

ServiceLedger 2009

Getting Started Guides



Getting Started with the Dispatch Manager

This guide will document how to use the ServiceLedger Dispatch Manager to manage and dispatch resources on jobs.

Introduction:

Dispatching and tracking your resources is one of the most crucial processes of ServiceLedger. ServiceLedger makes it easy to dispatch your resources and track their whereabouts at anytime throughout any given day. Dispatching and tracking your resources are performed using the Dispatch Board. *Note: It is assumed that you have read the Getting Started With Scheduling documentation and understand the scheduling options available to you.*

The Dispatch Board will allow you to see what jobs are scheduled for a resource, what jobs have been completed, tracking dispatch statuses (i.e. where your resources are at), printing or emailing of work orders and more.

Dispatching Options:

You have several options available to you when dispatching your resources. How you dispatch is up to you and what works best for your organization.

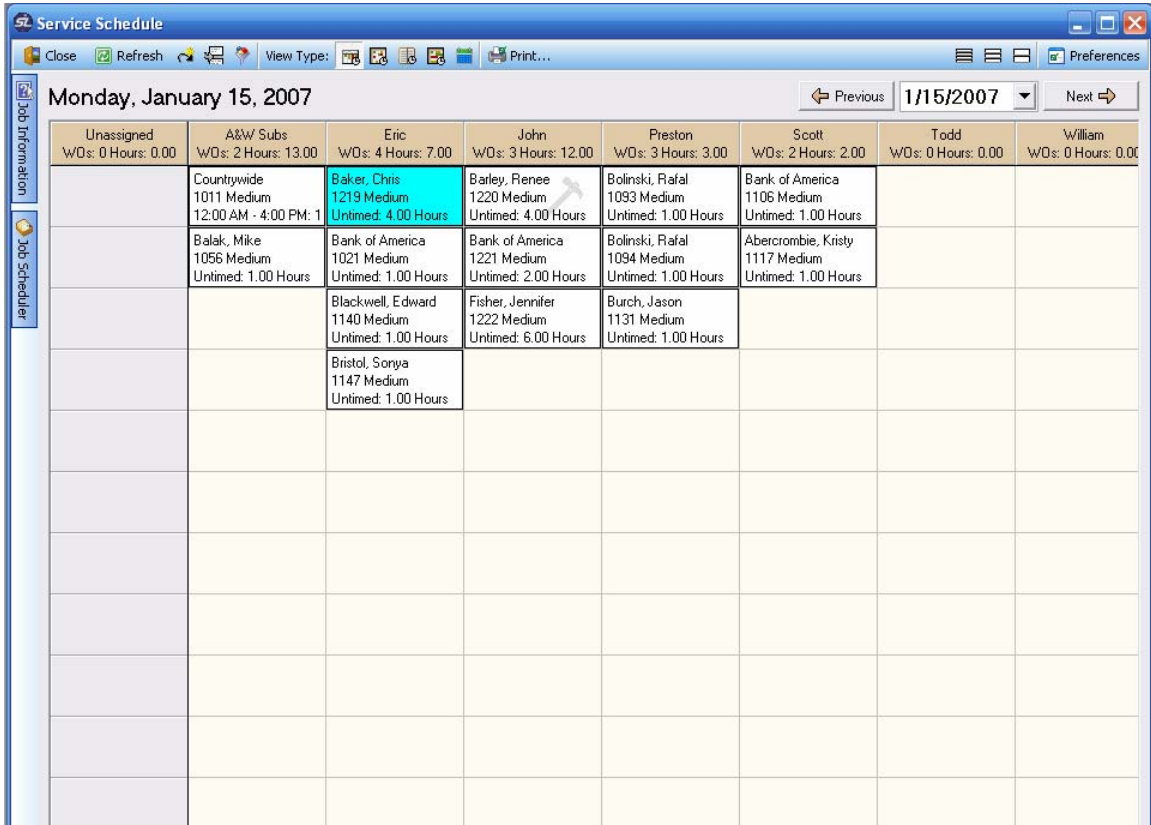
Your dispatching options are:

1. **Printing Work Orders** – the printing of the work orders in paper-form and providing to your resources.
2. **Emailing Work Orders** – the emailing of either a PDF of the work order or a text message to a cell phone. This can be done using the email notification feature of ServiceLedger too.
3. **Phone Dispatch** – calling your resources to inform them of a job out in the field.
4. **Tech Web Portal** – allowing resources to login to the Tech Web Portal to access and retrieve job information over the Internet and updating jobs over the Internet. This is used in conjunction with email notification to alert resources of new jobs assigned or scheduled to them. Additional licensing applies for the Tech Web Portal. See **Getting Started with the Tech Web Portal** for more information on this feature.
5. **Mobile Synchronization** – this allows resources to synchronize their mobile device with your server to retrieve jobs assigned or scheduled to them, allow them to update the jobs out in the field and synchronize at a later time back to the server with the updated job information and downloading new jobs. Additional licensing applies for ServiceLedger Mobile. See **Getting Started with ServiceLedger Mobile** for more information on this feature.

The Dispatch Board:

Click on **Dispatch Board** from the **Navigator** to open the Dispatch Board. The Dispatch Board will display all of your resources and all jobs assigned to or scheduled for a resource on the current day. You can change the day using

either the **Previous** or **Next** button, or selecting a date using the drop-down calendar option.

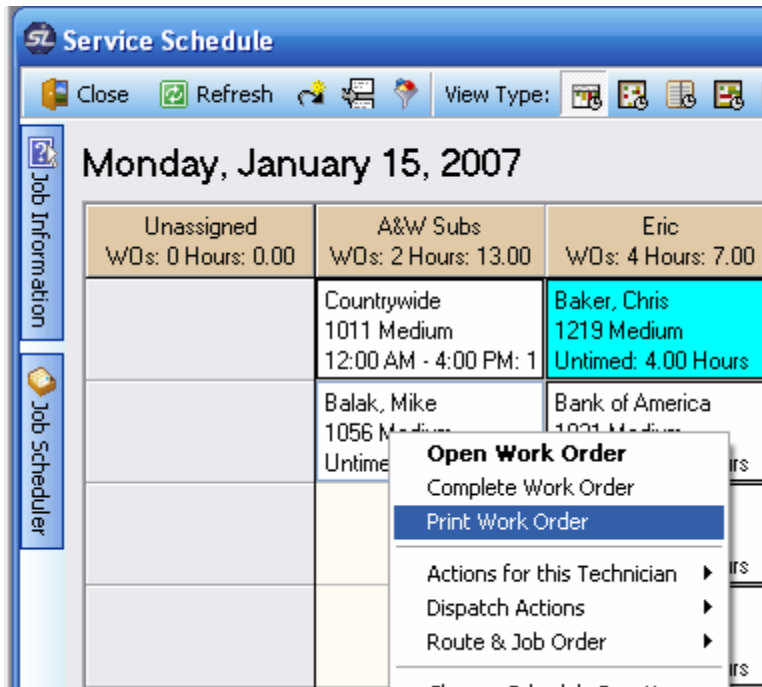


Printing Work Orders:

You have the option of printing all work orders for all resources on the given day or printing each work order individually. To print all work orders, click on the Print button and select the Print All Work Orders option. This will print all work orders for all resources on the day selected.



If you want to print an individual work order, click on the cell where the work order is located and right-click your mouse and select the **Print Work Order** option.



Emailing Work Orders:

Like printing work orders, you have an option to email all work orders to all resources for the given day or emailing each work order individually. In order to use this feature, you must define the email address of each resource under the resource record in ServiceLedger.

To email all work orders to all resources, click on the **Print** button and select the **Email All Work Orders** option.



If you want to email an individual work order, click on the cell where the work order is located and right-click your mouse and select the **Dispatch Options | Send to Technician | Email** option. You have the option of emailing a PDF of the work order or emailing as plain text.

The screenshot shows the 'Service Schedule' application window. The title bar includes 'Close', 'Refresh', and 'View Type' options. The main area displays a grid for 'Monday, January 15, 2007'. The grid columns represent technicians: Unassigned, A&W Subs, Eric, John, Preston, and another technician. The rows represent work orders with details like location, technician, and duration. A context menu is open over the work order for Baker, Chris at 1219 Medium, listing actions such as 'Open Work Order', 'Dispatch Actions', and 'Send to Technician'.

Phone Dispatch:

All the job information you require should be available on the Dispatch Board, however you always have an option to open a work order if you require additional information by double-clicking on any work order to open the work order record. If you hover your mouse pointer on any job, you will get the **Job Summary** pop-up window that will summarize the job address and phone information for you. If you are going to dispatch by telephone, the phone number for the job is located in the **Job Summary** pop-up window or **Job Information** panel.

Balak, Mike 1056 Medium Untimed: 1.00 Hours	Bank of Am 1021 Medi Untimed: 1.
Balak, Mike 1056 Medium Untimed: 1.00 Hours Mike Balak 8753 S. Mountain View Bayshore, CA 94326 (415)555-6636	

Or you can use the **Job Information** panel to get more information about the job. You can stick the **Job Information** panel by clicking on the button to the far-right of the **Job Information** panel.

You can click on any cell with a work order and the **Job Information** panel will update automatically with work order information for that specific job.

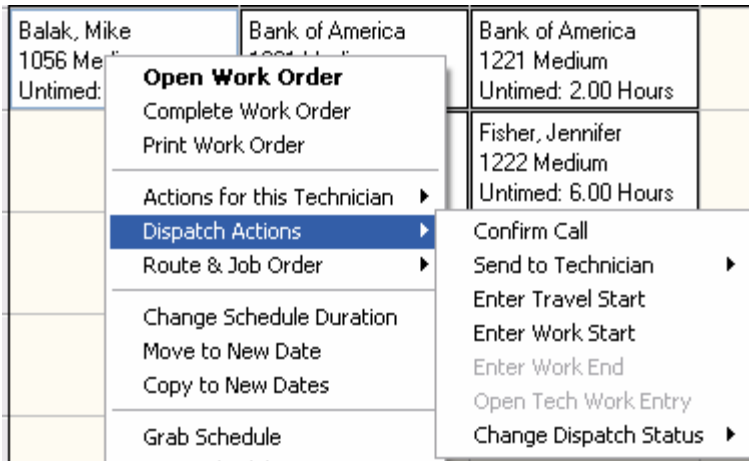
Job Information	
Account	Balak, Mike
Acct #	1003
WO #	1056
Type	Work Order
Skill	
Priority	Medium
Territory	
Request	
Status	Scheduled
Start	12:00 AM
End	12:00 AM
Duration	01:00
Dispatch	None
Travel Start	
Work Start	
Work End	
Site #	Main
Site Name	Balak, Mike
Site Contact	Mike Balak
Site Phone	(415)555-6636
Address 1	8753 S. Mountain Vi...
Address 2	
City	Bayshore
State	CA
Postal	94326

Tracking Dispatch Statuses (Resource Whereabouts):

ServiceLedger provides you with the option of tracking your resources and what jobs they have done and what jobs are remaining by using **Dispatch Statuses**. When used correctly, **Dispatch Statuses** allow you to track the status of all dispatches and track information like **Traveling, Job Start, Job End, No Show** and more.

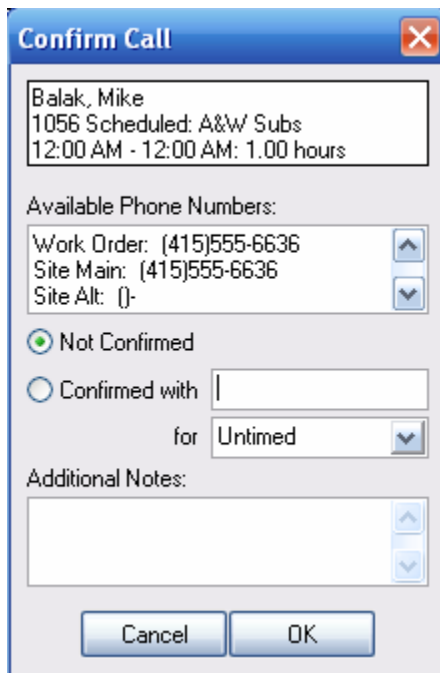
It is recommended that you color-code your **Dispatch Statuses**. This is done under **Preferences** from the Dispatch Board and clicking on the **Dispatch Status** tab. *Note: Further instructions can be found in Getting Started With Scheduling.*

On any work order, you have the ability to right-click and select **Dispatch Actions** and choose between different options for dispatch statuses.



Confirm Call:

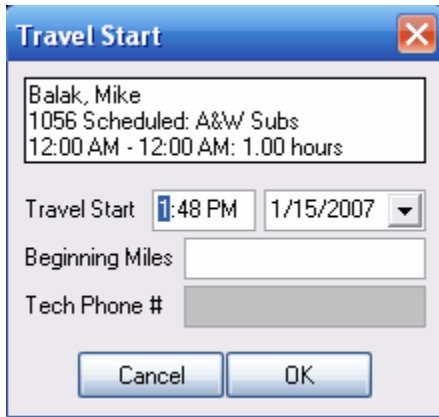
This feature is useful if you need to confirm a job before you dispatch. In addition to the job and telephone information, you have the ability to select who you confirmed the call with and what time window you scheduled the appointment for. The time window is defined in your scheduling preferences. You can also add additional notes for the technician and click **OK** to confirm the call.



Enter Travel Start Time:

This is a useful feature if you want to 1) track the whereabouts of your resources at any given time and 2) update the work order information with the time spent on traveling and on the job. When you select this option, you will be able to enter

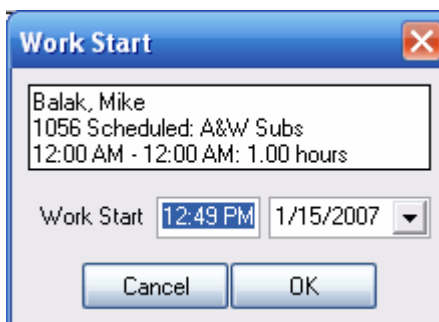
the travel start time (defaulting to the current time) and mileage, if you require the additional information.



1. Enter the **Travel Start** time.
2. Enter the **Date**, if different from the current date. This is useful if you need to update a work order after-the-fact and need to update the time information on the job.
3. Enter the **Beginning Miles** on their vehicle.
4. Click the **OK** button to save the entry.

Enter Work Start:

Select the **Enter Work Start** option if you want to record the job start date/time. By default, it will provide you with the current date and time.



1. Enter the **Work Start** time.
2. Enter the **Date**, if different from the current date. This is useful if you need to update a work order after-the-fact and need to update the time information on the job.
3. Click the **OK** button.

Enter Work End:

Select the **Enter Work End** option if you want to record the job end date/time. By default, it will provide you with the current date and time.

Work End

Bolinski, Rafal
 1093 Scheduled: Preston
 12:00 AM - 12:00 AM: 1.00 hours

Work End: 12:51 PM 1/15/2007

End Miles:

Rate #:

Price: \$0.00 Cost: \$0.00

Work Performed:

Change Status: Completed

Reschedule for: Preston

1/16/2007 Untimed ()

Reschedule with the Service Calendar

Cancel OK

1. Enter the **Work End** time.
2. Enter the **Date**, if different from the current date. This is useful if you need to update a work order after-the-fact and need to update the time information on the job.
3. Enter the **Ending Miles** of the vehicle.
4. Enter the **Resource Rate** that will be billed for the job duration, if you bill for time.
5. The **Price** will default to the **Resource Rate**, or you can overwrite it.
6. The **Cost** will default to the **Resource Cost**, or you can overwrite it for job costing purposes.
7. Enter the **Work Performed**.
8. If you want to change the status, click on the **Change Status** checkbox and select the status to change to from the drop-down box.
9. If the job needs to be rescheduled, click the **Reschedule For** checkbox and select the resource, date and time for the reschedule.
10. If you prefer to reschedule in the calendar, click on the **Reschedule with the Service Calendar** checkbox and it will allow you to reschedule using the calendar.

Open Tech Work Entry:

When you enter **Travel Start**, **Job Start** and **Job End Times** on the Dispatch Board, you are creating a **Time Entry** on the work order. This is a time saving step with multiple benefits like tracking the whereabouts of your resources and creating the time entry instead of having to do it manually later.

You can open the Tech Entry for the work order by selecting the **Open Tech Work Entry** option to make any necessary adjustments.

Tech Work Entry

Technician: Preston
Date: 1/15/2007

Travel Start: 12:51 PM
Job Start: 12:51 PM
End: 12:51 PM

Travel Duration: 00:00
Work Duration: 00:00

Work Duration does not match start/end times.
Adjust the start/end time to reset the duration.

Rate #: [dropdown]
Rate: \$0.00
Cost: \$0.00
Charges: \$0.00

Beginning Miles: [text]
Ending Miles: [text]
Total Miles: [text]
Rate: \$0.36
Charges: \$0.00

Use Minimum Bill To Agreement Bill To Prepaid Labor

Description Equipment Invoice Charges Misc.

Cancel OK

Changing Dispatch Statuses Without Creating Tech or Time Entries:

You can still use ServiceLedger to track your resources without creating time entries. This option is useful if you still want to track your resources, but do not require recording travel start, job start and job end times. This option will allow you to update the Dispatch Board with the necessary status, however no time entry will be created on the work order.

1117 Medium	Untimed: 1.00 Hours
Bank of America	1106 Medium
Untimed: 1.00 Hours	

Open Work Order	
Complete Work Order	
Print Work Order	
Actions for this Technician ▶	
Dispatch Actions ▶	Confirm Call
Route & Job Order ▶	Send to Technician ▶
Change Schedule Duration	Enter Travel Start
Move to New Date	Enter Work Start
Copy to New Dates	Enter Work End
Grab Schedule	Open Tech Work Entry
Drop Schedule	Change Dispatch Status ▶
Cut Schedule	
Copy Schedule	
Paste Schedule	
Delete Schedule	
Add Work Order	

None
Not Confirmed
Confirmed
Dispatched
Traveling
No Show
On Site
Off Site
Finished