

# Live Dispatch from the Schedule Board

Last Modified on 01/11/2023 3:37 pm EST

This Dispatching method is used If your Technicians call-in, email or text the office as they are arriving and departing from appointments throughout the day. An office staff member will mark the dispatch times as the information is received from the Technicians.

## Dispatch the Technician to the Appointment

Once it is known the Technician is on the way to the appointment, within the Schedule Board, click once on the Ticket Appointment, then in the Ticket Detail Viewer, click on the blue button to the right of the Dispatched Date/Time area. On the Ticket Detail Viewer, the exact date and time it is when clicking the blue button will populate the Dispatched fields. The background color of the Appointment on the Schedule Board will change to Blue.

□

## Arrive the Technician to the Appointment

Once it is known the Technician has arrived at the appointment, within the Schedule Board, click once on the Ticket Appointment, then in the Ticket Detail Viewer, click on the green button to the right of the Arrived Date/Time area. On the Ticket Detail Viewer, the exact date and time it is when clicking the green button will populate the Arrived fields. The background color of the Appointment on the Schedule Board will change to Green.

□

## Depart the Technician from the Appointment

Once it is known the Technician has finished the appointment, within the Schedule Board, click once on the Ticket Appointment, then in the Ticket Detail Viewer, click on the red button to the right of the Departed Date/Time area. On the Ticket Detail Viewer, the exact date and time it is when clicking the red button will populate the Departed fields. The background color of the Appointment on the Schedule Board will change to Red.

There is a slight change in the process if at the end of the appointment, the Technician is providing information as to how the ticket was resolved and you want to type in this information immediately. To use this process, continue on below. Instead of clicking on the Red Departed button, double-click on the appointment within the Schedule Board

□

## Depart the Technician from the Appointment & Enter Resolution Code and Notes.

To enter Departure information, a Resolution Code and Notes for the Appointment, from the Schedule Board, click once on the Ticket Appointment, then in the Ticket Detail Viewer, click on the Edit button.

The Ticket Dispatch form will be displayed.

- In the Departed Time field, enter the time (you do not need to enter the date, this will default in for you).
- In the Resolution code field, make a selection from the drop-down list.
- In the Notes field, type in pertinent information provided by the Technician.
- Resolves Ticket/Needs Go-Back; you must check one of these boxes.

If this completes the work on the Ticket, check the Resolves Ticket option. If a return visit is required to complete the work, check the Needs Go-Back option.

When finished, click the Save button at the bottom of the Ticket Dispatch form.

If the Resolves Ticket checkbox was selected, on the Schedule Board, the background color of the appointment will change to Gray. If the Needs Go-Back checkbox was selected, the background color of the appointment will change to Orange.

□