

WorkTrack Service Management One-at-a-time-dispatch Guide

July 9, 2008

This document is intended for WorkTrack Service Management users as an instructional guide on how to dispatch work orders one at a time to Service Techs.

Who should use One-at-a-time-dispatch?

Companies using mobile devices for their service techs for work order processing and prefer that techs only see one or a couple of work orders at a time on the phone.

An approach like this serves three main purposes:

1. It enables dispatchers to schedule up full days for techs in the field, and makes it easy for them to make changes as the day progresses without the tech knowing what is going on behind the scenes.
2. It makes the mobile application a little easier for the tech to work with since they are only looking at a small number of work orders on the handset at any given time.
3. It precludes the tech from “cherry picking” or stalling on “good” jobs to avoid getting to less desirable jobs later in the day since they are simply not aware of what else may be coming down the pike.

In the office this work flow pertains to the people who are actually taking calls and dispatching them to techs. These titles for these people vary by company size and structure but commonly include Customer Service Representative, Office Manager, Dispatcher, Maintenance Coordinator and Service Manager.

Procedure for One-at-a-time-dispatch

The process for one-at-a-time-dispatch is similar to the commonly demonstrated auto-dispatch method. Naming is not important here, so if these are not familiar you can ignore the names.

This section will show the process in diagram form for reference and follow with a step by step procedure a user can follow to get familiar with the workflow.

Description

The diagram below shows the concept of the flow from inbound call (or any work order creation) through the dispatch of the work order to the tech.

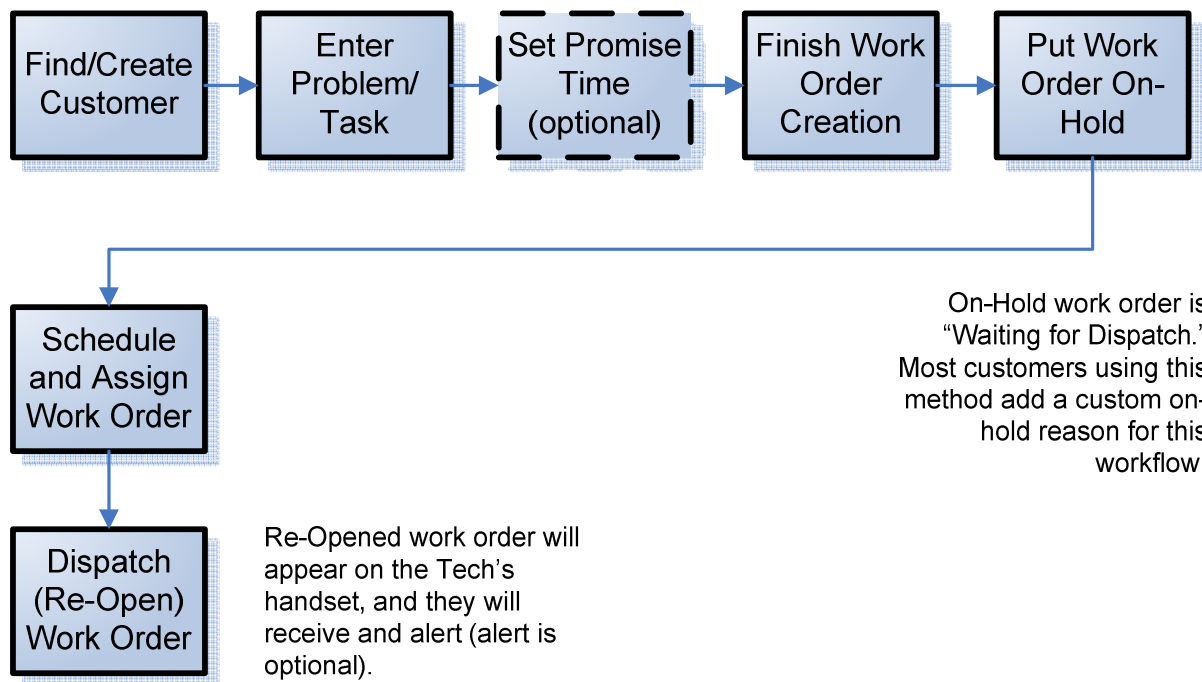


Figure 1. Flow Diagram for One-at-a-time-dispatch

The first four steps are covered in the Create New Work Order Wizard. The only change from the standard flow there is that the user creating the work order should not assign the work order at this time, even if they know who will do it.

The fastest and most reliable way to put the work order on-hold is to click the work order link in the feedback displayed at the top of the page immediately following work order creation. This will display the work order details where the set status button is available.

Once the work order is on-hold it will not appear on the mobile device and no alerts will be generated for the tech when the work order is reassigned or rescheduled. It will appear in yellow on the dispatch board (unless it is late or an emergency, which both show red) until you re-open it.

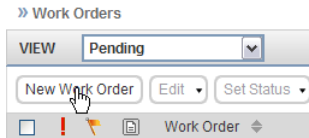
Scheduling can be done in all the same places in the application as it is now done for the on-hold work order. All on-hold work orders will appear in the on-hold view on the work orders tab. Any on hold work order that has an appointment time or ETA will also appear on the dispatch board.

Re-opening the work order will bring it back into the workflow so that it can be processed on the phone.

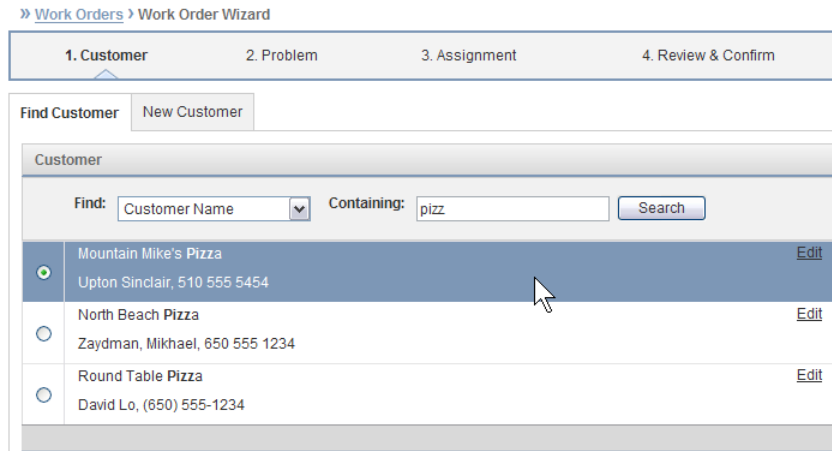
Step by Step Instructions

Find/Create Customer

1. Click the Create New Work Order Button

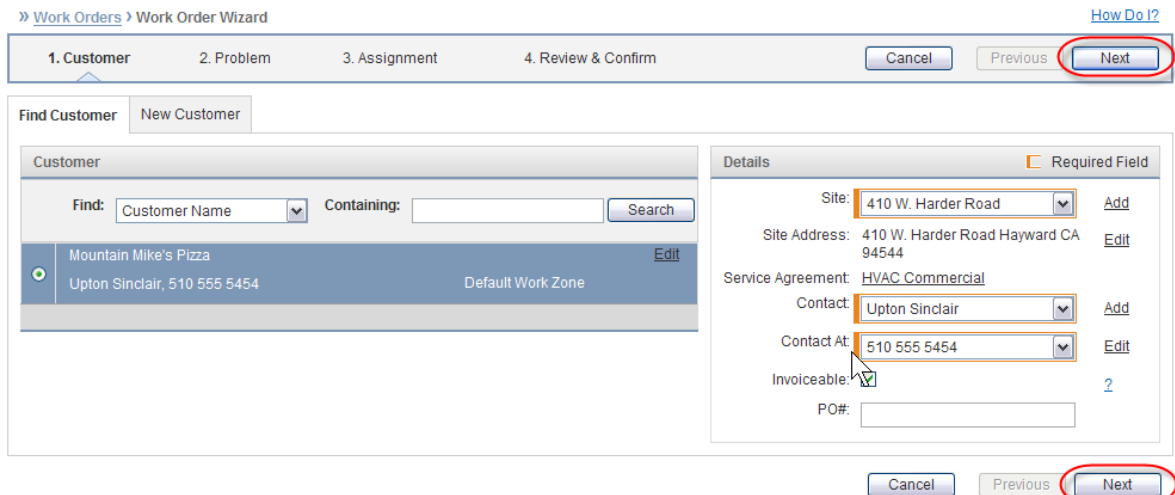


2. Search for and select a customer or create a new one as appropriate



3. Select site and complete other fields as you normally would.

4. Click Next



Enter Problem/Task

1. Pick a category and service from the list

» [Work Orders](#) > Work Order Wizard [How Do I?](#)

1. Customer 2. Problem 3. Assignment 4. Review & Confirm

New Work Order for Mountain Mike's Pizza Status: Unassigned

Work Order Type: Service

Category	Service	Description	Delete
<ul style="list-style-type: none">Common ProblemsInstallationScheduled MaintenanceAC-1Boiler 1	<ul style="list-style-type: none">NoisyNot workingOTHERThermostat not workingToo Hot		<input type="button" value="X"/>

2. Enter a description of the customer instructions for the tech (they will see this on the mobile device)

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1. Customer 2. Problem 3. Assignment 4. Review & Confirm

New Work Order for Mountain Mike's Pizza Status: Unassigned

Work Order Type: Service

Category	Service	Description	Delete
<ul style="list-style-type: none">Common ProblemsInstallationScheduled MaintenanceAC-1Boiler 1	<ul style="list-style-type: none">NoisyNot workingOTHERThermostat not workingToo Hot	The customer story goes here	<input type="button" value="X"/>

3. Click Next

Set Promise Time (Optional)

Note: It is important that you leave the work order Unassigned at this time.

1. Set date and time interval for the promise time and make any other changes necessary (priority, estimated duration).

» [Work Orders](#) > Work Order Wizard [How Do I?](#)

1. Customer 2. Problem 3. Assignment 4. Review & Confirm [Cancel](#) [Previous](#) [Next](#)

New Work Order for Mountain Mike's Pizza Status: Unassigned

Appointment Type:

Promised Arrival Time: To

Priority:

ETA: 2

Skill:

Due By:

Estimated Duration: Hr. Min.

[Show Map](#) Filter by Skill

Wednesday, 7/9/08

	10a	12p	2p	4p	6p
Unassigned					Mountain
Bill Boiler (0)					
Chuck Chiller (1)					

2. Click Next

Finish Work Order Creation

Review the details of the work order you just created and click Finish

» [Work Orders](#) > Work Order Wizard [How Do I?](#)

1. Customer 2. Problem 3. Assignment 4. Review & Confirm [Cancel](#) [Previous](#) [Next](#) [Finish](#)

New Work Order for Mountain Mike's Pizza Status: Unassigned

Customer: [edit](#)

Customer: [Mountain Mike's Pizza](#) Contact: Upton Sinclair
Site: [410 W. Harder Road](#) 510 555 5454
410 W. Harder Road Billing: Invoiceable
Hayward, CA 94544

Assignment: [edit](#)

Skill: Apprentice HVAC
Tech: -
Priority: Urgent
Work Duration: 1 hrs
Appointment Type: Scheduled
Promised Arrival Time: 7/9/2008 2:30 PM

Problem: [edit](#)

Common Problems Thermostat not working
The customer story goes here

Notes: [add](#)

There are no notes

On Finish you will see feedback on the top of the screen telling you that the work order has been created.

» [Work Orders](#) [How Do I?](#)

! Your Work Order [wo-0413](#) for Mountain Mike's Pizza has been created

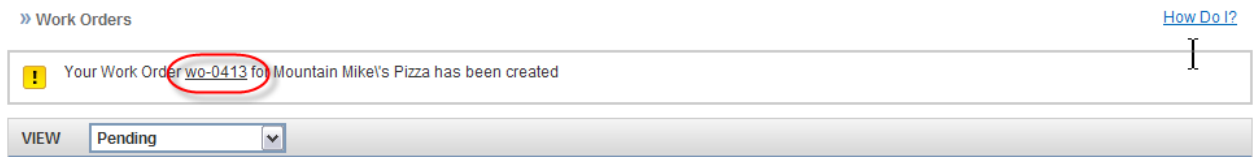
VIEW

Put Work Order On-Hold

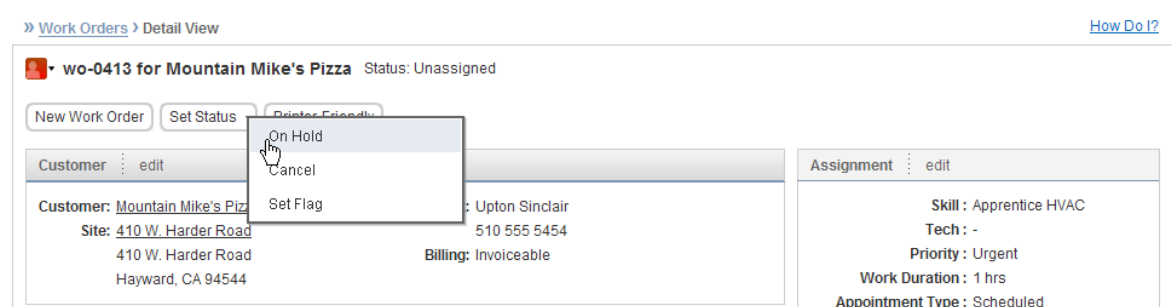
A work order can be put on-hold from any place where you change status. In this model, the quickest way to access the work order to change the status is by clicking through on the feedback immediately following the work order creation as shown above. This is the best way to do it, because you will always be able to find the work order that you just created (regardless of where you were when you hit the Create New Work Order button) and it will be easiest to remember.

The steps are as follows:

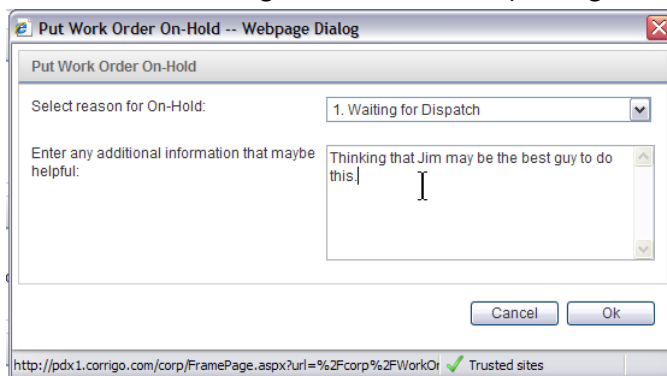
1. Navigate to the work order from the feedback



2. On the work order details screen click the Status button and select On-Hold



3. On the On-Hold dialog choose the reason (waiting for dispatch) and click OK



Any comment entered here will flow through to the notes log for this work order.

Note: You can get to the On Hold work orders by navigating to On Hold view in the work order list.

Schedule and Assign the Work Order

You can schedule and assign the work order in whatever way you are most comfortable. The preferred method is to use the Edit Assignment page accessible by clicking through on a work order from the

dispatch board, clicking the edit link on the assignment panel on the work order details or select Edit Assignment item from the pop-up menu available from any work order icon.

» Work Orders > Detail View > Edit Assignment [How Do I?](#)

1. Customer 2. Problem 3. Assignment 4. Review & Confirm

wo-0413 for Mountain Mike's Pizza Status: On Hold

Appointment Type:

Priority:

ETA:

Promised Arrival Time: To

Skill:

Due By:

Estimated Duration: Hr. Min.

Filter by Skill

Wednesday, 7/9/08

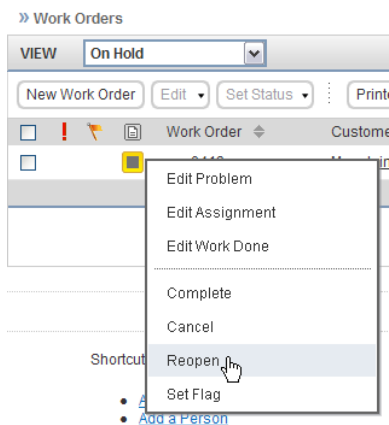
	10a	12p	2p	4p	6p
Unassigned					
Bill Boiler (0)					
Chuck Chiller (1)					
Inv Installer (0)					
Joe Tech Sample (1)					

Since the work order is on-hold it is not yet visible in the field on the mobile device. You can set up and change schedules as you see fit without the tech ever being aware of the changes.

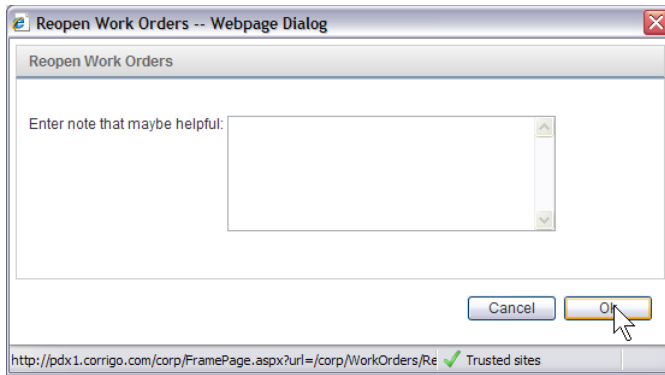
Dispatch the Work Order

To dispatch the work order simply re-open it. You can re-open the work order from the status button on the work order details page or from the pop up menu next to any work order icon. When you choose re-open you will be offered the opportunity to put in a comment which will flow through to the work order note log.

1. Choose Re-Open



2. Click OK on the Dialog Box

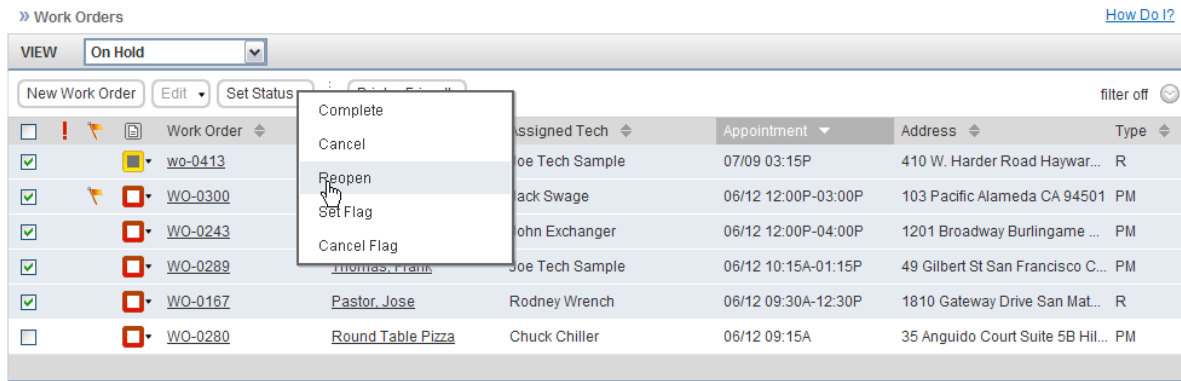


The work order will now be sent to the phone of the assigned tech.

Other Tips

Bulk Dispatch

You can dispatch multiple work orders at once by selecting them from the On-Hold list and choosing ReOpen from the Set Status Menu.



List Filtering

When using a one-at-a-time-dispatch process you may want to filter the pending list so that it does not include On-Hold work orders. This will, in effect, make this the list of work orders that have been dispatched to the field for easy tracking.

» Work Orders [How Do I?](#)

VIEW Pending

New Work Order Edit Set Status Printer-Friendly filter on

clear all filters Last Action Date: Off Appointment Date: Off Status: On

Work Order	Customer	Assigned Tech	Appointment	Type
WO-0186	Luiqi's Italian Restaurant	Rick Ratchet	06/12 08:45A-11:45A	F
WO-0221	Miniatti, Mike	John Exchanger	06/12 08:30A-11:30A	F
WO-0338	House Of Bagels	Harvey Hammer	06/12 08:00A	PM
WO-0149	Luiqi's Italian Restaurant	Jack Swage	06/12 08:00A-11:00A	R
WO-0214	House Of Bagels	Rick Ratchet	06/12 07:15A-10:15A	F

Off
 En Route
 On Hold
 Paused
 Picked up
 Waiting for pickup
 Work started

Waiting for Pickup Picked Up En Route Work Started Paused On Hold

Questions?

Corrigo support can be reached from 5 AM to 5 PM Pacific time Monday through Friday toll free at **1-877-701-8326**.

You can also contact your sales consultant directly for further assistance.