

QuikOne FSM

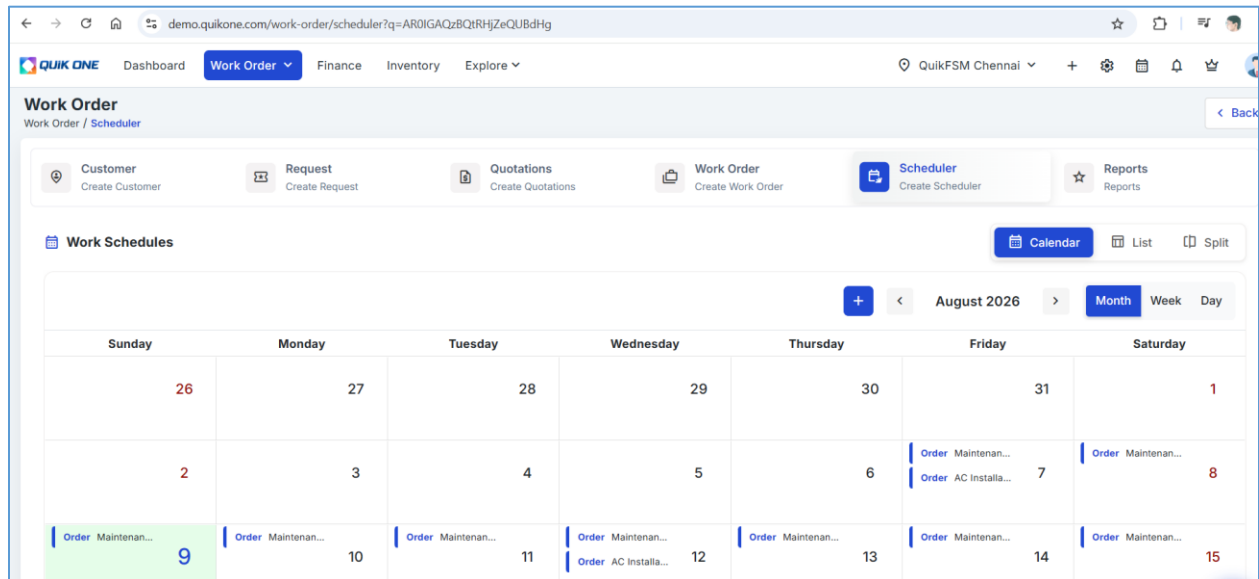
User Guide – Scheduling & Dispatch

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9. Scheduling & Dispatch

9.1 Calendar View



The Calendar View provides a visual representation of all scheduled work orders and service appointments. It enables dispatchers and service coordinators to monitor workloads, identify scheduling conflicts, and efficiently manage technician assignments across different time periods.

The scheduler supports multiple viewing modes, allowing users to analyze schedules by Month, Week, or Day.

Navigation

Work Order → Scheduler → Calendar View

Calendar Views

The scheduler provides the following viewing options:

Month View

Displays all scheduled work orders for the selected month.

Features include:

- Monthly calendar layout.
- Scheduled work orders displayed against each date.
- Multiple schedules visible on the same day.
- Easy identification of busy and available dates.
- Quick navigation to previous or next months.

The Month View is ideal for long-term planning and workload balancing.

Week View

Displays all work orders scheduled for a seven-day period.

Users can:

- View technician workload for the week.
- Monitor upcoming appointments.
- Identify scheduling conflicts.
- Plan technician availability more effectively.

Day View

Displays all work orders scheduled for a single day.

This view helps dispatchers:

- Monitor daily technician assignments.
- Review appointment timings.
- Manage urgent or same-day service requests.
- Optimize daily schedules.

Create a New Schedule

Click the **(+)** button to create a new work schedule directly from the calendar.

The system opens the **Create Scheduler** screen where users can define:

- Work Order
- Schedule Date

- Start Time
- End Time
- Technician
- Service Details
- Customer Location

Calendar Navigation

Users can navigate through the calendar using the available controls.

Functions include:

- Previous Month/Week/Day
- Next Month/Week/Day
- Current Month Display
- Quick switching between Month, Week, and Day views

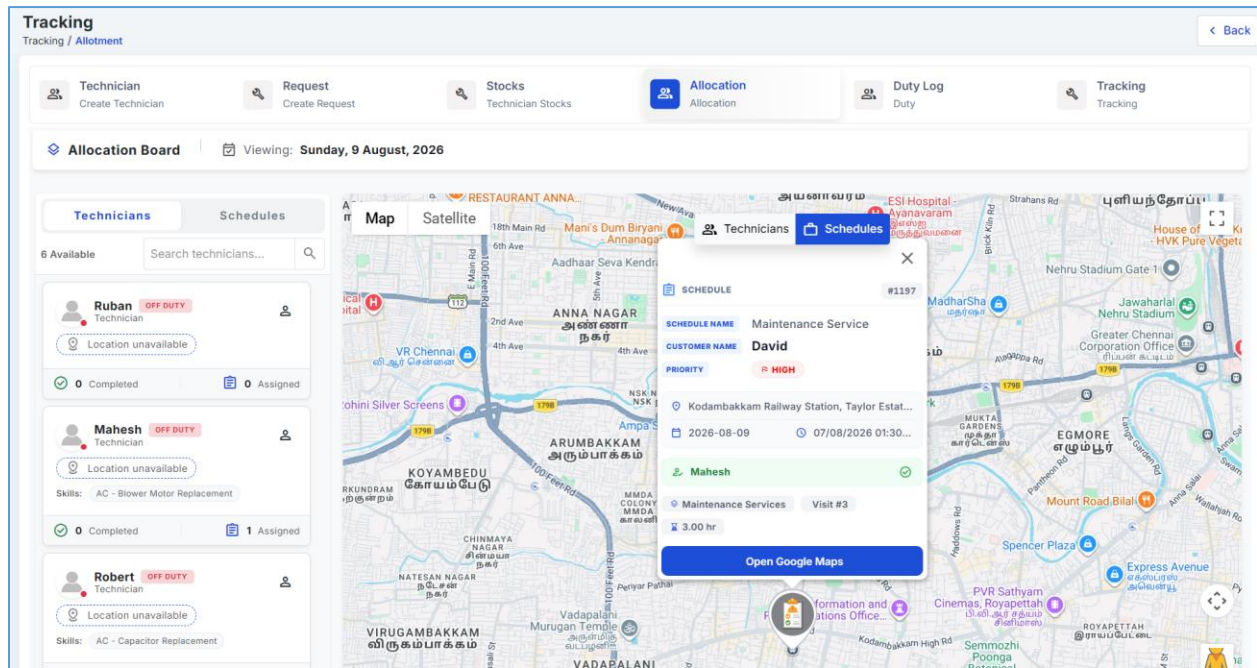
Schedule Display

Each scheduled work order displayed in the calendar includes information such as:

- Work Order reference
- Service description
- Scheduled date
- Appointment time
- Assigned technician (where applicable)

Selecting a scheduled item opens the corresponding scheduler or work order for viewing or editing.

9.2 Drag & Drop Scheduling



The Drag & Drop Scheduling feature enables dispatchers to assign, reassign, and manage technician schedules directly from the Allocation Board. It provides a visual planning interface that simplifies technician allocation based on availability, skills, and job location.

Navigation

Tracking → Allocation

Overview

The Allocation Board displays:

- Available technicians
- Technician availability status
- Assigned schedules
- Interactive map view
- Customer job locations
- Schedule details

Schedulers can allocate work orders using a simple drag-and-drop interface, reducing manual scheduling effort and improving dispatch efficiency.

Technician Panel

The left panel displays all available technicians along with key information:

- Technician Name
- Duty Status (On Duty / Off Duty)
- Current Location (if available)
- Skills and Certifications
- Number of Assigned Jobs
- Number of Completed Jobs

Users can search technicians using the search box.

Map View

The interactive map displays:

- Technician locations
- Customer locations
- Scheduled work orders
- Route information
- Nearby technicians

Users can switch between:

- Map View
- Satellite View

Schedule View

Selecting a schedule displays detailed information including:

- Schedule Number
- Schedule Name
- Customer Name

- Priority
- Job Location
- Scheduled Date
- Scheduled Time
- Assigned Technician
- Service Category
- Visit Number
- Estimated Duration

Users can also open the customer location directly in **Google Maps** for navigation.

Drag & Drop Scheduling

Schedulers can assign or reassign work orders by dragging a schedule and dropping it onto another technician.

The system automatically updates:

- Assigned Technician
- Allocation Board
- Technician Schedule
- Work Order Assignment
- Dispatch Information

This allows rapid workload balancing without opening the work order.

Technician Allocation

The Allocation Board helps dispatchers assign technicians based on:

- Availability
- Current workload
- Technician skills
- Customer location
- Distance from job site
- Priority of the work order

9.3 Technician Availability

The **Technician Availability** feature provides real-time visibility into the status and workload of field technicians. It enables dispatchers to identify available resources, monitor technician activity, and assign work orders efficiently.

Navigation

Tracking → Allocation → Technicians

Overview

The Technician Availability panel displays all registered technicians along with their current duty status, workload, skills, and availability. This allows dispatchers to quickly identify the most suitable technician for a work order.

Technician Information

Each technician card displays the following information:

- Technician Name
- Profile Picture
- Duty Status (On Duty / Off Duty)
- Current Location (if available)
- Assigned Skills
- Number of Completed Jobs
- Number of Assigned Jobs

Duty Status

The system displays the current availability of each technician using duty status indicators.

Status	Description
On Duty	Technician is available to receive and execute work orders.

Off Duty	Technician is currently unavailable for work assignment.
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Workload Overview

For each technician, the system displays:

- Total Assigned Work Orders
- Total Completed Work Orders
- Current Active Schedule
- Pending Assignments

This helps dispatchers balance workload across the workforce.

Skill-Based Availability

Technicians are tagged with their respective skills and certifications, enabling dispatchers to assign jobs based on expertise.

Example skills include:

- AC Installation
- Plumbing
- Electrical Repair
- Pest Control
- Customer Communication
- Welding
- Machine Repair

Search and Filter

Dispatchers can quickly locate technicians using the search functionality.

Technicians can be filtered based on:

- Technician Name
- Skills
- Availability Status

- Assigned Workload

Location Awareness

When location services are enabled, the system displays the technician's current location on the map.

This helps dispatchers:

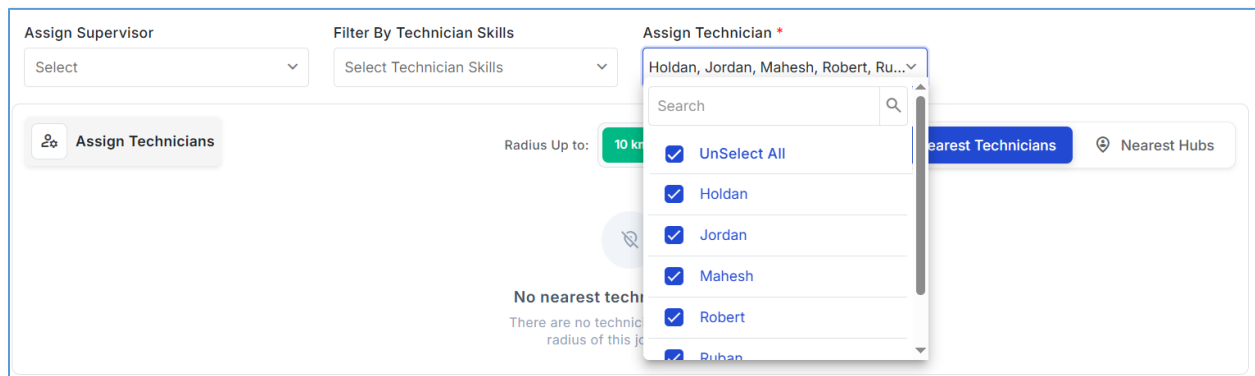
- Identify the nearest technician.
- Reduce travel time.
- Improve response time.
- Optimize technician routing.

Availability for Scheduling

Only technicians who meet the following criteria should be considered for assignment:

- Available (On Duty)
- Possess the required skills
- Located within the configured service radius
- Not overloaded with existing assignments

9.4 Multi-Technician Assignment



The **Multi-Technician Assignment** feature allows dispatchers to assign one or more technicians

to a single work order or schedule. This is particularly useful for jobs that require multiple resources due to complexity, duration, safety requirements, or workload.

Navigation

Work Order → Create/Edit Work Order → Resource Requirement

Overview

Instead of assigning only one technician, the system supports selecting multiple technicians simultaneously. The assigned technicians will be linked to the same work order and can collaboratively complete the scheduled service.

This feature is commonly used for installations, large maintenance jobs, equipment relocation, or services requiring multiple skilled technicians.

Assign Multiple Technicians

To assign multiple technicians:

1. Create or edit a Work Order.
2. Navigate to the **Resource Requirement** section.
3. Select the required **Job Location** or **Premises**.
4. Optionally filter technicians by **Skills**.
5. Open the **Assign Technician** drop-down.
6. Select one or more technicians from the list.
7. Save the Work Order or Schedule.

The selected technicians will be assigned to the same work order.

Search and Selection

The technician selection window provides the following capabilities:

- Search technicians by name.
- Select multiple technicians.

- Select or unselect all technicians.
- Remove individual technician selections before saving.

This makes it easy to manage assignments for larger field teams.

Skill-Based Assignment

Dispatchers can narrow down the technician list using the **Filter by Technician Skills** option before selecting technicians.

Examples include:

- AC Installation
- Electrical Repair
- Plumbing
- Pest Control
- Welding
- Machine Repair
- Customer Communication

This ensures that only qualified technicians are assigned to the work order.

9.5 Emergency Jobs

Product Rules

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Product Rules

Materials Rules

Warranty Rules

Emergency Rules

Billing Rules

☒ Emergency Visits Included

Free Emergency Visits*

Response Time (Hours)*

Emergency Visit Charge *

e.g. 3

e.g. 4

e.g. 1000

The **Emergency Service Rules** section allows organizations to define how emergency service requests are handled under a customer contract. These rules specify the number of

complimentary emergency visits, the expected response time, and the charges applicable for additional emergency visits.

Emergency rules help ensure that service commitments and billing policies are standardized for contract customers.

Navigation

Customer Contract → Product Rules → Emergency Rules

Overview

Emergency Service Rules enable organizations to configure:

- Emergency service eligibility
- Number of free emergency visits
- Guaranteed response time
- Emergency visit charges beyond the free limit

These settings are applied whenever an emergency work order is created for a customer covered by the contract.

Emergency Visits Included

Enable the **Emergency Visits Included** option to allow emergency service requests under the customer contract.

When enabled, the contract can define:

- Number of complimentary emergency visits
- Response time commitment
- Emergency service charges

When disabled, emergency visits are not covered under the contract, and standard service policies apply.

Free Emergency Visits

Specify the number of emergency visits included at no additional cost during the contract period.

Examples:

- 3 Free Emergency Visits per year
- 5 Free Emergency Visits during the contract validity

Once the free visit limit is exhausted, subsequent emergency visits are billed according to the configured emergency visit charge.

Response Time (Hours)

Define the maximum response time within which the service provider is expected to attend an emergency request.

Examples:

- 2 Hours
- 4 Hours
- 6 Hours
- 24 Hours

This response time serves as the contractual Service Level Agreement (SLA) for emergency requests.

Emergency Visit Charge

Specify the amount to be charged for each emergency visit after the free emergency visit limit has been reached.

This charge is automatically applied during billing for additional emergency service requests.