

Service Ticket Life Cycle

Double and triple entry means time and costly mistakes. Let's first take a look at the life cycle of a typical service call now. For example:

A customer calls in to the office and says: "This is David Smith. You guys were just at my house and worked on my problem. It is doing the same thing it was doing when I called the first time."

The information is written down on a work order form by your service manager. He then has to put the customer on hold or ask that he can call him back while he researches the information. The service manager then goes to a filing cabinet and pulls the customers folder. Hopefully there was only one David Smith and he got the address. Then he has to call David back and say, "Yes sir, It appears we were there a month ago. I will get a technician by right away to correct the problem." Your service manager then calls a technician and gives him the information. The service technician then re-writes the customers information down on another work order form. He then gets out his map book to look up the customers address. The technician then drives to the customers residence, hopefully taking the fastest route. The problem is diagnosed and it appears to be the same problem. The technician calls back to the service manager, who is probably on the phone, and has to be placed on hold. When he finally talks to the service manager they decide that it was a defective part and replace it free of charge. The work order then gets filled out by the technician and hopefully gets turned back in to the office. Once in the office the service manager reviews the information. The technician has forgotten to put the part number on the work order, so the service manager has to go back to the file cabinet to get the information. Once the work order has been completed, it then goes to accounting for invoicing. Assuming all the information is in place, accounting then enters the zero invoice in the system and makes the appropriate journal entries to pull the replaced part from inventory. The zero invoice is then mailed to the customer and the work order is stapled to a paper copy of the invoice and returned to the filing cabinet, where it is hopefully placed in the correct David Smith folder.

Summary:

The Service Manager spent 25-40 minutes handling one service call for zero income.

The Field Technician spent 20-30 minutes on the phone and filling in the work order.

The Accounting department spent 5-15 minutes entering the invoice and making the appropriate journal entries.

The same information was written or keyed in 3 to 4 times assuming there were no mistakes. The work order form itself gets physically moved to 3 or 4 different departments.

How many callbacks has your company received? Is this a defective manufacturer part? How can this problem be prevented in the future? Did the original paperwork have enough information to determine if the service call should have been warrantied? Has the manufacturer been notified for a refund?

Now let's take a look at the same service call with Dispatched.

Your service manager has David Smith on the phone. Once he starts typing the customer's name into the service ticket form, the software automatically fills in the correct address, phone numbers, etc. With one click of the history button, your service manager sees that your company had just replaced part number A1083 a few weeks back. He then informs the customer that he will have a service technician there shortly. Then the service manager looks at his map and sees that the original technician is in the same area. He then checks the schedule to see if he will have time to stop by before his next scheduled appointment. He then electronically dispatches the work order to the service technician. The service technician receives immediate notification that he has a new work order. Using his mobile device he gets all of the customers information including a detailed map showing the customers location. After diagnosing and fixing the problem, the technician clicks off which parts were used and sends the completed work order back to the office in real time. He then prints or emails a copy of the service ticket to the customer. The service manager reviews the information and marks the electronic work order for invoicing. The accounting department then receives notification that a work order is ready to invoice. With one click the accountant invoices the work order and the appropriate entries to inventory are automatically made.

Summary:

The Service Manager spent 5 minutes handling one service call.

The Field Technician spent 5 minutes viewing and filling in the work order.

The Accounting department spent 2 minutes invoicing the work order.

The work order is marked as a callback and included in the callback report automatically. A report is then run on the part and it reveals several callback incidents for this same part. The manufacturer can then be notified of the issue and possibly issue a refund. All information is electronically stored in the software for future use. There is no double entry of the information, and very little room for mistakes.

The above is simply one example of the valuable time savings and organizational abilities of Dispatched service management software. For a complete guided tour of the software call 1-866-437-7824.