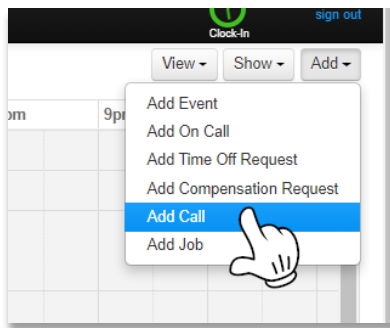
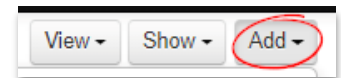


Office Staff – Dispatching

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

▼ Client Details

Address Units History Show Map

First Name	M. I.	Last Name	Primary Phone Number
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Alt. Contact First Name		Alt. Contact Last Name	Secondary Phone Number
<input type="text"/>		<input type="text"/>	<input type="text"/>
Address Line 1	Company Name		
<input type="text"/>	<input type="text"/>		
Address Line 2	Email Address	Client Balance	
<input type="text"/>	<input type="text"/>	\$ 0.00	
Address Description	Home Type	Own/Rent	
<input type="text"/>	<input type="text"/>	<input type="text"/>	
City	State	Tech Notes	
<input type="text"/>	<input type="text"/>	<input type="text"/>	
Zip Code	Zip Ext		
<input type="text"/>	<input type="text"/>		

Did you mean one of these... Showing 1 of 1 matches

- Logan Logs , 30 Bluff St, Dubuque IA 52001

[Create a new client](#) or create a new Client

clicking on this client will select them for the call

First Name: Logan M. I.: Last Name: lo Primary Phone Number:

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.

Call Details

Category: Residential HVAC

Type(s) Select all that apply: Select types...

Attachments (0): + Upload file

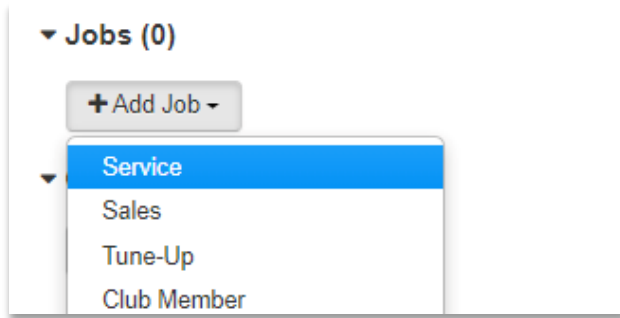
Call Description: The Client has no Heat and has a strange smell coming from the unit. Unit is over 15 years old.

Membership information: Platinum Club, 05/21/2020 - 05/21/2021

- Spring Due Aug 2020
- Summer Due Nov 2020
- Fall Due Feb 2021
- Winter- try to renew Due May 2021

Manage Memberships View For This Address (0)

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

Job Information

Job Status Open	Primary Job Type Service	Category Residential HVAC
Job Reason <i>This field is required.</i>	Job Priority --	Department Service
Lead Source: How did you hear about us? --	Lead Source: How did you get our number? --	DMR Job Type(s) Select all that apply. Select types...
Description [The Client has no Heat and has a strange smell coming from the unit. Unit is over 15 years old. Add more Description to the job if needed		Required Tech Skills Select Required Tech Skills
		Call Resolution Select Call Resolution



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.

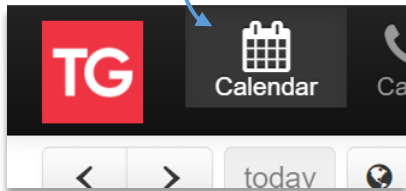
7. Click on **Dispatching**



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.

