. The form is titled 'Site' and has a back arrow on the left and a save icon on the right. Below the title bar, there is a user profile section for 'Sarah' with icons for home, help, and a notification bell. The form fields are: Site Name (with a cursor), Site ID, Contact Name, Contact Telephone, Street 1, Street 2, and Town. A keyboard is visible at the bottom, and the letter 'U' is circled, indicating the next step in the process.

6. Click in the field by **Site id** enter details
7. Click on **contact name** and enter details
8. Click on **Contact telephone** and enter details
9. Click on **Street 1** enter details
10. Click on **street 2** enter details
11. Click on **Town** enter details
12. Click on **County** enter details
13. Click on **Postcode** enter details
14. Click on the **save** icon in the top right-hand corner



9:42 9:42 Site

Sarah

Site Name  
BRISTOL

Site ID  
BRIS

Contact Name  
Deb

Contact Telephone

Street 1  
ST 1

Street 2

Town  
BRISTOL

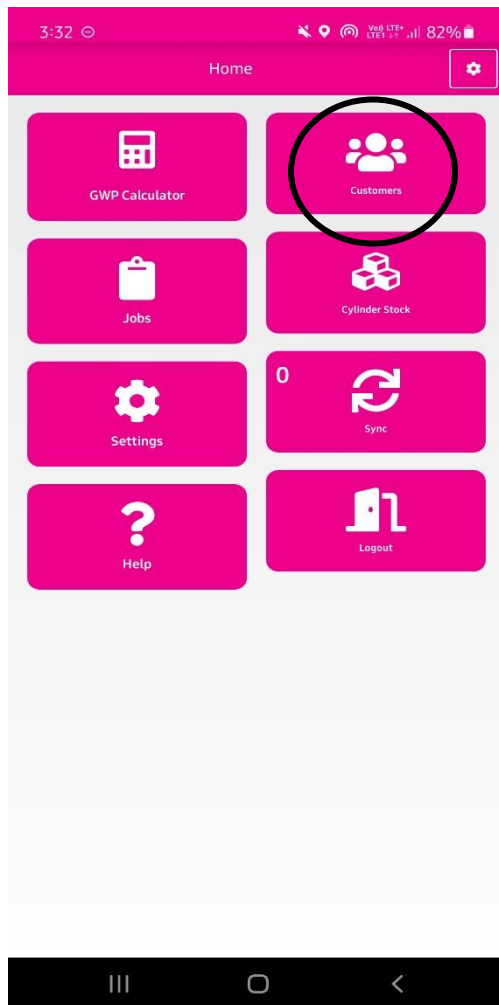
County

Country

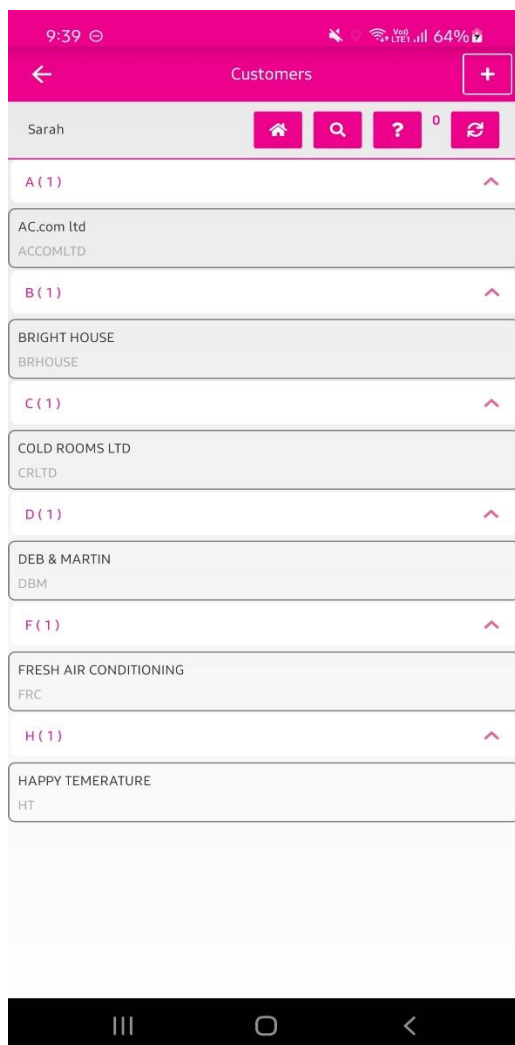
Postcode

### How to create equipment

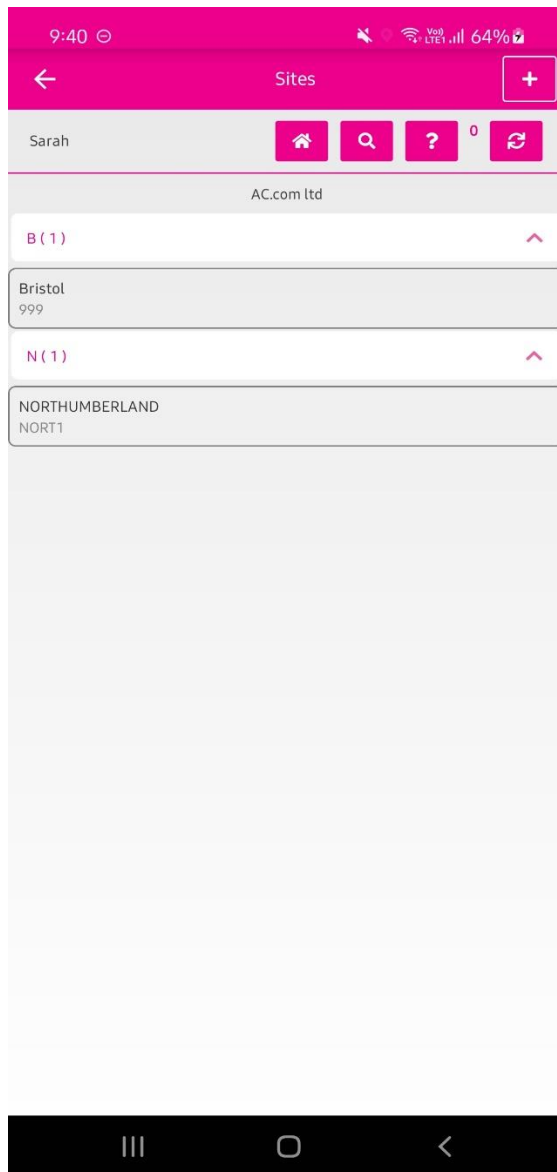
1. Click on **Customer** icon



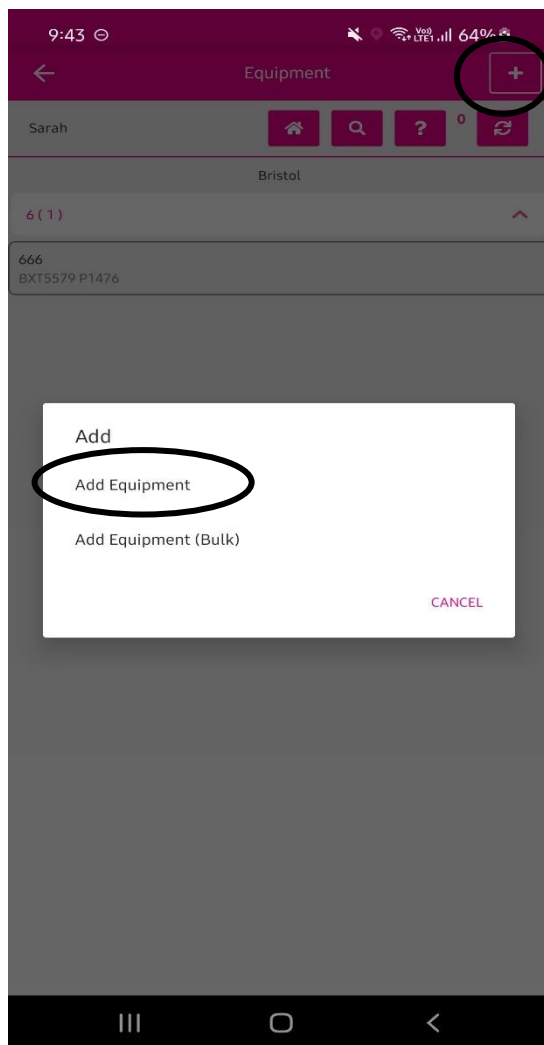
- Click on Customer you wish to add the equipment for. (if you can't find the Customer, follow the instructions for adding a Customer)



3. Click on the Site you wish to add the equipment for. (If you can't find the site, follow the instructions for adding a site)



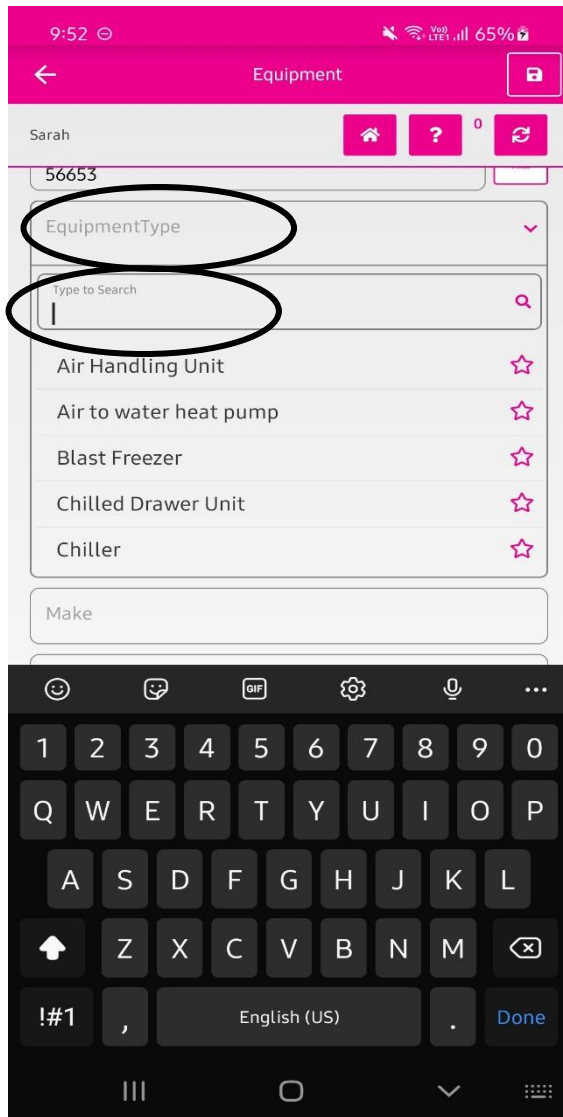
4. Click on + in the top right-hand corner and then click Add Equipment.



5. Click on **Equipment id** and enter this manually or click on the bar code scanner and scan the bar code.
6. If entering manually click on **Done**

The image shows two screenshots from a mobile application. The top screenshot is the 'Equipment' form, which has a pink header bar with a back arrow, the title 'Equipment', and a save icon. Below the header, the user's name 'Sarah' is displayed next to three icons: a home icon, a question mark icon, and a refresh icon. The form contains several input fields: 'Equipment ID' with the value '56653' and a barcode scanner icon to its right; 'EquipmentType' with a dropdown arrow; 'Make' with a text input field; 'Model' with a text input field; 'Serial Number' with a text input field and a barcode scanner icon to its right; 'Charge' with the value '0'; and 'Product' with a dropdown arrow. The bottom screenshot shows a standard QWERTY keyboard with the 'Done' button in the bottom right corner highlighted with a white circle. The text '56653' is visible in the address bar above the keyboard.

- Click on equipment type and scroll through to pick your piece of equipment and click on it. Alternatively click on the search box and type in the piece of equipment you are looking for and click on it. (Swipe on frequently used product item and click on star icon to mark an item as favourite)



8. Click on the **Make** and enter details.
9. Click on **Model** and enter details

The screenshot shows the 'Equipment' form in the Gas-Trak Online mobile app. The form fields are as follows:

- Equipment ID:** 56653
- EquipmentType:** Air Handling Unit
- Make:** DAIKIN
- Model:** DAIKIN 1
- Serial Number:** (empty)
- Charge:** 0
- Product:** (empty)

A keyboard is overlaid on the bottom half of the screen, with the 'Done' button circled in white. The status bar at the top shows the time as 9:52 and battery level at 65%.



10. Click on **Serial number** and enter this manually, click **Done**. Or click on the bar code scanner and scan the bar code.

The image shows a mobile application interface for 'Gas-Trak Online'. The top status bar shows the time 9:52, signal strength, and 65% battery. The app header is pink with a back arrow, the title 'Equipment', and a save icon. Below the header, the user's name 'Sarah' is displayed next to three icons: a home icon, a question mark, and a refresh icon. The main form contains several input fields: 'Equipment ID' with the value '56653' and a barcode scanner icon; 'EquipmentType' with a dropdown menu showing 'Air Handling Unit'; 'Make' with the value 'DAIKIN'; 'Model' with the value 'DAIKIN 1'; 'Serial Number' with the value '566666' and a barcode scanner icon; 'Charge' with the value '0'; and 'Product' with a dropdown menu. Below the form, a keyboard is visible with the number '566666' entered in the address bar. The 'Done' button on the keyboard is circled in red.

11. Click on the **0** by charge and enter it. **The charge must be what the manufacturer has stated on the id plate.**
12. Click **Done**
13. Click on product to scroll through until you find it and click on it. Or alternatively click on the search box and type the product you are looking for and click on it.

9:53

Equipment

Sarah

56653

EquipmentType  
Air Handling Unit

Make  
DAIKIN

Model  
DAIKIN 1

Serial Number  
566666

Charge  
3

Product

Type to Search

ACETYLENE

ARGON

CARE 30

CARE 50

Glycol

Decommission ID

Area

9:54

Equipment

Sarah

56653

EquipmentType  
Air Handling Unit

Make  
DAIKIN

Model  
DAIKIN 1

Serial Number  
566666

Charge  
3

Product  
R401A

Decommission ID

Area

14. DECOMMISSIONED ID you do not enter anything here.

15. Click on **Area** and enter the location of the piece of equipment 18. Click **Done**

The screenshot shows the Gas-Trak Online mobile app interface. The top status bar displays the time 9:55, signal strength, and 65% battery. The app form contains the following fields: Equipment ID (56653), EquipmentType (Air Handling Unit), Make (DAIKIN), Model (DAIKIN 1), Serial Number (566666), Charge (3), Product (R401A), and Decommission ID. The 'Area' field is currently empty and is circled in black. A keyboard is open at the bottom of the screen, and the 'Done' button is circled in white.

19. Click **save** in the top right-hand corner

The screenshot shows the 'Equipment' form in the Gas-Trak Online mobile app. The form is displayed on a white background with a blue header bar. The header bar contains a back arrow, the title 'Equipment', and a blue square button with a white save icon, which is circled in red. Below the header bar is a grey bar with the name 'Sarah' and three icons: a home icon, a question mark icon, and a refresh icon. The form itself consists of several input fields with labels and values: 'Equipment ID' (56653), 'EquipmentType' (Air Handling Unit), 'Make' (DAIKIN), 'Model' (DAIKIN 1), 'Serial Number' (566666), 'Charge' (3), 'Product' (R401A), 'Decommission ID', and 'Area' (OUTSIDE). Each input field has a small blue square button with a white save icon to its right. The bottom of the screen shows a black navigation bar with three icons: a list icon, a home icon, and a back arrow.

9:55

Equipment

Sarah

Equipment ID  
56653

EquipmentType  
Air Handling Unit

Make  
DAIKIN

Model  
DAIKIN 1

Serial Number  
566666

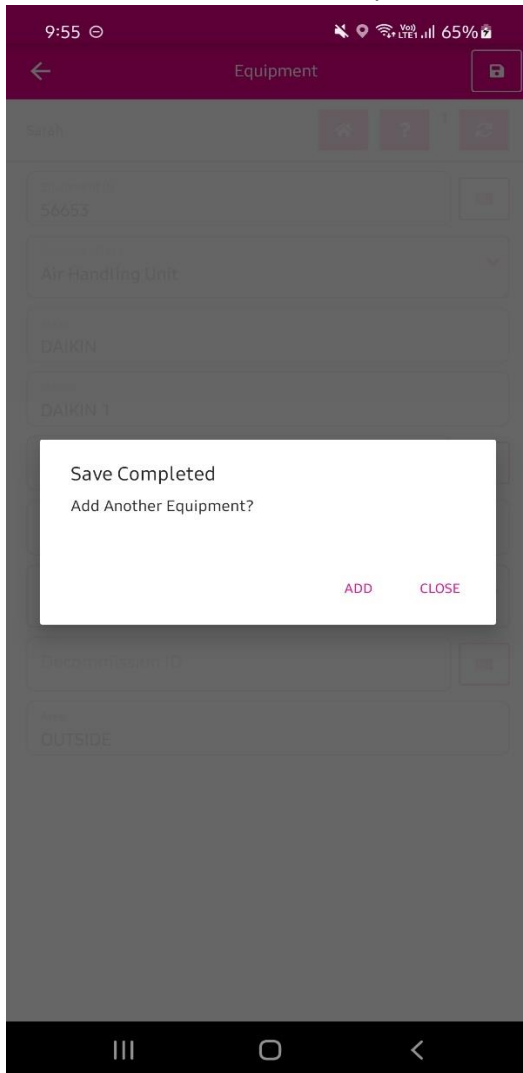
Charge  
3

Product  
R401A

Decommission ID

Area  
OUTSIDE

20. Click on **close** if finished or add if you wish to add more equipment to the site.





## YOUR GAS-TRAK ONLINE SUPPORT TEAM:

*Phone: +44 (0) 1275 376600*

*Email: [support@gastrakonline.com](mailto:support@gastrakonline.com)*

*Web: [www.gastrakonline.com](http://www.gastrakonline.com)*



Your Cylinder Tracking, Reporting  
and Stock Management Solution.

