This is a quick reminder of how to do some of the things we covered in the “Mastering Dispatching” webinar.

WORK ORDERS

CREATING A WORK ORDER
1. Click the New Work Order button on the Dispatch Board.
2. Search for the customer. We recommend doing this by address for the best results.
3. Select the customer if found. If the customer is not found create a new one.
4. Enter the remaining information. Be sure to fill out the required fields.
5. If this is an emergency call that you will be assigning immediately click Create and Close.
   a. Drag the newly created call to the tech and time you select.
6. If this is not an emergency, click Book for Later and pick an available time window that works for the customer. This is the preferred method as it allows you to quickly give a time to the customer that you know is realistic and then optimize your technicians’ routes so that they can spend more time working and less time traveling.

BASIC DISPATCHING
1. Click on Promised Appointment time if there is one. This will trigger the following actions.
   a. The work order location will be pinpointed on the map
   b. The promised time window will be selected showing you when your tech needs to arrive.
   c. Stars will appear next to some of your technician’s names. These are the techs that have the skill to perform the task associated with the work order.
   d. One of those stars will be gold. This is the tech that has the appropriate skill and will be the closest to the work order during the promised time window.
2. Drag the work order to the tech and time you select.

FINDING A WORK ORDER
Use this procedure to find any work order on the dispatch board.

- Click in the Search field and enter the customer’s name, address (of a particular part of it), or task.
- Click any column header to sort by it. Clicking the header again reverses the sort.
- Click the Promised Appointment link on the Unassigned and Completed views to jump to that work order on the board. Use the Scheduled Date link to jump to it when on the Assigned and Backordered views.
RESCHEDULE A WORK ORDER
There are two good ways to do this: reassign it to another time, or rebook it. Both methods start with finding the work order using the method described above.

- Reassign the work order to a particular tech
  - Set the dispatch board to the new desired date (if it is not going to be rescheduled for today)
  - Drag the dispatch to the appropriate tech and time.
- Rebook the appointment
  - In this situation we will be unassigning the work order and quickly finding a new time slot that matches the customer’s availability.
  - Click on the work order number in the Work Order Area or on the white part of the dispatch on the board.
  - Select Go to Details.
  - Click the Schedule button and select a new date and time window.
  - Click Book for Later.

SELECTING THE CLOSEST WORK ORDER
While the gold star will show you the closest tech to a particular work order, sometimes you need to see the closest work order to a technician instead. Use this procedure to find it.

- Select the technician on the map. This will show the location of all of their assigned work orders for the day.
- Enter the city or zip in the search to quickly find work orders in the area.
- Click on each work order in turn. They will appear on the map and show how they fit into the technician’s current route.
- When you find the one you want to assign, drag it to the technician on the Dispatch Board.
SCHEDULING LONGER WORK ORDERS
To assign jobs that will last longer than a day you need to create assignments to ensure the time is blocked off and no other work orders are assigned at the same time.

1. Drag the work order to the appropriate tech on the first day they will be there.
2. Change the date on the dispatch board to the next date you want to schedule the work. If the work order will extend several days it might be worth selecting the Week view on the toolbar before continuing.
3. Click on the white part of the work order to bring up the details.
4. Click View Assignments. This will display the work order under the Assigned section of the Work Order Area.
5. Drag the work order up to the new date and release it at the desired time.
6. Adjust the duration and start date if needed.
7. Repeat steps 5 – 6 for any additional days if needed.

ASSIGNING HELPERS
Sometimes you just need a helping hand. Use this procedure to assign more than one technician to a work order.

1. Select an assigned work order by clicking the white part of it on the Dispatch Board.
2. Click View Assignments. This will display the work order under the Assigned section of the Work Order Area.
3. Drag the work order to another technician at the desired date and time.
4. Select Add Assignment.
5. Repeat steps 3 – 4 to add more technicians to the work order.

CHANGING THE PRIMARY TECH
The primary tech is the only one that can create an invoice in the field, fill out custom forms, edit equipment, etc. But sometimes you have to pull the primary tech off a work order to have them do something else. Use this procedure to reassign the primary technician.

1. Have the primary tech change the work order to a Pending status if it isn’t already. This ensures that all the changes they have made to the work order so far are saved.
2. Click the white section of the work order that is assigned to the primary technician on the Dispatch Board to bring up the work order details.
3. Select Unassign.
4. Check Unassign All and select Yes.
5. Switch to the Unassigned section and drag the work order to the new primary technician.
6. Click Show All to clear the search filter.
BLOCKING OFF TIME
You can easily mark a tech unavailable for a certain period of time by following these simple steps.

• Creating unavailable time
  • Make sure you are in the Shift or Full Day view of the Dispatch Board.
  • On the line associated with the tech you want to affect, click and drag from one blank time to another. This will highlight the area.
  • Enter a name or reason for the time and click Save.
• Releasing unavailable time
  • Click on the unavailable time entry.
  • Click Delete.

CONFIGURATION
GROUPING
You can assign employees to groups so that you can easily see groups of techs. This is great for breaking out multiple trades (such as HVAC and plumbing), or separating service techs from salespeople and installers. To get started go to Settings and click on Employees. Select an employee and then choose what you want to do from the options below.

• Adding a new group
  • Click in the Assign to Dispatch Group field and enter the name of the new group you want to create.
  • Click the Add button. This will create the group and assign the technician to it.
  • Save the employee.
• Changing the employees dispatch group
  • Select a different dispatch group and save the employee.
• Removing a dispatch group
  • Reassign all employees in the group to another one. Once the last employee is removed from the group it will disappear.
• Setting a default group
  • Make your dispatchers’ job easier by automatically bringing them to their preferred board every time by selecting it in the Default Dispatch Board field.
CHANGING THE EMPLOYEE SCHEDULE

FieldEdge allows you to create complex schedules to handle expanded hours, holidays, and designate the on call technician.

1. Click on an employee's picture on the Dispatch Board
2. Select Employee Schedule
3. Click on any day to change the employee's hours or to show that they are on call that day.

SKILLS

- Creation
  - Go to Settings
  - Select Skills
- Assign to Task
  - Go to Settings
  - Go to Tasks
  - Select or add a task
  - Add skill and save
- Assign to Employee - There are two ways to do this.
  - In advance
    - Go to Settings
    - Go to Employees
    - Select an employee
    - Check appropriate skills and save
  - On the fly
    - Drag a work order to an employee without a star next to their name on the Dispatch Board. This will prompt you to assign that skill to the employee.
**TIPS**

**KEEPING THE DISPATCH BOARD OPEN**

Did you know you can keep the Dispatch Board open even when you need to drill into a work order? To do so just click the scroll wheel on your mouse when hovering over the Go To Details link to open the work order details in a new tab. You can also right click that link and select Open link in new tab or Open link in new window if you don’t have a scroll wheel on your mouse.

**CUSTOMIZING THE WORK ORDER AREA**

You can customize the columns that show up in the Work Order Area of the dispatch board to ensure the information that is important to you is visible without scrolling. Follow these steps on each tab to save the layout the way you like it.

1. Click the Hamburger menu.
2. Check the columns you want to see. Uncheck the ones you don’t need.
   
   *Hint: Select the priority box if you are unsure what all the flag colors mean. It will show you the name of the priority.*

3. Click the Hamburger menu again to close it.
4. To rearrange columns, click the header and drag it left or right.
5. To resize columns, click the line in the header dividing one column from another and drag.

6. **IMPORTANT:** Once this is set to your satisfaction click on the Dashboard to save your changes.
7. Return to the Dispatch Board and repeat with any other tab (Assigned, Completed, Backordered).