

This is an image of the primary interface in ServiceDesk. As shown, an operator is in the process of taking a service order from a telephone caller. She's typed in the caller's name, and moved into the second line to begin typing the address. As she began typing the street-name portion of the address, a drop-down list appeared, which instantly updates (as she types) to display only those particular streets that match whatever sequence of characters, as part of the street name, she's typed at any instant in time (the list includes abbreviations for the city to which each street belongs, applicable zip code, and grid-reference for the locally-used map). When she sees the street she wants, she can select it, and the system will instantly insert all applicable data (i.e., full street name, city name, zip code, map-grid reference, etc.) into appropriate spaces of the callsheet.

Sat, 3:03 pm

Aardvark Appliance Service

Feb 24, 2001

File Functions

Command Summary

Dispatch Operations

Work In Progress

Parts Management

Periodic Reports

ItemFind

TimeClock

AcntsRcvbl

SalesView

DspothMap

SchdList

JobsCrmt

PartOrders

SlsEnter

Inventory

PrdcRpts

DbaseSrch

Num Lock ON

Cap Lock ON

Ins ON

Call Sheet # 1

DOE, JOHN

123 SOM

Customer

SOMBRAS

SOMBREADO

SOMERLY

SOMERSET

SOMERSET

SOMERSET CIR

MU 92692 922C5

SC 92673 972F5

MU 92692 922D5

TC 92679 893D3

MU 92692 922E1

DP 92629 971E2

Location Name, Address and Phone numbers

Item(s) Type

Item(s) Make

Date and Time

Problem to be solved, and/or Description of Customer's Request

More info?

Empty

Active Desk

My own

Another's

Status

Current

Hibernate

deLeTe

Job/Sale

othrws Dn

Originated:

GR 11:43 am

Sat 2/24/01

Call Sheet # [unassigned]

Customer Name, Address and Phone numbers

Location Name, Address and Phone numbers

Item(s) Type

Item(s) Make

Date and Time

Problem to be solved, and/or Description of Customer's Request

More info?

Empty

Active Desk

My own

Another's

Status

Current

Hibernate

deLeTe

Job/Sale

othrws Dn

Originated:

Call Sheet # [unassigned]

Customer Name, Address and Phone numbers

Location Name, Address and Phone numbers

Item(s) Type

Item(s) Make

Date and Time

Problem to be solved, and/or Description of Customer's Request

More info?

Empty

Active Desk

My own

Another's

Status

Current

Hibernate

deLeTe

Job/Sale

othrws Dn

Originated:

Call Sheet # [unassigned]

Customer Name, Address and Phone numbers

Location Name, Address and Phone numbers

Item(s) Type

Item(s) Make

Date and Time

Problem to be solved, and/or Description of Customer's Request

More info?

Empty

Active Desk

My own

Another's

Status

Current

Hibernate

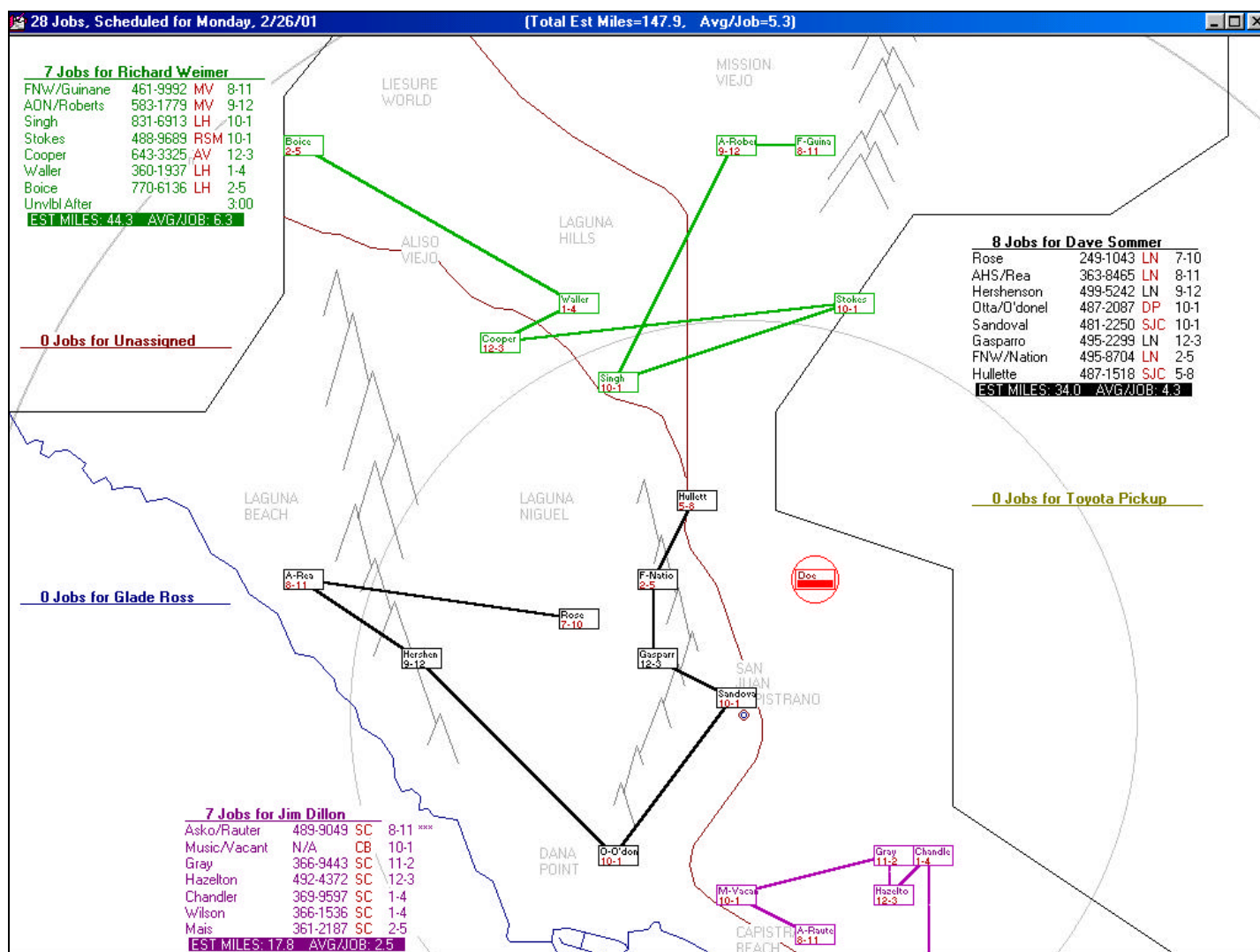
deLeTe

Job/Sale

othrws Dn

Originated:

After all the basic order information was typed (or inserted via ServiceDesk assistance) into the callsheet (probably took about 20 seconds), the next task was to work-out an appointment for the service call. For this purpose, the operator used her mouse to right-click on the customer's address-line (as created in the callsheet, see last illustration). When she did so, the following image appeared. We call it the DispatchMap. It's a customized sketch of any client's actual service territory (only a portion of the map shows in this particular screen), and on it each job for a given day is graphically displayed in its correct location, color-coded for the tech assigned, and so on. Plus, to assist in the immediate task of scheduling the present caller, the system has flagged his location in bright-red, with a circle around it. Thus, it's very easy for the operator to deduce a sensible appointment for him.



In this image we've completed usage of the first callsheet to create that job, appointment, and so on (plus, the system printed-up a service ticket for it, the whole transaction requiring perhaps 45 seconds). Now, a new caller is on the line, asking for service. As we began typing in their name, a list popped up (over on the right-side of our new callsheet), referencing each of the jobs previously done for this customer. We then were able to select from among those listings to instantly see a history of each such job (in blue above). In the current image we've selected (and are viewing) the fourth job in the list. Besides using this list to review such past jobs, we can also use it to instantly insert the present caller's full name, address and telephone numbers into our new callsheet order.

Sat, 3:27 pm-----Aardvark Appliance Service-----Feb 24, 2001
File Functions
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PartOrders
SlsEnter
Inventory
PrdcRpts
DbaseSrch
Num Lock ON
Caps Lock OFF
Ins ON

Call Sheet # 1
Call Sheet # [unassigned]

Job/Invoice # 49239, Archived Item # 13062 out of 32903

AMERICAN HOME SHIELD
S.W.O. # 13746404

P.O. BOX 866
CARROLL, IOWA 51401
800-326-4357
800-827-4636

Customer Name, Address and Phone numbers

JOHNSTON, FRED AND SHIRLEY
\$35 DEDUCTIBLE

212 MONARCH BAY DR [971E4]
DANA POINT
499-4234

Location Name, Address and Phone numbers

Item(s) Type
Item(s) Make
Date and Time

OVEN
JENNAIR
21 MON 1-2:30

Problem to be solved, and/or Description of Customer's Request
TOUCH PANEL STILL IS NOT WORKING PROPERLY
POSSIBLE SALES FEE DUE

Display Basis
First page
Middle page
Last page
find Name
find Address
find Telephn
P.Q. # Srch
Street Srch
Invc # Srch

Originated:
BN 10:59 am
Mon 7/21/97

More info?
Empty

7/21/97 11:19 am: Printed to invoice by BN. Scheduled for 21 MON 1-2:30
7/21/97 1:17 pm: Dispatched to GR
7/22/97 8:59 am: GR was there on 21 MON from 2.00 to 2.35, unable to replicate failure, holding invoice open for few days
7/24/97 7:43 am: BN scheduled for 24 THURS 9-12
7/24/97 9:51 am: Dispatched to GR
7/25/97 10:33 am: GR was there on 24 THURS from 9.40 to 10.00, disconnected probe jack from computer (had erroneous non-perfect open across conductors). Job Completed.
7/25/97 11:16 am: BN recorded billed completion in Sales Journal, total \$83.00

Active Desk
My own
Another's

Status
Current
Hibernate
deLeTe
Job/Sale
othrws Dn

Originated:

More info?
Empty

Call Sheet # 2

JOHNSTON, F

Customer Name, Address and Phone numbers

Location Name, Address and Phone numbers

Item(s) Type
Item(s) Make
Date and Time

Problem to be solved, and/or Description of Customer's Request

Active Desk
My own
Another's

Status
Current
Hibernate
deLeTe
Job/Sale
othrws Dn

Originated:
GR 3:15 pm
Sat 2/24/01

More info?
Empty

JOHNSTON, FRED
212 MONARCH BAY
499-4234
JOHNSTON, FRED
212 MONARCH BAY
499-4234
JOHNSTON, FRED
212 MONARCH BAY
499-4234
JOHNSTON, FRED
212 MONARCH BAY
499-4234
JOHNSTON, FRED
212 MONARCH BAY
499-4234

Active Desk
My own
Another's

Status
Current
Hibernate
deLeTe
Job/Sale
othrws Dn

Originated:

More info?
Empty

Here we are making a report to the system regarding what happened on a particular dispatched appointment in connection with the displayed JobRecord. This reporting system works in a dialog fashion, asking the operator a series of questions (what time did the tech start, what time did he finish, what were his findings and actions, does he need to order any non-stock parts, did he use any items out of normal stock, did he collect any funds [if so what kind and for how much], etc.).

Ideally, we think it's best for technicians to make these reports themselves (the interface is designed to make it practical and safe). However, if that doesn't work for you, it's also made to be practical for an office person to make the reports for the technicians.

ServiceDesk, TechWindow Mode

File Functions Command Summary Dispatch Operations Work In Progress Parts Management Periodic Reports

Technician Interface, Glade Ross Reporting

Work in Progress, Post-dispatch Reporting

Did we — on this visit — use any parts from stock?

Yes
No
Backup
Exit

Job/Invoice # 68588, Record Number 14

FIRST AMERICAN P.O. # 02878002	
P.O. BOX 10180	
VAN NUYS, CALIFORNIA 91410 (300.00)	
800-553-6699	800-992-3400
ESPOSTI, GLORIA \$00 DEDUCTIBLE	
1384 PACIFIC AV [950H2]	
LAGUNA BEACH	
376-1944	714-612-1518

Customer Name, Address and Phone numbers

Location Name, Address and Phone numbers

Item Type(s)	Item Make(s)	Date and Time
MICROWAVE	THERMADOR	8 MON 8-11

Problem to be solved, and/or Description of Customer's Request

DOUBLE OVEN WITH MICROWAVE, MW NEEDS REPAIRS
PROBABLY WILL NEED 2 TECHS!

Status of Job

☐ Working to Schedule
☐ Currently scheduled
☒ Dispatched to Tech
☐ Tech rptd, not done
☐ Waiting for Parts
☐ Pending Authorization
☐ Other
☐ Completed

☐ Recorded to SlsJnl
☐ Marked for Deletion

Originated:
BN 2:51 pm
Thu 1/4/01

More info?
Yes

Find by:

☐ Invoice #
☐ Name
☐ Address
☐ P.O. #

Potential actions, this record:

☐ *UIS # 2946* ☐ add to History
☐ enter Funds rcvd ☐ Scheduling
☐ order parts ☐ Print options

run arch/e routine, whole file Exit

1/5/01 12:21: BN: schldd for 8 MON 8-11
1/8/01 9:30: Dspchd to GR
1/10/01 10:12: GR there 8 MON, 11:22 to 12:32, diagnosed bad mag tube, have to cut whole in wall to get access to vent (needed to remove unit), they'll call to schedule when ready to coordinate w/drywall guy for soon-after patch job (got autho from FAM for \$430.55)
1/12/01 12:07 BN: customer is supposed to call when ready.
1/15/01 14:31 BN: Waiting for cust call back
1/17/01 12:00 BN: Imor as reminder
1/19/01 7:59 BN: still holding
1/30/01 12:20 BN: Imor/hm
2/1/01 16:10 BN: schldd for 20 TUE 9-12
2/14/01 8:27 BN: already scheduled
2/19/01 9:54 BN: chngd apmnt to 22 THU 9-11
2/22/01 9:09: Dspchd to GR
2/24/01 15:41: GR there 22 THU, 9:05 to 11:35, cut hole in sidewall to gain access, replaced mag tube

After the job is finally completed, it's time to enter the completed sale to the SalesJournal. That's where this little form comes in (we call it the "SalesEnter form") While the previously-illustrated reporting method (see last page) is designed to collect all the various particulars that are concerned with what actually *occurred* on the job (and thus collecting the info needed for related processes, such as ordering parts, restocking used ones, managing funds received, and so on), this one is concerned only with recording the fact of the completed sale, for how much, to which tech it should be credited, and the details concerning billing, if any.

Sat, 4:10 pmAardvark Appliance ServiceFeb 24, 2001

File FunctionsCommand SummaryDispatch OperationsWork In ProgressParts ManagementPeriodic Reports

ViewBckpsEarningsRtsMailListPrintClaimsSchd-ArchvSchdListJobRptsPartRqstsAppsJmlInventoryPrdcRptsTechWndw

Num LockONCaps LockOFFInsON

Call Sheet # 1

DOE, JOHN

123 SOMERSET LN [952E5]

SAN JUAN CAPISTRANO

661-3774

Customer Name, Address and Phone numbers

Active Desk

My own

Another's

Status

Current

Hibernate

deLete

Job/Sale

othrws Dn

Location Name, Address and Phone

Originated:

More info?

Empty

Call Sheet # (unassigned)

Customer Name, Address and Phone numbers

Active Desk

My own

Another's

Status

Current

Hibernate

deLete

Job/Sale

othrws Dn

Location Name, Address and Phone numbers

Originated:

More info?

Empty

Item(s) TypeItem(s) Make

REFERWESTINGHOUSE26

Problem to be solved, and/or Description of Customer's Request

NOT COLD, LEAKING WATER ON THE

Call Sheet # 2

JOHNSTON, FRED AND SHIRLEY

212 MONARCH BAY DR [971E4]

DANA POINT

499-4234

Customer Name, Address and Phone numbers

Active Desk

My own

Another's

Status

Current

Hibernate

deLete

Job/Sale

othrws Dn

Location Name, Address and Phone numbers

Originated:

More info?

Empty

Info for Accounts Receivable File

Billing name and mailing address, including zip code

FAM-Esposti [02878002]

P.O. Box 10180

Van Nuys, California 91410 (30

Attn designee, or salutation:

Accounting

Amnt Pd to date:

Date completed:

02/23/01

Since this is a home warranty company, ordinary dunning letters won't be sent. Thus, our information is formatted somewhat differently.

Cancel

Okay

GR,FAM-ESPOSTI,68588,0,191,2,45,180,430.54,2

For each completed sale, type these item's of data, each separated by a comma:

TchIntl, CstmrNm, InvcNmbr, MrchndsSlid, PrtsSlid, SCISlid, LbrSlid, TtlSlid, and PyCd

(the last item will be a "1" if presently paid or a "2" if billed)

Then press Enter to input to the list

Save

Exit

Item(s) TypeItem(s) Make

WASHERMAYTAG

Problem to be solved, and/or Description

WON'T SPIN

Call Sheet # 3

Customer Name, Address and Phone numbers

Active Desk

My own

Another's

Status

Current

Hibernate

deLete

Job/Sale

othrws Dn

Location Name, Address and Phone numbers

Originated:

More info?

Empty

