Service Autopilot™

DISPATCH CALENDAR

User Guide

Version 1.0

Table of Contents

Summary

The Dispatch Calendar was driven by the desire to have a more streamlined alternative to the very robust Dispatch Board, and by the necessity to keep the software as accessible as possible to all levels of users and the widest variety of companies.

Taking advantage of a more intuitive drag and drop interface that better mirrors other interactive software and web sites that people are using, the Dispatch Calendar is easy to learn, easy to interact with, and quickly accessible to new users and to users who do not need the added functionality of the Dispatch Board.

While the Dispatch Board works very well for Landscaping and Lawn Care companies, the Dispatch Calendar more readily meets the changing daily needs of companies who do things like cleaning and who frequently create ad hoc teams on any given day based on workloads, instead of necessarily working with more static crews who work the same jobs in the same order each week.

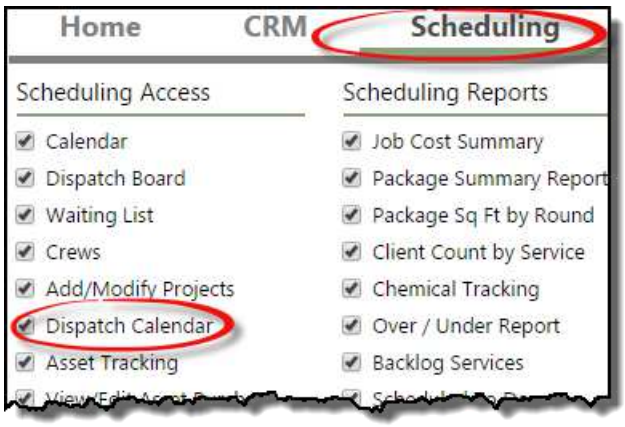
Among the trimmed down aspects of the Dispatch Calendar, you'll see that there is no "Actions" button, though much of the functionality – except splitting assignments and pinning multi-day jobs – is available elsewhere in the Calendar. Additionally, routing is automatic for the Dispatch Calendar, since it works in time slots.

The Dispatch Board and the Dispatch Calendar are integrated, however, so that any changes made to one naturally appear immediately on the other.

Getting Started

For Beta purposes, you need to have someone from Service Autopilot™ turn on the Dispatch Calendar for you.

Once you have done that, go to **Home>Settings>User Roles and Rights** and choose a Role to edit. There is a "view" Permission associated with the calendar under "Scheduling Access" on the Scheduling tab of the Roles and Rights permissions screen.



Calendar Setup – Resource Timeslots

Before you start working with the Calendar, you need to set up Resource Timeslots. If you have no Timeslots available, your Calendar will be empty and you will be unable to manipulate it. Go to **Scheduling>Settings** and look for **Resource Timeslots**.

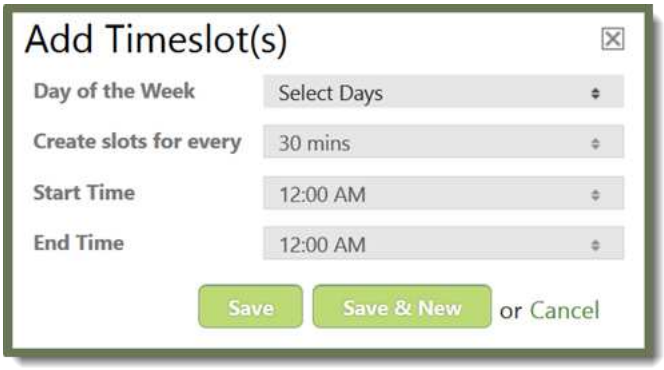
The Timeslots screen allows you to add appointment times with a good deal of customization for each day. If your screen starts out blank, you will see underneath the title that there are "0 items," meaning that there are no appointment times available.

Add timeslots (=appointment times) from the "Add Timeslot" button on the right or from the Actions button.

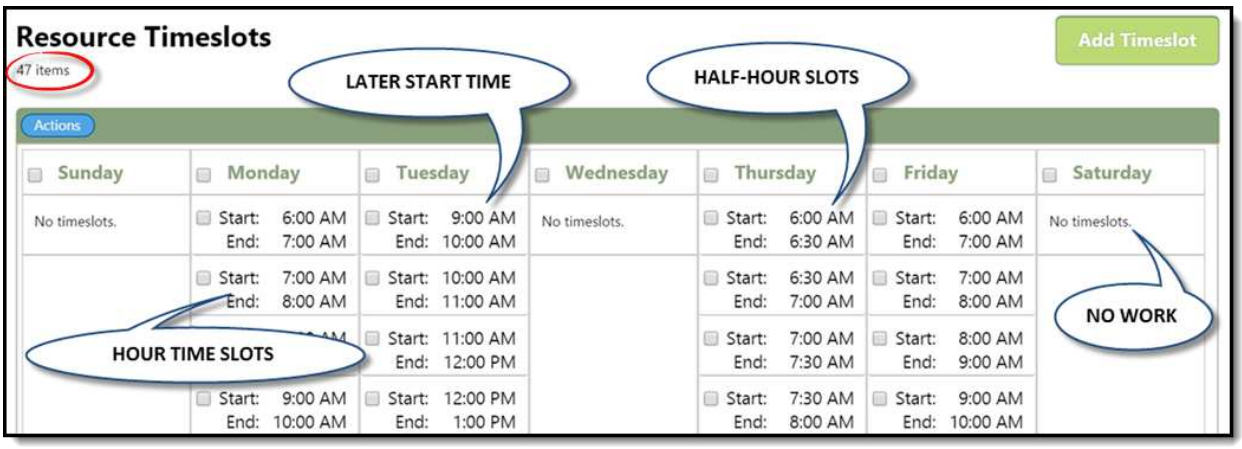
This opens the **Add Timeslot(s)** popup.

"Add Timeslot(s)" Popup

This popup allows you to edit the calendar per day, several days at a time, or per timeslot. A "slot" is one appointment time.



Select the days from the drop-down under “Day of the Week.” You can create slots for a number of time options, ranging from half-hour slots to multiple hours at a time. You can also adjust one appointment slot or add one for a given day as well. Single day additions, though, are more for an exception that you need to make on any given day or week.



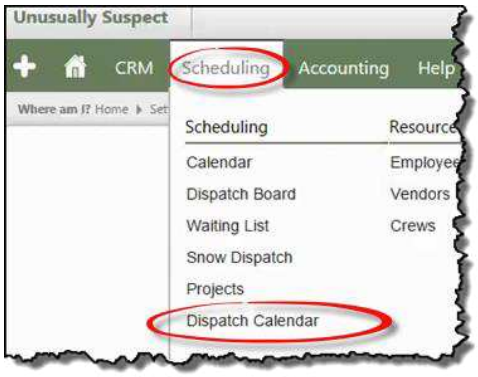
A completed Resource Timeslots screen might look like this:

The “47 items” under the screen name tells me that I have 47 appointment slots available per Card per week. A “Card” is either a Resource, a Team that you create on the fly, or a Crew. If I have two employees who always work alone, that would give me 94 appointment times to schedule in total per week.

NOTE: “End Time” refers to the time at which you want the last appointment to END.

Where to See the Dispatch Calendar

The Dispatch Calendar appears under the Scheduling tab.

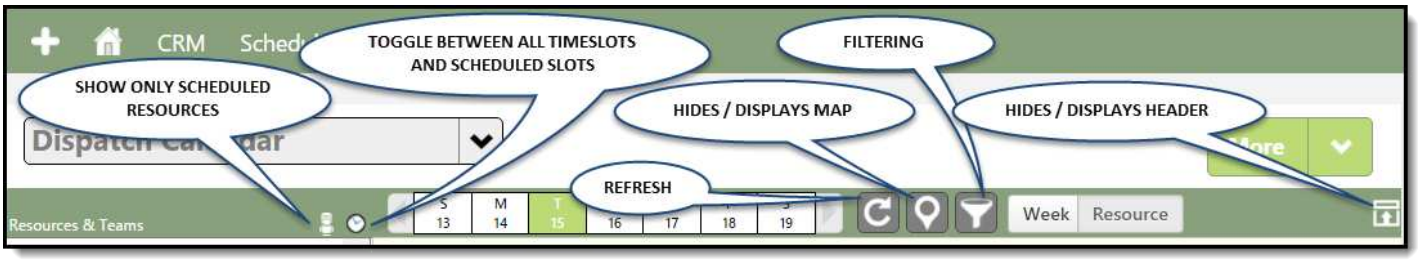


Understanding the Dispatch Calendar Screen

Designed for daily and weekly scheduling, the Dispatch Calendar Main Screen allows you to see a more streamlined version of work you have scheduled, though with most of the major functionality of the Dispatch Board.

Calendar Icons

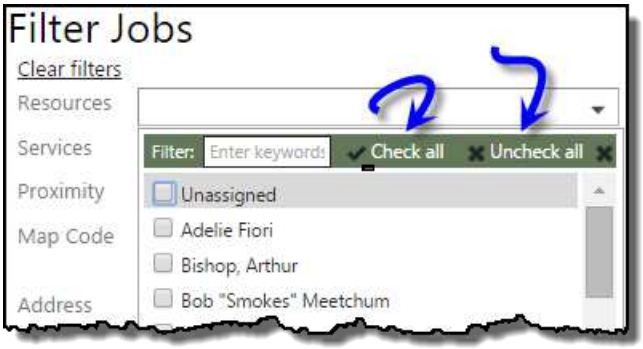
The Dispatch Calendar main screen can be viewed by **Week** or **Resource**, with a good deal of customization, but the main icons will remain the same.



Main Screen Filtering

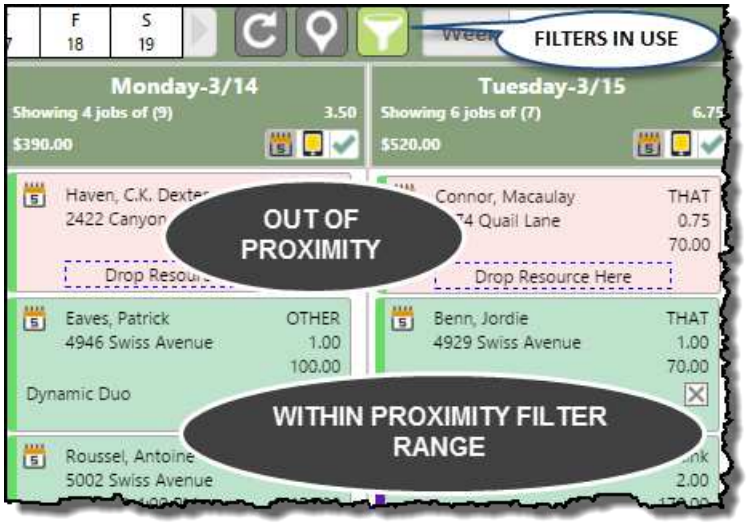
The funnel icon is your filtering for the main screen and the "Resources & Teams" Panel. Clicking on it opens a dialog with all the filtering options that you see on the Dispatch Board and the company calendar.

If you filter Resources using the "Show Scheduled Resources" button, here is where you would reset the screen to show Resources. Click the Resources dropdown to select the Resources you'd like to see or uncheck/check all.



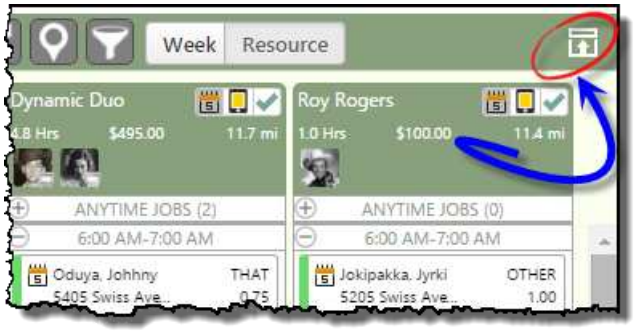
As on the main Dispatch Board, the proximity filter, when set, will display in green all jobs within the proximity margins you've set, while other jobs will display in pink.

When there are filters in effect, the icon will turn light green.



Maximing the Screen

There are two ways in which you can hide portions of the Dispatch Calendar in order to maximize the screen. You can hide the Header and you can hide the Resources & Teams Panel.

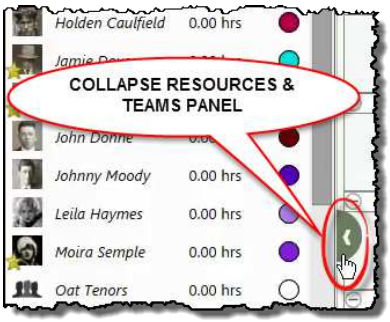


To hide the Header, click on the up arrow on the top right of the main calendar. You'll notice that the arrow in the icon is pointing up, as that is the direction the main screen will "move" when you click it.

This removes the Header: the Screen Views dropdown, the Service Autopilot tabs, the breadcrumbs, and the "More" button. When you want to see those again, click the

same icon, which will now have a down arrow indicating that you are pulling the Header down into the screen.

For the left panel of Resources & Teams, you'll notice a faded left-facing caret midway down the page. Hover over it to highlight it. Click it to remove the left panel.

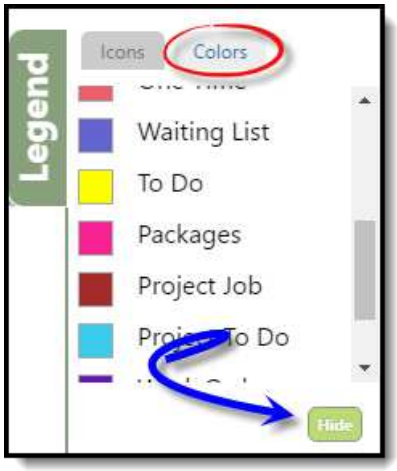


It, too, will change direction when the panel is hidden so that you can pull the panel back onto the screen by clicking again.

Screen Legend

In the "More" dropdown menu, you can choose to view the Legend. Clicking on "Show Legend" enables the right margin "Legend" that is clickable for an expanded view that displays the Icons in one tab and the Colors that appear on the Dispatch Calendar in a second tab.

Any color customizations you make to the cards on the Dispatch Calendar will show in the "Color" tab of the Legend.



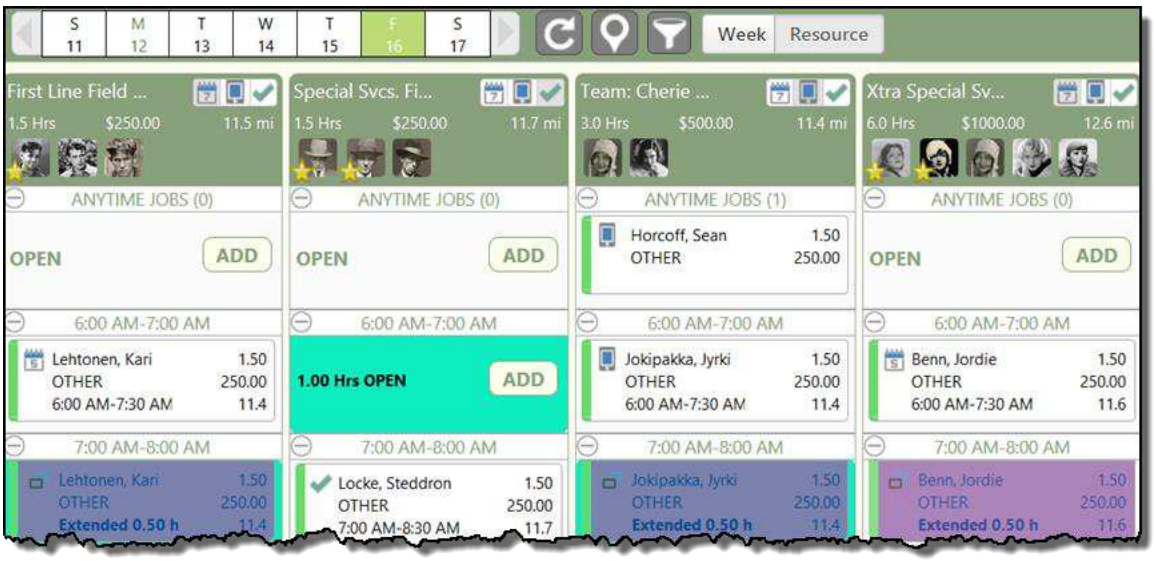
While the Legend is expanded, clicking the "Legend" text will collapse it against the margin.

Click the "Hide" button at the bottom right to remove the Legend and place it back onto the "More" dropdown as an option.

At the end of this chapter, there is an itemized list of the Legend Icons.

Resource View

This view displays any combination of Resources for a day, alphabetically, from left to right.

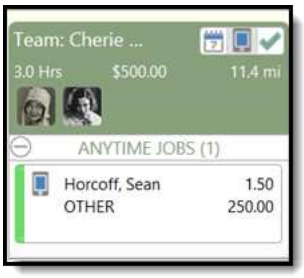


Date Navigation in Resource View

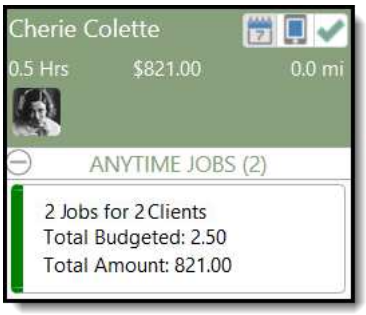
In **Resource View**, click on a day to get that day's information. Click the arrows to the left and right of the current week's dates in order to move back and forth a week at a time.

Viewing Timeslots

In Resource view, click the plus and minus circles on the left of the timeslots to expand or hide that row from view. Since you may have several "Anytime" Jobs scheduled in a day, the collapsed view will show in parentheses how many Jobs are scheduled in that spot. Regular time slots can only have one Job per time per card, so there are no numbers displayed when the slot is expanded.

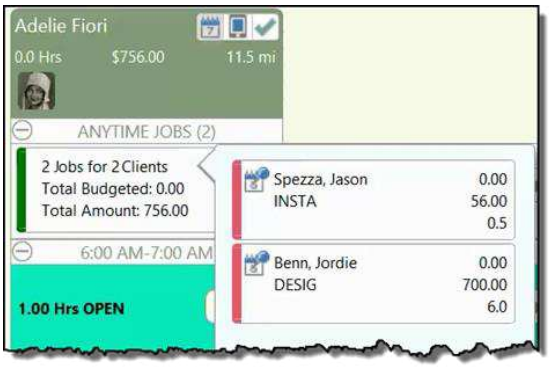


If you have only one Anytime Job scheduled, that Job will appear in the Anytime timeslot for you to drag and drop elsewhere if you choose. At left, "Team: Cherie…" has one Anytime Job for Sean Horcoff.



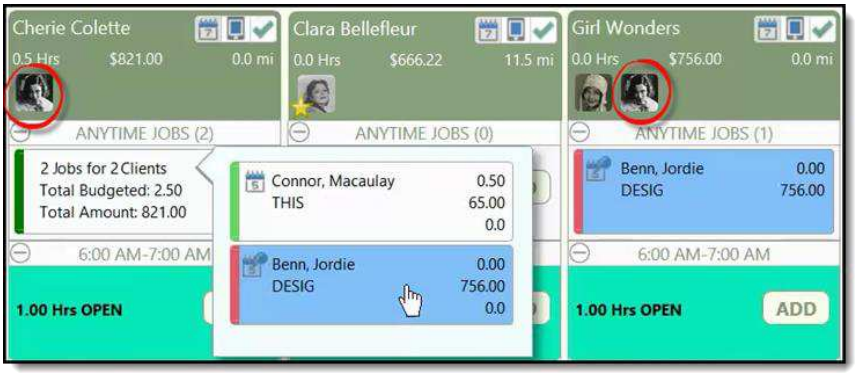
If you have more than one Job scheduled with no start or end time, that timeslot, collapsed, will give you some basic information about those Jobs.

Clicking into the card expands the Jobs so that you can drag and drop them individually elsewhere on the Calendar.



Note that "Anytime Jobs" always appear at the top of the screen to be dragged and dropped where you wish as the day's schedule permits.

If any of the Jobs assigned to one Resource are also assigned to that Resource on a separate card, hovering over the Job will highlight it under both cards. At right, Cherie Colette has an independent Job for Macaulay Connor but is also working part of the day on the Girl Wonders Team.

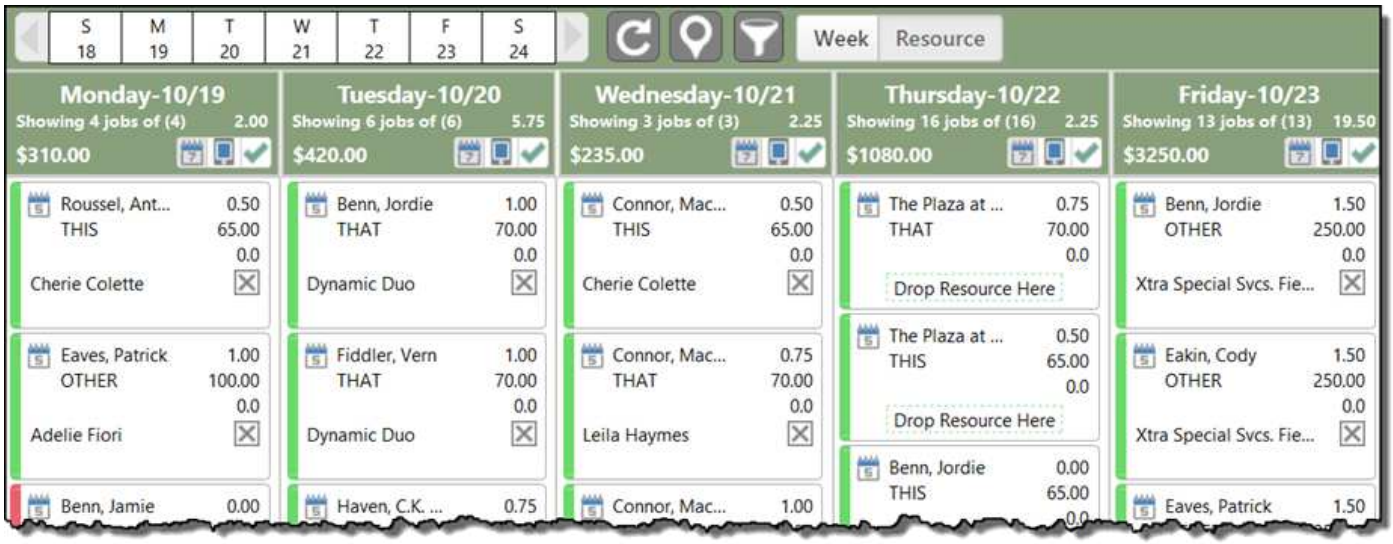


Job Cards

The information that Job Cards contain varies based on the customization you do for the cards (Customizing Resource Cards) and the size of card you decide to view, but they will all contain the Job's status, the time of the appointment, if any, and icons associated with Products, Notes, Phone Calls, and Photos, if applicable.

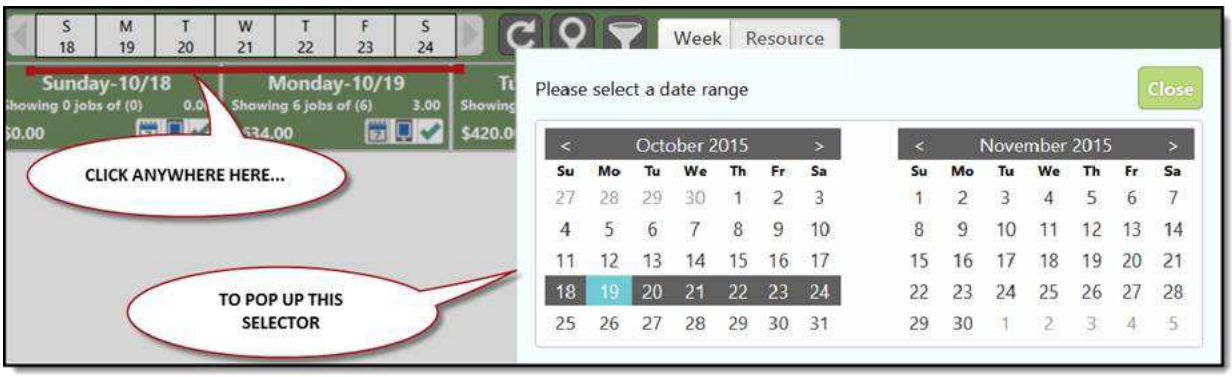
Week View

Week View displays the Jobs per day of the week, Sunday through Saturday. As a default, it will open the current week. You can view more than a week at a time by changing the date range.



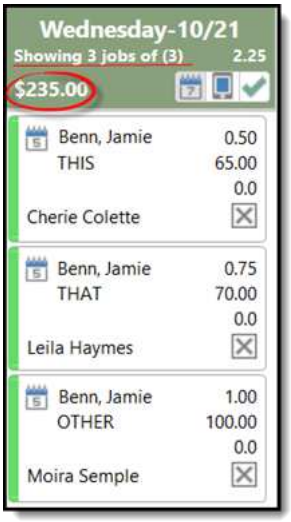
Date Range Navigation in Week View

Since you are viewing a week at a time, there is no benefit to clicking on an individual date in the header. Instead, clicking anywhere in the week's dates will open a date range selector, allowing you to see more/different dates.

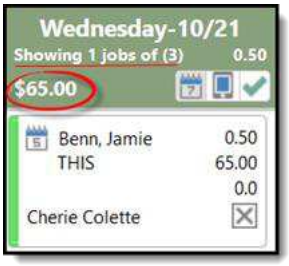


Day Headers

The Week View is broken up by columns of Days. The header of each day contains summary information about that day similar to the way the Resource cards do.



You may see all or some of the Jobs for a day based on the filters you have in place. At right, all three Jobs for the 21st are showing, as is the total for that work and the total amount of time scheduled for them.

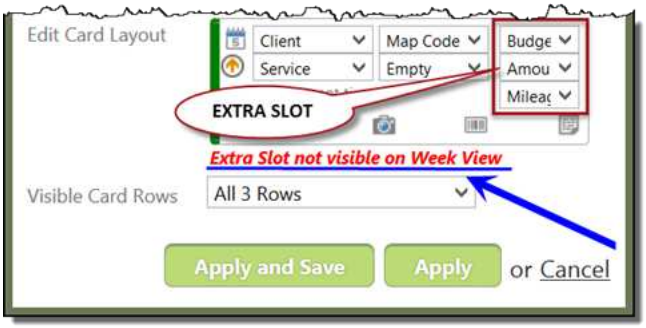


If you have Resources filtered out, as in the image at left, the header will reflect that ("Showing 1 jobs of (3)"). The dollar amount will be based only on the displayed Jobs.

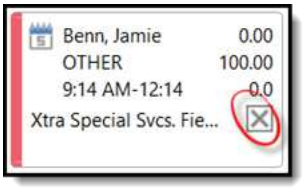
Filtering affects bulk status updates and routing as well. Jobs filtered out of your view will NOT change status or be considered in routing.

Job Cards

In the Weekly View, Job Cards always display in medium size. If you choose large or extra-large for your card size, the popup will give you a message letting you know that some information may be lost from the view if you have things displaying in the 3rd, right column.



On the cards themselves, Resources appear at the bottom with an X next to them, so that you can remove resources with a click. You can always add Resources by dragging and dropping to already-assigned Jobs.

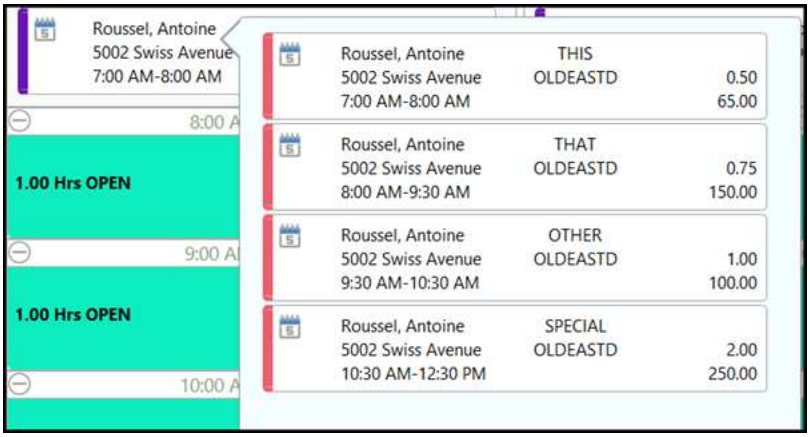


Any Job without Resources assigned displays help text onto which you can drag and drop Resources.

Work Orders

Work Orders appear on the Dispatch Calendar in both Resource and Weekly View as one Job. The Service Name of that Job will be the Work Order name (below, “Rou-Fete”) and the sidebar will be colored to reflect that it is a Work Order (see Customizing Resource Cards).

When you click on the main Job, a popup with the attendant Jobs displays. Since those Jobs are attached to the Work Order, you won’t be able to drag and drop them.

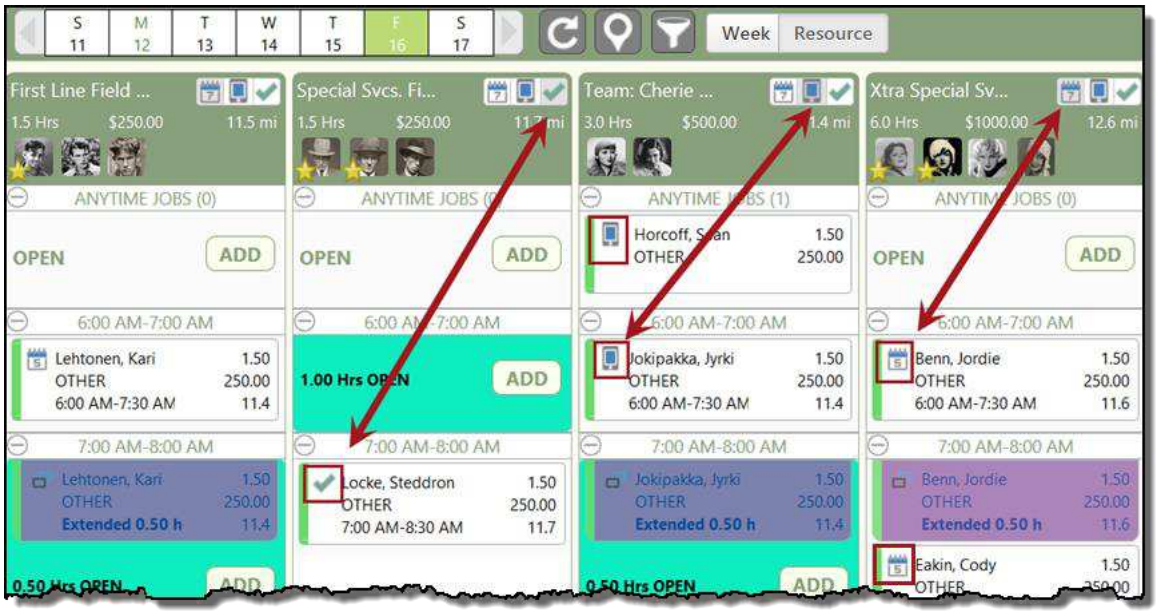


You’ll also notice that hovering over the Job on one Resource card highlights the Job on all Resources assigned for any of the Jobs associated with the Work Order, just as regular multiple assignment Jobs display.

Editing Job Status

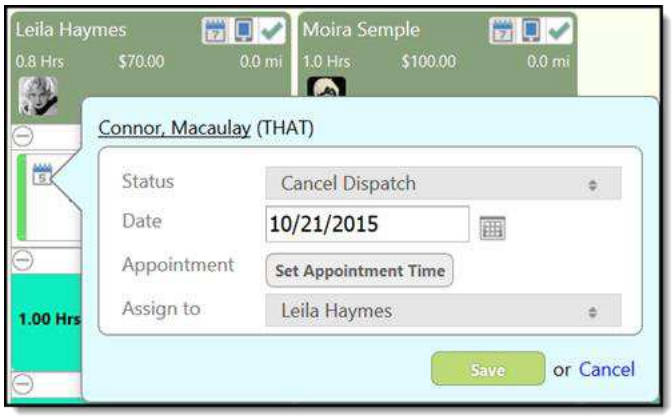
Bulk Status Edit

You can bulk edit a Resource Card's Job Status or a Day's Job from the icons in a card's header, as I've done below. This makes it easy, for instance, to Dispatch all of a Resource or Day's Jobs at once. The status of the Jobs or a particular Resource, if they have been bulk edited, will show slightly greyed as below.



Individual Status Edit

The quickest way to edit an individual Job's status in either view is by clicking on the status icon on the Job to pop up a status window, in which you can change not only status but also the Date, Appointment Time, and Assignment.



You can also click on the Job itself to open the full Job Overlay.

Emailing Clients

In the **More** drop-down, you'll see the "Send Email" link. Email works a little differently on the Scheduling Calendar because of the functionality.

Clicking on email adds the "Email" and "Cancel" buttons to the top of the screen.

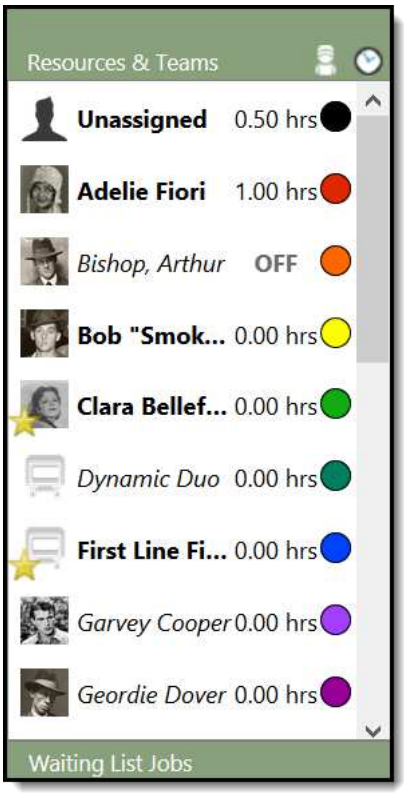
Once they appear, your screen will "freeze" and you will no longer be able to drag and drop Resources or Jobs. This is so that you can click on the various Clients to whom you would like to send email. As you click on a Job Card, it will highlight and you can then click the "Email" button to pull up the Email Overlay.

If you attempt to send Email without anyone selected or with invalid email addresses, you will receive an error message at the top of the screen.

To get back to regular Calendar mode, simply click the "Cancel" button, which will remove the email options and return your screen to drag and drop capability.

Resources & Teams Panel

On the left of the screen, the Resource & Team Panel displays Resources, Teams, and Crews and also houses Waiting List Jobs. You can hide/show this panel, filter the information on it, and also edit some of that information.



Starred Resources are Team Leaders. Any Crew (First Line Field Crew, for instance, above) or Team with a Star next to it has at least one Resource assigned to it who has been assigned the Team Leader role in the software.

Resources, Teams, or Crews that are **bolded** are showing on the Calendar, whether or not there are Jobs scheduled for them. Click on a Resource in the panel to show/hide that Resource's associated Jobs. This will work in both Resource and Weekly Views: in Resource View the Card is hidden when a Resource is unclicked, while in Weekly View those Jobs are hidden and the missing Jobs are reflected in the Header job count (see Day Headers).

Resource Information

Click on the colored circle on the right of any Resource, Crew, or Team to view more information. The only aspect of the popup that is editable currently is the Map Pin Color. You can see, however, a summary of the Day's work (or week's work on Week View) and the Resource's Schedule.

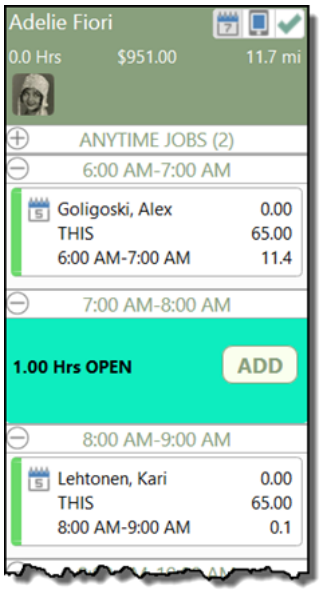
Show Scheduled Resources

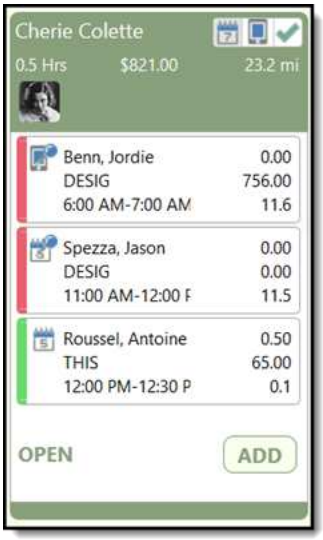
The Show Scheduled Resources icon filters the screen down to only those Resources who have scheduled Jobs. If you want to view all of your Resources again, scheduled and unscheduled, click the Filter icon and "Clear Filters."

Toggle Timeslots

Use this icon to switch between how you view the Jobs on the Calendar. You can see either all of the slots per day or Resource, or you can choose to display only filled slots.

If you want to view all timeslots, open and filled, they will appear in order with “Add” buttons in the empty slots wherever those slots appear (at right). When you are Customizing Resource Cards, you can choose the color of those open slots.

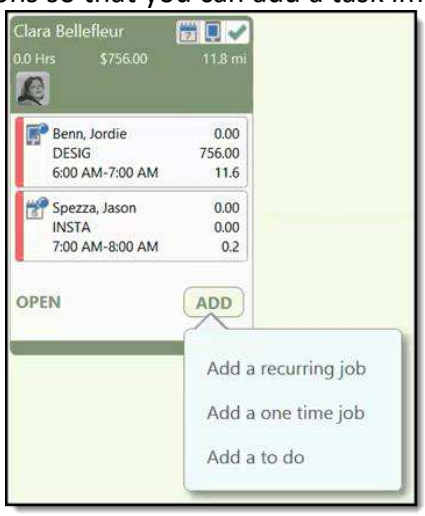




Toggling to only scheduled work will show all Jobs in order of time, but if there are gaps between jobs, you will **NOT** see those as empty space on the Calendar. Make sure you’re paying attention to the time that displays on each Job.

At left, my first Job is from 6am-7am and the next one, at 11am, appears directly under the 6am.

Regardless of how you are viewing the Timeslots, clicking the “Add” button pops up Job/To Do options so that you can add a task immediately to the Calendar.



Teams

Unlike Crews, which are permanent and frequently have set routes and Clients, Teams are intended to be created on the fly based on a given day’s needs and Resources.

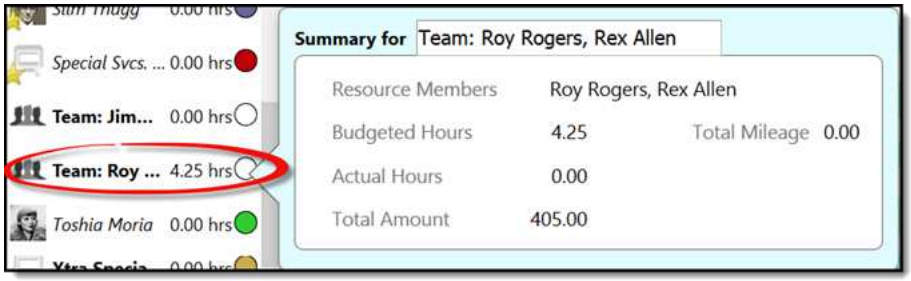
Creating Teams

Dragging a Resource or Resources onto another Resource's card, creates an ad hoc Team of those Resources for all Jobs for that day. The team will initially appear alphabetically with the other filtered Resource Cards, as "Team: Name of Initial Resource, Name of Added Resources."

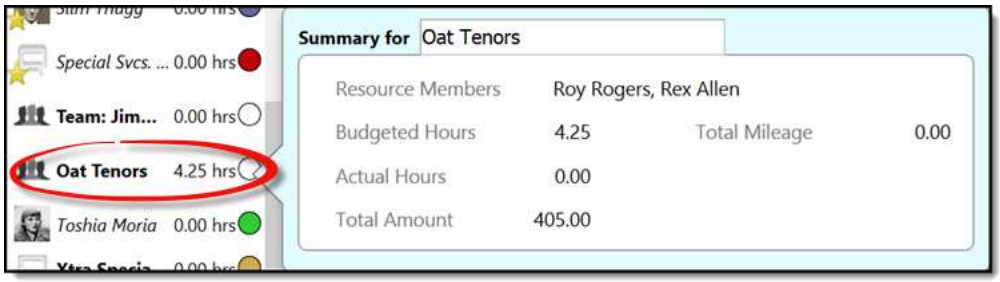
NOTE: Dropping a Resource onto a <u>specific Job</u> will create a Team just for that Job. Dragging a Resource onto the <u>Resource Card Header</u>, where the Resource image and summary information for the day sits, will create a Team for the entire day's work.

Naming Teams

Although Teams are initially named based on the primary Resource, you can rename them to suit your preferences. Clicking on the circular color mark next to a Team in the left panel opens a popup with information about the Team, including the names of the Resources assigned to that Team.



To rename the Team, simply click into the text field and overwrite the current name. That will reorder the Team alphabetically and your changes will automatically be updated and saved into the current screen view.



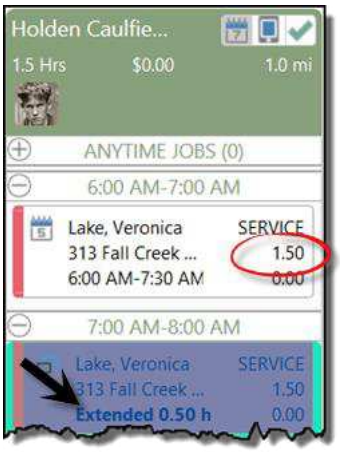
Removing Team Members

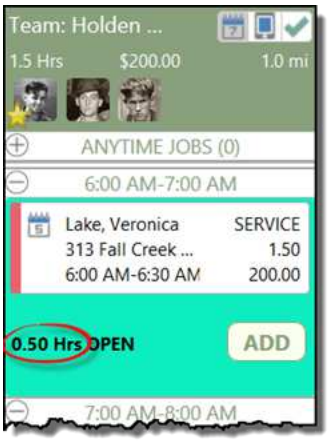
Remove Resources from Teams by hovering over that Resource's image and clicking on the red X that appears. For a two-person team, this removes that Team's card.

Budgeted Hours with Teams

When you add Resources to a Job, the Calendar automatically adjusts the Budgeted Hours to accommodate that Resource. Removing Resources will auto-adjust the times back and show open time in the timeslot.

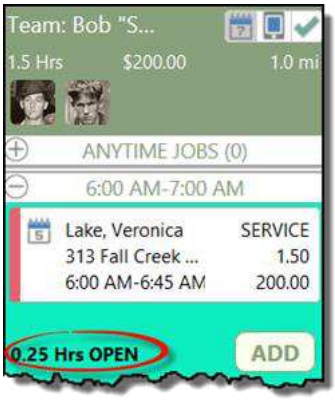
Let's take an example of Veronica Lake. She has a Service Call scheduled for 6am-7:30am with Holden Caulfield assigned. At right, you see that there are 1.5 hours budgeted and the appointment has been "**Extended 0.50 h**" into the 7am-8am timeslot.





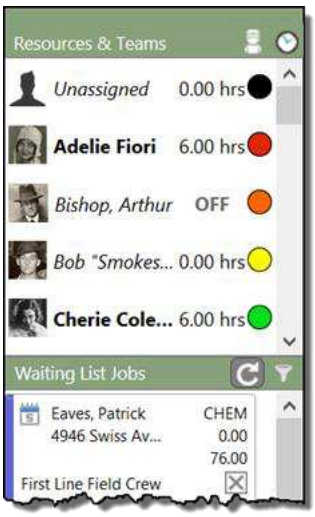
It turns out that Jimmy and Smokes were available to take that Service Call, so now we have three Resources assigned and the time has adjusted to half an hour with "**0.50Hrs OPEN**" at the end of the 6am-7am timeslot. You still see the original Budgeted Hours for Job Costing.

At the last minute, we needed Jimmy to go to another Job, so we removed his assignment, and now a two-man team will be handling Veronica's Service Call, which has adjusted the time up to three quarters of an hour.



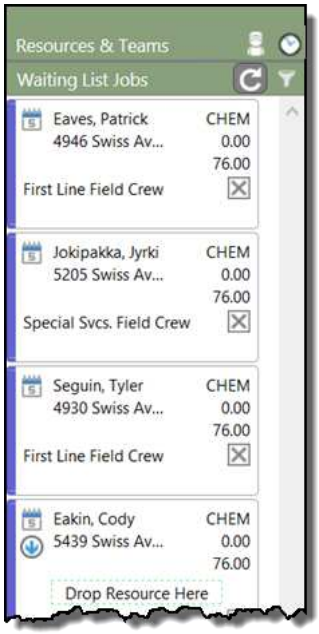
Waiting List

The Waiting List sits at the bottom of the Resources and Teams panel. Clicking on the "Resources & Teams" text once at the top of the Panel pulls up the Waiting List and hides Resources and Teams (right).



A second click on "Resources & Teams" will drop the Waiting List to halfway down the panel (left).

Hide Waiting List Jobs in the panel by clicking on it again. To quickly view/hide Waiting List Jobs in the full panel, click "Resources and Teams" to pull up the Waiting List and "Waiting List Jobs" to collapse it entirely.



Filters

The Waiting List loads initially without filters. After filters are in place, the panel will alert you to them in both half- and whole-panel viewing.

To remove filters, click the filter icon and then the "Clear Filters" text at the top of the popup.

Job Cards

Jobs appear the same way that Weekly View Cards do on the Calendar. Dispatch them by clicking on the calendar icon in the Job card. Drag and drop Resources onto Waiting List Jobs, and remove them the same way you would with the cards in the Weekly View.

Customizing Resource Cards

From the "**More**" dropdown, you can choose a high level of customization for Resource Cards. Determine how big the cards are based on how much room you need on your screen, ranging from Tiny to Extra Large. You can also decide what colors represent each task and customize the information that appears on the Calendar cards.

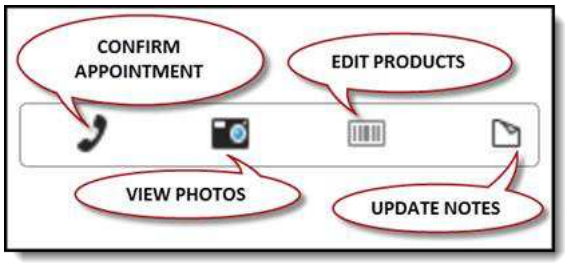
Edit Card Layout

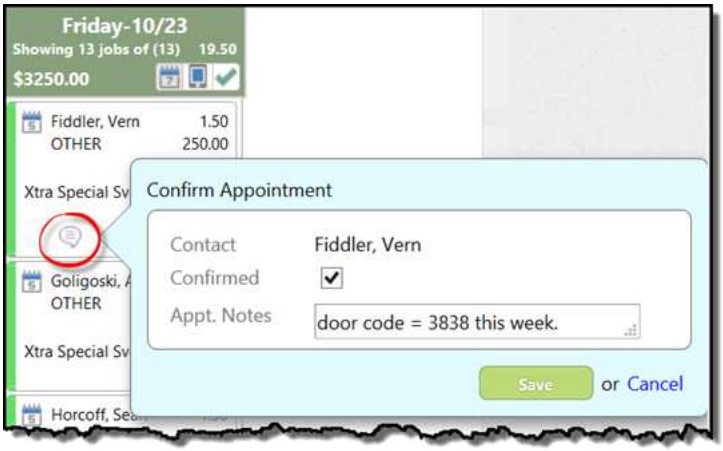
Regardless of the size of card you choose, the layout will attempt to display whatever information it can based on your preferences. The smallest card layout will only offer one column worth of fields; whereas, the larger cards have room for more fields and accordingly give you more options in this layout area.

Clicking on any drop-down arrow displays a list of field options from which to choose. The list is the same for each drop-down. You can also choose "Empty" for any field if you prefer not to display extra information on the cards.

Card Icons

The top left of the card displays the status of the Job and the Job's priority, if the priority has been set to high or low. There are four other icons that will show on a card if they have been triggered by the Job set-up. If you have no Products, for instance, on a Job, the Product icon will not appear on the Card. On the Customize Card popup, however, we show all four of them so that you can see where they would appear in the layout.

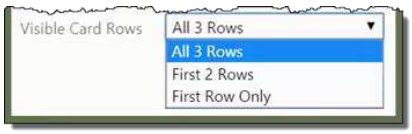




All icons will open a small popup with icon-specific information, except the Edit Products icon. That will open the Job Overlay directly to the Products area. The "Confirm Appointment" icon will change from a phone to a dialogue balloon once you have confirmed that appointment (at left).

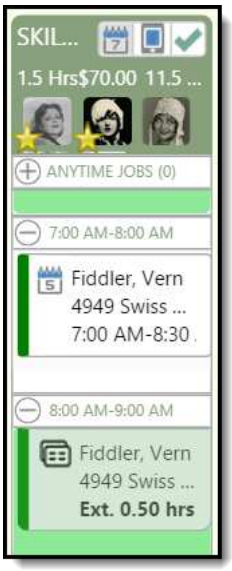
Visible Card Rows

You can choose how many rows of information you want to view on cards. The top row, which you can customize, always shows, but if you want to see other information, you can display an extra row or two. The third row displays Appointment Time.



As you change the size of the cards, the amount of information appearing on them increases or decreases. Tiny Cards will only fit Job Status, Priority, icons, and two of the drop-down options. The XXL Cards, however, will be able to show much more information. If you keep the most crucial information on the top rows, you will find that you can drop the size of your cards to fit more on the screen without losing quick access to what you want to see.

On the Tiny Card to the right, the full Crew Name has been abbreviated to the Crew Code (SKILLERZ) -- which has been abbreviated again (SKIL…) -- to save space – a very good argument for **concise crew names**. The scheduled hours, price, and mileage have been condensed as well to fit into the card, and you only see the first three members of the crew. On the Job itself, only the left column of options appears.



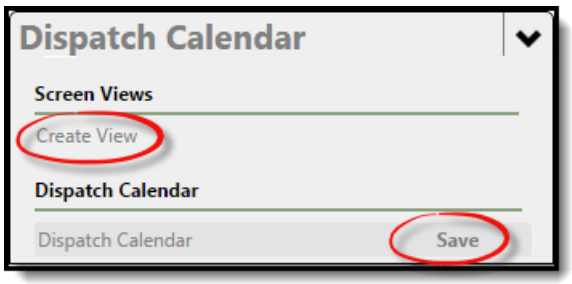
The Extra Large Cards, however, can show it all. Below, I've chosen three columns of information, including the Map Code, Budgeted Hours, Rate, Service Name, and the Last Service Date (not applicable here) -- and the full street address still has room to display.

Applying Card Preferences

There are two buttons at the bottom of the popup: **Apply and Save** and **Apply**.

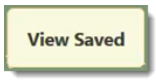
If you choose only to **Apply** the changes, a message will pop up letting you know that you must save the screen view in order to keep those changes.

Either go to the Scheduling Calendar drop-down and hit "Save" next to the Scheduling Calendar default view, or create a new one.



Choose **Apply** if you only want to see your changes for your current session in the Calendar.

Apply and Save will save to your Screen View any customizations you make, so that the cards will appear the same way every time you open the Calendar. Again, you will see a small screen message telling you this.



Using the Map

The Calendar integrates with the Dispatch Board, so any routing changes you make to it will be reflected on Dispatch and vice versa. Click the Map icon to show the Map in the top portion of your screen.

The Calendar automatically Routes Jobs based on the time slots they've been assigned. There is no manual routing, nor will you optimize or use Group Stops when in the Dispatch Calendar, since the understanding is that you schedule the Jobs with times and the Map follows your lead.

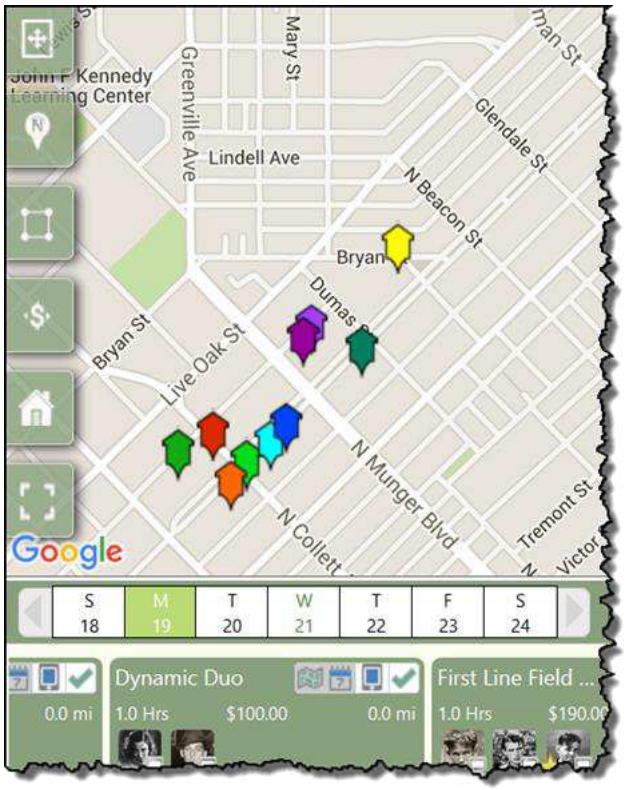
The Map will default to the top portion of your screen. Hide it by clicking on it again.

Enlarge it by clicking on the show/hide button on the right. "Hide" will hide the bottom of the screen with the Resource or Job cards, giving the map more room. Clicking on the arrow icon will hide the top portion of the screen to give the map more room.

TIP: You might want to hide your Resource Panel while viewing the Map in order to maximize the screen space.

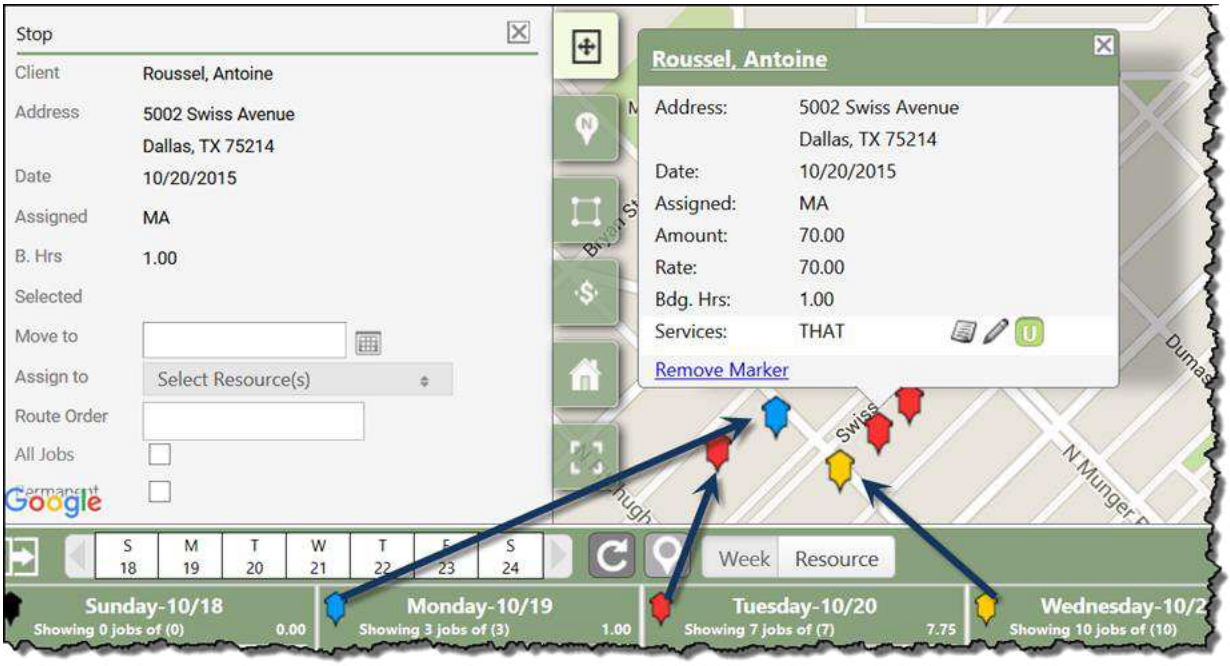
Once you've opened the Map, a new Map icon will appear on each Job or Resource card allowing you to toggle to show that Job on the Map or hide it.

In Resource View, each Resource's individual color will appear on the Map to distinguish Jobs assigned to different Resources (at right).



The Map itself has full functionality. Below, I've clicked on a Map pin to open a small overlay allowing me to see information about the Job, edit it, go to the Client's screen, and update the Job. You can also expand/collapse the left portion of the screen by clicking on an icon (in light yellow below).

Notice that the days in Week View each have a color assigned.



Screen Legend Detailed Icon List

Scheduled. Job pending dispatch. The Job will not print on the Route Sheet or show on the Mobile App.

Scheduled (New). This Job has never before been performed for this Client.

Dispatched. This Job will print on Route Sheets and also display on the Mobile App as part of the assigned Resource's schedule for the day.

Completed. This represents a completed Job on an **incomplete** invoice. You can mark the invoice as complete at any time; however, the next Job completed for the Client will create a new Invoice.

Canceled. This instance of the Job has been cancelled and will be removed from the Job List. You can see canceled jobs by using a filter.

Skipped. Skipped jobs ask for a reason for the skip, which will display under the job on the grid as a "Note to Office."

Invoiced. A job that has been completed and whose invoice is also **complete** will display this icon.

Locked Invoice. A locked invoice is one that has been emailed to the client or printed. Locking an invoice protects the invoice's integrity. You cannot move a locked invoice job to another day or re-dispatch it.

On Site. Assigned resources are clocked into the job. You must be using the Mobile App to see this feature.

Driving to Site. Resources are driving to the job site (en route). You must be using the Mobile App to see this feature.

Multi-Day Job (Scheduled). This job has been pinned as multi-day and has not yet been dispatched.

Multi-Day Job (Dispatched). This multi-day job has been dispatched and will appear on the Dispatch Board with this icon each day until it has been completed.

Toggle Timeslots off/on. Switch between viewing all slots per day or Resource, or only filled slots.

Show Scheduled Resources. Filters the screen to only Resources with scheduled Jobs .


Has Mobile Photos. There are photos uploaded from the Mobile App that are associated with this job. Click to view or delete.


Confirm Appointment: A call prior to the appointment is required to confirm this job.


Appointment Confirmed. A call has been made prior to the appointment for confirmation.


Low Priority.


High Priority.


Job Notes (Edit). This job currently has no Notes associated with it. Click the icon to add Notes.


Products (Edit). This job currently has no Products associated with it. Click the icon to add Products.


Overlapping Timeslot. This job's time allotment runs into the next Job scheduled.


Toggle Map. Opens/Closes the Map in the top portion of the screen.


Filter Jobs. Choose from among many ways to filter the screen.


Conflict (Waiting List Only). This Job has specific days upon which it cannot be scheduled. If you see this icon, you are on one of those days.