



Citrus Dispatch Center

User's Manual

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Overview

Citrus Dispatch Center is a **Service Dispatch Board Program** - When a request for service is received, the dispatcher creates a Service Slip. When a technician calls the dispatcher, a service slip is assigned to him/her from the dispatch board.

The Service Slip is set to any of a number status's.
The Slip Status manages the request for service from beginning to end.

The routines to accomplish this are:

- **Create a Service Slip**
- **Manage Service Slips**
- **Finalize Service Slips**

The Service Slip task is performed by employees or Sub-contractors, referred to as Assignments.

The routines associated with Assignments are:

- **Create Assignments**
- **Locate All Assignments**

An additional Routine exists to create a list of Services you provide. This list may already exist if you use some other Citrusware application such as Citrus Invoicer.

Getting Started

When you 1st run the program, you'll need to enter some basic information. The *Welcome Screen* will be displayed followed by the *Setup Screen* where you'll enter your **Business Information, Operations Information, and Service Slips and Invoices Items**; and select a Logo if desired.

NOTE: Some of the information may be pre-loaded if it was created using some other Citrusware program.

- **Business Information** – Company Name, Street Address, etc.
- **Operations Information** – Printing Preferences (Colors, Fonts), Work Days, Service Slip number, and Company Logo.

Operations Tab

- **Work Days** - select the days of the week your business operates.
Service will not be scheduled on unselected days
- **Phone and Modem** – if your PC has a modem card, you can use it to dial customers and assignments.
A telephone must be daisy-chained down stream from the modem. Tick the box and enter the port on which the modem will be found. This information is found in the PC control panel.
- **Printing** - select the print colors and font, and whether you wish to print in color or black only.
- **Printing Invoices** – you can choose to use Citrusware Invoices.
Tick the checkbox if you wish to print invoices for Service Slips. Tick the next box if you wish to populate the invoices. (Common Service Items and prices will pre-print in the invoice body).
Select the number of copies to print for each invoice. Select to use perforated paper to create a remittance slip on each invoice. (See Invoices in the Documents Section).
- **Taxation** - you can collect one or two Taxes. Select the Tax Headings and rates. Your invoices can have the Headings pre-printed on the invoice footer, select here.

Service Slip and Invoice Items Tab

Service Slips and invoices can have common items pre-printed. Select up to eight items to pre-print. These items come from your Inventoried Items List

Logo Tab – Your Logo is basically a picture file.

We STRONGLY REQUEST you copy your logo file to:

My Computer / Hard Drive (usually C) / Program Files / Citrusware

Your Logo file must be available to the program each time it attempts to print the Logo. If you selected your logo from a removable device or network device which is not currently available, an error will occur.

When you select the location of the logo file, a pointer file is created. If the pointer points to an offline device, the program will not run and you'll need our assistance to repair the problem.

When all setup data has been entered, return to the main menu.

The Main Menu Screen

This screen has three routine groups; *Service Slips, Files and Data* and *Assignments*.

Options that are grayed out are not available at the time.

This is usually because no file with data that is used by that routine exists at this time.

For example, if no Service Slips have been completed, the Finalize Routine will not be available.

Click the radio button for the option you wish to perform.

The menu at the top of the form allows you to edit the data on the setup screen, and order forms.

Service Slip Routines

Create a Service Slip

When a customer calls, use this routine to create a Service Slip.

Select Account

Select a customer from an existing customer list or create a new customer.

(If you own Citrusware's *Citrus Proposal* Program, and you have created proposal files, you may select the customer from the proposal data.

Select Site Address

Once the account is selected, the account address is assumed as the site service address, but you can change it as needed.

Enter the details of the Service Required

If you own any of a number of other Citrusware programs using a list of services you offer, these services will appear in a drop down list for selection into the service slip data window.

You can select any service from the list, modify it or enter anything else that describes the service required. You can not proceed without entering some service request data.

(As the service slip progresses, you can modify the service data on the service slip).

Select Technician (assignment)

The slip can be created as an "Open" slip, or "Assigned".

"Open" means the slip is created but no date or time is scheduled and the slip is not assigned to any assignment at this time.

"Assigned" means the slip has been assigned to a technician (assignment).

Open Slip

Select "None" from the dropdown list and tick the "Leave Date Blank" checkbox. Click "Create Slip"

Assigned Slip

Select an assignment from the dropdown list. (This implies you know who should provide this service). Tick the "Leave Date Blank" checkbox if you wish to schedule the slip at a later date, or select a date and time now. Click "Create Slip".

Manage Service Slips

This routine allows you to change the status of a slip, set the date and time and re-assign a slip to a different technician.

A Service Slip typically tracks as follows:

- **Open** – Service Data collected from the account, typically no date or time is selected at this point
- **Assigned** – Dispatcher determines which Assignment will respond to this Service Slip
- **In Progress** – Assignment has signed out this slip, date and time assigned
- **Suspended** – Releases the Assignment from the current slip, allowing reassignment to a different slip.

- **Completed** – Assignment has completed the slip tasks.
- **Finalized** - Dispatcher (or Office staff) has entered billing data (optional)

These operations are performed on the **Manage Service Slips** screen, **except Finalization**. When an Assignment calls the dispatch center, the slip they are currently on is **Completed**. (Status changes from In Progress to Completed). The current slip can be **Suspended**. Use this status if parts are required or some other reason the slip can not be completed at this time. The Assignment then signs out for the next Service Slip (Status changes from **Open** or **Assigned** to **In Progress**)

Finalize Service Slips

When the technician reports a task as completed, the slip can be **finalized**. In the Finalization process, you record the Invoice Number, Amount and form of payment. In you are not interested in tracking the financial aspects of the service; the slip(s) can be finalized without financial data recorded.

View Service History

The data about each slip is recorded by account, date and assignment. You can generate reports by any of these criteria.

Files and Data Routines

Create/Modify Assignments

(You must create at least one assignment in order to use the program). An assignment can be an employee, a team of employees, or perhaps a sub-contractor. An assignment is an entity to which a Service Slip will be assigned for completion.

Create/Modify Services

After completing the Setup Screen procedures, create a list of Services you offer.

The *No Services Found* prompt will display, click the **GOTO** Button. To add Services at a later time, select **Create/Modify Services** from the Main Menu. Click the **Add New** Button. Enter a service description, Cost and Time. (Time is not used by Citrus Dispatch Center.) It is a good idea to enter it now, It may be used in later applets. Click **Save Service** button.

The Assignment Routine

Locate All Assignments

This routine displays all assignments and to which Service Slip they are currently assigned. From this screen you can call the Technician's Cell Phone, Site Cell or Land Phone.

The Customer Screen

NOTE: Customer records are stored in a file named CustomerData.txt. It is a **structured text file**, which means each element within the record has a fixed length.

You can view it using any Text Editor such as Notepad, **but do not alter the contents. Modify Customer records only while viewing the Customer Record with the customer screen.**

Creating customer records

To create a new customer, click *Files* then *Add a New Customer*. The Data fields will be cleared.

If you change your mind, click *Cancel Add* and the Add routine will be exited.

A customer is either a Business or an Individual. Select the customer type 1st when creating a new customer.

Business customers have one name field, while individual customers have a title, first name, middle initial and a last name.

Customers appear in the order in which they were created.

Modifying a customer record

Simply type over the data you wish to modify. Taking any action after making changes will save the customer record.

Deleting a customer record

To delete the current customer, click the **Files Menu** then **Delete this Customer**. Click *Yes* to confirm the deletion and the customer record will be removed from the Customer File.

Finding customers

You can **Navigate** through the customer file:

- << returns to the first customer record
- < steps back one Customer from the current record
- > steps ahead one Customer from the current record
- >> steps to the last Customer in the file

You can **“Search”** for a Customer by clicking the “Search by Criteria” Button.

The “Customer Search Screen” is displayed.

Select a *Search Criteria* example - Street Address.

Enter *Search Data* example – Main St

Click Search

All customer records containing the *Search Data* in the *Search Criteria* field will be displayed in the *Customers Found grid*.

You broaden your search by decreasing the search data.

Main will produce Main St, W Main St, Main Ave, Mainland St, etc

You lessen your search by increasing the search data.

123 Main St will produce only 123 Main St

Note the difference between *by Last Name* and *by Business Name*.

Last Name finds individuals, *Business Name* finds businesses.

Searching is not case sensitive, in other words, if you enter *Smith*, all customer records with Smith or smith in the name field will be found (including Blacksmith, Smithson, etc).

Once you have selected the “Search Criteria” and entered the search data, click “Search”. Click on the customer that you wish to select and the customer record will be loaded to the customer screen.

If only one customer record meets the search criteria then it loads automatically.

If no record is found, you can create a new record at this time.

You can “**Select**” a customer by clicking “the From Name List” button.

Clicking “from Name List” displays a dropdown list on top of the Customer Name box.

This list contains all of your customers and is alphabetically sorted.

You can click the arrow on the right side and the list drops down to display all of your customers.

You can scroll through the list to find a customer and click on it to load it.

You can also start typing customer information into the top portion of the list and the next customer that contains what you have typed will be loaded. Continue to type until the correct customer loads.

Press the <TAB> key to hide the list and load the customer.

The “From Name List” button is a toggle button. Clicking it again will hide the Customer Select List.

Customer Auxiliary Data

The Toggle Aux Screen Button displays the Auxiliary Data screen where you can store unique data about each customer account. There are 6 data boxes with Headings.

The Headings apply to ALL customer accounts. (In other words, if you set Heading #1 to “Date Installed”, that’s the Heading #1 for all accounts).

The data, however, can differ for each account.

Once you decide what each data box will contain, delete the Default Heading and type a new heading. Click the Save Headings button when all new headings are entered.

As you select or create new accounts, you can enter Auxiliary Data.

The Clear buttons clear the data box to the left for the current account.

Documents – Printing Documents is optional.

Service Slips – each time a customer requests service, pertinent data is recorded; name, address, service need, etc.

This data can be printed in the form of a Service Slip.

Invoices

Reports