Citrus Dispatcher

User's Manual

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Table of Contents

Overview

Citrus Dispatcher is designed for those companies who typically receive Requests for Service from customers and schedule technicians to respond.

Citrus Dispatcher is a date and time oriented program.
When a customer calls for service, an electronic service slip is created for a specific date and time. Estimated time required to complete the service slip is entered in hours and the service slip is assigned to a technician.

The electronic service slip drives subsequent procedures.
Work Schedules are printed at any time based on service slips.
Service slips can be rescheduled up to end of the day on which the slip is scheduled.
The day a slip expires, it must be accounted for by entering completion data.

Additional procedures are:

- Schedule a customer meeting
- Reschedule a service slip
- Create and Schedule recurring events
- Store a Service Slip and Schedule at a later time
- Print work schedules
- Print a simple service invoice
- Place reminder phone calls
- Create a Work Order
- Create a Service Contract
- Block time for Vacation and Holidays

The Setup Screen

The *Setup Screen* is where you enter the information needed for the basic operation of the program.
It contains a File Folder with eight tabs; one is a *Help* tab that contains brief instructions about the other tabs.

Business Info
Enter the Information about your Business.

Assignments
Create a list to which *Service Events* will be assigned.

Problem Descriptions
Create a list of common reasons your customers call for service.

Operations has four sub tabs**.**

Printing Tab – Select to print in color or black only.
Select Print Font and Invoice Style.

Scheduling Tab – Select the invoice number scheme here.

Work Days Tab – block scheduling from off days and select start time

Phone Connection Tab – enter modem data and select whether or not to use Program Assistance Features

Repair Invoices and Service Order/Invoice Tabs – You can create a list of items that will automatically print on *Repair Invoices*.

.Logo Tab
Select and load a logo here.

The Main Menu Screen

The Main Menu Screen has **four groups** of like sub-routines.
At the top of the screen are the **Menu Selections**, explained later.

Service Slip Routines

Create a Service Slip
This routine creates an electronic service slip by selecting a customer from your customer list, selecting a date, time duration and assigning the slip to a technician.

Schedule Stored Slips
When creating a slip (above) you can opt not to schedule the slip initially.
Slips are saved and can be scheduled later.

Schedule Recurring Events
Events that occur repeatedly can be scheduled in a group at one time.
Events can be customer related or not and can require invoicing or not.

Reschedule Slips
Service slips can be rescheduled up to the end of the day on which the work is to be performed

Print Routines

Daily Work Schedules
A simple work schedule per technician (assignment) can be printed at any time.

Repair Invoices
If you do not require complex Repair Invoices, this routine can be used to print a simple invoice with a tear off section detailing completion information to be used by the office.

Create a Work Order
Produce a set of documents you can give to installers, etc detailing the needs of a job.
Services and Sales Items can be added to the Work Order.
This is not a Customer Document.

Create a Service Contract
A Service contract contains a service to render, a set price, starting date and duration.
You save the document and can modify or print it using a Word Program.

Phone Routines

Set Unattended Monitoring
If your modem has voice capability and you subscribe to Caller ID services, you can record data about phone calls while away from the office.

Place Courtesy Calls
Select a date, and a grid is populated with events for that date.
The phone dialer screen is then presented and you can call accounts and remind then of the upcoming service.

Other Routines

Schedule Vacation and Holiday Time
Reserving days in advance prevents inadvertent scheduling of Service Attentions on Holidays or Vacation Days.

View Account History
Service History is generated as you enter Service Completion Data. This information can be viewed and printed via this routine.

The Menu Selections

The Main Menu Screen contains drop down menus:

Files - displays a drop down menu with the following sub menus:
Create/Modify
Information needed about your Business and the way you do business is entered and can be modified by selecting this menu.
.
Exit
Exit ends the program.

Order Forms – an Internet link to companies that supply the forms needed for Citrusware Programs.

Getting Started

Setting up the Program's Basic Files

When the program is first run, some information does not exist, unless you have
previously installed a different Citrusware Program.
(Programs share common information).

The *Setup Screen* will automatically display. You can also display it at any time to
modify existing information by selecting *Files* from the Startup Menu Bar, and then
Create/Modify from the Drop down Menu.
(Clicking on our Logo advances the Tab Selection)

Business Info
Enter the Information about your Business.
Select the Type of address scheme to use (USA or International)
 If you use a USA Style address, you must enter a zip code.
The Pencil image reloads your data from a previously saved file.
The Eraser image clears all Business Data Boxes so you can re-enter if needed.

Assignments
Create up to 30 Assignments.
We recommend you use generic terms rather than names.
It is best to refer to a service area such as City Route #1, Rural Route #2, etc.
Assignments are common to other Citrusware Dispatching Programs and may appear
automatically.
Adding or deleting Assignments will affect other dispatching programs.
We suggest you create one more assignment than you think you need.
Type an assignment name into the upper portion of the box and click *Add.*
To modify an existing assignment, click on it in the grid, it loads to the upper portion of
the box. Make Changes and click *Change*.

Problem Descriptions
Create a list of reasons customers call for service. These items will appear in a drop down
list when creating a service slip. The rules for this tab are the same as the Assignments
tab.

Operations has four sub tabs**.**

Printing Tab – Documents can be printed in black or color.
Set the *Print in Color* checkbox to print in color.
Select a color for frames and a color for most text.
(The color of some text is pre-selected, such as amounts).
Select a print font if you wish. Font sizes are fixed.
Select the style of Repair Invoices you wish to print.
This setting toggles the Repair Invoices and Service Order Invoices tabs.

Scheduling Tab – Service slips can be a sequential number or generated from the date recorded followed by a unique sequential number.

Work Days Tab - has two settings
> **Allow Scheduling These Days** – Select the Workdays you wish to schedule service events.
> This should be your normal workweek.
> **Start Time** – Select the time your technicians typically start a work day.

Phone Connection Tab – You can use your Computers Modem to dial customers from a number of places within the program. Connect a telephone off of your modem card. Tick the *A Phone is Connected* checkbox.
 The *Com Port #* Box is loaded automatically and displays the port where your modem is connected.

> Program Assistance **–** Circumstances may arise where the program needs your attention.
> Set the Alarms option to sound the system alarm when attention is needed.
> Set the Show Prompts to display a helpful message when attention is need.
> There are times when the alarm will sound or a message will display even if the option is turned off.

Repair Invoices and Service Order/Invoice Tabs – You can create a list of items that will automatically print on *Repair Invoices*.
If other Citrusware programs are installed, the items grid for Service Order/Invoice may be automatically populated.

Logo Tab
 Your Logo consists of two files; the actual Logo image file which you provide, and a Logo description file the program creates.
It is important you copy your logo image file to your Citrusware Folder BEFORE selecting it.
Location: Hard Drive (usually C) : /Program Files/Citrusware
The program creates the Logo description file and locates it where the Logo image file resides.
If you were to select an image from a removable disc or a system disc which might not be available at all times, the program can not find it and an error will occur.

When all data is to your satisfaction, Click *Save Changes / Return to the Menu* button.

Creating Customer Accounts

Once you have created the Setup files, you can begin to enter Customer Account Data. Select **Create a Service Slip** from the main menu (even though a slip will not be created). The Customer Main Screen is displayed.

You will be instructed that your Customer File is empty. If Citrusware's *Citrus Contract Scheduling* program is found, you can not create customer records with *Citrus Dispatcher*. You must use *Citrus Contract Scheduling*.

NOTE: Customer records are stored in a file named CustomerData.txt.
It is a **structured text file**, which means each element within the record has a fixed length.
You can view it using any Text Editor such as Notepad, **but do not alter the contents**.

Make changes to customer records only while viewing it from within the program.

Creating Customer Records
To create a new customer, click *Files* then *Add a New Customer*. The Data fields will be cleared.
If you change your mind, click *Cancel Add* and the Add routine will be exited.

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

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

Customers appear in the order in which they were created.
The *Name List* however, is alphabetical.

Modifying a Customer Record
Simply type over the data you wish to modify. Any subsequent action will save the customer record. (Positioning to another record, exiting the Customer Screen, etc.)

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

Locating Customer Records
You can **navigate** through the customer file:
- **<<** returns to the first customer record
- **<** steps back one Customer from the current record
- **>** steps ahead one Customer from the current record
- **>>** steps to the last Customer in the file

You can **Search** for a Customer by clicking the *Search by Criteria* Button.
The Customer Search Screen is displayed.
Select a *Search Criteria* example - Street Address.
Enter *Search Data* example – Main St
Click Search

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

You broaden your search by decreasing the search data.
Main will produce Main St, W Main St, Main Ave, Mainland St, etc
You lessen your search by increasing the search data.
123 Main St will produce only 123 Main St

Note the difference between *by Last Name* and *by Business Name*.
Last Name finds individuals, B*usiness Name* finds businesses.

Searching is not case sensitive, in other words, if you enter *Smith*, all customer records with Smith or smith in the name field will be found (including Blacksmith, Smithson, etc).
Once you have selected the *Search Criteria* and entered the search data, click **Search**.
Click on the customer that you wish to select and the customer record will be loaded to the customer screen.
If only one customer record meets the search criteria then it loads automatically.
If no record is found, you can create a new record at this time.

You can select a customer by clicking "the *from Name List* button.
Clicking *from Name List* displays a dropdown list on top of the *Name* box.
This list contains all of your customers and is alphabetically sorted.
You can click the arrow on the right side and the list drops down to display all of your customers.
You can scroll through the list to find a customer and click on it to load it.

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

The *from Name List* button is a toggle button. Clicking it again will hide the Customer Select List.

Customer Auxiliary Data

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

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

The data, however, can differ for each account.

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

As you select or create new accounts, you can enter Auxiliary Data.
The Clear buttons clear the data box to the left for the current account.

The *RETAIN Aux Data between Accounts* checkbox allows for data to pass from one account to the next.
Use this when setting up Aux Data if fields are similar with all accounts.

Schedule Vacation and Holiday Time

Select **Schedule Vacation and Holiday Time** from the main menu
The **Holiday and Vacation Days Screen** is displayed.

From this screen you can reserve days for individual teams or All Teams.
Reserving days in advance prevents inadvertent scheduling of Service Attentions on
Holidays or Vacation Days.

Select the *Reserve Days* Action button.
Click on the 1st day to reserve in the calendar.
Click on an individual team assignment or reserve all assignments at the same time.
Then click the Days Slider until the number of Work Days that you wish to reserve is
displayed. (Alternatively, click inside the box to increase the day count).
Select a Reason from the drop down list.
Click Accept.
Work Days from the Calendar Date Selected, for the number of days selected, will be
labeled with the Reason selected and made unavailable for assigning Service Slips.

Unblocking Days

Select the *Unblock Days* Action button.

Follow the same procedure above.

Using Citrus Dispatcher

Creating an Electronic Service Slip

Select *Create a Service Slip* from the main menu screen.
The Customer Screen will be displayed, select the customer or create a new customer record. (See *Creating Customer Accounts* in the **Getting Started** Section for more details).
Once the Customer is selected, click the *Pencil* image to continue.

The *Scheduling Screen* is displayed.
The scheduling screen has a *Window Menu* with sub menus for use when creating and scheduling the service slip.

- *Team Month Window* – Shows the current Month data for the currently selected team (assignment). The day number is replaced by the hours for day that are already scheduled. Use the arrow buttons to step between teams (assignments).
- *Customer Window* – displays the current account data; it cannot be altered from this screen.
- *Memo Window* – Displays the current Invoice Memo which will print on all memos. Data can be entered, modified or deleted via this window.
- The *Invoice Style and Invoices* windows are not used in this procedure.

Under the Window Menu are two boxes; containing all assignments and all problem descriptions created during **Setup**.

Select an **assignment** from the 1st drop down box.
Select the Problem as described by the Customer from the 2nd box, or enter your own. (The problem can be added to the drop down box at this time).
Select a **date** in the calendar.
As you change **dates** and **assignments**, the *Hours Grid* updates to the current date and assignment. *Hour Slots* that display **No Event Scheduled** are considered **Open**.
Select the number of hours you wish to assign to this Service Slip from the *Time Selection Box.*

A service slip can be created and scheduled or created and saved for later scheduling.

Create and Schedule
Click on an **Open** *Time Slot* in the *Hours Grid.*
The existing events for the day are evaluated and if the service slip will fit, and there is enough time remaining for the day, the slip will be approved. The slip number and customer name will be entered into the *Hours Grid.*
Click **Schedule** and the *Confirmation Screen* will appear.
A Service Attention (SA) number is generated at this time. This can be conveyed to the Customer for later reference.

Create and Save
The *Create an Unscheduled Slip* checkbox allows a slip to be created without being scheduled. This **MUST** be checked **BEFORE** clicking the Schedule button.
Check the box and click **Schedule**. The service slip is stored and can be scheduled later.

The *Cancel* button cancels the scheduling process and removes the entry in the *Hours Grid*.

The *Store Text Msg* button places the service slip information onto the system clip board (Copy) where it can be retrieved and entered into a text massage program's text box (paste).

The *Toggle View* button displays the day/Assignment data in a grid detailing by hour. If a time slot is populated, the customer can be auto-dialed by clicking the time heading (e.g. 9:00)

Schedule Stored Service Slips

If during the Service Attention scheduling procedure, you chose to save the Service Slip and schedule it at a later time, this option button will be enabled.

When selected, a grid containing all stored slips is displayed.
Select the slip that you wish to schedule.
The slip data is entered into the appropriate boxes on the Scheduling Screen, and the Scheduling screen is displayed.

Proceed as you would with any Service Attention scheduling.
FYI- If you do not complete the scheduling procedure, the slip is not removed from the unscheduled slip list and can still be scheduled at a later time.

Schedule Recurring Events

A recurring event can be customer related or not. If customer related, it can require an invoice or not.
Examples of each might be:
- Non-customer Related – Restock repair vehicles every other Friday at 3:00pm
- Customer Related Invoiced – Clean Swimming pool Tuesdays at 9:00
- Customer Related non-invoiced – place a courteously call last day of each month

First, select the event type as above. If customer related, select the customer from your customer list.
Regardless of the event type, it must be related to an assignment. Select the assignment from the drop down list.
Select the time of day the event should occur from the *Event Start Time* Box.
Click the Arrows in the *Time Required Box* until the amount of time needed for the event is shown.
(The hours entered is compared to the event start time. If required time exceeds the end of the day, a message is displayed).
Click the Show Calendar or Toggle Calendar menu to display the calendar.
Click each calendar date on which this event should be performed.
Click Schedule when the list is correct. The daily schedules for the selected assignment will be scheduled and the time(s) reserved.

Rescheduling or Deleting a Service Slip

Select *Reschedule a Slip(s)* from the main menu screen.
The Service Slip *Summary Screen* is displayed.

You have three options for Searching for a Service Record.
- Search through all records from the earliest created to the most recent.
- Enter the SA number which was assigned when the Service Slip was created.
  This will result in only one unique Attention being located.
- Enter the Customers Telephone Number.
  If a Customer has multiple Service Attentions scheduled, this will only locate the first Attention.

Once you have selected a Search method, click the Search button.
If a Record meeting the Search criteria is found, the Record Information is displayed on the right portion of the screen.
The information cannot be modified from this screen.

NOTE:
All records are searched, but only active (Scheduled but not completed) Records can be deleted.

If the record is active, the Delete and Reschedule Buttons are displayed.
Press Delete and Confirm the Deletion.
If the record is active, the Delete and Reschedule Buttons are displayed.
Press Reschedule and confirm Rescheduling.
At this point, the schedule for the Service Attention is Deleted as above, the Customer information, Problem description, and Team Assignment information is not.
The "**Schedule Service Attention Screen**" is displayed; the *Saved* information is filled on the Screen.
Continue to Schedule (Reschedule) the Service Attention.

Viewing and Printing Work Schedules

Select *Daily Work Schedules* from the main menu.
The "**Print Setup Screen**" is displayed.
From this screen, you can select a date and Team assignment.
If you select All Teams, then "Yes" from the input box, work schedules for all teams for the selected date will be printed. You cannot view All Teams simultaneously.
The "Events by Hour" displays the day schedule for the selected team and date.
No changes to the schedule can be made on this screen.
Click Toggle View to switch between the "Events by Hour" and an expanded more detailed view, including Customer Information.
Click *Print* to print a single team assignment.

Printing Service Invoices

Select *Service Invoices* from the main menu.
The *Print Invoices Screen* is displayed.
For best results, use perforated response paper to create Service Invoices.
(See Menu Selection **Order Forms** on the **Main Menu**).
From the *Print Invoices Screen*, you can select a date and Team assignment.
The Events Grid displays events for the selected team on the selected date.
If Service Attentions are scheduled, the Print Button is enabled.
Click Print to print Service Attention Invoices for the selected team and date.

The menu displays a selection called *Invoices*.
You can print blank invoices by selecting this menu item.
Enter the number of blank invoices that you wish to print, then click Print.

Although you selected the Invoice type you will generally use on the Setup Screen, you can select different one of the three types for this invoice.
(All are listed in a box on the lower left).

You can add a memo to all invoices. Select Toggle Memo from the Windows Menu.
The Add Memo Window opens in the lower left corner of the screen. Enter a memo in the text box and save it.
Check the box, *Add Memo to Current Invoice* to print the memo on the invoices selected.

If you want the reported Problem to print on the Invoices, check the box entitled *Print Problem Reported on Invoice*.
Click *Print* to print service invoices for the selected team assignment and date.

Creating a Pick List

A pick list is a list of items needed for a Service Request. Select Create A Picklist from the main menu. Select a date and then the Service Request for which you need a list of items. Select the items and enter the quantities need. Print the Pick List

Use the Manage Inventory Items Routine to add items, add quantities, etc.

Create a Work Order

Select Print a Work Order from the main menu.
FYI- a Work Order is a document for your Service Personnel, not a customer document.

Select a Customer from your Customer List.
Click the *Pencil Image*.
The *Work Order Creation Window* is opened.
If you have previously created a Work Order Template, it will be loaded into the Work Order Narrative Box.
If not, you can create a Narrative and save it for use with future Work Orders.
If the loaded Narrative is not suitable, you can clear the box and type a new narrative.

Select a Heading from the drop down Heading Box.
Choices are Work Order, Service Order or Repair Order.
(You can enter something else, but keep it short so that it fits when printed).

If you wish to print a Completion Summary Report at this time, set the checkbox, *Print Completion Summary Report* to on.
A Completion Summary Report is a separate document that can be used by the Servicing Personnel to state any anomalies found and any tasks that could not be completed.

Click Print WO when the Work Order is prepared.

Create a Service Contract

Select a Customer from your Customer List.
Click the *Pencil Image*.
The *Contract Creation Form* is opened.
Follow the instructions on the left side of the window.

NOTE: The Billing Frequency will the same as the Account Billing Frequency unless Per Service Event is selected, then the display defaults to Monthly.)

Phone Routines

Unattended Call Monitoring - Select this button to monitor incoming telephone calls while the office is unattended.

NOTE: SOME UPS UNITS CAN CAUSE DIALING ERRORS FROM ANYWHERE WITHIN THE PROGRAM.
If you receive an 8005 error, port already open, shut off your UPS monitoring software while dialing from within the application.

Place Reminder Calls – use this routine to select future dates and remind your customers that a service attention is scheduled.

Other Routines

Schedule Vacation and Holiday Time

You can block days to prevent service scheduling. See this topic on page 16

Schedule Customer Meeting

The process of scheduling a customer meeting is identical to scheduling a Service Attention with the exception that the event is not tracked.
Select the assignment that should attend the meeting.
(If multiple assignments need to attend, each must be scheduled separately).
The meeting can be deleted or rescheduled.

View Service History

With Citrus Dispatcher, you can view Service History directly from this menu selection.

The History Screen displays a single account or all accounts.
You can select a date range, Current Month, Previous Month, Year to Date, or eternity.
Click Load Grid.
The history for an account or all accounts can be deleted by the selected date range