



## 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 of the Service Manager software. The main window displays a calendar for Friday, 11th December 2020. The calendar is organized into columns for different resources: Andrea Applegate, Clarence Vettner, Dean Stockwell, Catapillar Truck CAT797, Boom Lift (SN #BOOM1234), and All Lift Cabling Services. Various appointment cards are visible, such as 'Coastal Electric' at 12:00, 'At Dentist Ouch!' at 7:00, and 'Bargain Mart San Diego' at 8:00. A detailed view of an appointment is shown on the right, including the time (8:00 AM to 6:00 PM), appointment ID (1806), and job details like 'Service Valmet Wind Turbine Gearbox, Los Angeles'.



**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.

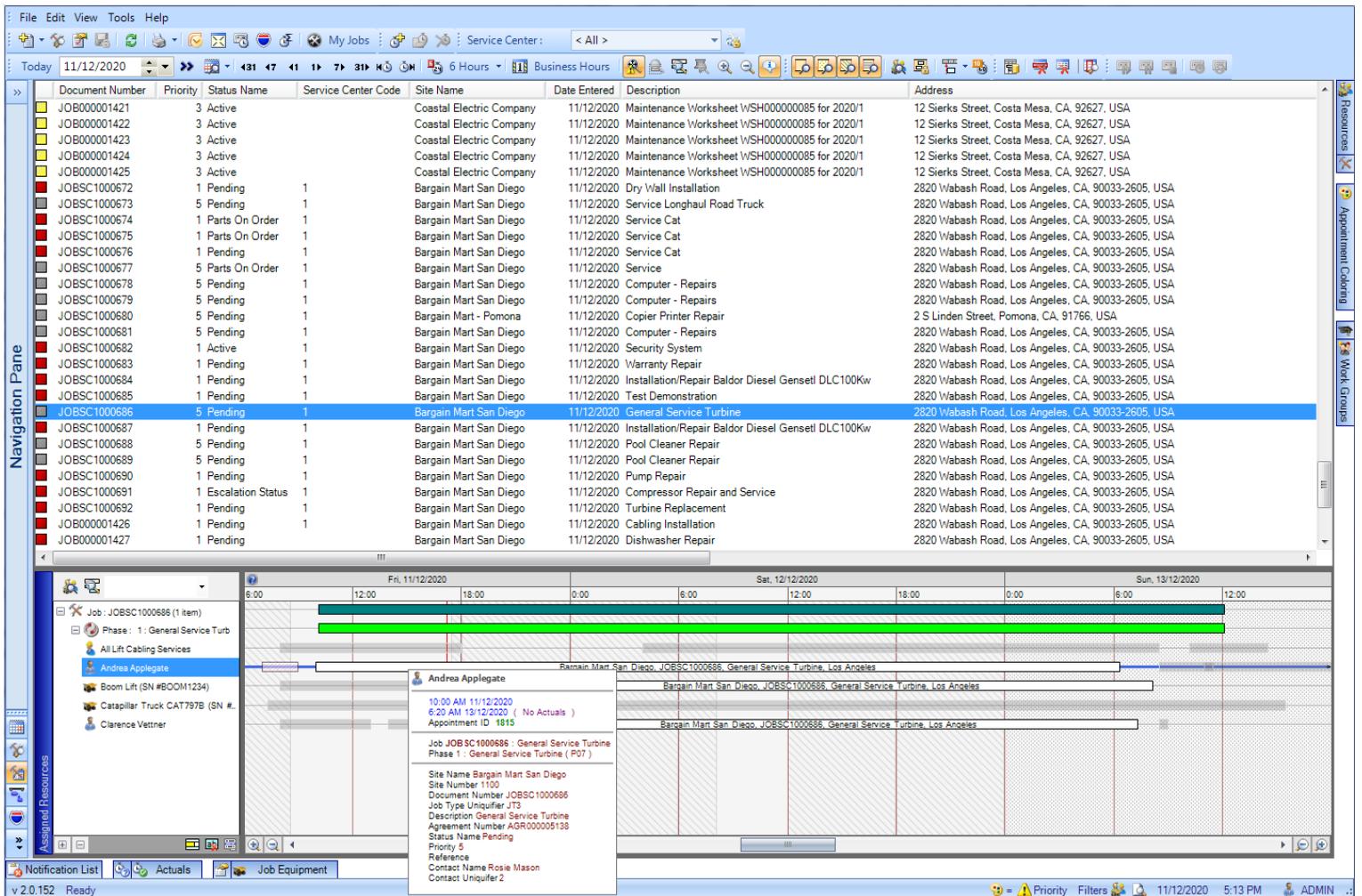
Click a column to sort data. Move a column or add a new column from the database as required.

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.



The screenshot displays the Service Manager interface. At the top, there is a menu bar (File, Edit, View, Tools, Help) and a toolbar with various icons. Below the toolbar is a navigation pane on the left and a main data table. The table has columns for Document Number, Priority, Status Name, Service Center Code, Site Name, Date Entered, Description, and Address. The table contains multiple rows of job entries, with one row highlighted in blue. Below the table is a Gantt chart showing the timeline of the selected job, with bars representing different phases and resources. A detailed view of the selected job is shown in a pop-up window at the bottom, including job details, site information, and resource assignments.

| 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.

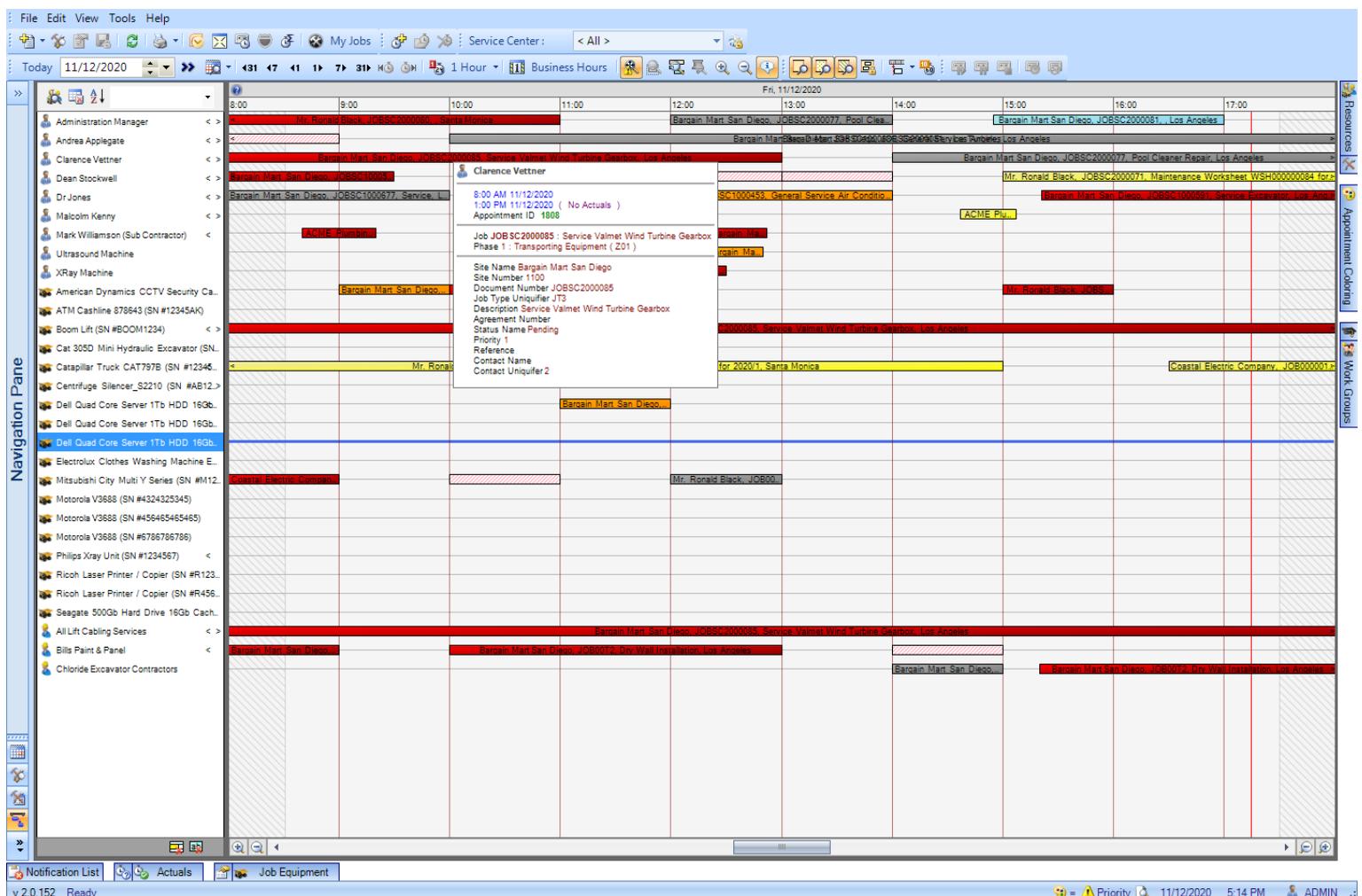
Write unlimited notes describing work performed or other related information.

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.



The screenshot shows the Service Manager interface with a Resource Schedule View. The main area is a grid with time slots (8:00 to 17:00) and resources listed on the left. A pop-up window for 'Clarence Vettner' is open, showing appointment details for 'Service Valmet Wind Turbine Gearbox Phase 1 - Transporting Equipment (201)'. The interface includes a navigation pane, a toolbar, and a status bar at the bottom.



**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.

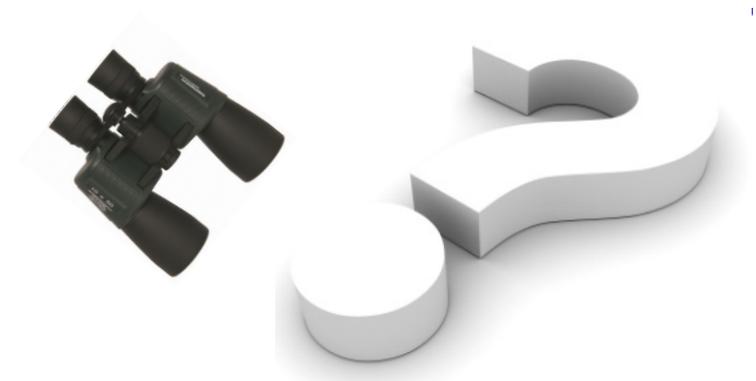
Display jobs over budget.

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     |



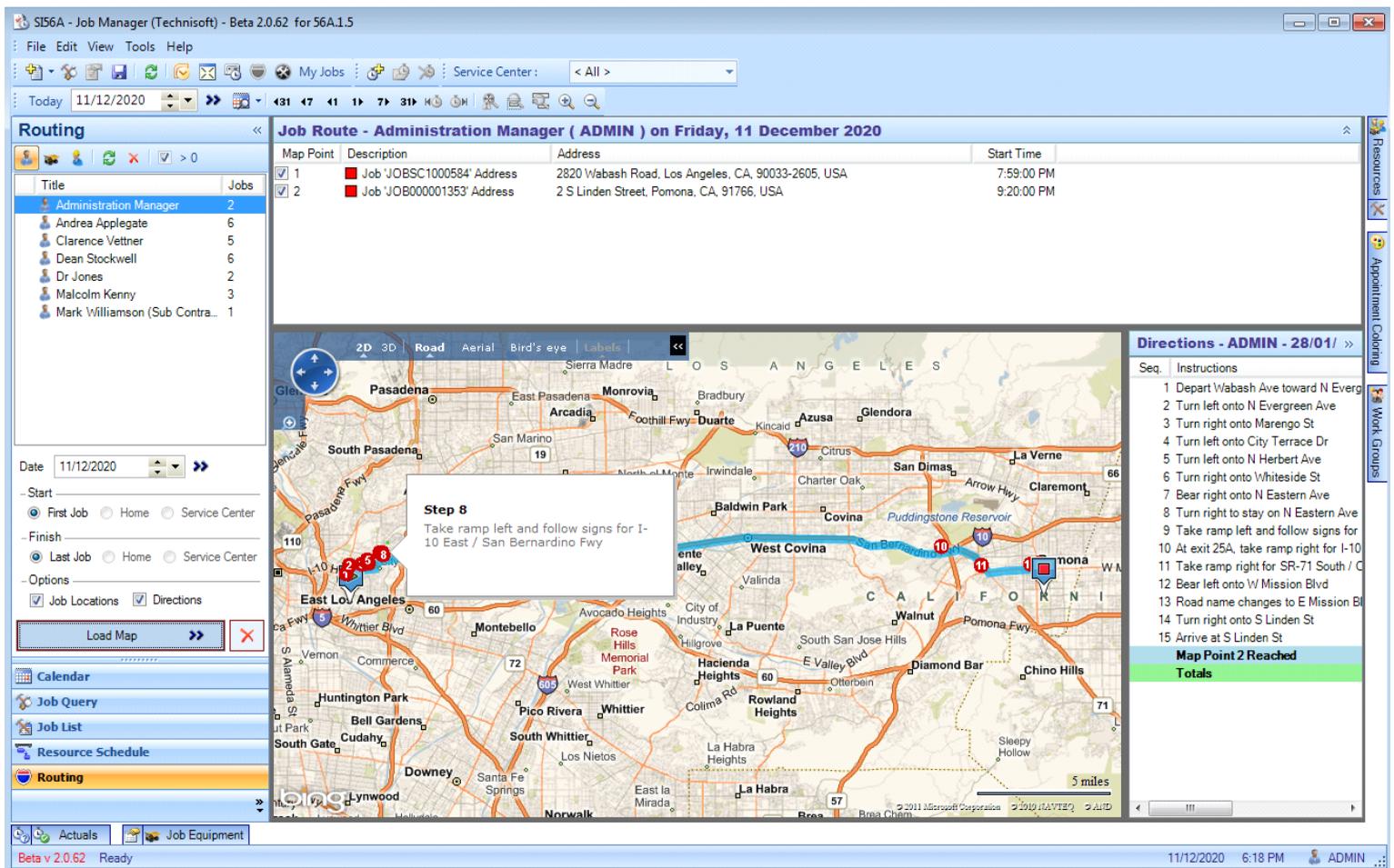
**Route Planning** uses Bing Maps to help you efficiently schedule Jobs and provide directions to employees.

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.

The screenshot shows the 'Routing' module in the Technisoft Service Manager software. The main window displays a map of the Los Angeles area with a route planned between two job locations. A table at the top lists the job points:

| 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 |

Below the map, a 'Directions' panel shows a list of 15 steps for the route. Step 8 is highlighted, indicating the current location on the map. The interface includes a sidebar with navigation options like 'Calendar', 'Job Query', and 'Job List', and a top menu bar with 'File', 'Edit', 'View', 'Tools', and 'Help'.



Development Partner



For more information about this product, please contact us at [technisoft@technisoft.com.au](mailto:technisoft@technisoft.com.au) or visit our website [www.technisoft.com](http://www.technisoft.com)