

Fastrax  ***Service Software Suite***

FASTRAX BASICS - A TRAINING GUIDE



Dispatch & Contract Menu Review

Primary users: CSRs & DSRs

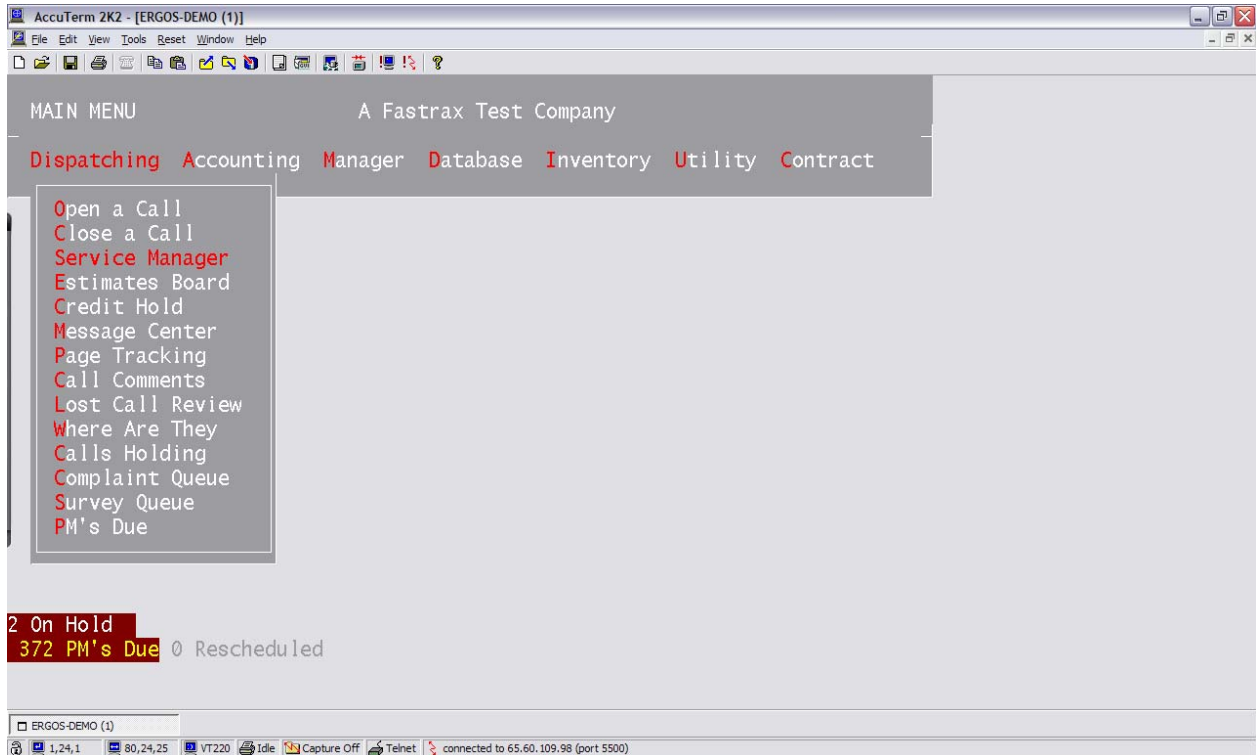
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FASTRAX BASICS®

Service Dispatch Module



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Fastrax© Basics



Hi, I am your training instructor from Ergos Software, Inc. To obtain an understanding of navigation and use of Fastrax see “Fastrax Basics – Basic Functionality Manual”. The Dispatch Module includes many great features to assist call takers and dispatchers in completing each task faster and more accurately. Remember that Ergos Software, Inc. has a live support team available to assist you with your Fastrax Software System. If at any time you have any questions or need any additional help with your Fastrax software package, just give me a call at 888-352-3529 or visit the Ergos Software website at www.ergos-software.com. Let’s begin learning how to access and use your Fastrax Dispatch Module.

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FASTRAX

SERVICE DISPATCH

Dispatch Menu Options

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 - 8. Call Comments**
 - 9. Lost Call Review**
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 - 11. Calls Holding**
 - 12. Complaint Queue**
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-

Description of Menu Options

1. OPEN A CALL

Enter a new call or review an existing call from this screen. To enter a new call, bypass the incident prompt and fill in the customer information. Once the call is filed, an **Incident Number** will be generated by the system. This will be the number used to track the call throughout the system. To review an existing call, enter the incident number at the **Incident** prompt, or select **F2** to look-up the call based on one of several query parameters.

2. CLOSE A CALL

When a technician is finished with a service call, the call must be closed before he can be dispatched to a new call. When a call is ready to be closed, you may enter either the incident number or the work order number. You will be prompted for a breakdown of any charges, any parts that were used and the method of payment that was used. Since this is usually done on the phone with a technician, you may opt for a "quick close" in which case you need only enter the total dollar amount to close the call. The rest of the information can be entered when the paperwork comes in to the office for invoice approval.

3. SERVICE MANAGER

The **Service Manager** is the *Fastrax* primary dispatch control center. In addition to providing **Assignment** and **Dispatch** functions, the Service Manager enables you to list service calls by **Sector**, **Technician**, call **Status** and **Date**. Additionally, selected calls can be sorted by dollar **Value**, **Zone**, the **Technician** assigned, **Date** and **Time**, call **Status** and **Problem Code**. The Service Manager also provides functions to **View**, **Open**, **Reschedule** and change the **Status** of service calls.

4. ESTIMATES BOARD

The **Estimates Board** is for managing estimates logged in *Fastrax*. Estimates are logged through the Close A Call screen by selecting E for estimate and entering totals, tasks and descriptions for your estimate. Estimates that are not converted to service calls will display in this queue for scheduling or they can be canceled once a customer has declined the work.

5. CREDIT HOLD

When a customer calls for the first time and requests to be billed for the job, they will be placed on credit hold until they are given a credit limit. The **Credit Hold** screen enables you to enter a credit limit for the customer. The Credit Hold screen is also used to enter the customer's address and credit information. The number of customers who are on "credit hold" waiting for approval will flash on the main screen until their credit has been either approved or denied.

6. MESSAGE CENTER

The message center allows you to send unlimited electronic mail to any employee, a group of employees or all employees in the company. If a technician has any mail in his message queue he cannot be dispatched to his next job until he receives it. This feature ensures that the technician will receive all job-related messages prior to being dispatched. If an office employee has mail, the number of messages in his queue will flash on the Main Menu when he logs in.

7. PAGE TRACKING

The **Page Tracking** feature is the technician communication center of the dispatch module. When you need to get in contact with a technician, enter his employee number or name at the **Employee** prompt to list all phone numbers on file for him. If Alpha Paging is on the system, you will be able to send customer information to the technician by entering the call incident number at the **Call ID** prompt. You can also send a free-form message to the technician by selecting **Enter** to by-pass the **Incident** field and then entering your message. This screen also keeps a history of pages to the technician and the date and time he was paged. You also use the **Page Tracking** option to set a technician's status as unavailable or to hold dispatch.

8. CALL COMMENTS

The Call Comments feature is used to enter messages, call history or customer complaints regarding a client or specific service call. An unlimited number of comments may be entered for each incident number. The number of comments entered for each incident will be displayed at the top of the screen when an incident is reviewed in the **Open a Call** screen.

9. LOST CALL REVIEW

When a call is lost or cancelled, the dispatcher must give a reason why it is being cancelled. It will then be placed in the "lost call queue" for review. A list of lost calls will be displayed along with customer information, and the reason for canceling. This gives you the opportunity to resolve the reason for the cancellation and get the customers business back for your company.

10. WHERE ARE THEY

The **Where Are They** option is an information screen used to determine the location of your technicians by **Sector**, their **Available/Unavailable** status, if they are dispatched and, if dispatched, the date and time of dispatch. The **Where Are They** screen also enables you to assign a technician to a service call as a helper.

11. CALLS HOLDING

The **Fastrax** system enables you to suspend data entry and put the customer on hold prior to completing the entry of all the customer information. This feature saves the incomplete data entry screen while you address other issues requiring data access in the **Fastrax** system. In the event that you need to put a customer on hold before you have entered all the customer information, select the **F11** function key to save the incomplete call. The system will request verification and will prompt you for the line number the call is holding on. Select the **Calls Holding** option from the Dispatch menu to view and access all calls currently holding.

13. COMPLAINT QUEUE

When a complaint is entered, it must be given to someone to handle or resolve. When that person logs onto the system the number of complaints they need to resolve will flash on the main program screen. The manager can enter their employee number in this screen to get a list of customers who have lodged a formal complaint against a job, or against a technician that is under their management.

14. SURVEY QUEUE

If surveys are done through the system, this screen will list all the calls selected to be surveyed. Calls are placed in the survey queue as they meet the criteria of different types of surveys set up by your company. The number of surveys needing to be done either by you or your employee type will flash on the Main Menu.

16. PM's DUE

Select this option to review the number of preventive maintenance contracts that are due to be serviced.

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1. Open a Call

Select the **Open a Call** option to display the **Open/Review Service Call** screen and open a new service call or review service call history.

1.1 Entering New Customer Service Call Information – To enter service call information for a new customer, select the **Open a Call** option found on the **Dispatch** Menu (or select option o –open from the service manager board. Bypass the incident number prompt by selecting **Enter**, an incident number will be automatically assigned when you file the call. Enter the customer information by following the order of the screen customer information prompts (The order that the screen prompts the user for information can be changed to fit your company's needs).

1. Problem Code- By Following the instructions located at the bottom of the screen you will notice that you press F2 or click search to access your problem code option list. Select the option which best describes your problem code, if another list appears simply choose your selection from that sub categorized list.

2. Comments – This is a optional free-form field to include any comments the customer may have, or to describe the problem in detail for the technician. When all of your notes are entered you must press F11 or click File to close the notes window and continue entering your call information.

3. Contact Phone # Entry- List all applicable contact numbers applicable to your service call.

- **TYPE-** Press F2 for an options list, it is mandatory the first phone number entry be for 'Site Phone'.
- **PHONE-** Enter the phone # in straight text (ex. 8883523529) the software will automatically format your entry.
Fastrax Auto formats many text entry fields including dollars, dates, phone numbers, etc.
- **EXT-** Enter the extension # or leave this field blank if it is not applicable.
- **RELATION-** Press F2 to select a relation code from the list.
- **NAME-** Enter the last name and then enter the first name for the customer.

When you press enter, the system will take you to the next s-sequence line to enter another phone number. If you want to enter a phone number press F2 to select the type of phone number you are logging & then complete the following information. If you do not want to enter another phone number, press enter to skip to the Address Field.

Site Phone – Enter the phone number of the site where the work is to take place. If the Site Phone is the same as the Call Back Phone number, select **Enter** to default to the Call Back Phone number. If this is a previous customer, the address information will load automatically.

4. **Address** – Enter the address of the site where the work is to be performed. Be certain of the correct spelling to enable future customer look-up with the **Find a Customer** query function.
5. **Zip** - When you enter a zip code, the system automatically finds that code and inserts the city & state. If you enter a zip code that does not exist, a new screen will open to create that zip code. Enter the necessary information for the zip code & F11 to file the zip code.
6. **X Street** – Enter the nearest cross street(s) of the site. This is a mandatory field that can be sent to the technician’s cell phone to assist him in finding the job site. **Note:** The call information that is sent to the technician’s pager is selected with the **Background Control** screen in the **Database Security** menu.
7. **Property Code** – Enter the Property Code that describes the type of property the technician will be dispatched to (Example: Single residence, apartment, restaurant, commercial building, etc.). Select **F2** for a list of Property Codes available in your system. Property Codes are entered and defined in the **Codes** sub menu in the main **Database** menu.
8. **Priority Code** – Enter the Priority Code that describes the urgency of the job. Jobs with a higher priority will be listed first in the assignment queue. Select **F2** for a list of Priority Codes available in your system. Priority Codes are entered and defined in the **Codes** sub menu in the main **Database** menu.
9. **Ad Page** – If a customer is calling because they have heard about your company through specific advertising, such as the Yellow Pages, enter the page number of the ad, or the code for the advertising medium i.e., billboard, radio, etc. Select **F2** for a list of advertising codes defined in your system. This information is used to determine which ads are profitable in specific areas. Advertisement data is entered through the **Advertisement** sub menu located in the main **Database** menu.
10. **Email** – Enter the customers email address in valid format (email@network.com). This will be used to email invoices, statements, estimates, notifications and specials.
11. **Rate** – This is the rate to be charged per half-hour. The default rate defined in your system will be displayed, but can be changed to accommodate unique situations. If your company changes rates at different times of the day, the system will display the appropriate rate according to the time a call is opened. Time of day dependant rates are defined in the **Priority Codes** screen on the **Database Codes** menu.
12. **Terms** – Enter a **Terms Code** that best describes the way the customer requests to pay for service. Select **F2** for a list of payment Term Codes defined in your system. If billing is requested, the customer will be put on credit hold until credit terms are defined. If a credit card is to be used, you will then be prompted for the card number. The default Terms Code is defined in the **Main Control** screen on the **Database Security** menu.

- 13. Bill to #** – This Customer Number field is used for billing customers only. If you are entering information for a new customer, you can select **Enter** to bypass this field. The system will generate a customer number when billing terms are requested on the initial call and a credit limit is issued. If a billing customer has multiple sites that need to be serviced, this is the number that will link all sites to a single customer for billing purposes.
- 14. Credit Card #** - A credit card number can be entered in this field to place a credit card on file for a customer.
- 15. Map Page #** - After looking up the job information in a map book the map page # can be logged into this field to be text messaged to the technician.
- 16. Age-** If you are opening a service call to service a large piece of equipment, the age of the equipment can be listed in years.

Scheduled – **Scheduled** field is a combination of three fields used together to schedule the timing of service appointments. When you enter the service call information, the **Scheduled** field is bypassed and automatically defaults to the current date and time. Enter the preferred appointment time in the **Time** field. You can also enter a time range such as 12-2 to indicate the optimal time range in which a customer can receive service. The time entered in the **Time** field will over ride the time in the Scheduled field and appear in the call assignment queue. If you need to reschedule the call for a later date, change the date in the **Scheduled** field by accessing the call information in the **Open/Review Service Call** screen, and select the letter **S** to activate the **(S)cheduled** option on the lower screen menu. This will place the cursor in the Scheduled field, change the date and time for the new appointment and select **F11** or the letter **F** to **(F)ile** all changes. The scheduled field can also be used to enter the estimated time required for the service call. To enter a time estimate, after all the customer information has been entered, select the **(S)cheduled** option from the lower screen menu. Select **Enter** twice to bypass the Date and Time in the Scheduled field and enter the time estimate

Sector – The **Sector Number** or designation corresponding to the call location is automatically entered by the system. Sectors are used to sub-divide your service area into smaller more manageable geographic areas, and are very useful for locating and managing call information. Sectors are defined in the **Updates** option of the main **Database** menu.

Once all the necessary information is entered, select the **F11** function key to file the call. If there are multiple companies dispatching from the same site, you will be prompted for the company this call belongs to. Enter the **Company Code** at the **Company** prompt, or select the **F2** function key for a list of companies set up in your database, select **F11** again to file the call and company information. The system will then assign an **Incident Number**, which will be used to

track the call throughout the system. The service call is now available for **Assignment** and **Dispatch**.

1.2 Entering Repeat Customer Information – The *Fastrax* system provides several search methods to enable you to find repeat customer information and expedite the opening of a new service call. To enter new service call information for a repeat customer that you are not in direct telephone contact with, select the **Open a Call** option and enter the customer's name in the **Incident** field, or select **F2** to bring up the **Customer Call Locator** function. The Customer Call Locator will allow you to find the customer information using several search parameters. When using either of the above search methods, upon entering your search parameter, the system will bring up a list of “best fit” search results. Select the sequence number of the appropriate customer and **Enter**. This procedure is valuable in cases where a service request is conveyed to you indirectly with incomplete information, and you are unable to contact the customer.

Alternatively, if you are speaking with a repeat customer on the telephone, you can begin with the **New Customer Service Call** procedure by selecting **Enter** to bypass the **Incident** field, enter the **Problem Code** and **Comments**, and then enter the customer's **Telephone** number to load the remaining customer information.

Either of the above procedures will automatically load the customer information into the **Open/Review Service Call** screen. Upon verification that the customer personal and demographic information is correct, select the letter **O** to (**O**pen a new service call, update and **Enter** all fields that pertain to the new service call such as **Problem Code**, **Priority Code**, **Terms** and **Scheduling info**, select (**F**)ile or **F11** to file the call.

1.3 Reviewing Customer History – The *Fastrax* **Customer Call Locator** function also provides a service call history review feature. When you enter a previous customer's name, or **F2** at the **Open/Review Service Call** screen **Incident** prompt, and the system displays the list of best fit customer search results, select the letter **A** and the customer sequence number to activate the (**A**)ll calls option from the lower screen menu. The system will display all service calls previously performed at this customer site for your review. The information in the (**A**)ll Calls screen includes **Incident Number**, the **Company** that performed the work (in the case of multiple companies being run from the same site), the call **Status**, the **Revenue** on closed or approved calls, the **Work Order** number (**W/O**) and the **Employee** who handled the service call. If you wish to view further details of prior service calls, select the sequence number of the call from the (**A**)ll Calls list, this will display the customer demographics and service call details in the **Open/Review Service Call** screen.

Alternatively, if you have already loaded previous customer information in the **Open/Review Service Call** screen by direct data entry, or by selecting the customer sequence number from a list of search results, you can select and **Enter** the letter **H** to access the (**H**)istory option from the lower **Open/Review Service Call** screen menu to view the customer service history. Selecting the call sequence number from the resultant list will load the previous call information into the **Open/Review Service Call** screen for review.

Lower menu options on the Open/Review Service Call screen:

- **(CR)** for a new call – Select the **Enter** or **Carriage Return** key to begin data entry for a new service call.
- **(N)**ext – When viewing call information in the **Open/Review Service Call** screen, enter the letter **N** in the **Rep** field to enter new call information, or to look up information on a previously entered service call.
- **(O)**pen – When a repeat customer calls for service, you can enter the customer’s name or address, or select **F2** at the Incident prompt to bring up existing information on the customer. At this point you can select **(O)pen**, to open the new call and enter information regarding the current service request.
- **(#)** to Change – **Enter** the number of the line item you wish to edit in the **Rep** field located in the lower left hand corner of the **Open/Review Service Call** screen. **Note:** When using the **(O)pen** function to open a new service call for a repeat customer, instead of selecting **Enter** to cycle through each of the screen prompts, you can select **F3** to bring up the lower screen menu and use the **(#) to Change** function to go directly to those fields you need to change. In many cases, the only fields you will need to update for a repeat customer are the **Problem Code, Priority Code, Terms** and **Time** fields.
- **(F)**ile – Files the service call information, this command is used instead of the **F11** save command.
- **(S)**chedule – Select this option to enter or change the service call scheduled date, time and estimated number of hours required to perform the requested service.
- **(V)**iew Schedule – Select this option to view the schedule for all technicians in the current sector. This schedule will display how many calls are allowed for each technician type and schedule time code vs. how many calls are already booked for each technician type and schedule time code.
- **(A)**udit – Select the audit function to display a complete history of all actions that have taken place for a service call along with the employee responsible for each action.
- **(H)**istory – Select the history command to display a history of all service calls performed by your company at this customer site.

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2. Assignment

After a call has been entered into the system, you may choose to assign the call to a technician. Calls can be displayed and assigned individually by **Incident Number**, or you can bring up a list of calls for assignment by **Sector** (location), or by **Problem Code**. The assignment process is an aid in helping you to set up each technician's dispatch queue ahead of time and to make the dispatching process more efficient. However, the assignment process is optional and is not required for dispatching a technician to a service call.

2.1 Individual Call Assignment – To display and assign an individual call in the assignment screen, select **Assignment** from the **Dispatching** menu and enter the call **Incident Number** at the **Incident** prompt. If the incident number is not known, you can search for the call by entering either the customer's name, address or telephone number at the **Incident** prompt, or by selecting **F2** to perform a customer search with the **Customer Call Locator**. After you have entered the customer information with either of the above query methods, the system will display a list of "best fit" calls that match your search criteria, enter the sequence number of the call you wish to assign. The customer information and a list of technicians who work in the area and who are qualified to do the job will be displayed (The technician selection by job location and qualification is determined by the **Problem Code** entered when the call was taken and the **Sector** the service call is located in). Select and **Enter** the sequence number of the technician you are assigning the call to. The call is now assigned to that technician. At this point, the call will still appear in the Assignment queue with the technician's name in the **Assigned** field until it is dispatched. The call will also be listed in the technician's dispatch queue in **Assigned** status.

After entering the technician's sequence number, the technician's **Page Tracking** screen will come up. The Page Tracking screen enables you to enter or deliver any messages for the technician with the **(P)**age option, to place the technician on **(U)**navailable status, to **(H)**old Dispatch for a technician or to record any **(C)**omplaints lodged against the service call. The **(U)**navailable and **(H)**old Dispatch options are used to place a technician in "holding status" until important job information, or other company communications take place. The **Page Tracking** screen also keeps a record of all pages that have been sent to a technician, and a record of all **Hold Dispatch** events. If you do not need any of the Page Tracking options, select **F3** to go back to the main menu. **Note:** The **Page Tracking** screen and all associated functions can also be accessed from the **Dispatching** main menu.

The technician queue will display the following information:

- The technician's employee number and name.
- The priority of the job location sector, relative to the sector(s) the technician typically works in, i.e., if a technician works in Los Angeles County, a job in this sector would be given a priority one. If the job is located in a neighboring county, the **sector priority** may be two. The sector priority level for each technician is set in the **Assigned Sectors** section of the **Employee Update** screen found in the **Database Updates** menu.
- The city and zip code of the technician's current location.

- Current status of the technician (available, dispatched, unavailable).
- Number of jobs in the technician's queue scheduled for today.
- The ratio of the technician's average closing dollar amount and the technician's closing percentage for the selected job. This ratio can be compared to the **Company Average** closing amount and percentage located in the top section of the screen. This feature allows you to select the technician with the best "track record" for a specific type of service problem.
- Total number of jobs in the technician's queue for his/her allowable time period. The number of days a technician can keep a job in his queue is defined with the **Main Control** option on the **Database Security** menu.

2.2 Call Reassignment – If you need to change a service call assignment to a different technician, select the **Dispatch a Call** option from the **Dispatching** menu, enter the technician's employee number or name in the **Employee** field of the **Dispatch** screen. The system will display a list of all calls currently assigned to that technician. Select the letter **A** and the number of the call you wish to unassign (the Un(**A#**)ssign option from the lower screen menu). This procedure removes the call from the technician's dispatch queue and places the call in unassigned status in the **Assignment** queue.

Lower menu options on the Assignment screen:

- **Enter Seq (#)** – Enter the number of the service call you wish to assign in the Rep field.
- **(N)ext / (B)ack Sector** – Select these options to scroll through the different sectors in your service area.
- **(CR)** to Page Forward – Select the enter key (carriage return) to view the next page of service calls requiring assignment. Enter the minus symbol (-) to view the previous page of service calls.
- **F3** – Select the **F3** function key to exit the **Assignment** screen.

Lower menu options on the technician list:

- **Enter Seq (#)** – Enter the sequence number in the **Rep** field of the technician you are assigning a call to. The service call will remain in the assignment queue and in the technician's dispatch queue until dispatched or unassigned.
- **(S)chedule** – Select this option to view a schedule for all technicians in the current sector. The time slots that correspond to previously scheduled calls will be marked with an asterisk.

- **(P#)**age – To page a technician, enter the letter **P** and the sequence number of the technician. If you are sending specific call information, enter the call **Incident Number** at the **Incident** prompt. If you are sending a free form message, select **Enter** to bypass the **Incident** prompt, type your message and **Enter**.
- **F3** – Select the **F3** function key to exit the **Technician** queue.

Lower menu options on the Page Tracking Screen:

- **(N)**ext Employee – Select this option to view information on another employee. After you select and **Enter** the letter **N**, the system will remove the previous employees information and prompt you for the next employee name or employee number.
- **(P)**age – Select the Page option to send service call information, or a free form message to the technician over his Alpha pager. To send service call information, enter the call **Incident** number at the **Incident** prompt. To send a free form message, select **Enter** to bypass the **Incident** prompt, type your message and select **Enter**.
- **(U)**navailable – When a technician is temporarily unavailable for assignment or dispatch, due to appointments or other factors, use this option to place him in **Unavailable status**. After selecting the **(U)**navailable option, the system will prompt you for the reason the technician has been put in Unavailable status, this reason can then be referenced throughout the system. Once the technician has been placed in Unavailable status, the **(A)**vailable option will appear in the lower screen menu, select this option to remove the technician from Unavailable status. **Note:** When a technician has been placed in **Unavailable status**, he can still be assigned and dispatched to service calls, although he will be listed in the technician queue as unavailable **(N/A)** and the system will inform you of the Unavailable status when you assign the call. This feature provides assignment and dispatch flexibility for technicians who are unavailable for short periods of time, but can accept assignment at a later time during the day.
- **(C)**omplaints – Select this option to document any customer complaints against a technician or service call. Selecting the **(C)**omplaint option will bring up the **Employee/Incident Complaints** screen which enables you to document the complaint and assign the responsibility for the complaint resolution to the appropriate supervisory staff. Please refer to the section on **Page Tracking** (Section 8) and the **Complaint Queue** (Section 13) in this chapter of the *Fastrax* manual for a complete discussion of documenting and resolving customer complaints.
- **(H)**old Dispatch – If a situation arises in which you do not want a technician dispatched, select the **(H)**old Dispatch option. This will place the technician in **Hold status** until the impending issue is resolved. After you place a technician on hold, the **(H)**old Dispatch option will change to **(R)**elease Dispatch, select this option to remove the technician from Hold status. While the technician is in Hold status, you can assign service calls to him, but the dispatch option will not be available in his Dispatch queue until he has been **Released** from **Hold status**. The Page Tracking screen will keep a record of all Hold and Release dispatch events for each technician.

- **F3** – Select the **F3** function key to exit the **Page Tracking** screen.

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3. Dispatch a Call

When a technician calls in for his next job, go to the **Dispatch** screen by selecting **Dispatch a Call** from the **Dispatch** menu. Enter the technician’s employee number or name at the **Employee** prompt. **Note:** In most cases, entering the technician’s full name will load his dispatch information directly into the **Dispatch** screen. However, if you do not enter the technician’s full name, or if there are techs with similar names, the system will display a list of “best fit” search results, or the closest matches to the name. In this case, select the sequence number of the technician’s name you wish to dispatch and press **Enter**. The system will display the technician’s name, employee number, the sectors he works in, zip code information, all calls currently assigned to the technician, any call that is currently dispatched and any calls that have been put on hold by the technician. If there are no calls in his dispatch queue, you have the option to go to either the **(S)**ector Pool or the **(Z)**ip Code Pool and dispatch a call directly from either pool. (Note: If no calls have been **Assigned** to a technician, and the technician is not currently dispatched, there will be no calls in his/her dispatch queue.) If there are calls in the dispatch queue, the screen will list the following information:

- Incident number of the call
- Company code the job is under
- Customer city and name (The customer name only is used after the call is dispatched).
- Scheduled date and time
- Dispatch date and time
- Problem code
- Priority code
- Current status of the job

3.1 Standard Dispatch Procedure (Dispatch with the Assignment Option)

To dispatch a technician to a service call, select the **Dispatch a Call** option from the **Dispatching** menu and enter the technician’s name or employee number. Select the call you want to dispatch from the currently assigned calls in his dispatch queue by entering the letter **D**

and the sequence number of the call ((**D#**)ispatch from lower screen menu). You will then be given the options to (**D**)ispatch or (**R**)efuse the call. Select **D** to dispatch. The system will now prompt you for a work order number and, if the **Mileage-Tracking** option is turned on in your system, you will be prompted for the technician's current truck mileage. Be certain to get the work order and truck mileage information from the technician at the time he calls in to avoid the time delay of calling him back. Once you enter the work order number and, if applicable, his truck mileage, the system will prompt you to enter the **ETA**, enter the time the technician expects to arrive at the service call. If alpha paging is installed, the system will give you the option of sending the call to the technician's pager, enter yes to send the call information directly to the technician. At this point the technician has been dispatched and the system will shift to the **Open/Review Service Call** screen allowing you to review and, if required, relay call information to the technician while he is in radio/telephone contact.

3.2 Employee Messages and Hold Dispatch Status

If there are assigned calls waiting for dispatch in an available technician's queue, and the (**D#**)ispatch option is unavailable, in most cases it is because the technician has undelivered messages. If the technician has undelivered messages, the **Messages** flag will appear in the upper right hand area of the **Dispatch** screen. The *Fastrax* system will not allow a technician to be dispatched until all messages have been evaluated and/or delivered by the dispatcher. This feature prevents the technician from missing important job related information. If the **Messages** flag indicate that the technician has an undelivered message, note the number of messages indicated, and select the letter **M** for the (**M**)ail option to bring up the **Electronic Message System**. Select the letter **L** to (**L**)ist the message(s) and **Enter** the **Sequence** number of the message(s) you wish to view (The **Seq (#)** option from lower screen menu). Once you have evaluated the message(s) and have **Delivered**, **Saved** to history or **Deleted** them, select the **F3** function key to return to the **Dispatch** screen and proceed with the dispatch procedure (See the following section on the **Message Center** for a complete discussion of this feature). Note: The system will continue to **Hold Dispatch** for message delivery until the message is **Deleted** or **Saved** to history.

If there are no messages and the (**D#**)ispatch option is still unavailable, the technician has been placed on **Hold Dispatch** status. To verify that a technician is on **Hold Dispatch** status, select the **Page Tracking** option from the **Dispatching** menu and enter the technician's name or employee number. The current hold status for the technician will be displayed in the right hand **Dispatch Restricted** column of the **Employee Page Tracking** screen. The **Dispatch Restricted** column will list the date and time the technician was placed on Hold Dispatch status and the employee who initiated the hold status.

3.3 Dispatch Refusal

If the technician refuses to accept a service call, follow the initial dispatch sequence by entering the letter **D** and the call number. Select the letter **R** to (**R**)efuse the call. The system will now prompt you for a **Refusal Code** to document the reason the call was refused. Select the **F2** function key for a list of refusal codes defined in your system.

3.4 Dispatch Traveling Option

The **Traveling** option is used to record technician travel time between service calls. To initiate the **Traveling** dispatch option, select the **Dispatch a Call** option from the **Dispatching** menu at the time the technician calls in for his next assignment. Select the letter **T** and the service call sequence number (**(T#)raveling** from lower screen menu) and enter the technician's next work order number and, if applicable, his truck mileage. This procedure records the technician's start time. When the technician arrives at the job site, he is required to call the dispatcher and indicate his time of arrival. At the time of his call, bring up his dispatch queue and select the letter **D** and the call sequence number to **(D#)ispatch** the call. Enter the technician's arrival time at the **ETA** prompt. This procedure will record the technician's arrival time, or end time. Selecting the Travel option puts a time stamp in the service call audit trail indicating the time the technician was dispatched and the time he arrived at the job site.

3.5 Dispatching from the Sector/Zip Code Pools (dispatching without assignment)

To dispatch a technician with no currently assigned calls from the **Sector** or **Zip Code** pools, or to circumvent the assignment process and dispatch a call directly, select the **Dispatch a Call** option from the **Dispatching** menu. Enter the technician's employee number or name and select either **(S)ector** Pool or **(Z)ip** Pool from the lower menu. **Note:** If the technician has previously assigned calls in his queue, these options will not be available. Upon entering the desired **Sector** or **Zip Code**, the system will list all calls in the selected pool and give you the option to **(T)ravel**, **(D)ispatch**, or **(R)efuse** the call. If there are no calls in the selected Sector or Zip Code pool, the system will prompt you for another **(S)ector** or **(Z)ip** Code.

From this point, the Dispatch procedure is the same as the previously described procedures for the **Travel**, **Dispatch** and **Refuse** options, with one exception, if you select **Travel** or **Dispatch**, the system will dispatch the first call in the dispatch queue. When dispatching a technician directly from the Sector or Zip Code pools, the first call is automatically selected for dispatch because the system lists calls in the order of the technician's best dollar value/close percentage ratio (**Average Ratio**). Therefore, if there are several calls in the dispatch queue and you wish to dispatch a call after the first call in the sequence, you must select the **Refuse** option and give a **Refusal Code** for all calls preceding the call selected. Select **F2** for a list of **Refusal Codes**. **Note:** When the **Assignment** option is used, the technician **Average Ratio** is displayed for all available techs in the technician queue when a call is selected for assignment. This feature enables you to select the best technician for a specific job by comparison to the **Company Average Ratio** that appears at the top of the Assignment screen.

3.6 Unassign, Undispatch, Redispatch and Change Status Options

Unassigning a call – When you need to unassign a service call that has been previously assigned to a tech, select the **Dispatch a Call** option from the **Dispatching** menu. Enter the employee number or name of the technician you are unassigning the call from, **Enter** the letter **A** and the call sequence number (**Un(A#)ssign** from the lower screen menu). This procedure removes the call from the technician's dispatch queue and places the call in unassigned status in the **Assignment** queue.

Undispatching/Redispatching a call – If the technician cannot complete a job due to unavailability of parts, or other factors, you can **Undispatch** him from the call. This procedure will put the call in hold status and allow the technician to be dispatched to other service calls. The incomplete service call will remain in the technician's dispatch queue in hold status until it can be completed. **Note:** The *Fastrax* system will allow a technician to be dispatched to only one call at a time, therefore, in cases where a call needs to be put on hold, the technician **must** be **Undispatched** before he can be given additional service calls.

To **Undispatch** a technician, select **Dispatch a Call** from the **Dispatching** menu and enter the technician's employee number or name. Enter the letter **U** to select the **(U)ndispatch** function from the lower menu. The system will now prompt you for a **Job Status** code to document the reason the job is being removed from dispatch. Select **F2** for a list of **Job Status** codes. The job status always appears in the technician's dispatch queue enabling dispatch personnel to review the current status of each job.

To **Redispatch** the technician, bring up the technician's dispatch queue and **Enter** the letter **R** and the job sequence number, **((R#)edispatch** from the lower menu) **Enter** the technician's ETA and select **Y** or **N** to determine if the call information is sent the technician's pager.

Changing the status of an assigned or undispatched call – If the reason a call placed in Undispatch status changes, as in the case of a customer putting a job on hold after the technician has received parts, you can change the **Job Status** code by selecting the letter **C** and the job sequence number **((C#)hange status** from the lower menu). After you select this option, the system will prompt you for the new **Job Status** code. Select the **F2** function key for a list of **Job Status** codes. The change status function can only be used for calls in dispatch status.

3.7 Undispatch for Reason of Reassignment

When a technician is unable to complete a service call and needs to be undispatched from the call and reassigned to another job, Undispatch the technician with the **Undispatch/Reassign Job Status Code**. This will place the call back into the **Assignment** queue for reassignment, and make the unassigned technician available for dispatch. **Note:** When a technician is Undispatched for reason of reassignment, the Work Order originally assigned to that call must be voided and new Work Order number reassigned when another tech is dispatched to that call.

3.8 Undispatch for Reason of Waiting for Parts

When a technician is undispatched with the **Job Status Code** of **Waiting for Parts**, the *Fastrax* system can be set up to automatically bring up the **Purchase Order Entry** screen enabling you to generate a purchase order (**PO**) and order the part at the same time. **Note:** The automatic PO function is set up in the **Database Security Inventory Control** menu. If you do not wish to order the part at that time, select the **F3** function key to exit the Purchase Order Entry screen and return to the Dispatch screen. To generate a PO, select **Enter** at the **PO Number** prompt, the system will generate the PO number after the information is filed, select **Enter** at the **Incident** prompt to accept the current **Incident Number**. **Enter** the letter **S** to have the part delivered to the **Site** address, or enter the letter **L** to have the part delivered to a specified company **Location** such as shop inventory or truck inventory. **Note: Locations** are defined with the **Locations** option found on the **Inventory** menu. **Enter** the vendor's ID number at the **Vendor** prompt, or **Enter** the vendor's name to perform a search, select and **Enter** the vendor sequence number to

load the vendor information in the **Purchase Order Entry** screen. **Enter** the optional **Contact, Comments, Freight** and **Tax** information and **Enter** the letter **I** if the part will be used to stock the technician's truck, or select **Enter** to bypass the prompt.

Enter the part information starting with the **Part Number**, if the part number is not know, **Enter** a description or name of the part to perform a search, select the correct part **Sequence Number** to load the information and return to the Purchase Order Entry screen. **Note:** If the part is not currently in your Part Inventory Database, you will need to enter the part information with the **Parts** option found on the **Main Menu Database/Updates** menu. Enter the quantity of parts ordered and select **Enter** to bypass the **Received** column. The system will automatically fill in the Unit Cost (U/Cost) and the Extended Cost (Ext.Cost.) with the pricing information from your parts data base. The system will advance the cursor to the next line to receive the next part description, when all parts are entered, select the **F3** function key to **Exit** the parts entry screen and bring up the lower screen menu. Select the **F11** function key or **Enter** the letter **F** to **(F)ile** the PO information and enter the part order into the *Fastrax* inventory and accounting systems.

Lower menu options on the Purchase Order Entry screen:

- **(N)ext** – Selecting the Next option brings up a blank screen enabling you to issue a new PO.
- **(A)udit** – Select the audit function to display a complete history of all actions that have taken place for a service call along with the employee responsible for each action.
- **(#) to Change** – Enter the line item number of the order information you wish to edit in the **Rep** field located in the lower left hand corner of the **Purchase Order Entry** screen.
- **(S#)eq** – **Enter** the letter **S** and the **Sequence Number** of the part order information to edit the order entry.
- **(D#)elete** – **Enter** the letter **D** and the **Sequence Number** of the part order information to delete the order entry.
- **(R)ecieve** – Select the **Receive** option to receive and enter the part into the inventory database.
- **(C)ancel** – Select the **Cancel** option to cancel the part order.
- **(F)ile** – Select the **File** option to file the order information.
- **(V#)iew Last Price** – Select the View Last Price option to view the last price for the part ordered from the selected vendor.
- **(P)rint** – Select the **Print** option to print a hard copy of the purchase order.

Lower menu options on the dispatch screen:

- **(N)ext** – Allows you to clear the current screen and select the next technician’s dispatch queue.
- **(M)ail** – The **(M)ail** option is available **only** when a technician has undelivered messages. When a technician has mail, the number of messages will be displayed in the upper right hand corner of his dispatch queue. The **(M)ail** option enables you to review and deliver any important messages to the technician prior to dispatching him to his next job. **Note:** When using the **Dispatch a Call** option, the technician cannot be dispatched to a job until his message queue is reviewed by the dispatcher.
- **(S)ector/(Z)ip Code Pool** – If there are no calls assigned or dispatched in the technician’s dispatch queue, select these options to display all calls pending dispatch in a specific sector or zip code. The **(S)ector** and **(Z)ip Code** options are only available if the technician has no assigned or dispatched calls in his dispatch queue.
- **(T#)raveling** – Select the **(T#)raveling** option to dispatch a technician and document the travel time between service calls.
- **(D#)ispatch** – Select the **(D#)ispatch** option to dispatch a technician to his next job.
- **(R#)edispatch** – When the reason for undischatching a call has been resolved, select this option to redispach the technician to complete the service call.
- **(V)iew avg** – This option displays a technician’s job performance statistics for the past seven days. The information in this table includes, service date, total number of calls, total calls with revenue and average revenue. This feature allows you to determine the technician’s efficiency for a given day prior to dispatching him/her to a valued customer.
- **(E)stimates** – If the technician has any estimates that need to be followed up, you can view, reopen and dispatch them from this screen. **Note:** The estimate must be entered in the **Close a Call** screen before it will appear in the technician’s estimate queue.
- **Un(A#)ssign** – This option allows you to remove an assigned call from a technician’s dispatch queue. The call will be removed from the technician’s dispatch queue and will appear in the assignment queue as available for assignment to another technician.
- **(C#)hange Status** – Use the **(C#)hange Status** option to change the dispatch status of an assigned service call, or a service call that has been put on hold.
- **(U)ndispatch** – If the technician needs to leave the job without completing it (customer not home, waiting for parts, need to reschedule, etc.), select the **(U)ndispatch** option to temporarily remove the technician from the job and put him back on available status. The **(U)ndispatch** option is available only if the technician is currently dispatched to a call.

- **(P)rint** – Select the **(P)rint** option to print a copy of the selected dispatch queue.
- **(O#)rder** – The **(O#)rder** option is used to generate a purchase order **(PO)** for a technician that is on a service call and needs to buy additional parts to complete the job.

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4. Close a Call

When a technician has completed a job, he must call the office with the job invoice information to close the call before he can be dispatched to his next service call. When closing a call you can do either a **Standard Close**, or a **Quick Close**. When the **Standard Close** method is used, the technician relays all the invoice breakdown information over the phone. The **Quick Close** method is the most popular in a busy dispatching situation because it requires the **Invoice Total** only, leaving the rest of the information to be filled in when the paper work comes into the office. If your system has the **Tasking** option turned on, the system will automatically calculate and display the breakdown of charges for the job when you enter the **Task Number** given to you by the technician at the time he closes a call. The **Standard Close**, **Quick Close** and **Close with Tasking** options all put the service call in **Closed** status until the paperwork is received for final approval. If there are situations in which the dispatcher receives the final paper work and customer payment at the time the call is closed, the **Close a Call** procedure also provides options enabling you to approve work orders and to receive payment for service calls.

4.1 Standard Close (Without Tasking)

Select the **Close a Call** option from the **Dispatch** menu to bring up the **Close/Approve an Incident** screen. **Enter** the service call **Incident Number** at the Incident prompt, or press **Enter** to bypass it and enter the **Work Order** number. If the Incident Number or the Work Order numbers are unknown, you can search for the service call information by entering the customer name at the **Incident** prompt, or by selecting **F2** for additional search parameters in the **Customer Call Locator**. The *Fastrax* search function will bring up a list of “best fit” or closest matches to the search information you entered, **Enter** the sequence number of the service call you wish to close. Once you have located and entered the correct service call information, the system will load the customer and technician information into the **Close/Approve an Incident** screen. To perform the **Standard Close** procedure, enter the number one in the **Rep** field in the lower left hand corner of the screen to move the cursor to the **Total Labor** field (Field # 1). Follow the screen prompts to **Enter** the following information:

1. **Total Labor** - This field consists of two parts. The first part is an optional field that prompts for the total number of hours spent on the job. If your company has an hourly rate, this will

automatically calculate the amount to charge for labor based on the hours entered. Alternatively, you can select **Enter** to bypass the first field and enter the total amount that is being charged for labor.

2. **Discount** - Enter the dollar amount that is being discounted from the total price or select **Enter** to bypass this field if there is no discount being given.
3. **Coupons** – Enter the dollar amount of the total amount of coupons being used by the customer. Select Enter to bypass this field if there are no coupons used.
4. **Total Parts** - Enter the total dollar amount that is being charged for all the parts used on the job. Later in the closing process, parts will be listed individually with the quantity and amount that was charged for each part. Select **Enter** to bypass this field if no parts were used.
5. **Service Charge** - If your company has a service charge, enter the amount here or select **Enter** to bypass this field if it does not.
6. **Miscellaneous** – Enter the dollar amount of any miscellaneous charges.
7. **Sub Cont** – Enter the total amount for sub contractor charges.
8. **Permits** - If any permits needed to be pulled for this job, enter the total amount to charge for them. If there were no permits, bypass this field.
9. **Tax Charge** – Enter the amount to charge for tax, if applicable in the state that the job was done: The system will calculate the correct amount to charge for tax based on the labor charge and/or parts charge and display this on the closing screen. If there is no tax charge, bypass this field.
10. **Contract Charge** – Enter the amount of any service contracts sold on the job or bypass if there was no contract sold.
11. **Warranty Charge** – Enter the amount of any extended warranties sold on this job, or bypass if there were none sold.

Grand Total - Enter the **Total** invoice amount. The system will calculate the total based on the charges and discounts entered above and display this amount in the right hand **Total** column, the left hand Total entry column is used to verify the invoice total, and to enter invoice Totals in the **Quick Close** procedure.

13. **Terms** - The terms of payment entered when the call was initially taken will be displayed in this field. If the terms changed when the job is completed, enter the new terms in this field.

14. Permits Used – Enter the letter **Y** if permits were used on this job, selecting **Enter** in this field will default to **No**.

13. Exempt? – Enter the letter **Y** if this service call is tax exempt, this field will default to **No**.

If no parts were used on the job, select the **F11** function key, or the letter **F** to **(F)ile** the Close information. If parts were used, proceed to **Parts Data Entry** screen located in the lower half of the **Close/Approve an Incident** screen.

4.2 Parts Data Entry

After you have entered all the job-related charges, select the letter **S** and the number one to enter the first part used on this job (**(S#)eq** from the lower screen menu) and enter the following information:

- **Part Number** - Enter the individual part numbers used on the job.
- **Quantity** – Enter the number of parts with the same part number used on the job.
- **U/Cost** – Enter the **Unit Cost** of each part entered on this line or select **Enter** to accept the default cost from your inventory database. The **Extended Cost** will be calculated based on the **Unit Cost** multiplied by the **Quantity** entered and will be displayed in the extended cost field.
- **U/Charge** – Enter the price that was charged for each part or select **Enter** to accept the default price from your inventory database. The **Extended Charge** will be calculated based on the **Unit Charge** multiplied by the **Quantity** entered and be displayed in the **Extended** charge field

After the **Extended Charge** information has been entered for the previous part, the cursor will appear on the next line of the **Parts Data Entry** screen ready to accept information for the next part. After all the Parts information has been entered, select the **F3** function key to **Exit**, then select the **F11** function key, or the letter **F** to **(F)ile**. The system will prompt you for service call completion date and time, select **Enter** to accept the current date and time if you are closing the job at the time the technician has finished. If you are closing the job at a later date, enter the date and time the service call was actually finished. The date and time a service call is finished is reflected in the management efficiency reports, so it is important to enter this information as accurately as possible. The call is now **Closed** and in pending status until the paper work comes into the office for approval, and the technician who performed the work is now available for further dispatch.

4.3 Quick Close (Without Tasking)

Enter the information for the call you wish to close as described in the **Standard Close** procedure. Enter the number **10** in the **Rep** field located in the lower left hand corner of the **Close/Approve an Incident** screen (**(#) to Change** option on the lower screen menu) to move the cursor directly to the **Total** field (Field #10). Enter the total invoice amount for the service

call in the **Total** field. Select **F11** or the letter **F** to **(F)ile** the close information. The system will prompt you for service call completion date and time, select enter to accept the current date and time if you are closing the job at the time the technician has finished. If you are closing the job at a later date, enter the date and time the job was actually finished. The call is now **Closed** and in pending status until the paper work comes into the office for approval, and the technician is available for his next dispatch.

4.4 Close with Tasking

If Tasking has been installed on your system, the **(T)ask** option will be available on the lower screen menu. To close a service call with the **Tasking** option, enter the **Incident Number** or work order number as described in the **Standard** and **Quick** close procedures. When you have entered this information, the **Close/Approve an Incident** screen will display the customer and technician information, select the **(T)ask** option from the lower screen menu. If the Task number is unavailable at the time of closing, you can enter a description of the Task in the Task column. The system will then display a list of “best fit” or closest matches to the description you entered. Enter the sequence number of the Task to load the task information into the **Close/Approve an Incident** screen.

When you enter the Task number(s) relayed to you by the technician, the system will load the task name and prompt you for the service charge rate flag, enter **P**, **S** or **E** for the **Preferred**, **Standard** or **Emergency** rate. In the case of maintenance contracts sold, the system will prompt you for the service date. Enter the Quantity (**Qty**) of parts or, if applicable, the number of feet (**# feet**) of a given material that was used for the Task. After you have entered the task information, the total charge for the Task will appear in the **Amount** column and the cursor will move to the next line enabling you to enter another Task if necessary.

After you have entered the last task, select **Enter** or the **F3** function key to display the edit and file menu options in the lower portion of the screen. If you need to make any adjustments to the Tasks you have entered, select the letter **S** and the **Task Sequence Number ((S#)eq** option from the lower screen menu), this will enable you edit any or all of the Task information you have entered. If you need to delete a Task, select the letter **D** and the sequence number of the Task you wish to delete (**(D#)elete** option from the lower screen menu). If no adjustments or deletions are necessary, select the **F11** function key or the letter **F** to **(F)ile** the Task information and display the main Close/Approve an Incident lower screen menu.

The Task breakdown information will now be displayed in the middle portion of the **Close/Approve an Incident** screen. If you need to make any adjustments to the Task breakdown information, enter the line number of the item you need to change in the **Rep** field and select **Enter ((#) to Change** option from the lower screen menu). This will place the cursor on that line item enabling you to make any necessary changes. Once you have made your changes and are satisfied that all the Task information has been entered accurately, select the **F11** function key, or the letter **F** to **(F)ile** the changes. The system will prompt you for the service call completion date and time, select enter to accept the current date and time if you are closing the job at the time the technician has finished. If you are closing the job at a later date, enter the date and time the job was actually finished. The date and time a job is finished is reflected in the

management efficiency reports, so it is important to enter this information as accurately as possible. The call is now closed and in **Pending** status until the paperwork is received and approved, and the technician is available for dispatch to his next assignment.

4.5 Miscellaneous Task Entry (T9999 Code)

To enter a Task that is currently undefined in your companies task book or the *Fastrax* database, select the **(T)**ask option and enter the **T9999** code (miscellaneous task) at the Task prompt. Entering the T9999 code will bring up the **Task Update** screen enabling you to create the miscellaneous task OTF, (“on the fly”) which can be a real benefit when you have a technician that wants to close his current service call and get on to his next job, NOW. At this point you can create an entirely new Task description, or modify an existing task description to fit the miscellaneous Task you are entering.

Modifying an existing Task – Enter the T9999 code in the Task field to bring up the **Task Update** screen. Enter the letter **L** to select the **(L)**oad Task command from the lower screen menu and enter the existing Task number at the **Enter task number to load** prompt, or select the **F2** function key to bring up a selection list of the Tasks defined in the *Fastrax* database. When the existing Task description is displayed, place the cursor on the line you wish to edit by entering the line number of the item in the **Rep** field located in the lower left hand corner of the Task Update screen, **(#) to Change** option from the lower screen menu). If you wish to enter a description of the new Task, enter the letter **T** to select the **(T)**ask Description option from the lower screen menu. Enter the Task description by selecting the letter **S** and the line number you wish to modify or create, and type the description.

To enter the parts associated with the Task, **Enter** the letter **M** to select the **(M)**aterial option from the lower screen menu, enter the number or description of the part in the **Material/Description** field. If a part description is entered, select the part from the list of search results by entering the line number of the part. If the part is not listed in the inventory database, enter **NS** for non-stock items and enter a description along with the quantity and the price of the part(s). After the last part has been entered, select **Enter** to exit the parts list and bring up the lower screen menu editing options. Edit the part information by entering the letter **S** and the line number of the item you wish to edit **((S#)eq Number** from the lower screen menu). If you wish to delete a NS part, enter the letter **D** and the sequence number of the part to be deleted **((D#)elete Number** from the lower screen menu).

Select the **F3** function key to return to the Task Update screen, upon entry of the above task parameters, the system will calculate the **Preferred, Standard** and **Emergency** rates based on the task mark-up percentages entered into your inventory database. Select the **F11** function key, or enter the letter **F** to **(F)**ile the Task description. Upon filing the miscellaneous Task, the system will return to the Close/Approve an Incident screen and list the miscellaneous Task in the Tasking screen. Enter the Preferred, Standard or Emergency rate, and the quantity if applicable. The system will assign the service call Incident Number with a hyphen and sequence number as the miscellaneous Task number.

Creating a new miscellaneous task description – Begin by entering the **T9999** code in the Task list. Enter the Task description in the Description field by entering the Description field number in the **Rep** field (**(#) to Change** option from the lower screen menu), or select **Enter** to accept the **Misc Flat Rate Job** description. Enter the **Skill Area Code** required for the task, or select the **Enter** key to accept the default Code. Select the **F2** function key to bring up a selection list of all **Skill Area Codes** defined in your system. Enter the **Labor Hours**, any **Permit** fees, **Service** fees, **Miscellaneous** charges and any **Tax** levied for the task. Enter **Y** or **N** to indicate whether or not a warranty was sold on the job, and enter the **Warranty** and **Spiff** commission rates if applicable. Enter the Task description, associated parts and save as described in the preceding section on modifying an existing Task.

4.6 Closing Estimate Only calls

When a technician is dispatched to a service call resulting in an **Estimate** being given, select the **Close a Call** option from the **Dispatching** menu and bring up the call information in the **Close/Approve an Incident** screen. Enter the letter **E** to select the **(E)stimate** option from the lower **Close/Approve an Incident** screen menu and bring up the **Enter Job Estimate** screen. Enter the estimate information in the standard or quick close format as described above. After you enter the estimate information the system will bring up the comments window enabling you to enter a description of the estimate. After you have entered your comments, select the **F11** function key to save the comments, and select the **F11** function key again, or enter the letter **F** to **(F)ile** the estimate information. Upon filing the estimate information, the system will display the **Do you want to cancel this service call Y/N** prompt. If the service call involved billable work being performed along with the estimate, enter **N** to return to the Close/Approve an Incident screen and enter the service call close information. **Note: If the estimate was given on a service call involving billable work, the estimate must be entered first.** If the service call involved an estimate only, Enter **Y** to cancel the service call. The system will prompt you for a **Cancel Reason Code**, enter the Cancel Reason Code for Estimate Only, or select the **F2** function key to bring up a selection list of the Cancel Reason Codes defined in your system. The Estimate information will now be included in the Fastrax manager's estimate reports, and the call will be listed in the technician's Estimate queue.

4.7 Reviewing, Editing, Opening and Deleting Outstanding Estimates

Outstanding estimates can be reviewed, updated, opened or deleted at the service call and the technician level. To perform these functions at:

- **The service call level:** Select the **Close a Call** option from the **Dispatch** menu and bring up the call information. Select the **(E)stimate** option from the lower screen menu to view the estimate details. To edit the estimate itemized breakdown, enter the line number of the item you wish to update in the **Rep** field located in the lower left hand corner of the **Enter Job Estimate** screen (**(#) to Change** option from the lower screen menu). To edit or update the comments associated with the estimate, enter the letter **C** to select the **(C)omments** option, after the comments have been entered, select the **F11** function key to save the comment. Any notes entered when the call was opened will appear in the Estimates Comment screen. Conversely, any comments entered for the estimate will appear in the **Open/Review Service**

Call screen when the estimate is opened as a new service call. To open the estimate as a new service call, enter the letter **O** to select the **(O)pen a Call** function from the lower screen menu, the call will be placed in open status and is automatically assigned to the technician that issued the estimate. If the estimate is not accepted, enter the letter **D** to select the **(D)elete** option and remove the estimate from the system.

- **The technician level:** Select the **Dispatch a Call** option from the **Dispatch** menu. Bring up the technician's **Dispatch Queue** by entering the technician's employee number or name, and select the **(E)stimate** option from the lower screen menu. The **(E)stimate** command will bring up a list of all Estimates the technician is responsible for, enter the letter **S** and the estimate **Sequence Number** to load the estimate information into the **Enter Job Estimate** screen. All options described in the above paragraph will now be available. If the estimate has not been accepted by the customer, it can be deleted directly from the technician's estimate queue by entering the letter **D** and the **Sequence Number** of the estimate to be deleted (the **(D#)elete** option from the lower screen menu).

Outstanding estimates issued by all employees can be viewed at the **company level** by selecting the **Estimate Report** option from the **Manager** menu. **Note:** You must have manager privileges to access the Manager Report functions. Select **Yes** to view Estimates for **All Companies**, select **Approved** or **Closed** call status, Enter **A** to view estimates for **All Employees**, enter the **Start** and **End** date and the **Printer option** (Terminal or Line Printer) and select the **F11** function key to print the report.

Lower menu options on the Close/Approve an Incident screen:

- **(N)ext** – Clears the current incident information from the screen and allows you to enter the next incident.
- **(W)O Approval – Work order approval.** When a technician completes and closes a job, and the paper work comes into the office, it must be approved. The Work Order Approval process involves comparing the charges, parts and terms the technician has listed on the work order with the information entered into the system. Begin the **Work Order Approval** procedure by bringing up the service call information in the **Close/Approve an Incident** screen. If you have paper work from a job that has not been closed, enter the work order information as described in the **Standard Close** or **Close with Tasking** procedures and proceed directly with the Work Order Approval process. When you have verified that the system information matches the Work Order information, **Enter** the letter **W** for **(W)O Approval** to complete the approval process. The system will now bring up the **“Cash Batch”** screen enabling you to receive payment if necessary, if no payment has been received at the time, select **F3** to exit the screen. Upon completion of the Work Order Approval process, the work order information will be automatically entered into the **Fastrax** accounting and payroll systems.

- **(R)ecieve – Receive payment.** The Close/Approve an Incident screen enables you to receive payment for a job and add it to a **Batch** deposit when you **Close** and **Approve** a service call. Prepayments against a job that has not been closed or approved can also be received. To receive and batch payments, bring up the service call information into **the Close/Approve an Incident** screen and **Enter** the letter **R** to select the **(R)ecieve** option from the lower screen menu. You will be prompted for a batch number for the payment, and the batch date. The batch number is used to identify a group of payments that are included in a single deposit. If no previous bank deposits have been made for the current day, select **Enter** to accept the default value of Batch one. You can have an unlimited number of cash batches for each day, but you cannot use a batch number that has already been deposited on that day. Follow the screen prompts to enter the type(s) of payment received: 1 - Check, 2 - Credit card or 3 - Cash. For check payments, you will be prompted for the bank ID number, the check number and the amount the check is for. For credit card payments, you will be prompted for the credit card number and the amount to be charged. For cash payments, you will be prompted for the amount of payment only. More than one payment type may be applied to a single work order. When you are done entering the payment information, enter the letter **R** a second time to **(R)ecieve** the payment and record it in the system. After you have received the payment, the screen will display the current balance for that service call.
- **(#) to Change – Number to change.** Enter the number of the work order breakdown line you wish to edit in the **Rep** field located at the lower left of the **Close/Approve an Incident** screen.
- **(S#)eq – Sequence number.** Enter the letter **S** plus the **Sequence Number** corresponding to the entry in the **Parts** or **Task** list that you wish to edit.
- **(D#)elete – Delete number.** Enter the letter **D** plus the **Sequence Number** corresponding to the entry in the **Parts** or **Task** list that you wish to delete.
- **(P)ay Commission –** Select this option to pay commissions to the technician before final payment is received from the customer. This option will appear only after the work order is approved through **(W)O Approval**.
- **(C)ancel –** If a customer decides to cancel a call at any time prior to dispatching a technician, select the **(C)ancel** option from the lower screen menu to document the reason for cancellation. When you select the **(C)ancel** option, the system will prompt you for a **Cancel Code** to document the reason the customer has canceled the call, select the **F2** function key for a list of Cancel Codes. Once a call is cancelled, it is placed in the **Lost Call** queue for review. This feature gives you the opportunity to contact the customer and regain lost business.
- **(A)udit –** The **Audit** option will display the dispatch audit trail for a service call. The audit trail will list each event that has taken place for the call, and the employee responsible for each event.

- **(S)**end to Printer – Select the **List** option to send the current invoice information to a selected printer.
- **(V)**iew – The **View** option will display a list of all service calls performed at the site you are currently closing enabling you to evaluate the service history of your current customer.
- **(T)**ask – The **Task** option will bring up the Tasking screen enabling task number entry if **Tasking** is installed on your system.

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5. Service Manager

Select the **Service Manager** option for complete service call management along with technician Assignment and Dispatch functions. The Service Manager enables you to list and sort service calls by multiple criteria, change the status of the service call, view customer service call history, open new service calls and reschedule service calls.

5.1 Listing and Sorting Service Calls

Begin by selecting the **Service Manager** option from the **Dispatching** menu and select your service call list by entering your selection criteria in the following fields:

Display by Sector – Enter the **Sector** number of the area in which you wish to view service calls. Select the **F2** function key to access the list of Sectors defined in your system.

Please Note: The Sector number or designation you enter in the Sector field can correspond to a Zone, District, Region, State or Nation level. However, the larger the area a Sector designation corresponds to, the more entries your service call queue will have (See **Sectors** in the **Database Update** menu section of this manual).

Display by Tech – If you wish to view calls for a single technician, enter the technician’s **Employee Number** in the **Tech** field, or select the **F2** function key and enter the technician’s first or last name (not both) in the **Last Name** field to search for the technician information. Select and **Enter** the technician sequence number. Alternatively, if you wish to view calls for all technicians, select **Enter** to bypass the Tech field and service calls for all technicians will be listed.

Display by Status – Enter one of the following options in the Status field: **(A)**ll Calls, to view **All** open service calls; **(D)**ispatched, to view calls in **Dispatched** status only; **(U)**ndispatched, to view **Assigned** and **Unassigned** service calls, and calls on **Hold** along with the **Hold Status**; **(O)**ther, to view calls in **Assigned** or **Unassigned** status only.

Sorting the service call list – Enter one of the following **Sort** options in the **Sort by** field: **(V)**alue, to sort service calls by the company average dollar value and close ratio for each call. The average dollar value and close ratio are based on the **Problem Code** entered when the call was taken; **(Z)**one/Value, to perform a primary sort by location, and a secondary sort by service call value within a location; **(T)**ech/Value, to perform a primary sort by the technicians assigned to the service calls, and a secondary sort by the value of the calls assigned to each technician; **(D)**ate/Time/Value, to perform a primary sort by service call schedule date, a secondary sort by the time the calls were scheduled on a given date and a tertiary sort by call value; **(S)**tatus/Value, to perform a primary sort by the call status, and a secondary sort by call value; **(P)**roblem, to sort calls by the problem code assigned when the call was taken.

Display by date – Enter the beginning and ending date of the time period in which you wish to view pending service calls.

Display by tech value – The **TechVal** function assists you in selecting the best technician to dispatch to a service call by displaying the selected technician's average dollar value and closing ratio along with the companies average dollar value and closing ratio for each service call Problem Code. If the Sectors are set up at the Zone level in your system, the TechVal function also displays the distance from the technician's present location to each service call. To display the technician information, enter the technician's employee number in the TechVal field, or select the **F2** to search for the technician's employee number.

To change any of the above list and/or sort variables after the call list has been displayed, enter the variable field number in the **Rep** field located in the lower left hand corner of the Call Management screen and select a new criteria from the lower screen menu.

5.2 Assigning, Dispatching and Traveling Service Calls

Assigning a service call from the Service Manager – use the cursor keys to highlight the call to be assigned and enter the letter **A** to select the **(A)**ssign command from the lower screen menu. The customer information and a list of technicians who work in the area and who are qualified to do the job will be displayed. The technician selection by job location and qualification is determined by the **Problem Code** entered when the call was taken, and the **Sector** the service call is located in. Select and **Enter** the **Sequence Number** of the technician you are assigning the call to. After entering the technician's sequence number, the technician's Page Tracking screen will come up enabling you to enter any messages for the technician with the **(P)**age option (See the section on Page Tracking in this chapter for a description of all options available on the Page Tracking screen). The call is now Assigned to that technician and will appear in the Service Manager queue with the technician's employee number in the Tech field, and the call status will be changed to Assigned. The call will also be listed in the technician's dispatch queue in Assigned status.

Dispatching a service call from the Service Manager – Use the cursor keys to highlight the call to be dispatched and enter the letter **D** to select the **(D)**ispatch command from the lower screen menu. Enter the employee number of the technician you are dispatching, or select the **F2** function key and enter the employee's first or last name (not both) to search for the employee number. Enter the technician's next work order number and the ETA. The system will prompt

you for the dispatch **date** and **time**, select **Enter** to accept the current date and time if you are dispatching the service call at the present time. If, due to various factors, you are dispatching the service call a significant amount time after the technician has actually arrived on the job, enter the date and time the job was actually dispatched. **The date and time a job is dispatched and finished are reflected in the management efficiency reports, so it is important to enter this information as accurately as possible, particularly if you are using the travel option to track technician travel time.** If Alpha paging is installed on your system, you have the option to send the service call information to the technician over his/her pager. The call is now dispatched and will appear in the Service Manager queue with the technician's employee number in the Tech field, and the call status will be changed to Dispatched. The call will also be listed in the technician's dispatch queue in Dispatched status (See the section on **Dispatch a Call** in this chapter).

Dispatching service calls with the Travelling option – The **Traveling** option is used to record technician travel time between service calls. To initiate the **Traveling** dispatch option, enter the letter **T** to select the **(T)ra**vel option from the lower screen menu at the time the technician calls in for his next assignment. Enter the employee number of the technician you are traveling, or select the **F2** function key and enter the employee's first or last name (not both) to search for the employee number. Enter the technician's next work order number and the ETA. The system will prompt you for the **Travel start Date** and **Travel start Time**, select **Enter** to accept the current date and time if you are traveling the service call at the present time. If, due to various factors, you are traveling the service call a significant amount time after the technician has actually arrived on the job, enter the date and time the technician actually began traveling. This procedure records the technician's start time. When the technician arrives at the job site, he is required to call the dispatcher and indicate his time of arrival. At the time of his call, select the **(D)is**patch option from the lower screen menu and enter the **Arrived at Date** and the **Arrived at Time**. **The date and time a technician begins traveling and is dispatched are reflected in the management efficiency reports, so it is important to enter this information as accurately as possible.** This procedure will record the technician's arrival time, or end travel time. Selecting the Travel option puts a time stamp in the service call audit trail indicating the time the technician was dispatched and the time he arrived at the job site.

5.3 Changing Work Order Numbers

If an incorrect work order number is entered, enter the letter **W** to select the **(W)O** Chg option from the lower screen menu and enter the correct number.

5.4 Searching for Calls, Viewing Service Call Information and History

To search for a specific service call, enter the letter **S** to select the **(S)earch** option from the lower screen menu and enter the customer name in the **Enter Search** field. The **(S)earch** command will display the search result only, to return to the complete service call list for the selected sector, **Enter** the number **One** in the **Rep** field to place the cursor in the Sector field, enter the **Sector Number** and the list and sort parameters of the service call list you wish to view. To view the customer information for the service call you searched for, or for any call in the **Call Management** screen, highlight the service call and enter the letter **O** to select the **(O)pen** option from the lower screen menu. This command will open the service call in the **Open/Review**

Service Call screen. To view the service call history for a particular customer, highlight the call and **Enter** the letter **H** to select the **(H)**istory option from the lower screen menu.

5.5 Rescheduling Service Calls

Highlight the service call you wish to reschedule and **Enter** the letter **R** to select the **(R)**eschedule option from the lower screen menu. **Enter** the reschedule date in the **Date** field and **Enter** a time estimate for the job in the **Hrs to Complete** field. **Enter** the **Time Code** corresponding to the reschedule time in the **Time Code** field or select the **F2** function key to bring up a selection list of Time Codes. If the Time Codes defined in your system are comprised of time ranges, such as 12-2, and you want a specific time to appear in the service call list, **Enter** the scheduled time in the **Time** field. **Enter** the **Reschedule Reason Code** that describes the reason for rescheduling the service call in the **Schedule Reason** field, or select the **F2** function key to bring up a selection list of Reschedule Reason Codes. After the reschedule parameters have been entered, select the **F11** function key to file the schedule changes. **Note:** The time appearing in the **Time Starts** field is the start time entered in the Time Code definition set up in the **Database Codes** menu.

5.6 Changing Service Call Status

In the event a technician cannot complete a job due to various factors such as needing parts, or additional help, the call status must be changed before the technician can be dispatched to his next service call. To change the status of a dispatched service call, highlight the call and **Enter** the letter **C** to select the **(C)**hg Status option from the lower screen menu. **Enter** the **Job Status Code** that best describes the new status of the call, or select the **F2** function key to bring up a selection list of Job Status Codes. **Note:** The Change Status function can only be used for service calls in **Dispatched** status.

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6. Credit Hold

When a customer requests billing terms for the first time, he will automatically be assigned a customer number when the call is filed and be placed in the **Credit Hold** queue. The call will not be available for **Assignment** or **Dispatch** until the customer's credit is approved and a credit limit issued. **Special Note:** The *Fastrax* system uses the term "**Customer**" to list all customers that are on billing terms and assigns a **Customer Number**, all other service call customers are listed as "**COD Customers**" and are not assigned a customer number.

The **Customer Update** screen is a two-part screen listing customer credit information on page one, and customer demographic information on page two. The Customer Update screen enables you to enter and/or review the customers credit information and, if the customer is credit worthy, assign them a credit limit. To issue a credit limit for a new billing customer, select **Credit Hold** from the **Dispatch** menu. Select the customer from the Credit Hold list by entering the customer **Sequence** number (**Seq (#)** from the lower screen menu) to load the customer information in the **Customer Update** screen. After review and/or verification of the information given, you can choose to either approve credit by assigning a credit limit, or deny credit for this customer by entering 0 in the credit limit field. Once you have entered all necessary credit information, select **F11** to file. To view and/or update the **Customer Demographic** information, after you have displayed the customer information in the Customer Update screen, select the **Page Down** key to select page two of the Customer Update screen.

This procedure will release the call back into the normal dispatch flow. However, if credit was denied, the call will have a "**Cash Only**" flag displayed throughout the system. The number of calls on credit hold statue will flash in the lower left corner of the main screen until a credit limit is issued or denied.

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7. Message Center

The **Message Center** is used for distributing electronic mail to employees throughout the company, either through direct computer terminal access or, if your system has **Alpha Paging** installed, through an employee's pager. Mail can be sent to your self, to individual employees, all employees or to a specific group of employees. The **Message Center** also enables you to set up mail messages for one time delivery, and reoccurring mail for periodic delivery. Mail can also be printed for distribution to employee's mailboxes. If a technician has any mail in his message queue, and you are dispatching with the **Dispatch a Call** option, rather than the **Service Manager** option, he cannot be dispatched to his next job until he receives it. This feature ensures that the technician will receive all job-related messages prior to being dispatched. If an office employee has mail, the number of messages in his queue will be displayed in the lower left-hand corner of the Main Menu screen when they log into the system.

7.1 Sending a Message to An Individual

Select the **Message Center** option from the **Dispatching menu** to bring up the **Fastrax Electronic Message System**. If the message is to yourself, enter your name or employee number in the **Employee** prompt, if the message is to another employee, enter the employees name or employee number at the **Employee** prompt. If you do not know the employee's full name, enter the employee's first or last name to do an employee search. In the case of first name searches, and some common last name searches, the system will display a list of "best fit" or closest match search results, select the **Sequence number** of the employee you wish to send a message to. After the employee information is displayed in the Electronic Message System screen, **Enter** the letter **A** to **(A)dd** mail, enter a brief description of the message at the **Regarding** prompt, or select **Enter** to bypass this field. If the message is confidential and the employee's **Employee Type Code** is set up to receive confidential mail, enter the letter **Y** for **Yes** in the **Confidential?** field, or select **Enter** to accept the default of **No**. If the **Employee Type Code** is not set up to receive confidential mail, the **Confidential?** field will default to **No** and automatically be bypassed. **Note:** The **Employee Type Code** option for **Confidential** mail is located on the **Main Menu Database Codes** menu. The system will now display the message entry screen enabling you to enter your message. After you have finished typing your message, select **F11** to exit the message entry screen and return to the **Electronic Message System** screen, select **F11** again, or **Enter** the letter **F** to **(F)ile** the message.

If **Alpha Paging** is installed on your system, and the employee you are sending the message to is set up for Alpha Paging in their **Employee Update** screen, the system will enable you to send the message to the employee's pager. Select the letter **Y** to send a page, or select the letter **N** to deliver the message to the employee's message queue only. After you have sent the message, the screen will be cleared and ready to accept employee information for additional messages if necessary. When you are finished with the **Message Center**, select **F3** to **Exit** and return to the main **Dispatching** menu.

7.2 Sending a Direct Page

To send a direct page to an employee without entering it into the message system, enter the employees name or employee number at the **Employee** prompt and **Enter** the letter **P** to select the **(P)age** option from the lower screen menu. If you are paging with job specific information from the **Open/Review Service Call** screen, enter the job **Incident Number** at the Incident

prompt. If you are sending a short message, or “free-form” communication, select **Enter** to bypass the **Incident** prompt and type your message at the **Message to be sent:** prompt, the message will be sent to the technician’s pager after you select **Enter**. **Note:** The *Fastrax* system keeps no record of messages sent with the **(P)**age option.

7.3 Sending a Message to All Employees or a Group of Employees

Select the **Message Center** option from the **Dispatching** menu to bring up the **Electronic Message System**. Select **Enter** to bypass the **Employee** field and advance the cursor to the **Send to** field. If you are sending a message to **All** employees, select **Enter** to accept the **ALL** default in the **Send to** field. If you are sending a message to a specific group of employees (i.e. technicians, customer service, general managers, etc.), enter the **Employee Type Code**, or select the **F2** function key for a list of Employee Type Codes defined in your system, and select the code for the employee group you wish to receive your message. If your company has offices in different locations and you are sending a message for one location only, **Enter** the **Sector** or region you want the message delivered to, or select **Enter** to accept the **All Sectors** default value. Select **F2** for the list of Sectors in your system. Enter a brief description of the message in the **Regarding** field, or select **Enter** to bypass this field. If the employee group you are sending the message to has their **Employee Type Code** set up to receive confidential mail, the cursor will advance to the **Confidential?** field enabling you to set this option, if not, the Confidential? field will be bypassed and the message entry screen will be displayed. After you have entered your message, select **F11** to exit the message entry screen and return to the **Electronic Message System** screen, select **F11** again, or **Enter** the letter **F** to **(F)**ile and send the message.

If **Alpha Paging** is installed on your system, and the employee group you have selected is set up for Alpha Paging, you will be given the option to send the message to their pagers.

7.4 Reading a Message

To read your messages, or review messages for verbal delivery to another employee, select the **Message Center** option from the **Dispatching** menu and enter your name or employee number, or the name or employee number of the employee whose messages you are reviewing. If you are reviewing another employee’s mail, and you do not know the employee’s full name, you can perform a search by entering the employee’s first or last name. If the system brings up a list of search results, select and **Enter** the **Sequence Number** of the employee you are looking for to enter the employee information in the **Electronic Message System** screen. When you have selected the employee, **Enter** the letter **D** to activate the **(D)**eliver option from the lower screen menu and display any message(s) in the message queue. If there are several messages in the selected message queue, selecting **(D)**eliver will display the messages sequentially starting with the first message in the queue, select **Enter** to proceed to the next message, keep selecting **Enter** to scroll through all messages in the queue. After you have read the last message, the system will display the **All Messages have been Delivered, Press Return** (Enter) flag. Selecting **Enter** will return you to the selected employees message screen. If you need to reread a specific message after delivery, selecting **(D)**eliver will enable you to scroll through the messages again.

Alternatively, you can bring up a list of all messages in the selected message queue by entering the letter **L** to activate the **(L)**ist option from the lower screen menu. The system will list all

messages in the selected message queue by the **Regarding** comments, the **Name** of the employee that sent the message, the **Date** and **Time** the message was sent and the **Confidential** status of the message. Select and **Enter** the message **Sequence Number** to display the message. If there are several messages in the selected queue, selecting **Enter** will scroll through any remaining messages starting with the selected message and proceeding to the end of the list. Any messages listed in the message queue prior to the selected message will not be displayed.

Once you have displayed a message, you have several options in the lower screen menu:

- **(C)opy** – Select the **(C)opy** option to send a copy of a message to another employee. To send a copy of the selected message, select and **Enter** the letter **C** to activate the **(C)opy** option, enter the name or employee number of the employee you are sending the copy to in the **Send to** field and **Enter**. The message will now be copied to that employee's message queue and, at this point you also have the option to send the message to the employee's pager. This option **WILL NOT** remove the message from your personal message queue
- **(T)ransfer** – Select the **(T)ransfer** option to transfer message to another employee. To Transfer the selected message, select and **Enter** the letter **T** to activate the **(T)ransfer** option, enter the name or employee number of the employee you are **Transferring** the message to in the **Send to** field and **Enter**. The message will now be Transferred to that employee's message queue and, at this point you also have the option to send the message to the employee's pager. This option **WILL** remove the messages from your personal message queue.
- **(A)ppend** – Select the **(A)ppend** option to edit or add additional information to a selected message. To Append a selected message, select and **Enter** the **A** to activate the **(A)ppend** option and load the message into the message entry screen. After you have edited the message, select **F11** to exit the message entry screen and return to the **Electronic Message System** screen, select **F11** again, or **Enter** the letter **F** to **(F)ile** and send the message. The system will enter a time and date stamp in the message indicating when the message was updated, along with the employee number of the employee who has appended the message.
- **(D)elete** – Select the **(D)elete** option to delete the entire current message. If there are multiple messages in the selected message queue, selecting **(D)elete** will delete the current message and display the next message in the queue.
- **(D#)elete – Delete Line Number**. Select the **(D#)elete** option to remove a specified line from the current message. To Delete a line from a message, select the letter **D** and the **Line number** of the message and **Enter**.
- **(S)ave** – The **(S)ave** option removes the message from your current message queue and saves it to your message history queue. Select and **Enter** the letter **S** to **(S)ave** the current message to history.
- **(R)egarding** – The **(R)egarding** option enables you to change the message description in the Regarding field and the status in the Confidential? field. This option is not available for

messages in the message history queue. Note: **Messages** that have been saved to history are listed by and can be searched for with the **Regarding** comment.

- **(P)rint** – Select the **(P)rint** option to print a hard copy of the current message for conventional delivery.

7.5 Retrieving Saved Messages from the Message History Queue

To retrieve saved messages from your **Message History Queue**, select the **Message Center** from the **Dispatching** menu, enter your name or employee number in the **Employee** field and select **(H)istory** from the lower screen menu. If you know the description in the message **Regarding** field, enter it in the Message History Queue's Regarding field to search for a specific message, if the description is not known, select **Enter** to bypass the Regarding field. Enter the date from which you wish to begin reviewing messages in the **Start Date** field, or select **Enter** to bypass the Start Date field and review all messages. Select and **Enter** the sequence number of the message you wish to review, the message will be displayed and the lower screen menu **(C)opy**, **(T)ransfer**, **(A)ppend**, **(D)elete**, **(D#)elete** and **(P)rint** options will be available. Please refer to the above section titled "**Reading a Message**" for a detailed description of these options.

7.6 Sending Reoccurring Messages and Messages for Future Delivery

The **Reoccurring Mail** option in the **Electronic Message System** enables you to send a message to yourself or another employee that will not be delivered until a specified date and time. You can also enter a message that you want to be posted repeatedly with a specified frequency, such as reminders of weekly, monthly or annual company meetings. **Note:** To read or enter reoccurring mail, your **Employee Type Code** must be set up in the system database to allow access to this feature.

To enter and send a reoccurring message, or a message to be delivered one time at a future date to yourself or another employee, enter the recipients name or employee number in the **Employee** field of the **Electronic Message System** screen. Select the **(R)eoccurring Mail** option from the lower screen menu to bring up the **Reoccurring Messages** screen. Select the **(A)dd Mail** option and **Enter** a message delivery frequency option in the **Frequency** field. The options available are: **(O)nce**, **(D)aily**, **(W)eekly**, **(M)onthly** and **(A)nnually**, select the **(O)nce** option for a message you want to deliver in the future one time only. After you enter the message delivery frequency option, the system will prompt you for the delivery date and time. If you select the **(O)nce** option for future message delivery, enter the date and time for delivery. If you select the **(D)aily** option, you will be prompted for time of delivery only. If you select the **(W)eekly** option, you will be prompted for the day of the week and time of delivery. Enter the day of the week as a number, i.e., 1 for Monday, 2 for Tuesday, etc. The **(M)onthly** option will prompt you for a **Start Date** and time, enter the day of the month and the time of day you want your message to be delivered every month. The **(A)nnual** option will prompt you for the date and time you want your message to be delivered every year.

After you have entered the message delivery frequency, date and time, enter a description of the message in the **Regarding** field and the confidential status in the **Confidential?** field. **Note:** The **Fastrax** system **(L)ist** command includes the **Regarding** comment field as one of the parameters in the message list, therefore it is recommended that you do enter a description in the Regarding

field to facilitate the reviewing of messages at a future date. The system will now display the message screen, type your message and select **F11** to exit the message screen, select **F11** again, or enter the letter **F** to **(F)**ile your message.

To review and update **Reoccurring Messages**, select **Message Center** to bring up the **Electronic Message Center** screen and enter the appropriate employee name or employee number in the **Employee** field. Select the **(R)**eoccurring Mail option and enter the letter **L** to **(L)**ist all messages in the **Reoccurring Mail Queue**. The system will display all messages with **Regarding** comments, the **Frequency**, **Date** and **Time** the message was entered, the **Confidential** status of the message and the **Employee Number** and **Name** of the employee who sent the message. Select and **Enter** the **Sequence number** of the message you wish to review. Once you have selected the message to review, the following options are available from the lower screen menu:

- **(#)** to Change – **Number to Change**. Select the Number to Change option to change the message delivery **Frequency**, **Date**, **Time**, **Regarding Comment** or **Confidential** status. After you have loaded the message into the message screen, simply enter the number of the delivery instruction field you wish to change and **Enter** your changes, the system will now bring up the message screen enabling you to make any changes to the message itself. After you have reviewed and/or updated the message, select **F11** to **Exit** the message screen and select **F11** again or the letter **F** to **(F)**ile the message.
- **(M)**odify – If changes to the **Frequency** and **Delivery Date** and **Time** of a reoccurring message are unnecessary, but you wish to update the contents of the message, select the **(M)**odify option to load the message directly into the message screen. After you have updated the message, select **F11** to exit the message screen and select **F11** again, or the letter **F** to **(F)**ile the message.
- **(D)**elete – Select the **Delete** option to remove any unwanted messages from your recurring mail queue.

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8. Page Tracking

The **Page Tracking** feature is the technician communication center of the dispatch module. When you need to get in contact with a technician, enter his employee number or name at the **Employee** prompt to list all phone numbers on file for him. If **Alpha Paging** is installed on your system, customer information can be sent directly to the technician's pager by entering the service call **Incident Number** at the **Incident** prompt. You can also send a free-form message to the technician by selecting **Enter** to by-pass the **Incident** field and then entering your message at the **Message to be sent** prompt. The Page Tracking screen also keeps a history of all pages sent to the technician including the date and time he was paged. You also use the **Page Tracking** option to set a technician's status as **Unavailable** or to **Hold Dispatch**, and to document any **Complaints** lodged against a technician.

8.1 Sending and Reviewing Pages

To send and/or review pages sent to a technician, select the **Page Tracking** option from the **Dispatching** menu and enter their employee number in the **Employee** field. You can also enter the employee's name, or select **F2** to search for the employee information. Once you have found and displayed the employee information, the screen will display all telephone numbers on file for the employee in the upper right hand corner. The technician's page history will be displayed in the left-hand side of the screen, along with the technician's **Hold Dispatch** history in the right-hand side of the screen. Select and **Enter** the letter **P** to **(P)**age the technician. If you are paging with job specific information from the **Open/Review Service Call** screen, enter the job **Incident Number** at the Incident prompt. If you are sending a short message, or "free-form" communication, select **Enter** to by-pass the **Incident** prompt and type your message at the **Message to be sent:** prompt, the message will be sent to the technician's pager after you select **Enter**.

Lower menu options on the Employee Page Tracking screen:

- **(N)**ext Employee – Clears the current employee information from the screen and allows you to select the next employee.
- **(U)**navailable – When a technician is unavailable for assignment or dispatch for short periods of time, you can place him on **Unavailable** status. The technician can still be assigned and dispatched, but he will be flagged as **N/A** or **Not Available** in the technician **Assignment** queue. When you select a technician on Unavailable status for assignment, the system will display a message indicating their status as Unavailable. To put a technician on Unavailable status, **Enter** the technician's name or employee number in the **Name** field of the **Employee Page Tracking** screen. **Enter** the letter **U** to select the **(U)**navailable option and **Enter** the reason the technician is unavailable in the **Reason** field. To put the technician back on **Available** status, enter the technician's name or employee number in the Employee field of the Page Tracking screen and select the **(A)**ailable option from the lower screen menu.
- **(H)**old Dispatch – If there are reasons you do not want a technician dispatched, enter the technician's name or employee number in the **Name** field of the **Page Tracking** screen and **Enter** the letter **H** to select the **(H)**old Dispatch option from the lower screen menu. While in **Hold** status, the technician can be **Assigned** service calls, but he will be unavailable for

dispatch. To take a technician off of Hold status, Enter the letter **R** to select the **(R)elease** dispatch option from the lower menu of the technicians Page Tracking screen. Both **(H)old** Dispatch and **(R)elease** Dispatch events are documented by the system and appear in the **Dispatch Restricted** column of the Page Tracking screen.

- **(C)omplaints** – Select the **(C)omplaints** option if you need to document a complaint against a technician. The following options and procedures are available with the Complaint option:

Customer complaint Documentation

To document a complaint, enter the name or employee number of the employee receiving the complaint in the **Name** field of the **Page Tracking** screen, **Enter** the letter **C** to select the **(C)omplaints** option from the lower screen menu. This will bring up the **Employee/Incidents Complaints** screen, **Enter** the letter **A** to select **(A)dd Complaints** from the lower screen menu. Begin by **Entering** the name of the employee who will address the complaint in the **Handled by** field and **Enter** the **Complaint Type Code** that best describes the complaint in the **Complaint Type** field. Select the **F2** function key for a selection list of Complaint Type Codes defined in your system. The system will now display the **Complaint Entry** screen enabling you to enter a description of the complaint. After you have entered the complaint description, select **F11** to **Exit** the Complaint Entry screen and return to the Employee/Incidents Complaints screen. Select **F11** again, or the letter **F** to **(F)ile** the complaint.

To **Edit** and/or **Update** the Complaint description after you have exited the **Complaint Entry screen**, but have not saved the description, **Enter** the letter **S** and the line number of the line you wish to edit, **((S#)eq** from the lower screen menu). The **(S#)eq** command will reload the complaint description in the Complaint Entry screen enabling you to perform any necessary editing or updating. If you need to delete one or more lines from the complaint description, **Enter** the letter **D** and the line number you wish to delete (The **(D#)elete** function from the lower screen menu). Select **F11** to **Exit** the Complaint Entry screen and return to the Employee/Incidents Complaints screen. Select **F11** again, or the letter **F** to **(F)ile** the complaint.

To **Edit** and/or **Update** the Complaint description after it has been filed, open the relevant Employee/Incident Complaints screen and locate the message you wish to edit. The system will display the last complaint entered. If additional complaints have been entered since the complaint that requires editing was saved, **Enter** the minus sign (The **(-) Pg Back** option on the lower screen menu) to scroll back and display any previous complaint(s). Repeated entry of the minus sign will take you to the beginning of the employee's complaint queue. Select the **Enter** key or **Carriage Return** (The **(CR) Pg Fwd** option on the lower screen menu), to scroll forward to the end of the complaint Queue.

Alternatively, you can bring up a list of all messages in the selected message queue by entering the letter **L** to activate the **(L)ist** option from the lower screen menu. The system will list all complaints by the Employee Number in the case of complaints lodged against an employee, or by the Incident Number in the case of complaints lodged against a service call. The individual that entered the complaint, the date and time the complaint was entered, the

Complaint Type Code used to document the complaint and a portion of the first line of the complaint description will also be displayed. Select and **Enter** the message **Sequence Number** to display the message. If there are several messages in the selected queue, selecting **Enter** will scroll through any remaining messages starting with the selected message and proceeding to the end of the list. Any messages listed in the message queue prior to the selected message will not be displayed. After the correct Complaint description has been found, **Enter** the letter **P** to select the A(**P**)pend option from the lower screen menu. The A(**P**)pend option will reload the Complaint description into the **Complaint Entry screen** enabling you to make any changes. When all editing/updating has been performed, select the **F11** function key to exit the Complaint entry screen. Select **F11** again, or **Enter** the letter **F** to (**F**)ile any changes you make.

8.3 Customer Complaint Resolution

Note: The Complaint option available in the **Page Tracking** screen is primarily used for **complaint entry**. Selecting the Page Tracking option for **complaint resolution** lists complaints lodged against a single employee. Select the **Complaint Queue** option from the **Dispatching** menu to view a list of all complaints assigned to a manager for resolution. Please refer to **Section 13** of the **Dispatch** module documentation for a complete discussion of the **Complaint Queue** option.

To resolve a customer complaint with the Page Tracking option, enter the name or employee number of the employee the complaint has been lodged against in the **Name** field of the **Page Tracking** screen, and **Enter** the letter **C** to select the (**C**)omplaints option from the lower screen menu. This will bring up the **Employee/Incidents Complaints** screen and display the last complaint entered against the employee. The date and time the complaint was entered, the name of the employee that entered the complaint and the Complaint Type Code used to document the complaint will also be displayed in the **Entered**, **Sent By** and **Complaint Type** fields, located in the upper right hand corner of the screen. **Note:** The name of the employee logged into the system at the time the complaint was taken will appear in the **Sent By** field. If there are multiple unresolved complaints against the employee, or if you wish to review the way previous complaints were resolved, **Enter** the minus sign (The **(-) Pg Back** option from the lower screen menu) to scroll back and display any previous complaint(s). Repeated entry of the minus sign will take you to the beginning of the employee's complaint queue. Select the **Enter** key or **Carriage Return** (The **(CR) Pg Fwd** option from the lower screen menu), to scroll forward to the end of the complaint queue.

Alternatively, you can bring up a list of all messages in the selected message queue by entering the letter **L** to activate the (**L**)ist option from the lower screen menu. The system will list all complaints by the Employee Number in the case of complaints lodged against an employee, or by the Incident Number in the case of complaints lodged against a service call. The individual that entered the complaint, the date and time the complaint was entered, the Complaint Type Code used to document the complaint and a portion of the first line of the complaint description will also be displayed.

After the correct complaint entry has been found, you can edit the complaint documentation or add comments by **Entering** the letter **P** to select the A(**P**)end option from the lower screen

menu. The A(P)end option will reload the Complaint description into the Complaint Entry screen enabling you to make any changes. When you have finished editing, select the **F11** function key to exit the Complaint entry screen. Select **F11** again, or **Enter** the letter **F** to (F)ile any changes you make. When you have addressed the complaint and you are satisfied with the complaint documentation, **Enter** the letter **R** to select the (R)esolved option from the lower screen menu, and **Enter** the **Resolution Code** that best describes the manner in which the complaint was addressed. Select the **F2** function key for a selection list of Resolution Codes defined in your system.

After you have entered the Complaint Resolution Code, the system will stamp the complaint entry with the name and employee number of the employee who resolved the complaint, the time and date the complaint was resolved and the resolution code used to document the outcome of the complaint. Note: The *Fastrax* system documents the resolution of a complaint with the name and employee number of the employee who is logged into the system at the time the complaint is resolved. The **Resolution Code** and **Resolved** status will also appear in the upper right hand corner of the Employee/Incidents Complaints screen in the **Resolution** and **Status** fields. In cases where multiple attempts are required to resolve a complaint, you can select the (R)esolved option as many times as necessary to close the issue. The system will document each resolution attempt in the complaint documentation. Select the (S)end to Printer option to print a hard copy of the complaint document.

If the complaint must be transferred to another manager for resolution, you can update the name of the manager who addresses the complaint in the **Handled by** field by entering the number 1 ((#) to change option on the lower screen menu) and entering the new name in the **Handled by** field. The system will document each transfer of complaint resolution responsibility in the complaint description. To change the **Complaint Type Code**, **Enter** the number 2 for the (#) to change option to place the cursor in the **Complaint Type** field and enter the correct Complaint Type Code.

Once the complaint resolution has been documented to your satisfaction, select **F11** or enter the letter **F** to (F)ile the complaint resolution information. Select **F3** to exit the **Employee/ Incidents Complaints** screen and return to the **Employee Page Tracking** screen.

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9. Call Comments

The Call Comments feature is used to enter notes, call history or customer comments and complaints regarding a property or service call. An unlimited number of comments may be entered for each incident number. The number of comments entered for each incident will be displayed at the top of the screen when an incident is reviewed in the **Open/Review Service Call** screen. **Note:** Comments can be entered and/or reviewed directly from the Open/Review Service Call screen by loading the **Incident** information in the screen and selecting **Shift-F9** to go directly to the **Call Comments** screen (Press the Shift key and F9 key simultaneously).

9.1 Entering, Reviewing and Editing Service Call Comments

Note: The *Fastrax* system can be set to enter comments at the **Service Call** level, the **Property level**, or both. The comment level is set with the **Site/Call Comments** entry field found under the **Database Security** menu, **Main Control** option.

To enter comments or messages regarding a service call, select the **Call Comments** option from the **Dispatching** menu, if the comment is regarding the work performed at the service call, select the **Call Notes** option. If the comment is regarding the property the work was performed at, select the **Property Notes** option. **Note:** If the **Both** option is turned on, comment history is stored and retrieved under these categories for comment reviewing. The system will now display the **Site/Incident Comments** screen. **Enter** the **Incident Number** of the service call at the **Incident** prompt, or enter the customer's name to search for the Incident. You can also select the **F2** function key to search for the Incident with the **Customer Call Locator**. **Enter** the letter **A** to select the **(A)dd New Update** option from the lower screen menu to bring up the **Comments Entry** screen. After you have entered your comments, select the **F11** function key to **Exit** the Message Entry screen and file the comment. Select the **F3** function key to exit the Call Comments screen and return to the main **Dispatching** menu.

To **Review** comments or messages, select the **Call Comments** option and select the relevant **Call Notes** or **Property Notes** comment category. **Enter** the **Incident Number** of the service call at the Incident prompt. The system will display the last comment entered along with the customer information, call status, the date and time the comment was entered and the employee who entered the comment. If there are multiple comments for the Incident, **Enter** the minus sign (The **(-) Pg Back** on the lower screen menu) to scroll back and display any previous comment(s). Repeated entry of the minus sign will take you to the beginning of the comment queue. Select the **Enter** key or **Carriage Return** (The **(CR) Pg Fwd** option on the lower screen menu), to scroll forward to the end of the Comment Queue.

To **Edit** or **Update** a comment or message, locate and select the relevant comment entry as described in the above paragraph. **Enter** the letter **P** to select the **A(P)pend** option from the lower screen menu and bring the comment up in the **Comments Entry** screen.

After the editing/updating has been performed, select **F11** to **Exit** the Message Entry screen and file the comment.

9.2 Entering, Reviewing and Editing Service Call Complaints

To **Enter** a complaint regarding a service call Incident, select the **Call Comments** option from the **Dispatching** menu, select either the **Call Notes** option or the **Property Notes** option, both options store complaints in the same Incident Complaint queue. The system will now display the **Site/Incident Comments** screen. **Enter** the **Incident Number** of the service call at the **Incident** prompt, or enter the customer's name to search for the Incident. You can also select the **F2** function key to search for the Incident with the **Customer Call Locator**. **Enter** the letter **C** to select the **(C)omplaints** option from the lower screen menu to bring up the **Employee/Incident Complaints** screen. **Enter** the letter **A** to select **(A)dd Complaints** from the lower screen menu. Begin the complaint documentation by **Entering** the name of the employee who will address the complaint in the **Handled by** field and **Enter** the **Complaint Type Code** that best describes the complaint in the **Complaint Type** field. Select the **F2** function key for a selection list of Complaint Type Codes defined in your system. The system will now display the **Complaint Entry** screen. After you have entered the complaint description, select the **F11** function key to **Exit** the Complaints Entry screen and return to the **Site/Incident Comments** screen, select **F11** again, or enter the letter **F** to **(F)ile** the complaint. Select the **F3** function key to exit the Call Comments screen and return to the main **Dispatching** menu.

To **Review** Complaints attached to a service call Incident, select the **Call Comments** option and select the **Call Notes** or **Property Notes** comment category. **Enter** the **Incident Number** of the service call at the Incident prompt and **Enter** the letter **C** to select the **(C)omplaints** option from the lower screen menu. The system will display the last complaint entered along with the customer information, call **Status**, the **Date** and **Time** the complaint was entered and the employee who entered the complaint. If there are multiple complaints filed against the selected Incident, **Enter** the minus sign (The **(-) Pg Back** option on the lower screen menu) to scroll back and display any previous complaint(s). Repeated entry of the minus sign will take you to the beginning of the comment queue. Select the **Enter** key or **Carriage Return** (The **(CR) Pg Fwd** option on the lower screen menu), to scroll forward to the end of the Comment Queue.

To **Edit** or **Update** a complaint description, locate and select the relevant complaint entry as described in the above paragraph. Enter the letter **P** to select the **A(P)pend** option from the lower screen menu and bring the complaint up in the **Complaints Entry** screen. After the editing/updating has been performed, select **F11** to Exit the Complaint Entry screen and return to the **Site/Incidents Comments** screen. Select **F11** again, or Enter the letter **F** to **(F)ile** the complaint. Select **F3** to **Exit** the Employee/Incidents complaints screen and return to the Employee Page Tracking screen. Select **F3** a second time to return to the main Dispatching menu.

Note: Complaint entries attached to service calls can also be reviewed, edited or updated with the **Complaint Queue** option on the **Dispatching** menu. Complaints attached to service calls will appear in the Complaint Queue screen with the customer name included with the Complaint entry details. Please refer to **Section 13** of the **Dispatch** module documentation for a complete discussion of the **Complaint Queue** option.

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10. Overdue Calls

When a call is getting near its scheduled time and has not been dispatched, it will be placed in the **Overdue Call** queue. The calls can be listed by the name of the employee who took the call, calls taken by all employees or by sector. Once the calls are listed, you can assign or reassign the call, give the customer a courtesy call to let them know the technician will be a little later than expected, or reschedule the call. The number of Overdue calls will appear in the lower left hand corner of the Main Menu screen.

10.1 Reviewing, Assigning and Rescheduling

To **review** overdue service calls, select the **Overdue Calls** option from the **Dispatching** menu to display the **Overdue Calls** screen. Enter the name or employee number of the employee that has taken the service call, or enter the **Sector Number** corresponding to the area the overdue call is located in at the **Employee/Sector** prompt. Select **F2** for a list of Sectors defined in your system. You can also enter **All** in the Employee/Sector field to review Overdue Calls taken by all employees. The system will display a list of all Overdue Calls corresponding to the information entered. Each call is listed with the company responsible for the call, customer name and telephone number, the scheduled date and time, the dispatch status and the name of the technician assigned or dispatched to the service call. To review Overdue calls for another employee or Sector, Enter the letter **N** to select the **(N)ext** option from the lower screen menu and enter the new employee or Sector in the Employee/Sector field.

To **assign** or **reassign** a service call, **Enter** the **Sequence Number** of the call (The **(#)** to **Assign** option on the lower screen menu). The system will display the technician Assignment queue enabling you to assign a technician to the call, or reassign another technician if the call has been previously assigned.

To **reschedule** a call, enter the letter **S** and the **Sequence Number** of the call (The **(S#)** to **Reschedule** option from the lower screen menu) and **Enter** the new schedule **Date** and/or **Time** at the Date and Time prompts.

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11. Lost Call Review

When a call is lost or cancelled, the dispatcher must give a reason why it is being cancelled by entering a **Cancel Code**. It will then be placed in the **Lost Call queue** for review. When the **Lost Call Review** option is selected, a list of lost calls will be displayed along with customer information, and the reason the call was not addressed. This gives you the opportunity to resolve the reason for the lost call and get the customers business back for your company.

11.1 Reviewing, Opening and Deleting Lost Calls

To review and/or address **Lost Calls**, select the **Lost Call Review** option from the **Dispatching** menu and enter the **Sector Number** corresponding to the service area you wish to review. The system will display the **Review Lost Calls** screen and list all lost or cancelled calls. Each call is listed with the following information: **Incident Number**, the **Company** the call was logged under, the **Customer Name** and **Telephone Number**, the **Time** the call was scheduled, the **Problem Code** the call was logged under, the **Employee Number** of the employee who cancelled the call and the **Reason** for cancellation. Select and **Enter** the **Sequence Number** of the Cancelled call you wish to review to display the customer information in the **Lost Call Review screen** (The **Seq (#) option** from the lower screen menu). To review calls in other sectors defined in your system, Enter the letter **N** or **B** to select the **(N)ext Sector**, or **(B)ack Sector** options from the lower screen menu, select the **Enter** key to scroll through all Sectors until additional calls are listed.

Once the Cancelled call information is loaded into the **Lost Call Review screen** the following options are available to assist you in addressing the reason for the cancellation with the customer and attempting to regain the lost business:

Call Comments – Select **Shift-F9** (Press the Shift and F9 keys simultaneously) to bring up the Call Comments option and review any notes entered or complaints documented regarding the reason for cancellation.

(O)pen Call – When the issue resulting in the cancellation has been resolved, select the **(O)pen** option to reopen the service call. To update any of the customer information taken during the original call, **Enter** the line number of the item you need to change to place the cursor in that field (The **(#) to Change** option from the lower screen menu). After the update has been performed, select **F11** or **Enter** the letter **F** to **(F)ile** the update. After the call has been reopened, it will be available for Assignment and Dispatch.

(D)elele – If the issue resulting in the call cancellation cannot be resolved, **Enter** the letter **D** to select the **(D)elele** option from the lower screen menu and **Enter** the **Cancellation Code** at the **Cancel Reason Code** prompt.

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12. Where Are They

The **Where Are They** option is an information screen used to determine the location of your technicians by **Sector**, their **Available/Unavailable** status, if they are dispatched and, if dispatched, the date and time of dispatch. Since the technician location is listed by Sector, the Where Are They function is very useful to determine if you have a technician in the area of a specific service call. The Where Are They option also enables you to assign a technician to a service call in a **Helper** status. **Note:** The Where Are They function lists information only for technicians currently on duty.

To determine the location and dispatch status of technicians currently scheduled for duty, select the **Where Are They** function from the **Dispatch** menu and **Enter** the word **ALL** at the **Sector** prompt. This will bring up a list of all technicians in all areas scheduled for duty at that time. To view technician information in a specific location, **Enter** the Sector Number corresponding to the location at the Sector prompt, or select the **F2** function key for a selection list of the Sectors defined in your system. To cycle through all Sectors defined in your system, **Enter** the letter **N** to select the **(N)ext** option from the lower screen menu, each time you enter the letter N, the next sector and the corresponding technician information will display.

The Where Are They screen lists each technician's Employee Number and Name, regardless of dispatch status. If the technician is dispatched, the technician's job **Location** (customer name), **Dispatch Date** and **Time** and the **City** they are dispatched to will be listed. If the technician is not dispatched, they are listed as **Available** and the city they live in will be listed. Select the **(S)chedule** option to view the schedule for all technicians in the current sector. Select the letter **N** to view the schedule for the **(N)ext** day, or select the letter **B** for **(B)ack** day to view the previous days schedule. The time slots that correspond to previously scheduled calls will be marked with an asterisk.

To assign a technician to a service call as a helper, **Enter** the letter **H** and the Sequence Number of the technician you are assigning (the **(H#)elper** function from the lower screen menu), and. Enter the **Incident Number** of the job they are being assigned to.

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13. Complaint Queue

When a complaint is entered against a service call or individual employee and it is given to a manager to resolve, the **Complaint Queue** enables a manager to review, edit, document the resolution of a complaint and add additional complaints. When a manager logs onto the system the number of complaints assigned to him will be displayed in the lower left corner of the Main Menu.

13.1 Reviewing Assigned Complaints

To review assigned complaints, select the **Complaint Queue** option from the **Dispatching** menu and enter the name or employee number of the manager assigned to handle the complaints. The system will display a list of complaints with the following information: **1) Employee Number** or the **Incident Number** the complaint was lodged against. In the case of employee complaints, the employee number and the number of complaints the employee has received will be displayed, in the case of complaints against a service call or property, the **Incident Number** of the service call will be displayed. **2)** In the case of complaints against a service call or property, the **Name** of the property owner will be displayed in the name field, in the case of employee complaints the **Name** field is left blank. **3)** The **Date** and **Time** the complaint was logged. **4)** The **Status** of the complaint. In the case of complaints against a service call, the status of the service call will be displayed, i.e., Assigned, Dispatched, Approved, etc. In the case of **Unresolved** complaints against employees, the **Status field** will be blank. In the case of complaints against employees that have been previously resolved through the **Page Tracking** option, the **Resolved** status will be displayed. **5)** The **Complaint Type Code** used to describe the complaint.

Select and **Enter** the **Sequence Number** of the complaint you wish to review (The **(#)** to **View** option from the lower screen menu) to display the selected complaint documentation. If there are multiple unresolved complaints against the employee, prior to or after the selected complaint, **Enter** the minus sign (The **(-)** **Pg Back** option from the lower screen menu) to scroll back and display any previous complaint(s). Repeated entry of the minus sign will take you to the beginning of the employee's complaint queue. Select the **Enter/Carriage Return** (The **(CR)** **Pg Fwd** option from the lower screen menu), to scroll forward to the end of the complaint Queue. To review the **Complaint Queue** for another manager, **Enter** the letter **N** to select the **(N)ext Employee** option from the lower screen menu and **Enter** the manager's name or employee number at the Employee prompt.

13.2 Adding Complaint Documentation

To add an additional complaint against an employee or service call, select and **Enter** the **Sequence Number** of the complaint entry to display the complaint in the **Employee/Incidents Complaints** screen. **Enter** the letter **A** to select **(A)dd Complaints** from the lower screen menu and **Enter** the employee number or name of the manager who will address the complaint in the **Handled by** field. **Enter** the **Complaint Type Code** that best describes the complaint in the **Complaint Type** field, or select the **F2**

function key for a list of Complaint Type Codes defined in your system. The system will now display the **Complaint Entry** screen enabling you to enter a description of the complaint. After you finish with a line, select **Enter** for a new line, or to insert a blank line between paragraphs. If you need to clear a line, or a portion of a line, place the cursor at the point from which you wish to clear and select **Control E** (Press the **Ctrl** and letter **E** keys simultaneously) to clear all characters from the point of cursor placement to the end of the selected line. After you have entered the complaint description, select the **F11** function key to **Exit** the Complaint Entry screen and return to the Employee/Incidents Complaints screen. Select **F11** again, or the letter **F** to **(F)ile** the complaint.

13.3 Editing and Updating Complaints

To **Edit** and/or **Update** the Complaint description after you have exited the **Complaint Entry screen**, but have not saved the description (Selecting **F11** one time only), **Enter** the letter **S** and the line number of the line you wish to edit, ((**S#**)eq from the lower screen menu). The (**S#**)eq command will reload the complaint description in the Complaint Entry screen enabling you to perform any necessary editing or updating. If you need to delete one or more lines from the complaint description, **Enter** the letter **D** and the line number you wish to delete (The (**D#**)elete function from the lower screen menu). Select the **F11** function key to **Exit** the Complaint Entry screen and return to the Employee/Incidents Complaints screen. Select **F11** again, or the letter **F** to **(F)ile** the complaint.

To **Edit** and/or **Update** a Complaint description after it has been filed to history, select the complaint from the **Complaint Queue** to display the complaint documentation in the **Employee/Incidents Complaints** screen. **Enter** the letter **P** to select the **A(P)pend** option from the lower screen menu. The **A(P)pend** option will reload the Complaint description into the **Complaint Entry screen** enabling you to make any changes. When all editing/updating has been performed, select the **F11** function key to exit the Complaint entry screen. Select **F11** again, or **Enter** the letter **F** to **(F)ile** any changes you make.

13.4 Customer Complaint Resolution

To resolve a customer complaint with the **Complaint Queue** option, select and **Enter** the **Sequence Number** of the complaint entry to display the complaint in the **Employee/Incidents Complaints** screen. The complaint documentation will be displayed along with the date and time the complaint was entered. In the case of complaints lodged against employees, the time and date the complaint was entered, the name of the employee that entered the complaint and the **Complaint Type Code** used to document the complaint will also be displayed in the **Entered**, **Sent By** and **Complaint Type** fields, located in the upper right hand corner of the screen. **Note:** The name of the employee logged onto the system at the time the complaint was taken will appear in the **Sent By** field. In the case of complaints lodged against a service call, the customer information and Incident Number will also be displayed. If multiple complaints have been lodged against the employee or service call and you wish to review the complaint

history, **Enter** the minus sign (The (-) **Pg Back** option from the lower screen menu) to scroll back and display any previous complaint(s). Repeated entry of the minus sign will take you to the beginning of the employee's complaint queue. Select the **Enter/Carriage Return** (The (CR) **Pg Fwd** option from the lower screen menu), to scroll forward to the end of the complaint Queue.

After the correct complaint entry has been found, you can edit the complaint documentation or add comments by **Entering** the letter **P** to select the A(**P**)end option from the lower screen menu. The A(**P**)end option will reload the Complaint description into the Complaint Entry screen enabling you to make any changes. When you have finished editing, select **F11** to exit the Complaint entry screen. Select **F11** again, or **Enter** the letter **F** to (**F**)ile any changes you make. When you have addressed the complaint and you are satisfied with the complaint documentation, **Enter** the letter **R** to select the (**R**)esolved option from the lower screen menu, and **Enter** the **Resolution Code** that best describes the manner in which the complaint was addressed. Select **F2** for a list of Resolution Codes defined in your system.

After you have entered the **Complaint Resolution Code**, the system will stamp the complaint entry with the name and employee number of the employee who resolved the complaint, the time and date the complaint was resolved and resolution code used to document the outcome of the complaint. **Note:** The system documents the complaint resolution with the name of the employee who is logged into the system at the time the complaint is resolved. The **Complaint Resolution Code** and **Resolved** status will also appear in the upper right hand corner of the Employee/Incidents Complaints screen in the **Resolution** and **Status** fields. In cases where multiple attempts are required to resolve a complaint, you can select the (**R**)esolved option as many times as necessary to close the issue. The system will document each resolution attempt in the complaint documentation.

If you need to update the name of the employee who addressed the complaint, you can change the name in the **Handled by** field by entering the number 1 ((#) **to change** option on the lower screen menu) and entering the new name in the Handled by field. **Note:** the system documents the complaint resolution with the name of the employee who is logged into the system. Therefore, the name in the Handled by field should be the same as the name of the individual logged into the system. To change the **Complaint Type Code**, Enter the number 2 for the (#) to change option to place the cursor in the Complaint Type field and enter the correct Complaint Code.

Once the complaint resolution has been documented to your satisfaction, select **F11** or enter the letter **F** to (**F**)ile the complaint resolution information. After the complaint has been resolved and filed, it will no longer appear in the managers Complaint Queue. To review complaint history for employees with no current complaints, select the **Page Tracking** option from the Dispatching menu and enter the relevant employee number and select the (**C**)omplaints option from the lower screen menu. Please refer to **Section 8** of

the **Dispatch** module documentation for a complete discussion of the **Page Tracking** option.

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14. Survey Queue

If customer surveys are set-up in the *Fastrax* system, the **Survey Queue** will list all the calls selected to be surveyed. Survey format, criteria and questions are defined with the **Survey functions** on the **Utility** option on the **Main Menu**. Calls are placed in the survey queue as they meet the criteria set-up in the survey definition, and each survey type is assigned to a specific employee. The number of surveys needing to be addressed by an employee will be displayed in the lower left hand corner of the Main Menu screen.

14.1 Survey Question Definition

To create a new customer survey, begin by composing the questions you will ask for the survey by selecting the **Survey Questions** option from the **Utility** menu located on the *Fastrax* **Main Menu**. This will display the **Questions Update** screen. Enter an **ID** for the set of survey questions at the **Enter Survey Id** prompt, the ID can be alpha, numeric or alpha numeric. The set of questions included in the survey will be identified and selected for survey format definition and editing by the ID number you **Enter**. Enter the **Survey Name** or **Description** for the set of survey questions. **Enter** a question Heading in the **Heading** field and **Enter** the question itself in the **Question** field. Next, **Enter** the question answer format in the **Type** field, choices for the Type field are **Y/N** and **Text**. Complete the question composition by **Entering** the number of characters allowed for the answer in the **Len** field. **Example:** A question dealing with customer satisfaction could have Satisfaction in the Heading field, the answer Type would be Y/N and the number of characters in the Len field would be one. A question requiring a detailed answer would have Text in the Type field and the number of characters necessary to answer the question in the Len field. Continue composing the questions for the survey by selecting **Enter** to advance the cursor to the next line. After all the survey questions have been composed and entered, select the **F11** function key to **Exit** the **Questions Update** screen and **Save** the survey questions. The screen will now display the **Enter Survey Id** prompt to facilitate the creation of the next set of survey questions. Select the **F3** function key to **Exit** the Questions Update screen and return to the **Utility** menu.

14.2 Survey Format Definition

After you have composed the questions for a survey, select **Survey Format** from the **Utility** menu and **Enter** an **ID** for the survey at the **Enter Survey Key** prompt, the ID can be alpha, numeric or alpha numeric. **Enter** the employee number of the employee who will be responsible for the survey in the **Survey Performed By** field and **Enter** the ID for the set of survey questions to be used for the survey in the **Question Number** field. If you wish customer selection criteria for the survey to be based on the number of hours spent on the job and a revenue cut-off value, **Enter** the time spent on the job cut-off value in the **More Than Hour** field and the revenue cut-off value in the **Less Than Revenue** field. If you want the customer selection for the survey to be based on **Cancelled** or **Closed** service calls, **Enter** a **Yes** or **No** flag in the appropriate **Cancelled/Closed** criteria field. After the **Survey Format** has been defined and entered, select **F11** to **Exit** the **Questions Update** screen and **Save** the survey. The screen will now display the **Enter Survey Key** prompt to facilitate the definition of the next survey. Select **F3** to **Exit** the Survey screen and return to the **Utility** menu.

14.3 Conducting a Survey

When an employee that has been assigned to a survey logs into the *Fastrax* system, the number of customers that meet the survey requirements will be displayed in the lower left hand corner of the Main Menu screen. To conduct a survey, select the **Survey Queue** option from the **Dispatch** menu and enter your Employee Number at the **Employee** prompt. The system will display a list of all calls meeting the survey criteria by Incident Number, customer name, customer telephone number and the number of attempts made to contact the customer. Enter the **Sequence Number** of the customer you wish to contact ((#) **to Survey** on the lower screen menu) to bring up the survey question and answer entry screen. Enter each answer in the appropriate **Y/N** or **Text** format. To change the response to a question after the survey is complete, enter the question number in the **Rep** field located in the lower left hand corner of the Survey Que and enter the correct response ((#) **to Change** option from the lower screen menu). After the survey is complete, select the **F11** function key to file the survey results.

14.4 Reviewing Survey Results

Select the **Survey Report** from the **Utility** menu located on the *Fastrax* main menu and enter the **Survey ID Number** at the **Survey ID** prompt. **Enter** the letter **I** at the **Text Questions** prompt to Include text questions in the report, or **Enter** the letter **E** to Exclude text questions. Enter the date range of the surveys you want included in the report and select the printer option as either printer or terminal.

Lower menu options on the Survey Que screen:

(N)ext Employee – Select the (N)ext **Employee** option to enter another employee number and review and/or address any assigned surveys. Enter the letter **N** in the **Rep** field located in the lower left hand corner of the Survey Que screen and Enter the next employee's name or employee number.

(#) to Survey – The **(#) to Survey** option is used to select a customer for survey, enter the Sequence number of the designated customer in the **Rep** field to display the survey questions and response entry fields for that customer.

(S###)earch – To survey a customer that is not on the survey list, **Enter** the letter **S** and the Incident Number of the service call corresponding to the customer you wish to survey. The **(S###)earch** function will load the customer information into the survey screen and display the survey questions.

(D#)elete – Select the **(D#)elete** option to remove a customer from the survey list, Enter the letter **D** and the **Sequence Number** of the call you wish to delete.

Lower menu options on the Survey Que questions screen:

(#) to Change – Select the **(#) to Change** option to change the response to a given question. Enter the question number in the **Rep** field and enter the correct response.

(A)udit – Select the **(A)udit** option to review a complete history of all actions that have taken place for the service call along with the employee responsible for each action.

(N)o Response – Select the **(N)o Response** option to document the attempt to contact a customer for the survey.

(C)ancel – Select the **(C)ancel** option to remove the survey results from all subsequent Survey Reports.

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15. PM's Due

Select the PM's option to review the number of preventive maintenance contracts that are due to be serviced and to generate reminder letters, service calls and review the customer information.

Options available on the PM's Due screen:

(V#)iew Site – Enter the letter **V** and the PM Sequence Number to review the customer information for the maintenance contract.

(G#)enerate Call – Enter the letter **G** and the PM Sequence Number to generate a call to the customer.

(L#)etter – Enter the letter **L** and the PM Sequence Number to generate a letter to the customer.

(C#)omments – Enter the letter **C** and the PM Sequence Number to enter comment regarding the maintenance contract.

(N#)o Answer – Enter the letter **N** and the PM Sequence Number to document unsuccessful attempts at contacting the customer.

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