

Dispatch a Work Order Appointment

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Dispatching Methods

There are two methods for dispatching appointments: Live or Manual.

- **Live Dispatching:** This method is used if dispatch times are being entered in real-time as the technician calls into the office to report their times. If your company is using the mobile application, as technicians enter their dispatch times, the appointment record in Managely is automatically updated.
- **Manual Dispatching:** If technicians report their dispatch times to the office after the fact, all dispatch times are entered at one time.

Dispatch an Appointment

Appointment dispatch times are entered from the work order or the calendar. Using the calendar is the quickest way to enter dispatch information. For instructions on dispatching an appointment from the calendar, refer to the Calendar topic later in this document.

To enter dispatch times for an appointment, access the work order from the customer record or by selecting the work order from Accounts Receivable > Work Orders > Open Work Orders tab.

Once the work order is open on your screen, click the **Edit** button at the upper right of the page.

The screenshot displays the 'Work Order 2556' interface in edit mode. At the top, there are buttons for 'Edit', 'History', 'Tasks', and 'Deliver/Print'. Below the header, the technician 'Wood, Emily - 3719' and the service 'Burglar Alarm - 9173-01' are listed. A summary table shows the following details:

Type	Service Call	Salesperson	Dan Brown
Requested By	-	Sales Package	-
Phone	7342584646	Service Level	SVC T&M RES
Email	emilyLwood@gmail.com	Base	85
PO Number	-	Increment	15
Proposal	-	Labor	75
Work Order Date	March 30, 2022	Bill After	30
Next Appointment	-	Warranty Labor	Labor - 1 Year
Technician	-	Warranty Parts	Parts - 1 Year

Below the summary table, there is a navigation bar with tabs for 'Appointments', 'Items', 'Parts', 'R/M/R', 'Billing', 'Notes', 'System Parts', 'System Notes', 'Zones', 'Purchase Orders', 'Site Work Order History', 'Documents', 'General Ledger', and 'Part Ledger'. The 'Appointments' tab is selected, showing a table of appointments:

Appt #	Appointment Time	Last Activity	Status	Technician	Est Length	Billable Min	Break Min	Labor	
1697	3/31/22, 11:00 AM	3/31/22, 11:00 AM	Scheduled	Bill Toro	60	0	0	\$0.00	 
1699	3/30/22, 11:15 AM	3/30/22, 11:15 AM	Scheduled	Kathy Ackerman	60	0	0	\$0.00	 

At the bottom of the appointments table, there is a pagination bar showing '0 - 0 of 0 items' and a 'Refresh' button.

The work order is displayed in edit mode. Click the Appointments tab. Locate the appointment you want to dispatch, and then click the edit button (pencil icon).

Work Order 2556 Save Cancel Void

Wood, Emily - 3719 Emily Wood Burglar Alarm - 9173-01

Service Fee \$85.00	Status • New	Requested By Emily Wood	Technician Carolyn Johnson
Labor \$0.00	Site • #3719-01 Emily Wood - 45722 Chandler	Phone (734) 258-4646	Salesperson • Dan Brown
Est Tax \$5.10	System Burglar Alarm - 9173-01	Email emilyLwood@gmail.com	Sales Package
Total \$100.10	Tax • MI	PO Number Purchase Order	Service Level • Time and Material Residential
	Type • Service Call	Work Order Date 3/29/2022	Warehouse Main Warehouse

Appointments Items 1 Parts 0 RMR 0 Billing Notes System Parts System Notes Documents Custom Fields

Appt #	Appointment Time	Last Activity	Status	Technician	Est Length	Billable Min	Break Min	Labor	
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1699	3/30/22, 11:15 AM	3/30/22, 11:15 AM	Scheduled	Kathy Ackerman	60	0	0	\$0.00	 

0 - 0 of 0 items

The appointment record is displayed.

- **Live Dispatching:** Clicking the Now button fills in the date/time field with today's date and the current time.
- **Manual Dispatching:** Enter the date/time for each of the three dispatch fields: Dispatch Time, Arrival Time, and Completed Time.

When finished, click the **Save** button at the bottom of the record.

Edit Appointment X

Details Breaks

Appointment Time • 3/31/2022 11:00 AM	Dispatch Time • 3/29/2022 10:30 AM Now
All Day <input type="radio"/> NO	Arrival Time • 3/29/2022 11:00 AM Now
Technician • Bill Toro	Completed Time • 3/29/2022 11:55 AM Now
Additional Technicians	Length (minutes) 55
Expected Length (in minutes) 90.00	Billable minutes 60
Hourly Labor Rate • 75.00	Total Labor Amount \$75.00
Customer Confirmed <input type="radio"/> NO	

Save Cancel

Lastly, click the **Save** button at the upper right of the Work Order page.