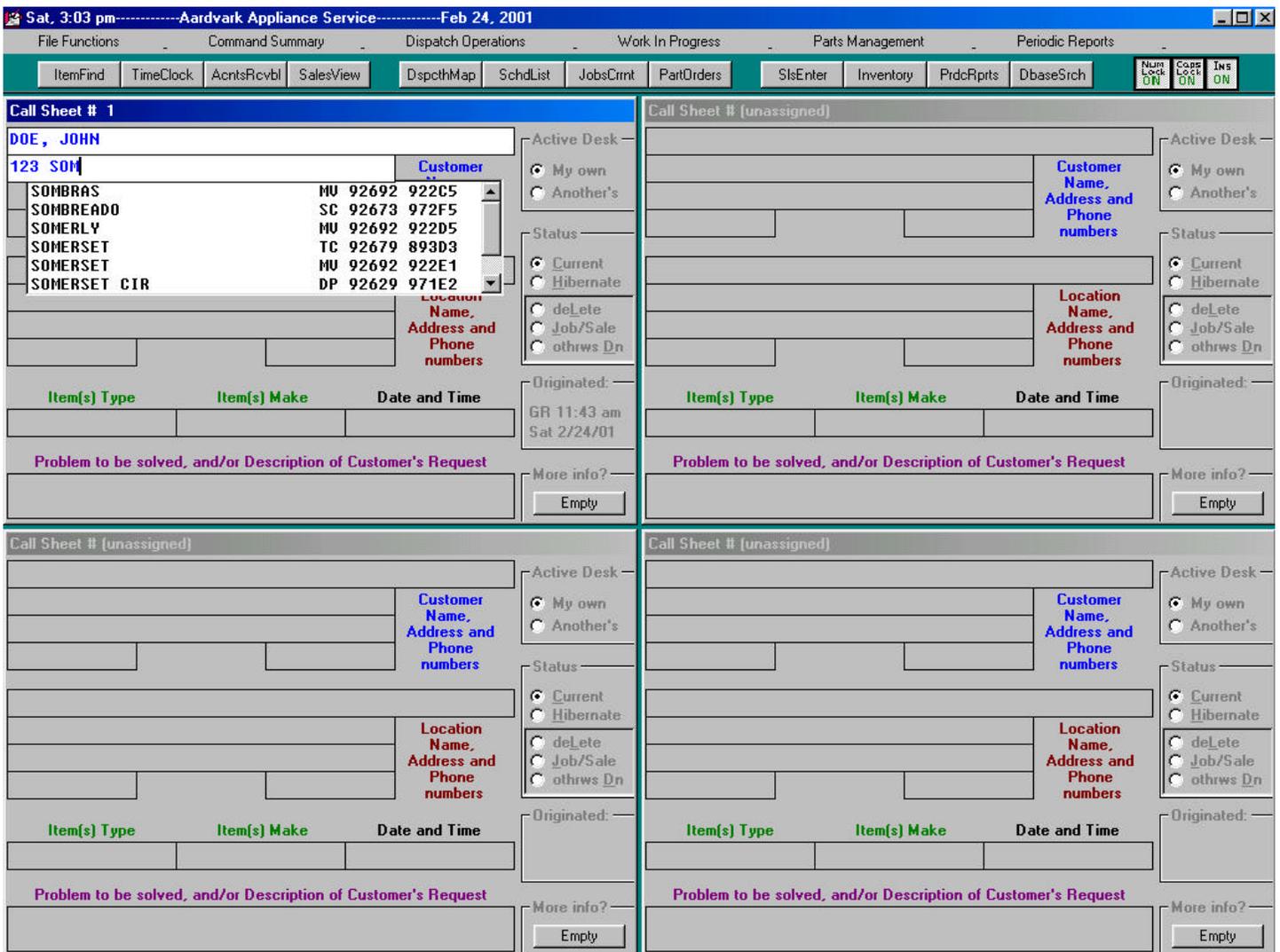
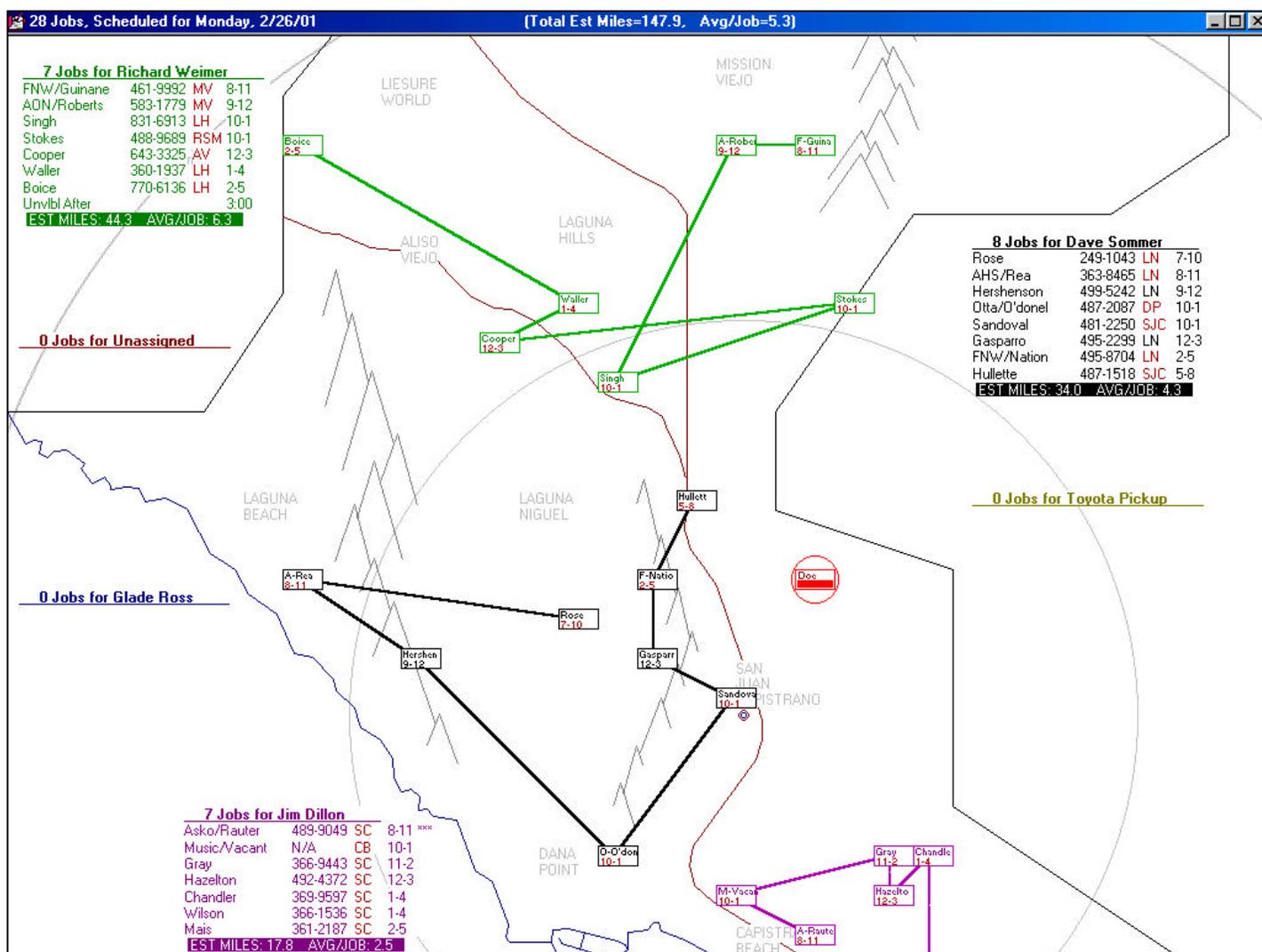


This is an image of the primary interface in ServiceDesk. As shown, an operator is in the process of taking a service order from a telephone caller. She's typed in the caller's name, and moved into the second line to begin typing the address. As she began typing the street-name portion of the address, a drop-down list appeared, which instantly updates (as she types) to display only those particular streets that match whatever sequence of characters, as part of the street name, she's typed at any instant in time (the list includes abbreviations for the city to which each street belongs, applicable zip code, and grid-reference for the locally-used map). When she sees the street she wants, she can select it, and the system will instantly insert all applicable data (i.e., full street name, city name, zip code, map-grid reference, etc.) into appropriate spaces of the callsheet.



After all the basic order information was typed (or inserted via ServiceDesk assistance) into the callsheet (probably took about 20 seconds), the next task was to work-out an appointment for the service call. For this purpose, the operator used her mouse to right-click on the customer's address-line (as created in the callsheet, see last illustration). When she did so, the following image appeared. We call it the DispatchMap. It's a customized sketch of any client's actual service territory (only a portion of the map shows in this particular screen), and on it each job for a given day is graphically displayed in its correct location, color-coded for the tech assigned, and so on. Plus, to assist in the immediate task of scheduling the present caller, the system has flagged his location in bright-red, with a circle around it. Thus, it's very easy for the operator to deduce a sensible appointment for him.



In this image we've completed usage of the first callsheet to create that job, appointment, and so on (plus, the system printed-up a service ticket for it, the whole transaction requiring perhaps 45 seconds). Now, a new caller is on the line, asking for service. As we began typing in their name, a list popped up (over on the right-side of our new callsheet), referencing each of the jobs previously done for this customer. We then were able to select from among those listings to instantly see a history of each such job (in blue above). In the current image we've selected (and are viewing) the fourth job in the list. Besides using this list to review such past jobs, we can also use it to instantly insert the present caller's full name, address and telephone numbers into our new callsheet order.

Call Sheet # 1

Job/Invoice # 49239, Archived Item # 13062 out of 32903

AMERICAN HOME SHIELD S.W.O. # 13746404

P.O. BOX 866
 CARROLL, IOWA 51401
 800-326-4357 800-827-4636

Customer Name, Address and Phone numbers

JOHNSTON, FRED AND SHIRLEY \$35 DEDUCTIBLE
 212 MONARCH BAY DR [971E4]
 DANA POINT
 499-4234

Location Name, Address and Phone numbers

Item(s) Type: OVEN, Item(s) Make: JENNAIR, Date and Time: 21 MON 1-2:30

Problem to be solved, and/or Description of Customer's Request
 TOUCH PANEL STILL IS NOT WORKING PROPERLY
 POSSIBLE SALES FEE DUE

Display Basis

- First page
- Middle page
- Last page
- find Name
- find Address
- find Telephn
- P.O. # Srch
- Street Srch
- Invc # Srch

Originated:
 BN 10:59 am
 Mon 7/21/97

More info?
 Empty

7/21/97 11:19 am: Printed to invoice by BN. Scheduled for 21 MON 1-2:30
 7/21/97 1:17 pm: Dispatched to GR
 7/22/97 8:59 am: GR was there on 21 MON from 2.00 to 2.35, unable to replicate failure, holding invoice open for few days
 7/24/97 7:43 am: BN scheduled for 24 THURS 9-12
 7/24/97 9:51 am: Dispatched to GR
 7/25/97 10:33 am: GR was there on 24 THURS from 9.40 to 10.00, disconnected probe jack from computer (had erroneous non-perfect open across conductors). Job Completed.
 7/25/97 11:16 am: BN recorded billed completion in Sales Journal, total \$83.00

Call Sheet # 2

JOHNSTON, F

Customer Name, Address and Phone numbers

Location Name, Address and Phone numbers

Item(s) Type: , Item(s) Make: , Date and Time:

Problem to be solved, and/or Description of Customer's Request

Active Desk

- My own
- Another's

Status

- Current
- Hibernate
- deLete
- Job/Sale
- othrs Dn

Originated:
 GR 3:15 pm
 Sat 2/24/01

More info?
 Empty

Active Desk

- My own
- Another's

Status

- Current
- Hibernate
- deLete
- Job/Sale
- othrs Dn

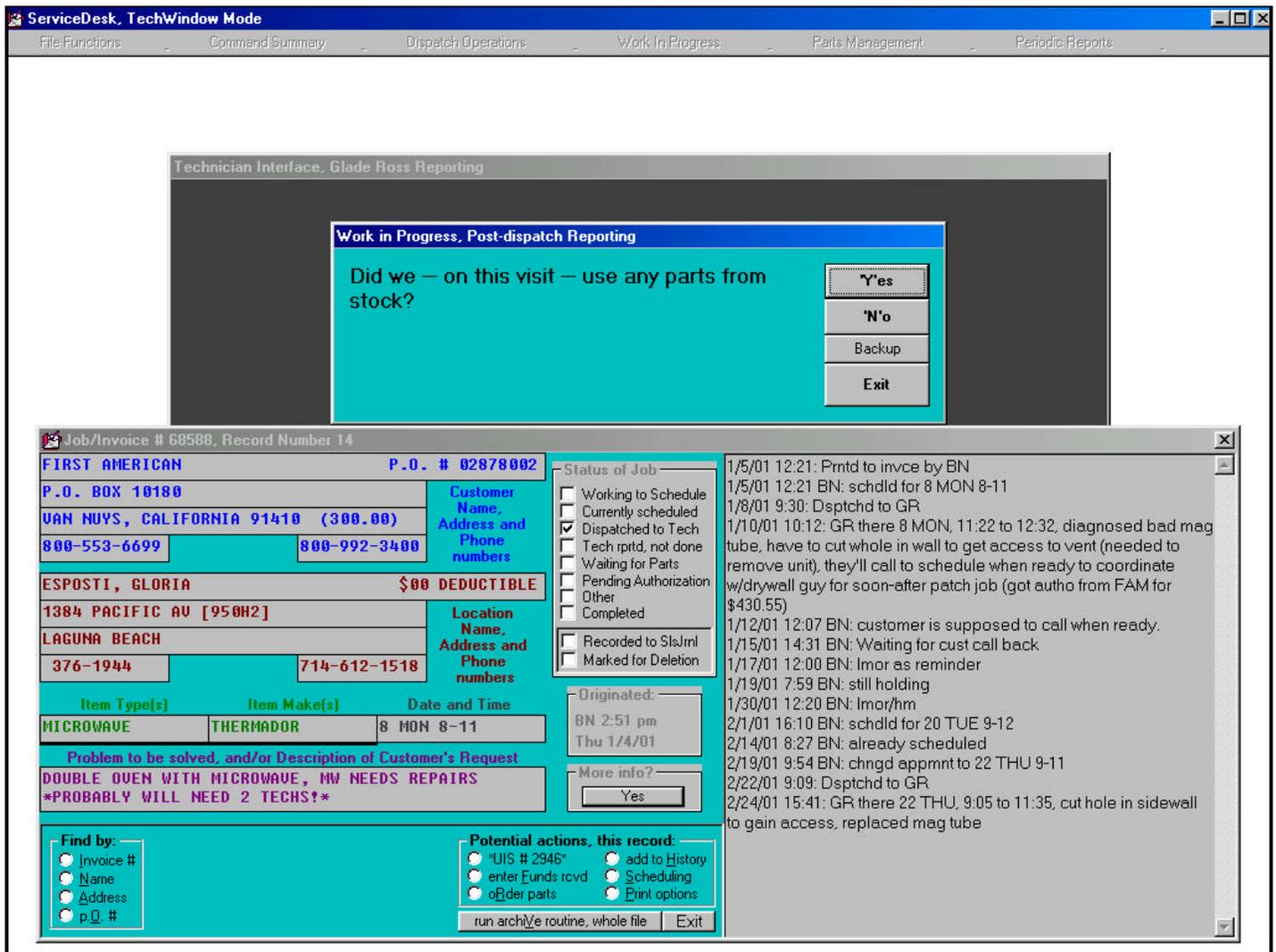
Originated:

More info?
 Empty

JOHNSTON, FRED	212 MONARCH BAY	499-4234
JOHNSTON, FRED	212 MONARCH BAY	499-4234
JOHNSTON, FRED	212 MONARCH BAY	499-4234
JOHNSTON, FRED	212 MONARCH BAY	499-4234
JOHNSTON, FRED	212 MONARCH BAY	499-4234

Here we are making a report to the system regarding what happened on a particular dispatched appointment in connection with the displayed JobRecord. This reporting system works in a dialog fashion, asking the operator a series of questions (what time did the tech start, what time did he finish, what were his findings and actions, does he need to order any non-stock parts, did he use any items out of normal stock, did he collect any funds [if so what kind and for how much], etc.).

Ideally, we think it's best for technicians to make these reports themselves (the interface is designed to make it practical and safe). However, if that doesn't work for you, it's also made to be practical for an office person to make the reports for the technicians.



After the job is finally completed, it's time to enter the completed sale to the SalesJournal. That's where this little form comes in (we call it the "SalesEnter form") While the previously-illustrated reporting method (see last page) is designed to collect all the various particulars that are concerned with what actually *occurred* on the job (and thus collecting the info needed for related processes, such as ordering parts, restocking used ones, managing funds received, and so on), this one is concerned only with recording the fact of the completed sale, for how much, to which tech it should be credited, and the details concerning billing, if any.

Sat, 4:10 pm ----- Aardvark Appliance Service ----- Feb 24, 2001

File Functions Command Summary Dispatch Operations Work In Progress Parts Management Periodic Reports

ViewBckps EarningsRts MailList PrintClaims **Schd-Archv** SchdList JobRpts PartRqsts AppsJml Inventory PrdcRpts TechWndw Num Lock ON Caps Lock OFF Ins ON

Call Sheet # 1

DOE, JOHN
 123 SOMERSET LN [952E5]
 SAN JUAN CAPISTRANO
 661-3774

Customer Name, Address and Phone numbers

Active Desk
 My own
 Another's

Status
 Current
 Hibernate
 deLete
 Job/Sale
 othrs Dn

Location Name, Address and Phone numbers

Item(s) Type Item(s) Make Date and Time

REFER WESTINGHOUSE 26

Problem to be solved, and/or Description of Customer's Request

NOT COLD, LEAKING WATER ON THE

Call Sheet # 2

JOHNSTON, FRED AND SHIRLEY
 212 MONARCH BAY DR [971E4]
 DANA POINT
 499-4234

Customer Name, Address and Phone numbers

Active Desk
 My own
 Another's

Status
 Current
 Hibernate
 deLete
 Job/Sale
 othrs Dn

Location Name, Address and Phone numbers

Item(s) Type Item(s) Make

WASHER MAYTAG

Problem to be solved, and/or Description of Customer's Request

WON'T SPIN

Info for Accounts Receivable File

Billing name and mailing address, including zip code

FAM-Esposti [02878002]
 P.O. Box 10180
 Van Nuys, California 91410 (30)

Attn designee, or salutation: Amnt Pd to date: Date completed:

Accounting 02/23/01

Since this is a home warranty company, ordinary dunning letters won't be sent. Thus, our information is formatted somewhat differently.

GR,FAM-ESPOSTI,68588,0,191,2,45,180,430,54,2

For each completed sale, type these item's of data, each separated by a comma:
 TchIntl, CstmrNm, InvcNmbr, MrchndsSlid, PrtsSlid, SCISld, LbrSlid, TtISld, and PvcD
 (the last item will be a "1" if presently paid or a "2" if billed)

Then press Enter to input to the list

Save Exit

