

Ascente/pulseM Interface

Tech on the way message:

When the Office (in Ascente) or the Technician (in Mobile Pro) sets a call status to be "In-Route" (or any status code(s) of your choosing), the system will automatically send the call information to pulseM. pulseM will then send the email/text that you have designed on their system:

Call Inquiry and Dispatch

Promise Date Through Through 10/8/2020

Display Call Inquiry Dispatch Board Schedule Board

Dispatch

Service Order CS000116 Technician Gina Date 10/8/2020 Time 8:24:11 AM Status In Route

Comment Work Order Amount 222.94

Promise Date 3/19/2019 Promise Time Exactly 10:29 AM Est Hrs 1.00 Service Order Promise Date Exactly-3/19/2019 Exactly 10:29 AM

Add to Log Send Message OK Undo

Ascente 4.2 Test Company

053048: Chris Dixon

147 W. Stone Path Lane, Eagle

In Route

Home Investigations Entry Notes Maintenance Refrigerant Review

General Jobsite Components Schedule

Wade Peterson from Best Plumbing Group LLC is on the way.

The pulseM Team <donotreply@speetra.com>
To Mark S. Rice
Mon 11/21/2016 7:02 AM

Reply Reply All Forward

If there are problems with how this message is displayed, click here to view it in a web browser.



Dear Anthonys Home Port,

Wade Peterson from Best Plumbing Group LLC is on the way.



Click to see bio

Regards,
Best Plumbing Group LLC.

Ascente/pulseM Interface

Key items of note:

- The system will try to send the text to the Cellular phone number on the call. We can also rename the existing Fax phone number to be Secondary Cell (or any name you want), and we can have the system send to this also
- If there is no primary or secondary cell phone number on the call, the system will try to send to the jobsite email address on the call. If there are no cell numbers, or email address, the message will not get sent to the customer
- Some of you have jobs that last multiple days. In this situation we only send the information to pulseM when the primary tech (one on the general tab of the Service Order) changes their status to "In-Route"
- The Technician Email in Technician Maintenance, must match the Tech ID that you set up in pulseM
- The Technician picture and bio are set up in the pulseM system

Service Order CS000116 Call Taken By: sa Date: 3/14/2019 Time: []

General | Billing | Invoice | Tech Log | Scheduling Recalc Pricing Recalc Taxes

Trouble: Heating Type: Heating
 Problem: Furnace Blowing Cold Air

Jobsite: *Existing Jobsite* Update Jobsite []
 Jobsite: 135 Ontario Rd.
 Name: Jennifer Yang
 Address 1: 135 Ontario Rd.
 Address 2: []
 City: Ontario Region: CA
 Postal Code: 91762 Country: USA (310)
 Email: mice@compusource.com

Type	Phone Number	Extension	Contact
Cellular	(909) 565-1656		Jennifer
Cell 2	(909) 565-5511		Tom

Contacts: Call First (None) Caller: Jennifer

Service Order
 Comments: Ask for Tammy to get key to access roof
 Ad: AdvertisingNetworks Terms: 10 10 Days
 Price Level: Regular Tax Group ID: LA La County
 Branch: California Dept: Service
 Maint: Billable PO: []
 Own/Rent: [] Septic: []
 Invoice: [] Type: Invoice

Scheduling
 Technician: Gina Status: In Route
 Priority: Regular
 Zone: Los Angeles
 Est. Hours: 1.00 Sch. Hours: 1.00
 Prom Date: 3/19/2019
 Prom Time: Exactly 10:29 AM
 Scheduled: In Route - 3/19/2019 Exactly 10:29 AM

Created: 3/16/2015 11:01:07 AM Changed: sa 3/14/2019 10:02:49 AM 10/8/2020 8:36 AM

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Job complete message:

When the Office (in Ascente) or the Technician (in Mobile Pro) sets a call status to be "Closed" (or any status code(s) of your choosing), the system will automatically send the call information to pulseM. pulseM will then send the email/text that you have designed on their system:

The screenshot shows the 'Call Inquiry and Dispatch' window. The 'Status' dropdown menu is open, showing 'Closed' selected. Other fields include Service Order (CS000116), Technician (Gina), Date (10/8/2020), Time (8:46:56 AM), Amount (222.94), and Promise Date (3/19/2019). There are checkboxes for 'Add to Log' and 'Send Message', and an 'OK' button.

The banner features the Ascente logo and text: 'Ascente 4.2 Test Company', '053048: Chris Dixon', and '147 W. Stone Path Lane, Eagle'. A 'Closed' button is highlighted with a mouse cursor. There are also icons for a truck with the number 22, a grid, and a hamburger menu.

Did Jimmy Zeledon from Best Plumbing Group LLC do a good job for you?



Mark S. Rice
To: Mark S. Rice

Reply Reply All Forward ...
Mon 8/10/2020 4:57 PM

From: The pulseM Team <donotreply@speetra.com>
Sent: Saturday, November 19, 2016 3:31 PM
To: Mark S. Rice <mrice@compusource.com>
Subject: Did Jimmy Zeledon from Best Plumbing Group LLC do a good job for you?



Dear Starbucks Coffee Company,

Did Jimmy Zeledon from Best Plumbing Group LLC do a good job for you? Please click on the button below and tell us. It only takes 30 seconds.



Regards,
Best Plumbing Group LLC

Ascente/pulseM Interface

Key items of note:

- The same criteria as the “Tech on the way” message apply (cell phone numbers, jobsite email address and technician email address)
- Some of you have jobs that last multiple days. In this situation we only send the information to pulseM when the all techs have changed their status to “Closed” (or any other status code(s) of your choosing). This way the customer is only sent the message when the last tech wraps up the job.