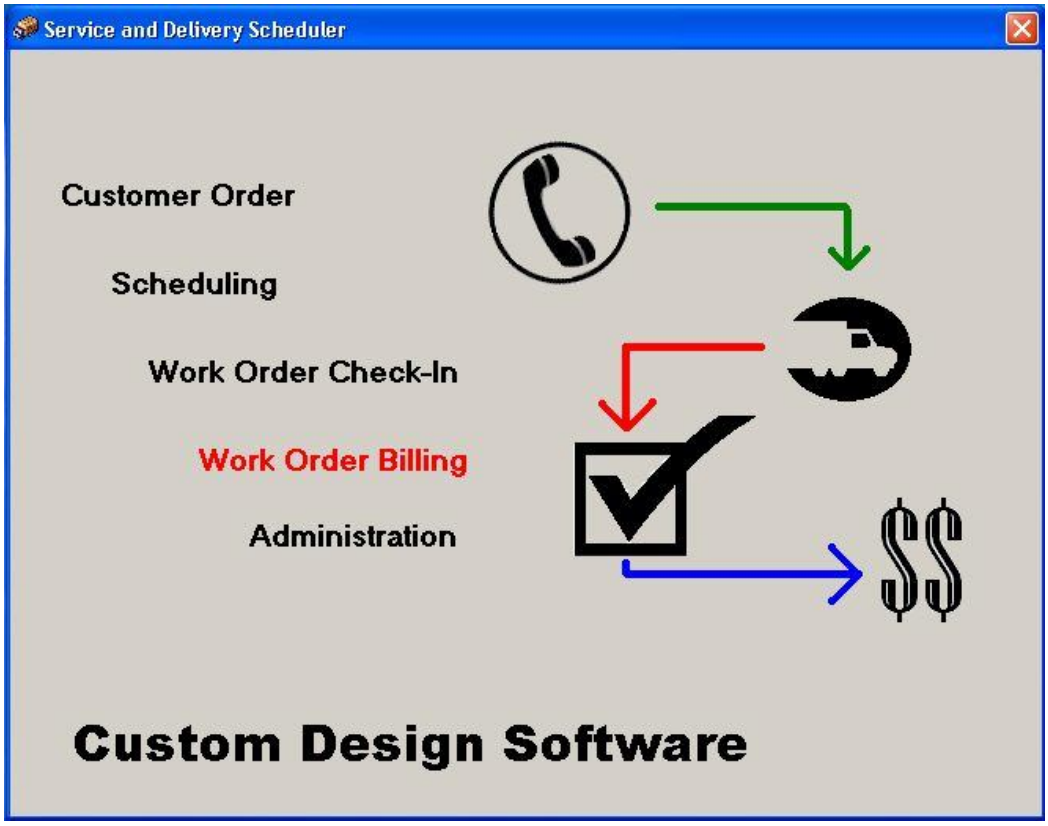
Custom Design SOFTWARE

# Service & Delivery Scheduler




**Custom Design Software, Inc.**
**1731 Treyborne Circle**
**Commerce, MI 48390**
**Sales 800.884.0606**
**Fax 248.669.9514**

**One Truck or Multiple Trucks**

**Single Store or Multiple Stores**

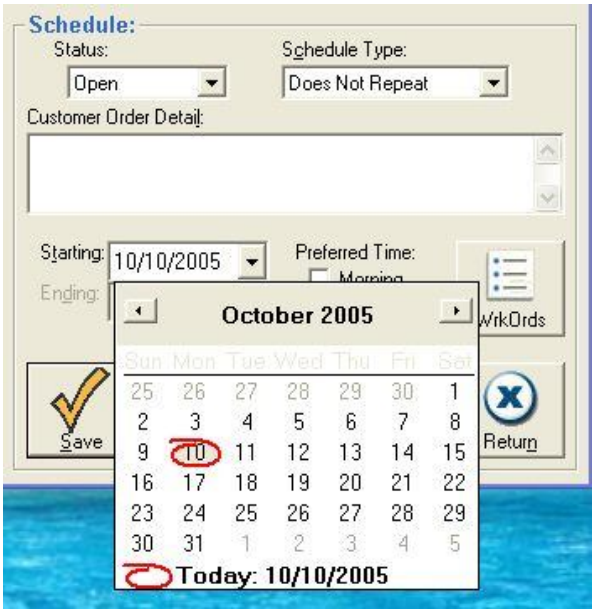
- Pool & Spa Service Companies
- Billiards Stores
- Plumbing Contractors
- Electrical Contractors
- Heating/Air Conditioning
- Carpet Installers

**Since 1991**

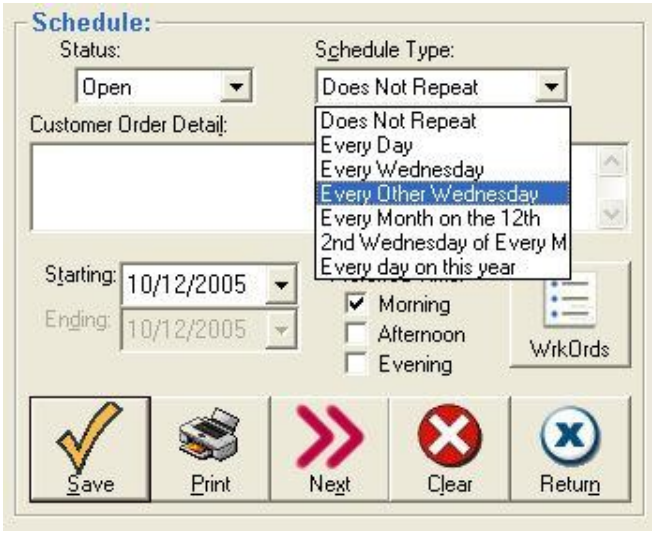
Customer calls or comes in to request service. You can manually enter their name address, etc, however, if they had service before, you can simply click the Look Up and find then by telephone number or name. From your built in Service List, which you can build yourself in the Administration section, you can select the service the customer requested. Or, if it is something not listed, you can add it “On the fly” in the memo box below the Service List. You can price it out accordingly.

If the customer has a special request, it can be entered in the memo box on the right side of the form in the Schedule section.

Next, we need to set up the service appointment on the lower right side of the form. If this is just a one time service, you just set the date on the built in calendar.

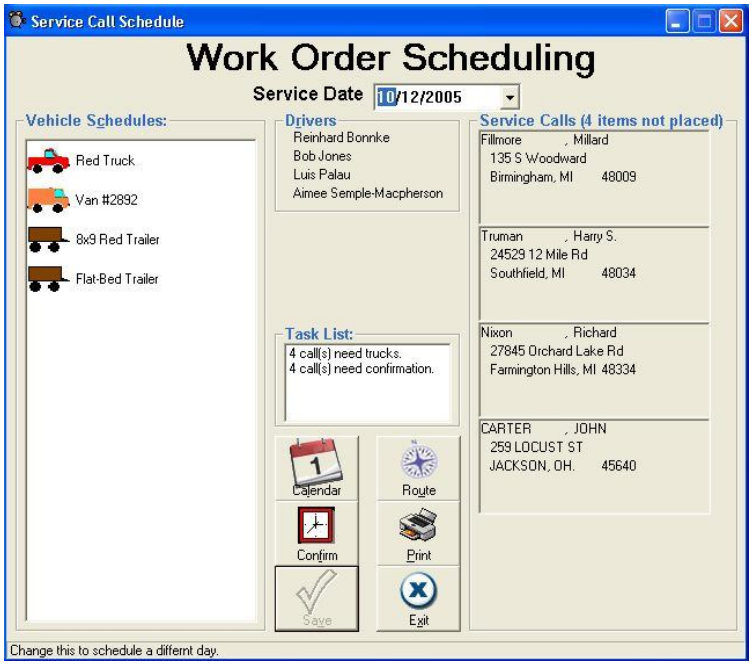


If they need repetitive service, like cleaning a pool bi-weekly, you can set the Beginning Service Date and the Ending Service Date along with the requested time slot; morning, afternoon or evening.



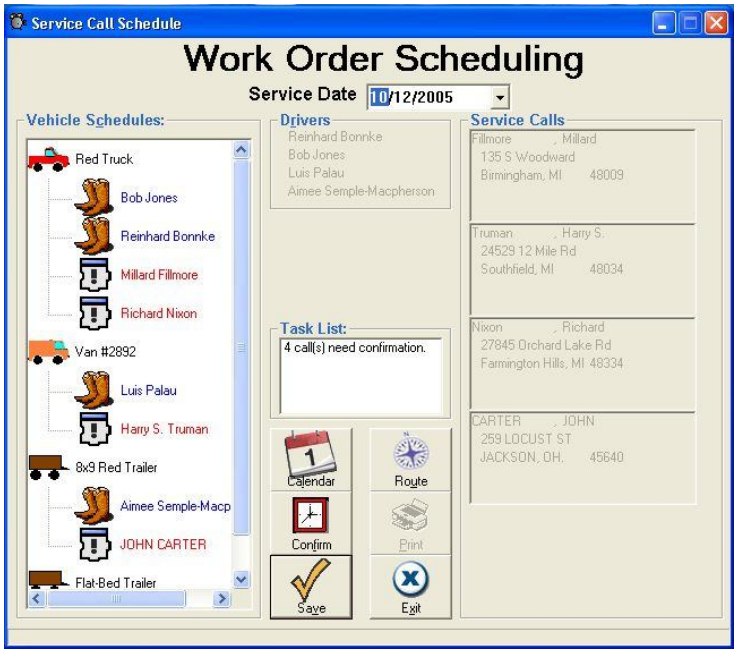

Once the service call is entered, it is automatically set in the data base until completed or canceled. The service call is ready for scheduling at the times requested.

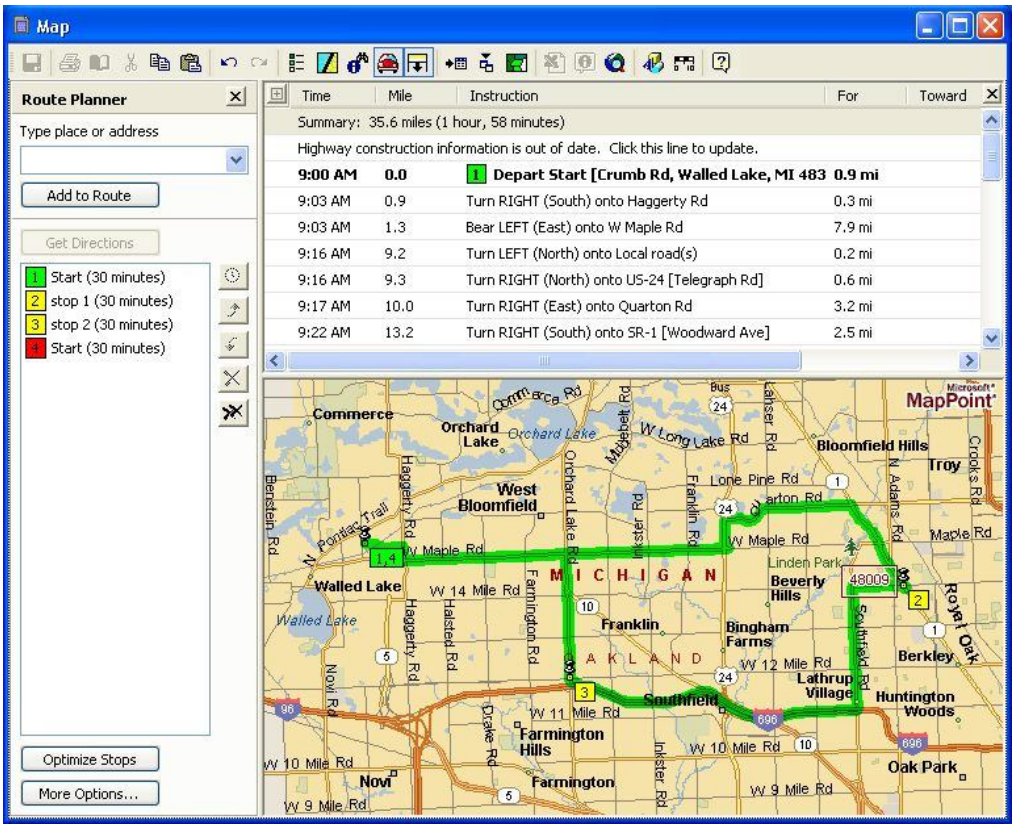
Each morning, when your service manager comes in, he opens the **Work Order Scheduling** form off the main menu. As below, we have three columns, a list of all trucks, list of all drivers and a list of all service calls which were automatically generated by the computer from the Customer Order Intake form. The service manager **Drags & Drops** the drivers onto the trucks. Some service calls might require 1 or 2 drivers depending on the day's calls. Then he **Drags & Drops** the service calls to the appropriate truck. He may double click on any service call to open it up to the service intake form if he needs more information.



# The completed Work Order Schedule

Here we show the completed **Work Order Schedule** with the drivers and the service calls scheduled for the day. After, you confirm the stops; you can print out the actual service calls for each stop and each truck separately. If you purchase Microsoft's Map Point Software, you can click the Route button and the software will automatically calculate the best possible route, with time stops, and print a detailed route and map for the drivers to follow. We can even install a GPS tracking module in each of the trucks so you know where they are at any moment!



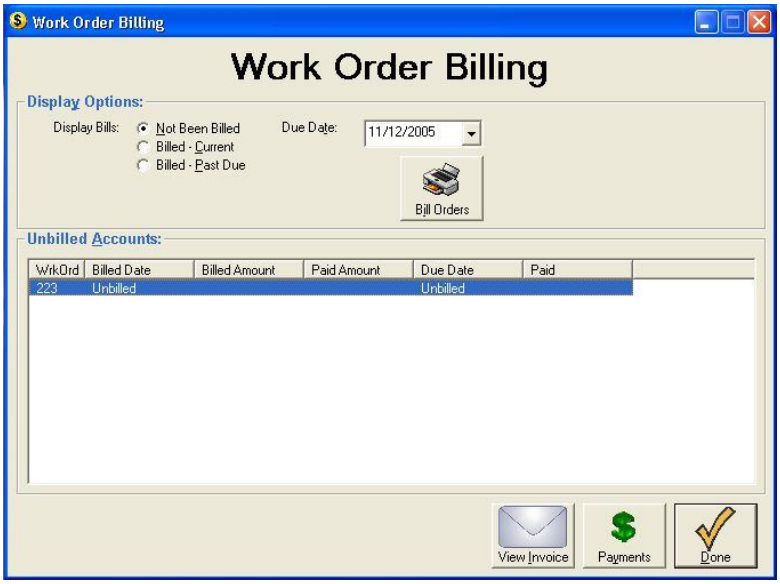



# Work Order Check In

After the driver finishes his calls for the day, he goes to the computer and checks in all work orders. This is where he can add to the work order if the customer request additional services or needs to order parts. Here the customer added a new pool filter. Unlimited notes can be added to the service call. He can even add unlimited digital pictures if he has the need. When the service call is complete, he checks it Complete under Status and the call is set for Billing to the customer.

# Work Order Billing

You can bill your customers at the beginning of the month or at any time during the month to even out your cash flow by having money coming in regularly, not just after the first. Basically, you come into this screen and a list of all the non billed work orders will appear. All you do is click Bill Orders and a completed Invoice is ready to be sent to the customer



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# CUSTOMER ORDER FORM

(Multi-Stores: Use One Form Per Store)

*Please carefully fill out as this is how your store will be set up!*

Store Name _____

Address _____

City/State _____Zip_____

Phone _____Fax_____

Owners Name _____

E-mail _____

## Introductory Special:

**Regular: $1995.00**

**$1500.00**

Valid for 30 days upon receipt
Michigan add 6% Sales Tax

Microsoft's MapPoint available separately.

### Credit Card Information

Name on card _____ Signature _____

Type of card Visa Master Card Discoverer American Express

Card Number _____

Expiration _____

Vin number on rear of card _____