



## Graphical Schedule Board

Efficiently routing your service team allows you to maximize profitability while delivering improved customer service, but maintaining schedules for multiple technicians can be a daunting task. The WennSoft Graphical Schedule Board allows your dispatchers to easily sort, filter and schedule appointments and jobs using a visual representation of scheduled service; including assigned, unassigned and unscheduled appointments.

### Functionality

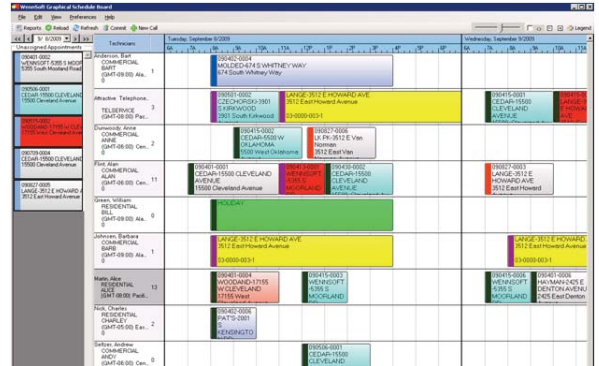
- **Create New Service Calls** – Users have the ability to create new service call appointments that can be sent back to the host system for processing.
- **Service Appointment Update** – Modify the appointment (date, start time, duration, Technician ID or appointment status) from the details window by double-clicking the assigned, unassigned or unscheduled appointment record or using the select button in the context menu.
- **Technician Paging** – User can generate an email or an alphanumeric page containing a single appointment using the context menu item.
- **Technician Broadcasting** – User can broadcast a call to a technician's mobile device using the context menu item.
- **Appointment Allocations** – User can remove the appointment allocation from a single appointment or all appointments for a technician. The appointment(s) will be reassigned to the unassigned technician and status set to a user-defined status value.
- **Technician Activities Update** – Users have the ability to modify the date, start time, activity type or duration of an existing technician activity.
- **Update Job Activities Update** – Modify the date, start time, job number, cost code or duration of an existing job activity.
- **Zoom to service call or job** - (requires Microsoft Dynamics GP to be open) Zoom directly to a service call (for service appointments) or job (for job appointments) to job status window for open jobs and job history for closed jobs in the host SMS or Job Cost system.
- **Retain schedule board view settings** - When a user changes schedule board view settings like the filter, sorting or appointment grid sizing then exits the application, those settings will be retained the next time they log in.
- **Multiple (including double) booking** - (10.OEX users only) – Appointments can now overlap on the schedule board if double-booking is allowed on the host system.
- **Create new technician activities** - Users can create new technician activities, for example, for sick days, jury duty, training, and so on. These can be sent back to the host system for processing.
- **Create new job appointments** - User can create new job appointments. These appointments are associated with a job number and cost code.
- **Enhanced lookups when creating a service call** - Sort the lookup by column. In addition, include/exclude inactive customer or locations, and bill only customer or locations.
- **Create additional appointments** - Users may now make a copy of an existing scheduled appointment to create an additional appointment for that service call, job or technician activity
- **Print work orders** - (service appointments only) –The GSB user may now print work orders directly from the schedule board. Three types of work orders are available by default:
  - Work Order
  - Work Order with Appointments
  - Work Order with Tasks
- **Create notes** - New notes can now be created for customers, locations, and service calls (including mobile and resolution notes).
- **Enter actual hours** - Once an appointment has been completed, users can enter the actual hours that it took to finish the appointment. Actual hours will then drive the bar length on the schedule board.
- **Restore label and color settings to system default** – You now have the ability to save the current label and color setting as the system default. This provides the ability to automatically default these settings for any new user or to revert to the default setting if a user is not satisfied.
- **Assign read-only status to selected users** - Supervisors can limit which users can change or manipulate appointments and those who can only view the schedule board. For the latter, a user would be set up as a read-only user.
- **Sort technician column by technician team** - In addition to sorting by skill level, branch, technician name or short name, sorting by technician team is now an option.



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## View

- **Service calls are represented by color-coded bars.** User-defined settings allow you to select the background color of an appointment based on call type, problem type or service area and appointment status. Filter the display by
  - Technician
  - Technician service area
  - Call status
  - Location
  - Call priority
  - Customer
- **Further filter the display to view one or all affiliates, regions or branches at a time.**
- **Unassigned and unscheduled elements appear in a separate display area** - Drag and drop functionality allows the user to convert an appointment from unassigned or unscheduled to scheduled or to drag and drop the appointment to a new date or technician.
- **View all of the following in one window** - GSB allows you to see all appointment types in one view: service appointments, technician activities and job activities.



- **Display one-, three- or five-day views for the selected technician, vendor or staff** - The user can change the view by adding or subtracting days, up to a maximum of 90 days.
- **View all of the data defined for the appointment bar by hovering over the appointment** - Hovering over any appointment in the grid will open the 'mouse-over' window, which contains all data elements selected in setup, as well as those elements which display by default on the appointment bar.

## User-Defined Configuration

- **WennSoft Service Management scheduling constraints and validation rules** are automatically enforced.
- **Attributes including data caching, auto-save, color coding and major/minor time scale** - for each view can be configured, allowing you to create a customized view specific to your needs.
- **General and preference setups** are divided into items that are configured globally for all users and those that can be customized by user.
- **Appointment changes can be cached**, allowing users to accumulate appointment changes prior to saving and committing to the database.
- **When using the cached approach, the database status indicator displays one of three states** - no change in the database or GSB, change in GSB but not the database or change in the database but not GSB. Reload will reset the database state indicator to the default state.
- **Auto-Refresh** – Define intervals to automate auto-refresh, which repopulates GSB so that appointments created and/or edited by other users are displayed.
- **Auto-Save** – Define intervals for automatic saving of cached changes or prompt users to save cached changes. You may suppress the auto- save feature.
- **Auto-Reload** – This feature allows the user to clear all unsaved/cached changes and repopulate GSB with all appointments.
- **Technician Over-Allocation** – Change the background color of the technician name block to red when a technician is over-allocated (assigned more work hours than his/her shift hours plus allowed overtime hours). This feature is available with our Premier platform only.
- **Service Appointment, Technician Activity and Job Activity Bar Data** – Choose the data that displays on the appointment bar. This data can come from Appointment, Customer, Location, Service Call, etc.
- **Define standard work hours and days of the week** - Defines standard work hours and days of the week to be displayed in the appointment scheduling grid.



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### Reporting

- One-, five- and seven-day or monthly schedules-at-a-glance can be printed.
- Users can print a schedule of appointments, technician activities or job appointments by technician or vendor.

### Configuration/Implementation Requirements

- The GSB application will be locally installed as a stand-alone application for each dispatcher.
- The GSB installation will install Web Services on the web server indicated by the installing user.
- GSB requires the user to select one or more valid companies (Microsoft® SQL™ Server databases) from the Microsoft Dynamics® GP company table.
- Each GSB user must also be a WennSoft Service Management Series user as that user profile will determine the data each dispatcher can access.
- The GSB installation will create tables in each company for which it's installed. These tables will be used to house the setup parameters as defined by the initial setup of the application. These tables will also store user-specific preference settings.



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