

i-Dispatch

Paper Is In The Past

User Manual

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i-Dispatch Terms and Conditions

Introduction

These Terms and Conditions outlined below should be read and fully understood before using the i-Dispatch website hosted software, Smart Phone Applications and Mobile Computing Applications. i-Dispatch is a mobile workforce management tool designed for businesses, corporate and government organisations. The i-Dispatch website is owned by IntelliTrac Pty. Ltd a company incorporated in the state of Victoria Australia, having its principal office at 11 Scholar Drive Bundoora Victoria 3083 Australia. ABN 31-238 398-354.

About idispatch

Business name, I-dispatch a division of IntelliTrac Pty. Ltd. ATF The Calapai Family Trust
ABN, 31238398354

Location Address, 11 Scholar Drive Bundoora 3083 Victoria Australia

Landline Telephone number, +61 39467 6188

Facsimile Number and +61 3 94667188

Definitions

"Confidential Information" includes all information exchanged between the IntelliTrac and You, whether in writing, electronically or orally, including the Software, but does not include information which is, or becomes, publicly available other than through unauthorised disclosure by the other party.

"Data" means any data inputted by you or any users of your smartphone or mobile computing device or any other computer into the Software.

"Intellectual Property Right" means any patent, trade mark, copyright, moral right, right in a design, know-how and any other intellectual or industrial property rights, anywhere in the world whether or not registered.

"Software" means the i-Dispatch software available (as may be changed or updated from time to time by IntelliTrac) via the Website or any mobile application download.

"Website" means the Internet site at the domain www.I-Dispatch.com.au or any other site operated by IntelliTrac.

"IntelliTrac" Means IntelliTrac Pty. Ltd ATF The Calapai Family Trust Trading as IntelliTrac a company incorporated in the state of Victoria Australia, having its principal office at 11 Scholar Drive Bundoora Victoria 3083 Australia. ABN 31-238 398-354

1. Overview

I-Dispatch is a mobile workforce job dispatch application from IntelliTrac. You understand and agree that the Software licence is provided on a monthly or other periodical prepaid subscription on a per user basis.

Users are categorised as Office Users and Mobile Users. An individual licence is required only for each Mobile User.

The Software and Website is provided on an "as is" and "as available" basis. IntelliTrac disclaims all responsibility and liability for the availability, timeliness, security or reliability of the Software.

IntelliTrac also reserves the right to modify, suspend or discontinue the Software with or without notice at any time and without any liability to you.

It is Your responsibility to ensure that Your data is exported to your local personal computer and backed up regularly.

2. Use of Software

You agree that you are responsible for your own communications, internet connectivity, internet fees and mobile data fees and for any consequences thereof.

You agree that you will use the Software in compliance with all applicable local, state, national, and international laws, rules and regulations, including any privacy laws and laws relating to the export of data from your country of business.

You agree that you will not use the Software to upload or distribute any content that infringes upon another party's intellectual property rights or other proprietary, contractual or fiduciary rights or obligations or is unlawful, defamatory, abusive, fraudulent, contains viruses, or is objectionable as may be reasonably determined by IntelliTrac.

You agree that you will not authorize or encourage any third party to use the Software to upload or distribute any content that infringes upon another party's intellectual property rights or other proprietary, contractual or fiduciary rights

or obligations or is unlawful, defamatory, abusive, fraudulent, contains viruses, or is objectionable as may be reasonably determined by IntelliTrac.

You agree that you will not tamper with or encourage others to tamper with the Software in order to prevent others from using the Software.

You agree that you will keep safe your online username and password and will not disclose it to others.

You agree that you will use the software in accordance with user manuals available online from within the software.

You agree that you must maintain all software including antivirus and spyware on all computers, smartphones and mobile computers using the Software and provide a suitable internet connection.

3. Software Availability and Support

IntelliTrac will aim to provide software availability of 99.97% uptime. However IntelliTrac will not and cannot be held liable for data loss.

IntelliTrac will make all efforts to prevent disruptions to the software during normal business hours and during any software any upgrades, however there may be times when the Website and or the Software is inaccessible. Updates and upgrades are scheduled to avoid peak usage times based on Australian Eastern Standard Time Zones GMT+10 or ADST GMT+11.

IntelliTrac is committed to providing excellent customer service and we aim to answer most online support issues within 4 business hours GMT+10 AEST or GMT+11 ADST, however, IntelliTrac makes no guarantee on the period of time before support is provided.

4. Payment

In return for a pre-paid monthly | quarterly | 6 monthly or yearly fee per user, IntelliTrac will provide the Software on a per user basis.

You must pre-pay your user licence fees, you must pay this fee regardless of whether you intend to use the software on each day of the pre-paid period. A credit or refund cannot be claimed if you have not used the software during any portion of the prepaid period.

Payment is strictly by an online payment gateway. Payment will start the day that you place this order. The first payment will be a pro-rata charge for the remaining portion of the monthly billing cycle. Billing is generated and payment is due on the first day of each month or other payment cycle by selection.

If you do not prepay your account when due IntelliTrac has the right to terminate your service within 7 calendar days and without warning.

You will be charged monthly in advance.

All Software remains the property of IntelliTrac and you have rights to use the Software and access or retrieve data only when your fees are paid in full.

5. Intellectual Property Rights

Intellectual Property Rights in the Software, the Website and any documentation relating to the Software remain the property of IntelliTrac.

Intellectual Property Rights in the Data remain your property. You must maintain copies of all Data inputted into the Software. IntelliTrac adheres to its best practice policies and procedures to prevent data loss but does not make any guarantees that there will be no loss of Data. IntelliTrac expressly excludes liability for any loss of Data no matter how caused.

6. Representations and Warranties

You acknowledge that you are authorised to use the Software and the Website and to access the information. If You are using the Software and accessing the Website on behalf of or for the benefit of an organisation then IntelliTrac will assume that You have the right to do so and that the organisation will be liable for your actions or omissions (including any breach of these Terms).

The provision of, access to, and use of, the Software is on an "as is, where is" basis and at your own risk.

You expressly acknowledge that due to circumstances often beyond the control of IntelliTrac, including (but not limited to) software viruses, power failure, electrical or topological interference, equipment malfunction, tampering by unauthorised persons and the actions and omissions by suppliers of telephone and internet services, the Software may not operate as designed. IntelliTrac does not warrant that the use of the Software will be uninterrupted or error free due

to the above factors.

It is your sole responsibility to determine that the Software meets the needs of your organisation and its use.

IntelliTrac gives no warranty regarding the Software and the Website. Without limiting the foregoing, IntelliTrac does not warrant that the Software will meet your requirements or that it will be suitable for your purposes.

To avoid doubt, all implied conditions or warranties are excluded in so far as is permitted by law, including (without limitation) warranties of merchantability, fitness for purpose, title and non-infringement.

You warrant and represent that You are acquiring the right to access and use the Software and agreeing to these Terms and Conditions of this agreement for the purposes and on behalf of a business or organisation and that, to the maximum extent permitted by law, any statutory consumer guarantees or legislation intended to protect non-business consumers in any jurisdiction does not apply to the supply of the Software, the website or these Terms.

7. Privacy

Unless the relevant party has the prior written consent of the other or unless required to do so by law:

Each party will preserve the confidentiality of all Confidential Information of the other obtained in connection with these Terms and Conditions. Neither party will, without the prior written consent of the other, disclose or make any Confidential Information available to any person, or use the same for its own benefit, other than as stated by these Terms and Conditions.

Each party's obligations under this clause will survive termination of these Terms and Conditions.

The provisions of the above clauses shall not apply to any information which:

Is or becomes public knowledge other than by a breach of this clause;

Is received from a third party who lawfully acquired it and who is under no obligation restricting its disclosure;

Is independently developed without access to the Confidential Information.

8. Limitation of Liability

To the maximum extent permitted by law, IntelliTrac excludes all liability and responsibility to You (or any other person) in contract, tort (including negligence), or otherwise, for any loss (including loss of Data, profits and savings) or damage resulting, directly or indirectly, from the use of, or reliance on, the Software.

If You suffer loss or damage as a result of IntelliTrac's negligence or failure to comply with these Terms and Conditions, any claim by You against IntelliTrac arising from IntelliTrac's negligence or failure will be limited in respect of any one incident, or series of connected incidents to the balance of your prepaid account.

If You are not satisfied with I-Dispatch, your sole and exclusive remedy is to terminate your service.

9. Termination

Your account will be automatically terminated if you do not prepay your account within seven (7) calendar days from when the account falls due.

If you breach these Terms and Conditions, IntelliTrac may at its discretion terminate your use of the Software and the Website and may also suspend for any definite or indefinite period of time, your use of the Software and the website and access to any stored data.

10. Entire Agreement

These Terms and Conditions represent the entire agreement between us in relation to the use of the Website and the Software and supersedes any prior agreement, understanding or arrangement between you and IntelliTrac, whether oral or in writing.

You may not assign or transfer any rights to any other person without IntelliTrac's prior written consent.

If any part or provision of these Terms and Conditions is invalid, unenforceable or in conflict with the law, that part or provision of the Terms and Conditions will be replaced with a provision which, as far as possible, accomplishes the original purpose of that part or provision. The remainder of this Agreement will be binding on both parties.

If either party waives any breach of these Terms, this will not constitute a waiver of any other breach. No waiver will be effective unless made in writing.

A person who is not a party to these Terms has no right to benefit under or to enforce any term of these Terms

11. Governing Law and Jurisdiction

These Terms of Use will be governed by and construed in accordance with the laws of The Commonwealth of Australia in the State of Victoria

Any claims, legal proceeding or litigation arising in connection with the software or website will be brought solely in The State of Victoria Australia, and you consent to the jurisdiction of such courts.

These Terms and Conditions apply to the entire content of the website at www.i-dispatch.com.au, i-Dispatch.com.au, i-dispatch.net.au and i-Dispatch.net, and the respective smartphone and mobile computing applications.

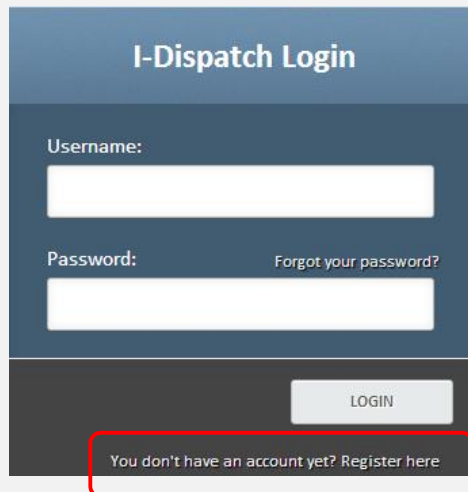
By registering and using the website and respective smartphone and mobile computing applications you agree to and accept the terms and conditions of use.

Office User

Chapter 1: Getting Started

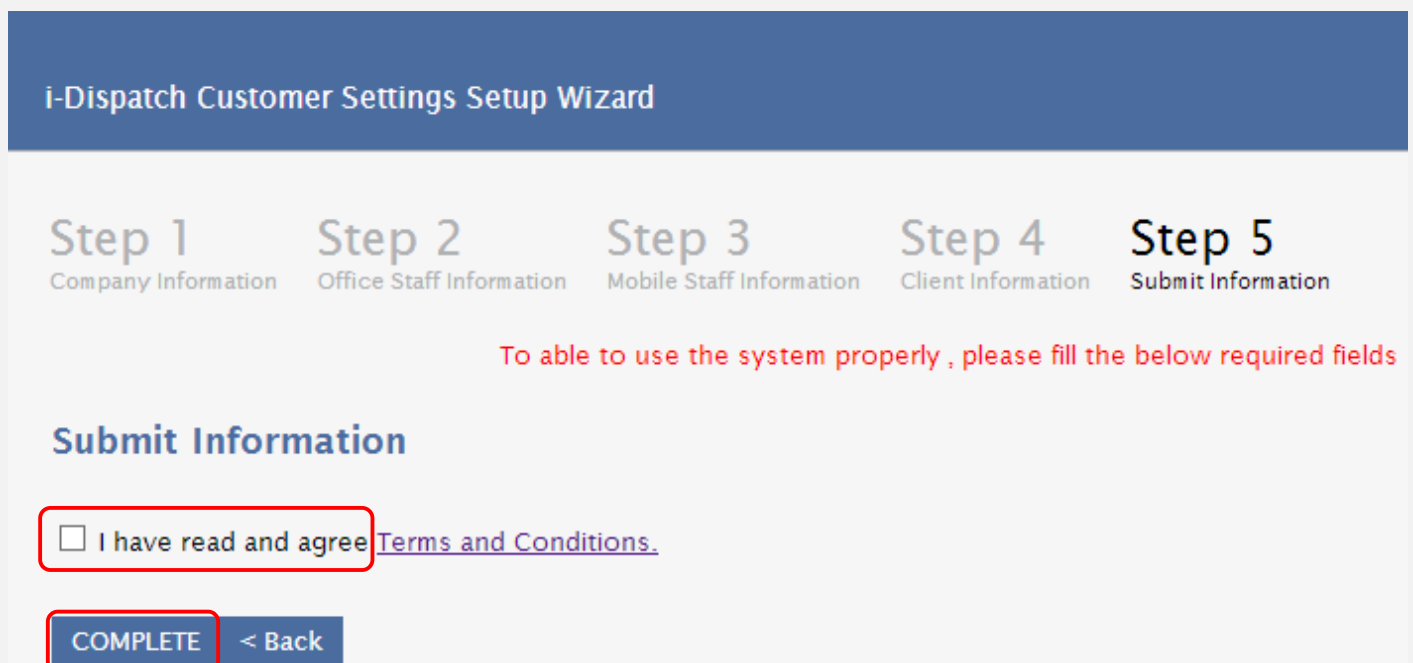
Step 1:-

Go to the website www.i-dispatch.com.au and if you are a first time user, select *Register here*. If you have already registered, enter your & Password and LOGIN

The image shows the 'I-Dispatch Login' form. It has a dark blue header with the title 'I-Dispatch Login'. Below the header, there are two input fields: 'Username:' and 'Password:'. To the right of the 'Password:' field is a link that says 'Forgot your password?'. Below the input fields is a 'LOGIN' button. At the bottom of the form, there is a link that says 'You don't have an account yet? Register here', which is highlighted with a red rectangular box.

Step 2:-

The Setup Wizard will step you through entering your company details, an Office Staff User, a Mobile Staff User and a Client. Read the Terms and Conditions and when satisfied Select the tick box I have read and agree. Select COMPLETE.

The image shows the 'i-Dispatch Customer Settings Setup Wizard'. It has a dark blue header with the title 'i-Dispatch Customer Settings Setup Wizard'. Below the header, there are five steps: 'Step 1 Company Information', 'Step 2 Office Staff Information', 'Step 3 Mobile Staff Information', 'Step 4 Client Information', and 'Step 5 Submit Information'. Below the steps, there is a red text message: 'To able to use the system properly , please fill the below required fields'. Below this message, there is a section titled 'Submit Information'. In this section, there is a checkbox labeled 'I have read and agree' followed by a link 'Terms and Conditions.'. Below the checkbox, there are two buttons: 'COMPLETE' and '< Back'. Both buttons are highlighted with red rectangular boxes.

Upon successful registration with I-Dispatch you will receive a welcome email.

Please file this email as it contains your username and password.

Registration for I-dispatch

✉ no-reply@i-dispatch.com.au [Add to contacts](#)
To trucktech@hotmail.com

Thank you for registering with I-dispatch.

Your username is Birkdale

Your password is BG31

For technical support. Please contact us at support@i-dispatch.com.au

Regards,

The team at www.i-dispatch.com.au

Logging In To Use I-Dispatch At The Office

Go to the website www.i-dispatch.com.au and select Login on the homepage. Enter Your *Username* and *Password* and select *LOGIN*

I-Dispatch Login

Username:

Password: [Forgot your password?](#)

You don't have an account yet? [Register here](#)

The Schedule screen will display. The menu options to navigate are found on the top right hand side of the screen.

[illegible]

Chapter 2: Staff

Staff fall under two different categories, office staff and mobile staff.

Office staff may be set up as *Job Dispatchers*, *Reporters* or *System Administrator*. As Job Dispatchers they will have access only to the job and schedule tabs and their functionalities. As a reporter, in which case they will only have access to the reports page and its functionality or allocated to the *System Administrator* role, they will have access to everything at the web interface end. There is no charge for i-Dispatch for these three categories of user.

Mobile staff may be set up as *Mobile Staff* or *Sub-Contractors*. The difference between the two user profiles is invoicing. When the sub-contractor creates an invoice from his mobile App, his invoice is to the business that he is subcontracted by. This appears in the file Sub-Let at the office end. The business then creates the invoice to the client.

Permissions for the mobile staff and sub-contractor are set by the office staff. Mobile staff and sub-contractors will then be able to access various options on their mobile device depending on what has been selected in their profile

Mobile Permissions

<input type="checkbox"/> Check/Uncheck All	<input checked="" type="checkbox"/> Add Client
<input checked="" type="checkbox"/> Generate Invoice	<input checked="" type="checkbox"/> Add Job
<input checked="" type="checkbox"/> Accept Payment	<input checked="" type="checkbox"/> Reschedule Job
<input checked="" type="checkbox"/> Add Part	<input checked="" type="checkbox"/> Quick Add Client
<input checked="" type="checkbox"/> Add TimeLog	<input checked="" type="checkbox"/> Add Part Type
<input checked="" type="checkbox"/> Edit Profile	<input checked="" type="checkbox"/> View Part
<input checked="" type="checkbox"/> Change Staff Status	<input checked="" type="checkbox"/> Job Document
<input checked="" type="checkbox"/> Start Shift	<input checked="" type="checkbox"/> Forms
<input checked="" type="checkbox"/> End Shift	<input checked="" type="checkbox"/> Hold Job
<input checked="" type="checkbox"/> Start Travel	<input checked="" type="checkbox"/> Reject Job
<input checked="" type="checkbox"/> End Travel	<input type="checkbox"/> Do not use cellular data
<input checked="" type="checkbox"/> Take Photo	<input checked="" type="checkbox"/> Assign job to another staff on mobile
<input checked="" type="checkbox"/> Take Signature	

UPDATE USER DEACTIVE USER

Select Staff to open the Staff Menu screen shown below.

Click *Add Staff* to individually add each staff member or Click *Import Staff* to upload your staff details via a spread sheet. Instructions for importing data can be found in Chapter 17.

STAFF

Staff Add Staff Import Staff Staff Messaging Staff Location Pending Staff

Staff List

Adding Staff Individually

Enter your staff details as shown below.

Username:- The username which this person will use to log into the system

Password:- The password which this person will use to log into the system

First Name & Last Name:- The person's name

Mobile Number:- The person's mobile number (please drop the first zero in the mobile number). Required to send optional SMS messages, such as reminders *For Example 0413 604870 should be entered 413 604870*

Email:- The person's email address. Required to send optional email messages, such as reminders

Phone:- The office or landline phone number

Hourly Rate:- This can be either the persons salary hourly rate OR the persons charge out hourly rate.

Overtime Rate:- This can be either the persons salary overtime rate OR the persons charge out overtime rate.

Staff Role:- The Staff can be a Admin (Office Staff, Job Dispatcher or Reporter) or Workers in the field using Smart Phone Apps (Mobile Staff or Subcontractors).

Staff Skills & Qualifications

In the staff file you may enter skills or qualifications that the employee has accreditation for. A Certificate might be a Driver's License, a First Aid Certificate, Plumbing qualification where as a skill may be a desirable attribute to match the worker to a job, for example the ability to speak a second language.

- You may either select a certification from the drop down box, or type in a new item
- Enter an expiry date and select ADD
- You will then see a list of the staff member's skills and qualifications appear on the right.

The screenshot shows a web form for adding staff skills and qualifications. The form is divided into three main sections: 'Mobile Permissions', 'SKILL', and 'CERTIFICATION'. The 'SKILL' section is highlighted with a red rectangular box. Inside this box, there is a dropdown menu with 'DRIVER LICENSE' selected. To the right of the dropdown is an 'ADD NEW' button. Further right is an 'EXPIRY DATE' field containing the date '30/06/2025'. To the right of the date field are two buttons: 'ADD >>' and 'REMOVE <<'. Below these elements, a list of skills is displayed, showing 'DRIVER LICENSE-30/06/2025' as an added item. The 'CERTIFICATION' section below it is currently empty.

Mobile Permissions:- Tick the functions you would like the mobile user to access on their mobile device. Think carefully about these options before selecting.

Role	Mobile Staff	
Username	Luca	
Password	Leave blank to keep existing password	
Confirm Password	Leave blank to keep existing password	
Firstname	Luca	
Lastname	Darling	
Mobile	Australia (+61)	0427143422
Email	ldarling@hotmail.com	
Phone	03 63319402	
Time zone	(UTC+10:00) Canberra, Melbourne, Sydney	
Hourly rate - \$	10	- Tax Rate % 0 <small>⚠ Applies only to subcontractor staff</small>
Overtime rate - \$	15	- Tax Rate % 0 <small>⚠ Applies only to subcontractor staff</small>
Charge out rate - \$	20	- Tax Rate % 0
Charge out overtime - \$	25	- Tax Rate % 0
Status	Available	Select from date Select to date <small>⚠ Please declare dates if you DO NOT select "Available"</small>
Skills	Carpenter Driver Electrician Mechanic	OR A NEW: <input type="text"/>
Certifications	Boat License Client Site Drivers License First Aid Certificate	OR A NEW: <input type="text"/>
Mobile Permissions	<input checked="" type="checkbox"/> Generate Invoice <input checked="" type="checkbox"/> Accept Payment <input type="checkbox"/> Add Part <input type="checkbox"/> Add TimeLog <input checked="" type="checkbox"/> Edit Profile <input checked="" type="checkbox"/> Change Staff Status <input type="checkbox"/> Start Shift <input type="checkbox"/> End Shift <input type="checkbox"/> Start Travel <input type="checkbox"/> End Travel <input checked="" type="checkbox"/> Take Photo <input checked="" type="checkbox"/> Take Signature <input checked="" type="checkbox"/> Add Client <input checked="" type="checkbox"/> Add Job <input checked="" type="checkbox"/> Reschedule Job <input checked="" type="checkbox"/> Quick Add Client <input checked="" type="checkbox"/> Add Part Type <input checked="" type="checkbox"/> View Part	
<input type="button" value="UPDATE USER"/> <input type="button" value="DEACTIVE USER"/>		

Import Staff

Staff	Add Staff	Import Staff	Staff Messaging	Staff Location
-------	-----------	--------------	-----------------	----------------

Import Staff

⚠ Attention :
I-Dispatch.com.au subscription is AUD \$0.50 per user per day payable at the end of each month. New staff entered will appear under the Pending Staff tab and cannot be allocated jobs until subscriptions are paid.

Staff Type

⚠ Attention : Please download the excel file and modify it and upload it through the system

Download - Upload Excel File

Select Modified Excel File No file chosen

Staff need to be imported in batches, according to their staff type. For example System Administrator, Mobile Staff, Subcontractor, Job Dispatcher or Reporter. It is easiest to separate each staff type onto their own spread sheet.

Select the *staff type* and ensure that the file is in an excel format.

Choose *File*. This will open a browser window where you can locate the file. Click on the file to highlight and select Open

Download - Upload Excel File

Select Modified Excel File

[Choose File](#) No file chosen

[Download excel sample](#)

[UPLOAD SELECTED FILE](#)

[SUBMIT EXCEL FILE](#)

StaffChargeOutRate	StaffChargeOverRate	StaffEmail	DO NOT IMPORT	StaffFirstName	StaffHourlyRate	StaffLastName
Charge Out Rate	Charge Over Rate	Email	F13	Firstname	Hourly Rate	Lastname
20	30	eric@eric.com.au		Eric	10	Erico
25	35	charlie@charlie.com.au		Charlie	150	Charlieo
25	35	ada@char.com.au		Adam	50	Char

Select *Upload Selected File* and the mapping grid will appear.

Select the appropriate column heading to match the data in the column. For example select Staff First Name, in the column of data containing the employee's first name. IF there is no header to match the data, then select DO NOT IMPORT.

Ensure that you have mapped all the columns – if you take your mouse to the bottom of the spread sheet there is a scroll bar, which will take allow you to see any further columns on the right, if there are any.

Once all the fields are mapped, select the *Submit Excel File*. Move your mouse off the submit Excel File button. If you get a message asking if you would like to continue select OK

A success Message in Green will appear, indicating how many records have been inserted. Change the Staff type to the next grouping to import, and repeat the process.

Staff Availability Status

The office administrator and Job Dispatcher may manage a mobile Staff's status by selecting View/Edit in the staff member profile.

User Name	Firstname	Lastname	Role	Status	View/Edit	Send Message	Send SMS
charlie	Charlie	Charlieo	Office Staff	Available	View/Edit		
Dorothy	Dorothy	Dix	Mobile Staff	Available	View/Edit	SEND MESSAGE	SEND SMS
Fifi	Fiona	Bardh	Subcontractor(Mobile Staff)	Available	View/Edit	SEND MESSAGE	SEND SMS

Selecting the *Status*, the *To* and *From* Dates and *UPDATE USER*.

Status	<div>On Sick Leave</div>	16-10-201:	16-10-201:	⚠ Please declare dates if you DO NOT select "Available"
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User Name	Firstname	Lastname	Role	Status	View/Edit	Send Message	Send SMS
charlie	Charlie	Charlieo	Office Staff	Available	View/Edit		
Dorothy	Dorothy	Dix	Mobile Staff	On Sick Leave (From:16/10/2013 00:00 - To: 16/10/2013 00:00)	View/Edit	<input type="button" value="SEND MESSAGE"/>	<input type="button" value="SEND SMS"/>
Fifi	Fiona	Bardh	Subcontractor(Mobile Staff)	Available	View/Edit	<input type="button" value="SEND MESSAGE"/>	<input type="button" value="SEND SMS"/>

Mobile device users can also update their availability. (Please refer to the Smart Phone Section of this manual Chapter 40)

Viewing & Editing Staff Details

Click on the Staff Tab in the top menu bar.

Staff	Add Staff	Import Staff	Staff Messaging	Staff Location	Pending Staff				
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Staff List

Show In Active Staff List									
User Name	Firstname	Lastname	Role	Status	View/Edit	Send Message	Send SMS	Last Location	
charlie	Charlie	Charlieo	Office Staff	Available	View/Edit				
Dorothy	Dorothy	Dix	Mobile Staff	Available	View/Edit	<input type="button" value="SEND MESSAGE"/>	<input type="button" value="SEND SMS"/>		Show
Fifi	Fiona	Bardh	Subcontractor(Mobile Staff)	Available	View/Edit	<input type="button" value="SEND MESSAGE"/>	<input type="button" value="SEND SMS"/>		Show
Jennifer	Jen	Holy	Reporter	Available	View/Edit				
Jono	Giovanni	During	Job Dispatcher	Available	View/Edit				

Click *View/Edit* and the following screen will be displayed

Role	Mobile Staff
Username	Luca
Password	Leave blank to keep existing password
Confirm Password	Leave blank to keep existing password
Firstname	Luca
Lastname	Darling
Mobile	Australia (+61) 0427143422
Email	ldarling@hotmail.com
Phone	05 63319402
Time zone	(UTC+10:00) Canberra, Melbourne, Sydney
Hourly rate - \$	10 - Tax Rate % 0 <small>⚠ Applies only to subcontractor staff</small>
Overtime rate - \$	15 - Tax Rate % 0 <small>⚠ Applies only to subcontractor staff</small>
Charge out rate - \$	20 - Tax Rate % 0
Charge out overtime - \$	25 - Tax Rate % 0
Status	Available <small>Select from date Select to date ⚠ Please declare dates if you DO NOT select "Available"</small>
Skills	<div> Carpenter Driver Electrician Mechanic </div> OR A NEW:
Certifications	<div> Boat License Client Site Drivers License First Aid Certificate </div> OR A NEW:
Mobile Permissions	<div> <input checked="" type="checkbox"/> Generate Invoice <input checked="" type="checkbox"/> Accept Payment <input type="checkbox"/> Add Part <input type="checkbox"/> Add TimeLog <input checked="" type="checkbox"/> Edit Profile <input checked="" type="checkbox"/> Change Staff Status <input type="checkbox"/> Start Shift <input type="checkbox"/> End Shift <input type="checkbox"/> Start Travel </div> <div> <input type="checkbox"/> End Travel <input checked="" type="checkbox"/> Take Photo <input checked="" type="checkbox"/> Take Signature <input checked="" type="checkbox"/> Add Client <input checked="" type="checkbox"/> Add Job <input checked="" type="checkbox"/> Reschedule Job <input checked="" type="checkbox"/> Quick Add Client <input checked="" type="checkbox"/> Add Part Type <input checked="" type="checkbox"/> View Part </div>
<input type="button" value="UPDATE USER"/> <input type="button" value="DEACTIVATE USER"/>	

Details may be changed and then *UPDATE USER* selected, or the user may be deactivated, by selected *DEACTIVATE USER*

Sending a Message to Field Staff Mobile Device

Click on Staff in the top menu bar. Click on Send Message. This message will appear under the messages icon of the mobile user. Messages sent are usually of a generic nature, where notes sent are specific to a job and will remain within the job file.

Staff

Add Staff

Import Staff

Staff Messaging

Staff Location

Pending Staff

Staff List

Show In Active Staff List

User Name	Firstname	Lastname	Role	Status	View/Edit	Send Message	Send SMS	Last Location
charlie	Charlie	Charlieo	Office Staff	Available	View/Edit	<div>SEND MESSAGE</div>	<div>SEND SMS</div>	
Dorothy	Dorothy	Dix	Mobile Staff	Available	View/Edit	<div>SEND MESSAGE</div>	<div>SEND SMS</div>	Show
Fifi	Fiona	Bardh	Subcontractor(Mobile Staff)	Available	View/Edit	<div>SEND MESSAGE</div>	<div>SEND SMS</div>	Show
Jennifer	Jen	Holy	Reporter	Available	View/Edit			
Jono	Giovanni	During	Job Dispatcher	Available	View/Edit			

Type your message and Send

This message will be sent to the Gerry Gardner's Smart Phone App. (Please refer to the Smart Phone Section of this manual)

A transcript of messages sent can be seen by going to the *Staff Messaging* Tab and selecting the parameters required and *SHOW CHAT HISTORY*

Staff	Add Staff	Import Staff	Staff Messaging	Staff Location	Pending Staff
-------	-----------	--------------	-----------------	----------------	---------------

Messaging

Office - From : Philippa Durante

Staff - To : Luca Darling

SHOW CHAT HISTORY

Messaging History

Philippa Durante said :
sending this message to test the Android

Sending an SMS to Field Staff Mobile Device

To send an SMS to the mobile staff member's phone from i-Dispatch, is an alternative to sending a message to i-Dispatch or sending notes. From the employee list select *SEND SMS* to activate this. SMS credits may be purchased via Company Details and SMS Credit.

Staff	Add Staff	Import Staff	Staff Messaging	Staff Location	Pending Staff
-------	-----------	--------------	-----------------	----------------	---------------

Staff List

Show In Active Staff List								
User Name	Firstname	Lastname	Role	Status	View/Edit	Send Message	Send SMS	Last Location
charlie	Charlie	Charlieo	Office Staff	Available	View/Edit			
Dorothy	Dorothy	Dix	Mobile Staff	Available	View/Edit	<input type="button" value="SEND MESSAGE"/>	<input type="button" value="SEND SMS"/>	Show
Fifi	Fiona	Bardh	Subcontractor(Mobile Staff)	Available	View/Edit	<input type="button" value="SEND MESSAGE"/>	<input type="button" value="SEND SMS"/>	Show
Jennifer	Jen	Holy	Reporter	Available	View/Edit			
Jono	Giovanni	During	Job Dispatcher	Available	View/Edit			

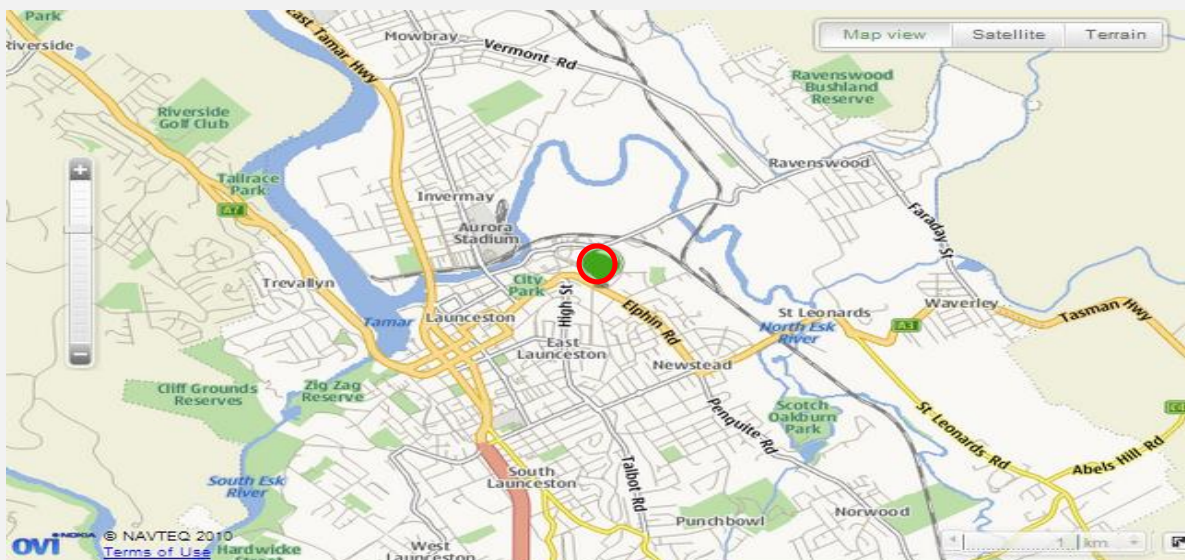
Location of Field Staff

Click on Staff in the top menu bar. Click on Show under the header Last Location. It will pick up the location of the employee when the employee last changed a job. This might be the addition of a note, the change of a status or the addition of a signature for example.

Staff	Add Staff	Import Staff	Staff Messaging	Staff Location	Pending Staff
-------	-----------	--------------	-----------------	----------------	---------------

Staff List

Show In Active Staff List								
User Name	Firstname	Lastname	Role	Status	View/Edit	Send Message	Send SMS	Last Location
charlie	Charlie	Charlieo	Office Staff	Available	View/Edit			
Dorothy	Dorothy	Dix	Mobile Staff	Available	View/Edit	<input type="button" value="SEND MESSAGE"/>	<input type="button" value="SEND SMS"/>	Show
Fifi	Fiona	Bardh	Subcontractor(Mobile Staff)	Available	View/Edit	<input type="button" value="SEND MESSAGE"/>	<input type="button" value="SEND SMS"/>	Show
Jennifer	Jen	Holy	Reporter	Available	View/Edit			
Jono	Giovanni	During	Job Dispatcher	Available	View/Edit			



To see the location of an employee, on a particular date or all staff, select the *Staff Location* tab and enter in your required parameters.

Staff

Add Staff

Import Staff

Staff Messaging

Staff Location

Pending Staff

Staff Location

Staff: Dorothy Dix | From Date: 15-10-2015 | To Date: 15-10-2015

SHOW SELECTED STAFF LOCATION

SHOW ALL STAFF LOCATION

Pending Staff

When entering new mobile staff they will appear under the *Pending staff* tab until payment has been received. Jobs cannot be assigned to staff while they are in Pending Staff

i-Dispatch

STAFF

Staff

Add Staff

Import Staff

Staff Messaging

Staff Location

Pending Staff

Staff List

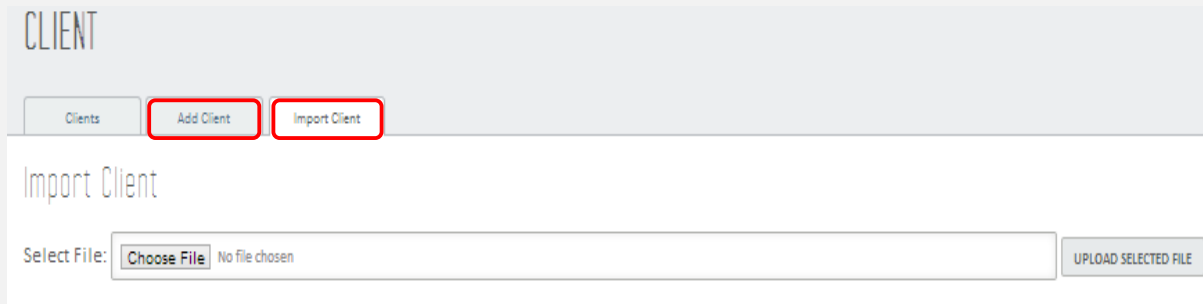
Show In Active Staff List

User Name	Firstname	Lastname	Role	Status	View/Edit
1100	1100	Dorothy	Mobile Staff	Available	View/Edit

Chapter 3: Clients

Click on the Clients Menu The following screen will display

Client Details may be added manually and individually by clicking *Add Client*, or may be uploaded from a spread sheet by clicking *Import Client*.



The screenshot shows a web interface for managing clients. At the top, there's a header labeled 'CLIENT'. Below it, a navigation bar contains three buttons: 'Clients', 'Add Client', and 'Import Client'. The 'Add Client' and 'Import Client' buttons are highlighted with red rectangular boxes. Below the navigation bar, the 'Import Client' section is active, displaying the title 'Import Client'. Underneath, there's a file selection area with the text 'Select File:' followed by a button labeled 'Choose File' and the text 'No file chosen'. To the right of this area is a button labeled 'UPLOAD SELECTED FILE'.

Add Clients Individually

Enter your client's details as shown below. Clients may be companies or individuals.

***Client Name:-** The name the company is known by. This needs to be a unique entry from all other clients

***Code:-** A unique alpha and or numeric code given to this client

***First Name:-** The given name of the contact at the clients

Last Name:- The last name of the contact at the clients

***Company:-** The companies official entity name, required for invoicing

ABN (or Tax Number):- Clients ABN, required for invoicing

Position:- the position on the client contact

Email:- the email address of the client contact

Phone:- the office phone number of the client contact

Mobile – a mobile contact number

Fax:- the fax number of the client contact

***Address #1:-**the physical address of the client

Address #2:-the physical address of the client if it requires additional space

Suburb:- the suburb of the physical address of the client

State:- the state of the physical address of the client

Country:- the country of the physical address of the client

Postcode:-the postcode of the physical address of the client

Mailing Address#1:- the mailing address of the client

Mailing Address#2:- the mailing address of the client if it requires additional space

Mailing Suburb:- the mailing suburb of the client

Mailing State:-the mailing state of the client

Mailing Country:- the mailing country of the client

Mailing Postcode:- the mailing postcode of the client

Notes: - Type in any notes relating to the client.

PLEASE NOTE: items above proceeded with an asterisk * are mandatory fields.

Add Client	
Client Name	McDonalds
Code	McD's
First Name	Ronald
Last Name	McDonald
Company	McDonalds
Business Type	Pizzeria
ABN Number(or TAX Number)	000000000
Position	Mascot
Email	Ronald@mcdonald.com.au
Phone	235689784512
Mobile	Australia (+61) 2356891245
Fax	
Address #1	Cnr Main Road and High Street
Address #2	
Suburb	Melbourne
State	VIC
Country	Australia
PostCode	3000
Mailing Address #1	Velvet Avenue
Mailing Address #2	
Mailing Suburb	
Mailing State	Vic
Mailing Country	
Mailing PostCode	
Notes	

Import Client

Select Upload Selected File. A grid will then appear, with the details from the spread sheet you are importing. The headers (column names) on your spread sheet are in the white font, on the darker blue background. From the drop down menu, select the type of data in the column, so that it will import into the correct field. For example in your spread sheet header for the first column is Client First Name, then select Client first Name from the drop down menu. Ensure that you have mapped all the columns – if you take your mouse to the bottom of the spread sheet there is a scroll bar, which will take allow you to see any further columns on the right, if there are any.

Import Client

Select File: No file chosen

ClientFirstName	ClientABN	ClientAddress1	ClientBusinessType	ClientCode	DO NOT IMPORT	ClientEmail
Client FirstName	ClientABN	ClientAddress	ClientBusinessType	ClientCode	ClientCountry	ClientEmail

Once all fields are mapped, so that the name on the spread sheet header matches the mapping name, OR DO NOT IMPORT is selected for columns with no data or no header match. Then Select Submit Excel File. Move your mouse off the Submit Excel File button. If you get a message asking if you would like to continue select OK. A Success Message in Green will appear, indicating how many records have been inserted. If there is a large number of records to be imported, you may need to refresh the screen for them to appear.

Once clients are added, they will be displayed under the Client Menu as follows.

Client List
Robuck Security
Roche
Ronald McDonald House Canberra
Royal Hotel Queanbeyan
Royal Mail Hotel Braidwood
Royle
Rustics Haircutters
Rydges ANU Function
S
S.M.E.C.
Saddleworld
Salafia
Salafia & Co.
Schenker Australia Pty Limited
Schoos Studio
Sculpture Exhibition Yass
SCUT
Secom Security
Secom Technical Services Pty Ltd
Securecorp (Securemonitoring PL)

Sub Clients

Where a business will do third party jobs. For example a gardening business may have a client who is a real estate agent. The gardening business is employed to tidy gardens at residents managed by the real estate agent. These residents are third parties or sub clients.

Click on the client who has appointed you to work at a third party location. Select Add Sub Client. The entry screen for the sub client contains all the same fields as the client. Sub clients cannot be imported

Client List -->

EDIT CLIENT - ABC Real Estate

Edit Client

Client Name: ABC Real Estate

Code: ABCRE

First Name: Penny

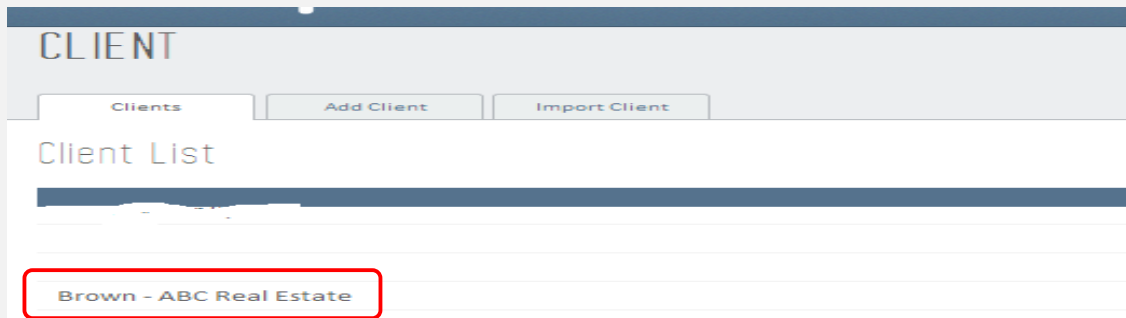
Last Name: Money

Company: ABC Real Estate Agency

Business Type: Property Management

ABN Number (or TAX Number): nnnnnnnn

Sub clients can then be seen in client lists as the name of the sub client then a dash and then the client's name. This allows them to be easily identified as a sub client.



Quick Add Clients

Mobile users have a permissions option to Quick Add a client. This can be used when they are out in the field, and cannot get the complete client details to add them into the database. When the mobile user has "Quick Add" the client, the client will appear in the client list.

Please note: A job cannot be saved to this client until their full contact details have been entered.

Client Login

You now have the option of creating a client login from the client file. If you tick this option the client will be emailed a user name and password to access i-Dispatch.

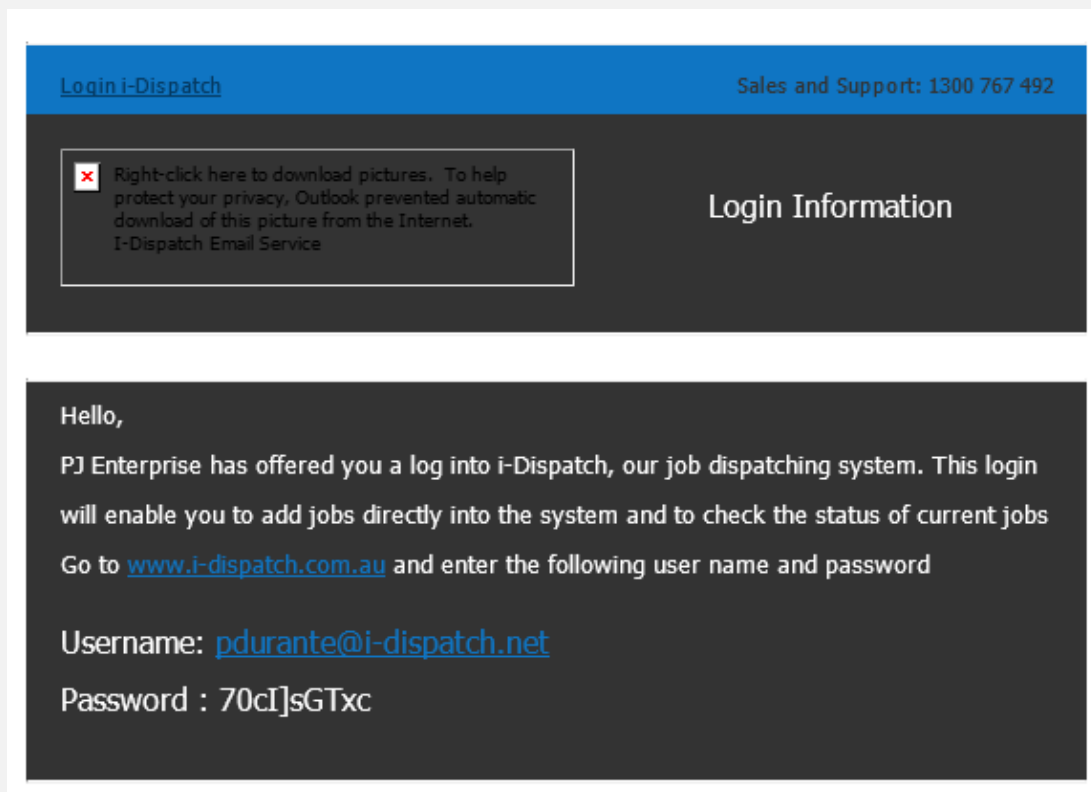
NOTE: In order for this to work, you must have a valid email address set up in the client file.

When the client logs into i-Dispatch, they will be able to add a new job into the system. This job will be unassigned and you will receive an alert advising you that they have just entered a new job in the system and to assign it. The client will also be able to see any progress of any existing jobs in the system.

1. In clients select the client you would like to access the system and tick to generate their login credentials

A screenshot of a client details form. The form has various input fields for client information: Fax, Address #1 (32 Northbourne Ave), Address #2, Suburb, State (ACT), Country, PostCode (2601), Mailing Address #1, Mailing Address #2, Mailing Suburb, Mailing State, Mailing Country, Mailing PostCode, Login i-Dispatch, and Notes. At the bottom, there is a checkbox labeled 'GENERATE LOGIN CREDENTIAL' which is checked and highlighted with a red box. To the right of this checkbox is a text input field labeled 'What is the P'. A blue information box on the right side of the form contains the following text: 'This function when selected, will send out an i-Dispatch login option to your client. The client will be able to enter their own jobs into i-Dispatch and review the progress of their existing jobs. You must have a valid email address set up in the client file to use this function.'

2. The client will receive an email advising them a login has been set up for them with their login details.



3. When the client logs into i-Dispatch they will only have access to add a new job or view existing jobs. To add a new job it will automatically pick up the client – their address and their contact details. The client will
- add the Job Title [what is to be done],
 - a Job Customer Ref [a purchase order number or similar]
 - their preferred date and time for the job to be done,
 - change the priority if required
 - any comments regarding the job.
 - ADD JOB

JUB

Jobs Add Job

Add New Job

Job Information

Contact Person: Philippa

Contact No: 1300 767 492

Contact No 2: 0407858715

Job Title: Repair fence

Job Customer Ref: PO 1245

Job Start Date: 28-08-2015 13:00

Duration hour(s): 1.00

Address 1: 32 Northbourne Ave

Address 2:

Suburb:

State: ACT

PostCode: 2601

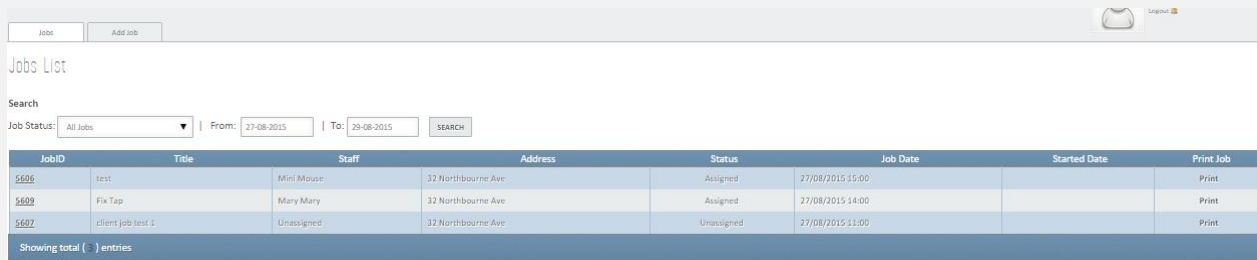
Country:

Priority:

Comment: Posts on the fence are loose. Please secure any posts which are weak, and paint any changes to match existing

ADD JOB

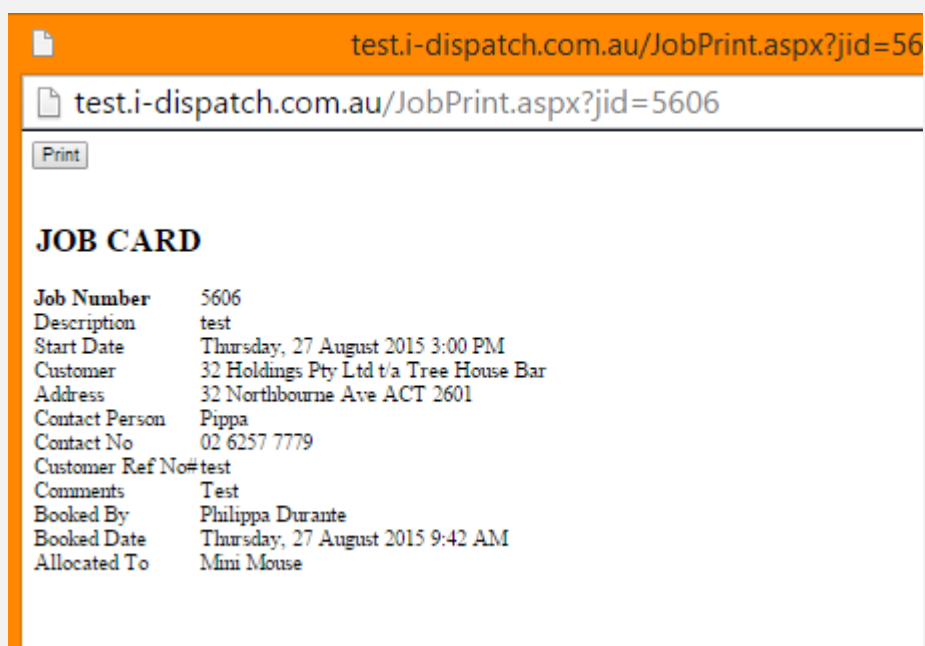
4. To view existing jobs the user will select the Jobs tab and may search by any status and date range. Only that clients jobs will be listed – showing the job number the staff member allocated the status the date and time the job has been booked and the option to print out the job details.



The screenshot shows a web application interface for viewing jobs. At the top, there are tabs for 'Jobs' and 'Add Job', and a 'Logout' button. Below the tabs is a 'Jobs List' section. A search bar is present with a dropdown for 'Job Status' (set to 'All Jobs'), input fields for 'From' (27-08-2015) and 'To' (29-08-2015), and a 'SEARCH' button. Below the search bar is a table with columns: JobID, Title, Staff, Address, Status, Job Date, Started Date, and Print Job. The table contains three rows of data. At the bottom, it says 'Showing total (3) entries'.

JobID	Title	Staff	Address	Status	Job Date	Started Date	Print Job
5606	test	Mini Mouse	32 Northbourne Ave	Assigned	27/08/2015 15:00		Print
5609	Fix Tap	Mary Mary	32 Northbourne Ave	Assigned	27/08/2015 14:00		Print
5607	client job test 1	Unassigned	32 Northbourne Ave	Unassigned	27/08/2015 11:00		Print

5. Job Detail printout will enable the user to have a printed copy of the job they have entered into the system.



The screenshot shows a web browser window with the address bar displaying 'test.i-dispatch.com.au/JobPrint.aspx?jid=5606'. Below the address bar is a 'Print' button. The main content area is titled 'JOB CARD' and contains a list of job details.

JOB CARD

Job Number: 5606
Description: test
Start Date: Thursday, 27 August 2015 3:00 PM
Customer: 32 Holdings Pty Ltd t/a Tree House Bar
Address: 32 Northbourne Ave ACT 2601
Contact Person: Pippa
Contact No: 02 6257 7779
Customer Ref No: test
Comments: Test
Booked By: Philippa Durante
Booked Date: Thursday, 27 August 2015 9:42 AM
Allocated To: Mini Mouse

Chapter 4: Company Details

Editing Company Details

Company details are entered at the time of setting up the company. If these details require editing at any time select Company Details. Make the required changes and UPDATE COMPANY DETAILS

Company Info

Parts

WorkGroup

Staff Status

Sms Credit

Subscription

Signature Message

Job Documents

Forms

Company Label

Mobile Staff Tracking

Software Integration

Company Details

Company Name

PJ Enterprise

Email

pdurante@i-dispatch.net

Billing email

pjldurante@gmail.com

Phone

03 63319402

Mobile

Australia (+61)

0407 858 715

ABN Number(or TAX Number)

123456789

Address#1

Caladh

Address#2

53 Elphin Road

Suburb

Launceston

PostCode

7250

State

Tas

Country

Australia

Mailing Address #1

P O Box 30

Mailing Address #2

Mailing Suburb

Newstead

Mailing PostCode

7250

Mailing State

Tas

Mailing Country

Company Logo

Choose File

No file chosen

View Logo

Company Conditions : (Apply for Invoice)

test

UPDATE COMPANY DETAILS

Parts

Parts or inventory items may be added manually and individually by clicking *ADD PART*, or may be uploaded from a spread sheet by clicking *UPLOAD EXCEL FILE*. Parts may also be used for flat rate charges to clients for example call out fees.

ADD PART

Upload Part

Choose File

No file chosen

UPLOAD EXCEL FILE

Download excel sample

Part List

Part Name	Part Code	Purchase Price	Sale Price	Description	Delete
-----------	-----------	----------------	------------	-------------	--------

Add Parts Individually – Enter your Parts as shown below. Fill in the fields and select *ADD PART*.

Part Name:- the country of the physical address of the client

Part Code:-the postcode of the physical address of the client

Purchase Price:- the mailing address of the client

Sale Price:- the mailing address of the client if it requires additional space

Description:- the mailing suburb of the client

Add Part

Part Name	Tap Washer 123		
Part Code	tWrEEce1234		
Purchase Price	2.00		
Sale Price	5.00	Tax Rate %	10
Description	Tap Washer to suit all standard taps.		

ADD PART

Import Parts

Ensure that your saved Parts file is in an Excel format. Choose File to open a browser window. Navigate to the saved parts file. Click on the file to highlight and select Open. Select, *Upload Excel file* and the data mapping grid will appear below. Map the fields of data to the header options for example, the column of data containing the purchase price, should be linked to the header option Part Purchase Price. If there is a column of data where there is no matching header, select DO NOT IMPORT. When all columns of data have headers assigned, select *Submit Excel File*.

Choose File No file chosen Download excel sample

PartCode	PartDescription	PartName	PartPurchasePrice	PartSalePrice	PartTaxRate
Code	Description	Name	Purchase Price	Sale Price	Tax Rate
CarWash	Car Wash basic	CarWash	5	20	1
CarVac	Car Vacuum	Car Vacuum	10	25	1
CarWax	Car Waxing Exterior	Car Wax	15	40	1
Mow	Mowing Lawn hourly Rate	Mowing Lawns	30	60	1
PaintEx	Painting Exterior Hourly Rate	PaintExterior	35	70	1
PaintInt	Interior Painting Hourly Rate	Painting Interior	25	50	1
PoolMaint	Swimming pool maintenance hourly rate	Pool Maintenance	20	20	1

Deactivate Parts. Click on the work active and a message will appear on the screen confirming your choice, select OK. Once the part has been made inactive, it will no longer display on the parts list under the JOB ID and parts, nor will it be available on the parts list on Android or Apple apps.

Broadcast Group

Staff may be added into teams or work groups, therefore allowing job dispatch to a single mobile worker or a team of staff.

For example:- A project requires an Electrician, Plumber and Carpenter. You can allocate staff with those skills to a group and then allocate the broadcast to a Job. Or a new "Southern Region" team is established to undertake a project.

Company Info

Parts

Broadcast Group

Staff Status

Sms Credit

Subscription

Signa

Add/Edit Broadcast Group

Group Name

Staff

Lucas Darling

Annie Spencer

Daffy Duck

Mickey Mouse

ADD NEW GROUP

Broadcast Group List

Group Name
Engineers

Staff Status

Click on Company Profile and Staff Status to add any staff availability status that applies to your business, which is not already in the list. Type the name in the *Status Name* field and then *ADD STATUS*

Company Info

Parts

WorkGroup

Staff Status

Sms Credit

Membership

Add/Edit Staff Status

Status Name

ADD STATUS

Staff Status List

Status Name	Delete
Available	Delete
On Annual Leave	Delete
On Sick Leave	Delete
On Leave- Other	Delete
RDO	Delete
ADO	Delete

SMS Credit

If you are electing to send SMS messages to your mobile staff rather than use the messaging or notes features within i-Dispatch. SMS credits may be purchased in bulk packages of 100, 500, 1000 or 5000 from this screen. When the number of SMS has been selected you will be forwarded to a BPAY screen for payment. The credit history is reflected below this

Company Info

Parts

WorkGroup

Staff Status

Sms Credit

Membership

Buy Sms Credit

Sms Credit Package

Select...
Select...
100 (\$ 15.00)
500 (\$ 75.00)
1000 (\$ 125.00)
5000 (\$ 500.00)

Sms Credit History

Purchased Amount	Available	Date - Time
100	98	Tuesday, 24 September 2013 3:54 PM
2	0	Monday, 2 September 2013 10:29 AM

A tax invoice can be printed at any time from the Download Invoice option

COMPANY DETAILS

Company Info

Parts

WorkGroup

Staff Status

Sms Credit

Membership

Buy Sms Credit

Sms Credit Package

Select...

BUY SMS PACKAGE

Sms Credit History

Purchased Amount	Available	Date - Time	Invoice
100	98	Wednesday, 6 November 2013 3:50 PM	Download Invoice
100	98	Tuesday, 24 September 2013 3:54 PM	Download Invoice
2	0	Monday, 2 September 2013 10:29 AM	Download Invoice

Showing total (3) entries

Subscription

The Subscription tab allows you to see details of your i-Dispatch subscription renewals due and payment history.

Any renewals due will appear in the first instance of opening the screen. Tick the boxes of those you wish to renew and **PAY NOW**.

COMPANY DETAILS

Company Info

Parts

WorkGroup

Staff Status

Sms Credit

Subscription

Signature Message

Subscription History

SHOW MEMBERSHIP HISTORY INVOICE

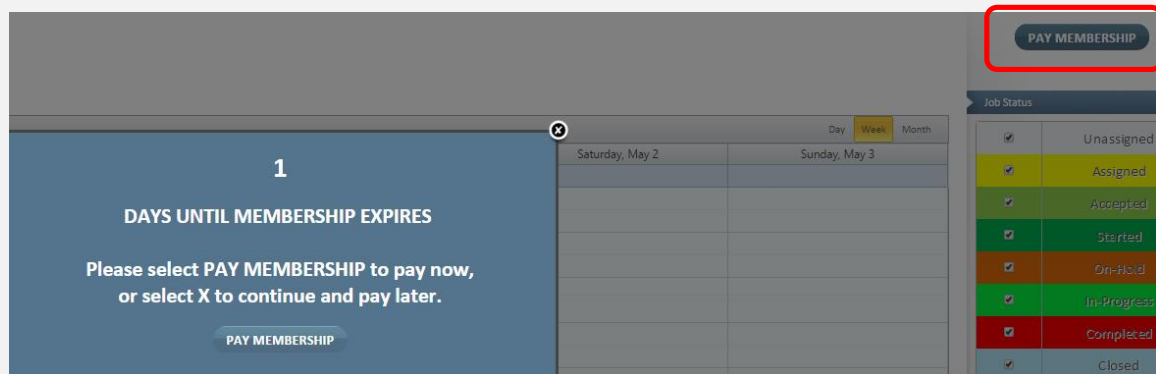
PAY NOW

Pay Now	Username	Name - Surname	Current Expired Date	Next Expired Date	Monthly Fee
<input type="checkbox"/>	QEB	Quentin Bird	Saturday, 30 November 2013 12:00 AM	Tuesday, 31 December 2013 11:00 PM	\$15.50
<input type="checkbox"/>	Luca	Lucas Darling	Saturday, 30 November 2013 12:00 AM	Tuesday, 31 December 2013 11:00 PM	\$15.50
<input type="checkbox"/>	Annie	Annie Spencer	Saturday, 30 November 2013 12:00 AM	Tuesday, 31 December 2013 11:00 PM	\$15.50

Showing total (3) entries

To review the historical payments made, SHOW MEMBERSHIP HISTORY INVOICE and a screen similar to the SMS credit screen will display and you may download copies of invoices from here.

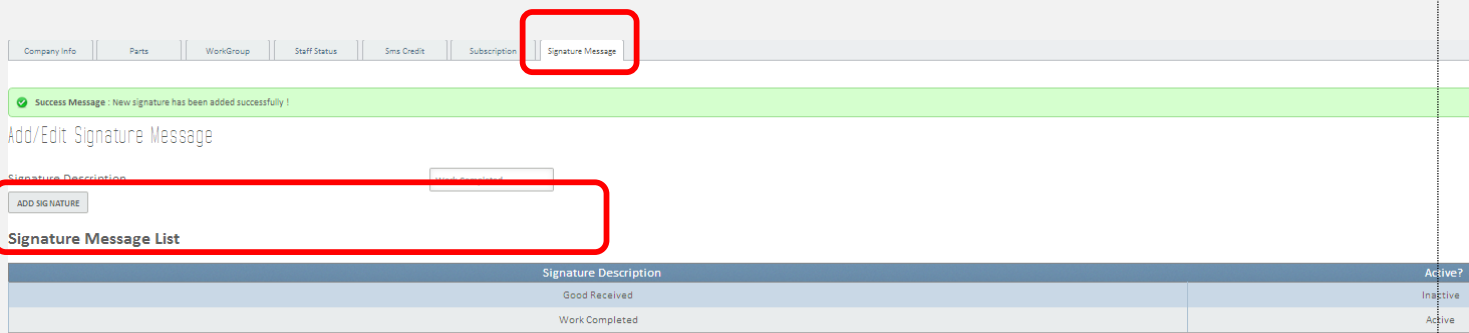
In the lead up to your trial finishing or your subscription falling due, you will receive a **countdown** to the end of the period. This allows the user to easily determine how many days they have left in their trial /subscription. This appears on the job and scheduler screens, on the upper right and side above the messages and notes, and also when you log into the program.



Signature Message

Signature messages allows the company to add a script or words around the signature capture. For example, asking the client to sign that goods have been received in good condition.

- Company Details | Signature Message.
- Type in the message that you would like to appear on the mobile, for the customer to sign their name against.
- select ADD SIGNATURE



Job Documents

Service Reports / Quotes [Company Details | Job Documents] allows the mobile user to produce a quote or service report for a client on site. This report has the option of displaying or masking dollar values and requiring a signature. Company logos may also be added to these documents

Company Info Parts WorkGroup Staff Status Sms Credit Subscription Signature Message **Job Documents**

Add/Edit Job Documents

Doc Type: Select... Title:

Company Logo on the document: Choose File No file chosen

ADD DOC

Job Documents List

Job Doc Title	Prices Shown?	Is Signature Required?	Active?	Logo
Testing Service Report	YES	YES	Active	
Service Report January	NO	YES	Active	View Logo
Service Report	NO	YES	Active	View Logo

- Select the document type of either Service Report or Quote
- In the Title field, type in the title you would like to appear on the top of the report
- Tick boxes to show price or document requires a client signature – if required
- If you would like a company logo to appear on the report, select Choose File and file the logo file via the browser.

Sms Credit Subscription Signature Message **Job Documents**

Service Report Title: Service Report

☐ Show Price

☒ Signature Requires

Choose File logo-mobile.png

- Press ADD DOC

When the document has been processed on the mobile side it will then appear in the job details tab, under job document. Here you can see any job documents produced, if they have a signature, who they were created by and open the document by selecting View, to view it.

Staff - Customer E-Mail - SMS WorkTime Parts Used Image & Signature Job Notes Location - Map Invoice Received Payment **Job Documents**

nts

Doc Title	Created Date	Created By	Signature	Document
Testing Service Report	Tuesday, January 21, 2014 - 11:59	Luca Darling	View	View
Service Report January	Tuesday, January 21, 2014 - 11:57	Luca Darling	View	View
Service Report	Thursday, January 23, 2014 - 11:38	Luca Darling		View

Forms

Many of our clients require staff to complete a checklist at various stages of a job. For example an Occupational Health and Safety checklist before commencing a job.

From **Company Documents | Forms**. Enter the name of your form, tick if you require the staff member to add their signature on completion. Enter the Name of each field and select the type of field the mobile employee requires for their response. Enter as many fields as required and then select Add Forms and fields.

Form Name: site inspection

☒ Signature Requires ?

☒ Is Active ?

Form Fields	Type	Is Active
date	Date	<input checked="" type="checkbox"/>
name	Text	<input checked="" type="checkbox"/>
site is clear of electrical	YES / NO	<input checked="" type="checkbox"/>
site is clear of trip hazard	YES / NO	<input checked="" type="checkbox"/>
fuel reduction is required	YES / NO	<input checked="" type="checkbox"/>
the ground is solid underfoot	YES / NO	<input type="checkbox"/>
	Number	<input type="checkbox"/>

ADD

UPDATE FORM & FIELDS

Forms are then added to the job from **Jobs | Add Job**, select to apply a form to a particular job status.

Company Label

These fields allow for clients with diverse needs to record specific different details regarding their jobs or industries. Clients may enter a name for these fields. Then under the Add Job | Job Additional Fields, these fields will display with the labels given. The data in these fields will display on both the Android and Apple apps.

Add/Edit Company Label

Job Additional Field 1: Pallet type 1

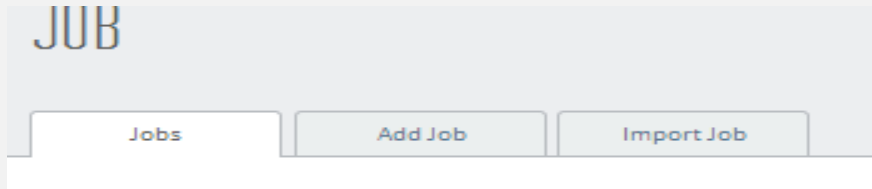
Job Additional Field 2: Pallet type 2

Job Additional Field 3: Pallet type 3

UPDATE

Chapter 5: Jobs

Click on Jobs and the following screen will display. Click *Add Job* to individually add each job or Click *Import Job* to upload your job details via a spread sheet.

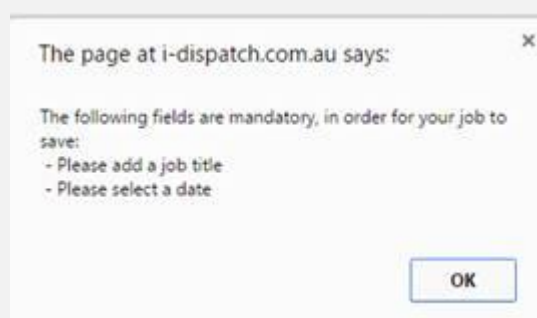


Add Job

The following screen will display. Please add your jobs. See an example below. Mandatory fields are marked with a small *

A screenshot of the 'Add Job' form. The form contains various input fields for job details. Several fields are highlighted with red rectangles to indicate they are mandatory: 'Client' (a dropdown menu showing 'Woolmers #1018'), 'Job Title' (an empty text field), 'Job Start Date' (a date picker showing 'Select date'), 'Address 1' (a text field showing 'Woolmers lane'), and 'Assign to Staff' (a dropdown menu showing a list of staff names including 'Quentin Bird - Available', 'Lucas Darling - Available', and 'Daffy Duck - Available'). Other fields include 'Contact Person', 'Contact No', 'Contact No 2', 'Job Customer Ref', 'Duration hour(s)', 'Address 2', 'Suburb', 'State', 'PostCode', 'Country', 'Priority', 'Status', and 'Comment'.

If one of these fields has not been completed when adding a job, a message will appear advising which of the fields require data.

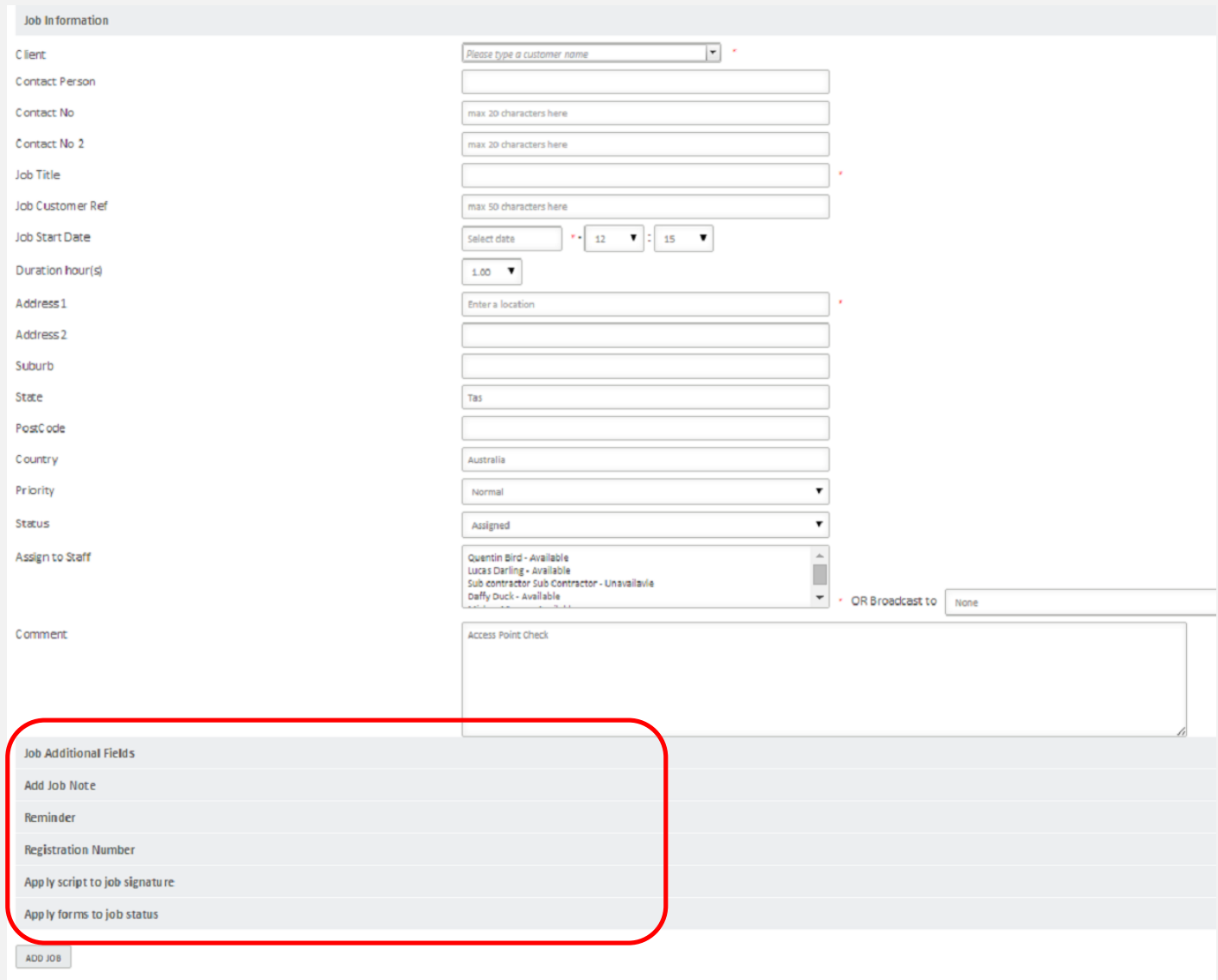


To assign a job to multiple staff, hold the CTRL key down and select the required employees.

When adding a new job, the time defaults to near the current time, so jobs are not inadvertently added to times in the past.



The fields against the other headings for example Job Additional Fields are hidden and only need to be completed if needed.



Company signature is attached to a job, and has scripting, therefore the client will see sign that Goods have been received or sign to confirm work has been completed. [script is added from **Company details | Company Signature**] This option has now been linked to a job status, so the mobile employee will be prompted when they change a job status to get a signature.

Registration Number

Apply script to job signature

Work Completed
Goods Received
Called By

Assign
Started
Completed
On-Hold

ADD => REMOVE <=

Work Completed-Completed

Apply forms to job status

Forms are also applied to a job status. Click on the form, the job status that the mobile user will be prompted to complete the form and select ADD.

Apply forms to job status

OH & S check
site inspection
3rd test

Assign
Started
Completed
On-Hold

ADD => REMOVE <=

OH & S check-Started

Once the form has been completed on the mobile end, this may be viewed, by clicking on the JOB ID on the jobs list and under the company documents tab.

PLEASE NOTE: Once a job is Save is selected a job reference number will be allocated. See Below

Success Message : Job has been assigned !!! - CLICK THE DETAILS

JOBS LIST

Information Message : By default the job list will display jobs based on the job date from 11-09-2015 to 11-09-2015. To change the default, [CLICK HERE](#)

Attention Message :
Job(s): 7941 - 8677 - 14926 - 33707 - 34364 - 37248 - 37598 require(s) rescheduling please!

| Staff: All | Client: All | ☐ Include Sub Clients Jobs | Job Status: All Jobs | From: 11-09-2015 | To: 11-09-2015

JobID	Customer Ref No	Title	Staff	Customer	Address	Status	Job Date	Started Date	Communicate	Print Job
50298	PO 235689	pick up shipping container 24'	Daffy Duck	Airport International Hotel	Boeing Parade Queanbeyan	ASSIGNED	11/09/2015 09:14		Send	Print
23490	Low Maintenance	Quote on rejuvenation	Daffy Duck	The Vines	16 Mildura Street Fyshwick	ASSIGNED	11/09/2015 12:00		Send	Print
23228	Low Maintenance	Quote on rejuvenation	Daffy Duck	The Braddon Club	99 Canberra Avenue Braddon	ASSIGNED	11/09/2015 12:00		Send	Print
5079	SO-152582	QUALITY FOOD WORLD	Unassigned	Woolmers estate	Woolmers lane longford	Unassigned	11/09/2015 15:00		Send	Print

Import Job

Ensure that your saved Jobs file is in an Excel format. Follow the previous instructions to convert the file to excel if required. Choose the file to open a browser window. Navigate to the saved jobs file. Click on the file to highlight and select Open.

Select *Upload Selected File* and the mapping grid will appear. Select the appropriate column heading to match the data in the column. In the columns for staff and client – the mapping occurs against each item. Select from the drop down arrow at the end of each line, which staff member and which client each job belongs to. *Ensure that you have mapped all the columns* – if you take your mouse to the bottom of the spread sheet there is a scroll bar, which will take allow you to see any further columns on the right, if there are any.

Once all the fields are mapped, select the Submit Excel File. Move your mouse off the submit Excel File button. If you get a message asking if you would like to continue select OK. A success Message in Green will appear, indicating how many records have been inserted.

Viewing Jobs list information Office PC

Click on Jobs Menu:- Jobs may be viewed in a table format. By default the jobs displayed will be based on their booking date in ascending order one month in advance and one month in arrears of today's date.

Search

Job ID: | Staff: | Client: ☐ Include Sub Clients Jobs | Job Status: | From: | To:

Action To:

Job	Customer Ref No	Title	Staff	Customer	Address	Status	Job Date	Started Date	Send Note	Print Job	Invoice/Warranty	Sublet Invoice/Warranty	Recur Job	Action
6578	High Maintenance	Fix fence	Daffy Duck	Riverpoint	23 Lonsdale St Braddon	STARTED	29/04/2015 16:30	29/04/2015 10:07	Send	Print			Recur	<input type="checkbox"/>
12295	8956	Fix tap Washer	Lucas Darling	Woolmers estate	55 Benwerrin Cres Norwood	RESCHEDULE REQUIRED	29/04/2015 18:00			Print			Recur	<input type="checkbox"/>
23126	Low Maintenance	Fortnightly Lawn Mowing	Daffy Duck	The Good Guys	Address Unit 3, The Hyperdome House & Home 76 Athlton Drive Tuggeranong	COMPLETED	29/04/2015 14:00	29/04/2015 09:45	Send	Print	External Invoice		Recur	<input type="checkbox"/>
19053	Bins Only	Maintenance Level 3	Annie Spencer	The Vines	16 Mildura Street Fishwick	ASSIGNED	29/04/2015 14:30		Send	Print			Recur	<input type="checkbox"/>
23388	Mid Maintenance	replace windows	Daffy Duck	The Spence Grocer	Shop 1, Glassey Place Spence	COMPLETED	29/04/2015 16:00	29/04/2015 09:53	Send	Print			Recur	<input type="checkbox"/>

Job priorities are clearly visible – Yellow = low priority, Amber = medium priority and Red = urgent.

Job comments are visible by hovering your mouse over the JOB ID number on the job screen. When entering a job, there is a comments field. If comments are entered at any stage during the job, they are easily seen.

JobID	Customer Ref No	Title
41273		Test 2
234		Quote on rejuvenation

Access Point Check

Sorting Jobs:- may be done at a screen level, by selecting the up or down arrow to the right of an item. By selecting the down arrow in a particular column, you will sort all the jobs by highest to lowest values or Z-A alphabetically, based on the data contained in that column. By selectin the up arrow the sort will be the lowest to highest number or A-Z alphabetically. You may also select your own default sort criteria, for each time you open the job screen.

Click on Schedule:- Jobs may also be viewed in a calendar function. Click on the job to open details.

i-Dispatch

SCHEDULE

Dashboard Staff Jobs Schedule Reports Clients Company Details

PHILIPPA DURANTE

Scheduler

EXPORT TO PDF

All Mobile Staff

Monday, April 27

Tuesday, April 28

Wednesday, April 29

Thursday, April 30

Friday, May 1

Saturday, May 2

Sunday, May 3

Job Status

- Unassigned
- Assigned
- Accepted
- Started
- On Hold
- In Progress
- Completed
- Closed
- Rescheduled
- Quay Administrator
- Quay Mobile

UPDATE SCHEDULER

Received Job Notes

Get on site and tidy up...

Received Messages

OK will do

Changing Job Search Defaults

A default list of jobs will appear when you first log into the job page [as noted above] . You may change these defaults by selecting [CLICK HERE](#), selecting your search criteria and Search. Each time you enter the software the job search defaults most suited to your business will appear.

The screenshot shows the 'Jobs List' page. At the top, there are tabs for 'Jobs', 'Add Job', and 'Import Job'. Below the tabs is a blue information message bar that says: 'Information Message : By default the job list will display jobs based on the job date from 01-09-2013 to 30-11-2013. To change the default, [CLICK HERE](#)'. Below the message bar is a search section with the following fields: 'Job ID:' (text input), 'Staff:' (dropdown menu with 'All' selected), 'Client:' (dropdown menu with 'All' selected), 'Job Status:' (dropdown menu with 'All Open Jobs' selected), 'From:' (date input '01-09-2013'), 'To:' (date input '30-11-2013'), and a 'SEARCH' button.

Job Status

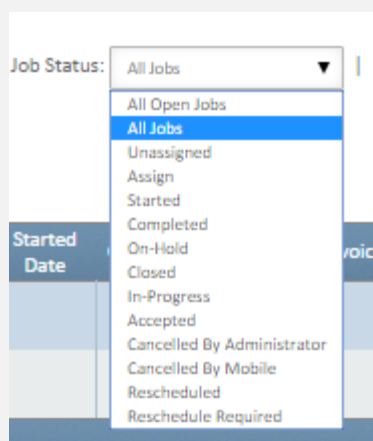
Click on Jobs in the Menu Bar – View Status Column

JobID	Customer Ref No	Title	Staff	Customer	Address	Status	Job Date	Started Date	Send Note	Print Job	Invoice/Warranty	Sublet Invoice/Warranty	Recur Job	Action
6578	High Maintenance	Fix fence	Daffy Duck	Riverpoint	23 Lonsdale St Braddon	STARTED	29/04/2015 10:30	29/04/2015 10:07	Send	Print			Recur	<input type="checkbox"/>
12295	8956	Fix tap Washer	Lucas Darling	Woolmers estate	55 Benwerrin Cres Norwood	RESCHEDULE REQUIRED	29/04/2015 10:00			Print			Recur	<input type="checkbox"/>
23126	Low Maintenance	Fortnightly Lawn Mowing	Daffy Duck	The Good Guys	Address Unit 3, The Hyperdome House & Home 76 Athillon Drive Tuggeranong	COMPLETED	29/04/2015 10:00	29/04/2015 09:45	Send	Print	External Invoice		Recur	<input type="checkbox"/>
19053	Bins Only	Maintenance Level 3	Annie Spencer	The Vines	16 Mildura Street Fyshwick	ASSIGNED	29/04/2015 10:30		Send	Print			Recur	<input type="checkbox"/>
23388	Mid Maintenance	replace windows	Daffy Duck	The Spence Grocer	Shop 1, Glassey Place Spence	COMPLETED	29/04/2015 10:00	29/04/2015 09:53	Send	Print			Recur	<input type="checkbox"/>

Job Status is updated by the field worker Smart Phone Application. (Please refer to the Smart Phone Section of this manual) or can be updated by Office PC

The status *Unassigned* can be used for clients who are importing jobs from spread sheets or other software, sometimes the jobs will not have times or staff assigned at the time of import. These will be imported into a category called Unassigned. Or you may have jobs which need to be done, without a specific timeframe, which are scheduled in around other jobs. These may be categorized as unassigned.

Filtering by job status, available options are as per the screen shot below.



Reschedule required appears when a job list when a mobile worker has requested the office reschedule a job.

4940	PO 852369	Excavation	Daffy Duck	Youth Services	99 Canberra Avenue Griffith	RESCHEDULE REQUIRED	25/11/2015 14:00
------	-----------	------------	------------	----------------	-----------------------------	---------------------	------------------

When you select this, a screen will display asking if you would like to transfer some of the attached items from the original job to the new job. Tick the boxes of those items you would like transferred to the new job and select **SUBMIT**.

Tree	32 Northbourne Ave Canberra	Rescheduled By Lucas Darling	06/10/2014 11:00			Print
	64 MacKillop Drive Baulkham Hills	Rescheduled By Lucas Darling	03/10/2014 16:00			Print

Viewing Jobs Details On Office PC

Job Detail:- click on the job ID number and details of the job will then be displayed

EDIT JOB - JOB ID # 33354

Job Detail | Staff Detail | Customer Detail | E Mail - SMS | Work Time | Parts Used | Image & Signature | Job Notes | Location - Map | Invoice | Received Payment | Job Documents

Job Detail

Job Information

Client	Woolmers estate
Contact Person	Paul
Contact No	0407 858 715
Contact No 2	03 63123456
Job Description	Mend fence
Job Customer Ref	PD 2356
Job Start Date - Time	29-04-2015 09:00
Duration hour(s)	0.30
Address 1	Woolmers lane
Address 2	
Suburb	longford
State	tas
PostCode	7000
Country	AUSTRALIA
Priority	Normal
Status	Assign
Assign to Staff	Quentin Bird - Available Lucas Darling - Sick Leave Annie Spencer - Available Daffy Duck - Available

OR Broadcast to: All

Comment: Call before arriving

Job Additional Fields

Reminder
Registration Number
Apply script to job signature
Apply forms to job status

EDIT JOB | CANCEL JOB | PRINT OUT

Staff Detail:- Staff Allocated to the Job is displayed

EDIT JOB - JOB ID # 1426

Job Detail

Staff Detail

Customer Detail

E-Mail - S

Staff Detail

Firstname	Luca
Lastname	Darling
Mobile	0427143422
Email	ldarling@hotmail.com
Phone	03 63319402
Company	
Hourly Rate	\$10.00
Overtime Rate	\$15.00

Customer Detail:- Shows Customers Contact Information

EDIT JOB - JOB ID # 33354

Job Detail

Staff Detail

Customer Detail

E Mail - SMS

Work Time

Parts Used

Image & Sign

Customer Detail

Code	abc
Firstname	Damian
Lastname	Kentucky
Company name	Woolmers estate
Business Type	NFP
ABN	
Email	gm@woolmers.com.au
Phone	03 63123456
Mobile	412345678
Fax	
Address #1	Woolmers lane
Address #2	
Suburb	longford
Postcode	7000
State	tas
Country	AUSTRALIA

Email-SMS:- Use this menu to send a reminder email and SMS to the client and the mobile worker.

Greener Pastures is the Customer.

Luca Darling is the mobile staff. Select the top box for email and bottom box for SMS enter the message and **SEND**

Job Detail

Staff Detail

Customer Detail

E-Mail - SMS

Work Time

Parts Used

Image & Signature

Job Notes

Location - Map

Invoice

Received Payment

Email

Send Email & SMS To:

Customer

Greener Pastures Community Care

SMS 61407 858 715

Staff

Luca Darling

SMS 61427143422

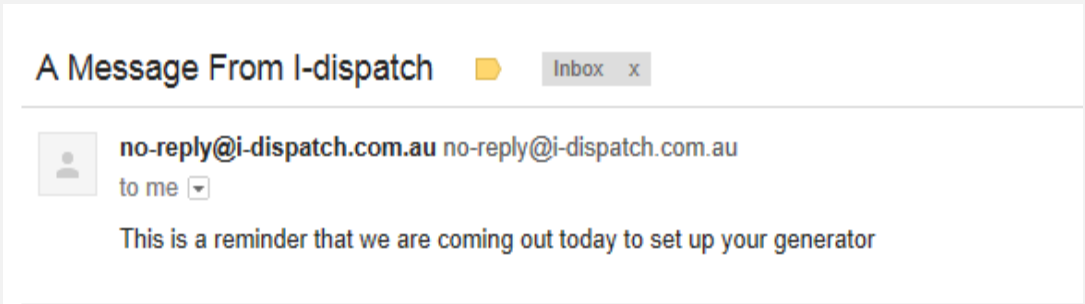
Message

Please go to reception and ask for Garry the Maintenance Manager

SEND !

Sender	Sent To	Recipient	Type	Message	
Philippa Durante	Customer	Fiona Elijah	Email	testtesttest	24/09/2018 15:28
Philippa Durante	Staff	Luca Darling	Email	testtesttest	24/09/2018 15:28
Philippa Durante	Customer	Fiona Elijah	SMS	testtesttest	24/09/2018 15:28
Philippa Durante	Staff	Luca Darling	SMS	testtesttest	24/09/2018 15:28

The system will confirm any emails or SMS's sent in the table below the sending options. See Email Example Below



Work Time:-

Click on the job ID and select work time. Three time options will display.

System work time which is the time calculated automatically between starting and completing a job. And normal and overtime, both derived from Timelog entries via the mobile device.

When an employee does not register a time log on the mobile device, this may be added by the office user.

NOTE: The option to add a time log from the office module will only display once the status of the job is Completed.

Job Detail

Staff Detail

Customer Detail

E-Mail - SMS

Work Time

Parts Used

Image & Signature

Job Notes

Location - Map

Invoice

Received Payment

Job Documents

Attention Message

The job has been completed, it can be closed anytime.

* The invoice has not yet been generated. To generate an invoice click on the invoice tab above.

CLOSE JOB NOW

System Work Time

Description	Hour	Hour Rate	Total (inc. Tax)
System Work Time	0 hour(s) and 2 minute	\$25.00	50.42

Add Time Log

Time:

0 hour(s) 00 minute(s)

Time:

Regular Time

ADD TIME LOG

Normal Time Work

Date	By	Description	Hour	Hour Rate	Total (inc. Tax)
Showing total () entries					

Over Time Work

Date	By	Description	Hour	Hour Rate	Total (inc. Tax)
Showing total () entries					

Part Used:- Use this menu to show Parts Used on the Job (as keyed in on Smart Phone by fieldworker). Parts may also be entered from the office module. When adding parts via the office both the item code and the item name will display to make part identification easier.

Part List

Part Name	Part Code	Description	Sent By	Added Time	HasAttachment?	Quantity	Price	Total(inc. Tax)	Delete
Clean Interior	Cleanint	Cleaning Interior Vac Dusting Polishing	Staff - Iphone	28/10/2013 8:57:18 AM		2	\$50.00	\$50.60	Delete

Showing total (1) entries

Parts may be entered with a decimal quantity for example 0.5, 1.25 etc. This functionality is available on all three platforms – the office interface and both Android and Apple apps.

Images and Signature:- Use this menu to show Pictures and Signatures taken on the Job.(via Smart Phone)

Image[s]


Signature[s]

Clients are able to download photos and signatures captured as part of a job, to their computer.


Click on the image or signature and the View /Download option will display and select Download.

Where the signature used is a company signature, that is one with scripting attached, the scripting message will display under the signature box


Image(s)



Signature(s)



Company Signature(s)



Good Received

Sending Job Notes:- Sending Notes and Documents from the Office to the Smart Phone. I-Dispatch allows the office to send documents to the Smart Phone relating to each job. These documents may be Instruction Manuals, OH&S Data Sheets etc.

Notes and their attachments, may be sent from Add Job Note, when entering in a job, from the Communicate & Send option on the job list or from Notes within a job.

When selecting the send option under Communicate you may now send either a job note, staff message or SMS via this one control.

- Press Send
- Type in your message. If you are sending the message as a note, you may add an attachment file. [the attachment file will not work for messages or SMS's]
- Select if your communication is a note, message or SMS. It will default to note
- Press Send
- If you are using the SMS option, you will need to purchase SMS credits via the Company Details tab.

ACTION TO:

Job Date	Started Date	Communicate	Print Job	Invoice/Warranty
21/08/2015 12:00		Send	Print	
21/08/2015 12:00		Send	Print	

I-Dispatch Communication Daffy Duck

*The attachment will not be sent via Message, SMS – only via Notes
 *The SMS message will include the first 160 characters of the message

Message	<input type="text" value="Don't forget the milk"/>
File	<input type="button" value="Choose File"/> No file chosen
Job Note	<input type="checkbox"/>
Message	<input checked="" type="checkbox"/>
SMS	<input type="text" value="61407858715"/>

Receiving Job Notes:-

When a mobile worker sends a job note, it will appear on the right hand side of the job screen [as well as under job notes when clicking on the JOB ID.

- Click on the message to see details of the sender, job time the note was written
- To remove the message from the right hand panel tick the box, **Mark As Read**.
- To keep the message displaying in this panel, do not tick the box.

Subscription
Signature Message
Job Documents
Forms
Company Label

Logout

From :
Daffy Duck

Time :
11/02/2015 11:41:24 AM

Note :
responseto message

REPLY

Mark As Read
☒

Received Job Notes

Note test
test

Received Messages

- On the office module it will display with a paper clip indicating an attachment as it comes into the right hand panel. On the notes tab under the JOB ID it will display with a yes.

Test

Note to office

Note to office

Note to office

Note to office

Received Messages

test with atrach

testmess

mess2

mess

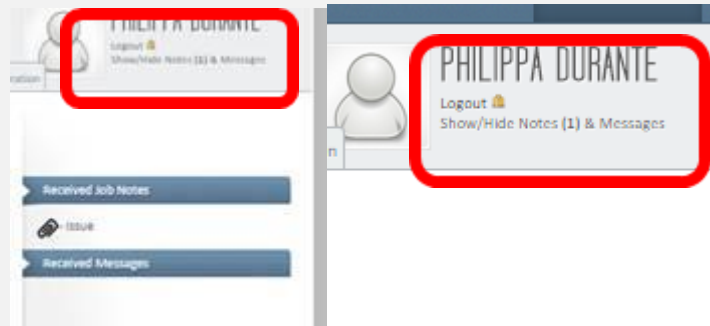
test with att

test message

by Mobile User

Sender	Sent Time	Read Note	Attachment
Luca Darling	Friday, 1 May 2015 3:04 PM	NO	NO
Luca Darling	Friday, 1 May 2015 3:04 PM	NO	YES
Showing total () entries			

- An option to display or hide the messages and notes on the right hand side of the job screen is available. If this panel is hidden it makes more room on the screen for the job fields to display. If jobs or notes are received a number displays, so you can identify that new communications have been received.
-



Location Map:- Use this menu to show locations of all job status updates. Selecting Show in the location column will reveal a map showing the staff member's exact location at the time the status was changed.

Job Detail	Staff Detail	Customer Detail	E-Mail - SMS	Work Time	Parts Used	Image & Signature	Job Notes	Location - Map	Invoice	Received Payment
------------	--------------	-----------------	--------------	-----------	------------	-------------------	-----------	----------------	---------	------------------

Attention Message:
The job has been completed. It can be closed at anytime
[CLOSE JOB NOW](#)

Location Information

Date	Time	By	Job Status	Location
Monday, October 28, 2013	11:49 AM	Luca Darling	Accepted	Show
Monday, October 28, 2013	11:49 AM	Luca Darling	Started	Show
Monday, October 28, 2013	11:51 AM	Luca Darling	Completed	Show
Showing total (3) entries				

Invoice: - This menu item gives the user a number of options 2 options

1. To create an External Invoice. This option would be selected by clients using a 3rd party accounting system to generate their invoices. The invoice details are then entered retrospectively into the job for recording purposes. The invoice number, amount of the invoice and invoice date are entered and submitted.

Job Detail	Staff Detail	Customer Detail	E-Mail - SMS	Work Time	Parts Used	Image & Signature	Job Notes	Location - Map	Invoice	Received Payment
------------	--------------	-----------------	--------------	-----------	------------	-------------------	-----------	----------------	---------	------------------

Attention Message:
The job has been completed. It can be closed at anytime
*The invoice has not yet been generated. To generate an invoice click on the invoice tab above
[CLOSE JOB NOW](#)

Invoice

Attention:
Generate an invoice in a 3rd party accounting system and enter the details below
OR
- Generate an invoice within i-dispatch

Select Invoice Type

☒ External Invoice
☐ Generate Invoice

External Invoice Number - Amount: \$ - Invoice Date: 08-11-2013 [SUBMIT INVOICE DETAILS](#)

- To Generate Invoice option would be selected by client using i-Dispatch to invoice their clients in the first instance. Select if this is for invoice or warranty purposes, apply system hours to the invoice [exact time taken to complete the job] or alternatively apply rounded the time via the TimeLog either as regular or overtime in increments of 15 minutes. Enter the hours and over time to be charged to the client. Any parts allocated during the job will automatically feed through to the invoice. Select Generate Invoice

Job ID # LUTL

Job Detail | Staff Detail | Customer Detail | E-Mail - SMS | Work Time | Parts Used | Image & Signature | Job Notes | Location - Map | Invoice

Attention Message :
The job has been completed. It can be closed at anytime
* The invoice has not yet been generated. To generate an invoice click on the invoice tab above
[CLOSE JOB NOW](#)

Invoice

Attention :
- Generate an invoice in a 3rd party accounting system and enter the details below
OR
- Generate an invoice within i-dispatch

Select Invoice Type

☐ External Invoice
☒ Generate Invoice
☐ Invoice
☐ Warranty

System Hours

4 hours and 29 minutes [APPLY SYSTEM HOURS AS REGULAR HOURS](#)

Time Log - Regular

0 hr(s) **Please enter the total hours to be charged on this invoice**

Time Log - Overtime

0 hr(s) **Please enter the total hours to be charged on this invoice**

Comment

[GENERATE INVOICE](#)

The invoice may be either printed or emailed by selecting the appropriate option on the upper right.

[PRINT](#) [EMAIL TO](#)

i-Dispatch
Pay As You Go

TAX INVOICE

70 Enterprise
Gladys Leamonville, Tas 7230, Australia
Tel: 08 83321422
j@i-dispatch.com.au
ABN: 123456789

TO:
The Vines
1 Tardis Court,
Wynne Vale, SA 5227 (Unknown)

Job number: 23133
AB-Customer ref: Low Maintenance

Product	Description	Qty/Per Item	Unit Price	Price	Qty	Total
Labour Interior	Cleaning Interior View During Painting	1	40.00	40.00	1	40.00
As Rep	As Rep	1	400.00	400.00	1	400.00

If you select to email the invoice, you will then be prompted to check the client email address or enter an email address if a default is not available, before selecting SEND.

Invoice Email

Email Address:

SEND

Company Logos may be added to invoices, .pdf Job card & reports

- Company Details | Company Info
- In the company logo field, press **Choose File** and navigate to and select your logo.
- Select UPDATE COMPANY FILE

Company Details

Company Name: PJ Enterprise

Email: pdurante@i-dispatch.net

Billing email: pjsldurante@gmail.com

Phone: 03 63319402

Mobile: Australia (+61) 0407 858 715

ABN Number(or TAX Number): 123456789

Address #1: Caladh

Address #2: 53 Elphin Road

Suburb: Launceston

PostCode: 7250

State: Tas

Country: Australia

Mailing Address #1: P O Box 30

Mailing Address #2:

Mailing Suburb: Newstead

Mailing PostCode: 7250

Mailing State: Tas

Mailing Country:

Company Logo: Choose File logo.png View Logo

Company Conditions: (Apply for Invoice)

test

UPDATE COMPANY DETAILS

Received Payment: - when an employee receives a payment on site from the client, these details are entered via the mobile unit and then will appear under Jobs and Received Payment.

EDIT JOB - JOB ID # 1439

Job Detail | Staff Detail | Customer Detail | E-Mail - SMS | Work Time | Parts Used | Image & Signature | Job Notes | Location - Map | Invoice | Received Payment

Attention Message:
The job has been completed. It can be closed at anytime
CLOSE JOB NOW

Received Payment

Attention:
Payment has been attached the invoice

The invoice will then reflect that a payment has been received.

PJ Enterprise

PJ Enterprise
Caladh, Launceston, Tas. 7250, Australia
Tel. 03 63319402
pduante@i-dispatch.net
ABN: 123456789

TO:
Sisters
64 MacKillop Drive
Baulkham Hills NSW 2153 Australia

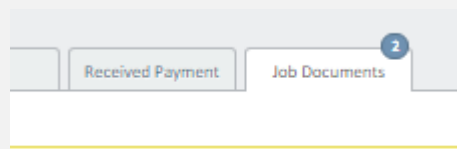
Tax Invoice

DATE 8/11/2013
INVOICE #LD20005

Job number: 1439
Customer order number: SIS: Lawn
Mowing

Product	Description	Price/unit	Quantity	Price	GST	Value
Blood Pressure Machine BPM	base level model 200BN	60.00	1	60.00	6.00	66.00
Labor		0.00	2.00	0.00	0.00	0.00
Labor Overtime		0.00	0.30	0.00	0.00	0.00
				Total	60.00	6.00
						66.00
PAYMENT DATE: 8/11/2013						
PAYMENT METHOD: CASH						
PAYMENT REF: 123cash						
Comments:						
cash						
Our conditions :						
test						

Job Documents When a form or company document [quote or service report] is saved by the mobile worker, these documents may be opened and viewed via the Job documents tab.



Rescheduled List: When the job you open has been part of a rescheduled job sequence. **NOTE** this tab will only display if the job is related to a rescheduled job. This tab will display: all jobs related to this job [before and after this job]; the date the job was rescheduled on and the comment regarding why the job was rescheduled.

Job List

EDIT JOB - JOB ID # 5331

Job Detail | Staff Detail | Customer Detail | E Mail - SMS | Work Time | Parts Used | Image & Signature | Job Notes | Location - Map | Invoice | Received Payment | Job Documents | **Rescheduled List**

Attention Message:
Job has been rescheduled by 1 The reason: test...Click for the details
This Job has been rescheduled from Job Number: 5274 | Click for the details

Reschedule Detail

Rescheduled From JOB ID	Rescheduled To JOB ID	Rescheduled On	Comment
5331	5443	7/08/2015 9:30:00 AM	test
5274	5331	1/08/2015 3:30:30 AM	tester

Showing total (2) entries

Job Recurrence

In some businesses, jobs may have a pattern of repetition. For example a lawn mowing business may have regular clients whose lawn is mown fortnightly. Rather than entering a new job every fortnight, a recurrence may be setup, so the job will automatically reappear every fortnight.

Select Recur job on the main job list

Search

Job ID: | Staff: | Client: ☐ Include Sub Clients Jobs | Job Status: | From: | To:

Export To:

Job ID	Customer Ref No	Title	Staff	Customer	Address	Status	Job Date	Started Date	Send Note	Print Job	Invoice/Warranty	Sublet Invoice/Warranty	Recur Job	Export
1419	ABC head office	Clean Guttering	Luca Darling	ABC Real Estate	1/830 High Street	<input type="button" value="ASSIGN"/>	23/11/2013 10:30		Send	Print			Recur	<input type="checkbox"/>
1420	Accept - Reschedule	Testing Mobile to Accept - Reschedule	Luca Darling	Zanzerl	1 Princess Street Kew	<input type="button" value="ASSIGN"/>	22/11/2013 10:00		Send	Print			Recur	<input type="checkbox"/>
1412	ABC head office	Clean Guttering	Luca Darling	ABC Real Estate	1/830 High Street	Rescheduled	21/11/2013 10:00		Send	Print			Recur	<input type="checkbox"/>

Then select the frequency of the recurrence – daily, weekly or monthly. From here further options will be given as to the cycles of recurrence. For example if weekly is selected, the prompts will then be every ? weeks, and what day of the week. And how long the recurrences should continue.

TIP: when selecting the start date of the recurrence remember that the job has already been entered and saved. Therefore by starting the recurrence on the same day as the entered job will create a duplication. If the job is fortnightly, the original job entry will be in week one and the recurrence start date will be week 3.

Create Recurrence Job

Select Date Range...

Recurrence Range

Start:

☐ For 12 months

☐ End After: occurrences

☒ End By:

Recurrency Alert If any job that currently has recurrences attached AND these recurrences are going to cease within the next month, then this tab will appear on the jobs screen. Jobs will be listed with the first and last date of the recurrences.

Jobs

Recurred Jobs List

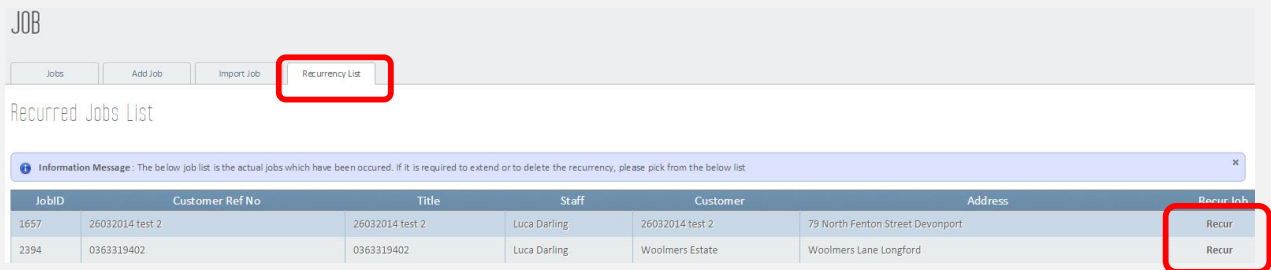
JobID	Customer Ref No	Title	Staff	Customer	Address	The First Booked Date	The Last Booked Date	Recur Job
51	BSHEL00594	Thursday Week Two	<input type="text"/>	<input type="text"/>	Birmingham Road, opposite Emmanuel College Carrara	14/11/2013 09:00	13/11/2014 09:00	Recur
216	BSHEL00324	Thursday Week One	<input type="text"/>	<input type="text"/>	Opposite 4 Brooke Avenue Southport	07/11/2013 09:00	13/11/2014 09:00	Recur
285	BSHEL00244	Monday Week One and Two	<input type="text"/>	<input type="text"/>	28/0 Gold Coast Highway Surfside Paradise	04/11/2013 09:00	03/11/2014 09:00	Recur

Select Recur on the far right, and recur the jobs as usual for the next 12 months. Once the new recurrence is saved, this job will drop out of the alert list.

Identify original job.

When you have a contract to complete a job fortnightly for a client, this is set up as a recurring job in i-Dispatch. If the contract ends and the jobs beyond the end date need to be removed from your system, how do you find the original job in the sequence? We have added a new tab on the jobs screen called **Recurrency List**. This list displays any jobs which have a recurrency which has been created from them.

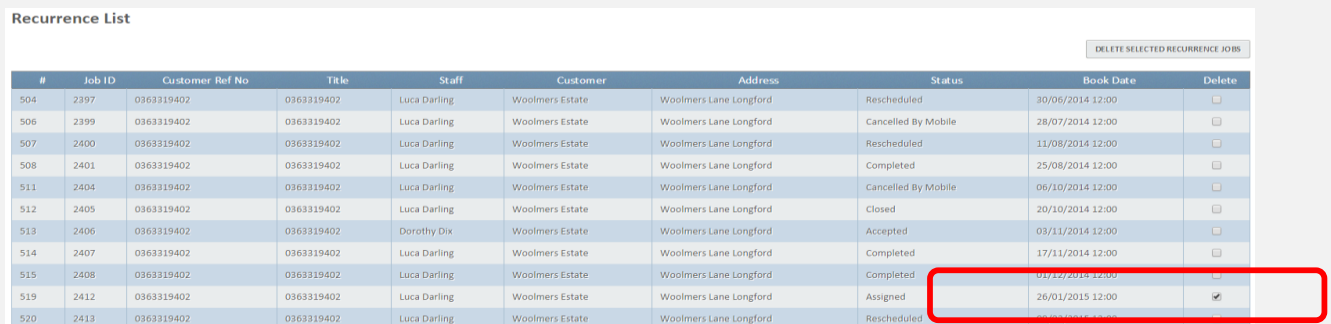
1. To remove any recurring jobs, select Recurrency List



The screenshot shows the 'JOB' screen with a navigation bar at the top containing 'Jobs', 'Add Job', 'Import Job', and 'Recurrency List'. The 'Recurrency List' tab is highlighted with a red box. Below the navigation bar, the title 'Recurring Jobs List' is displayed. An information message states: 'The below job list is the actual jobs which have been occurred. If it is required to extend or to delete the recurrency, please pick from the below list'. Below the message is a table with columns: JobID, Customer Ref No, Title, Staff, Customer, Address, and Recur job. Two rows are visible, both with 'Recur' in the 'Recur job' column, which is highlighted with a red box.

JobID	Customer Ref No	Title	Staff	Customer	Address	Recur job
1657	26032014 test 2	26032014 test 2	Luca Darling	26032014 test 2	79 North Fenton Street Devonport	Recur
2394	0363319402	0363319402	Luca Darling	Woolmers Estate	Woolmers Lane Longford	Recur

2. Identify the job and press Recur
3. Scroll down to see the list of recurrent jobs originating from this job
4. Tick in the delete column of any jobs you would like to delete from your system.



The screenshot shows the 'Recurrence List' screen. At the top right, there is a button labeled 'DELETE SELECTED RECURRENCE JOBS'. Below this is a table with columns: #, Job ID, Customer Ref No, Title, Staff, Customer, Address, Status, Book Date, and Delete. The table contains 12 rows of data. The 'Delete' column has checkboxes. The row with Job ID 2412 and Status 'Assigned' is highlighted with a red box, and its checkbox is checked.

#	Job ID	Customer Ref No	Title	Staff	Customer	Address	Status	Book Date	Delete
504	2397	0363319402	0363319402	Luca Darling	Woolmers Estate	Woolmers Lane Longford	Rescheduled	30/06/2014 12:00	<input type="checkbox"/>
506	2399	0363319402	0363319402	Luca Darling	Woolmers Estate	Woolmers Lane Longford	Cancelled By Mobile	28/07/2014 12:00	<input type="checkbox"/>
507	2400	0363319402	0363319402	Luca Darling	Woolmers Estate	Woolmers Lane Longford	Rescheduled	11/08/2014 12:00	<input type="checkbox"/>
508	2401	0363319402	0363319402	Luca Darling	Woolmers Estate	Woolmers Lane Longford	Completed	25/08/2014 12:00	<input type="checkbox"/>
511	2404	0363319402	0363319402	Luca Darling	Woolmers Estate	Woolmers Lane Longford	Cancelled By Mobile	06/10/2014 12:00	<input type="checkbox"/>
512	2405	0363319402	0363319402	Luca Darling	Woolmers Estate	Woolmers Lane Longford	Closed	20/10/2014 12:00	<input type="checkbox"/>
513	2406	0363319402	0363319402	Dorothy Dix	Woolmers Estate	Woolmers Lane Longford	Accepted	03/11/2014 12:00	<input type="checkbox"/>
514	2407	0363319402	0363319402	Luca Darling	Woolmers Estate	Woolmers Lane Longford	Completed	17/11/2014 12:00	<input type="checkbox"/>
515	2408	0363319402	0363319402	Luca Darling	Woolmers Estate	Woolmers Lane Longford	Completed	01/12/2014 12:00	<input type="checkbox"/>
519	2412	0363319402	0363319402	Luca Darling	Woolmers Estate	Woolmers Lane Longford	Assigned	26/01/2015 12:00	<input checked="" type="checkbox"/>
520	2413	0363319402	0363319402	Luca Darling	Woolmers Estate	Woolmers Lane Longford	Rescheduled	06/02/2015 12:00	<input type="checkbox"/>

5. **Please note** – you may only delete a job if the job status is Assigned.

Recur jobs as Unassigned

For clients who recur jobs for the future, sometime is it not possible to know which staff member is the most appropriate to undertake the work 6 months from now.

A new field has been added to the create Recurrence job Screen allowing the mobile staff member to be set to unassigned for the recurrences.

Create Recurrence Job

Select Date Range... ▼

Recurrence Range

Start: 28-08-2015

☐ For 12 months

☐ End After: occurrences

☐ End By: 28-09-2015

Mobile Staff Member

Unassigned ▼

Apply the following items

☐ Company Forms

☐ Company Signatures

CREATE RECURRENCE JOBS

Copy Company signatures and company forms from original job to recurring jobs

When a job is created with a company signature and or company form is attached and then this job is recurred, you now have the option of applying the company signature and form to the recurred jobs

1. Create the original job and attach the company signature and or company form required
2. Select Recur to move to the recur screen and set your recurrence options as per normal
3. Tick to apply company forms and or company signatures

☐ End After: occurrences

☐ End By: 30-06-2014

Apply the following items

☐ Company Forms

☐ Company Signatures

4. Click CREATE RECURRENCE JOBS

PDF Job Cards

Tick the jobs to export and select Export To Job card PDF Format and press SUBMIT

Export To: Job Card PDF Format ▼ **SUBMIT**

voice/Warranty	Sublet Invoice/Warranty	Recur Job	Export
show Invoice		Recur	<input checked="" type="checkbox"/>

Tick the items you would like to print out with the Job Card, or select Check All, and press SUBMIT

 Please select to be exported :

☐ Check/Uncheck All

☐ Job Detail

☐ Job Parts

☐ Job Photos

☐ Job Signatures

☐ Job Company Signatures

☐ Job Notes

☐ Job Notes Attachment

☐ Service Reports

☐ Quotes

☐ Company Forms

☐ Invoice

SUBMIT

A list of the various documents will display for downloading and display as done previously.

DOWNLOAD FORM #SWMS

DOWNLOAD PDF FILE - #1690

DOWNLOAD PDF FILE - #4029

DOWNLOAD PDF FILE - #2622

DOWNLOAD PDF FILE - #4599

DOWNLOAD PDF FILE - #4503

DOWNLOAD PDF FILE - #1694

PLEASE NOTE: Company forms and Quotes/Service reports will print out to separate pdf documents. Job notes and Job images will be included as part of the main document, but will print on separate pages.

Chapter 6: Schedule

Scheduler View

The screenshot shows the i-Dispatch Scheduler View. At the top, there's a navigation bar with icons for Dashboard, Staff, Jobs, Schedule (active), Reports, Clients, and Company Details. Below the navigation bar, the word "i-Dispatch" is prominently displayed, followed by "SCHEDULE". On the right side of the header, there's a user profile for "PHILIPPA DUFANTE" with a "Logout" button. The main area is a calendar grid showing the week from Monday, October 20 to Sunday, October 26. The grid is color-coded by day: Monday (grey), Tuesday (yellow), Wednesday (green), Thursday (blue), Friday (light blue), Saturday (light blue), and Sunday (light blue). Jobs are represented by colored blocks within the grid, indicating their status and duration. On the left side of the grid, there are filters: "Scheduler" (selected), "EXPORT TO PDF", and "All Mobile Staff". On the right side, there's a "Job Status" legend with a list of status options: Unassigned, Assigned, Accepted, Started, On-Hold, In-Progress, Completed, Closed, Rescheduled, CNA By Administrator, and CNA By Mobile. Below the legend are buttons for "UPDATE SCHEDULER", "Received Job Notes", and "Received Messages".

The default view is the current week, all mobile employees, all job status's. Jobs will display in the scheduler as scheduled view. They will display coloured as per their current status. [key is on the right]. Today will be marked with grey through the date header. Jobs will display that are booked between 6am and 6pm [business hours]

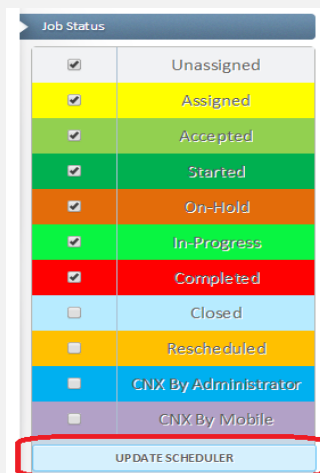
On the left hand side you will see scheduler, indicating that the scheduler is your current view option.

This image is a close-up of the "Scheduler" dropdown menu. The menu is open, showing a list of options. The "Scheduler" option is highlighted with a red box. Below it, there's an "EXPORT TO PDF" button. Then, there's another dropdown menu labeled "All Mobile Staff" which is also highlighted with a red box. This dropdown menu is open, showing a list of names: Quentin Sparrow, Luca Darling, Catherine Bird, Dorothy Dix, Peony Rosemond, Pip Mobile Durante, Mini Mouse, and Fiona Bardh.

EXPORT TO PDF on the left, will allow you to print a screen shot of the scheduler as it appears on the screen.

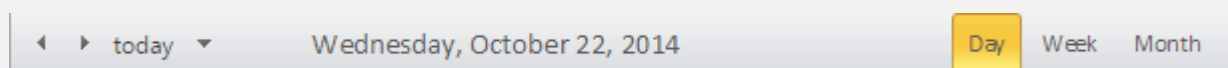
Filter jobs by mobile staff member. On the left, the default will be All Mobile Staff. You may select the drop down and click on the name of one particular mobile employee, then the scheduler will refresh to only show jobs allocated to this person.

Filter jobs by job status. Ticking or unticking job status key selections on the left then selecting UPDATE SCHEDULER, will cause the schedule to only display jobs of the status requested. For example you may not wish to show jobs cancelled, closed or rescheduled, so untick these and UPDATE SCHEDULER

A vertical panel titled "Job Status" with a list of job status options, each with a checkbox. The options are: Unassigned (checked), Assigned (checked), Accepted (checked), Started (checked), On-Hold (checked), In-Progress (checked), Completed (checked), Closed (unchecked), Rescheduled (unchecked), CNX By Administrator (unchecked), and CNX By Mobile (unchecked). At the bottom of the panel is a button labeled "UPDATE SCHEDULER", which is highlighted with a red rectangular border.

Job Status	
<input checked="" type="checkbox"/>	Unassigned
<input checked="" type="checkbox"/>	Assigned
<input checked="" type="checkbox"/>	Accepted
<input checked="" type="checkbox"/>	Started
<input checked="" type="checkbox"/>	On-Hold
<input checked="" type="checkbox"/>	In-Progress
<input checked="" type="checkbox"/>	Completed
<input type="checkbox"/>	Closed
<input type="checkbox"/>	Rescheduled
<input type="checkbox"/>	CNX By Administrator
<input type="checkbox"/>	CNX By Mobile
UPDATE SCHEDULER	

Date selection options: Above the scheduled jobs is your date selection bar. The < arrow will take you back and the > arrow will take you forward. If your selection on the right is **Day**, then the arrows will take you back and forward a day. If your selection on the right is **Week**, then the arrows will move you back and forward a week. If your selection is **Month**, then the arrows will move you back and forward a month. If you select the down arrow ▼ to the right of today a calendar will display and you may select a specific date.

A horizontal bar for date selection. On the left, there are navigation arrows (left and right) followed by the text "today" and a dropdown arrow. In the center, the date "Wednesday, October 22, 2014" is displayed. On the right, there are three buttons: "Day" (highlighted in yellow), "Week", and "Month".

< > today ▼ Wednesday, October 22, 2014 Day Week Month

View job Details: Hover your mouse over a job on the scheduler to see the details. Click Show On Map at the bottom of this information to see where the job is. ***TIP** this will help in allocating subsequent jobs close to where the employee is currently working. Use the roller on your mouse to increase or decrease the focus on the map.

Fix Tap Washer

JOB ID: 2619
 Job Booked on: 22/10/2014 10:30
 Job Status: Started
 Mobile Staff: Quentin Sparrow
 Customer: Woolmers Estate
 Address: Woolmers Lane Longford 7301 Tas
 Description:

Show On Map

Edit a job: Double click on a job on the calendar to open it up to edit it or cancel it.

Add a job directly via the calendar, right click on an empty space and left click on Add Job. A quick job entry form is available. *** NOTE** adding a job via the scheduler is designed to be a quick entry option. If you require additional fields, forms, signatures etc, these will need to be added via the Add Job entry point under the Jobs tab.

Job Detail

Job Title: Clean Guttering
 Status: Assigned
 Client: Dragonfly
 Contact Person: Darren
 Contact No: 08 63319402
 Job Start Date: 23/10/2014 10:30 AM
 Duration hour(s): 0.30
 Address 1: 56 Dodgin Street
 Suburb: Wynyard
 State: Tas
 PostCode: 7230
 Country: Australia
 Assign to Staff: Quentin Sparrow
 Comment: Access via rear laneway

ADD JOB

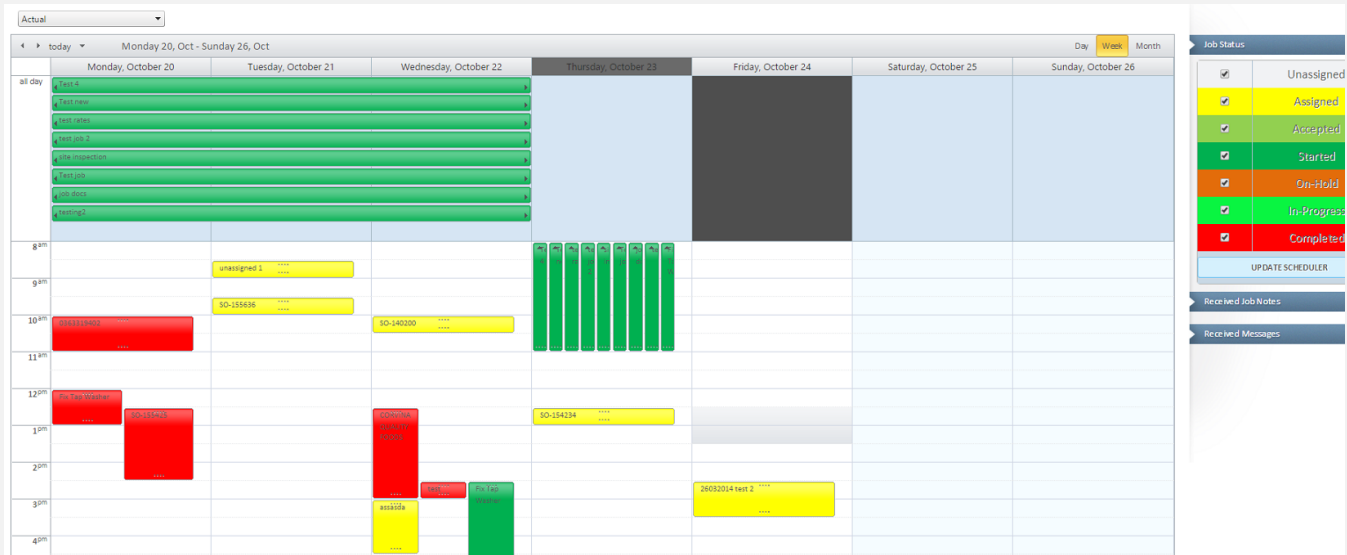
View jobs booked over a 24 hour day, on the bottom left hand side select Show 24 hours

5pm

Show 24 hours...

Actual View

Change the view to Actual, you will see the actual time of the jobs. Therefore if a job was started and not completed, this will display as started and continue on [see the green bars on the below screen shot representing incomplete jobs]. If a job was due for completion at 10:30, but actually finished at 10:00, you can see this with this view.

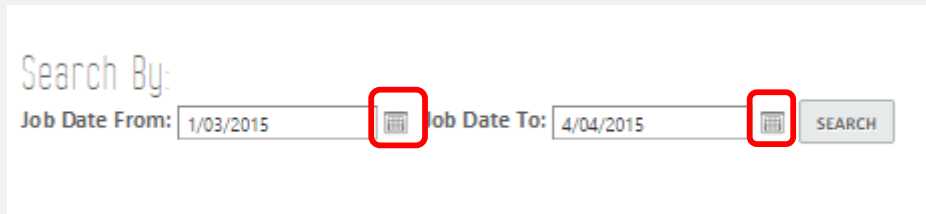


- Jobs may be viewed, edited and added as per the scheduler view
- Choice of displayed jobs by status is as per scheduler view
- Option to display business hours or 24 hours is as per scheduler view

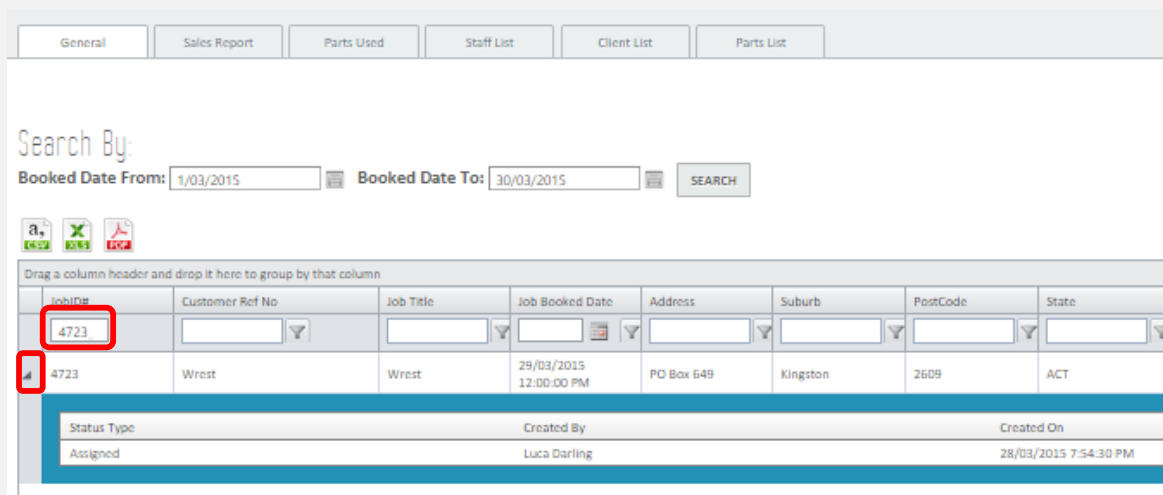
Chapter 7: Reports

General Report

To select data: Enter in your date range parameters by clicking on the calendar icons at the right of each date field. Select SEARCH



Data listed on the General report: JOB ID; Customer Ref No; Job Title; Job Booked Date; Address; Suburb; Postcode; State; Status Type; Client; Staff, Data from the 3 additional fields [only if data is entered against these fields]

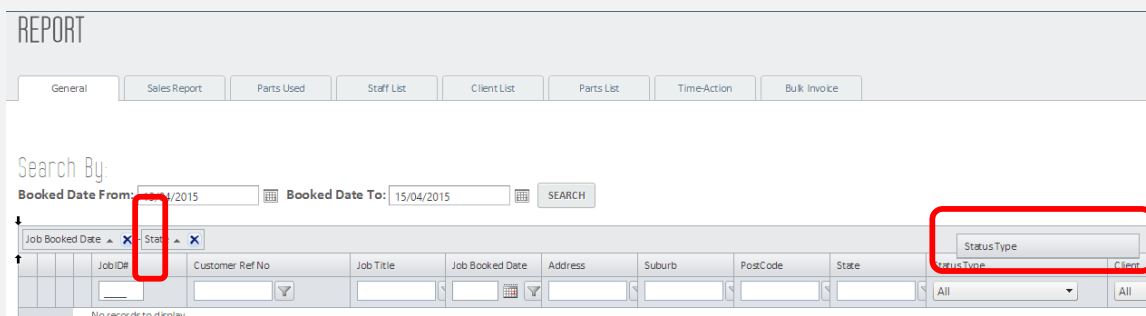


To search by Job, enter in the JOB ID in the search box

To see details of a job, click on the arrow to the left of the job ID

Reorder report data: To reorder the data on the report drag and drop the column headings.

- Click on the column label you would like the report to sort by



- When you see the arrows appear on either side of the line on the far left, let go of the mouse click.

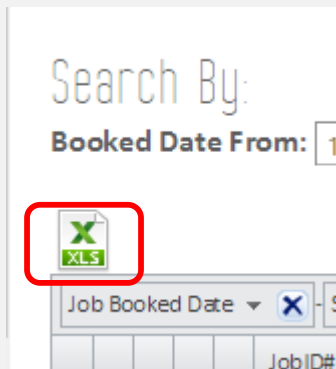
- Repeat this process with as many headings as you wish to sort by

Search By:
 Booked Date From: 1/03/2015 Booked Date To: 31/03/2015 SEARCH

Job Booked Date: X State: X ID: X

Job ID#	Customer Ref No	Job Title	Job Booked Date	Address	Suburb	PostCode	State	Status Type
Job Booked Date: 9/03/2015 4:00:00 PM								
State: ACT								
ID: Assigned								
26810	PO 123	Check Door	9/03/2015 4:00:00 PM	99 Canberra Avenue	Griffith	2901	ACT	Assigned
Job Booked Date: 9/03/2015 3:45:00 PM								
State: ACT								
ID: Assigned								
5138	delivery of goods	Delivery	9/03/2015 3:45:00 PM	17 Franklin St	Manuka	2603	ACT	Assigned
Job Booked Date: 9/03/2015 12:00:00 PM								
State: ACT								
ID: Assigned								
23094	Low Maintenance	Quote on rejuvenation	9/03/2015 12:00:00 PM	16 Mildura Street	Fyshwick	2609	ACT	Assigned
23356	Low Maintenance	Quote on rejuvenation	9/03/2015 12:00:00 PM	16 Mildura Street	Fyshwick	2609	ACT	Assigned
Job Booked Date: 6/03/2015 9:00:00 AM								
State: ACT								

Saving data to .xls. Click on the icon of the format you would like to save the report to. This will display on the upper left of the report and will save to the download folder on your computer.



Sales Report

Enter in your date range parameters by clicking on the calendar icons at the right of each date field. Select SEARCH

Data listed on the Sales report: Invoice Number; Job Title; Invoice Date; Client; Staff; Payment Received; Amount; GST; GST incl. Amount; Customer Ref Number and Job Number.

The sales report is great to clearly see which job's payments are outstanding and what the amount of these payments are.

	Payment Received?	Amount	GST	AmountGST
	NO			
	NO	\$604.00	\$6.00	\$610.00
	NO	\$120.00	\$1.20	\$121.20
	NO	\$175.33	\$6.90	\$182.23
	NO	\$136.67	\$1.20	\$137.87
	NO	\$640.00	\$14.50	\$654.50
		\$1,676.00	\$29.80	\$1,705.80

Parts Used

Enter in your date range parameters by clicking on the calendar icons at the right of each date field. Select SEARCH

Data listed on the Part Used report: JobID; Job Title; Job Booked Date; Mobile staff; Part Added by; Part code; Part Name; Purchase Price; Sales Price; Sales Price Charged; Quantity; GST; Total; Gross Margin; Gross Margin as a %

This report is great to see what parts and how many have been used for inventory control purposes. Also if a product is recalled, you can easily identify which customers have been allocated the part. And assess your part charges to ensure that your costs are being covered.

Example Part Code entered Tap, with filter Contain selected, will pick up any part codes with the word tap in the code for example Tap Washers. I can then see 50 Tap washers have been used in the selected date range.

Part Code	Part Name	Purchase Price	Recommended Sale Price	Sale Price Charged	Quantity	GST
Tap						
Tap Washer	Tap Washer	\$2.00	\$3.50	\$3.50	50	\$1
Total parts 1		\$2.00	\$3.50	\$3.50	50.00	\$1
Total parts 1		\$2.00	\$3.50	\$3.50	50.00	\$1

Resizing columns: In order to display a filter, you may need to resize a column.

- Click on the line between the column you would like to increase and the next column to the right.
- A two sided arrow will appear with a message Drag to resize
- Drag the line between the two columns to the right to increase the size of the left column

Part Name	Purchase Price	Quantity ▼	GST Charged	Se
			Drag to resize	CI
Mowing Lawns	\$30.00	1	\$0.60	\$6
Mowing Lawns	\$30.00	1	\$0.60	\$6
Total parts 2	\$60.00	2.00	\$1.20	\$1

- This method may also be used to hide columns, by dragging one column into the next

Staff List

Select GET STAFF LIST

Data listed on the Staff List report: Staff ID; First Name; Last Name; Role; Mobile Number; Email; Active/Inactive; Created date

Parts Used	Staff List	Client List	Parts List
Group by that column			
▼	<input type="text" value=""/>	<input type="text" value="Mobile"/>	<input type="text" value=""/>
	Sparrow	Mobile Staff	0427500738
	Darling	Mobile Staff	03 63319402
	Bird	Mobile Staff	407 858 715
	Carr	Mobile Staff	407 858 715
	Erico	Mobile Staff	411111111
	Char	SubContracter Mobil	411111111
	Dix	Mobile Staff	407858716
	Bardh	SubContracter Mobil	0407858715
	Rosemond	Mobile Staff	0407 856 719
	Trouble	Mobile Staff	0407858715
	Durante	Mobile Staff	421450581
	Mouse	Mobile Staff	421450581
	membership2	Mobile Staff	421450581

In order to filter the report by all mobile staff, enter Mobile in the filter box and select **Contains**, this will select all staff with the word Mobile in their role.

It is great to have a list of current staff to compare against your payroll.

Client List

Select GET CLIENT LIST

Data listed on the Client List report: Client ID; Client Name; Client Code; Company; First Name; Last Name; Mobile; Phone; Email; Address 1; Address 2; Suburb; Post Code; State; Created Date.

Client List

Parts List

	Contact Firstname	Contact Lastname	Mobile	Phone	Email	Address 1
	10	2	407858715	0407858715	pjsidurante@gmail.com	
	Anna	pepper	407858715	03 63319402	pjsidurante@gmail.com	
	testing	testing	0407858715	0407858715	pdurante@i.dispatch.net	
	22:19	22:19	0407858715	0407858715	pdurante@i.dispatch.net	
	test	test	407858715	0363319402	pdurante	
2	26032014 test 2	26032014 test 2	0407858715	03 63319402	pdurante@i.dispatch.net	
	3006	2014	407858715	0407858715	pdurante@i.dispatch.net	
				02 6257 7779	mkadinski@hoys.co	
	4.3.21 testing	4.3.2	61	pdurante@i.dispatch.net	manager	
	5/8/14	5/8/15	407858715	0407858715	pdurante@gmail.com	
	a	a	1	1	a	
			0417 617 466	07 6228 1882	cal-c@barlascart	

NoFilter

Contains

DoesNotContain

StartsWith

EndsWith

EqualTo

NotEqualTo

GreaterThan

LessThan

GreaterThanOrEqualTo

LessThanOrEqualTo

Between

NotBetween

IsEmpty

NotIsEmpty

IsNull

NotIsNull

To sort by all clients with email addresses select the filter icon and the option **Not is Empty** and only clients with email addresses will display.

This report is really useful for reviewing to ensure that customer contact details are up to date and to see gaps which may need to be filled. This may also be used for mail merges to keep in regular contact with clients.

Example – to find any new clients – for customer relations purposes - Select created date 1/1/2015 and the filter Greater Than. This will display any new clients added to the database since the 1/1/2015.

Received Job Notes	
Received Messages	
State	Created Date
Tas	20/03/2015 12:15
Unknown	18/02/2015 22:00

Parts List

Select GET PARTS LIST

Data Listed on the Part List report: Part ID; Part Name; Part Code; Purchase Price; Sales Price; Tax Rate; Active/ Inactive; Created Date.

Parts List				
Part Code	Purchase Price	Sale Price	Tax Rate	Active/Inactive
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="10"/>	<input type="text"/>
BRACKET,CANTILEVER BRACED 635MM HDG	\$10.00	\$10.00	10	
CarVac	\$15.00	\$25.00	10	
GM	\$17.50	\$20.00	10	
Materials	\$25.00	\$30.00	10	
RR	\$25.00	\$30.00	10	
Test	\$0.00	\$0.00	10	

To filter all parts with a 10 % tax rate, Type 10 in the filter box then select **EqualTo**. Only parts with a tax rate of 10% will then be listed.

Purchase Price	Sale Price	Tax Rate	Active/Inactive
<input type="text"/>	<input type="text"/>	<input type="text" value="10"/>	<input type="text" value="Active"/>
\$10.00	\$10.00	10	Active
\$15.00	\$25.00	10	Active
\$17.50	\$20.00	10	Active
\$25.00	\$30.00	10	Active
\$25.00	\$30.00	10	Active
\$0.00	\$0.00	10	Active
\$100.00	\$120.00	10	Active

You are able to filter data by more than one criteria at a time, for example filter all active parts with a 10% tax rate.

This report is useful to ensure that your parts list is current that and that any parts made obsolete and replaced or parts which have undergone pricing changes have been deactivated and replaced in your database.

Time –Action

Enter in your date range parameters by clicking on the calendar icons at the right of each date field. Use the drop down arrow to select your employee then press SEARCH

Data Listed on the Time-Action report: Date, time; Address; JobID; Status: Client; Staff; Description; Job Duration; Shift Duration, Travel Duration, Time Log entries or normal and overtime and Customer Reference Number.

This report is great to use as a timesheet tool, to assist in the accurate production of payroll data. It provides simple analysis of billable time on the job, travel time and other time to make up a daily hours.

Company Name: PJ Enterprise
 Date Report Generated: 14/04/2015
 Report Generated by: Philippa Durante

Employee Time Sheet For the Period - 5/2/2015 15:12 - 11/2/2015 15:12

	Date Time	Address	JobID	Status	Client
	Date: 10/2/2015				
	10/02/2015 15:32	53 Elphin Rd, Launceston TAS 7250, Australia		Shift Started	Luca Darling
	10/02/2015 15:32	53 Elphin Rd, Launceston TAS 7250, Australia		Travelling Started	Luca Darling
	10/02/2015 15:42	53 Elphin Rd, Launceston TAS 7250, Australia		Travelling Ended	Luca Darling
	10/02/2015 16:12	53 Elphin Rd, Launceston TAS 7250, Australia	2634	Started	Woolmers Estate
	10/02/2015 16:37	53 Elphin Rd, Launceston TAS 7250, Australia	2634	Completed	Woolmers Estate
	10/02/2015 16:50	53 Elphin Rd, Launceston TAS 7250, Australia		Shift Ended	Luca Darling
	10/02/2015 17:02	53 Elphin Rd, Launceston TAS 7250, Australia	4488	Started	Woolmers Estate
	10/02/2015 20:27		4488	Completed	Woolmers Estate
	10/02/2015 20:27		4490	Started	26032014 test 2
	10/02/2015 20:42			Travelling Started	Luca Darling
	10/02/2015 20:42			Shift Started	Luca Darling
	10/02/2015 20:43		4490	Completed	26032014 test 2
	10/02/2015 20:46		2413	Started	Woolmers Estate
					Luca Darling

Bulk Invoice

In the instance where you may do multiple jobs for the one client, we now have the option of including multiple jobs on the one client invoice.

General

Bulk Invoicing

Uninvoiced Jobs List

Information Message: Please search based on a client and tick from the list and generate an invoice

ABC Car Rentals - A Class Cars

From: 01-10-2013

To: 28-11-2013

SEARCH

Client:

Invoice To:

Job ID	Customer Ref No	Title	Staff	Customer	Address	Job Date	Export
2668	Car Detail ABC Car Rentals	Car Detailing	Lucas Darling	ABC Car Rentals	123 High Street	14/10/2013 12:15	<input checked="" type="checkbox"/>
2734	Brown Merc 125 Car Detail	Car Detailing Merc 125	Lucas Darling	ABC Car Rentals	123 High Street	29/10/2013 10:00	<input checked="" type="checkbox"/>

Showing total () entries

- o Select the client, and date range of jobs.
- o Tick the export box and Submit

REPORT

General

Bulk Invoicing

Uninvoiced Jobs List

Information Message: Please search based on a client and tick from the list and generate an invoice

Sisters

From: 01-09-2013

To: 26-11-2013

SEARCH

Attention:

- Generate an invoice in a 3rd party accounting system and enter the details below

OR

- Generate an invoice within i-dispatch

Select Invoice Type

Type

Comment

GENERATE INVOICE

☐ External Invoice
☒ Generate Invoice
☒ Invoice
☐ Warranty

Invoice to be paid within 60 days

- o Enter the invoicing details e.g. external, internal, invoice or warranty and generate invoice.


Skills & Certificates

In the instance where you would like to check any skills or certificates listed against your staff and the expiry dates of these documents, we now have the option of producing this information.

- Select the skills-Certificates tab
- Press GET SKILLS –CERTIFICATES LIST
- Select any sorting or filtering criteria required

Data Listed on the Skill & Certificate report: if the item is a skill or certificate, the name of the skill or certificate, the expiry date, the staff name and the staff members role.

GET SKILLS - CERTIFICATES LIST



Drag a column header and drop it here to group by that column

Skill or Certificate	Name	Exp Date	Staff Name	Staff Role
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Skill	Italian	15/07/2015	Catherine Bird	Mobile Staff
Skill	Italian	30/11/2015	test test	Mobile Staff
Skill	Italian	30/11/2015	tester tester	Mobile Staff
Skill	Turkish	31/07/2015	Penny Penny	Mobile Staff
Skill	amr	01/07/2015	Catherine Bird	Mobile Staff
Skill	amr	02/07/2015	test45 test45	Mobile Staff
Skill	amr	08/07/2015	Catherine Bird	Mobile Staff
Skill	Xora	31/07/2015	Mary Mary	Mobile Staff
Certificate	Drivers License	01/07/2015	test45 test45	Mobile Staff

Chapter 8: Dashboard

Select Dashboard from the menu selection on the top right.

The dashboard will provide a summary of what is happening in your business today. It will display some simple measurement matrix to provide transparency and enable maximum business efficiencies.

i-Dispatch

DASHBOARD BETA 1

Dashboard

Staff

Jobs

Schedule

Reports

Clients

Company Details

PHILIPPA DURANT

Logout

Select Date

17-04-2014

SET DATE

Data Refresh Frequency

Every 5 minutes

SET FREQUENCY

Jobs Started On Time

Number of jobs started on time today is 0

Number of Jobs On Today

Number of jobs started today is 7

Num. of Available Staff On Today

Number of available staff count is 5

Clients Served Today

William Street

Queensberry Lodge Care Centre

Queensberry Nursery

Queensberry Sports Club

Interact LTD

United Data Imaging

BS Games

Golden Enterprises Pty Ltd

SEND SMS AND MESSAGE

Need Help - Enter your question here

SEND !!!

Change Map View: All Jobs Today By Current Status

Invoice

	TODAY	WEEK	MONTH
To be provided	1	4	15
Provided	1	1	2

Jobs Outstanding

	0-5 min	5-10 min	10-15 min	15-20 min	20-25 min	25-30 min	30 min-1 h	1 h-2 h	2 h-24 h	24 h-1 day	1 day-12 day	12 day-24 day
	0	0	0	0	0	0	0	2	1	1	0	0

Job Duration Exceptions

	0-5 min	5-10 min	10-15 min	15-20 min	20-25 min	25-30 min	30 min-1 h	1 h-2 h	2 h-24 h	24 h-1 day	1 day-12 day	12 day-24 day
	0	0	0	0	0	0	0	0	0	0	0	0

Parts

	TODAY	WEEK	MONTH
Total Cost	\$145.00	\$990.00	\$1,870.00
Total Sent	\$279.40	\$1,799.20	\$3,718.00
Total owed	\$	\$707	\$1,848

Current Job Status Summary

	Unassigned	Assigned	Accepted	Started	Completed	Closed	Overdue	Unassigned	Reassigned	Cancelled By Administrator	Cancelled By Mobile
	0	2	2	2	0	0	0	1	0	0	0

Staff By Current Status

	Staff Name	Status
	Quentin Sparrow	Available
	Lutz Derting	Available
	Caroline Smith	Available
	Deborah Shi	Available
	Henry Rosemond	On Annual Leave - Till: 30/04/2014 00:00
	Philippa Durant	On Annual Leave - Till: 22/04/2014 00:00
	Paula Barth	Available

SEND MESSAGE

Job Notes

Sender	Message	Date - Time
Caroline Smith	The laptop provided...	17/04/2014 11:41:03

Staff Messages

Sender	Message	Date - Time
Caroline Smith	Stopped on weekends...	17/04/2014 11:39:03
Lutz Derting	Just testing an early...	17/04/2014 11:38:02

On the left hand panel we have:

Select Date

17-04-2014

SET DATE

When opening the dashboard, it will default to today's date. To change the date, click in the date field, select the date on the calendar and press set date.

PLEASE NOTE, when changing the date, some data will not be available and will not revert to the previous date's data.

Data Refresh Frequency

Every 5 minutes

SET FREQUENCY

Data refresh frequency defaults is of every 5 minutes. This means the data on the dashboard will automatically update every 5 minutes. This frequency may be reduced to every 10, 30 or 60 minutes. If you require the dashboard to refresh more frequently, simply select the reload icon next to the address line.

Jobs Started On Time
Number of jobs started on time today is 0

Jobs Started on time will display the number of jobs which started on time today.

Number of Jobs On Today
Number of jobs started today is 6

Number of Jobs on Today, will display the number of jobs started today. This information updates automatically from the job table.

Num. of Available Staff On Today
Number of available staff count is 5

Num. of Available Staff On Today, reflects the number of staff with the status marked available. This information updates automatically from the staff records.

Clients Served Today	
<input checked="" type="checkbox"/>	Woolmers Estate
<input checked="" type="checkbox"/>	Queanbeyan Aged Care Centre
<input type="checkbox"/>	Uniting Care Aging
<input type="button" value="SEND SMS AND MESSAGE"/>	

Clients Served Today, will list clients who have jobs started today. As the status is changed to started they will appear in the list.

You are able to send a SMS message or email to a client or clients from this screen.

1. Tick the boxes of the clients and select SEND SMS AND MESSAGE

I-Dispatch | Dispatching - Google Chrome

test.i-dispatch.com.au/DashboardClientMessage.aspx?cid=113

DASHBOARD CLIENT MESSAGING

Woolmers Estate ☐ Email ☒ SMS

Queanbeyan Aged Care Centre ☐ Email ☐ SMS

Message

Currently we have staff on you site cleaning gutters as requested. Please advise your team.

SEND !

2. If an email address and Mobile number have been provided for the client, they will automatically propagate the fields, if not, of there are different details, over type the fields to enter the correct contact details.
3. Tick if you would like to send the message by SMS or Email or both
4. Type in the message and press SEND

Need Help - Enter your question here

Is there a way I can see which job is outstanding from the dashboard

SEND !!!

Need Help, then enter your question in the box and select SEND. This message will come through to the support team. A member of our support team will then make contact with you, and respond to your query.

On the right hand panel we have:

Current Job Status Summary

	Unassigned	0
	Assigned	0
	Accepted	3
	Started	3
	Completed	0
	Closed	0
	On-Hold	0
	In-Progress	0
	Rescheduled	0
	Cancelled By Administrator	0
	Cancelled By Mobile	0

Current Job Status Summary will display all jobs which are being worked on today, by their current status. To see a job, click on the number displayed, and a list of the jobs will appear.

Staff By Current Status

<input type="checkbox"/>	Quentin Sparrow	Available
<input checked="" type="checkbox"/>	Luca Darling	Available
<input type="checkbox"/>	Catherine Bird	Available
<input type="checkbox"/>	Dorothy Dix	Available
<input type="checkbox"/>	Peony Rosemond	On Annual Leave - Till: 30/04/2014 00:00
<input type="checkbox"/>	Pip Mobile Durante	On Annual Leave - Till: 22/04/2014 00:00
<input type="checkbox"/>	Fiona Bardh	Available

Intellitrac has called to say some tools were left behind. Please collect these before COB today|

SEND MESSAGE

Staff by current status, will display all mobile staff and their current availability. If a mobile worker changes their availability, this will automatically update on the dashboard.

The office is also able to send a message to the mobile staff member from the dashboard.

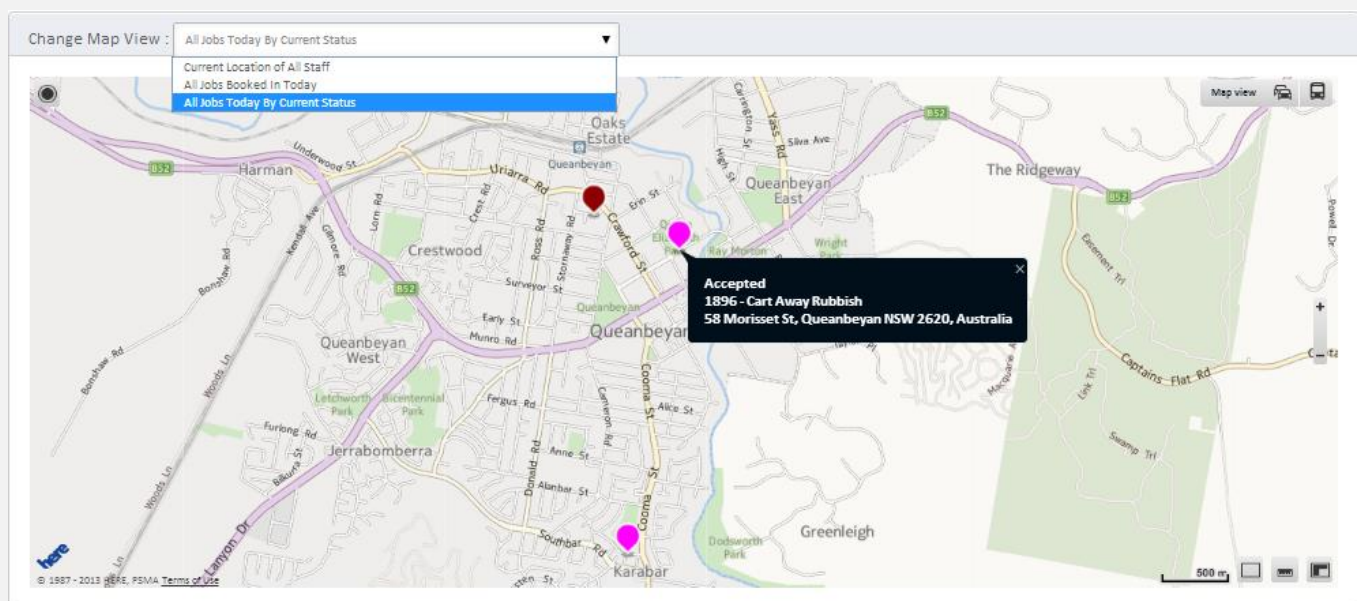
1. Select the employee [s]
2. Type the message into the box provided
3. Select SEND MESSAGE

Job Notes		
Sender	Message	Date - Time
Catherine Bird	The ladder provided ...	17/04/2014 11:41:33

Staff Messages		
Sender	Message	Date - Time
Catherine Bird	Stopped on Midlands ...	17/04/2014 11:39:48
Luca Darling	Just taking an early...	17/04/2014 11:38:21

Job Notes and Staff Messages – any job notes or mobile staff messages, will automatically come through to the dashboard, for the job dispatcher to see.

In the middle panel we have:



Map View – you may view this by current location of all staff, the location of all jobs booked in today, or the current status of all today's jobs.

Clicking on the coloured marker will display details of the job, job time and location. The colours next to each of the job statuses in the summary, match the marker colours on the map, so you are able to identify at a glance, the current status of all jobs.

Invoice			
	TODAY	WEEK	MONTH
To be Invoiced	1	4	15
Invoiced	1	1	2

Invoice displays any jobs completed today and in the last week that have been invoiced or are to be invoiced. This will ensure that you can easily see any jobs which could be invoiced to bring revenue into your business. Click on the numbers to see a list of the jobs which they relate to.

Parts			
	TODAY	WEEK	MONTH
Total Cost	\$165.00	\$990.00	\$2,875.00
Total Sold	\$273.40	\$1,799.20	\$5,716.30
Total Used	9	47	142

Parts will display the units or quantity of parts used today and this week, and the value of these. This will assist with stock control, ordering and invoicing control.

Jobs Outstanding	
0 - 5 min	0
5 min - 15 min	0
15 min - 30 min	0
30 min - 1 h	0
1 h - 2 h	1
2 h - 4 h	1
4 h - 1 day	0
1 day - 2 day	0
2+ day	0

Jobs Outstanding displays the difference between the booked time and actual job start time. For example a job is due to start at 2:00pm and actually starts at 2:10pm. This will appear under

Job Duration Exceptions	
0 - 30 min	0
30 min - 60 min	0
60 min - 120 min	3
120+ min	0

Job Duration Exceptions shows any job which has gone over the duration set in the job details. For example when entering the job in the system it is entered with a duration of 30 minutes to complete the job and the job takes an hour, this job will display in the 30-60 minute area. This will allow the business to be aware of the length of time actually required to complete a job and therefore maximum efficiency in scheduling. Click on the numbers to see a list of the jobs which they relate to.

5-15 minutes. Businesses can then interrogate why jobs are starting late to better manage this. Numbers can be clicked on to see the jobs they pertain to.

Assigning work based on job location.

- You may change the Select date to tomorrow and **SET DATE**
- You may change the map view to All jobs booked in today [which will then represent tomorrow's jobs]
- You may see the current job status summary of tomorrow's jobs.
- ALL OTHER FIELDS WILL CONTINUE TO REFLECT TODAY'S DATA

The screenshot shows a web interface for job scheduling. On the left, there's a 'Select Date' section with a date field showing '17-02-2015' and a 'SET DATE' button. Below it is a 'Data Refresh Frequency' section with a dropdown set to 'Every 5 minutes' and a 'SET FREQUENCY' button. Further down are sections for 'Jobs Started On Time' (showing 'No Data Available') and 'Number of Jobs On Today'. In the center is a map of Canberra with several blue location pins. Above the map is a 'Change Map View' dropdown menu currently set to 'All Jobs Booked in Today'. On the right, there's a 'Current Job Status Summary' table and a 'Staff By Current Status' table.

Status	Count
Unassigned	1
Assigned	5
Accepted	0
Started	0
Completed	0
Closed	0
On-Hold	0
In-Progress	0
Rescheduled	0
Cancelled By Administrator	0
Cancelled By Mobile	0

Staff Member	Status
Quentin Bird	Available
Lucas Darling	Sick Leave
Annie Spencer	Available
Daffy Duck	Available
Ed Parkes	Available

- **Assign unassigned jobs.** When reviewing tomorrow's jobs, you may
 - Click on the number of to the right of **Unassigned** jobs, under Current Job Status Summary and see the summary detail of any jobs.
 - Click the drop down arrow at the end of the staff field, to allocate a staff member.

