

Overview

Zones are not required, but recommended to geographically group and manage your service calls. When a new call is entered and the postal code is entered, the zone assigned to that postal code will be assigned to the service order. The Call Inquiry board can filter the service orders to selected zones. When a technician is done working on a service job, you can determine if there are any other service calls in the zone he is in or other zones by them. The base unit of a zone is one postal code area. A zone can be assigned to multiple postal codes, but a postal code can't reference multiple zones.

Benefits

- Technicians spend less time driving between jobs
- Technicians can be more productive
- Savings in fuel and related vehicle expenses
- Consider the benefits to your company's bottom line by the above benefits.

Setup Considerations

- The base unit of a zone is one postal code area. A zone can be assigned to multiple postal codes, but a postal code can't reference multiple zones.
- The zones can be as detailed or general as you want.
- You might want to consider a zone to be an area that you can drive to and from any point in that zone within 15 minutes. Obviously zones in a major populated area downtown will be smaller than zones in a rural area. A zone downtown may be only one postal code and a zone in a rural area may encompass multiple postal codes.

Assigning Zone Codes

- Some accounts will assign zones by county such as for Los Angeles County they may be L01 through L99 and Orange County may be O01 – O99.
- Come accounts will make the zones just be the city name.
- I have also had accounts just assign the zones the numbers 1 through 4.

Setup Process

It is recommended to locate a postal code map of the areas you service in order to determine how you want the zones defined. You will then enter all of the zones using the Ascente – Zone Maintenance program.

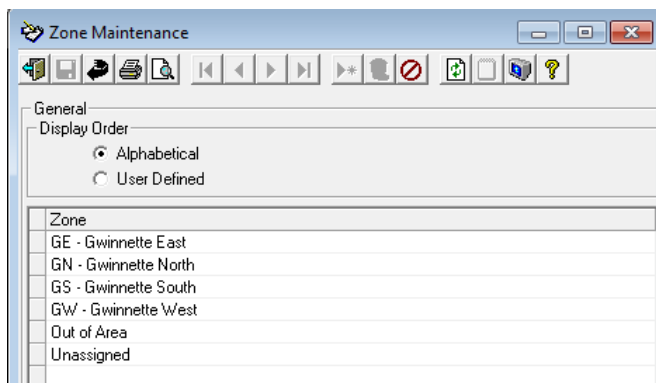


Figure 1: Zone Maintenance

Ascente
Service Dispatch
Zone Setup and Use Considerations

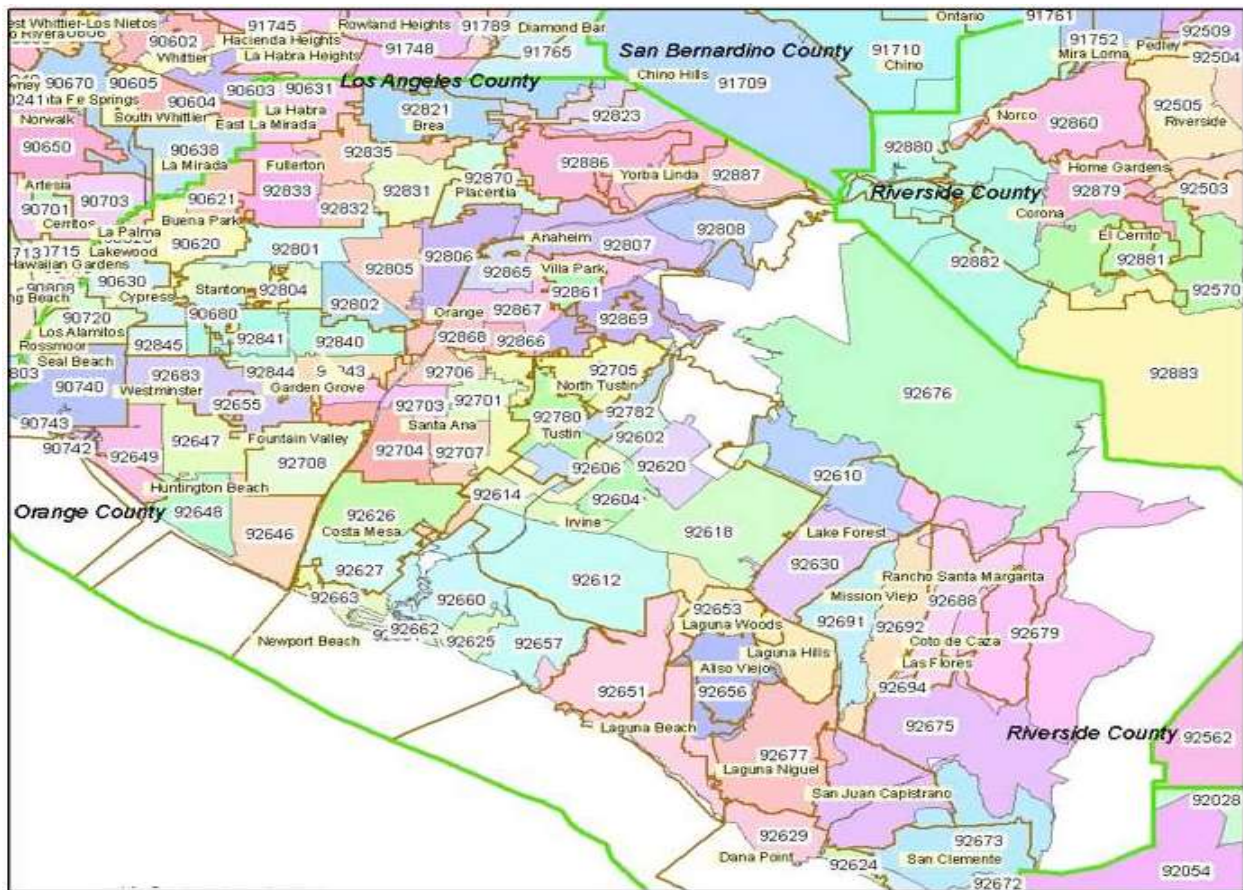


Figure 2: This is a postal code map found on the internet.

You will use the Ascente Postal Code Maintenance program to assign the zones to the postal code records that you have determined.