

Service Dispatch Software

The real beauty lies with integration

by Patty Harder

Integration between your core accounting modules, such as accounts payable, accounts receivable, general ledger, job cost, and payroll, is a given in today's technology driven world. For service contractors, however, integration that goes beyond accounting to include dispatch operations can greatly enhance the productivity and profitability of their service business.

Take a look at your service dispatch board for any given day and think about the many steps needed to create that schedule. Customer calls had to be answered; work orders had to be created; technicians had to be assigned — and often reassigned — to work orders; materials had to be ordered or pulled from inventory, and the list goes on. On the surface, this may not seem terribly complicated. But if your dispatch software is not integrated with accounting, it may be much more complicated — and time consuming — than it needs to be.

Let's assume that your dispatch software incorporates the latest technology and is an integrated component of your accounting package while we take a more detailed look at your service operations.

Wide screen technology gives you a broad view of your dispatch board for assessing the schedule, hour-by-hour or by technician. Color-coding tells you the status and priority of each work order, including which ones have been completed, which ones haven't and why, and which ones need materials ordered. Drag and drop capability makes it easy to assign and reassign work orders as needed. Simply drag a work order across the board and drop it in its new location.

Communicating with your technicians is quick and easy because paging and e-mail capability is available within the software. Perhaps your technicians even have access to your dispatch software via mobile hand-held units. Enhanced communication results in increased technician productivity.

But the real beauty of this dispatch board isn't the color coding, drag and drop capability, or communication technology — although they are certainly honorable mentions. The real beauty lies in the integration, where single data entry and information-sharing rule.

To fully appreciate this, we need to back up from the dispatch board and go to the original customer calls that created your schedule. Keep in mind that we're

still under the assumption that your dispatch software is an integrated component of your accounting package.

When a service call comes in, first determine if the caller is a new or existing customer. For a new customer, entering billing and site information is quick and easy. And because of integration, that information is instantly available throughout your software. No need to duplicate that data entry. You can even record the caller's lead source. Maybe they found you in the yellow pages. Or, perhaps they saw signage on one of your service trucks. Tracking your new customer lead sources provides valuable marketing information for growing your business.

For an existing customer, it's easy to review — and update if needed — billing and site information. Taking a look at their service history, reviewing open accounts receivable items for payment issues, and checking to see if an open work order for the site already exists is no problem. Accessing these details is just a mouse click away because the various look-up and data entry screens are intricately woven together.

As you go to create a new work order or revise an existing one, the details you have already gathered automatically appear on your screen. The ability to create user-defined flat rate tasks, such as the installation of a new water heater, streamlines additional data entry and simplifies quotes. Writing purchase orders, checking inventory for needed materials, and tracking your costs all happen seamlessly.

The service call has been answered and a new work order created. Now, with a simple click of your mouse, you are ready to schedule a technician to do the work. And with this mouse click, you find yourself back at the service dispatch board.

And the beauty of integration doesn't stop there. After the service is completed, your software lets you invoice your customer immediately — without duplicate data entry. You control the pricing and profitability of each invoice. Detailed descriptions of the work performed, and any additional work recommended are printed for your customer's review.

The reports and listings within your software are extensive. They are easy to use and give you the flexibility you need to fully evaluate your service operation. You can measure your technicians' productivity, evaluate job profitability, and review history. Technology within your software allows you to print, fax, e-mail, or electronically file your reports as desired. In addition to the various reports, on-screen inquiries throughout the software let you search using a variety of criteria, including technician, work site, customer, work date, or work order status.

Dispatch software is an indispensable tool for contractor's who perform service work. When your dispatch software is an integral part of your accounting and service software, this tool becomes a more efficient and productive part of the daily management of your service operation.

They say beauty is in the eye of the beholder. If so, then I see beauty in the effortless flow of information between one source (accounting) and another (dispatch). Because when it comes to data entry, once is enough.

Patty Harder is the Marketing Manager at Dexter + Chaney of Seattle, which develops Forefront® Construction Management Software. She can be reached via e-mail at patty@dexterchaney.com.