

Start the recording



Ascente Service Dispatch Technician Setup

Presenter: Mark Allman
February 2020

www.compusource.com

<http://www.servicecontractorsoftware.com/>



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Technician Setup

Overview

Technicians are required and used primarily in the Ascente Service Dispatch Module and Mobile Pro App. This presentation will outline the process necessary to setup a technician in Ascente and then for the Mobile Pro App.

I will not review every field in in detail for all forms. Utilize the Ascente [F1] Help for more detail assistance.



Technician Setup

Setup Steps and Requirements

1. Required Setup for Technician
 - Branch (*this is the Branch the tech works from*)
 - Location (*used for inventory tracking*)
 - Labor Grade (*used for Maintenance Tasking, defaults are provided*)
 - Service Order Types (*what service types can the tech perform*)
2. Technician
3. Employee (*required if timecard processing is done*)
4. Mobile Pro Technicians (*required Mobile Pro is used*)



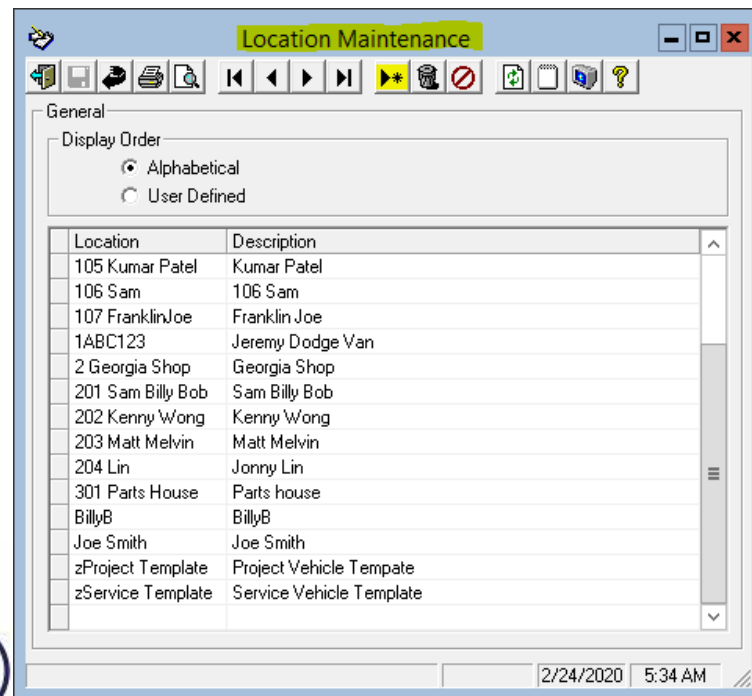
Technician Setup

Required Setup for Technician

Location

Ascente / Inventory / Maintenance / Location

This is required and will determine the inventory location used for inventory quantity tracking for the new technician. This can be a new record, or if using an old technician's truck, you can just change the *Location* and *Description* field.



Technician Setup

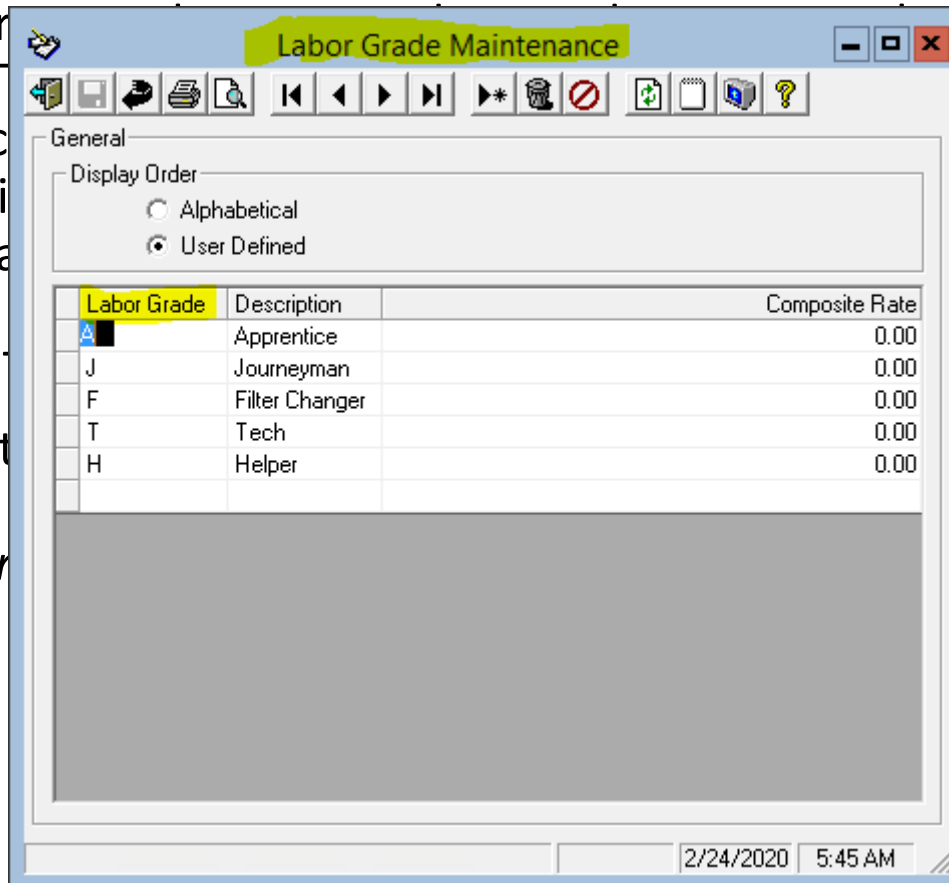
Required Setup for Technician

Labor Grade

Ascente / Service / Maintenance / Labor Grade

Labor Grades are determined by area and skill level. They determine which tasks can be installed on certain files at the Jobsite file and which labor grade is required for each task prior to adding tasks.

If you are not using the system to have at least one technician record



Technicians by area system to tasks or are set up in the labor grade list be set up

When asking, be sure to *en adding*

Technician Setup

Technician

Ascente / Service / Maintenance / Technician

The screenshot shows the 'Technician Maintenance' window for a technician named Alex. The 'Service' checkbox is checked, and a callout box explains its function. The interface includes fields for Name, Branch, Zone, Location, Labor Grade, Supervisor, Message Protocol, Phone Number, Cell Carrier, and Email. There is also a 'Mobile' section with fields for Mobile User, Vendor Class, Next PO Number, and Email Timecard To. A list of services with checkboxes is visible on the right side of the window.

Service
Check this box if this technician is allowed to take service calls. If this box is not checked, the service program will not allow this tech to be entered on a service call, assigned to a job site, or be dispatched to a call. Also, this tech will not display in drop boxes or on the Dispatch screen. If this technician has been terminated, or if this is an employee who has a cell phone but does not do service calls, this box should be unchecked.

Service	Checked
Heating	
Maint - Billing	
Maintenance	
Plumbing	<input checked="" type="checkbox"/>
Quote	<input checked="" type="checkbox"/>

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Technician Setup

Technician

Ascente / Service / Maintenance / Technician

Technician Maintenance

Technician

General | Tech Log | Scheduling

Technician

Name

Service

Branch

Zone

Location

Labor Grade

Supervisor

Message Protocol

Phone Number

Cell Carrier

Email

Mobile

Mobile User Vendor Class

Next PO Number

Email Timecard To

Service Order Types

Assign All Types

Air Conditioning

Maint - Plumbing

Maintenance

Plumbing

Quote

Commission Percentage

Branch
Select the branch for this technician.
Branches are setup in the Branch
maintenance program. *(Required Field)*

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Technician Setup

Technician

Ascente / Service / Maintenance / Technician

Technician Maintenance

Technician: Alex

General | Tech Log | Scheduling

Technician

Name: Alex Smith

Service:

Branch: California

Zone: Orange County

Location: 108 Alex Smith

Labor Grade: T

Supervisor: Mark

Message Protocol: Email

Phone Number:

Cell Carrier: AT&T

Email: test@compusource.com

Mobile

Mobile User: Vendor Class: PLMB Plumbing

Next PO Number: AS00001

Email Timecard To: mk.allman@compusource.com

Service Order Types

Assign All Types

Air Conditioning

Heating

Maintenance

Plumbing

Quote

Commission Percentage

100

Location
Select the inventory location for this technician. The location ID defines the parts warehouse and point of inventory for a technician. *(Required Field)*

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Technician Setup

Technician

Ascente / Service / Maintenance / Technician

The screenshot shows the 'Technician Maintenance' window. The 'Technician' field is set to 'Alex'. The 'General' tab is active, showing the following fields:

- Name: Alex Smith
- Service:
- Branch: California
- Zone: Orange County
- Location: 108 Alex Smith
- Labor Grade: T
- Supervisor: Mark
- Message Protocol: Email
- Phone Number: (empty)
- Cell Carrier: AT&T
- Email: test@compusource.com

The 'Service Order Types' table is also visible:

Service Order Type	Assigned
Air Conditioning	<input checked="" type="checkbox"/>
Heating	<input type="checkbox"/>
Maint - Billing	<input type="checkbox"/>
Maintenance	<input type="checkbox"/>
Plumbing	<input type="checkbox"/>

The 'Commission Percentage' table is also visible:

Bill Type	Comm %
Labor	20.00

A callout box points to the 'Labor Grade' field with the following text:

Labor Grade
Select the labor grade for this technician. Labor grades are setup in the Labor Grade maintenance program.
(Required Field)

At the bottom of the window, the status bar shows 'Changed: sa', the date '2/24/2020', and the time '6:37 AM'.

Technician Setup

Technician

Ascente / Service / Maintenance / Technician

Technician Maintenance

Technician: Alex

General | Tech Log | Scheduling

Technician

Name: Alex Smith

Service:

Branch: California

Zone: Orange County

Location: 108 Alex Smith

Labor Grade: T

Supervisor: Mark

Message Protocol: Email

Phone Number:

Cell Carrier: AT&T

Email: test@compusource.com

Mobile

Mobile User: Vendor Class: PLMB Plumbing

Next PO Number: AS00001

Email Timecard To: mk.allman@compusource.com

Message Protocol
This can be set to one of the following:

- *(None)* Messaging will not be available for this Technician
- *Email* Messages will be sent via Email using the Email address set up for the Technician
- *Text* Messages will be sent via Text using the Phone Number and Cell Carrier set up for the Technician
- *TeleTrac* Messages will be sent to the TeleTrac display unit in the vehicle. This requires the Ascente GPS Interface

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Technician Setup

Technician

Ascente / Service / Maintenance / Technician

Technician Maintenance

Technician: Alex

General | Tech Log | Scheduling

Technician

Name: Alex Smith

Service:

Branch: California

Zone: Orange County

Location: 108 Alex Smith

Labor Grade: T

Supervisor: Mark

Message Protocol: Email

Phone Number:

Cell Carrier: AT&T

Email: test@compusource.com

Mobile

Mobile User: Vendor Class: PLMB Plumbing

Next PO Number: AS00001

Email Timecard To: mk.allman@compusource.com

Service Order Types

Assign All Types:

	Assigned
Air Conditioning	<input checked="" type="checkbox"/>
Heating	<input checked="" type="checkbox"/>
Maint - Billing	<input checked="" type="checkbox"/>

Commission Percentage

Bill Type	Comm %
Labor	20.00
Material	5.00

Phone Number
Enter the 10-digit phone number for this technician. This is required if you will be sending messages via Text. Otherwise this can be entered just as a reference.

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Technician Setup

Technician

Ascente / Service / Maintenance / Technician

Technician Maintenance

Technician Alex

General | Tech Log | Scheduling

Technician

Name Alex Smith

Service

Branch California

Zone Orange County

Location 108 Alex Smith

Labor Grade T

Supervisor Mark

Message Protocol Email

Phone Number

Cell Carrier AT&T

Email test@compusource.com

Service Order Types

Assign All Types

	Assigned
Air Conditioning	<input checked="" type="checkbox"/>
Heating	<input checked="" type="checkbox"/>
Maint - Billing	<input checked="" type="checkbox"/>

Commission Percentage

Bill Type	Comm %
Labor	20.00
Material	5.00

Mobile

Mobile User Vendor Class PLMB Plumbing

Next PO Number AS00001

Email Timecard To mk.allman@compusource.com

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E-mail
Enter the email address for this technician. This field will be required if the Message Protocol selected is Email.
NOTE: If using Ascente Mobile Pro this email address must match **exactly** to the email address set up in the Mobile Pro Administration tool.

Technician Setup

Technician

Ascente / Service / Maintenance / Technician

Technician Maintenance

Technician Alex

General | Tech Log | Scheduling

Technician

Name: Alex Smith

Service:

Branch: California

Zone: Orange County

Location: 108 Alex Smith

Labor Grade: T

Supervisor: Mark

Message Protocol: Email

Phone Number:

Cell Carrier: AT&T

Email: test@compusource.com

Service Order Types

Assign All Types:

	Assigned
Air Conditioning	<input checked="" type="checkbox"/>
Heating	<input checked="" type="checkbox"/>
Maint - Billing	<input checked="" type="checkbox"/>
Maintenance	<input checked="" type="checkbox"/>

Commission Percentage

Bill Type	Comm %
Labor	20.00
Material	5.00

Mobile

Mobile User: Vendor Class: PLMB Plumbing

Next PO Number: AS00001

Email Timecard To: mk.allman@compusource.com

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Technician Setup

Technician

Ascente / Service / Maintenance / Technician

Technician Maintenance

Technician: Alex

General | Tech Log | Scheduling

Technician

Name: Alex Smith

Service:

Branch: California

Zone: Orange County

Location: 108 Alex Smith

Labor Grade: T

Supervisor: Mark

Message Protocol: Email

Phone Number:

Cell Carrier: AT&T

Email: test@compusource.com

Service Order Types

Assign All Types:

	Assigned
Air Conditioning	<input checked="" type="checkbox"/>
Heating	<input checked="" type="checkbox"/>
Maint - Billing	<input checked="" type="checkbox"/>
Maintenance	<input checked="" type="checkbox"/>

Commission Percentage

Bill Type	Comm %
Labor	20.00
Material	5.00

Mobile

Mobile User: Vendor Class: PLMB Plumbing

Next PO Number: AS00001

Email Timecard To: mk.allman@compusource.com

Vendor Class
This field is only enabled if the Mobile User box is checked. When the displayed Technician downloads the Vendor List to his Mobile Pro unit the system will only select Vendors whose Vendor Class matches this value. This way you can limit the list to just valid suppliers that the Technician will use.

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Technician Setup

Technician

Ascente / Service / Maintenance / Technician

Technician Maintenance

Technician Alex

General | Tech Log | Scheduling

Technician

Name: Alex Smith

Service:

Branch: California

Zone: Orange County

Location: 108 Alex Smith

Labor Grade: T

Supervisor: Mark

Message Protocol: Email

Phone Number:

Cell Carrier: AT&T

Email: test@compusource.com

Mobile

Mobile User: Vendor Class: Plumbing

Next PO Number: AS00001

Email Timecard To: mk.allman@compusource.com

Service Order Types

Assign All Types:

	Assigned
Air Conditioning	<input checked="" type="checkbox"/>
Heating	<input checked="" type="checkbox"/>
Maint - Billing	<input checked="" type="checkbox"/>
Maintenance	<input checked="" type="checkbox"/>

Commission Percentage

Bill Type	Comm %
Labor	20.00
Material	5.00

Next PO Number
Enter the next PO # value you want to be used by this Technician if they create PO's in the field. The system will automatically increment the numeric portion of this field. We recommend including the technician's initials in the PO# so you know which tech created the PO.
**** IMPORTANT **** These **MUST** be unique for each technician record.

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Technician Setup

Technician

Ascente / Service / Maintenance / Technician

Technician Maintenance

Technician Alex

General | Tech Log | Scheduling

Technician

Name: Alex Smith

Service:

Branch: California

Zone: Orange County

Location: 108 Alex Smith

Labor Grade: T

Supervisor: Mark

Message Protocol: Email

Phone Number:

Cell Carrier: AT&T

Email: test@compusource.com

Mobile

Mobile User: Vendor Class: PLMB Plumb

Next PO Number: AS00001

Email Timecard To: mk.allman@compusource.com

E-mail Timecard To
Enter the email address (or addresses separated by commas) that the Timecard and Hours Worked reports from Mobile should be sent to. This could be set to go both to the technician and to the payroll person in the office.

Service Order Types

Assign All Types:

	Assigned
Air Conditioning	<input checked="" type="checkbox"/>
Heating	<input checked="" type="checkbox"/>
Maint - Billing	<input checked="" type="checkbox"/>
Maintenance	<input checked="" type="checkbox"/>

Commission Percentage

Bill Type	Comm %
Labor	20.00
Material	5.00

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Technician Setup

Technician

Ascente / Service / Maintenance / Technician

Service Order Types Panel

The Dispatch program can warn the dispatcher if a technician, who is not qualified for a specific type of service order, has been dispatched to a call of that type. This is determined by matching the service order type with the types entered for the technician. If you don't want this warning for a specific technician, check the Assign All Types box to disable type verification for the technician.

Technician **Alex**

General | Tech Log | Scheduling

Technician

Name: Alex Smith

Service:

Branch: California

Zone: Orange County

Location: 108 Alex Smith

Labor Grade: T

Supervisor: Mark

Message Protocol: Email

Phone Number:

Cell Carrier: AT&T

Email: test@compusource.com

Mobile

Mobile User: Vendor Class: PLMB Plumbing

Next PO Number: AS00001

Email Timecard To: mk.allman@compusource.com

Service Order Types

Assign All Types:

	Assigned
Air Conditioning	<input checked="" type="checkbox"/>
Heating	<input checked="" type="checkbox"/>
Maint - Billing	<input checked="" type="checkbox"/>
Maintenance	<input checked="" type="checkbox"/>
Plumbing	<input checked="" type="checkbox"/>
Quote	<input checked="" type="checkbox"/>

Commission Percentage

Bill Type	Comm %
Labor	20.00
Material	5.00

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Technician Setup

Technician

Ascente / Service / Maintenance / Technician

Commission Percentages Grid
Bill Type: Enter the billing types that are commissionable for this technician. Bill types not displayed on this grid are assumed to be non-commissionable.
Comm %: Enter the commission percent associated with the various billing types. A 25% commission is entered as 25.00.

Bill Type	Comm %
Labor	20.00
Material	5.00

Technician Setup

Employee

Ascente / Service / Maintenance / Employee

A requirement for Ascente - Timecard processing, is that a Traverse and Ascente employee record must be created. The Ascente - Employee record must be linked to the employee's Ascente - Technician record.

Service Technician
The employee record must reference the employee's technician code.
IMPORTANT: You should never have multiple employee records linked to the same technician record. That would result in errors downloading the mobile labor records.

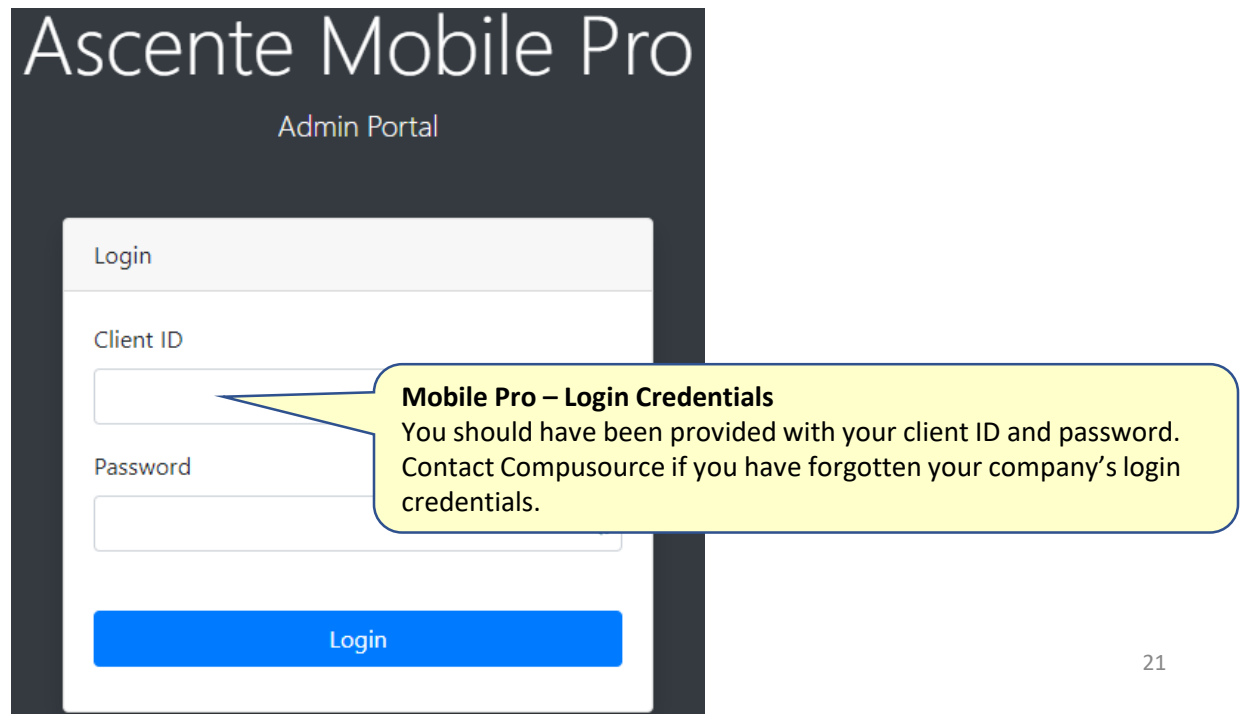
Technician Setup

Ascente Mobile Pro – Admin Portal

<https://mobile.compusource.com/admin/>

This is the web portal where you maintain all technicians that will be using Ascente Mobile Pro. You will add, edit or delete mobile users here.

You should have been provided with your client ID and password. Contact Compusource if you have forgotten your company's login credentials.



Technician Setup

Ascente Mobile Pro – Admin Portal

<https://mobile.compusource.com/admin/>

Tech

Click on the 'Tech' button on the top left of the screen.

The screenshot shows the Ascente Mobile Pro Admin Portal interface. At the top left, the text 'Ascente V11 Test Company' is displayed next to a back arrow. In the top right corner, there is a 'Logout' button. A dark sidebar on the left contains three menu items: 'Dashboard', 'Client', and 'Tech'. The 'Tech' item is highlighted with a yellow background and a red arrow pointing to it. The main content area features a large blue 'Welcome' banner with the text 'Click to manage your techs or view your billing breakdown.' Below the banner, there are two main cards. The left card is blue and states 'You have configured Mobile for 6 techs' with a 'Manage' button and a right-pointing arrow. The right card is green and titled 'Projected billing for the current month', containing a table with the following data:

Description	Amount	License	Total
Server Billing	\$99		\$99
Tech	\$34	1	\$34
Total			\$133

Below the billing table, there is a section titled 'Tech Usage by Month'.

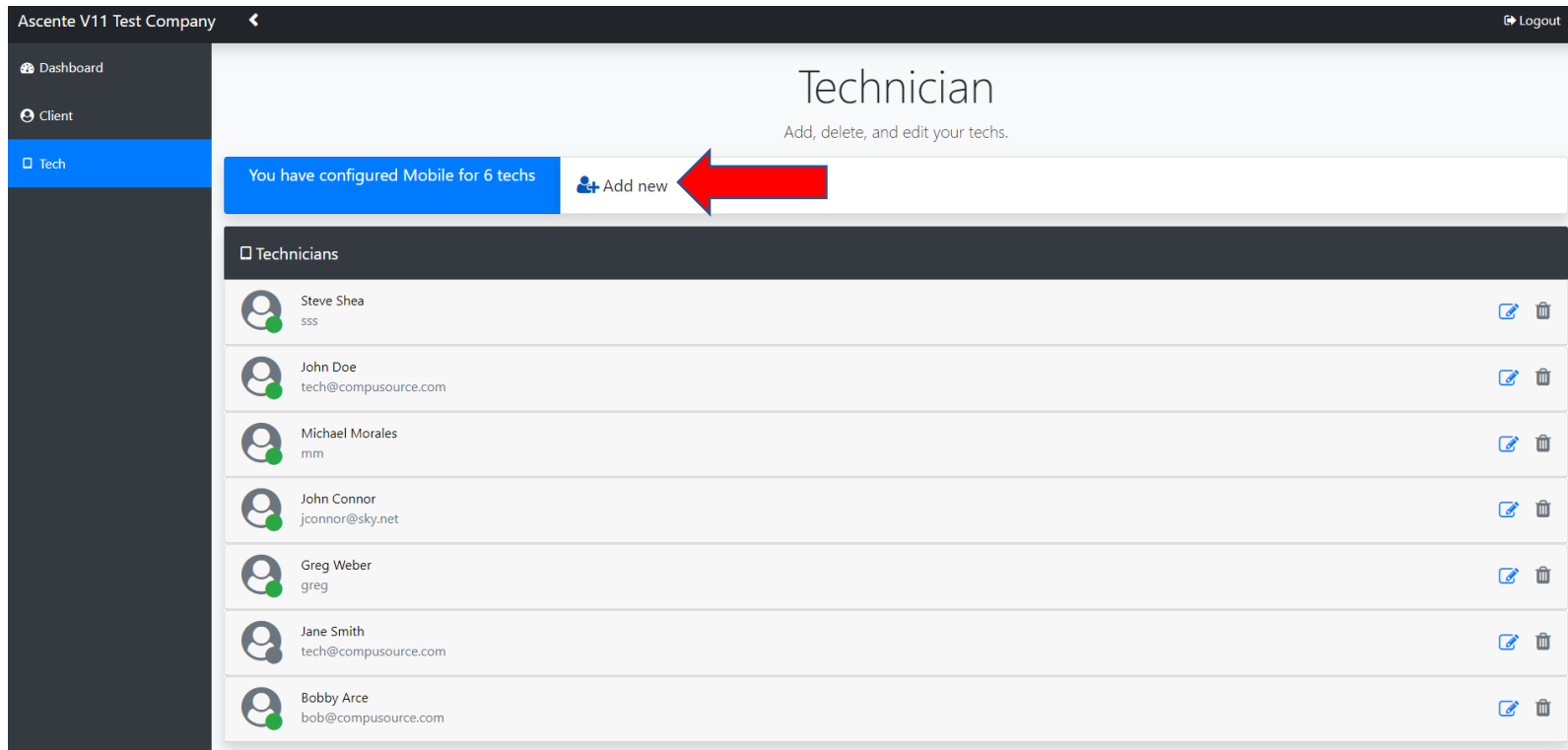
Technician Setup

Ascente Mobile Pro – Admin Portal






















<https://mobile.compusource.com/admin/>

Tech

The existing mobile technicians will be displayed. Click on '+Add New' to add a new mobile technician.



The screenshot displays the 'Technician' management interface in the Ascente Mobile Pro Admin Portal. The page title is 'Technician' with the subtitle 'Add, delete, and edit your techs.' A blue notification bar states 'You have configured Mobile for 6 techs'. A red arrow points to the '+ Add new' button. Below this is a list of technicians with their names, email addresses, and status indicators.

Technicians	
 Steve Shea sss	 
 John Doe tech@compusource.com	 
 Michael Morales mm	 
 John Connor jconnor@sky.net	 
 Greg Weber greg	 
 Jane Smith tech@compusource.com	 
 Bobby Arce bob@compusource.com	 

Technician Setup

Ascente Mobile Pro – Admin Portal

<https://mobile.compusource.com/admin/>

+Add new (Mobile Tech)

You will be presented with this form where you can enter the first and last names, e-mail address and the password the technician will need to use to login to the mobile app. Make sure the mobile technician is set to 'Active'.

Technician
Add, delete, and edit your techs.

You have configured Mobile for 6 techs

Add new

First name

Last name

Email

Password

Active

Password
This along with the e-mail address is required to login to the Ascente Mobile Pro app.

E-mail
This is the e-mail address that the technician must use when logging into the mobile app. This **MUST** be the exact same e-mail address assigned in the technicians Ascente – Technician record. I recommend you cut & paste that e-mail address here.

Technician Setup

Conclusions & Common Issues

- Technician can't login to the Ascente Mobile Pro web app:
 - Is the tech using this URL? <http://mobile.compusource.com/>
 - Does the technician's e-mail in the Ascente – Tech and web portal records match?
 - Is the 'Mobile User' check box checked in the Ascente – Tech record?
- What is the link for the Mobile Pro – Admin Portal?
 - <https://mobile.compusource.com/admin/>
- What do I do when a technician leaves our company?
 - Ascente – Technician: Uncheck the 'Service' and 'Mobile User' boxes.
 - Mobile Pro – Admin Portal: Delete or inactivate the mobile tech record.
- How can the office know what labor was entered on the mobile devices?
 - Have the techs use the mobile – Reports – Timecard Report to e-mail the office a report of the timecard records entered.



Thank You!

We thank you for attending or watching this webinar and for choosing Ascente.

Please let us know if you have any questions or would like a follow-up call to discuss this in more detail.

More training videos like this are available on our website www.compusource.com

<http://www.servicecontractorsoftware.com/>

