



Advanced Scheduling

Technisoft's® powerful scheduling software re-defines the expression, "control freak".

Try not to get hung-up on the word, 'Scheduling'. Although this software greatly enhances scheduling, it's more about 'Advanced'. If you're already running this app, you know what we're talking about. If you're running Technisoft's Service Manager® and thinking of adding it, fasten your seat-belt and read on.

Advanced Scheduling is the result of a collaborative effort. Field engineers gave us feed-back, Dispatch Managers described what they needed, and CFOs weighed in. We took it all onboard before we went to work. Nothing was assumed.

Technisoft® developers have a proven track-record of creating what you need, giving you what isn't currently available and taking a leadership role in a highly competitive industry. So what makes Advanced Scheduling different?

3 Pivot views to meet everyone's needs.

Integrates to back-end accounting.

Accountants; we hear you.

Integrates to Field Mobile Devices.

Draw an entry and it appears on iPhone / Android / Blackberry – any phone with browser support. Also appears on iPad and Android tabs.

Sync to Outlook. This isn't entirely unique to Advanced Scheduler, but it's a feature we think all similar software should have.

Customise Advanced Scheduling for client-specific requirements. Take the keys. You drive.

Advanced filtering of appointments using numerous criteria. Managing plant and people isn't always predictive. This feature is for taking control when the unexpected happens, when on-the-fly decisions are based on current, critical information. When there's no margin for error.

And it's with those situations in mind that we've designed interfaces that are easy to learn, easy to use. From the field to Command Control and up to the 25th floor of HQ, Advanced Scheduling empowers everyone to the appropriate degree.

Advanced Scheduling enables service management staff to monitor workloads for employees, equipment and sub-contractor resources via a single integrated **Control Centre** for your business.



We take a nuts-and-bolts approach to running our own business. And underpinning that is our ability to control our own business-destiny. That's the spirit in which we developed this exceptionally powerful app. We don't think we're alone in this thinking.

Welcome to **Advanced Scheduling!**



•Plan •Forecast •Organize•Schedule

Monitor the progress of jobs as engineers or technicians complete work, change the status of the job, book time to the job, write notes or complete tasks and activities.

- Book Appointments, Enter Actual Time
- Manage Conflicts, Reschedule Resources
- Find people with the right Skills
- Update Field Staff with changes
- Check incomplete work
- Sync to Outlook Calendar
- Print Schedules, Work Orders, Maps
- Manage Preventative Maintenance Jobs
- Send Email Alerts
- Reserve or Book Internal Equipment
- Route Plan job schedules
- Manage Work Groups / Service Centres



Instantly change between multiple Pivot views to manage Jobs and Resources.

Calendar View displays the selected day, week, or month in a familiar Outlook style presentation. Add new appointments, reschedule or reassign existing appointments without creating conflicts. Use the Recorder to Record time on site.

The screenshot shows the 'Calendar' view for Friday, 11th December 2020. The interface includes a menu bar (File, Edit, View, Tools, Help), a toolbar with various icons, and a left sidebar with navigation options like 'Calendar', 'Job Query', 'Job List', 'Resource Schedule', and 'Routing'. The main calendar grid shows appointments for various resources: Andrea Applegate, Clarence Vettner, Dean Stockwell, Catapillar Truck CAT797, Boom Lift (SN #BOOM1234), and All Lift Cabling Services. Appointments include 'Coastal Electric', 'At Dentist Ouch!', 'Bargain Mart San Diego', 'At Doctors', 'Lunch with friend.', 'Mr. Ronald Black', 'Mr. Ronald Black, JOBSC2000071, Maintenance Worksheet WSH000000084 for 2020/1, Santa Monica', and 'Bargain Mart San Diego, JOBSC2000085, Service Valmet Wind Turbine Gearbox, Los Angeles'. A detailed appointment popup is visible for 'Bargain Mart San Diego, JOBSC2000085, Service Valmet Wind Turbine Gearbox, Los Angeles', showing appointment details like time, ID, and description.



Job List View allows you to display and sort jobs in a list view using various filters or queries.

Simultaneously display the properties of the Jobs, Phases and Assigned Resources in a Gantt style view.

Find and assign available Resources to Jobs using drag and drop functionality.

Click a column to sort data. Move a column or add a new column from the database as required.

Pin information away when not required to maximise screen viewing area.

Connect and Manage People, Equipment and Sub-contractors!



Full Multi-user Support means that when a change is made by one person, it is reflected on everyone's screens.

Document Number	Priority	Status Name	Service Center Code	Site Name	Date Entered	Description	Address
JOB000001421	3	Active		Coastal Electric Company	11/12/2020	Maintenance Worksheet WSH000000085 for 2020/1	12 Sierks Street, Costa Mesa, CA, 92627, USA
JOB000001422	3	Active		Coastal Electric Company	11/12/2020	Maintenance Worksheet WSH000000085 for 2020/1	12 Sierks Street, Costa Mesa, CA, 92627, USA
JOB000001423	3	Active		Coastal Electric Company	11/12/2020	Maintenance Worksheet WSH000000085 for 2020/1	12 Sierks Street, Costa Mesa, CA, 92627, USA
JOB000001424	3	Active		Coastal Electric Company	11/12/2020	Maintenance Worksheet WSH000000085 for 2020/1	12 Sierks Street, Costa Mesa, CA, 92627, USA
JOB000001425	3	Active		Coastal Electric Company	11/12/2020	Maintenance Worksheet WSH000000085 for 2020/1	12 Sierks Street, Costa Mesa, CA, 92627, USA
JOBSC1000672	1	Pending	1	Bargain Mart San Diego	11/12/2020	Dry Wall Installation	2820 Wabash Road, Los Angeles, CA, 90033-2605, USA
JOBSC1000673	5	Pending	1	Bargain Mart San Diego	11/12/2020	Service Longhaul Road Truck	2820 Wabash Road, Los Angeles, CA, 90033-2605, USA
JOBSC1000674	1	Parts On Order	1	Bargain Mart San Diego	11/12/2020	Service Cat	2820 Wabash Road, Los Angeles, CA, 90033-2605, USA
JOBSC1000675	1	Parts On Order	1	Bargain Mart San Diego	11/12/2020	Service Cat	2820 Wabash Road, Los Angeles, CA, 90033-2605, USA
JOBSC1000676	1	Pending	1	Bargain Mart San Diego	11/12/2020	Service Cat	2820 Wabash Road, Los Angeles, CA, 90033-2605, USA
JOBSC1000677	5	Parts On Order	1	Bargain Mart San Diego	11/12/2020	Service	2820 Wabash Road, Los Angeles, CA, 90033-2605, USA
JOBSC1000678	5	Pending	1	Bargain Mart San Diego	11/12/2020	Computer - Repairs	2820 Wabash Road, Los Angeles, CA, 90033-2605, USA
JOBSC1000679	5	Pending	1	Bargain Mart San Diego	11/12/2020	Computer - Repairs	2820 Wabash Road, Los Angeles, CA, 90033-2605, USA
JOBSC1000680	5	Pending	1	Bargain Mart - Pomona	11/12/2020	Copier Printer Repair	2 S Linden Street, Pomona, CA, 91766, USA
JOBSC1000681	5	Pending	1	Bargain Mart San Diego	11/12/2020	Computer - Repairs	2820 Wabash Road, Los Angeles, CA, 90033-2605, USA
JOBSC1000682	1	Active	1	Bargain Mart San Diego	11/12/2020	Security System	2820 Wabash Road, Los Angeles, CA, 90033-2605, USA
JOBSC1000683	1	Pending	1	Bargain Mart San Diego	11/12/2020	Warranty Repair	2820 Wabash Road, Los Angeles, CA, 90033-2605, USA
JOBSC1000684	1	Pending	1	Bargain Mart San Diego	11/12/2020	Installation/Repair Baldor Diesel Genset DLC100Kw	2820 Wabash Road, Los Angeles, CA, 90033-2605, USA
JOBSC1000685	1	Pending	1	Bargain Mart San Diego	11/12/2020	Test Demonstration	2820 Wabash Road, Los Angeles, CA, 90033-2605, USA
JOBSC1000686	5	Pending	1	Bargain Mart San Diego	11/12/2020	General Service Turbine	2820 Wabash Road, Los Angeles, CA, 90033-2605, USA
JOBSC1000687	1	Pending	1	Bargain Mart San Diego	11/12/2020	Installation/Repair Baldor Diesel Genset DLC100Kw	2820 Wabash Road, Los Angeles, CA, 90033-2605, USA
JOBSC1000688	5	Pending	1	Bargain Mart San Diego	11/12/2020	Pool Cleaner Repair	2820 Wabash Road, Los Angeles, CA, 90033-2605, USA
JOBSC1000689	5	Pending	1	Bargain Mart San Diego	11/12/2020	Pool Cleaner Repair	2820 Wabash Road, Los Angeles, CA, 90033-2605, USA
JOBSC1000690	1	Pending	1	Bargain Mart San Diego	11/12/2020	Pump Repair	2820 Wabash Road, Los Angeles, CA, 90033-2605, USA
JOBSC1000691	1	Escalation Status	1	Bargain Mart San Diego	11/12/2020	Compressor Repair and Service	2820 Wabash Road, Los Angeles, CA, 90033-2605, USA
JOBSC1000692	1	Pending	1	Bargain Mart San Diego	11/12/2020	Turbine Replacement	2820 Wabash Road, Los Angeles, CA, 90033-2605, USA
JOB000001426	1	Pending	1	Bargain Mart San Diego	11/12/2020	Cabling Installation	2820 Wabash Road, Los Angeles, CA, 90033-2605, USA
JOB000001427	1	Pending	1	Bargain Mart San Diego	11/12/2020	Dishwasher Repair	2820 Wabash Road, Los Angeles, CA, 90033-2605, USA



Resource Schedule View displays Resources in a Timeline view allowing, easy booking and rescheduling of those resources.

Create new appointments or edit and/or re-assign existing entries by dragging them around the screen.

View actual time versus estimate time to gauge response turnaround time.

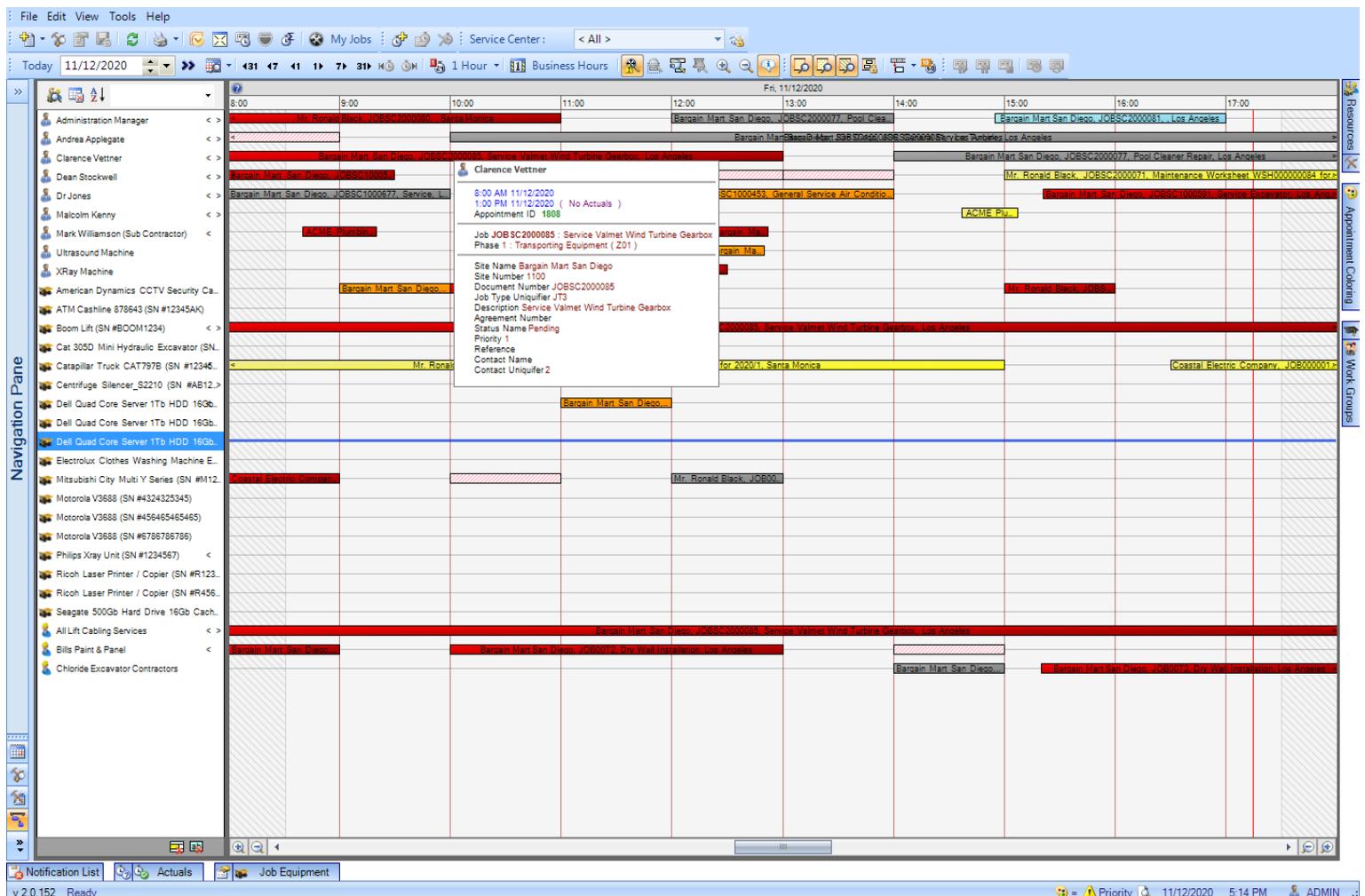
Write unlimited notes describing work performed or other related information.

Allocate time to a specific labour or travel service and bill your customer.

There is a Pivot view for everyone's needs!

Common characteristics across Views

- Create, edit, or reschedule appointments
- Find and book available resources by time, skills or area
- Check Equipment details and history
- Check Agreement properties
- Colour Appointments using different filters
- View or Print Maps and Directions
- Sync to Outlook
- View information by Service Centre
- My Jobs only view (security setting)
- Drill in to view full Job details
- Zoom to different time scales
- Hover over an Appointment to view summary details about the Job
- Hover over a resource to view details about that resource.



Job Query provides almost limitless ways to find information about jobs.

Search for jobs with pending PO's.

Search for jobs with no assignments so that employees can be scheduled.

Find overdue jobs or jobs that are late starting.

Display jobs of a particular type only. e.g. Maintenance Jobs as opposed to Do and Charge Add hoc Jobs.

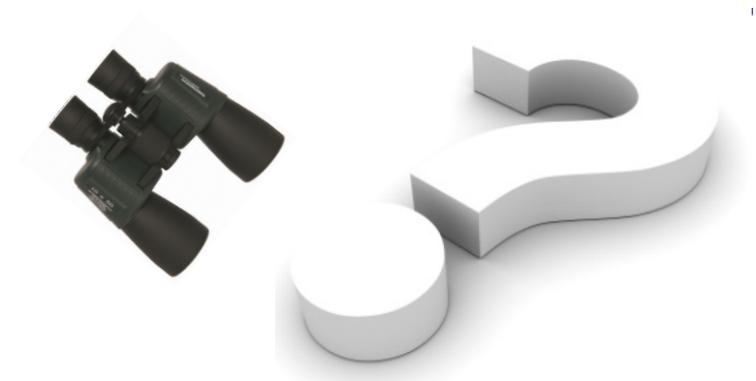
Display jobs over budget.

Find jobs for a particular person, with a particular status and priority.

Find a single job or filter by Date Range, Status, or Priority.

Once a query has returned results it is auto loaded into the Job List view to enable quick management of the resultant jobs.

Create hundreds of individual queries and save them so they can be quickly used and reused many times.



SI60A - Service Manager Advanced Scheduling (Technisoft) - v.2.0.152 for 60A

File Edit View Tools Help

My Jobs Service Center: < All >

Today 11/12/2020

Job Query Filter Query Single

PO Query
PO Query Parts On Order

Repair Centre
Repair Centre Status

Jobs
Unassigned Jobs

Maintenance
Maintenance Jobs

Jobs Over Budget
Over Budget

Criteria
Documents with Status - [Parts On Order]
Documents with Priority - [Priority 1]

Open Document Query

Calendar
Job Query
Job List
Resource Schedule
Routing

Job Search List Max Job List Transfer Records: < Unlimited > 30 Rows

Select	Document Number	Priority	Status Name	Service Center Code	Date Entered	Description	Job Typ
<input checked="" type="checkbox"/>	JOB000001148	1	Parts On Order		19/11/2008	General Service Turbine	JT3
<input checked="" type="checkbox"/>	JOB000001151	1	Parts On Order		25/11/2010	Electrical Panel Build & Design	JT3
<input checked="" type="checkbox"/>	JOB000001169	1	Parts On Order		19/12/2008	Electrical Panel Build & Design	JT3
<input checked="" type="checkbox"/>	JOB000001204	1	Parts On Order		9/02/2009	Maintenance Repair Rheem Hot Water Tank R400	JT3
<input checked="" type="checkbox"/>	JOB000001309	1	Parts On Order		6/04/2009	General Service Air Conditioner	JT3
<input checked="" type="checkbox"/>	JOBSC1000045	1	Parts On Order	1	29/04/2009	TITAN-LH1_Trackmobile Service	JT3
<input checked="" type="checkbox"/>	JOBSC1000356	1	Parts On Order	1	22/01/2010	Service AFIRS 220	JT3
<input checked="" type="checkbox"/>	JOBSC1000403	1	Parts On Order	1	9/03/2010	Service Drink Cooler	JT3
<input checked="" type="checkbox"/>	JOBSC1000425	1	Parts On Order	1	11/03/2020	Service Phillips Xray Machine	JT3
<input checked="" type="checkbox"/>	JOBSC1000444	1	Parts On Order	1	2/12/2020	Security System	JT3
<input checked="" type="checkbox"/>	JOBSC1000456	1	Parts On Order	1	2/12/2020	General Service Air Conditioner	JT3
<input checked="" type="checkbox"/>	JOBSC2000054	1	Parts On Order	2	2/12/2020	General Service Air Conditioner	JT3
<input checked="" type="checkbox"/>	JOBSC1000469	1	Parts On Order	1	11/12/2020	Hydraulic Pump Service 11	JT3
<input checked="" type="checkbox"/>	JOBSC1000472	1	Parts On Order	1	11/12/2020		JT3
<input checked="" type="checkbox"/>	JOBSC1000492	1	Parts On Order	1	11/12/2020	Hydraulic Pump Service	JT3
<input checked="" type="checkbox"/>	JOBSC1000493	1	Parts On Order	1	11/12/2020	Polish/Cut/Laminate/Shape	JT3
<input checked="" type="checkbox"/>	JOBSC1000498	1	Parts On Order	1	11/12/2020	Installation/Repair Telephone IP System	JT3
<input checked="" type="checkbox"/>	JOBSC1000509	1	Parts On Order	1	11/12/2020	Security Job	JT3
<input checked="" type="checkbox"/>	JOBSC1000521	1	Parts On Order	1	11/12/2020	Installation/Repair Fire Panel System	JT3
<input checked="" type="checkbox"/>	JOBSC1000525	1	Parts On Order	1	11/12/2020	Installation/Repair Hovel_567_Boiler	JT3
<input checked="" type="checkbox"/>	JOBSC1000579	1	Parts On Order	1	11/12/2020	Service and repair	JT3
<input checked="" type="checkbox"/>	JOBSC1000591	1	Parts On Order	1	11/12/2020	Service Excavator	JT3
<input checked="" type="checkbox"/>	JOBSC1000597	1	Parts On Order	1	11/12/2020	Service Cat	JT3
<input checked="" type="checkbox"/>	JOBSC1000628	1	Parts On Order	1	11/12/2020	Metal Compacter Service 11	JT3
<input checked="" type="checkbox"/>	JOB0072	1	Parts On Order	1	11/12/2020	Dry Wall Installation	JT3
<input checked="" type="checkbox"/>	JOBSC1000674	1	Parts On Order	1	11/12/2020	Service Cat	JT3
<input checked="" type="checkbox"/>	JOBSC1000675	1	Parts On Order	1	11/12/2020	Service Cat	JT3
<input checked="" type="checkbox"/>	JOB000001429	1	Parts On Order		11/12/2020	Cell Tower Installation	JT3
<input checked="" type="checkbox"/>	JOBSC2000089	1	Parts On Order	2	11/12/2020	Service/Fabrication	JT3



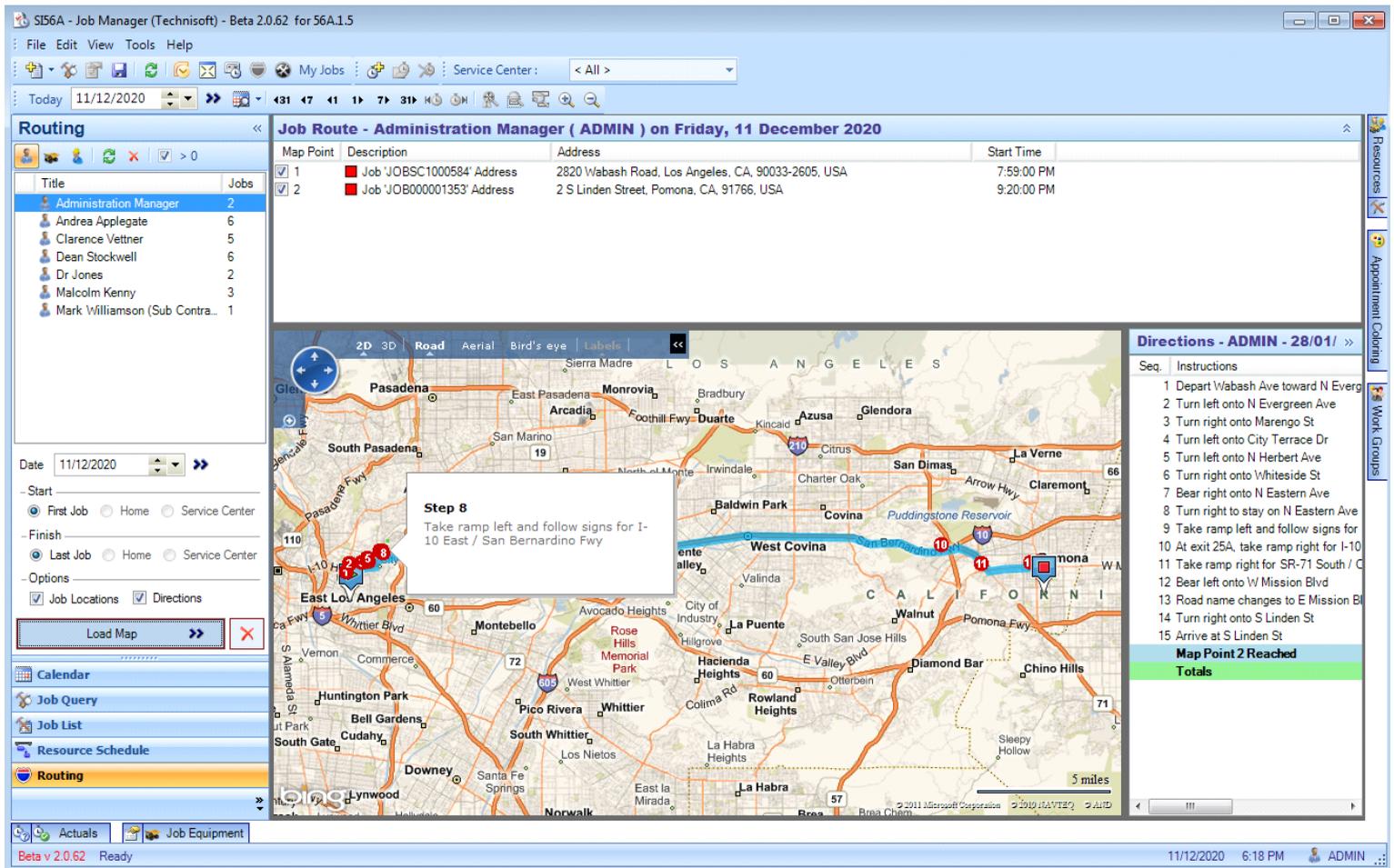
Route Planning uses Bing Maps to help you efficiently schedule Jobs and provide directions to employees.

Display maps in 2D, 3D, Road, Aerial or Birds Eye views. Zoom in or out for more detail.

Reschedule appointments by drilling into the Calendar View and adjusting entries.

Print Work Orders, Maps and Directions.

Reduced travel time between jobs means reduced costs and happier customers.

Job Route - Administration Manager (ADMIN) on Friday, 11 December 2020

Map Point	Description	Address	Start Time
1	Job 'JOBSC1000584' Address	2820 Wabash Road, Los Angeles, CA, 90033-2605, USA	7:59:00 PM
2	Job 'JOB000001353' Address	2 S Linden Street, Pomona, CA, 91766, USA	9:20:00 PM

Directions - ADMIN - 28/01

Seq.	Instructions
1	Depart Wabash Ave toward N Everg
2	Turn left onto N Evergreen Ave
3	Turn right onto Marengo St
4	Turn left onto City Terrace Dr
5	Turn left onto N Herbert Ave
6	Turn right onto Whiteside St
7	Bear right onto N Eastern Ave
8	Turn right to stay on N Eastern Ave
9	Take ramp left and follow signs for
10	At exit 25A, take ramp right for I-10
11	Take ramp right for SR-71 South / C
12	Bear left onto W Mission Blvd
13	Road name changes to E Mission Bl
14	Turn right onto S Linden St
15	Arrive at S Linden St

Map Point 2 Reached

Totals



Development Partner



For more information about this product, please contact us at technisoft@technisoft.com.au or visit our website www.technisoft.com