WennSoft

Schedule

Schedule User Guide

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Table of Contents

Overview

When you log into Schedule, service appointments, job appointments, and technician activities are loaded onto the schedule board. Schedule lets dispatchers easily schedule appointments by using a visual representation of service that includes assigned, unassigned, and unscheduled appointments.

To access Schedule's full capability, we recommend Google Chrome[1] or other non-Microsoft browsers for your internet browser. Microsoft browsers may still be able to access Schedule but you may not have access to all features.

> **Important:** If you intend to use Job Appointments and you also use TimeZone views in Service Management, your users must use the Signature Alternate Dynamics versions of the Customer Maintenance, Customer Address Maintenance, and Customer Class setup windows. These windows contain information that is specifically used by Signature during the appointment scheduling process.

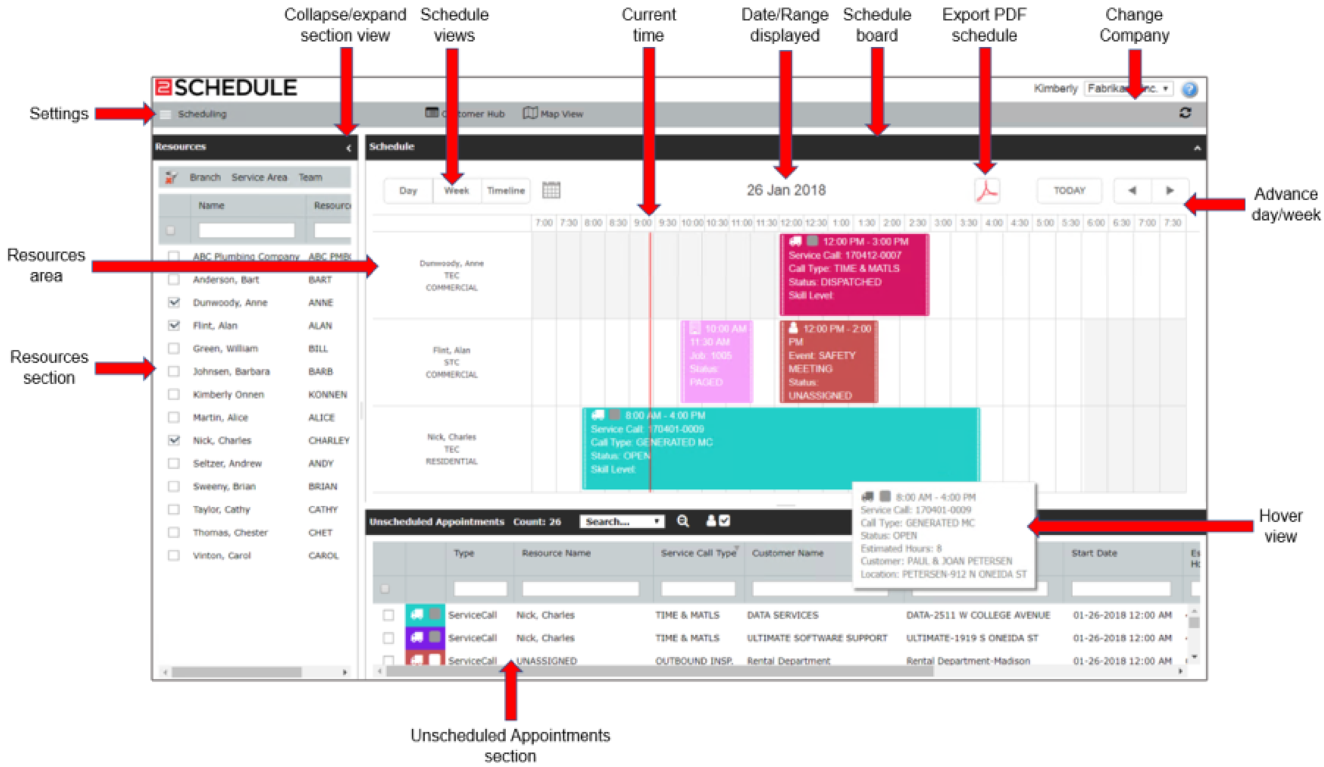
Users can complete these types of activities:

- Service appointment updates
- Technician notifications
- Appointment allocations
- Technician activities updates
- Job activities updates
- Create service calls
- Create notes
- Create service appointments
- Create job appointments
- Create technician activity
- Add attachments

Viewing the schedule board

When you open Schedule, the service appointments, job appointments, and resource activities are loaded onto the schedule board.

1 https://www.google.com/chrome/



Appointments and appointment types

Schedule displays these types of appointments that are created by using Service Management and/or Schedule. Color coding indicates the appointment status per the color configuration in Schedule Settings.

> ⚠ **Important:** If you intend to use Job Appointments and you also use TimeZone views in Service Management, your users must use the Signature Alternate Dynamics versions of the Customer Maintenance, Customer Address Maintenance, and Customer Class setup windows. These windows contain information that is specifically used by Signature during the appointment scheduling process.

Appointment type	Where it is created
Service appointments	• From service calls in Service Management. • From MobileTech • From service calls created in the Schedule Customer Hub. • From the Appointment Wizard in Schedule. • From the schedule board in Schedule.
Job appointments	• Using the Job Maintenance window in Job Cost. • Using the Appointment Wizard in Service Management. • From MobileTech • From the schedule board in Schedule. • From the Appointment Wizard in Schedule.

Appointment type	Where it is created
Resource activities	• Using the Technician Entry Activity Wizard in Service Management. • Using the Appointment Wizard in Schedule. • From the schedule board in Schedule.

Context-sensitive menus

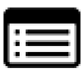
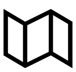
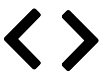
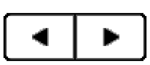
The schedule board allows you to right-click on job/service appointments, resource activities, and resources, to access menus with common tasks that you may need to do. If you do not have access to an appointment type, you will not see this information.

Action	Source
Set Status: Set or update the appointment or activity status.	• Job appointment • Service appointment • Resource activity
Unschedule Appointment: The appointment time is set to 12:00 AM. The appointment is moved from the schedule board to the Unscheduled Appointments section.	• Job appointment • Service appointment • Resource activity
Unassign Appointment : The Resource field is updated to UNASSIGNED. The appointment is moved from the schedule board to the Unscheduled Appointments section.	• Job appointment • Service appointment
View Job Details : Opens a display-only view of the job details with tabs for the cost codes and subcontractors.	• Job appointment
Open Service Call : Opens a window populated with the service call information. If a piece of equipment needs to be added, you can do so here.	• Service appointment
Quick Print : Opens the Work Order SRS report with the service call details displayed.	• Service appointment
Print Service Call: Provides the opportunity to print service call information.	• Service appointment
Appointment Wizard : Opens the appointment wizard.	• Job appointment • Service appointment • Resource activity • Resource

Action	Source
Create New Appointment : Opens the New Appointment/Activity window to create a new appointment based on the current appointment.	• Job appointment • Service appointment • Resource activity
Add New Appointment Note : Adds a note to the service appointment.	• Service appointment
View Customer Details: Opens the Customer Hub with the customer/ location highlighted and the information displayed in the details section.	• Job appointment • Service appointment
View Location Details : Opens the Customer Hub with the customer/ location highlighted and the information displayed in the details section.	• Job appointment • Service appointment
New Resource Activity : Opens the New Resource Activity window with resource information in the Resource field.	• Resource
Print Resource Schedule • **Schedule Resource Report** : Prints the technician's schedule for the day. • **Report Wizard**Opens the Resource Schedule Report wizard. You can choose the report to print, a date range, who the report is run for, as well as for which technician(s).	• Resource
Unschedule All : Unschedules all appointments for the resource. The time is set to 12:00 AM. Appointments move from the schedule board to the Unscheduled Appointments list.	• Resource
Unassign All : Unassigns all appointments for the resource. The resource is set to UNASSIGNED. Appointments move from the schedule board to the Unscheduled Appointments list.	• Resource

Icons and buttons

Icon or button	Description
	Displays or hides the navigation pane.
	Refreshes the schedule board.

Icon or button	Description
	Indicates a service appointment.
	Indicates a job appointment.
	Indicates a resource appointment.
	Show All Resources in Unscheduled Appointments.
	Choose to open the Customer Hub (in a separate browser window).
	Choose to open the Map and Route Resources window.
	Direction arrows to open/collapse section. The arrows point in the direction that the window will open/collapse.
	Direction arrows to open/collapse section. The arrows point in the direction that the window will open/collapse.
	Choose to select a specific date to display on the schedule.
	Moves the schedule forward or back by one day.
	Choose to print a service call quick print.
	Indicates that the service call has no attachments. Choose this to open the Add Attachment window.
	Indicates an attachment is available. Choose this to open the Attachments window.
	Indicates that the service call or appointment has no notes added. Choose this to add a note.

Icon or button	Description
	Indicates that the service call or appointment has at least one attached note. Choose this to open the Notes window.

Setting up Schedule

Schedule settings can only be accessed by users with Administrator rights.

Administration setup

With Schedule, you can create users and assign each user to a role. The users are mapped to their corresponding user login in Signature.
Complete the following setup options:

Processing requests

- **Reset resource location to home location**: At the end of the work day, the technician's location is at the last appointment for the day. Choosing this option resets the starting locations for all resources as set up on the Resource Options tab. You can set this up as a scheduled task to automatically run the reset.
- **Get latitude and longitude for service locations**: Choose this to get the latitude and longitude for service locations. This will not overwrite any previously-entered values. If you do not have a Bing or Google API key, you will be limited to 2500 records per day.
- **Copy Company Settings**: If you have more than one company, you can copy the configuration and color settings to another company.

  > ⚠ The form field setup options are not copied.

Setting up users

When logging in for the first time in Schedule, the administrator needs to create their user profile by completing the **Detail** section as well as the User Roles section.

> ⚠ **IMPORTANT**

Before setting up users in Schedule, verify that the user has an SMS User Profile in Service Management. For more information, see *Setting Up Security* in the Signature Service Management User Guide.

To set up users:

1. Access **Schedule** from the URL link that was provided to you during setup.
2. Use the predefined *username* and *password* that was provided to you.
3. Choose the *Menu* ≡ button in the top left corner next to Scheduling.
4. Choose **Administration**.
5. Choose the **User Detail** tab.
6. In the Users section, choose + *New User.*
7. In the Detail section, enter the user information in the **Detail** section.
    - **User Name**: This is the username that is used to log into Schedule.
    - **First/Last Name**: Enter a first and last name.
    - **Email Address**: Enter an email address.
    - **Time Zone**: Choose the time zone
    - **ERP User ID**: From the drop-down, choose the username that is used in Microsoft Dynamics GP for the user.
    - **Default Company**: Choose the default company. This is the company that will display, but you are able to change the company. See [Changing companies for more information.
    - **Disabled**: This checkbox is used to disable user.
    - **Password/Confirm Password**: Enter the password to use for logging into Schedule. Re-enter the password in the **Confirm Password** field.
8. Choose *Save*.
9. The user will be added to the *Users* section.

Working with roles

Schedule has two pre-defined roles that cannot be disabled, *Administrator* and *Dispatcher*. You can create additional roles for your users, but a user can only be assigned to one role.
The User Roles window has three sections.

- **Roles**: Displays the user roles. You can use the filter fields to narrow the listing of roles by entering a few letters for role and/or description.This section also contains the *New Role* and *Copy Role* buttons.
- **Role Detail**: This section is used to create and/or disable a role.
- **Role Permissions**: You can assign view/edit/delete permissions for the areas listed.

Creating a new role

1. In Schedule, choose the *Menu* ≡ button in the top left corner next to Scheduling.
2. Choose **Administration**.
3. Choose the **User Roles** tab.
4. In the **Roles** section, choose *New Role*.
5. In the **Role Detail** section, enter the **Role** and **Description**.

    ⚠ To disable a role, mark the **Disabled** checkbox.

6. Choose *Save*.The role displays in the **Roles** section.

Assigning permissions to a role

1. With the created role highlighted, in the Role Permissions section you can choose the **Role Permissions**.

2. Mark or unmark the View, Edit, or Delete columns for the listed areas.
3. Choose the *Save* icon.

Assigning user roles

A user is limited to one role, although one role may be assigned to more than one user.

1. In Schedule, choose the *Menu* ☰ button in the top left corner next to Scheduling.
2. Choose **Administration**.
3. Choose the **User Detail** tab.
4. In the **Users** section, choose the user.
5. In the **User Roles** section, choose *Assign Role*.
6. In the **Available Roles** window, mark the **Role** checkbox.
7. Choose *Assign Roles*.

Deleting roles

A role can only be deleted if it is not assigned to users.

1. In Schedule, choose the *Menu* ☰ button in the top left corner next to Scheduling.
2. Choose **Administration**.
3. Choose the **User Detail** tab.
4. In the **Users** section, choose the user.
5. In the **User Roles** section, choose *Assign Role*.
6. In the **Available Roles** window, right-click on the role and then choose *Delete*.

General setup

The general setup consists of setting up options for each of your companies as well as global options that apply to all the companies.

- Setting up company options on page 8
- Setting up global options on page 11

Setting up company options

These settings are defined for each company that you have.

> ⚠ Depending on the Appointment Auto Reload setting under Global Options on page 11, you may need to choose the Refresh ⟳ button at the top right of the Scheduling view to see your changes.

- Setting up schedule configuration on page 9
- Setting up schedule colors on page 9
  - Setting up custom colors on page 10
- Setting up fields to display on page 10

Setting up schedule configuration

1. In Schedule, choose the *Menu* ☰ icon and then choose *General Settings*.
2. In **Company Options** under Schedule Configuration, complete the following fields, as needed:
   - **Schedule Days to Retrieve on Load (1-14)**: Enter the number of schedule days to display.
   - **Unscheduled Days to Retrieve on Load (1-60)**: Enter the number of unscheduled days to display.
   - **Time View Bar Height (pixels 20-200)**: Enter the height of the resources rows that display on the schedule board.
   - **Week View**
     - **Number of Days in Week View**: Enter the number of days to display in the Week View.
     - **Skip Saturday/Sunday**: Mark the checkbox next to the weekend days to not display on the schedule.
   - **Schedule Visible Hours**: Enter the start and end time to display on the schedule.
   - **Automatic Status Assignment (Drag & Drop)**: Choose the status to automatically update after dragging from the Unscheduled grid to the schedule board for the following options. If the option is left blank, the status will not automatically update.
     - **Unassigned Update**
     - **Unscheduled Update**
     - **Scheduled Update**
     - **Unschedulable Status**: This status applies to dragging to the schedule board as well as within the schedule board.
       Two examples:
       - Unschedulable Status set to Waiting for Parts, this will prevent this appointment from being dragged to the schedule board. The status would have to be manually updated in appointment details and then dragged.
       - Unschedulable Status set to Closed - This will prevent the closed appointment from being dragged to a different time slot or resource.

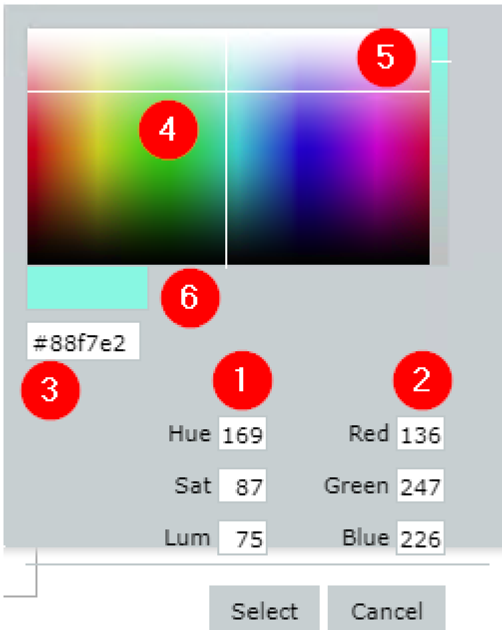
     - **Mapping Options**: See Map View setup on page 11.
3. Choose *Save*.

Setting up schedule colors

1. In Schedule, choose the *Menu* ☰ icon and then choose *Settings*.
2. Under Company Options, in the **Schedule Configuration** section, you can set up custom colors for the background of the work order on the schedule as well as the small square icon within that service call that indicates a property that you define. See [Setting up custom colors .
   - **Status Background Colors**: This is the color of the service call as displayed on the schedule and in the unscheduled list.
   - **Work Order Icon Colors**: The service call icon displays within the service call as displayed on the schedule as well as in the unscheduled list.Choose one of the following properties to indicate what information your dispatchers need to know at a glance. After choosing the property, a list of options displays related to that property.
     - Use Work Order Type
     - Use Work Order Problem
     - Use Division
     - Use Service Area
3. Choose *Save*.

Setting up custom colors

You have several options available to set the color of the service call status or the service call icon. The color picker automatically displays when you choose the field to the right of the label. After the color has been set up for the field, choose *Select*.



1. **HSL** - Enter the hue, saturation, and lightness numbers.
2. **RGB** - Enter the red, green, and blue numbers.
3. **HEX** - Enter the six character code.
4. **Color picker** - Use the cross hair to choose a color.
5. **Saturation** - For any of the above methods, you can darken or lighten the color by using the slide bar on the right side.
6. **Color sample** - Displays the color that will be used.

In the example below, the following color settings have been set: Default background color (fuchsia), Unscheduled background color (purple), Maintenance Contract icon (green).

Setting up fields to display

In the Service Call & Appointment Form Fields section, you can choose the fields to hide/display when you open the service call, service appointment, job appointment, and/or resource appointment. Each service call or appointment has required fields that cannot be unchecked.

1. In Schedule, choose the *Menu* ☰ icon and then choose *General Settings*.

2. In **Company Options** under **Service Call & Appointment Form Fields**, choose to hide/display fields from the following tabs:
   - Service Call Fields
   - Service Appointment Fields
   - Job Appointment Fields
   - Resource Appointment Fields
3. Choose *Save* at the bottom of each tabbed window.

Setting up global options

The Global Options settings are for all companies.

1. Complete the following:
   - **Schedule Time Scale**: Choose the time scale to display on the schedule.

     > If you use the Timeline View on the schedule board, the maximum number of days that can be displayed depends on the time scale chosen:
     > - **15 Minutes** - Limited to 1 day.
     > - **30 Minutes** - Can display 1-3 days.
     > - **60 Minutes** - Can display 1-5 days.

   - **Appointment Auto Reload**: Choose to have the schedule automatically update as well as the refresh rate by entering the number of minutes (1-60) next to **Time Period**.
   - **Date Display Setting**: Choose the date format to display.
     - **MM-DD-YYYY** - 10-23-2021
     - **DD-MM-YYYY** - 23-10-2021
     - **YYYY-MM-DD** - 2021-10-23
   - **Display Resource Overallocation (Timeline view)**: Choose to display the overallocation of resources in the Timeline view.
   - **Max Attachment Size (MB)**: Enter the maximum MB file size for attachments.
2. Choose *Save*.

> Depending on the appointment auto reload setting, you may need to choose the *Refresh* button at the top right of the Scheduling view to see your changes.

Map View setup

Setting up mapping involves enabling the mapping option and its associated setup as well as setting up the starting location for the resources that will be displayed on the map.

The following steps be completed to use the mapping feature:

- Setting up mapping options on page 11
- Setting up resource options on page 12
- Setting up vehicles on page 13

Setting up mapping options

1. In Schedule, choose the *Menu* icon and then choose **General Settings**.
2. In Company Options under Schedule Configuration, in the Mapping Options section, choose one of the following:

- If you do not want to use the mapping feature, mark **No Mapping**.
- To use mapping, mark either **Google** or **Bing** and then enter your **Key**.

> Sign up for the latest API key:
> Google Maps: https://cloud.google.com/maps-platform/pricing/ (You will need an API key that includes Maps and Routes. You do not need Places.)
> Bing Maps: https://www.microsoft.com/en-us/maps/licensing/options

3. Complete the following setup options:
   - **Use Status to Trigger Resource Location Change**: If marked, when an appointment status is changed to the specified Status, the location of the technician will update on the map.
   - **Break Duration (min)**: Enter the number of minutes for a technician's break that will be used if you are route planning.
   - **Round-up Start Time**: Choose the number of minutes to round up to the start time.
   - **Icons**: You can accept the default icons that display on the map or you can choose different icons at http://fontawesome.io/icons/
4. Choose *Save*.

When the Google or Bing APIs are called

- **Get Latitude/Longitude option** - This process sends 1 request per Service Location address for only those locations that do not yet have latitude/longitude. Once a location has Latitude/Longitude values, Schedule never calls the API again for that location. MobileTech also updates Latitude/Longitude on locations, so a customer who has been using MobileTech may see that some locations already have Latitude/Longitude values. In Schedule, this is the *Get Latitude/Longitude* option in the Process Requests tab in Administration Setup. See Processing requests on page 6 for more information.
- **Process Resource Home Locations** - The first time this process is run, 1 request per Technician is sent because it is passing in their starting address to get a returned Latitude/Longitude. After that, there is no call to Google or Bing API when they are reset to their starting point. We simply copy the defined Latitude/Longitude into the associated vehicle record. The only time it would run again is to get new Latitude/Longitude for new technicians. This is the *Process Resource Home Locations* in the Process Requests tab in Administration Setup. See Processing requests on page 6 for more information.
- **Creating new customer locations in Schedule** - A request is sent to get Latitude/Longitude for the new address. See Working with customers on page 30.
- **Displaying the map** - Each display of the map is a single request. It passes in an array of Latitude/Longitude values and the API plots those locations on a map. Each time a map is displayed or refreshed is an API request.
- **Optimizing the route for a single technician** - Google has an additional map option that is the **Optimize Route** feature available when viewing the map for a single technician. In that case, using this feature makes an additional single *request* to the Route API.

Setting up resource options

If you will be using Map View, you will need to set up each resource's **Start Location** and if most resources start at the office, you can select multiple resources (CTRL+select) and then enter the office location. For resources starting from their home, choose the resource and then enter their address.

1. In Schedule, choose the Menu button in the top left corner next to Scheduling.
2. Choose *Administration*.
3. Choose the **Resource Options** tab.
4. If all or some of your technicians will be starting from the home office, you can multi-select them from the list and then enter the Home Address information and Save.

5. If some of your technicians are starting from a different location, select the technician and then enter the Home Address information and Save.
6. If you are using Advanced Communications (HTML email notifications to customers), you can enter each technician's information.

   For more information on setting up Advanced Communications, see the *Signature Agent Configuration* documentation.

Setting up vehicles

Technicians can be assigned to a specific vehicle in Signature. Schedule uses this information when using the Mapping feature.

To set up the vehicle complete the following steps:

1. Choose *Microsoft Dynamics GP* > *Tools* > *Setup* > *Service Management* > *Lookup Setup* > *Technicians* > *Vehicles*.
2. Complete the following fields:
    - **Vehicle ID**: Enter the company vehicle ID.
    - **Technician ID**: Choose the Technician ID who will be assigned to the vehicle.
    - **Vehicle ID Number (VIN)**: Enter the VIN number.
    - **Description**: Enter a description of the vehicle.
    - **Vehicle Status**: Enter the status of the vehicle.
3. If the vehicle is no longer active, mark the **Inactive** checkbox.
4. Choose *Save*.

Report setup

- Copy to local SSRS location on page 13
- Deploying the Report on page 13
- Set location path on page 14

Copy to local SSRS location

1. Go to Schedule's installation location and then *Schedule* > *WebsiteResourceFiles* > *SSRS Reports*.
2. Copy *Resource Schedule.rdl*.You can either right-click on the file name and then choose *Copy* or you can highlight the file name, choose *Edit* and then choose *Copy*.
3. Paste the **Resource Schedule.rdl** file in the *Signature Service* reports location. *Microsoft Dynamics\GPxxxx\Signature\SRS Reports\Signature Service*

Deploying the Report

1. Launch Microsoft Dynamics GP and then go to *Microsoft Dynamics GP* > *Tools* > *Setup* > *Service Management* > *Module Setup* > *Service Options*.
2. Under **Reporting** at the bottom of the window, choose *Run Wizard* and then choose *Continue*.
3. Choose *Next*.
4. Complete the server information and choose *Next*.
5. Choose the **System Database** and then choose *Next*.
6. Verify the information and choose *Next*.
7. In the next window, unmark all checked boxes.
8. Expand **Signature Service**. by choosing the **+**.
9. Mark the checkbox next to **Resource Schedule** and choose *Deploy*.

10. After the report has deployed, you are returned to the Report Wizard window. Choose *Cancel* to close the window.Repeat this for any additional company databases.

Set location path

1. Launch and connect to the SQL Server.
2. Run the following SQL statement to display the Resource Report: UPDATE WSRepts SET ReportLocation = 'Report URL' WHERE ReportReference = 'Schedule_Resource_Report_1'
3. Enter the **ReportLocation**.
4. Move the focus off the ReportLocation and then close the SQL Server.

Email notification setup

Advanced Communications is an add-on product that provides you with the ability to send the following appointment trigger emails to your customers from within Schedule. You can send the advanced HTML email notification in Schedule from the appointment window or by right-clicking the appointment and then choosing *Notify Customer*.

In addition to the default standard triggers[2], Advanced Communications provides you the ability to notify the customer and/or technician when the following appointment triggers occur:

- Technician Arrived
- Technician in Route (Dispatched)
- Appointment Completed

You can set up standard or Advanced Communication notification emails that will be sent to customers and/or technicians for the stages of an appointment. See the *Signature Agent Configuration* documentation.

Setting up the ServiceChannel integration

This section provides information on setting up the integrations from the ServiceChannel to ESMS and ESMS to Schedule.

- Setting up the ServiceChannel Integration in ESMS on page 15
    - Obtaining the ServiceChannel Client ID and Secret on page 15
- Setting up ESMS Integration in Schedule on page 15
    - ESMS integration setup options on page 15
    - Adding user role service request permissions on page 15
- Designating dispatcher notification email addresses in Signature Agent on page 16
    - Example of Change Communication Notification on page 16
    - Example of Cancellation Change Communication on page 17

> If you do not see the ESMS integration area in Schedule settings, please contact our operations team to request a new product registration key.

2 https://docs.key2act.io/display/NewTopics/Working+with+Event+Trigger+Notifications#WorkingwithEventTriggerNotifications-default-standard

Setting up the ServiceChannel Integration in ESMS

Unable to render include or excerpt-include. Could not retrieve page.

Obtaining the ServiceChannel Client ID and Secret

Unable to render include or excerpt-include. Could not retrieve page.

Setting up ESMS Integration in Schedule

ESMS integration setup options

In Schedule, the ServiceChannel integration setup options are enabled if the service aggregator feature has been registered.

1. In Schedule, choose the *Menu* ☰ icon and then choose *General Settings*.
2. In ESMS Integrations under Company Options in Schedule Configuration, complete the following fields, as needed:
    - **ClientID/Client Secret**: This information is provided to you from WennSoft upon request.
    - **Polling Frequency:** This defaults to 15 minutes.
    - **Open Auto Process Window**: Set to **On** to have the Edit Service Call window automatically open when the dispatcher accepts a service request. This window opens on the Schedule tab.
    - **Callback URL**: This unique URL will need to be provided to WennSoft when setting up your integration.
3. Choose *Authenticate* to verify that your ClientID and Client Secret are correct.

    > ⚠ Pop-up blockers will need to be disabled to authenticate your ClientID and Client Secret.

4. Choose *Save*.

Adding user role service request permissions

Only users with the permission to view service requests will be able to see the Service Request tab accessed from the Customer Hub.

1. In Schedule, choose the *Menu* ☰ button in the top left corner next to Scheduling.
2. Choose **Administration**.
3. Choose the **User Roles** tab.
4. Choose the **User Role**.
5. In the Role Permissions section, mark or unmark the Service Request permissions of *View*, *Edit*, and/or *Delete*.
6. Choose *Save*.

Designating dispatcher notification email addresses in Signature Agent

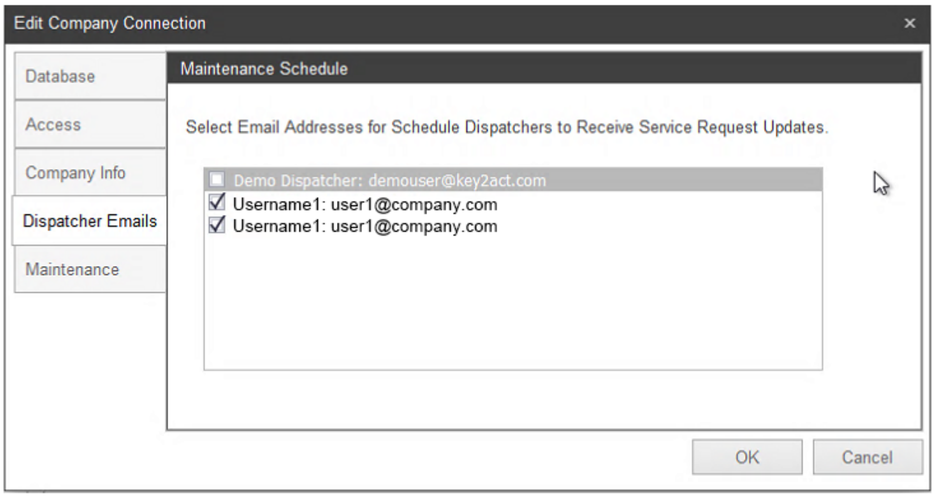
When working with service requests that are generated from ServiceChannel, there may be instances that the service request is updated on the ServiceChannel side that also updates the service request. The notifications are emailed to the Dispatcher Email Address(es) that were marked in Signature Agent.

In Schedule, there are two occasions when emails will be sent to the dispatcher email group:

- Change notification: If the scheduled date, scheduled time, priority, and/or NTE amount has changed.
- Cancellation notification: The service request was cancelled.

To designate the email address(es) to receive the notifications:

1. In Signature Agent, on the Home tab, choose the company.
2. Choose *Properties*.
3. On the **Dispatcher Email** tab, mark the email address checkbox(es) that the notifications will be sent to.



4. Choose *OK*.

Example of Change Communication Notification

The change communication is sent if the Scheduled Date, Scheduled Time, Priority, and/or NTE amount has changed on the service request. The email lists all three original and current values, regardless of what value may have changed.

Subject: An important service request value has changed

The priority, scheduled date and/or NTE value on the service request used to generate Service Call ID: 181026-0001 for Customer: DACER and Location: NYC has changed.

	Previous Value	Current Value
Scheduled Date	10/26/2018	10/26/2018
Priority	Sev 3	Sev 3
NTE	5000	10

Please review and update the service call and any associated service appointments or service call quotes for the necessary changes.

Example of Cancellation Change Communication

If a service request is cancelled through the service aggregator, the service request will no longer display in the Service Request window. The dispatcher distribution group will receive the following notification. If a service call has been created, this will need to be manually updated in Signature.

> **Subject:** An important service request value has changed
>
> Attention: An accepted service request has been cancelled. The associated appointment for Service Call ID: 181026-0004 for Customer: DACER and Location: NYC has been updated and the status has been changed to cancelled. Please review the service call for additional necessary actions to close the call.

Using the Schedule Board

Use the steps in this section to complete everyday tasks on the schedule board.

Topics within this section:

> ⚠ To access Schedule's full capability, we recommend Google Chrome[3] or other non-Microsoft browsers for your internet browser. Microsoft browsers may still be able to access Schedule but you may not have access to all features.

Filtering and sorting in Schedule

Every list with empty fields displayed at the top of the list can be filtered by entering in the first few letters for that column.

You can also sort these lists by choosing the column header. A small triangle points to indicate if the sorting is ascending (A-Z) or descending (Z-A).

Real-time changes to the schedule board

With Schedule, changes to the Schedule Board update Signature immediately.

3 https://www.google.com/chrome/

Refresh the schedule board

When you have made changes to appointment details, within Service Management or Job Cost, or with settings, you may need to refresh the schedule board to see these updates. A reload occurs in these scenarios:

- Automatically, as defined by the interval in the **Automatic Reload** section of the Global Options window in General setup on page 8.
- Manually, when you choose the *Refresh Appointments* icon.

Double-booking and appointment conflicts

The ability to double-book a resource is set up in Service Management. In Schedule, *where* you create the appointment matters regarding the ability to double-book a resource when your setup does not allow double-booking.

If you create a service appointment in Schedule that conflicts with another appointment and double booking is not allowed:

- **Schedule board** - You will receive a message indicating that double booking is not allowed for the resource. You will not be able to create an appointment for that resource. See Create additional appointments on page 22 for information on creating an appointment from the schedule board.
- **Appointment wizard** - The appointment will be created. The Appointment Wizard does not check the double-book set up status. See Using the appointment wizard on page 23 for information on creating appointments with the wizard.

When you create a service appointment in Schedule and double booking is allowed, the appointment is created.

Change the schedule board view

You can customize the schedule board view. Changing the view does not change the content that is displayed on the schedule board. However, changing the view lets you customize what you see on your board, depending on the size of your monitor and other display properties.

You can make these changes:

- Change the schedule view on page 18
- Viewing appointments for other days or months on page 19

Change the schedule view

By default, the schedule board is displayed in the Timeline view (horizontal day), but you can switch between the views using the view buttons located in the menu area on the schedule board.

• **Day** - For the selected day of week, technical resources are listed horizontally, while the hours of the defined business day are listed vertically.	

• **Week** - For the selected number of days, technical resources are listed horizontally while the hours of the defined business day are listed vertically.
  • Use the left/right arrows (to the right of the TODAY button) to scroll to the next/previous week.
  • If you have more than 7 technicians selected in the resource list, use the right arrow button that is in the top right of the last day displayed to scroll through the technicians, without advancing to the next week.	

• **Timeline** - For the selected day(s), technical resources are listed vertically, while the hours defined for the business day are listed horizontally. Depending on your Global Options Time Scale settings, you may be able to view up to 5 days by choosing appropriate number in the Days to show drop-down in the far right corner of the schedule.
  • **15 Minutes** - Limited to 1 day.
  • **30 Minutes** - Can display 1-3 days.
  • **60 Minutes** - Can display 1-5 days.	

Viewing appointments for other days or months

On the right side of the toolbar, use the single arrows to move forward or backward one day or week at a time, depending on the view.

You can also use the *Calendar* icon to choose a specific date.

Changing companies

If you need to switch to a different company, in the top right corner of the window, choose the drop down field that is displaying the default company name. Choose the company to switch to.

Working with appointments and service calls

> **Important:** If you intend to use Job Appointments and you also use TimeZone views in Service Management, your users must use the Signature Alternate Dynamics versions of the Customer Maintenance, Customer Address Maintenance, and Customer Class setup windows. These windows contain information that is specifically used by Signature during the appointment scheduling process.

Topics in this section:

Editing appointments and service calls

- View or edit service appointment details on page 20

View or edit service appointment details

You can easily view and edit the details of a service appointment.

1. Double-click the service appointment. This can be a scheduled or unassigned appointment.
2. The Service Appointment Details window displays. You can view and change the information the appointment information. Additional fields may display depending on Schedule settings.
    - Customer Name
    - Location Name
    - Service Call - Display only
    - Appointment - Display only
    - Description
    - Status
    - Resource
    - Start Date
    - Estimated Hours
    - Skill Level
    - Priority
    - Completion Date - Display only
    - Actual Hours - Display only
3. You can also choose these icons to view additional information.
    - - Service Call Time Stamps
    - - Appointment history
    - - Service Call Tasks
    - - Add a Note
    - - Related appointments
    - - Service Call Quick Print
    - - Notify Customer
4. Choose *Save*.

View or edit the service call

You can easily view the service call from the schedule board.

1. Right-click the appointment and then choose *Open Service Call*.
2. The following fields can be edited:
    - Division
    - Description
    - Service Call Status
    - Equipment - If the service call already has equipment assigned in Service Management, the field in Schedule is display-only. Only equipment that is active for the customer and location can be selected.
    - Caller Name/Email/Phone
3. You can choose any of these icons to view additional information:
    - - Service Call Time Stamps

- - Service Call Tasks
- - Service Call Notes
- - View Attachments
- - Related appointments
- - Notify Customer

4. Choose *Save*.

View or edit job appointment details

You can easily view and change the details of a job appointment, also called a job activity.

1. Double-click the job appointment to view or change the appointment. This can be a scheduled appointment or an unassigned appointment.
2. The Job Appointment Details window displays. You can view information about the location of the appointment.
3. In the **Job Details** area, you can view and change additional information in most of the fields. Additional fields may display depending on Schedule settings.
    - Customer Name
    - Location Name - Billing address
    - Job - Display only
    - Appointment - Display only
    - Description
    - Cost Code
    - Status
    - Resource
    - Start Date
    - Estimated Hours
    - Priority
    - Completion Date - Can be edited if the appointment status is set to completed.
    - Actual Hours
4. You can also choose these buttons to complete other tasks.
    - - Appointment history
    - - Related appointments
5. Choose *Save*.

Making appointment changes on the schedule board

You can change the time of an appointment by clicking and dragging the appointment bar or by changing the start time, estimated hours

Change the time of an appointment for the same day

1. Choose the appointment, holding the left mouse button down to display a pointing finger .
2. Move the appointment to the new time. The time change is displayed as you drag the appointment. When you are finished, release the mouse button.

Change the length of an appointment

You can change the length of an appointment by clicking and dragging the beginning or end of the appointment bar.

1. Hover over the left or right edge of the appointment bar, depending on whether you are changing the start or end time. You should see a double arrow ↔ .

2. Holding the left mouse button down, drag the appointment left or right. The time change is displayed as you drag the appointment. When you reach the correct appointment length, release the mouse button.

Create additional appointments

You might need to schedule an additional appointment for a job appointment or service call to account for additional – and possibly unexpected – work.

You create an additional appointment by right-clicking on an existing appointment for the service call.

To create an additional appointment:

1. Right-click on the existing appointment on the schedule or in the unscheduled list, choose *Create New Appointment*.
2. The **Start Date** defaults to the date of the original appointment. You can either manually enter the date and time or you can use the calendar.
   To use the calendar:
   a. Choose the date in the field and then choose the correct date in the calendar.
   b. At the bottom of the calendar, choose the hour to display a pop-up of hours. Choose the minutes to display the minutes in increments of 15.
3. Enter any additional information as needed.
4. Choose *Save* to add the appointment to the schedule.
5. You can update the appointment by either dragging and dropping or you can double-click the appointment.

Completing appointments

To complete an appoint you can:

- Right-click on the appointment, choose **Status** and then choose **Complete Appointment**.
- Double-click an appointment, change the **Status** in the appointment details window to **COMPLETE**, and then choose *Save*.

When an appointment is completed and saved, this information applies:

- The **Actual Hours** field in the appointment details window is available. If the actual length of the appointment changed from the estimated hours, enter that time in this field and save the changes.
- After an appointment has been completed, you can no longer drag or resize the appointment on the schedule board. However, you can change the appointment length by opening the appointment details window and changing the value in the **Actual Hours** field.

If appointments are manually completed in Schedule and/or Signature, the system uses the following logic to calculate the completion date and time as an appointment is set to a completed status.

- The actual completion date/time will be defaulted to the appointment start time and date plus the actual hours entered by the technician.
- If the technician has not entered actual hours, the calculation will use the estimated hours to determine the completion time.
- If there are no estimated hours (or actual hours) entered in the appointment, the system will use a default duration of 15 minutes so that the appointment remains displayed on the schedule board.

Our goal is to calculate the appointment completion date/time in the most effective manner as this value is not driven by the date/time the service call is physically set to a completed status.

Unscheduled or unassigned appointments

The Unscheduled grid displays all unscheduled or unassigned appointments for the resources that are marked in the Resource list. To view all resources that you have access to view, mark the *Show/Hide Resources* checkbox. You can filter and/or sort the information displayed in the Unscheduled/Unassigned grid. For more information see Filtering and sorting in Schedule on page 17.

Unscheduling an appointment

To unschedule an appointment, you can do one of the following:

- Right-click the appointment on the schedule board and then choose *Unschedule*.
- Double-click the appointment and then change the **Time** to **12:00 AM**.

Unassigning an appointment

To unassign an appointment, you can do one of the following:

- Right-click the appointment on the schedule board and then choose *Unassign*.
- Double-click the appointment and then change the Resource to *UNASSIGNED*.

Using the appointment wizard

The appointment wizard helps you to quickly create single or recurring activities or job/service appointments for technician(s), a technician team, or a service area.

1. From the schedule board, right-click on a resource or any appointment/activity.
2. Choose *Appointment Wizard*.
3. Mark the radio button for who you are creating this activity/appointment for.
    - **All**: All technicians will be assigned.
    - **Technician**: One or more technicians selected will be assigned. You can also choose UNASSIGNED.
    - **Technician Team**: All technicians within the selected team will be assigned.
    - **Service Area**: All technicians within the service area selected will be assigned.
4. Choose the **Appointment Type**:
    - Service Appointment on page 23
    - Job Appointment on page 24
    - Technician Activity on page 24

Service Appointment

Continuing from the steps above for creating a single or recurring service appointment:

1. Choose the **Service Call Number**.
2. Choose the **Technician**, **Technician Team**, or **Service Area** to assign the appointment to. If you chose to assign this to **All**, these fields will be disabled.
3. Enter a **Description**.
4. Choose the **Appointment Status**.
5. The **Start Date** defaults to today's date and midnight. You can edit the date and time.
6. The **End Date** defaults to today's date.
7. Enter the **Estimated Hours**.
8. Enter the number of **Days Between Appointments**. For example, if you have a date range entered above and enter 2, this will create an appointment every two days.
9. Mark the weekend days to skip from scheduling appointments.

10. Choose *Create*.

Job Appointment

1. Choose the **Job Number**.
2. Choose the **Cost Code**.
3. Choose the **Technician**, **Technician Team**, or **Service Area** to assign the appointment to. If you chose to assign this to **All**, these fields will be disabled.
4. Enter a **Description**.
5. Choose the **Appointment Status**.
6. The **Start Date** defaults to today's date and midnight. You can edit the date and time.
7. The **End Date** defaults to today's date.
8. Enter the **Estimated Hours**.
9. Enter the number of **Days Between Appointments**. For example, if you have a date range entered above and enter 2, this will create an appointment every two days.
10. Mark the weekend days to skip from scheduling appointments.
11. Choose *Create*.

Technician Activity

1. Choose the **Activity ID**.
2. Choose the **Technician**, **Technician Team**, or **Service Area** to assign the appointment to. If you chose to assign this to **All**, these fields will be disabled.
3. Enter a **Description**.
4. Choose the **Appointment Status**.
5. The **Start Date** defaults to today's date and midnight. You can edit the date and time.
6. The **End Date** defaults to today's date.
7. Enter the **Estimated Hours**.
8. Enter the number of **Days Between Appointments**. For example, if you have a date range entered above and enter 2, this will create an appointment every two days.
9. Mark the weekend days to skip from scheduling appointments.
10. Choose *Create*.

Notifying customers via email

You can send the email notification in Schedule from the appointment or service call window by choosing the Notify Customer icon or by right-clicking the appointment or service call and then choosing *Notify Customer*.

> For more information about Standard and Advanced Communications, see Event Trigger Notifications in Signature Agent documentation.

Standard notifications

Appointment cancelled
Appointment created and scheduled
Appointment reassigned
Appointment rescheduled
Technician arrived
Technician checked out

Service call created
Service call created by ESMS email

Advanced communication HTML notifications

Technician arrived
Technician in Route (Dispatched)
Appointment Completed

Working with resources

Use these tasks to work with resource information in Schedule. At this time, a resource is a technician.

Dispatchers are associated with a user profile from Service Management that may be associated with a region and/or a branch. The dispatcher will only see the technicians within that region and/or branch.

Marking displayed technicians will update the schedule board with the technicians' appointments as well as the information displayed in the Unscheduled or Unassigned Resources section.

- View resource details on page 25
- Unschedule or unassign resources on page 26
- Identify over-allocated resources on page 26
- Create a resource activity on page 27
- View or change resource activities on page 27

View resource details

To view the resource details, double-click on the resource name from either the **Resources** section or the **Schedule** section.

The Resource Detail window opens. You can view the following information that has been entered in Signature Service Management:

- Resource Type
- Employee ID
- Technician Name
- Primary Skill Level
- Technician Team
- Extended Hours
- Refrigerant Certification #
- Time Zone

You can also view if the resource is Inactive and if Allow Double Booking has been turned on.

Tabs along the bottom of the window displays additional information:

- Branches
- Skill Sets
- Shifts
- Service Area
- Inventory Sites

Unschedule or unassign resources

If you need to unschedule or unassign a resource from an appointment, you can do one of the following:

- Right-click the appointment on the schedule board and then choose **Unschedule** or **Unassign**.
- Double-click the appointment and then change the **Time** to **12:00 AM**. and/or update the Resource to **UNASSIGNED**.

Unschedule a resource

To unschedule a resource, you can do one of the following:

- Right-click the appointment on the schedule board and then choose *Unschedule Appointment*.
- Double-click the appointment and then change the **Time** to **12:00 AM**.
- To unschedule all appointments for the resource, right-click on the resource name on the schedule board and choose *Unschedule All*. This will move all appointments for the day to the **Unscheduled Appointments** section. The appointment is still assigned to the technician but is no longer displayed on the schedule board.

Unassign a resource

To unassign a resource, you can do one of the following:

- Right-click the appointment on the schedule board and then choose *Unassign Appointment*.
- Double-click the appointment and then change the Resource to *UNASSIGNED*.
- To unassign all appointments for the resource, right-click on the resource name on the schedule and then choose Unassign All. This will move all appointments for the day to the **Unscheduled Appointments** section.

Identify over-allocated resources

You can allow for the over-allocation of resources for appointments by using a global setup option in Settings. Resources are considered over-allocated when their number of hours exceeds their shift hours plus their allowed extended hours.

When a resource is over-allocated, the resource name in the **Schedule** area of the schedule board is updated to a pale red.

Generate resource reports

You can create two types of technician reports: one shows a daily view of appointments and the other shows a monthly view of appointments.

1. On the button bar, choose *Reports*. The Technician Report window is displayed.
2. Choose to run a daily or monthly report.
3. Select a technician.
4. Enter the date ranges:
    - To create a daily report, select a start date and enter the number of days that the report should cover.
    - To create a monthly report, enter the month and year for the report.
5. Choose *View Report*. The report is displayed.
6. Choose a printing option:
    - Choose **Print** to print the report.
    - Choose **Page Setup** to change the print properties.
    - Choose **Print Preview** to view an onscreen, printable version of the report.

Create a resource activity

You can create technician activities from the schedule board. These activities might be for vacation time, sick time, etc. – the same types of activities that you can create in Service Management.

Create technician activities by using the **New Technician Activity** menu option in the **Technicians** area of the schedule board, or by copying an existing activity on the board.

1. In the list of resources on the main schedule board, right-click on the resource and then choose **New Resource Activity**.
2. Complete the fields.
3. Choose *Save*.

View or change resource activities

You can easily view and change the details of a resource activity.

1. Double-click the resource activity to view or change. The Resource Activity Details window is displayed.
2. You can view and change additional information in these fields.
    - **Technician Name**: The technician who is assigned to this appointment.
    - **Activity**: The type of activity that is being completed, such as jury duty or training.
    - **Appointment Description**: A short description of the activity.
    - **Start Date/Time**: The date and time when the appointment was started.
    - **Estimated Hours**: The estimated length of the appointment.
    - **Appointment Status**: The status of the appointment.
3. You can also choose to *Delete* the activity.
4. Choose *Save*.

Change the start time or length of an activity from the schedule board

You can change the time of an appointment by clicking and dragging the appointment bar or by changing the start time, estimated hours, or both in the appointment details window.

Change the start time of an activity for the same day

1. Choose the activity, holding the left mouse button down to display a pointing finger .
2. Move the activity to the new time. The time change is displayed as you drag the activity. When you are finished, release the mouse button.

Viewing reports

Daily Schedule Board

This report displays a PDF copy of what is shown on the schedule board.

1. To view this report, choose the *Adobe* icon to the left of the *TODAY* button.
2. In the Save As window, navigate to the location to save the PDF file and choose *Save*.

Resource Schedule

The Resource Schedule report can be printed for a specific resource or you can print this for multiple technicians.

1. Right-click on a resource name from the schedule board.
2. Choose *Print Resource Schedule* and then choose *Schedule_Resource_Report_1*.
3. A new tab is opened in your browser displaying the resource's schedule for the day.
4. If you want to see a range of dates, you can edit the **Start/End Dates** at the top of the report.
5. You can also choose more than one technician from the **Technician** drop-down.
6. Choose View Report to see your changes.

Using the Resource Report Wizard

You can also print the Schedule Resource Report by using the report wizard.

1. Right-click on a resource name from the schedule board.
2. Choose *Print Resource Schedule* and then choose *Report Wizard*.
3. In the Resource Schedule Report window, the **Start/End Dates** default to today's date. You can edit these fields to display a range of dates.
4. Choose the **Run For** drop-down and choose an option for who you want to run the report for: All, Technician, Technician Team, Service Area, or Branch.
5. Depending upon your selection, choose one or more technicians, a team, a service area, or a branch.
6. Choose *Run Report*.

Working with notes and attachments

Notes and attachments work the same throughout Schedule.

- Working with notes on page 28
    - View or change a note on page 28
    - Create a note on page 29
- Working with attachments on page 29
    - View an attachment on page 29
    - Add an attachment on page 29

Working with notes

You can view notes that are related to a service call, such as customer and location notes. You can also create notes that pertain to a service call or service appointment.

Available note types are customer, location, service call, and contract. Notes can be added from the appointment details or from the Customer Hub.

View or change a note

1. On the schedule board, double-click the service appointment.
2. Choose the *Notes* button. The Service Notes window is displayed.If the Notes icon displays as blank , no notes are available.

3. Double-click the note, or select the note and choose **Select**. The Note Detail window is displayed.
4. Make any changes and choose *Save*.

Create a note

1. On the schedule board, double-click the service appointment.
2. Choose the *Notes* icon. The Service Notes window is displayed.
3. Choose *Add New Note* icon. The Note Detail window is displayed.
4. Enter the **Subject**.
5. The author defaults to the current user however you can choose a different author.
6. Specify whether the note serves as a reminder note (**Reminder**) and/or can be printed (**Printable**).
7. Enter the note text in the box.
8. Choose *Save*.

Working with attachments

You can view attachments that are related to a service call. You can also add attachments that pertain to a service call or service appointment.

View an attachment

1. On the schedule board, right-click the service appointment, and then choose *Open Service Call*.
2. Choose the *Attachment* icon.If the Attachment icon displays as blank , no attachments have been added.
3. In the Attachments for Service Call window double-click the attachment to view.

Add an attachment

1. On the schedule board, right-click the service appointment, and then choose *Open Service Call*.
2. Choose the *Attachment* icon.
3. In the Attachments for Service Call window, choose *Add New Attachment* icon. The Attachments window is displayed.
4. Enter the **Description**.
5. Edit the **Date**, if needed.
6. Select *Choose File*.
7. In the Open window, choose the file and then choose *Open*.
8. Choose *Upload File*.
9. Close the Attachments for Service Call window.

Using the Customer Hub

The Customer Hub shows customer data including their contact information, location, service calls, location equipment, location contacts, location contracts, and/or jobs. Notes and attachments can be added and viewed for the customer, location, service calls, and location equipment. The headers can be used to sort data that displays by choosing the column header. A small triangle points to indicate if the sorting is ascending (A-Z) or descending (Z-A). Use the Search field to search all fields and records. The displayed results are the top 100 records.

Topics within this section:

- Accessing the Customer Hub on page 30
- Working with customers on page 30

- Working with locations on page 31
- Working with service calls on page 31

Accessing the Customer Hub

You can access the Customer Hub in one of three ways, with the last two methods having the selected customer or location highlighted on the hub page:

- Choose the *Customer Hub* icon at the top of Schedule.
- On the schedule board, right-click on the appointment and choose *View Customer Details* or *View Location Details*.
- In the **Unscheduled Appointments** section of Schedule, right-click an appointment and choose *View Customer Details* or *View Location Details*.

Working with customers

The Customer Hub is comprised of two sections. The top section displays all the customers that the dispatcher has access to. You have the ability to filter or sort the data in the header area to narrow down the results displayed.

A Search field at the top of the window searches all fields in the top section. The columns can be sorted by choosing a column header. A small triangle points to indicate if the sorting is ascending (A-Z) or descending (Z-A).

Topics on this page:

- Creating a new customer on page 30
- Viewing customer information on page 30

Creating a new customer

You can create a new customer in the Customer Hub. This information is added to Service Management.

1. In the Customer Hub window, right-click on anywhere in the customer list.
2. Choose **Create New Customer**.
3. In the New Customer/Location window, enter the customer details, required fields are indicated with a red *** asterisk.
4. Choose *Save*.

Viewing customer information

When you access the Customer Hub by right-clicking on an appointment, that customer will be selected in the customer list and their information displays in the customer details section. When you access by choosing the Customer Hub icon, in order to see a customer's details, you will need to select the customer from the list.
The display-only details section contains the following tabbed information associated with the customer.

- Customer
- Location
- Service Calls
- Location Equipment
- Location Contacts
- Location Contracts
- Jobs

Working with locations

Locations are listed separately in the customer list. You can create a new location or view an existing location. Editing locations must be done in Service Management.

Topics on this page:

- Creating a new location on page 31
- Viewing location details on page 31

Creating a new location

You can create a new location for a customer in the Customer Hub window. This information is synced to Service Management.

1. In the Customer Hub window, right-click on the customer. You can use the advanced lookup features to filter and locate customers quickly and more easily by filtering on inactive or bill-only locations, and by rearranging the columns in the lookup window to suit your preferences. If you have global filtering turned on, you will only see those customers in your area.
2. Choose **Create New Location for xxx**.
3. In the New Customer/Location window, enter the location details, required fields are indicated with a red *** asterisk.
4. Choose *Save*.

Viewing location details

To view the location details for a customer, choose a customer from the customer details section and then choose the *Location* tab.

The fields available on this tab include:

- Customer Number
- Address ID
- Location Name
- Address 1
- Address 2
- Address 3
- City
- State
- Postal Code
- Contact Person 1
- Contact Person 2
- Phone 2
- Salesperson
- Hold
- Inactive
- Priority
- Division
- Affiliate
- Region
- Branch
- User_Define_1a
- User_Define_2a
- User_Define_3a
- User_Define_4a
- User_Define_5a
- User_Define_6a

You can also add or read location notes and/or attachments.

Working with service calls

Service calls can be viewed or created in the Customer Hub or they can be created in Service Management.

You can add/view notes and/or attachments for a customer, location, or service calls. For more information see Working with service calls notes or attachments on page 31.

Topics on this page:

Creating a new service call

1. To create a new service call from the customer hub, right-click on the customer from the list.
2. Choose **Create New Service Call for <customer name - location>**.
3. Choose the SCHEDULE tab to see the New Service Call window.
4. The following fields are not editable:
    - Service Call - The service call ID is generated when the service call is saved.
    - Customer Number
    - Customer Name
    - Address ID
    - Location Name
    - Bill Customer Number
    - Bill Address Code
5. Complete the following fields, only Division is required:
    - Division
    - Description
    - Service Call Status
    - Resource - The assigned technician displays but you can choose another technician.
    - Start Date
    - Estimated Hours
    - Completion Date
    - Equipment - Choose from equipment available to the customer/location.
6. Choose *Save*.

Viewing service calls

1. To view the service call(s) for a customer, choose a customer in the Customer Hub.
2. In the details section of the Customer Hub, choose the **Service Call** tab.
3. Double-click the service call to open a display-only view of the Service Call window.

Working with Service Requests

Service requests display in the Service Request tab.

> ⚠ If you have this add-on but you do not see the Service Requests tab, contact your administrator. In addition to the ESMS integration setup, user role permissions need to be set.

Processing service requests

Processing service requests involves the following steps:

1. Accessing the Service Requests tab on page 33.
2. The first time you create a service call from a service request, you will need to map the Signature fields on page 35 so that the ServiceChannel customer and location name/ID are matched to the Signature customer and location name/ID. (This information is stored for any subsequent service requests.)

3. You may need to create a new customer or new location on page 35 for an existing customer.
4. Accepting or rejecting service requests on page 34.
5. If the service request contains an NTE (not to exceed) invoice amount on page 36, you may need to create a service quote in Signature.
6. Creating a service call on page 36.
7. Viewing/editing the service call on page 36 in the Service Call window in the dispatch board on the Schedule tab. Use this window to add or edit additional service call information.

If a service request is updated with ServiceChannel, an email notification is sent to the dispatcher on page 36. The notifications are set to the email address(es) that are set up in Signature Agent.

Related topics:

- Accessing the Service Requests tab on page 33
- Accepting or rejecting a service request on page 34
- Mapping customer information on page 35
- Creating a new customer and/or new location on page 35
- Working with NTE service requests on page 36
- Creating a service call on page 36
- Viewing/editing a service call on page 36
- Receiving Dispatcher email notifications on page 36

Accessing the Service Requests tab

1. You can access the **Service Requests** tab in one of three ways, with the last two methods having the selected customer or location highlighted on the hub page:
   - Choose the *Customer Hub* icon at the top of Schedule.
   - On the schedule board, right-click on the appointment and choose *View Customer Details* or *View Location Details*.
   - In the **Unscheduled Appointments** section of Schedule, right-click an appointment and choose *View Customer Details* or *View Location Details*.
2. Choose the **Service Requests** tab to display the list of new or accepted service requests from the service aggregator. These are the default columns but you can add other columns as needed by choosing the **Insert Column** icon.

   The following is a list of the default columns along with information on where the information originates. Additional columns may display.

Field	ESMS/Signature	Service Aggregator
Received	x	
Client Name		x
Customer Number	x	

Field	ESMS/Signature	Service Aggregator
Location Number	x	
Service Description*		x
Priority		x
Address		x
Request Status	x	x
PO Number		x
Service Call	x	
Service Call Status	x	

The **Service Description** information is combination of the Description and the Caller information that is manually-entered in the ServiceChannel request form. When viewing the service request details, the **Caller Name**, **Phone**, and **Email Address** that display are the contact details for the **Location**.

3. Columns may be sorted by choosing the column header. An indicator displays the sort direction A-Z or Z-A .
4. You have the option to search each column by choosing the lookup icon.

Accepting or rejecting a service request

You can accept or reject a service request in one of two ways.

- Right-click the service request and then choosing **Accept** or **Reject**.
- Opening the service request and then choose the *Accept* or *Reject* button.

A *Rejected* service request will not display on the Service Requests list. This list displays New or Accepted service requests.

Service request cancelled from the service aggregator

A service request may be canceled by the service aggregator client (your customer). If this should happen, the status of the service request will change to Cancelled and the request will no longer be displayed in the Service Request list. If a service call has been created, the dispatcher will receive an email notification and will have to manually cancel the appointment.

Scenario	Result	Notification
Customer cancels a New service request.	Service request status is updated to Cancelled and drops from the Service Request list.	No
Customer cancels an Accepted service request, no service call created.	Service request status is updated to Cancelled and no longer displays in the Service Request list.	No
Customer cancels a service request that has a service call and appointment created.	Dispatcher receives an email notification of the status change and will need to manually update the appointment.	Yes

For more information about dispatcher notifications, see Receiving Dispatcher email notifications on page 36.

Mapping customer information

The first time that you are generating a service call for a specific customer, you need to map the fields from ServiceChannel to Signature fields. Once a customer has been mapped, the fields will automatically display the next time they request service. Mapping the fields is performed when you are viewing the service request information. The lookup fields for the Customer ID and Location ID display only when a link hasn't been established between the service aggregator and ESMS and Signature location.

1. Choose the Service Request.
2. In the detail window that displays, choose **Select Customer**.
3. In the initial display, the list of customer names is filtered to display all customer names that contain the Client Name from ServiceChannel.
4. Choose *Clear* to display a list of all customer names.
5. Choose the Signature Customer Name.
6. You are returned to the service request detail information with the Signature Customer Name displayed.
7. To set the Signature Location ID, choose **Select Location**.
8. The Location display list contains the locations associated with the Signature Customer.
9. Choose to **ACCEPT** the service request.

Creating a new customer and/or new location

If a service request is from a new customer or an existing customer with a new location, you can add this information in the Service Request details window. The information entered here will update Signature as well as add the customer and/or location (site) to ESMS.

1. Choose the service request.
2. In the detail window that displays, choose the **Add Customer** icon.
3. Enter the customer information.
4. You are returned to the service request detail information with the Signature Customer Name displayed.
5. To add a new location, choose the **Add Location** icon.
6. Enter the location information.
7. Choose to **ACCEPT** the service request.

Working with NTE service requests

If a service request is generated with a not-to-exceed (NTE) amount, after the service request has been accepted, you will need to manually create a service quote in Signature Service Management. If the service provider doesn't agree with the amount, they can contact the customer to negotiate the NTE. When the service aggregator is updated, the service request in Schedule is updated and a notification email is sent to the dispatcher. See Receiving Dispatcher email notifications on page 36 for more information.

Creating a service call

1. A service call is generated in one of the following methods:
    - **Method One: Automatically opening the Service Call window when the request is accepted.** When the Service Request is accepted, the Service Call window automatically opens in the Dispatcher window on the Schedule tab;

      > This auto process feature is available under ESMS Integration Settings found in Settings.

    - **Method Two: Manually used context-sensitive menu.** Right-click on the service request and then choose **Create Service Call**; To edit the Service Call, right-click on the Accepted Request and choose Open Service Call to open the window in the Dispatcher window on the Schedule tab.
    - **Method Three: Manually using service request detail section.** Choose the Accepted service request to display the detail information, and then choose *Create Service Call*. To edit the Service Call, right-click on the Accepted Request and choose Open Service Call to open the window in the Dispatcher window on the Schedule tab.
2. The Service Call Description field contains the service aggregator's service description and the requestor's name.
3. After the service call has been created, access the service call window by right-clicking on the service request and choosing **Open Service Call**. The Service Call window displays on the Schedule browser tab. From this window you can add/edit additional information.

Related topics:

Viewing/editing a service call

If the service request has been accepted and a service call was generated, you can view the service call by right-clicking on the accepted service request and then choosing **Open Service Call**. The service call is displayed in the Service Call window in Schedule. You can add or edit the information in this window.

> The **Description** field in the service call contains the description and caller name as entered in the service aggregator. (In ServiceChannel, this is the name entered in the Caller field.) On the service request, the Request Contact information is associated with the Signature Location. This information populates the Caller Name, Email Address, and Phone fields on the service call.

Receiving Dispatcher email notifications

When working with service requests that are generated from a service aggregator, there may be instances that the service request is updated through the service aggregator. The notifications are emailed to the Dispatcher Email Address(es) that were marked in Signature Agent. See Setting up the ServiceChannel integration on page 14 for more information.

- A notification email is sent if either the Scheduled Date, Scheduled Time, Priority, and/or the NTE amount has been updated by the customer through the service aggregator.
- A cancellation notification email is sent if the customer cancels the service request at any time.

Using the Map View

Use the Map View to view scheduled and unscheduled job/service call appointments. Before you can use Map View, you need to set up Mapping.

If *No Mapping* is marked in Mapping Options in Configuration Settings, the Map View icon will not be displayed. See Map View setup on page 11 for more information.

Viewing appointments on map

Access Map View

1. To open Map View, choose the *Map View* icon.
2. The Map and Route Resources window opens and displays all job and service appointments, scheduled and unscheduled, as well as unassigned appointments.
3. The icons that display for the job/service appointments as well as unassigned and unscheduled appointments depend on the mapping options on page 11 in Configuration settings.

   The default icons are:
   - - Resource
   - - Scheduled appointment
   - - Unscheduled appointment
   - - Unassigned appointment

Viewing appointment details

You can view a pop-up window that displays the appointment details.

1. In the Map View, click on a job or service appointment.
2. Choose *Open Appointment*.

Viewing and optimizing routes

You can view a resource route on the map based on their assigned schedule.

If rearranging a resource's route causes the appointment to be outside of the resource's shift, that appointment will display as red in the resource appointment list.

1. In the Map and Route Resources window, choose *Select Resource for Routing*.
2. Choose the resource.The resources that are displayed on the schedule board are listed.
3. If this is the start of the day, the start location that was set up in Admin Settings for the resource will be the first location listed.
4. The appointments are listed in the order that they display on the schedule board.
5. In this window, you have the option to:
    - Manually re-arranging the route items by dragging and dropping in the list.
    - - Add the start address as the end location.
    - - Add a lunch break and time in minutes.
    - - Remove selected item.
    - Process Route
        - - Route Current ListChoose this option to route the list as it is currently displayed. This can be with a lunch break and/or the end location added.
        - - Optimize Current ListChoose this option to have the system re-arrange the appointments to optimize the route based on resource and appointment locations.
    - - Saves the route as displayed and rearranges the appointments on the schedule board for the resource.
    - - Closes the resource routing window. If you choose to not save any changes, nothing will change for the resource schedule.

View unscheduled/unassigned appointments on map

In Schedule, you can view an unscheduled or unassigned appointment quickly on the map.

1. In Schedule, in the Unscheduled section, right-click on an unscheduled or unassigned appointment.
2. Choose *View on Map*.

> *View on Map* is always available for appointments where the technician ID is currently set to UNASSIGNED and for unscheduled appointments, where the technician ID is assigned, as long as the map is currently open and filtered for routing that same technician ID. Unscheduled appointments are only displayed when the map is filtered to a single technician.

3. The Map View window opens with the pop-up window with the appointment details displayed over the icon.

Troubleshooting

Topics within this section:

Not seeing added column in grid

If you are not seeing a column that was added in the appropriate grid, you may need to reset the grid.

Resetting the grid will reset the existing columns to the original location in the grid. Any columns that have been moved by dragging will be reset. This will *only* affect the workstation and current browser.

To reset a grid, choose the *Menu* icon and then choose *About*.

1. Choose the grid name from the **Reset Grid** drop-down.
2. Choose *Reset*.

Resource has an invalid current location

If a resource doesn't have all components set up for using Mapping, you will receive a message that states "Resource <first name> has an invalid current location. Make sure resource setup is complete in Setting up resource options on page 12 and then run process **Process Resource Home Locations**.

- Verify that you have the resource options set up for your resource in *Schedule Administration* > *Resource Options.*
- Verify that Vehicle Setup has been completed for each technician in Signature Service Management. *Microsoft Dynamics GP* > *Tools* > *Setup* > *Service Management* > *Lookup Setup* > *Technicians* > *Vehicles*
- If the above options have been set up correctly and you are still seeing the error message, in Schedule go to *Administration* > *Process Requests* and choose *Get Latitude/Longitude*.

For more information see Map View setup on page 11.

Schedule board isn't updating

Refresh the Schedule Board

You may need to choose the *Refresh* icon to display updates to the schedule board.

System seems slow

Clearing the cache

If you notice that it is taking more time for windows to open or that the windows don't update even after you have refreshed the window, you may need to clear the cache.

1. In Schedule, choose the *Menu* icon and then choose *About*.
2. Depending on where you have noticed a slowdown, choose *Clear Customer Hub Cache* and/or *Clear Application Cache*.

Contact Information

Support

Phone: 262-317-3800
Email: support@wennsoft.com[4]
Hours: Normal support hours are 7:00 a.m. to 6:00 p.m. Central Time. After-hours and weekend support is available for an additional charge. Please contact WennSoft Support for additional information.

WennSoft will be closed in observance of the following holidays: New Year's Day, Memorial Day, Juneteenth, Independence Day, Labor Day, Veteran's Day, Thanksgiving Day, the day after Thanksgiving, Christmas Day, and the day after Christmas.

Support Plans

We're committed to providing the service you need to solve your problems and help your team maximize productivity.

We offer several Signature Enhancement and Support Plans to meet your needs and Extended Support Plans for retired product versions available at https://www.wennsoft.com/wsportal[5].

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