

ServiceLedger 2009

Getting Started Guides



Getting Started with the Resource Manager

This guide will document how to use the ServiceLedger Resource Manager including managing technicians, sub-contractors, and equipment.

Introduction:

Resources are the technicians, sub-contractors, and equipment you will assign or schedule to your jobs. Before you start to use ServiceLedger, you must create at least one resource for you to assign or schedule jobs to. The Dispatch Board and Service Calendars will prevent you from using them until at least one resource is created.

Creating Resources:

While ServiceLedger offers two distinct lists of resources for technicians and sub-contractors, each list is exactly the same except the categorization. For purposes of this guide, we will only show technicians, however it is the same for sub-contractors.

To create a resource, click on **Resources | Technicians** from the **Navigator** to open the **Technician List**. The Technician List will provide a listing of all current technicians you have created.

Click the  **Add New Record** button to add a new resource.

Resource

Details

Tech ID: CHARLES

Name: Charles Millsap

Status: Active

Type: Employee

Show in Dispatch & Schedule:

Defaults

Default Labor Item: Default Labor

Default Labor Rate: \$125.00

Default Labor Cost: \$25.00

Default Comm Rate: 0.0%

Ranking: 1

Notes | **Address** | Time Off | Territory | Skill | Rates | Details | Commission | Custom Fields

Address 1:

Address 2:

City:

State/Prov:

Postal:

Email:

Web Password:

ActiveSync Dir.:

Home:

Phone:

Alt. Phone:

Fax:

Cell:

Pager:

Notify By:

Associated User: CHARLES

1. Enter a unique **Tech ID** – this will be the unique identifier for this technician. The Tech ID is how the technician will be identified throughout the system including when assigning or scheduling a job to the technician.
2. Enter a **Name** for the technician.
3. The **Status** will default to **Active**. Only active technicians will be available to assign or schedule jobs to.
4. **Type** will be either **Employee** for technicians or **Sub-Contractor** for your sub-contractors or **Equipment** for your equipment resources.. If you create the resource from the **Technician List**, it will only allow you to enter **Employee**. If you create the resource from the **Sub-Contractor List**, it will only allow you to enter **Sub-Contractor**.
5. The **Default Labor Item** is the default item you want to use to invoice for time for this resource.
6. **Default Labor Rate** is the default rate for the resource for billing purposes.
7. **Default Labor Cost** is the default cost for the resource for costing purposes.
8. **Default Commission Rate** is the default commission for the resource for commission purposes.

9. The **Ranking** field is where you want to rank the resource on the Dispatch Board or Service Calendar. **1** is the highest ranking and will always display first (unless you have multiple resources with a ranking of 1) on the Dispatch Board or Service Calendar.
10. The **Show in Schedule** checkbox gives you the control to either display the resource on the Dispatch Board or Service Calendar, or remove them from view. It is most often used for sub-contractors that you may not want to list on your Dispatch Board or Service Calendar.
11. Click the **Save** button to save the record.

Entering Address Information:

You can enter the address information of your resource by clicking on the **Address** tab from the resource record. With the exception of **Web Password**, **ActiveSynch Dir**, **Notify By** and **Associated User**, all of the fields are self-explanatory. Definitions of each of those fields are below.

| Notes | Address | Time Off | Territory | Skill | Rates | Details | Commission | Custom Fields |
|-----------------|---------|----------|-----------|-----------------|-------|---------|------------|---------------|
| Address 1 | | | | Home | | | | |
| Address 2 | | | | Phone | | | | |
| City | | | | Alt. Phone | | | | |
| State/Prov | | | | Fax | | | | |
| Postal | | | | Cell | | | | |
| Email | | | | Pager | | | | |
| Web Password | | | | Notify By | | | | |
| ActiveSync Dir. | | | | Associated User | | CHARLES | | |

1. **Web Password** is used for the **Tech Web Portal** and is where the password for the tech is stored.
2. **ActiveSynch Dir** is for the PDA version and informs ServiceLedger where to find the ActiveSynch Directory for the resource.
3. **Notify By** is the preference of how the resource likes to be communicated with and is most often used for sub-contractors.
4. **Associated User** is for users who are resources and links the user record in ServiceLedger with the resource record.

Scheduling Time Off:

You can schedule time off for your resources by clicking on the **Time Off** tab. Time off is useful if you want to block any jobs from being scheduled or assigned to a resource during a particular time.

Click the **Add** button to add a new time off for a resource.

| Description | Start Date Time | End Date Time |
|-------------|-----------------|---------------|
| | | |

1. Enter a **Description** for the time off activity.
2. Enter a **Start Date Time** for when you want to start the time off.
3. Enter an **End Date Time** for when you want to end the time off. *Note: Pay attention to the time on the end date. If you want to have a resource off for an entire day, select the End Date for the following day and set the time to midnight.*

Assigning Territories:

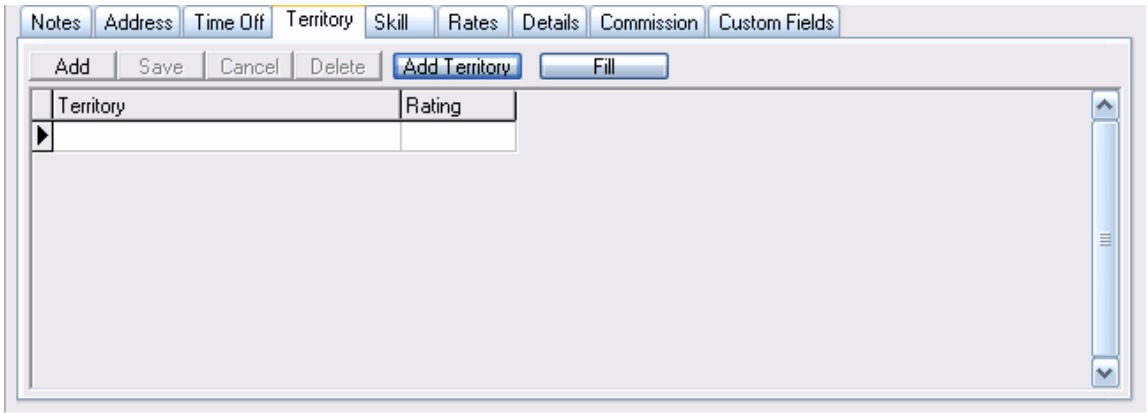
Territories will help you maximize scheduling efficiency by limiting your resources to a specific geographic region. In most cases, your resources may work all territories. For sub-contractors you may want to limit them to a specific territory.

Note: You must have territories defined before you can use this feature.

Click the **Add** button to assign a specific territory for a resource. A resource can have one or multiple territory assignments.

Click on the **Fill** button to fill in all territories for the resource.

Click on the **Add Territory** button to add a new territory to ServiceLedger.



1. Select the **Territory** from the drop-down box.
2. Enter a **Rating** for the resource on the territory. This is similar to the **Ranking** field and allows you to rank your resources to a specific territory.

Assigning Skills:

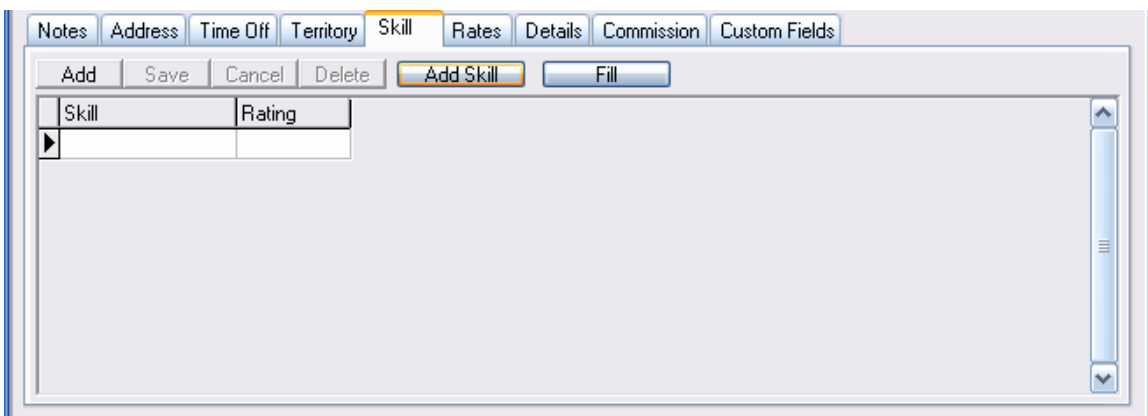
Skills allow you to track the skills, certifications, trades, licenses or other skill of your resources. It is most useful when you have multiple resources with different skills and you need to differentiate between resources when assigning or scheduling jobs to ensure you assign or schedule a job to the appropriate resource.

Note: You must have Skills setup to use this feature.

Click the **Add** button to assign a specific skill for a resource. A resource can have one or multiple skill assignments.

Click on the **Fill** button to fill in all skills for the resource.

Click on the **Add Skill** button to add a new skill to ServiceLedger.



1. Select the **Skill** from the drop-down box.

2. Enter a **Rating** for the skill. You may have multiple resources with the same skill, however one is preferred over the other. Give the preferred resource a higher ranking if you want the resource to take priority over jobs requiring that skill.

Adding Labor Rates & Labor Costs:

Labor rates and labor costs can be tracked in ServiceLedger per resource allowing for greater control over your job revenue and costing. Labor rates and costs are associated with a specific resource allowing you to determine what rates you will charge for different labor items per resource and what costs are associated with different labor items per resource.

Note: You must have Labor Items defined in ServiceLedger before you can enter labor rates and labor costs.

Click the **Add** button to add a specific labor item to the resource.

Click on the **Fill** button to fill in all labor items for the resource.

Click on the **Add Item** button to add a new item to ServiceLedger.

| Item Number | Rate | Cost | Description |
|-------------|------|------|-------------|
| | | | |

1. Select the **Item Number** from the drop-down box. Only items defined with an **Item Type=Labor** will display in the drop-down box.
2. Enter the **Rate** or use the default rate provided. The default rate is pulled from the item rate defined when you create the item.
3. Enter the **Cost** or use the default cost provided. The default cost is pulled from the item cost defined when you create the item. *Note: It is recommended that you use an average cost and not actual payroll cost as ServiceLedger will display the cost on various job costing reports in ServiceLedger.*
4. Enter the **Description** of the item or use the default. The default description is pulled from the item description defined when you create the item.