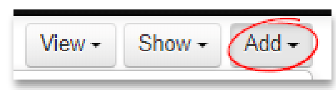
eci | ThermoGrid®

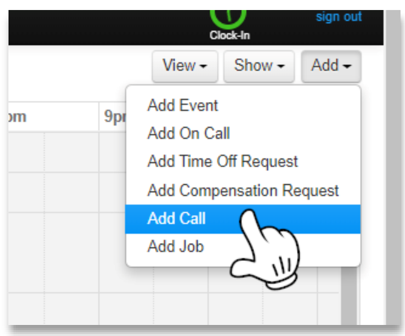
Office Staff – Dispatching

1. Clock in for the day with **Daily Timekeeping** on the top right
   (Green is Clocked-Out, Red is Clocked-In)

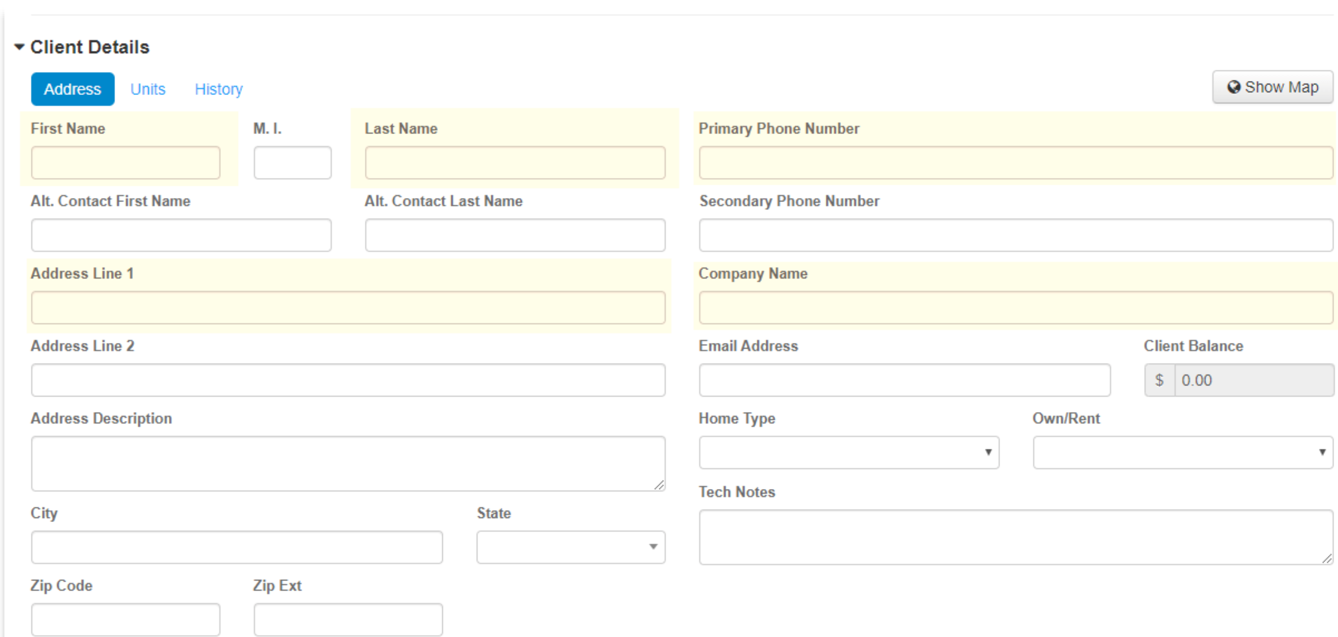
2. When you receive a Phone call from a Client, Click on **Add**

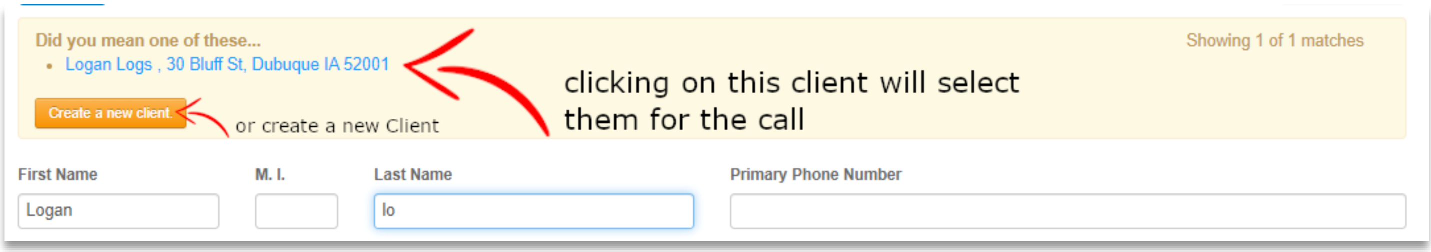


   And Chose **Add Call**



3. Use the provided **Client Detail** fields to Search for the **Client.**
   Hit enter or click out of the input field to start the search





4. Scroll down or collapse the Client Details and Enter the **Call Details**
    a. **Call Description:** What does the Client want?

(EX: What is the problem? How old is the unit? Where is the leak? Where is the replacement?)

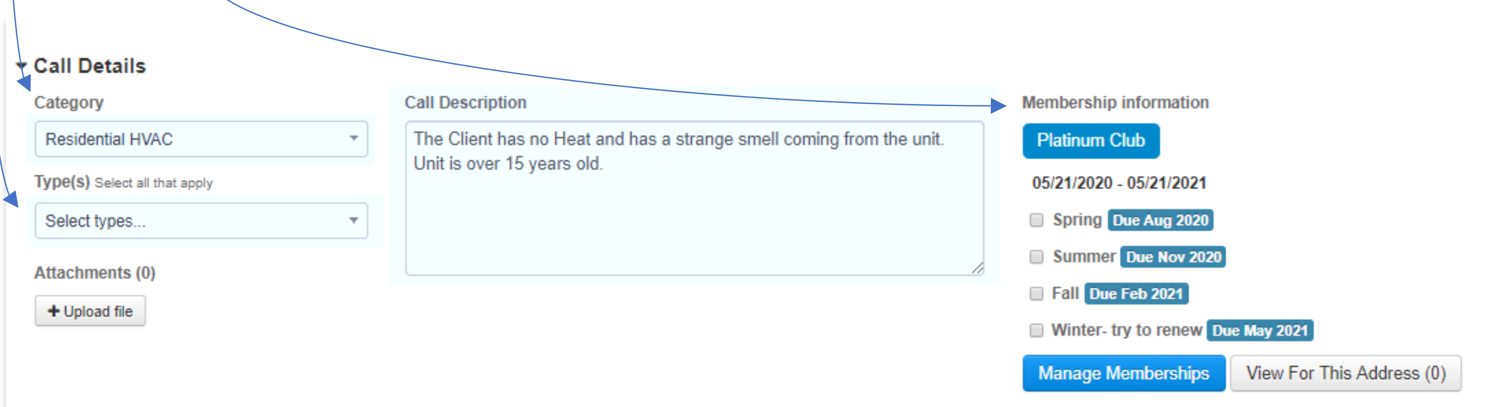
    b. **Category:** The Category of service that your company is providing for this call. This will track Revenue in your DMR

(EX: Electrical, Plumbing, HVAC, Lawn-Care)

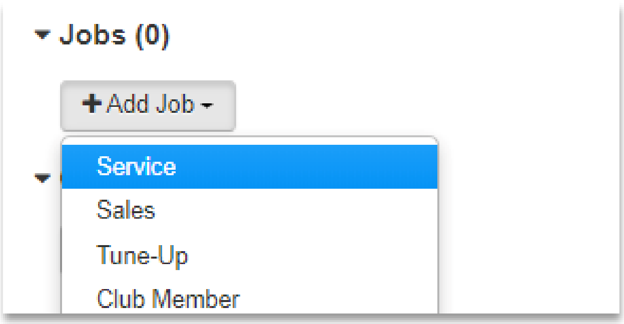
    c. **Type(s):** What Type of Call is this? This tracks our Conversion Ratio on a Call.

(EX: Service Inbound, Club Sales, Sales Outbound)

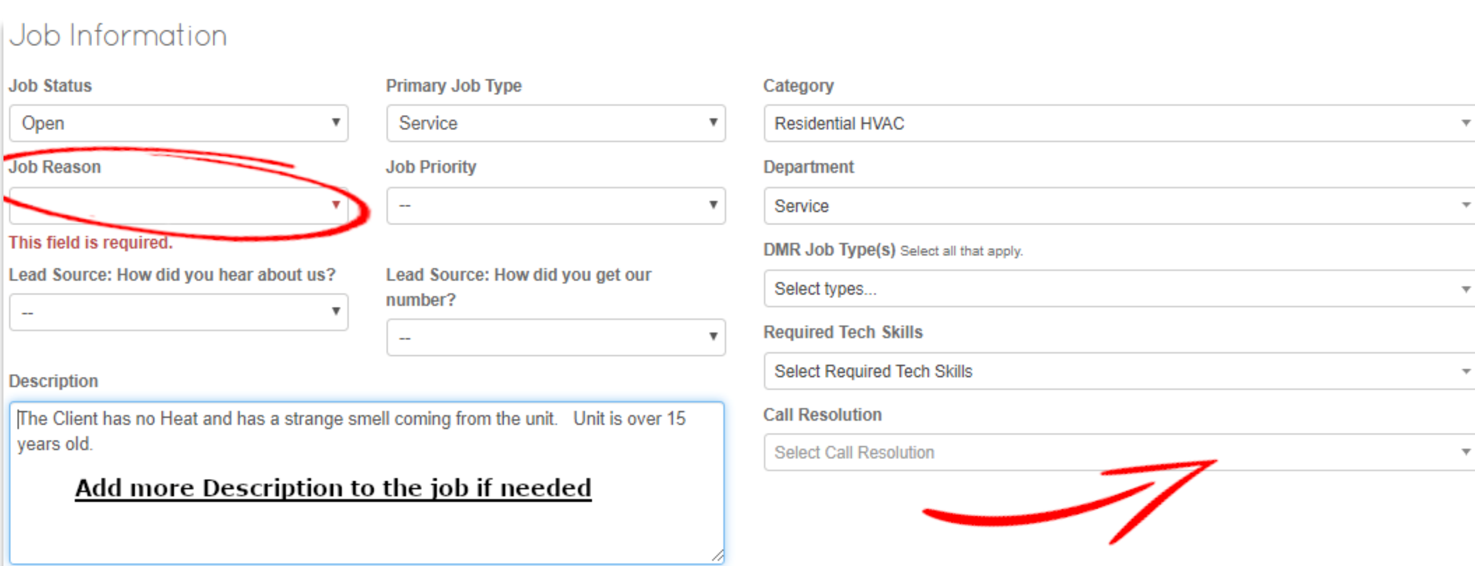
    d. **Membership information:** shows if Client has membership tied to any units at this address, you can choose if the Visits for this membership will be fulfilled with this job.



5. Click **Add Job** and Select the **Primary Job Type**

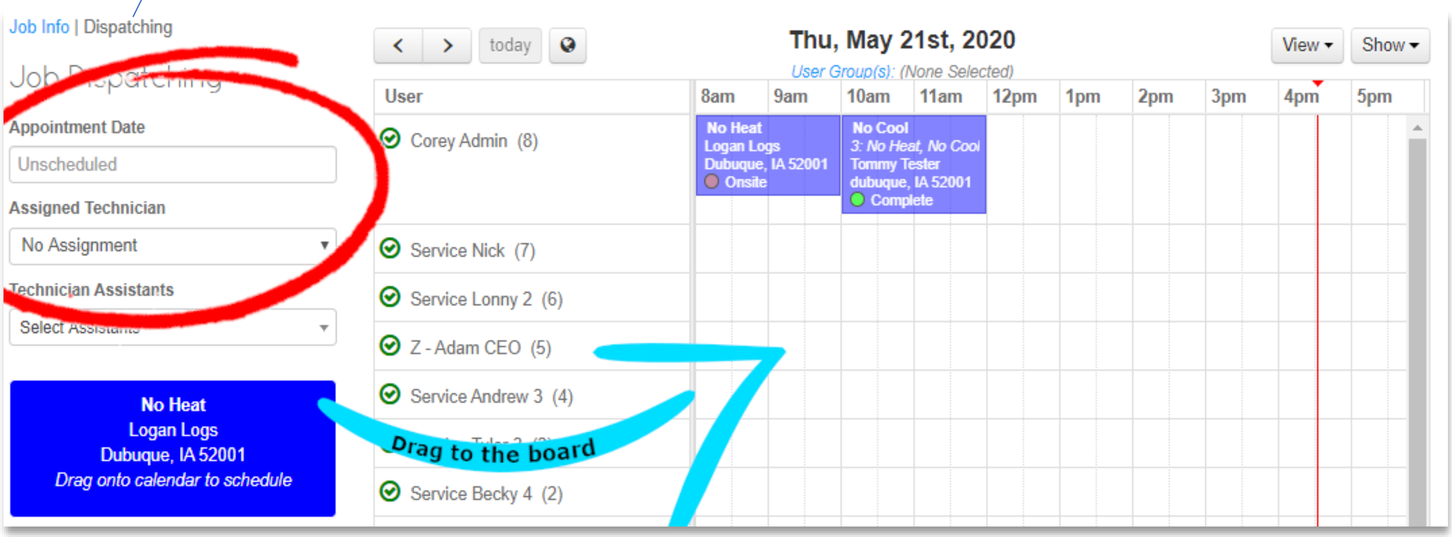


6. **Enter Job information**
   a. **Job Status –** *prepopulated from call screen*
   b. **Primary Job Type -** *prepopulated from call screen*
   c. **Job Reason –** Why are we going to the **Job?** (Ex: No Heat, Leak, ect… Also, this is what the Field Tech/Rep will see on the calendar)
   d. **Job Priority –** urgency of **Job** (Can be used as an extra info field about the Job as well)
   e. **Lead Source**
      i. How did you hear about us?
      ii. How did you get our number?
   f. **Category -** *prepopulated from call screen*
   g. **Department -** *prepopulated from call screen*
   h. **DMR Job Types – DMR** Opportunities on this **Job**
   i. **Required Tech Skills – Skills** needed by Tech to perform **Job**
   j. **Call Resolution –** Most Calls will be **Booked,** but there are other options for call outcome



Note: None of the Drop-Downs *need* to be filled in. But to be able to run reporting properly, you will need to fill in the necessary fields required by your company.

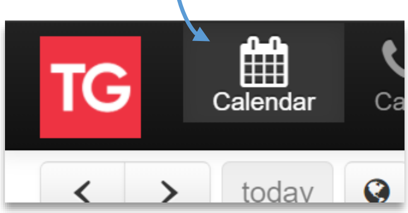
7. Click on **Dispatching**



8. In **Dispatching** you have the option of Dragging the Job directly on to the Calendar or Scheduling an **Appointment Date** and Assigning a Technician.

9. Click on **Calendar** and prepare for the next **Call**

The Assigned Technician to a Job will have all metrics tracked under them, show as the primary and Commission will be based off of this Techs Commission Structure.



VOIP USERS ONLY

*If you are using VoIP: The **Call** will come in on the right-hand side of the screen, Answer and Create a new **Call.** This New **Call** will match the phone number to a client if it exists in ThermoGrid.