

FOUNDATION® for Windows®

# SERVICE DISPATCH

COMPLETE SCHEDULING AND MANAGEMENT

The screenshot displays a scheduling grid with columns for time slots (1:00, 2:00, 3:00, 4:00, 5:00) and rows for different technicians. The grid contains various call statuses such as 'Lunch', 'Travel', 'Vacation', and 'Not Billed'. Below the grid, there is a section for 'Working At' with a dropdown menu showing 'Erie Kinley' and a 'Technician' dropdown menu.

	1:00	2:00	3:00	4:00	5:00
Not Billed Panera Bread 345 Pearl Rd Strongsville	Lunch	Billed Rickshaw Courts 17912 Main St Cleveland		Not Billed City Hall 34300 Pearl Rd Strongsville	Previous Call Continued
Previous Call Continued	Lunch	Travel	Not Billed Smith Household 768 Boston Rd North Royalton	Previous Call Continued	
Not Billed Danders Corp. 23 Marks Rd Brunswick	Lunch	Not Billed McDonalds - #77 2012 Medina Line Medina	Previous Call Continued	Previous Call Continued	Previous Call Continued
Previous Call Continued	Lunch		Not Billed Southpark Mall 908 Royalton Rd Strongsville		
Vacation	Vacation	Vacation	Vacation	Vacation	Vacation
Billed Danders NE 5436 Holiday Ln Solon	Previous Call Continued	Lunch	Not Billed Pargason Force 7867 W. 130 St Hinkley		

Working At: BP Gas Station, Brunswick; Vlatzenberger Residence  
Technician: Erie Kinley



AMERICA'S #1

CONSTRUCTION  
ACCOUNTING  
SOFTWARE

 **FOUNDATION**  
software

# SERVICE DISPATCH



**MANAGE YOUR SERVICE JOBS** Providing quality service as efficiently as possible...that's every service contractor's goal. But it's not that easy. The daily grind of assigning calls; organizing schedules; tracking contracts, warranties and inventories; plus billing for a busy service department can get overwhelming. FOUNDATION for Windows Service Dispatch module was designed to simplify these tasks...giving you complete control over all service processes.

Using a colorful, interactive dispatch board, your dispatcher can easily assign and schedule new calls; extend, shorten, or cancel appointments; and change technicians with a single drag-and-drop, as well as instantly forward important updates and mapping information.

After the call closes, billing information can be entered through Service Dispatch, automatically updating both the Accounts Receivable and Inventory modules for seamless and timely receivables management.

**SEND MESSAGES to your service technicians!**



Complete The Service Call for - Dispatch = 000 000 1204 - Rick Stevens 330-635-8365

Scan View **Text** Map Print Bill Save Close Follow Up

Unique ID: 000 000 1260 Date Of Call: 05/11/2009 Contract No: [blank]  
 Dispatch: 09268 01103 Time Of Call: 9:00 Job No: DISPATCH

Working At: Italian Eatery Billing: Italian Eatery Purchase Order: [blank]  
 Who Called: Italian Eatery Completed: Yes\* No [blank]  
 Phone: 3304405643 Description Of Repair: HVAC Unit was broken - fan replacement. Called Craig Allen for additional assistance. Replaced fan, fuse, and replaced 3 stripped tube nuts. HVAC Unit is working properly.  
 Address: 345 Center Road City: Strongsville Work Requested: HVAC Unit is not working throughout entire building. Notes Or Directions: Italian Eatery is located next to the Hillsboro Plaza on Center Rd. It is a separate building - not part of the plaza.  
 Type Of Repair: Repair Technicians: Rick Stevens

Follow Up On: 00/00/0000 Scheduled On: 05/11/2009 Date Of Arrival: 05/11/2009 Time Of Arrival: 9:00 Departure: 11:00  
 Straight Hours: 3:00 Overtime Hours: 0:00 Double Hours: 0:00  
 Warranty: Yes [ ] No [ ] Billed: Yes [ ] No [ ] AR Invoice No: [blank]

Service Dispatch - [Schedule Service Calls for May 11, 2009]

	8:00	9:00	10:00	11:00	12:00	1:00	2:00	3:00	4:00	5:00
<b>Rick Stevens</b>		Not Billed Italian Eatery 345 Center Rd Strongsville	Previous Call Continued	Previous Call Continued	Not Billed Panera Bread 345 Pearl Rd Strongsville	Lunch	Billed Richshaw Courts 12912 Main St Cleveland		Not Billed City Hall 34300 Pearl Rd Strongsville	Previous Call Continued
<b>Craig Allen</b>	Billed Debbie Allen 077 Lorain Rd Lorain		Not Billed Paul Stevenson 234 Marks Rd Medina	Previous Call Continued		Lunch	Travel	Not Billed Smith Household 768 Boston Rd North Royalton	Previous Call Continued	
<b>Emil Keney</b>	Not Billed Applebees - #56 546 Royalton Rd Strongsville			Not Billed Danders Corp. 23 Marks Rd Brunswick	Not Billed Target Plaza 5463 Royalton Rd North Royalton	Lunch	Not Billed McDonalds - #77 2012 Medina Line Medina	Previous Call Continued	Previous Call Continued	Previous Call Continued
<b>Greg Hamilton</b>	Not Billed Radio Shack 567 Center Rd Brunswick	Billed Home Depot - #21 2342 Center Rd Brunswick	Not Billed Panera Bread 345 Pearl Rd Strongsville	Previous Call Continued		Lunch		Not Billed Southpark Mall 908 Royalton Rd Strongsville		
<b>Arthur Cashman</b>	Vacation	Vacation	Vacation	Vacation	Vacation	Vacation	Vacation	Vacation	Vacation	Vacation
<b>Alex Roberts</b>		Not Billed Debbie Allen 077 Lorain Rd Lorain		Billed Danders NE 5436 Holiday Ln Solon	Previous Call Continued	Lunch		Not Billed [blank]		

Unassigned Dispatches for May 11, 2009

Who Called	Phone	Address	City	Work Requested	Works
BP Gas Station, Brunswick	4403302342	103 Pearl Rd	Brunswick	Repair HVAC Unit	BP Gas Station, Brun
Katzenberger Residence	3305436979	2300 Roland Blvd	North Royalton	Install Garage Lighting and Generator	Katzenberger Reside

*schedule & view service calls on the drag-and-drop DISPATCH BOARD*

**quick and easy BILLING!**

Complete The Service Call for - Dispatch = 000 000 1236

Equip Contract New Delete Billing Date: 05/20/2009 AR Invoice No: WORKING AT: McDonalds BILLING: McDonalds

Qty	Description	Price	Amount	Tax
2.0	Emil Keney Labor	45.00	90.00	[ ]
1.0	Craig Allen Labor	40.00	40.00	[ ]
	<b>Total Labor Cost</b>		<b>130.00</b>	
22.0	22 LF #10 Bare Solid Wire	3.00	66.00	[ ]
2.0	2 LF Fuse	2.50	5.00	[ ]
3.0	3 1/4" Tube Nuts	9.00	27.00	[ ]
	<b>Total Material Cost</b>		<b>98.00</b>	
1.0	Replace Fan in HVAC Unit,Trane AQUA STREAM	299.00	299.00	[ ]
	<b>Total Equipment Cost</b>		<b>299.00</b>	
	<b>Total Cost</b>		<b>527.00</b>	

Dispatch Billing Totals

Description	Amount
Taxable Base	527.00
Tax	22.40
<b>Total Billings</b>	<b>527.00</b>
<b>Total</b>	<b>549.40</b>

Cuyahoga County Tax 4.25

Payments Collected

Check	Date	Amount	P/D
00/00/0000		0.00	
00/00/0000		0.00	
00/00/0000		0.00	
00/00/0000		0.00	

Payments / Invoice

# FOUNDATION® for Windows® Service Dispatch module features:

## Interactive Dispatch Board

- ⊕ Customize the dispatch board – change colors, headings, call information, and more
- ⊕ Color code calls to visually distinguish between call priority, service type, technician, or status
- ⊕ Organize schedules using time or number slots
- ⊕ Extend, shorten, or reschedule calls with a simple drag-and-drop
- ⊕ View and schedule unassigned calls directly from the dispatch board

## Complete Call Scheduling and Management

- ⊕ View completed vs. uncompleted calls
- ⊕ Track and display arrival time and completion for each service call
- ⊕ Set up recurring service calls and follow-ups in advance
- ⊕ Track and manage daily schedules, types of service, and unassigned dispatches
- ⊕ Create single or multiple sites
- ⊕ Look up sites by name, address, or other criteria

## Analyze Profitability

- ⊕ Track profit by location, service type, technician, and customer
- ⊕ View billed vs. unbilled jobs

## Dispatch Communications

- ⊕ Send e-mails or text messages directly to technicians
- ⊕ Coordinate routes and electronically deliver mapping and routing instructions

## Reporting and Tracking

- ⊕ Track service contracts (contract information, contract types, and expiration dates)
- ⊕ Track warranties on installed equipment
- ⊕ Manage inventory (track quantities, prices, and reorder points)
- ⊕ Track equipment installed at customer sites (install date, last date inspected, next inspection date)
- ⊕ Track maintenance schedules for service vehicles
- ⊕ Print dispatches and work orders
- ⊕ Create custom invoice designs



## How it Works

Simplify your service call workflow

### 1. CUSTOMIZE DISPATCH BOARD

You have control over your service dispatch settings; easily format your dispatch board with the information you need to see! Change colors, headings, call information, and other default settings.

### 2. SCHEDULE NEW CALLS

Simply click an open time slot on the dispatch board to schedule a call, and use a "quick find" list to locate caller information by name, address, phone, etc.

### 3. CREATE & TRACK WORK ORDERS

Create, distribute, and track work orders directly from the dispatch board. Easily inform your technicians of their day's work, and send messages and mapping instructions from the call detail screen.

### 4. EDIT CALLS AS NECESSARY

Extend, shorten, cancel, and reschedule appointments with the simple drag-and-drop dispatch interface.

### 5. TRACK EQUIPMENT USED

The system tracks equipment installed at customer sites, as well as warranties and scheduled maintenance dates.

### 6. INVOICE COMPLETED CALLS

For completed calls, create custom designed invoices directly from the dispatch board! Your billing seamlessly integrates with receivables and accounting.

800-246-0800  
www.foundationsoft.com



[www.foundationsoft.com](http://www.foundationsoft.com)

**FOUNDATION<sup>®</sup> for Windows<sup>®</sup>**  
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