

## PRODUCT FACT SHEET

# Graphical Schedule Board

Efficiently routing your service team allows you to maximize profitability while delivering improved customer service, but maintaining schedules for multiple technicians can be a daunting task. The latest version of the WennSoft Graphical Schedule Board allows your dispatchers to easily sort, filter and schedule appointments using a visual representation of scheduled service; including assigned, unassigned and un-scheduled appointments.

### Functionality

- **Service Appointment Update** – Modify the appointment (date, start time, duration, Technician ID or appointment status) from the details window by double-clicking the assigned, unassigned or unscheduled appointment record or using the select button in the context menu.
- **Technician Paging** – User can generate an email or an alphanumeric page containing a single appointment using the context menu item.
- **Technician Broadcasting** - User can broadcast a call to a technician's mobile device using the context menu item.
- **Appointment Allocations** – User can remove the appointment allocation from a single appointment or all appointments for a technician. The appointment(s) will be reassigned to the unassigned technician and status set to a user-defined status value.
- **Technician Activities Update** – Modify the date, start time, activity type or duration of an existing technician activity.
- **Update Job Activities Update** – Modify the date, start time, job number, cost code or duration of an existing job activity.

## View

- Service calls are represented by color-coded bars. User-defined settings allow you to select the background color of an appointment based on call type, problem type or service area and appointment status. Filter the display by
  - ◇ Technician
  - ◇ Technician service area
  - ◇ Call status
  - ◇ Location
  - ◇ Call priority
  - ◇ Customer
- Further filter the display to view one or all affiliates, regions or branches at a time.
- Unassigned and unscheduled elements appear in a separate display area. Drag and drop functionality allows the user to convert an appointment from unassigned or unscheduled to scheduled or to drag and drop the appointment to a new date or technician.
- View all of the following in one window: service appointments, technician activities and job activities.
- Display one-, three- or five-day views for the selected technician, vendor or staff. The user can change the view by adding or subtracting days, up to a maximum of 90 days.
- View all of the data defined for the appointment bar by hovering over the appointment.

## User-Defined Configuration

- WennSoft Service Management scheduling constraints and validation rules are automatically enforced.
- Attributes including data caching, auto-save, color coding and major/minor time scale for each view can be configured, allowing you to create a customized view specific to your needs.
- General and preference setups are divided into items that are configured globally for all users and those that can be customized by user.
- Appointment changes can be cached, allowing users to accumulate appointment changes prior to saving and committing to the database.
- When using the cached approach, the database status indicator displays one of three states; no change in the database or GSB, change in GSB but not the database or change in the database but not GSB. Reload will reset the database state indicator to the default state.
- Auto-Refresh – Define intervals to automate auto-refresh, which repopulates GSB so that appointments created and/or edited by other users are displayed.

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- Auto-Save – Define intervals for automatic saving of cached changes or prompt users to save cached changes. You may suppress the auto-save feature.
- Auto-Reload – Clear all unsaved/cached changes and repopulate GSB with all appointments.
- Technician Over-Allocation – Change the background color of the technician name block to red when a technician is over-allocated (assigned more work hours than his/her shift hours plus allowed overtime hours). This feature is available with our Premier platform only.
- Service Appointment, Technician Activity and Job Activity Bar Data – Choose the data that displays on the appointment bar. This data can come from Appointment, Customer, Location, Service Call, etc.
- Define standard work hours and days of the week to be displayed in the appointment scheduling grid.

### Reporting

- One-, five- and seven-day or monthly schedules-at-a-glance can be printed.
- Users can print a schedule of appointments, technician activities or job appointments by technician or vendor.

### Configuration / Implementation Requirements

- The GSB application will be locally installed as a stand-alone application for each dispatcher.
- GSB requires the user to select one or more valid companies (Microsoft® SQL™ Server databases) from the Microsoft Dynamics™ GP company table.
- The GSB installation will create tables in each company for which it's installed. These tables will be used to house the setup parameters as defined by the initial setup of the application. These tables will also store user-specific preference settings.
- The GSB installation will install Web Services on the web server indicated by the installing user.
- Each GSB user must also be a WennSoft Service Management Series user as that user profile will determine the data each dispatcher can access.



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