


# Quick Start Guide – mpengo Dispatch Board

Thanks for using mpengo Dispatch Board, and mpengo ServiceCall. We believe that the combination of these two products brings an element of efficiency and professionalism not before seen in the Service Industry! Throughout your experience, we're always available to discuss or help out with any specific issues you may have: just drop us a line at [support@mpengo.com](mailto:support@mpengo.com) or click **Help / Support** on the Board, or tap **Support** on the ServiceCall app.



## mpengo Dispatch Board - M.L. Stewart

⏮
⏪
Tuesday, Apr 01, 2014
⏩
⏭

Tue  
Apr 1
7 day  
view
⏭

	Tue, Apr 1, 2014			Wed, Apr 2, 2014			Thu, Apr 3, 2014			Fri, Apr 4, 2014			Sat, Apr 5, 2014			
	ADD	SEA	T3	ADD	SEA	T3	ADD	SEA	T3	ADD	SEA	T3	ADD	SEA	T3	
07:30am																07:30am
08:00am																08:00am
08:30am																08:30am
09:00am																09:00am
09:30am																09:30am
10:00am																10:00am
10:30am																10:30am
11:00am																11:00am
11:30am																11:30am
12:00pm																12:00pm
12:30pm																12:30pm
01:00pm																01:00pm
01:30pm																01:30pm
02:00pm																02:00pm
02:30pm																02:30pm
03:00pm																03:00pm
03:30pm																03:30pm
04:00pm																04:00pm
04:30pm																04:30pm

**DB-Actions**

Take New Call & Park It

View Future Calls

**Maintenance**

Customers

Settings

Logout

**Service Scheduler**

**Reports**

**Tools**

**Help**

**Legend**

Dispatched Calls

Open Calls

Completed Calls

Tech Time Off

Quote-only

**Parked Calls**

Svc Date	Svc Time	Booking Date	Customer	Contact	Service At	Service Call Details	
Use the Parked Calls area as an intermediate holding spot to move calls around.							
		Tue Apr 1	Francine Bailey		645 Collins Rd West Palm Beach, FL	Air not working properly	Edit
		Tue Apr 1	Helen Adams			Check Coils in Air conditioner	Edit
Use the Parked Calls area as an intermediate holding spot to move calls around.							

## Setup:

The screenshot shows a 'Settings' window with three main sections:

- Company Information:** Fields for Company Name (M. L. Stewart), Password (masked), Contact (Mary Lawrence), Address & Phone # (410 Fern St, P.O. Box 325, West Palm Beach, FL 33401), and Email Address (Support@mpengo.com).
- Dispatch Board Settings:** Includes 'Display Units' (radio buttons for 15, 20, 30, 60 minutes; 30 is selected), 'Time Range' (Start: 07:00am, End: 06:00pm), and 'Max # of Techs to display per page' (dropdown set to 3).
- Options:** Includes 'Auto Assign Service Call Numbers' (radio buttons for Automatically Assign and Manual Entry; Automatically Assign is selected), 'Default Schedule View' (radio buttons for 1 Day, 5 Days, 7 Days; 5 Days is selected), and 'Email Calendar Appointment' (radio buttons for No, Yes, Yes with 15 min reminder; Yes with 15 min reminder is selected).

At the bottom are 'Okay' and 'Cancel' buttons.

## Settings:

The first thing you should do is sign in, go to Settings, correct any necessary information, enter your phone number in the Address field and change your password if desired.

### Some other settings:

- **Email Address:** The system uses this email address as the "From Address" for Dispatched calls and will also automatically CC this address when the calls are dispatched. With this in mind, the calls will actually be sent to two addresses (tech's email and this email address in settings). If you want to include a third, then you can do this by adding the additional address on to each of the Technician's addresses.

\*See Tech Settings below.

- **Display Units:** 15, 20, 30 and 60 min. intervals. We recommend 30 or 60-minute intervals, but the choice is yours.

- **Start Time /End Time:** as it says, but you won't be allowed to book outside this range.

- **Maximum # of Techs to Display per page:** declare how many techs to display at one time: the optimum number may depend on the size of your display. Any Techs outside this range can be accessed by the left and right arrows on the 'Tech Name' row.

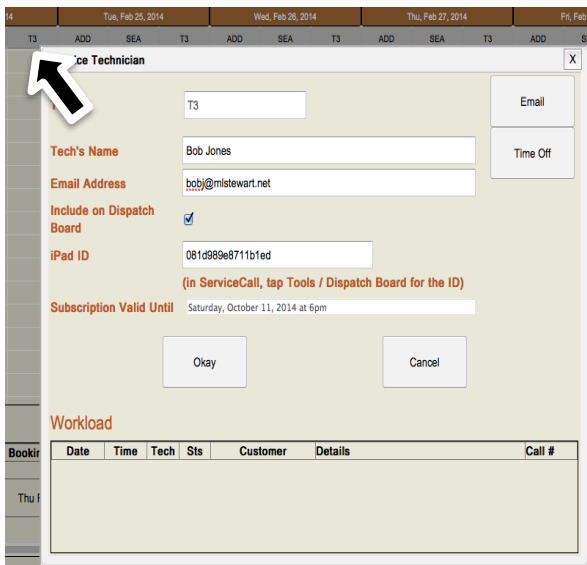
- **Auto Assign Service Call Numbers:** we strongly suggest letting the Board assign numbers (the manual entry was done for a client who had a need for an 8 digit SC#, where the first 2 digits meant something, the next 3 something else, and so on). **Note:** if you choose manual entry you must press tab after entering the service call number to get to the customer search field.

- **Default Schedule View:** choose 1, 5 or 7-day view for your default.

- **Email Calendar Appointment:** Option to include a Calendar Appointment attachment when a call is dispatched allows the call details to be added to your email calendar with an optional 15 minute reminder. This can be helpful for any tech that does not carry an iPad with mpengo Service Call. **\*Note not all versions of Microsoft Outlook support the Alarm/Reminder feature.**

**Note:** When the Dispatch Email is received on your iPhone or device you can tap on the .vcs attachment, which will open up the details of the call. You then have the option at the bottom to '**Add to Calendar**'. If you tap on this event in your calendar you can also tap on 'Show All Notes', which will show you the complete service call details including customer phone number.

## Tech Settings:



Tue, Feb 25, 2014 Wed, Feb 26, 2014 Thu, Feb 27, 2014 Fri, Feb 28, 2014

T3 ADD SEA T3 ADD SEA T3 ADD SEA T3 ADD SEA

**Tech Technician**

T3

Email

Time Off

Tech's Name: Bob Jones

Email Address: bobj@milstewart.net

Include on Dispatch Board: ☒

iPad ID: 081d989e8711b1ed  
(In ServiceCall, tap Tools / Dispatch Board for the ID)

Subscription Valid Until: Saturday, October 11, 2014 at 6pm

Okay Cancel

**Workload**

Date	Time	Tech	Sts	Customer	Details	Call #
Thu						

Tap each tech name on the board, and enter the correct the name and email address: the Dispatch Board will send new service calls, changes to calls, and emails to this address. If you wish to add another CC address in the Tech email then one important point to note is that multiple email addresses must be separated using semicolons, NOT commas.

**iPad ID:** if your tech has an iPad with mpengo ServiceCall, you can integrate Dispatch Board to ServiceCall by indicating a special ID code.

- Dispatches sent to these techs will receive a file attachment that when tapped will automatically - create new customers (if necessary) and place the call into ServiceCall.
- Edits in the Board and cancellations also are automatically sent and updated in ServiceCall.

## Here's how to get the ID code:



mpengo ServiceCall 3.0

Service Scheduler

M.L. Stewart Date: Jan 22 2014 Service Call #

**Tools**

Export Data to PC

Service Call lets you export a variety of data as tab-delimited files to your PC for further processing. Tap Export to select the information and date range desired.

Export

Synchronize iPads

Synchronize your customer file, notes, call history and rate/price tables with another iPad. Tap Sync, and email the data file to the other device; the email contains instructions how to merge the data.

Sync

Synchronize Settings

Copy your App Settings over to another iPad. Useful for setting up a new field iPad, or to ensure consistency.

Settings

Backup & Restore Data

ServiceCall lets you create a backup of your data, which you can also send to your PC for safekeeping. In the case of data loss, or if you change your device, you can restore your data to ServiceCall.

Backup & Restore

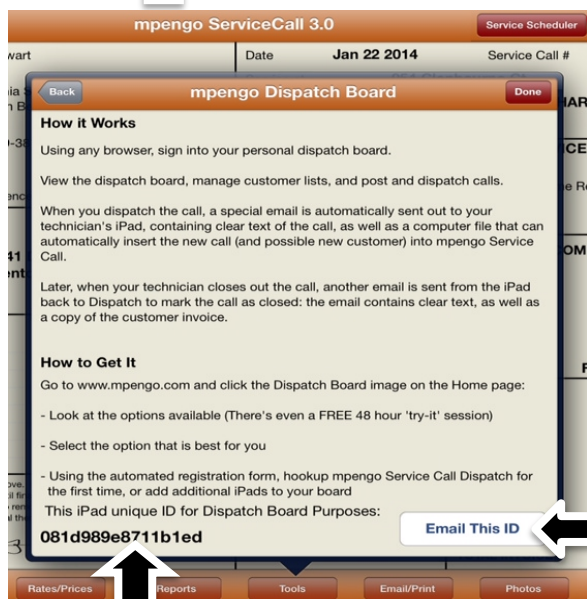
Import Tables from PC

Import a tab-delimited file from your PC into Service Call to automatically create or update your customer and rate/price lists. Tap Explain for instructions.

Explain

Interface with a Dispatch Board!

Go to mpengo ServiceCall on each iPad and tap **Tools / Interface with a Dispatch Board**.



mpengo ServiceCall 3.0

Service Scheduler

Wart Date: Jan 22 2014 Service Call #

**mpengo Dispatch Board**

**How it Works**

Using any browser, sign into your personal dispatch board.

View the dispatch board, manage customer lists, and post and dispatch calls.

When you dispatch the call, a special email is automatically sent out to your technician's iPad, containing clear text of the call, as well as a computer file that can automatically insert the new call (and possible new customer) into mpengo Service Call.

Later, when your technician closes out the call, another email is sent from the iPad back to Dispatch to mark the call as closed: the email contains clear text, as well as a copy of the customer invoice.

**How to Get It**

Go to [www.mpengo.com](http://www.mpengo.com) and click the Dispatch Board image on the Home page:

- Look at the options available (There's even a FREE 48 hour 'try-it' session)
- Select the option that is best for you
- Using the automated registration form, hookup mpengo Service Call Dispatch for the first time, or add additional iPads to your board

This iPad unique ID for Dispatch Board Purposes:

081d989e8711b1ed

Email This ID

At the bottom of the window, you'll see the iPad ID code specific to this device.

To make it easier to enter in Tech Settings, you can tap **'Email this ID'** and email it to your PC: then just copy and paste into your tech.

## Other Tech features:

The screenshot shows a 'Service Technician' window with a 'Tech ID' field set to 'T3'. A 'Time Off' dialog box is open, allowing a technician to schedule time off. The dialog includes fields for 'Start date' (Fri, Feb 21, 2014), 'End date' (Fri, Feb 21, 2014), 'Start time', 'End time', and a 'Comments' text area. Below these fields are 'Okay' and 'Cancel' buttons. At the bottom of the dialog, a table titled 'Scheduled Time Off' is shown, which is currently empty. A message below the table states: 'Technician has not scheduled any time off.'

- **Email** – lets you send a quick note via traditional email without having to exit the Dispatch Board and go to your mail program, and already knows the tech's proper email address.

- **Time Off** – lets you book off a tech for a specific period(s), so that you (e.g.) know that Lillian is not available for calls Thurs morning.

## Customers:

Click Search



The screenshot shows the 'Customers' window with a 'Customer Search' section. A search bar contains the text 'mpengo'. Below the search bar are three input fields labeled 'First Name', 'Last Name', and 'Company Name'. A magnifying glass icon is next to the search bar.

To select an existing customer (or search), enter a few characters of the customer name, or address, or phone number and click search.

The screenshot shows the 'Customers' window with a form to add a new customer. The form includes fields for 'First Name' (Bill), 'Last Name' (Jones), 'Company Name', 'Address' (4356 Fern Ave, West Palm Beach, FL 33409), 'Phone Number(s)' (888-234-5555), 'Email Address', 'Contact', 'Customer Reference', 'Default Service Tech', and 'Installed Equipment'. At the bottom are 'Okay', 'Delete', and 'Cancel' buttons. A 'Call History' section is visible at the very bottom.

To add a new customer - enter pertinent details, and click OK. (**Note:** you will also be able to view Call history in the Customer file).

You can also import a customer list from another database. Click Tools/Import Customers for instructions.

# General Flow (Taking a Call / Dispatching / Parking)

**mpengo Dispatch Board - M.L. Stewart**

**Annotations:**

- Tap date to access Calendar
- Refresh
- Tap to jump to Today's Date
- Tap for previous days
- Tap for 1, 5 or 7 day
- Tap to advance days
- Tap > to scroll to
- Tap Tech ID to access Tech name, email address, iPad ID, Tech time off
- Tap Help for tips, news & Support
- Legend: color chart for calls on the Board
- Edit parked call

**DB-Actions**

- Take New Call & Park It
- View Future Calls
- Maintenance
- Customers
- Settings
- Logout
- Service Scheduler
- Reports
- Tools
- Help
- Legend

**Legend:**

- Dispatched Calls
- Open Calls
- Completed Calls
- Tech Time Off
- Quote-only

**Parked Calls**

Svc Date	Svc Time	Booking Date	Customer	Contact	Service At	Service Call Details
						Use the Parked Calls area as an intermediate holding spot to move calls around.
		Tue Apr 1	Francine Bailey		645 Collins Rd West Palm Beach, FL	Air not working properly
		Tue Apr 1	Helen Adams			Check Coils in Air conditioner
						Use the Parked Calls area as an intermediate holding spot to move calls around.

- Pick the date: across the top (left to right), you have buttons for: Previous Day, Refresh the Board, Calendar selection, 'Today', Day View and Next Day. **Note:** click the **"Day View"** button to switch between 1 day, 5 day and 7 day views.

- To take a call, click the cell below the appropriate tech and across from the desired starting time. If you don't know where to place the call yet or are too busy, you can simply click (from the left menu) **'Take New Call & Park It'** to record the call and put it into the Parked Calls area.

- Enter the info needed for the call:
- To select an existing customer (or search), enter a few characters of the customer name, or address, or phone number and click search.
- Click '+' to add a new customer on the fly.
- Confirm service location, preferred time, and service requested.
- Confirm starting and ending times.
- **Note:** Service call history for this customer is also visible at the bottom of the call screen.

Once entered, click:

- **Park the Call** to save in Parked Calls. Later, you can move the call to the correct tech / date & time.
- **Save Call / Changes** to save as an Open, Un-Dispatched call.
- **Dispatch the Call** to save any changes and dispatch the call.

**Service Call Details**

Service Call #: Automatic

Customer Search: [Search Icon]

Contact Name / Order #: [Text Field]

Service Location: [Text Field]

Preferred Time: [Text Field]

Source of call: [Text Field]

Service Requested: [Text Field]

Work Performed: [Text Field]

Service Tech: ADDAM

Date of Service: Sat, Feb 22, 2014

Starting: 10:30am

Ending: 11:00am

Date Call Taken: [Text Field]

Time Call Taken: [Text Field]

Date Dispatched: [Text Field]

Time Dispatched: [Text Field]

Status:
 

- ☒ Open
- ☐ Dispatched
- ☐ Completed
- ☐ Parked
- ☐ Quote-only

Cancel Service Call | Park the Call | Save Call / Changes | Dispatch the Call | Call Completed

**Call History**

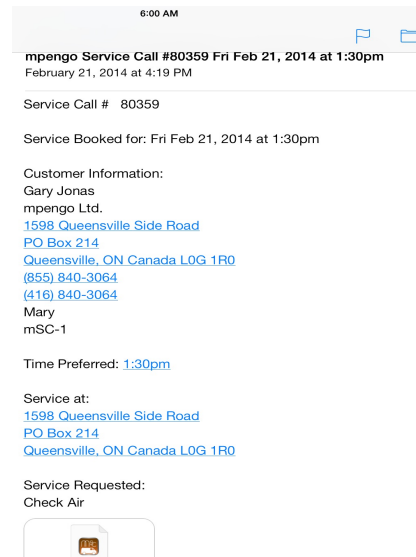
Date	Time	Tech	Sts	Details	Call #
------	------	------	-----	---------	--------

## Dispatching an Open Call:

- Click the open call; check for accuracy and click **'Dispatch the Call'**.

An email will automatically be sent to the tech with the customer and call information. If this tech also has mpengo ServiceCall, there will be a file attachment with the data to automatically update the app: just tap and hold the file attachment icon, and then tap **'Open in ServiceCall'**. When the Tech opens the call in ServiceCall it will import the details into ServiceCall and create a calendar event in the iPad Calendar.

## Sample Email for a Dispatched Call:



## Editing a Call:

- Click the call, make the changes, and click **'Save Call / Changes'** (if a call has already been dispatched then another email will be sent to the tech that includes the edited information).

## Cancel Service Call:

- Click on the Dispatched Call and select **'Cancel ServiceCall'**. The Tech will receive the email, open it in ServiceCall, and the calendar event will be removed and the call cancelled.

## Moving a Call / Explanation of the 'Parked Calls' area:

Some browsers don't work well with 'click', 'grab' and 'move' functions, so we implemented a 'Parked Calls' area for moving calls around. The 'Parked Calls' area is also useful to act as a spot to quickly take a new call if you are extremely busy and need to temporarily store it: then, when you have more time, you can move it to the correct tech / time slot.

Generally, to move a call to the appropriate tech and time slot:

- Click to highlight the call in the Parked Calls area
- Find the spot on the Board to move it to, and click that spot
- Now click **Save** (to save as an open, un-dispatched call), or **'Dispatch'** to save and also dispatch to the tech (If previously dispatched, the original tech will receive a cancellation notice).

	12:00pm
80360	12:30pm
Bob Jones: 80360 Gary Jonas mpengo Ltd. (Mary) Heat not working. Check thermostat also.	
	02:00pm

**TIP:** When viewing the Board you can **'Hover'** over an appointment block to view the details of the appointment.



## PLEASE NOTE:

When you send your first call to the Techs you will see a message pop up for:

### Email Address confirmation required:

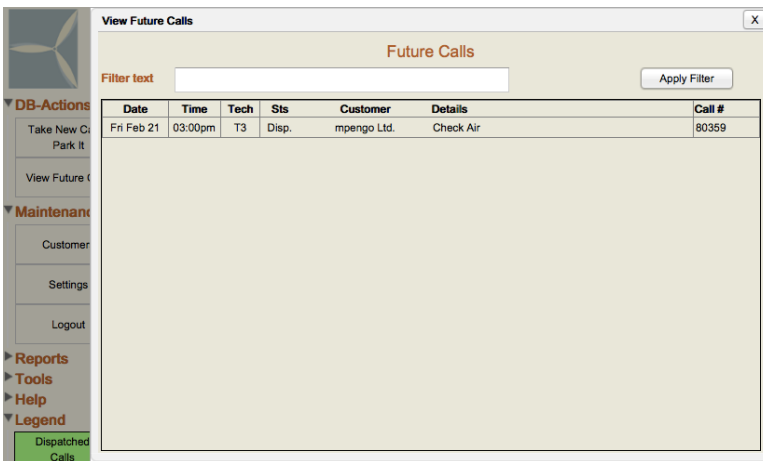
*"We have found one or more new email addresses (email address).*

*In order to ensure uninterrupted operation of your Dispatch Board these addresses must be acknowledged since incorrect or even misspelled email addresses will be rejected by internet mail servers, and retry attempts will eventually result in your Dispatch Board being shut down permanently (by outside Internet Service Providers, not mpengo)!*

*An email has been sent to each of these addresses containing a link that will confirm these are valid and active email accounts."*

Once the Tech has tapped on the link in the email and confirmed the email address, a message will be displayed stating the email address has been added to the **"mpengo Dispatch Board White List"**.

Any address that has **NOT** been acknowledged can be used for a **maximum of four calls**. All calls after that will remain as **OPEN (yellow)**, on the Board and will have to be **re-dispatched** once the Tech's have confirmed their email address.



Date	Time	Tech	Sts	Customer	Details	Call #
Fri Feb 21	03:00pm	T3	Disp.	mpengo Ltd.	Check Air	80359

### View Future Calls

This report allows to you to view all your future calls and also the ability to apply a filter to view specific calls.

# Service Scheduler

The new Service Scheduler feature provides the ability to effectively manage Service Maintenance Contracts.

The Scheduler allows you to set up one or more 'visits' at the start of a contract/maintenance agreement, and then schedule calls on a monthly basis based on the current availability of your Tech's.

Some of the features include:

- Assigning a preferred Tech to a contract
- Allocating appointments in the Morning, the Afternoon or Anytime of day
- Limiting the number of appointments assigned to a Tech on a given day
- Specifying a range of dates for the appointment to be booked
- Automatically generating repeat visits or renewing a contract for another year
- Generating an email to the customer with the appointment details when it is booked

**Service Schedules:** Tap the **Service Schedules** button on the main screen.

- **Service Schedule #:** Tap [+] to create a new schedule or tap the search button to select an existing schedule to edit. You can also enter a few characters followed by the search button to narrow the search list down.
- **Customer Search:** To select an existing customer (or search), enter a few characters of the customer name, or address, or phone number and click search. Click [+] to add a new customer on the fly.
- **Preferred Service Tech:** Enter Tech Name or ID.
- **First Visit:** Select the month and year for the first visit.
- **Length of Call:** This is only a default and can be changed here for this schedule.
- **Number of Visits:** Enter # of Visits (1-12).
- **Service Requested:** Enter the Service Requested.
- **Contract Name/Order #:** Enter an optional Contract/PO# which will be inserted in the Order No. or Name field in the ServiceCall.
- **Service Location:** Confirm location for service.
- **Preferred Time:** Select Anytime, Morning (before 12:00) or Afternoon (after 1:30).
- **Contract Value:** Enter the amount of the total contract if applicable.

## Other buttons:

- **Okay:** Saves the schedule without creating the visits.
- **Save & Add a Visit:** Saves the information and takes you to the screen to create the visits.
- **Delete Entire Schedule:** Deletes the complete schedule of visits. If any have been created and are on the Dispatch Board then those must be cancelled manually by tapping on each one and cancelling the call.
- **Cancel Open Visits:** Cancels any Open (Unscheduled) Visits (that have not been created on the board).
- **Renew Schedule for the Next Year:** Renewing a Schedule will create a copy of the current information and advance it forward one year.
- **Cancel:** exits without saving.



Once all the information for the schedule is entered, tap **Save & Add a Visit** to create the visits.

- **Date:** Confirm the month and date for the first visit.
  - **Between days:** Select the range of days (1-31)
  - **Special Note:** Information entered here will appear in the Service Requested section of mpengo ServiceCall. It will also be entered on any subsequent visits you have created when you tap the Repeat button.
- Note:** You may want to enter information about the contract and whether the Tech is to bill for this visit. Remember this also appears on the ServiceCall the Tech sends or prints for the customer.
- **Repeat:** If this is the first visit created and you have 2, 3, 4, 6, or 12 visits, you can create the remaining visits in just one step by tapping 'Repeat'.

Tap **OKAY** to create the scheduled visits or **CANCEL** to exit without creating the visits.

Visit	Year	Month	From	To	Notes	Call #	Date	Time	
1	2014	April	15	25	Call before coming				Edit
2	2014	July	15	25	Call before coming				Edit
3	2014	October	15	25	Call before coming				Edit
4	2015	January	15	25	Call before coming				Edit

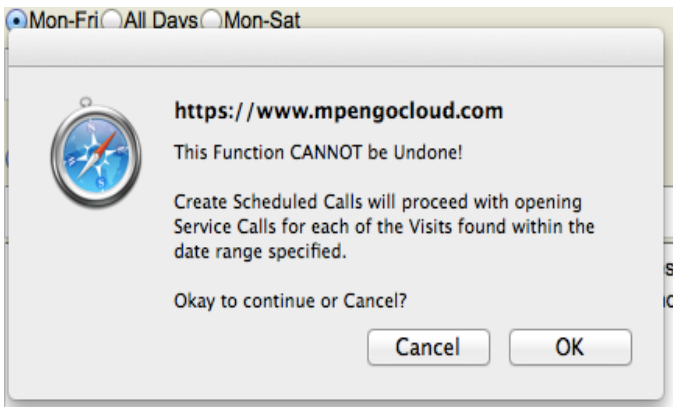
Now the Visit has been created and if you had selected **'Repeat'** on the previous screen you would see multiple visits displayed.

**NOTE:** Once the call has been generated for that visit in the 'Create Scheduled Calls' screen you will see the call number displayed in Call # field along with the date and time.

**Create Scheduled Calls:** Tap 'Create Scheduled Calls' to create your visits on the Dispatch Board. We suggest you run a 'List of Scheduled Visits' first to review calls that will be created.

- Set your **Working Days**: Mon-Fri, All Days or Mon-Sat
- Select **Maximum Number of Calls per Tech per Day** (1-8)
- Choose whether you wish to **Prepare Email to send to Customers**. If you choose to send an email then one will be created for each customer that has an email address in his or her customer file.
- Enter the **Subject Line for Email Message** if different than the default provided.
- Enter the **Message text** to precede the call details in the email message if you prefer something different than the default provided.
- The **Message Signature** pulls the information from your Company Information screen. This can be modified in this screen.
- Enter the **Start and End dates** for the calls you want to schedule.

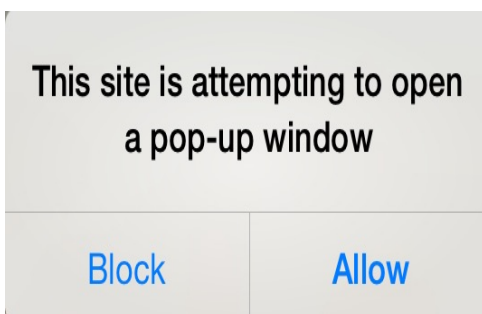
**Note:** Your choices and information entered above will all be retained as your default settings for the next time with the exception of the Start and End dates.



- When you tap **Schedule Calls** you will be presented with a **Warning Message** that This Function **CANNOT** be Undone. Press **OK** to continue or **Cancel** to exit without creating the calls.

- When you tap **OK** the software will attempt to create calls on the Board for each visit that can be scheduled during the date range you picked.

**Note:** The calls are created on the Board with a prefix of **SS** before the call number denoting a call created by Service Schedule. These calls are placed on the Board as **OPEN** calls and still need to be dispatched.



When you tap **OK** you may be presented with this message stating, 'This site is attempting to open a pop-up window', tap **Allow**. You will then be taken to your email window with the email message that is to be sent to your Customer. A separate email will pop up for each call created and for you to press **Send** for each email.

These emails are being sent from your own default email address.

Once all emails are sent you will need to exit the pop-up screen and go back into the Dispatch Board. This will bring you to the following screen with the list of any calls that were created.

Thank you,

**Message Signature (following call details):**  
M.L. Stewart  
P.O. Box 3425  
West Palm Beach, FL 33401  
888-555-1212  
www.mpengo.com

**Start date** Wed, Oct 1, 2014  
**End date** Fri, Oct 31, 2014

Schedule Calls Print Email Cancel

**Create Scheduled Calls Report from Wed Oct 1/14 to Fri Oct 31/14**

Sched#	Visit#	Date	Time	Tech	Call#	Customer	Email	Contract / PO	Service Req'd / Notes
SS000001	3	Wed Oct 1	07:00	ADDAM	80431	Bridges Inc.	maryl@mlstewart.net	Harry	Check air and clean. Perform quarterly maintenance.
SS000002	4	Wed Oct 1	07:30	ADDAM	80432	Jake Jorz	maryl@mlstewart.net	Jake	Maintenance remember to call before coming check air
SS000004	2	Wed Oct 1	07:00	T3	80433	Terry Almond	mlstewart@msn.com		

- Tap **Print** to print a list of all calls created.
- Tap **Email** to email the list to the default email in your Settings.
- Tap the **X** in the upper right corner to exit this screen and return to the Board.
- Once returned to the Board you can then Dispatch any calls that have been created.

## List of Scheduled Visits

List of Scheduled Visits

**Start date** Tue, Apr 1, 2014  
**End date** Wed, Apr 30, 2014

**Types of Visits to include on the report**  
☒ All Visits in the Scheduler  
☐ Scheduled Calls Only  
☐ Open (Unscheduled) Visits Only

Okay Cancel

Enter starting and ending dates then press Okay to display the details.

- Enter the **Start and End date** for the report.
- Select the Type of Visits to Include on the Report:

- All Visits in the Scheduler
- Scheduled Calls Only
- Open (Unscheduled) Visits Only

Tap **Okay** to display the results

List of Scheduled Visits

**Start date** Wed, Apr 2, 2014  
**End date** Wed, Apr 30, 2014

**Types of Visits to include on the report**  
☒ All Visits in the Scheduler  
☐ Scheduled Calls Only  
☐ Open (Unscheduled) Visits Only

Okay Print Email Cancel

**List of Scheduled Visits from Wed Apr 2/14 to Wed Apr 30/14**

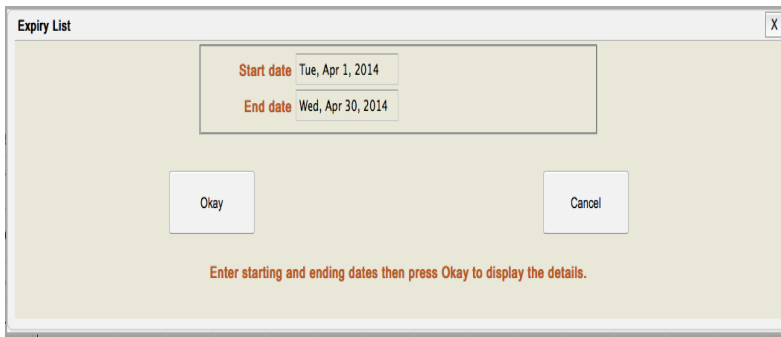
Sched#	Date	Time	Call#	Customer	Email	Contract / PO	Service Requested	Special Note	Tech	Projected Revenue
SS000001	Tue Apr 1	07:00	Cancelled	Bridges Inc.	maryl@mlstewart.net	Harry	Check air and clean. Perform quarterly maintenance.			0.00
SS000002	Tue Apr 1	08:00	80385	Jake Jorz	maryl@mlstewart.net	Jake	Maintenance	remember to call before coming	T3	166.67
SS000004	Wed Apr 2	07:00	Cancelled	Terry Almond	mlstewart@msn.com		check air		T3	0.00
SS000005	Wed Apr 2	07:30	Cancelled	Marilyn Audsley	mlstewart@msn.com		check		T3	150.00
SS000007	Tue Apr 1	09:00	Cancelled	H&R Block	mlstewart@msn.com	Garilyn Green	Air Service & Filter changed monthly	Call Mary 561.234-1245 before	ADDAM	100.00

The Report includes:

- Sched#
- Date and Time
- Call#
- Customer
- Email
- Contract/PO
- Service Requested
- Special Note
- Tech
- Projected Revenue

These reports can also be printed or emailed.

## Expiry List



Expiry List

Start date: Tue, Apr 1, 2014

End date: Wed, Apr 30, 2014

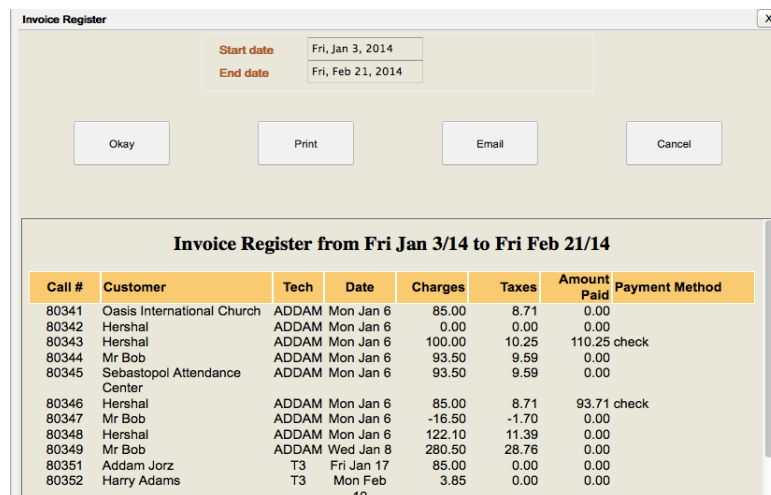
Okay Cancel

Enter starting and ending dates then press Okay to display the details.

- Enter the **Start and End dates** for your report.
- Tap **Okay** to display schedules deemed 'expired' if the last visit occurs during the date range specified.

## Reports:

### Invoice Register:



Invoice Register

Start date: Fri, Jan 3, 2014

End date: Fri, Feb 21, 2014

Okay Print Email Cancel

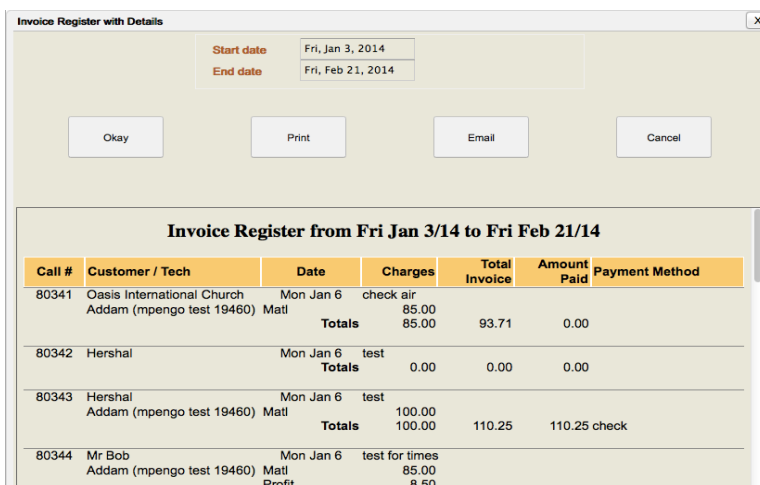
**Invoice Register from Fri Jan 3/14 to Fri Feb 21/14**

Call #	Customer	Tech	Date	Charges	Taxes	Amount Paid	Payment Method
80341	Oasis International Church	ADDAM	Mon Jan 6	85.00	8.71	0.00	
80342	Hershal	ADDAM	Mon Jan 6	0.00	0.00	0.00	
80343	Hershal	ADDAM	Mon Jan 6	100.00	10.25	110.25	check
80344	Mr Bob	ADDAM	Mon Jan 6	93.50	9.59	0.00	
80345	Sebastopol Attendance Center	ADDAM	Mon Jan 6	93.50	9.59	0.00	
80346	Hershal	ADDAM	Mon Jan 6	85.00	8.71	93.71	check
80347	Mr Bob	ADDAM	Mon Jan 6	-16.50	-1.70	0.00	
80348	Hershal	ADDAM	Mon Jan 6	122.10	11.39	0.00	
80349	Mr Bob	ADDAM	Wed Jan 8	280.50	28.76	0.00	
80351	Addam Jorz	T3	Fri Jan 17	85.00	0.00	0.00	
80352	Harry Adams	T3	Mon Feb 10	3.85	0.00	0.00	

This report includes Call #, Customer, Tech, Date, Total Charges, Taxes, amount and Payment Method. Source of Call Information will also be included if the option is checked.

- Enter the starting and ending dates
- Select the option to Include Source of Call Information if applicable.
- Click okay to view.
- Select Print, Email or Cancel

### Invoice Register with details:



Invoice Register with Details

Start date: Fri, Jan 3, 2014

End date: Fri, Feb 21, 2014

Okay Print Email Cancel

**Invoice Register from Fri Jan 3/14 to Fri Feb 21/14**

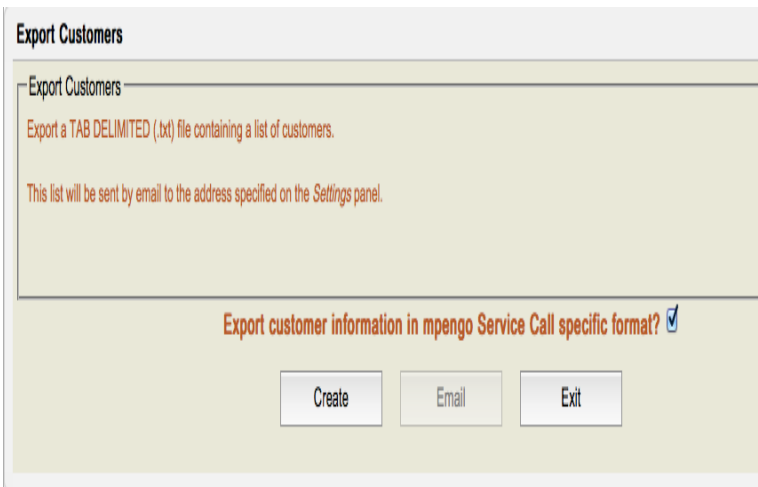
Call #	Customer / Tech	Date	Charges	Total Invoice	Amount Paid	Payment Method
80341	Oasis International Church	Mon Jan 6	check air	85.00		
	Addam (mpengo test 19460) Matt			85.00		
	<b>Totals</b>			93.71	0.00	
80342	Hershal	Mon Jan 6	test	0.00	0.00	
	<b>Totals</b>			0.00	0.00	
80343	Hershal	Mon Jan 6	test	100.00		
	Addam (mpengo test 19460) Matt			100.00		
	<b>Totals</b>			110.25	110.25	check
80344	Mr Bob	Mon Jan 6	test for times	85.00		
	Addam (mpengo test 19460) Matt			8.50		
	Profit					

Breaks down the individual charges on the report. Source of Call Information will also be included if the option is checked.

- Enter the starting and ending dates
- Select the option to Include Source of Call Information if applicable.
- Click okay to view.
- Select Print, Email or Cancel

## Tools:

### Export Customers:



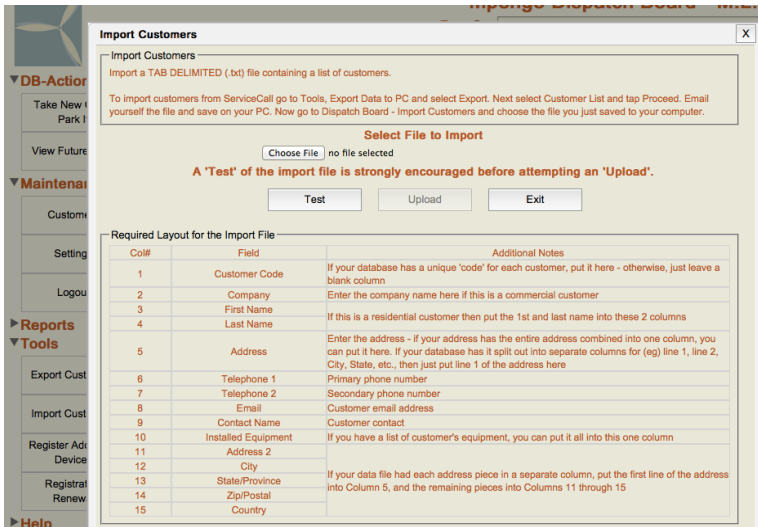
Export a TAB DELIMITED (.txt) file containing a list of customers.

The box for “Export customer information in mpengo Service Call specific format?” is checked by default. Leave this checked if you plan on using the file to import into mpengo ServiceCall.

- Tap create to view the list
- Tap email.

**Note:** This list will be sent by email to the address specified on the Settings panel.

### Import Customers:



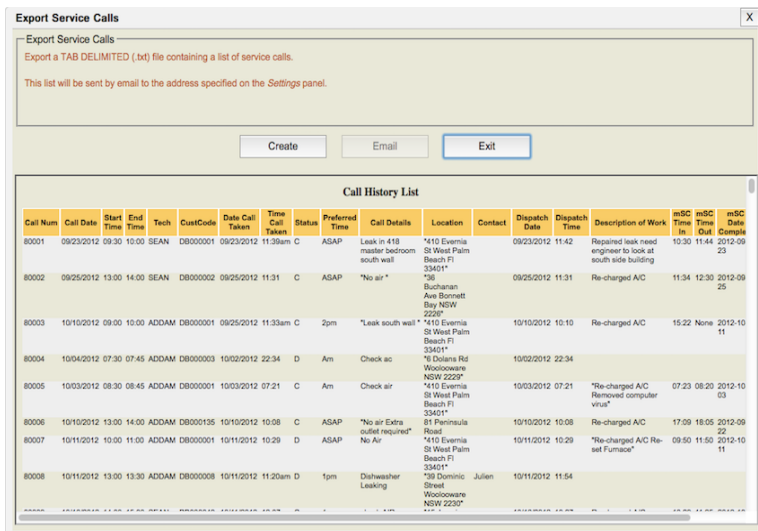
Col#	Field	Additional Notes
1	Customer Code	If your database has a unique 'code' for each customer, put it here - otherwise, just leave a blank column
2	Company	Enter the company name here if this is a commercial customer
3	First Name	
4	Last Name	If this is a residential customer then put the 1st and last name into these 2 columns
5	Address	Enter the address - if your address has the entire address combined into one column, you can put it here. If your database has it split out into separate columns for (eg) line 1, line 2, City, State, etc., then just put line 1 of the address here
6	Telephone 1	Primary phone number
7	Telephone 2	Secondary phone number
8	Email	Customer email address
9	Contact Name	Customer contact
10	Installed Equipment	If you have a list of customer's equipment, you can put it all into this one column
11	Address 2	
12	City	
13	State/Province	If your data file had each address piece in a separate column, put the first line of the address into Column 5, and the remaining pieces into Columns 11 through 15
14	Zip/Postal	
15	Country	

Import a TAB DELIMITED (.txt) file containing a list of customers.

To import customers from ServiceCall go to Tools, Export Data to PC and select Export. Next select Customer List and tap Proceed. Email yourself the file and save on your PC. Now go to Dispatch Board - Import Customers and choose the file you just saved to your computer. Click Test to view any problems with the file. If no problems are found then click update.

**Note:** A 'Test' of the import file is strongly encouraged before attempting and Upload'.

### Export Call History:



Call Num	Call Date	Start Time	End Time	Tech	CustCode	Date Call Taken	Time Call Taken	Status	Preferred Time	Call Details	Location	Contact	Dispatch Date	Dispatch Time	Description of Work	mSC In	mSC Out	mSC Date	mSC Time
80001	09/23/2012	09:30	10:00	SEAN	DB000001	09/23/2012	11:35am	C	ASAP	Leak in 4th master bedroom south wall	*10 Evernia St West Palm Beach FL 33411		09/23/2012	11:42	Repaired leak need engineer to look at south side building	10:30	11:44	2012-09	23
80002	09/25/2012	13:00	14:00	SEAN	DB000002	09/25/2012	11:31	C	ASAP	"No air"	Buchanan Ave Bonnett Bay NSW 2220		09/25/2012	11:31	Re-charged A/C	11:34	12:30	2012-09	25
80003	10/10/2012	09:00	10:00	ADDAM	DB000001	09/25/2012	11:33am	C	2pm	"Leak south wall"	*10 Evernia St West Palm Beach FL 33411		10/10/2012	10:10	Re-charged A/C	15:22	None	2012-10	11
80004	10/04/2012	07:30	07:45	ADDAM	DB000003	10/02/2012	22:34	D	Am	Check ac	*10 Dolans Rd Woodoware NSW 2220		10/02/2012	22:34					
80005	10/03/2012	08:30	08:45	ADDAM	DB000001	10/03/2012	07:21	C	Am	Check air	*10 Evernia St West Palm Beach FL 33411		10/03/2012	07:21	"Re-charged A/C Removed computer virus"	07:23	08:20	2012-10	03
80006	10/10/2012	13:00	14:00	ADDAM	DB000135	10/10/2012	10:08	C	ASAP	"No air Extra outlet required"	81 Peninsula Road		10/10/2012	10:08	Re-charged A/C	17:09	18:05	2012-09	22
80007	10/11/2012	10:00	11:00	ADDAM	DB000001	10/11/2012	10:29	D	ASAP	No Air	*10 Evernia St West Palm Beach FL 33411		10/11/2012	10:29	"Re-charged A/C Re-set Furnace"	09:50	11:50	2012-10	11
80008	10/11/2012	13:00	13:30	ADDAM	DB000008	10/11/2012	11:20am	D	1pm	Dishwasher Leaking	*39 Dominic Street Woodoware NSW 2220	Julian	10/11/2012	11:54					

Tap Export Call History to download an HTML report and a tab-delimited text file of all call history that will also include Source of Call information if applicable. The text file can be imported into a spreadsheet such as Excel.

- Tap create to view the list
- Tap email



## Register additional devices (Techs):

**mpengo Dispatch Board Registration - Add more Techs to the Board!**

After completing the form below you will be transferred to a PayPal Web page to enter your payment information (we don't store ANY payment info). We will update your Dispatch Board with the additional Tech(s) provided below once PayPal sends confirmation to us. You will receive an email from us shortly after to confirm the additional Tech(s) have been added to your Dispatch Board.

Contact Information

\* Email Address

\* Note: The Email address you supply PayPal **MUST** match the Email address you've entered here, otherwise your registration will be delayed. Please contact our support group if your registration has not been processed within a few hours of submitting your PayPal payment.

Billing Information

Number of Tech's  You will be billed \$0.50 per Tech per Day (90 days).  
Number of Days  eg, 2 Techs on the Board for a 90 day period would be 0.50 x 2 x 90 = \$90.00

Service Tech Information

Tech Code	Tech's Name
1. T5	Tech #5

Follow the instructions to add additional Techs to Dispatch Board

**Please Note: The Email address you supply PayPal MUST match the Email address you've entered here, otherwise your registration will be delayed. Please contact our support group if your registration has not been processed within a few hours of submitting your PayPal payment.**

## Registration Renewal:

**mpengo Dispatch Board Registration Renewal**

After completing the form below you will be transferred to a PayPal Web page to enter your payment information (we don't store ANY payment info). We will update your Dispatch Board with the information provided below once PayPal sends confirmation to us. You will receive an email from us shortly after to confirm the new subscription information has been applied to your Dispatch Board.

Contact Information

\* Email Address

\* Note: The Email address you supply PayPal **MUST** match the Email address you've entered here, otherwise your registration will be delayed. Please contact our support group if your registration has not been processed within a few hours of submitting your PayPal payment.

Billing Information

Total Number of Days  You will be billed \$0.50 per Tech per Day and the Total Number of Days specified will be divided amongst all of your currently active Service Techs.  
Subscription Fee  e.g. If you want to renew your 2 Techs for another 90 days, you would indicate 180 days: the subscription fee would then be 180 x \$0.50 = \$90.00.

How It Works

The number of days selected for renewal will be evenly distributed amongst all of your Service Techs. If you previously had multiple techs with different subscription ending dates, your renewal will be adjusted slightly so that all tech subscriptions end on the same date, making it easier for next time.

Code	Tech Name	Current Expiration	# of Days	New Renewal Date
------	-----------	--------------------	-----------	------------------

The number of days selected for renewal will be evenly distributed amongst all of your Service Techs. If you previously had multiple techs with different subscription ending dates, your renewal will be adjusted slightly so that all tech subscriptions end on the same date, making it easier for next time.

**Please Note: The Email address you supply PayPal MUST match the Email address you've entered here, otherwise your registration will be delayed. Please contact our support group if your registration has not been processed within a few hours of submitting your PayPal payment.**

## Help

**Help**

Help and Tips

What's New / Notices

Email Support

**Help and Tips:** quick tips on how to start a new call edit a service tech and help on Parked Calls.

**What's New/Notices:** List of features recently added to Dispatch Board

**Email Support:** tap here to send questions or suggestions to our support staff



**Legend:** Below is a color chart for calls on the Board.



- **Dispatched Calls** (Green): Call has been dispatched to the Tech

- **Open Calls** (Yellow): Calls that have not yet been dispatched to the Tech.

- **Completed Calls** (Gray): Dispatched Call is closed by the Tech in ServiceCall and sent back to the Board.

- **Tech Time Off** (Lt. Blue): Tech has had time off scheduled. (The Time Off function is available by tapping on the Tech ID on the Board)

- **Quote Only** (Beige): This is a Closed Call but the type of call in ServiceCall has been changed to Quote Only and closed as such. A Quote Only call will not show any dollar amounts in the Invoice Registers and will say Quote Only.

The following is a list of fields that are updated when calls are sent from a Tech's iPad to the Dispatch Board:

- Contact Name /Order #
- Service Location
- Service Requested
- Work Performed
- Call Status (Completed Calls)
- Customer Name and address info

When a call that was originally dispatched from the board is cancelled by a Tech in the field, the call's status is changed to '**Completed**' and the phrase "**C A N C E L L E D**" is inserted into the Service Requested field.

Similarly, the phrase "**Q U O T E - O N L Y**" is inserted into the Service Requested field when a Tech closes a quote-only call.

The financial information about the call is also sent to the board in a summary format that is used to generate the Invoice Register and Detailed Invoice Register reports.

\*Calls are sent to the board when they're closed and the email is sent to the board, or when using the Tools/Upload to Dispatch Board option in mpengo ServiceCall.

\*If the email to the Board is cancelled by the tech, or for some reason does not reach the Board to update the call, there is an option in ServiceCall to resend a closed request. You can access this button under the call history for a given customer. Just click on the call and tap the 'Resend CLOSE to Board'.

Resend CLOSE  
to Board

**Note:** The **Upload to Dispatch Board** option in Tools does not close the call. This will simply update any of the fields above that have been changed by the Tech on-site and update the call on the board.

Interface with a Dispatch Board!

Upload To Dispatch Board

## Other Information:

The Dispatch Board is an on-going 'work in progress' as we add features suggested by our clients to make the Board better and more functional on a regular basis. If you have any suggestions of your own, drop us a line at [info@mpengo.com](mailto:info@mpengo.com), or click **Help / Support** to send a suggestion or query to [support@mpengo.com](mailto:support@mpengo.com).

Finally, let us know if there are any functions you'd like described in more detail in this guide, and we'll work to make it better!

**Happy mpengoiing!**