


Dispatch Board Side Panel

It's in the Cards

With our June 2021 release, exciting changes are coming to the Dispatch Board. From the new side panel, you can readily access more Work Order info than ever before.

Customer Card

See customer addresses and primary contact information, in addition to links for opening the customer record, viewing history, and seeing any open QuickBooks balance. Click the Details icon  at the top right of the card to see secondary contacts and other related information.

CUSTOMER

Fort, Peggy

PRIMARY CONTACT

(555) 693-4831

p.fort@newmail.net

GO TO CUSTOMER

VIEW HISTORY

VIEW BALANCES

CUSTOMER

Fort, Peggy

ADDRESS

1904 Southwest 27th Terrace
Cape Coral, FL 33914

PRIMARY CONTACT

(555) 693-4831

p.fort@newmail.net

OTHER CONTACTS


(555) 123-4567

GO TO CUSTOMER

VIEW HISTORY

VIEW BALANCES

Work Order Card

View pertinent Work Order details such as primary tech and priority, along with links to open the Work Order and to filter Assignments. Click the Details icon  at the top right of the card to see Tags and a list of all assignments.

Work Order

TASK

AC - Not Cooling - FM

PRIMARY TECH

2 Alex M.

PRIORITY

Normal

GO TO WORK ORDER


UNASSIGN ALL

Tags

Assignment List

DATE	TIME	TECH
06/14/2021	11:15 AM	2 Alex M.

Assignment Card

Check details of the selected assignment, including the scheduled date/time and the duration. Click the Edit icon  to adjust the assignment's scheduled tech, date, time and duration.

Assignment

TASK

AC - Not Cooling - FM

PROMISED APPT

06/14/2021 11:00 AM - 2:00 PM

ASSIGNED TECH

2 Alex M.

SCHEDULED DATE

06/14/2021

SCHEDULED TIME

11:15 AM

DURATION

1.00 hrs

UNASSIGN

FILTER ASSIGNMENTS

Assignment

TASK

AC - Not Cooling - FM

PROMISED APPT

06/14/2021 11:00 AM - 2:00 PM

ASSIGNED TECH

2 Alex M.

SCHEDULED DATE

06/14/2021

SCHEDULED TIME

11:15 AM


DURATION

1.00

CANCEL

SAVE

Notes Card

Reference pinned notes and recent timeline notes for the Work Order. Click the Edit icon  to edit the notes.

Notes

CUSTOMER PINNED NOTE

Gate Code 1234 - Don't let the dog out

WORK ORDER TIMELINE NOTES

ALLI H. 06/13/2021 4:37 PM
Replaced capacitor, unit working as normal.
LAST MODIFIED BY BEN H. ON 06/13/2021 3:24 PM
A/C not working. Thermostat set to 75, inside temp 84

ADD NOTE

GO TO TIMELINE

Notes

Click a note to edit it.

CUSTOMER PINNED NOTE

Gate Code 1234 - Don't let the dog out

WORK ORDER TIMELINE NOTES


ALLI H. 06/13/2021 9:37 PM
Replaced capacitor, unit working as normal.
LAST MODIFIED BY BEN H. ON 06/13/2021 9:24 PM
A/C not working. Thermostat set to 75, inside temp 84

ADD NOTE

CANCEL

SAVE

Reminder Card

Review reminders for this Work Order. Click the Details icon  at the top right of this card to show the details for each reminder, along with quick links to dismiss, edit, or mark a reminder as Complete.

Reminders

1 PENDING

NEW REMINDER

Reminders

1 PENDING

Work Order Reminder

06/17/2021

CUSTOMER

Fort, Peggy
(555) 693-4831

ASSIGNED TO


Alli H.

Follow up with Peggy about the Quote

Created by: Ben H. • 06/14/2021
Last edited by: Ben H. • 06/14/2021 • 7:48 AM

NEW REMINDER

Part Request Card

See any active Part Requests for this Work Order. From here, you can also show the items on your Part Requests and change the status using the status dropdown, and even click into the Details  to see more.

Part Requests

1 PENDING

GO TO PART REQUESTS

Part Requests

1 PENDING

NUMBER

1145

VENDOR

Grainger

REQUESTED DELIVERY

06/15/2021

STATUS

REQUESTED

SHOW ITEMS

GO TO PART REQUESTS

Invoice Card

View relevant Invoice information including billing information, invoice date and remaining balance, or view the invoice to drill down further.

Invoice 11218

BILL TO

Peggy Fort

ADDRESS

1904 Southwest 27th Terrace
Cape Coral, FL 33914

INVOICE DATE

06/14/2021

DUE DATE

07/13/2021

INVOICE TOTAL

\$490.99

BALANCE DUE

\$490.99

GO TO INVOICE

Quote Card

Access Quote totals, relevant dates and the Quote status, or view the Quote to drill down further.

Quote Q1185

PENDING

BILL TO

Peggy Fort

ADDRESS

1904 Southwest 27th Terrace
Cape Coral, FL 33914

QUOTE DATE

06/14/2021

EXPIRATION DATE

07/13/2021

QUOTE TOTAL

\$5,080.16

GO TO QUOTE