Welcome Everyone

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HVACBizPro Training
Dispatching Module

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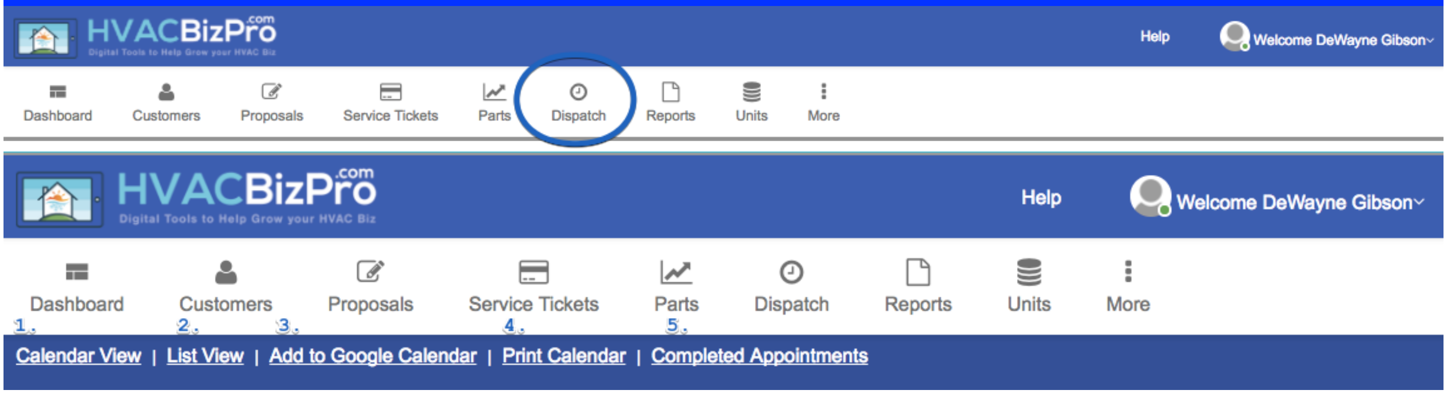
Agenda

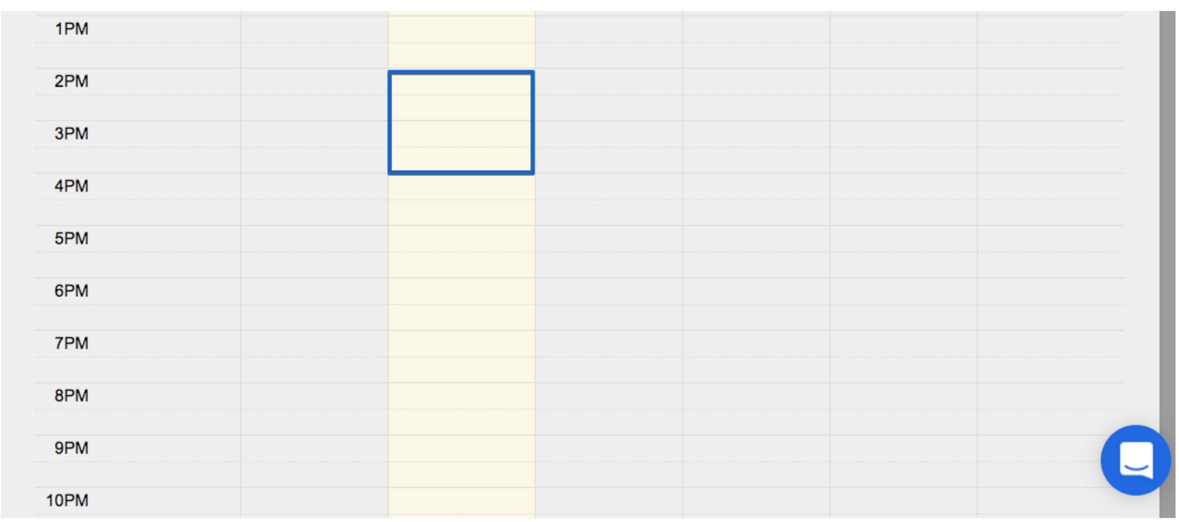
- Dispatch Tab
- Setting an Appointment
- The Process
- Completing the Appointment

Dispatch Tab



Choosing the Dispatch header and you will see two dropdowns. Appointments and Add Appointment.
To see the entire calendar you can click Appointments.

1. You can view the Calendar by clicking "Calendar View"
2. You can view the "list" of appointments by clicking here
3. You can add the appointments to your Google Calendar by choosing this function
4. Click here to print the calendar
5. Choose this one to view the completed appointments



6. Add the appointment by clicking inside the calendar. It will open up a new window to enter the customer's info

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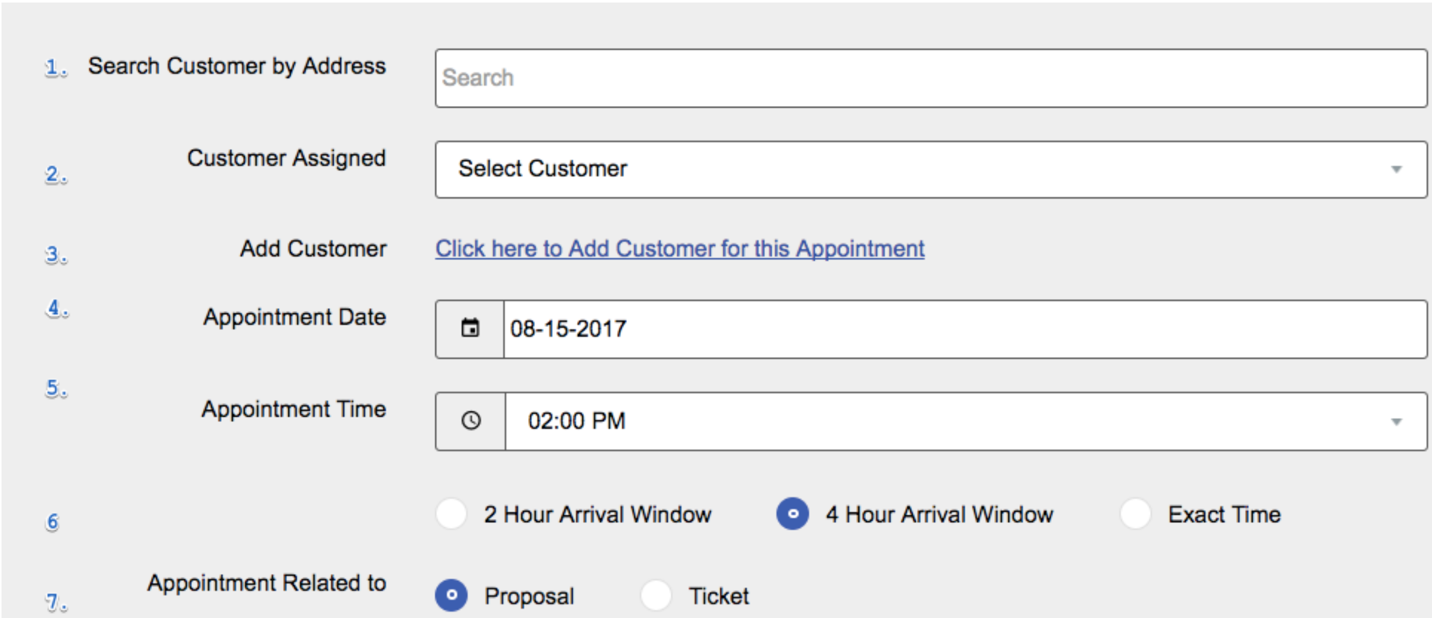
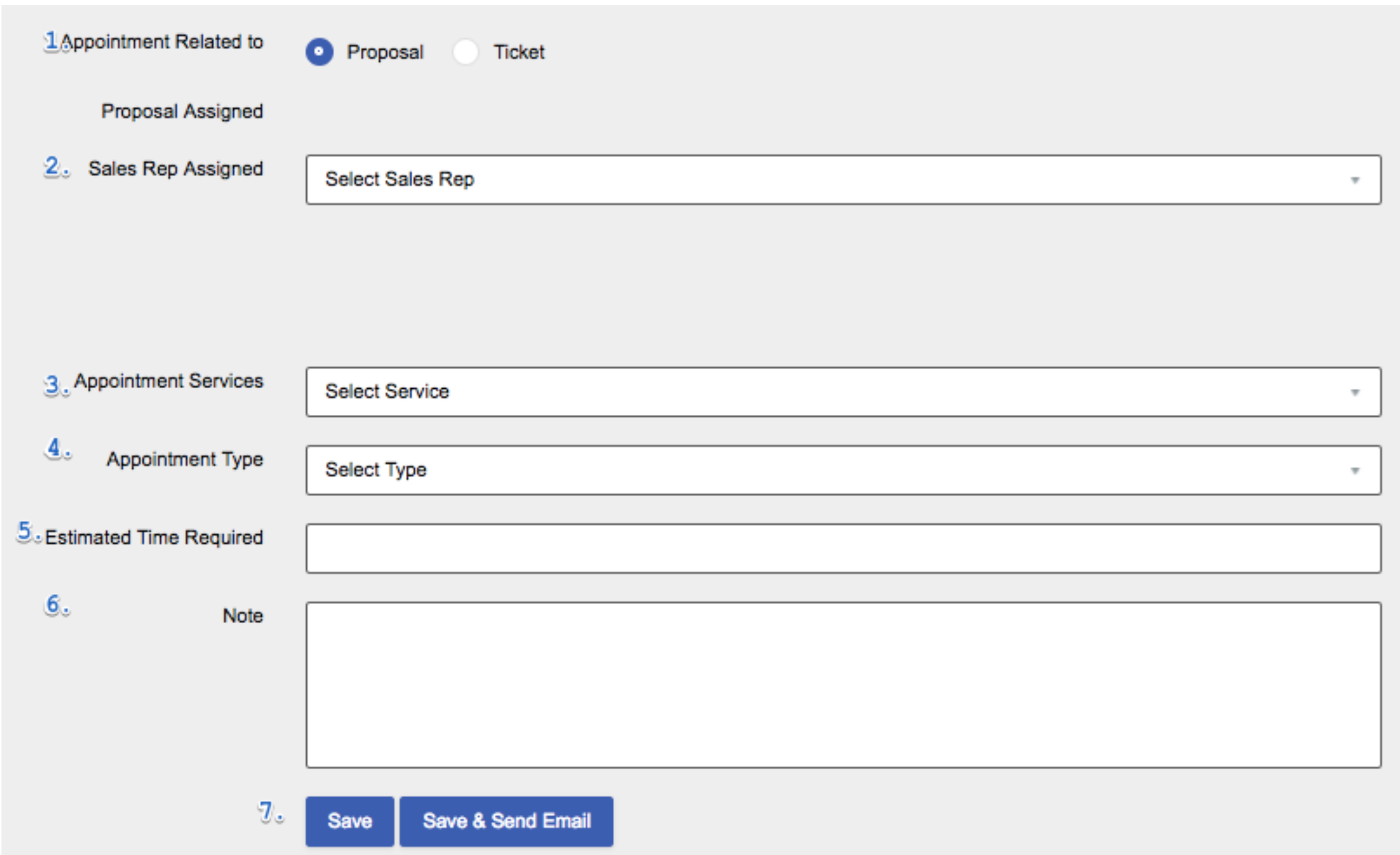
Appointment Entry



1. If the customer is in the database, they will appear if you type their address.
2. Once you select the customer, this field will populate.
3. Choose this link if the customer does not exist. A new window will open and when completed you can save the information.
4. Populated based on your having chosen the time and day on the calendar. This field can be changed manually
5. Populated based on your having chosen the time and day on the calendar. This field can be changed manually
6. You have three options to choose from. A two hour or four hour arrival window, OR an exact time.

Appointment Entry



1. Choose the appointment type
2. Choose the company representative
3. Choose the Appointment Department
4. Choose the Appointment type
5. Estimate the time allowed on the job in hours
6. Enter any notes you want the company representative to see. These are not seen by the customer.
7. Click "Save" to only register the appointment. Click "Save & Send Email" when you want the customer to receive the "thank you" email from the Admin that is set up in the Defaults area for the company.

Appointment Emails

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ESS1

www.entsellingsolutions.com | travel@entsellingsolutions.com | 904-260-2622

Hi, I am DeWayne Gibson with Enterprise Selling Solutions. As the owner of ESS I would like to take a moment and thank you for allowing us to come to your home or office and take care of your cooling and/or heating needs. We pride ourselves on getting it done right the first time. For that reason we spend many hours training our representatives so they are always the most knowledgeable in our industry and market.

Assuming our schedule stays on course, Our plan is to see you in the time range we set with you today. Should for some reason our plans change we will notify you of those changes in the most convenient time. Please let us know via call or email that your plans may change.

Staying COOL,
https://youtu.be/aUgcvSQDYXo

DeWayne Gibson

Technician Certificate(s):

NATE
NORTH AMERICAN TECHNICIAN EXCELLENCE

The customer receives this email. The logo at the top will be the logo entered in the company admin area. The picture of the admin is listed in the MyInfo area of the Admin.

The evening of the call the customer will receive a reminder of the following days appointment with the company representative.

At the same time the customer receives the notification of the appointment, the company representative receives this email. Using the proper device, the Rep can click on the address and get turn by turn directions to the home. They will also get instructions the evening before the call.
The Company Rep can log into their access and see their calendar for the day.

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ESS1

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YOUR APPOINTMENT

Scheduled for 08-15-2017 Will arrive Between 4:00 PM to 8:00 PM
at 7641 Lady Street N. Charleston SC 29420

YOUR CUSTOMER

Work Order Number	N/A	
Customer Name	Donnell Gibson	
Customer email	dewayne@entsellingsolutions.com	
Customer Address	7641 Lady Street N. Charleston SC 29420	
Appointment Total Estimated Hours	3	
Customer Phone	Work Phone: 9047594710	Cell Phone: 9047594710
Appointment Service Type	Replacement Department	
Appointment Type	AOR Call	
Notes	Needs New AC	

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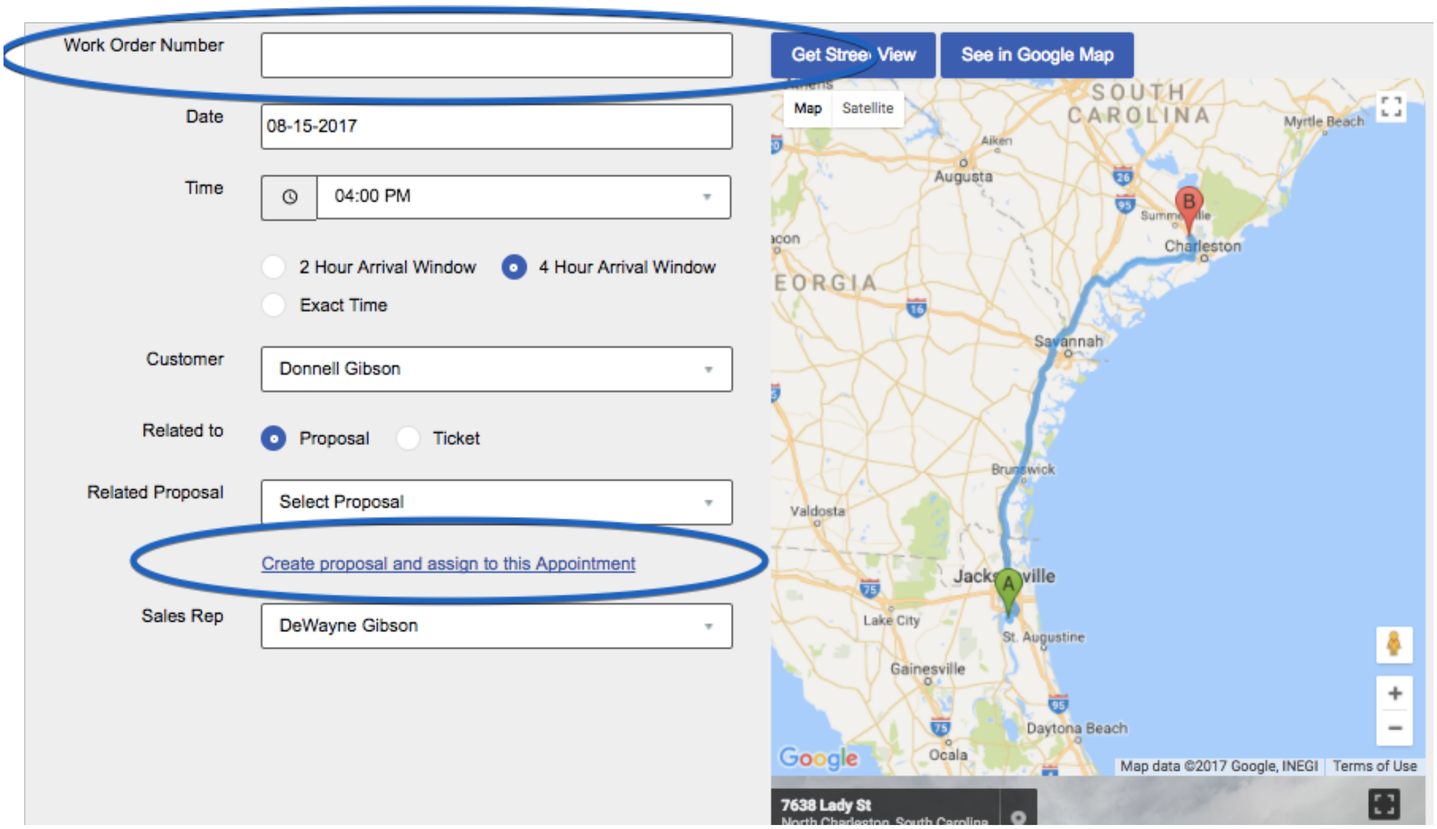
Sales Rep/Tech View



In the SalesRep/Tech access, the user can use the system to see the best path from the last appointment. They also can create a proposal from the appointment. See the module on 'Creating a Proposal' to see how to go beyond this point to create a proposal.

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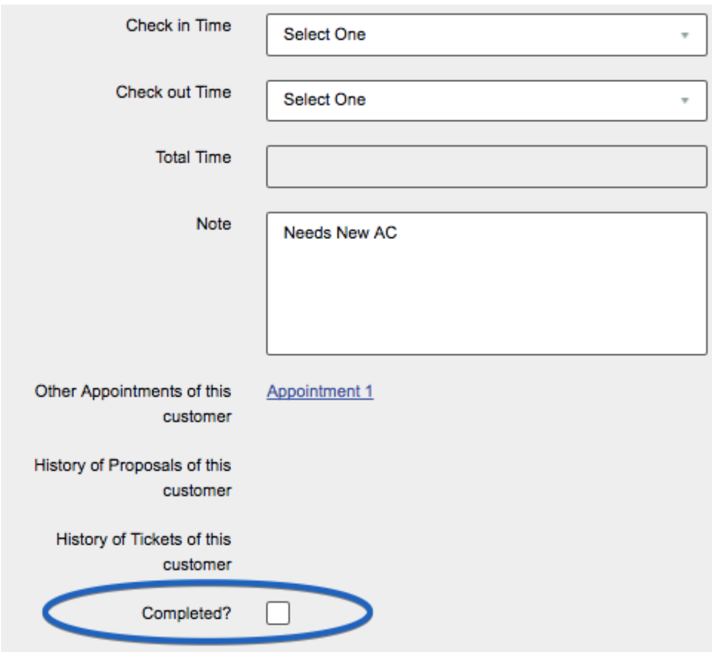
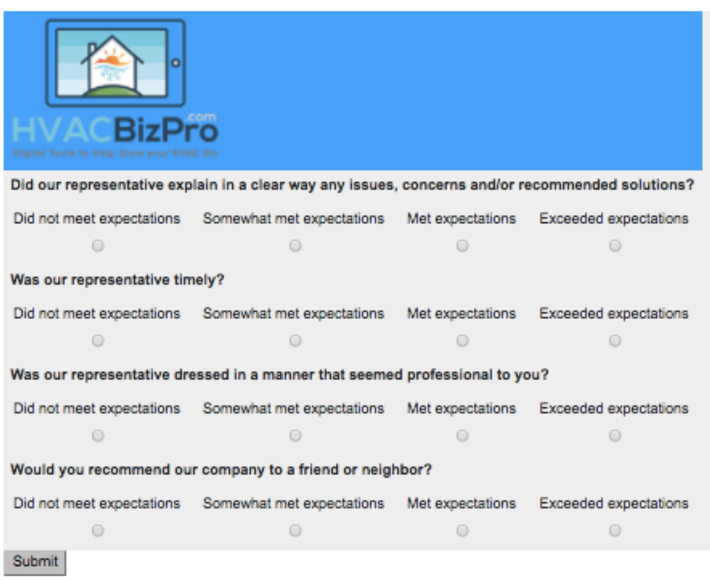
Follow-Up Emails


Check in Time: Select One
Check out Time: Select One
Total Time
Note: Needs New AC
Other Appointments of this customer: Appointment 1
History of Proposals of this customer
History of Tickets of this customer
Completed?

Once the appointment is completed, the company representative will then put in a check in time and check out time and choose completed.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Did our representative explain in a clear way any issues, concerns and/or recommended solutions?
Did not meet expectations | Somewhat met expectations | Met expectations | Exceeded expectations

Was our representative timely?
Did not meet expectations | Somewhat met expectations | Met expectations | Exceeded expectations

Was our representative dressed in a manner that seemed professional to you?
Did not meet expectations | Somewhat met expectations | Met expectations | Exceeded expectations

Would you recommend our company to a friend or neighbor?
Did not meet expectations | Somewhat met expectations | Met expectations | Exceeded expectations

Submit

Simultaneously, the customer will receive a four question survey.

These are four questions intended to be short, and represent how the customer feels about the company representative.

Did the course meet your expectations?

Did not Meet ☐ Met ☐ Exceeded ☐

The course followed a logical clear order and that was applicable to HVAC?

Did not ☐ Yes ☐ Exceeded ☐

I learned from the trainer and my fellow students?

Did not ☐ Yes ☐ Exceeded ☐

Comments/Feedback/Ideas… That might have made my learning experience better…

____

____

____

____

Participant__________________ Trainer______________