

ServiceLedger 2009

Getting Started Guides



Getting Started with the Scheduling Manager

This guide will document how to use the ServiceLedger Scheduling Manager to schedule jobs, dispatch resources, drag and drop jobs to resources, use Work Order Roll-Over feature and more.

Introduction:

ServiceLedger offers very flexible scheduling options for you to schedule your resources for jobs. If you have read the **Getting Started with the Service Manager** guide, you may already know some of the basic scheduling options available to you. The purpose of this guide is to explain some of the more advanced options from a scheduling perspective available to you.

With any of the scheduling options available to you, you have the ability to drag and drop schedules from one technician to another, cut and paste schedules from one day to another, or copy and paste to add another resource to the job.

Note: A common question of ServiceLedger is if you can schedule multiple resources on the same day or different day for the same job. The answer is yes and you have the flexibility to schedule for the same technician on multiple days, or multiple technicians on the same or multiple days.

The Four Scheduling Options:

ServiceLedger offers four distinct service schedulers to schedule your jobs. The following information is provided to give you an understanding of each option so you can decide for yourself what option is best for you. It is recommended that you default the scheduler via **Scheduling Preferences** under the **Scheduling** tab for the scheduler that is most suitable to your needs (see **Scheduling Preferences** for more information.)

The Dispatch Board:

Scheduling a job to the **Dispatch Board** is ideal for companies that need to schedule a job for a specific day and for a specific technician, however you do not require to schedule the job to a specific time. You also have the ability to schedule jobs to **Unassigned** meaning no technician has been specified for the job at the current time. The **Dispatch Board** is where you will also handle the dispatching function of your organization and track the status and whereabouts of your resources on any given day.

Service Schedule

Close Refresh View Type: Print... Preferences

Monday, January 8, 2007 Previous 1/8/2007 Next

Unassigned W/Ds: 7 Hours: 5.00	A&W Subs W/Ds: 1 Hours: 9.50	Eric W/Ds: 1 Hours: 4.00	John W/Ds: 2 Hours: 5.00	Preston W/Ds: 1 Hours: 0.00	Scott W/Ds: 2 Hours: 10.00	Todd W/Ds: 0 Hours: 0
Abercrombie, Kristy 1215 Scheduled Untimed: 1.00 Hours	Bank of America 1007 Scheduled Untimed: 9.50 Hours	Bristol, Sonya 1214 Closed Untimed: 4.00 Hours	Bank of America 1021 Scheduled Untimed: 5.00 Hours	Dunn, Eric C.W. 1023 No Show Untimed: 0.00 Hours	Countrywide 1105 Traveling Untimed: 8.00 Hours	
Barley, Renee 1216 Scheduled Untimed: 1.00 Hours			Balak, Mike 1107 Scheduled Untimed: 0.00 Hours		Bristol, Sonya 1214 Closed Untimed: 2.00 Hours	
Bristol, Sonya 1217 Scheduled Untimed: 1.00 Hours						
Baker, Chris 1218 Scheduled Untimed: 1.00 Hours						
Balak, Mike 1224 Scheduled Untimed: 1.00 Hours						
Walker, Rich 1196 Scheduled Untimed: 0.00 Hours						
Baker, Chris 1201 Scheduled Untimed: 0.00 Hours						

The Slot Scheduler:

The **Slot Scheduler** is where you can define time slots or time windows you schedule in. For example, if you give your customers a window of two or four hours, etc., you can drop a job into the slot and ServiceLedger will track the capacity of the slot for each technician to ensure you do not over schedule any slot. You also have the ability to select **Untimed** and **Unassigned** if you don't know when or who will do the job. The **Slot Scheduler** is most often used by residential service companies that schedule using time windows.

	Untimed	Morning 7:00 AM - 12:00 PM	Afternoon 12:00 PM - 5:00 PM	Evening 5:00 PM - 10:00 PM
Unassigned 0 jobs / 0 hours				
A&W Subs 0 jobs / 0 hours				
Eric 0 jobs / 0 hours				
John 0 jobs / 0 hours				
Preston 0 jobs / 0 hours				
Scott 0 jobs / 0 hours				
Todd 0 jobs / 0 hours				
William 0 jobs / 0 hours				
Charles 0 jobs / 0 hours				

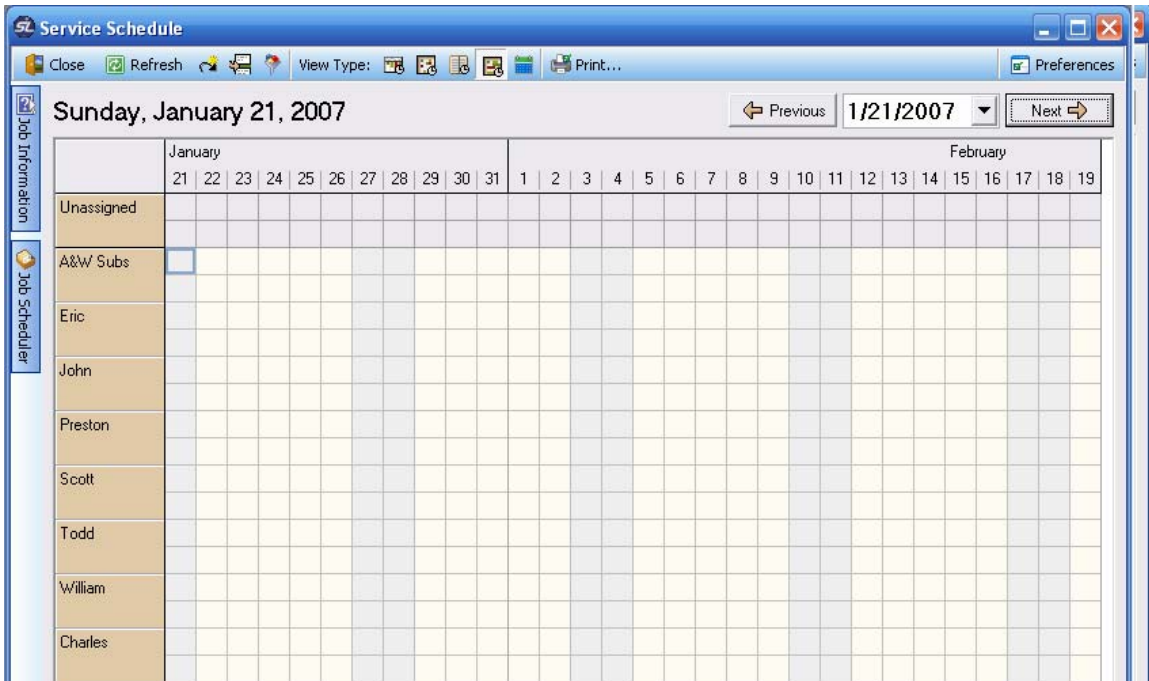
The Time Scheduler:

The **Time Scheduler** allows you to schedule jobs to a specific time. You also have the ability to select **Untimed** and **Unassigned** if you don't know when or who will do the job. For example, if you have a two hour job and you tell a customer you will be at a location at 8 AM, you can use the **Time Scheduler** to note that the job has a specific time associated with it.

	Untimed	7:00 AM	8:00 AM	9:00 AM	10:00 AM	11:00 AM	12:00 PM	1:00 PM	2:00 PM	3:00 PM	4:00 PM	5:00 PM
Unassigned												
A&W Subs												
Eric												
John												
Preston												
Scott												
Todd												
William												
Charles												

The Day (or Chart) Scheduler:

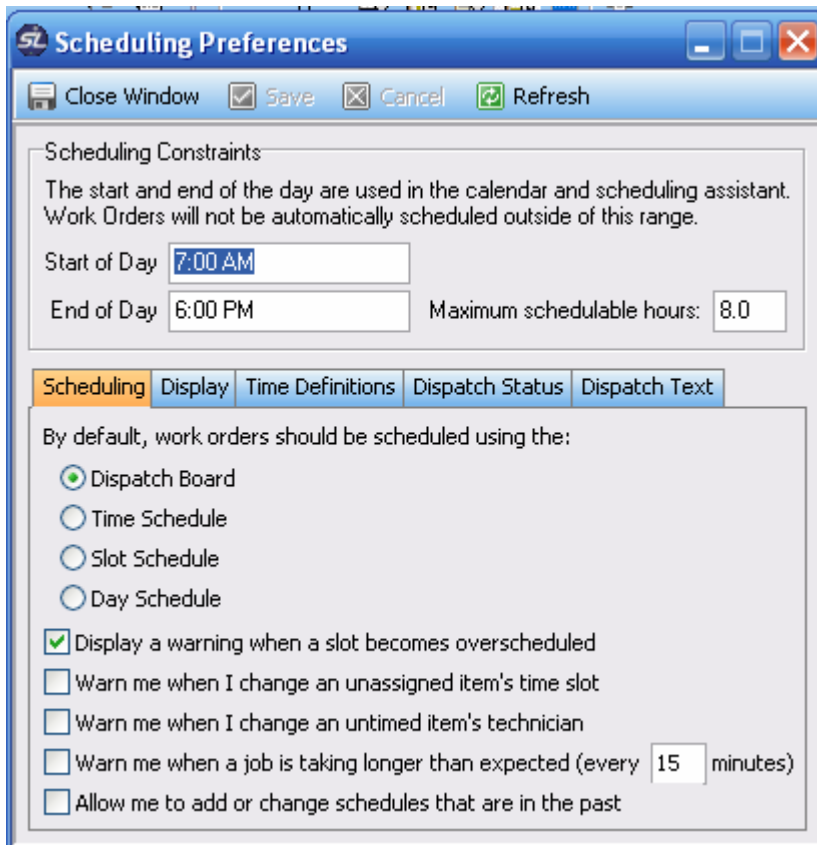
The **Day Scheduler** allows you to schedule a job across multiple days and is useful if you have a job that will take more than one day to complete. For example, you have a job that will take a week to complete and you want to schedule the job over a one week period.



Setting Up Your Scheduling Preferences:

Before you start to use the service scheduling or dispatching functions of ServiceLedger, it is required that you setup your **Scheduling Preferences**. In addition to the preferences, you must have **Resources** defined in ServiceLedger.

Click on the **Dispatch Board** option from the **Navigator** and click on **Preferences** in the upper right hand corner to open the **Scheduling Preferences** window.



1. Enter your default **Start of Day**. Be sure to add the AM or PM at the end after you enter the time.
2. Enter your default **End of Day**. Be sure to add the AM or PM at the end after you enter the time.
3. Enter the **Maximum Schedulable Hours** for any technician on any day. This is useful if you want ServiceLedger to flag you when you are over scheduling any technician.
4. Under the **Scheduling** tab, click the default scheduler to use when you launch the scheduler from a job by clicking on the appropriate scheduler.
*Note: When you schedule a job from a work order, this is the scheduler that will pop up by default avoiding the need to switch between schedulers after the **Service Calendar** is opened.*

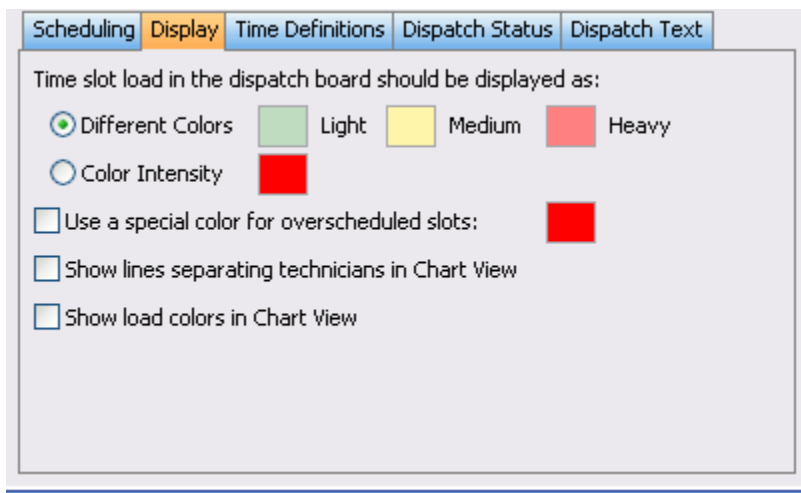
Additional Options:

1. If you check **Display a warning when a slot becomes overscheduled** it will flag ServiceLedger to warn you when you over schedule any slot.
2. If you check **Warn me when I change an unassigned item's time slot** it will warn you if you try to drag a job from unassigned to a technician into a time slot different than what you promised the customer.
3. If you check **Warn me when I change an untimed item's technician** will warn you if you try to change the assigned technician for a work order.

4. If you check **Warn me when a job is taking longer than expected** (**every x minutes** it will flag ServiceLedger to open a reminder that the job is running late. The notification will occur every **x** minutes depending upon the number of minutes you enter.
5. If you check **Allow me to add or change schedules that are in the past** ServiceLedger will allow you to create schedules in the past or modify schedules from the past. This is useful if you want all jobs to be recorded on the calendar and may need to go back into the past to create and schedule the job.

The Display Tab:

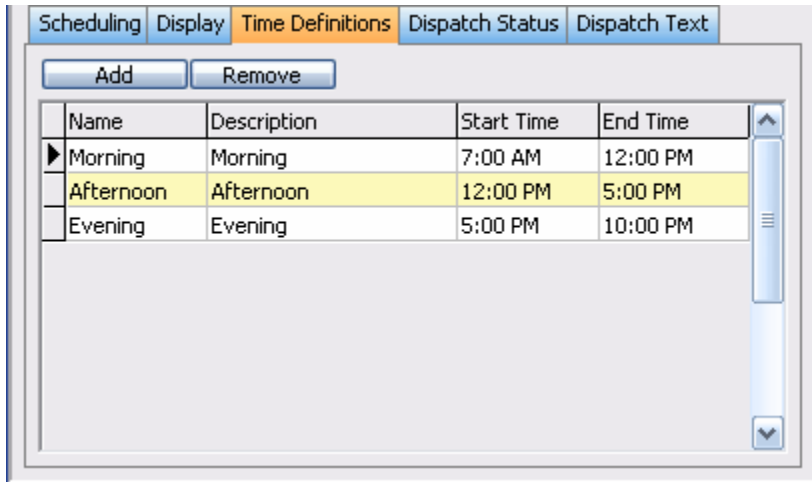
The **Display** tab is where you can define the color-codes for the Slot Scheduler to warn you when a slot is close to or is over scheduled.



The screenshot shows a software interface with five tabs: Scheduling, Display, Time Definitions, Dispatch Status, and Dispatch Text. The 'Display' tab is selected and highlighted in orange. Below the tabs, the text reads: 'Time slot load in the dispatch board should be displayed as:'. There are two radio button options: 'Different Colors' (selected) and 'Color Intensity'. Under 'Different Colors', there are three color swatches: a light green swatch labeled 'Light', a yellow swatch labeled 'Medium', and a red swatch labeled 'Heavy'. Under 'Color Intensity', there is a red swatch. Below these options are four checkboxes: 'Use a special color for overscheduled slots:' (with a red swatch), 'Show lines separating technicians in Chart View', and 'Show load colors in Chart View'.

Creating Time Definitions:

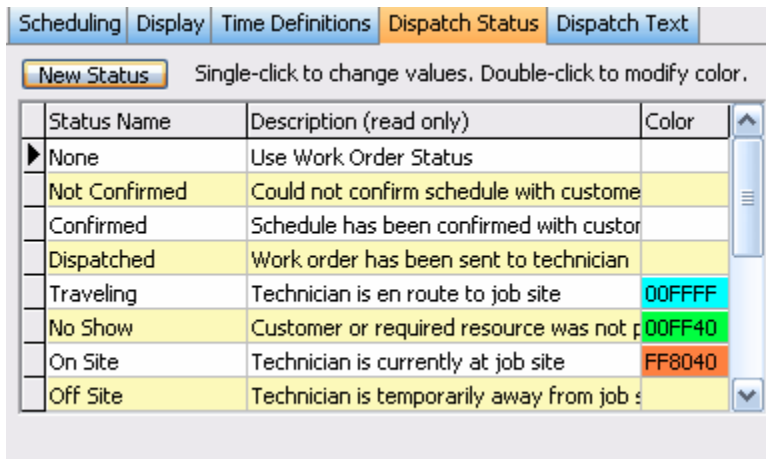
If you are going to use the slot scheduler to schedule via time windows, you can create your own time slots under the **Time Definitions** tab.



1. Click the **Add** button to add a new time definition.
2. Enter a **Name** and **Description** for the time definition.
3. Enter the **Start Time** for the time window.
4. Enter the **End Time** for the time window.

Dispatch Statuses & Color-Codes:

Dispatch Statuses allow you to track the status on each job on the **Dispatch Board**. A **Dispatch Status** can be used to track if a technician is traveling to a job site, on a job site, leaving a job site, etc. Additionally, you can associate a color to each dispatch status that will update the color of the job on the **Dispatch Board** for each visual reference of the current status of the job.



1. Click on the **New Status** button to add a new dispatch status.
2. Enter a **Status Name** and **Description**.
3. Double-click on the **Color** to add a color for the dispatch status.

Dispatch Text:

Dispatch Text allows you to define what information you want to see on the job from the **Dispatch Board**. Since space is limited in each cell, you can define the most important information you want to view in each job cell. The **Dispatch Text** is summary information, however if you use the Job Information feature you are able to get more detailed job information.

Dispatch Text is the text in each job cell as follows:

Barley, Renee 1022 Scheduled Untimed: 5.00 Hours
--

To change the **Dispatch Text** click on the **Dispatch Text** tab from **Preferences**.

Scheduling	Display	Time Definitions	Dispatch Status	Dispatch Text
[AcctName] [WONumber] [WOSstatus] [ScheduleTimeDuration]		[AcctNumber] [AcctName] [WONumber] [WOType] [WOSstatus] [WOSkill] [WOPriority] [WOTerritory]		
Please type whatever you want to appear on the dispatch board into the text area above.		[SiteNumber] [SiteName] [SiteAddress1] [SiteAddress2] [SiteCity] [SiteState] [SitePostal] [BillAddress1] [BillAddress2] [BillCity] [BillState] [BillPostal]		
<input type="button" value="Reset to Default"/>				

- Using the **Dispatch Text** cell, enter the option you want to add on each of the three lines available. For example, you want to show **Account Number** instead of **Account Name** and **Work Order Priority** instead of **Work Order Status**. When you are finished it should look like below.

[AcctNumber] [WONumber] [WOPriority] [ScheduleTimeDuration]

If for any reason the **Dispatch Text** is not working properly, be sure to check that the [or] bar is entered and the spelling of each field is correct. If any problems continue, click the **Reset to Default** button to reset the **Dispatch Text**.

Understanding the Scheduling Mode:

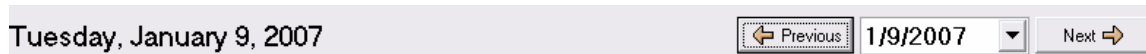
Scheduling Mode refers to the state that ServiceLedger is in when you are on the Dispatch Board or Service Calendars. If you are in the process of scheduling a job from a work order and open the Dispatch Board or Service Calendar, you will be in scheduling mode until you schedule the job by dropping it on a cell for

the technician, day and time you want to schedule it for. If you have a job attached to your mouse pointer as you are moving around, then you are in scheduling mode. When you are in scheduling mode, you must first complete the scheduling of the job before you close the Dispatch Board or Service Calendar or no schedule will be created.

You can also be in scheduling mode if you drag a job, copy a job or cut a job as ServiceLedger is going to need you to drop or paste the job before you are no longer in scheduling mode. If you close the Dispatch Board or Service Calendar prior to dropping or pasting the job, no schedule will be created.

Navigating To Different Days:

When you are on the **Dispatch Board** or any of the other schedulers, you can navigate between different days by using the **Date Selection** date drop-down box or the **Previous** or **Next** button. The **Date Selection** allows you to select a specific date and the **Previous** and **Next** button will scroll to the previous day or next day. The current day you are viewing is always captioned on the upper left hand corner of the scheduler.



Scheduling Jobs:

There are many ways you can schedule jobs in ServiceLedger. Most jobs are scheduled directly from the work order by clicking on the **Schedule Tech** button. This method allows you to schedule immediately after you create the work order in ServiceLedger. You can schedule one or multiple technicians to any job. You may also elect to use the **Scheduling Assistant** from work orders to schedule your jobs.

You can also use the **Job Scheduler** from the Dispatch Board to view existing work orders that need to be scheduled, or may need to be rescheduled. Similar to the **Job Scheduler**, ServiceLedger offers a **Job/Work Order Roll-Over** feature that allows you to roll over uncompleted jobs from one day to the next.

The **Equipment PM Scheduler** and **Task Scheduler** can automatically schedule jobs for you if you have **Auto-Schedule** turned on.

Scheduling Jobs from Work Orders:

From the work order you wish to schedule, click on the **Schedule Tech** button to schedule the job.

Assigned To: Eric Schedule Tech

Start/End: 1/9/2007 1/9/2007

Duration: 1.0 Skill: [dropdown]

This will open the Dispatch Board or Service Calendar based upon your preference and allows you to schedule the job. Note that you are in scheduling mode when you schedule the job and the job will not be scheduled until you drop the job onto the schedule by left-clicking to drop the job onto the schedule.

Preston WOs: 2 Hours: 5.00	Scott WOs: 1 Hours: 1.00	W...
1002 1225 High Untimed: 5.00 Hours	1008 1227 Medium Untimed: 1.00 Hours	
1003 1229 Medium Untimed: 0.00 Hours		
	1003 1229 Medium Untimed: 10.00 Hours	

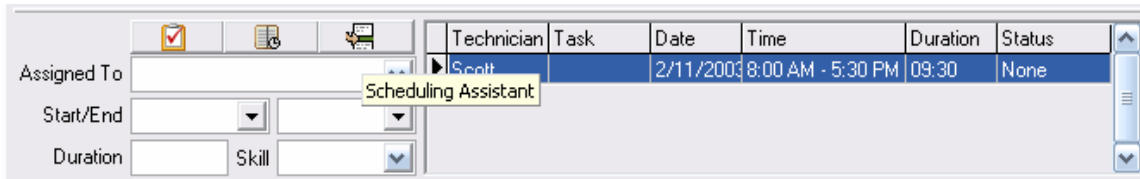
You can confirm the schedule or click **No** if you want to keep the scheduler open.

Scheduling Jobs from Scheduling Assistant:

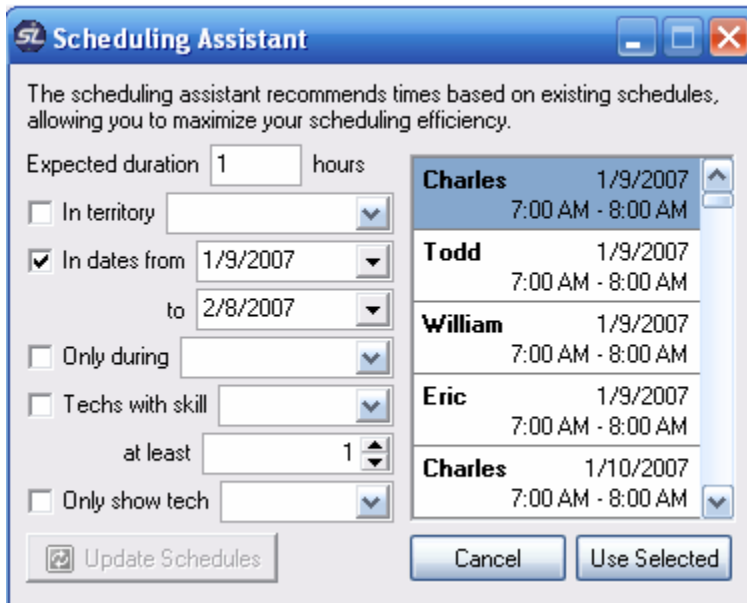
The **Scheduling Assistant** is a useful feature if you want to have your users allow ServiceLedger to recommend schedule options instead of having users use the scheduling calendars to schedule the jobs. This non-visual approach to scheduling allows ServiceLedger to look at your existing schedules and determine options based upon the preferences you define. It is useful for organizations that does heavy scheduling and need to maintain optimal scheduling efficiency or fill in the gap on existing schedules for technicians.

The **Scheduling Assistant** can only be used while you are in **Scheduling Mode** meaning you have an “active” job available to schedule. It is recommended that you click on the **Scheduling Assistant** from the job or work order you are trying to schedule. You will not be able to open the **Scheduling Assistant** from the **Dispatch Board** unless you are in **Scheduling Mode**.

On an existing work order or job, click on the **Scheduling Assistant** button in the lower left-hand corner of the work order.



This will open the **Scheduling Assistant** and allow you to enter additional information before ServiceLedger provides you with scheduling options.



1. The **Expected Duration** will default to the **Job Duration** field you enter manually or may be updated automatically from the **Task Manager** on the work order.
2. If you want to filter by territory, click the **In Territory** checkbox and select the territory from the drop-down box you want to filter on. This option will only show you options for technicians who are already scheduled in the specified territory.
3. If you want to filter by date range, click on the **In Dates** checkbox and select a starting and ending date. This option will limit the date range options and provide options during the date range specified.
4. If you want to filter by a specific time range, click on the **Only During** checkbox and select the time range you want to schedule for. This option will only show you options based upon the availability of the time range.
5. If you want to filter by technician skill, click on the **Techs with Skill** checkbox and select the skill required for the job. This option will only show you technician options based upon what technicians have the skill required for the job. Additionally, you can select a **Skill Rating** that will filter out any technicians that do not meet that specific rating required for the job.

6. If you want to filter by a specific technician, click on the **Only Show Tech** checkbox and it will only show options available for that specific technician.
7. When you have entered your filter criteria, click the **Update Schedule** button to let ServiceLedger process scheduling options for you.

Selecting a Scheduling Option:

Once ServiceLedger has processed the scheduling options for you, you can review the options and determine what option is best for the job. Click on the option so that it is highlighted in blue and then click on the **Use Selected** button to schedule the job.

Charles	1/9/2007	7:00 AM - 8:00 AM
Todd	1/9/2007	7:00 AM - 8:00 AM
William	1/9/2007	7:00 AM - 8:00 AM
Eric	1/9/2007	7:00 AM - 8:00 AM
Charles	1/10/2007	7:00 AM - 8:00 AM

Cancel Use Selected

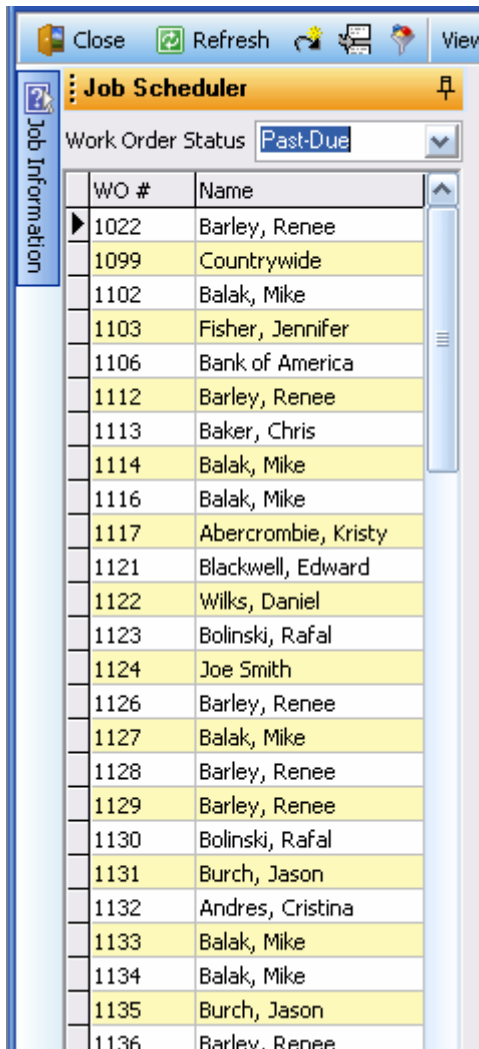
Scheduling Jobs from the Job Scheduler:

The **Job Scheduler Panel** allows you to schedule jobs directly from the Dispatch Board. This is useful for companies that create work orders and schedules the work orders at a later time.

From the Dispatch Board, open the **Job Scheduler Panel** by clicking on the Job Scheduler to the left of the Dispatch Board.

You can have the panel stick by clicking on the  Thumbtack.


To unstick the panel, click on the  Thumbtack again. It will collapse to the left after a couple seconds of delay.

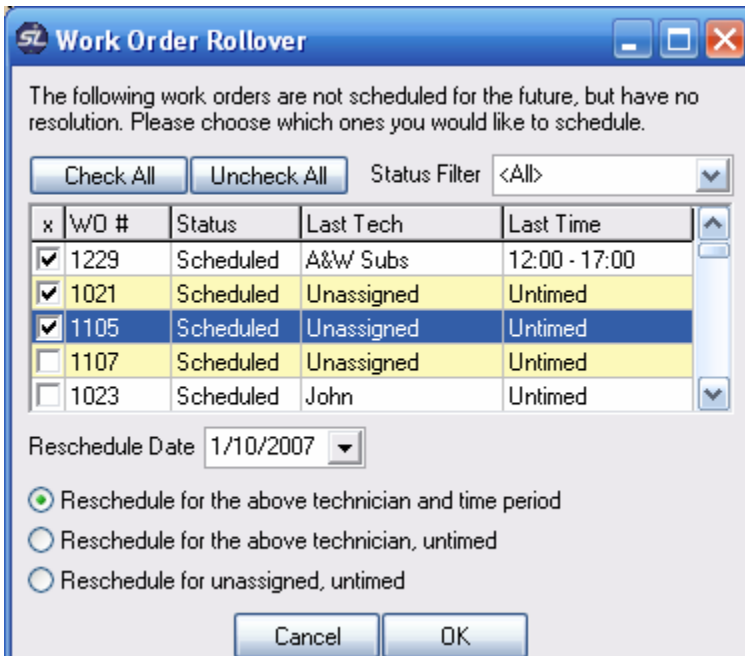


1. You can filter the jobs by **Work Order Status**. For example, if you only want to see new jobs, select **New** as the status or if you only want to see past-due jobs, select **Past-Due** as the status.
2. The list will refresh based upon the status you select.
3. Select the job you want to schedule, left-click and hold the job to put ServiceLedger in scheduling mode and drag the job to the cell you want to drop in and unclick to drop the job to schedule it. You must schedule the job by un-clicking it or no schedule will be created.
4. As you drag jobs off the **Job Scheduler**, the job will disappear from the **Job Scheduler** list since it has been moved and scheduled.

Rolling Over Jobs from Work Order Roll-Over:

The **Work Order Roll Over** feature allows you to roll over jobs from one day to the current day or a day in the future. This feature is useful if you have a lot of uncompleted jobs on one day and need to roll the jobs over to another day in one step instead of having to go to each job and cutting and pasting to a new day.

Click on the  **Work Order Roll-Over** button to launch the **Work Order Roll Over** window.



x	WO #	Status	Last Tech	Last Time
<input checked="" type="checkbox"/>	1229	Scheduled	A&W Subs	12:00 - 17:00
<input checked="" type="checkbox"/>	1021	Scheduled	Unassigned	Untimed
<input checked="" type="checkbox"/>	1105	Scheduled	Unassigned	Untimed
<input type="checkbox"/>	1107	Scheduled	Unassigned	Untimed
<input type="checkbox"/>	1023	Scheduled	John	Untimed

1. The **Status Filter** allows you to filter to just the jobs you want to rollover based upon the status of the job. For example, if you only want to see past-due jobs, you can select **Past-Due**.
2. You can click the **Check All** button to check all jobs that need to rollover.
3. You can individually check jobs by clicking on the **X** checkbox to check the job to rollover.
4. You can enter a **Reschedule Date** for the current day or a future day.
5. You can select the option you prefer to rollover the job.
 - a. **Reschedule for the above technician and time period** will reschedule the job for the same technician and time originally scheduled on the new scheduled day.
 - b. **Reschedule for the above technician, untimed** will reschedule the job for the same technician in the untimed category.
 - c. **Reschedule for unassigned, untimed** will reschedule the job for the new day and leave the technician unassigned and the time will be untimed.
6. Click **OK** to reschedule the jobs.

Using Auto-Schedule:

The **Auto-Schedule** feature is a custom option you can setup if you wish to have ServiceLedger automatically schedule new jobs onto the dispatch board. It is useful for companies that do preventative maintenance schedules, or have a job

importer that is importing jobs for you, or if you allow customers to create jobs via the Customer Portal. The purpose of the auto-schedule feature is to automatically take new jobs created in ServiceLedger and schedule them based upon the scheduling preferences you define on the work order.

When using the Auto-Schedule feature, it is important to note that ServiceLedger will automatically schedule jobs based upon the Assigned To and Job Start date you define when you create the work order. If no technician is assigned, or no job start date is defined, then it will create a schedule for the current day and leave the schedule unassigned and untimed.

To activate this feature, follow these instructions:

1. **Administration | Administration** and open the **Administration Window**.
2. Click on **ALT** and **F8** simultaneously to open the **Global Preferences** tab.
3. Click the **Add** button on the **Global Preferences** tab to add a new option.
4. Enter **work_order.auto_schedule** and set the value to **1**.
5. Be sure to click in another row to ensure that the option is saved then close the window.

Scheduling Jobs from the Equipment PM Scheduler:

The **Equipment PM Scheduler** will allow you to schedule preventative maintenance work orders for equipment due for service based upon the frequency of service you define for the equipment. The **Equipment PM Scheduler** can automatically create schedules for jobs created for preventative maintenance if you have **Auto-Schedule** turned on. For more information on the **Equipment PM Scheduler** see **Getting Started with the Equipment Manager**.

Scheduling Jobs from the Task Scheduler:

The **Task Scheduler** will allow you to schedule recurring tasks based upon the frequency of service you define on the recurring task. The **Task Scheduler** can automatically create schedules for jobs created for recurring tasks if you have **Auto-Schedule** turned on. For more information on the **Task Scheduler** see **Getting Started with the Task Manager**.

Adding New Jobs from the Dispatch Board:

Some companies prefer to view their schedules first before creating new work orders. This is useful if you have a customer on the phone and they need to know if you can do a job first before they will schedule it. ServiceLedger refers to this as **Reverse Scheduling** since you are scheduling the job before you create the work order.

To add a new job, find the day, time and technician (based upon your scheduling preference) and right-click on the cell to add the new job.

Click **Add Work Order Here** to add the work order. This will open the work order and allow you to create the work order, however the work order will already be scheduled for the technician on the date and time you specified on the scheduler.

John WOs: 2 Hours: 7.00	Preston WOs: 2 Hours: 5.00	Scott WOs: 2 Hours: 11.00
1002 1225 High Untimed: 5.00 Hours	1002 1225 High Untimed: 5.00 Hours	1008 1227 Medium Untimed: 1.00 Hours
1013 1023 Medium Untimed: 2.00 Hours	1003 1229 Medium Untimed: 0.00 Hours	1003 1229 Medium Untimed: 10.00 Hours

Open Work Order

Complete Work Order

Print Work Order

Actions for this Technician ▶

Dispatch Actions ▶

Route & Job Order ▶

Change Schedule Duration

Move to New Date

Copy to New Dates

Grab Schedule

Drop Schedule

Cut Schedule

Copy Schedule

Paste Schedule

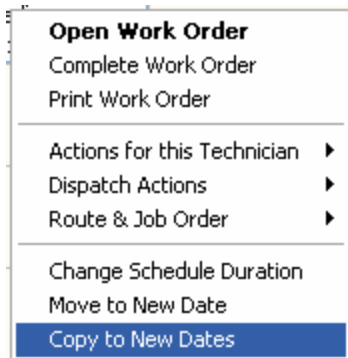
Delete Schedule

Add Work Order Here

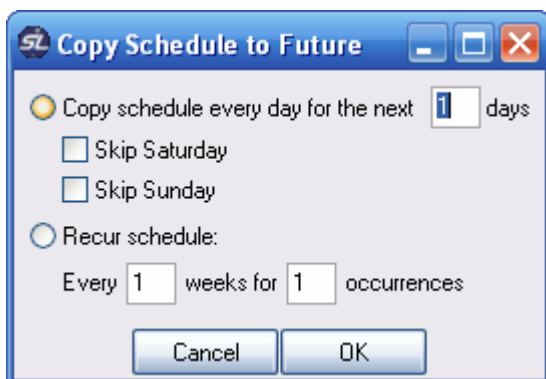
Copying Schedule for Recurring Schedules:

ServiceLedger provides a basic recurring schedule feature on the Dispatch Board that allows you to recur a schedule based upon any frequency you select for a single job. This is useful if you want to create a single work order that may take several days to complete or require multiple visits over several weeks or months. ServiceLedger strongly recommends that you use **Recurring Tasks** for your recurring scheduling needs.

Click any job and right-click and select the **Copy to New Dates** option.



This will open the **Copy Schedule to Future** window.



1. Enter if you want to copy the schedule over the next few days (useful if it is a longer job) or if you want to recur the schedule.
2. For recurring schedules, enter the frequency and number of occurrences ServiceLedge should schedule for.

Dragging & Dropping, Copying & Pasting & Cutting & Pasting Jobs:

ServiceLedge provides the ability to drag and drop schedules, copy and paste schedules and cut and paste schedules. As you drag schedules, copy or cut schedules and paste schedules, all the scheduling information on the job will be updated on the job. This feature allows flexibility in your scheduling to easily shift jobs scheduled to one tech to another using any of the following options:

Dragging & Dropping Schedules:

You can drag any job scheduled to a technician to another technician or unassigned on the same day by left-clicking on your mouse in the cell of the schedule you want to drag and holding the job and dragging it over to another technician and then dropping it into the cell by un-clicking the mouse. The job will be attached to your mouse pointer to allow you to see the job you are dragging from one cell to the other.

Note: When you are dragging a job, it is required that you drop the job onto a cell before you leave the scheduler. If you leave the schedule prior to dropping the job, the job schedule is deleted.

Unassigned WOs: 5 Hours: 28.00	A&W Subs WOs: 1 Hours: 9.50	Eric WOs: 0 Hours: 0.00	John WOs: 2 Hours: 7.00	Preston WOs: 1 Hours: 5.00	Scott WOs: 0 Hours: 0.00
1003 1226 Medium Untimed: 1.00 Hours	1010 1007 Medium Untimed: 9.50 Hours		1002 1225 High Untimed: 5.00 Hours	1002 1225 High Untimed: 5.00 Hours	
1008 1227 Medium Untimed: 1.00 Hours			1013 1023 Medium Untimed: 2.00 Hours		
1010 1021 Medium Untimed: 10.00 Hours					1004 1022 Medium Untimed: 5.00 Hours
R3060255 1105 High Untimed: 16.00 Hours					
1049 1107 Medium Untimed: 0.00 Hours					

Copying & Pasting Schedules:

You can copy any schedule for a technician and paste it to another technician on the same or a different day by right-clicking your mouse on the cell of the schedule you want to copy and selecting the **Copy Schedule** option. When you copy a schedule you are adding resources to the same job, however the original schedule will not change. This feature is useful if you schedule a job and then want to add additional resources to the job by copying the job and pasting for the other resources.

Unassigned WOs: 5 Hours: 28.00	A&W Subs WOs: 1 Hours: 9.50	Eric WOs: 0 Hours: 0.00
1003 1226 Medium Untimed: 1.00 Hours	1010 1007 Medium Untimed:	
1008 1227 Medium Untimed: 1.00 Hours		
1010 1021 Medium Untimed: 10.00 Hours		
R3060255 1105 High Untimed: 16.00 Hours		
1049 1107 Medium Untimed: 0.00 Hours		

Open Work Order

Complete Work Order

Print Work Order

Actions for this Technician ▶

Dispatch Actions ▶

Route & Job Order ▶

Change Schedule Duration

Move to New Date

Copy to New Dates

Grab Schedule

Drop Schedule

Cut Schedule

Copy Schedule

Paste Schedule

Delete Schedule

Add Work Order Here

After you have copied the schedule, you can click on another cell and right-click on your mouse and select the **Paste Schedule** option.

Preston WOs: 1 Hours: 5.00	Scott WOs: 0 Hours: 0.00	Todd WOs: 0 Hours: 0.00
1002 1225 High Untimed: 5.00 Hours		

Open Work Order
 Complete Work Order
 Print Work Order

Actions for this Technician ▶
 Dispatch Actions ▶
 Route & Job Order ▶

Change Schedule Duration
 Move to New Date
 Copy to New Dates

Grab Schedule
 Drop Schedule

Cut Schedule
 Copy Schedule
Paste Schedule
 Delete Schedule

Add Work Order Here

Note: If you copy a schedule, you must paste the schedule to another technician to copy the schedule. If you close the calendar before you paste it, no copies of the schedule will be made.

Cutting & Pasting Schedules:

You can cut any schedule for a technician and paste it to another technician on the same or a different day by right-clicking your mouse on the cell of the schedule you want to cut and selecting the **Cut Schedule** option. When you cut a schedule you are removing the original technician from the job and adding another technician. This feature is useful if you want to cut a job on one day and add it to another day, however dragging and dropping the schedule is recommended if you are doing it for the same day.

Preston WOs: 1 Hours: 5.00	Scott WOs: 1 Hours: 1.00	Todd WOs: 0 Hours: 0
1002 1225 High Untimed: 5.00 Hours	1008 1227 Medium Untimed: 5.00 Hours	

Open Work Order

Complete Work Order

Print Work Order

Actions for this Technician ▶

Dispatch Actions ▶

Route & Job Order ▶

Change Schedule Duration

Move to New Date

Copy to New Dates

Grab Schedule

Drop Schedule

Cut Schedule

Copy Schedule

Paste Schedule

Delete Schedule

Add Work Order Here

After you have cut the schedule, you can click on another cell and right-click on your mouse and select the **Paste Schedule** option.

Preston WOs: 1 Hours: 5.00	Scott WOs: 0 Hours: 0.00	Todd WOs: 0 Hours: 0
1002 1225 High Untimed: 5.00 Hours		

Open Work Order

Complete Work Order

Print Work Order

Actions for this Technician ▶

Dispatch Actions ▶

Route & Job Order ▶

Change Schedule Duration

Move to New Date

Copy to New Dates

Grab Schedule

Drop Schedule

Cut Schedule

Copy Schedule

Paste Schedule

Delete Schedule

Add Work Order Here

Note: If you cut a schedule, you must paste the schedule to another technician or else the job will not be scheduled. Cutting a schedule is like removing the schedule from the job and if you do not paste it before the calendar is closed, it will remove the original schedule from the job.

Tracking Resource Load from the Dispatch Board:

ServiceLedger provides the ability to track the resource load of each technician. You can get a count of how many jobs are scheduled for the technician on a given day and the total expected duration of all jobs combined. This feature is useful in keeping technicians from becoming overscheduled and allows you to manipulate your schedules to balance the workload among all of your technicians.

Unassigned	A&W Subs	Eric	John	Preston	Scott
WOs: 6 Hours: 29.00	WOs: 2 Hours: 14.50	WOs: 3 Hours: 6.00	WOs: 2 Hours: 7.00	WOs: 2 Hours: 5.00	WOs: 2 Hours: 11.00

Changing Scheduled Hours for a Technician:

You can manually change the hours scheduled for a technician on any job by clicking on the job from the Dispatch Board and right-clicking and selecting the **Change Schedule Duration** option.

Unassigned	A&W Subs	Eric	John
WOs: 6 Hours: 29.00	WOs: 2 Hours: 14.50	WOs: 3 Hours: 6.00	WOs: 2 Hours: 7.00
1003 1226 Medium Untimed: 1.00 Hours	1010 1007 Medium Untimed: 9.50 Hours	1003 1229 Medium Untimed: 1.00 Hours	1002 1225 High Untimed: 5.00 Hours
1008 1227 Medium Untimed: 1.00 Hours	1003 1229 Medium 12:00 PM - 5:00 PM: E	1003 1229 Medium Untimed: 0.00 Hours	1013 1023 Medium Untimed: 2.00 Hours
1003 1230 Medium Untimed: 1.00 Hours		1003 1229 M Untim	
1010 1021 Medium Untimed: 10.00 Hours			
R3060255 1105 High Untimed: 16.00 Hours			
1049 1107 Medium Untimed: 0.00 Hours			

Open Work Order

Complete Work Order

Print Work Order

Actions for this Technician ▶

Dispatch Actions ▶

Route & Job Order ▶

Change Schedule Duration

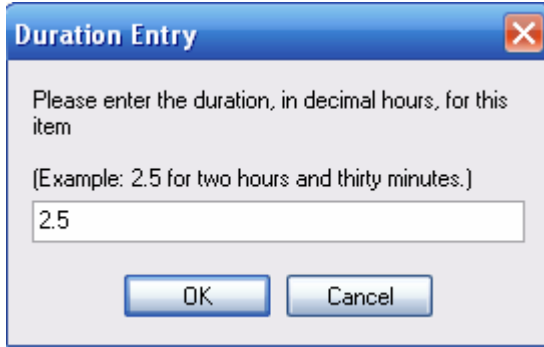
Move to New Date

Copy to New Dates

Grab Schedule

Drop Schedule

Enter the new duration and click the OK button to update the duration.



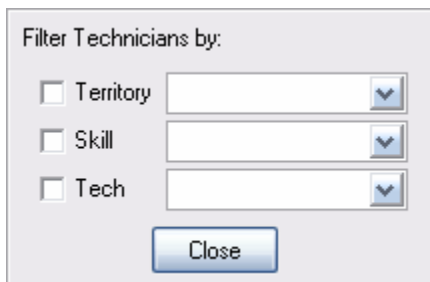
A dialog box titled "Duration Entry" with a close button (X) in the top right corner. The text inside reads: "Please enter the duration, in decimal hours, for this item" and "(Example: 2.5 for two hours and thirty minutes.)". Below the text is a text input field containing the number "2.5". At the bottom of the dialog are two buttons: "OK" and "Cancel".

Filtering the Scheduler:

ServiceLedger allows you to filter the **Dispatch Board** or other calendars using filtering by either **Territory**, **Skill** or **Tech**. This is useful if you only want to view certain information on the calendar.

Click on the  **Filter** button.

The Filter checkbox will open.



A dialog box titled "Filter Technicians by:". It contains three rows, each with a checkbox and a dropdown menu: "Territory", "Skill", and "Tech". All checkboxes are currently unchecked. Below these rows is a "Close" button.


1. Select the **Filter** options of either **Territory**, **Skill** or **Tech**, or a combination of each.
2. Use the drop-down on each option to filter to the specific records you are looking for.
3. Click the **Close** button to close the filter.


Note: When you are in filtered mode, the **Dispatch Board** and other calendars will remain in that mode until you reset the filters or close the **Dispatch Board** or calendar.

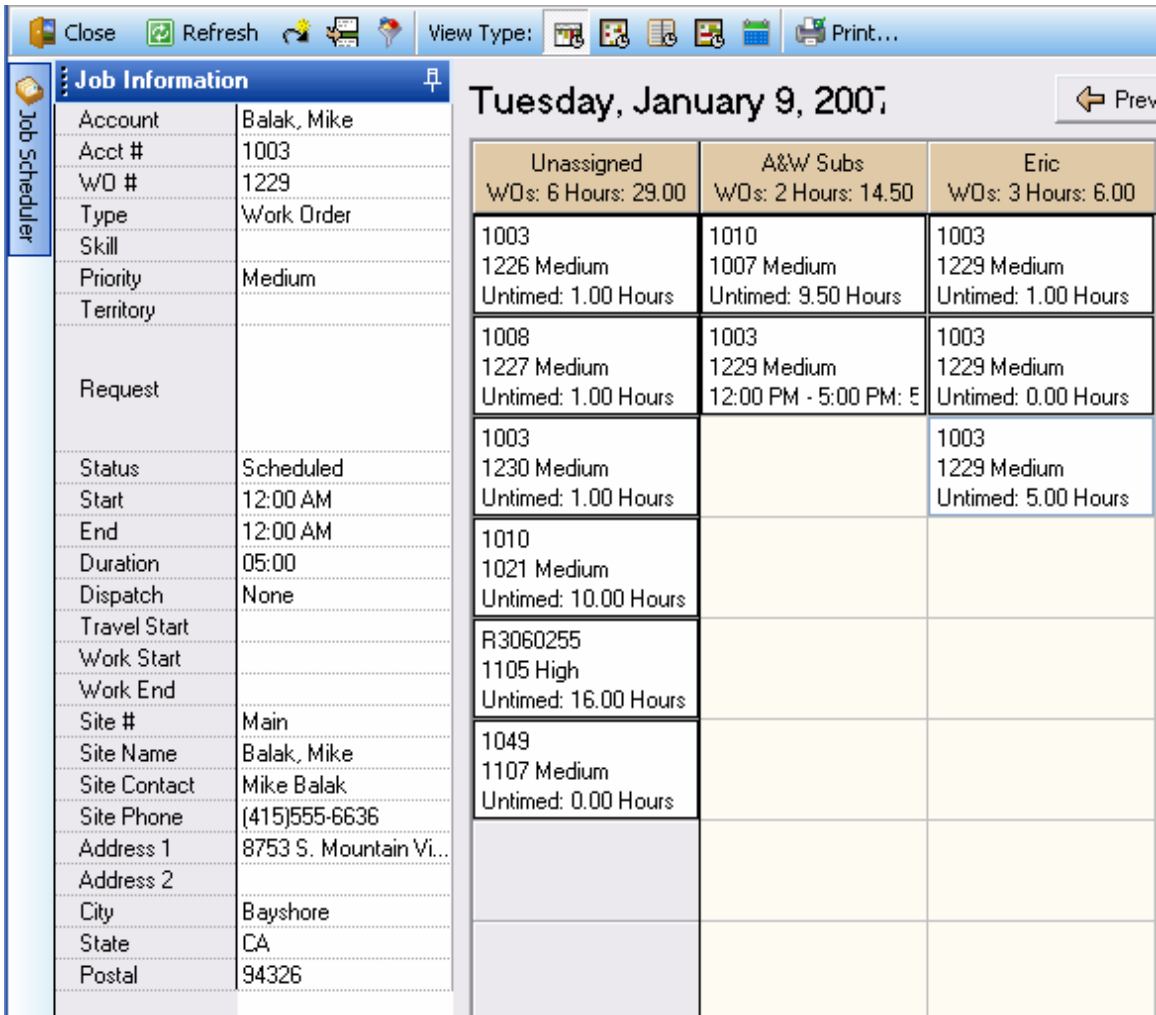
Using the Job Information Panel:

The **Job Information** panel can give you more specific information on the Dispatch Board without having to open the work order to get to the information.

Click on the **Job Information** button to the left of the Dispatch Board to open the Job Information panel.

You can have the panel stick by clicking on the  Thumbtack.

To unstick the panel, click on the  Thumbtack again. It will collapse to the left after a couple seconds of delay.



The screenshot shows a software interface with a top toolbar containing 'Close', 'Refresh', 'View Type:', and 'Print...'. Below the toolbar is a 'Job Information' panel on the left, which is currently expanded. The panel contains a table with the following data:

Account	Balak, Mike
Acct #	1003
WO #	1229
Type	Work Order
Skill	
Priority	Medium
Territory	
Request	
Status	Scheduled
Start	12:00 AM
End	12:00 AM
Duration	05:00
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

To the right of the Job Information panel is a 'Dispatch Board' for 'Tuesday, January 9, 2007'. The board has a 'Prev' button and is organized into three columns: 'Unassigned', 'A&W Subs', and 'Eric'. Each column has a header row showing total work order hours and a grid of job entries. The 'Unassigned' column has 10 jobs, 'A&W Subs' has 1 job, and 'Eric' has 2 jobs. Each job entry includes a job ID, description, priority, and untimed hours.

1. Click on a job in a cell and the Job Information will display more information about that specific job.

Managing Technicians:

From the Dispatch Board you can open a technician or sub-contractor record and schedule time off for a technician. From any technician cell, right-click and select either **Open** or **Schedule Time Off** to open the technician record or schedule time off.

Open Work Order	WOs: 2 Hours: 11.00
Complete Work Order	1008
Print Work Order	1227 Medium
	Untimed: 1.00 Hours
Actions for this Technician ▶	Open
Dispatch Actions ▶	Schedule Time Off
Route & Job Order ▶	Untimed: 10.00 Hours

When scheduling time off, it will open the technician record and allow you to enter the time off via the **Time Off** tab of the technician record.