



# **ServiceTitan®**

## **Training**

## **Dispatcher 101**

---

### **Objectives**

**By the end of this session, you should confidently be able to:**

- Identify the status of jobs & technicians (scheduled/dispatched/working/completed)
- Create and edit purchase orders, timesheets, and dispatch board configurations
- Complete jobs from the office

---

### **Goals**

**My goals for this session are:**

---

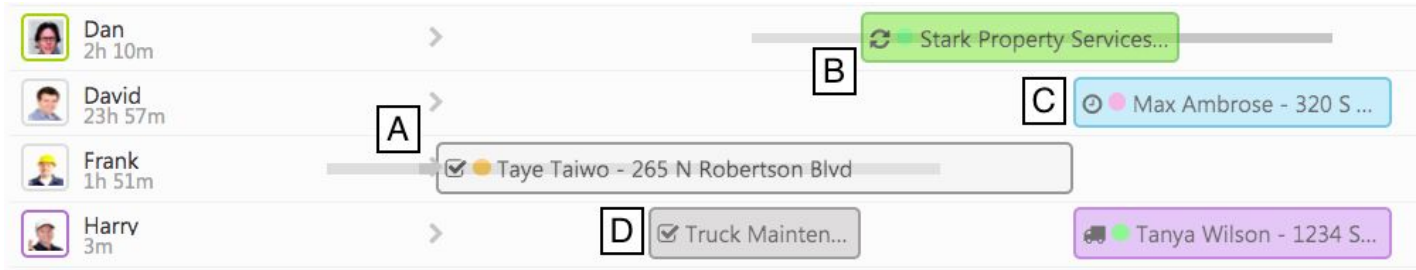
---

## Table of Contents

<b>Dispatch Board</b>	<b>3</b>
Dispatch Board Configurations	7
<b>Job Page</b>	<b>8</b>
<b>Job History</b>	<b>11</b>
<b>Timesheets</b>	<b>12</b>
<b>Purchase Orders</b>	<b>12</b>
<b>Schedule</b>	<b>13</b>
<b>Office or Mobile?</b>	<b>15</b>

## Dispatch Board

Dispatch Board Event	A, B, C, or D?	★ Bonus Question: What color will each event be?
Completed job	_____	_____
In progress job	_____	_____
Non job appointment	_____	_____
Scheduled job	_____	_____

The screenshot shows a dispatch board with four technicians and their job timelines:

- Dan (2h 10m):** Timeline shows a green event labeled 'B' with the text 'Stark Property Services...'.
- David (23h 57m):** Timeline shows a blue event labeled 'C' with the text 'Max Ambrose - 320 S ...'.
- Frank (1h 51m):** Timeline shows a grey event labeled 'A' with the text 'Taye Taiwo - 265 N Robertson Blvd'.
- Harry (3m):** Timeline shows a grey event labeled 'D' with the text 'Truck Mainten...' and a purple event with the text 'Tanya Wilson - 1234 S...'.

Notes:

# Dispatcher Training Handout

Describe what happens to the dispatch board when you click the following:




---




---

Today

---

Draw a line to match each button with the correct action.




---

Refresh the dispatch board




---

Go to dispatch board configurations




---

View dispatch board notifications




---

Filter dispatch board by business unit

All Business Units

---

Send mass SMS to multiple technicians

Notes:

# Dispatcher Training Handout

---



What is the **dot** next to the technician name?

---

---

How do you reach this menu?

Start Meal

Non-job timesheets

---

Non-job purchase orders

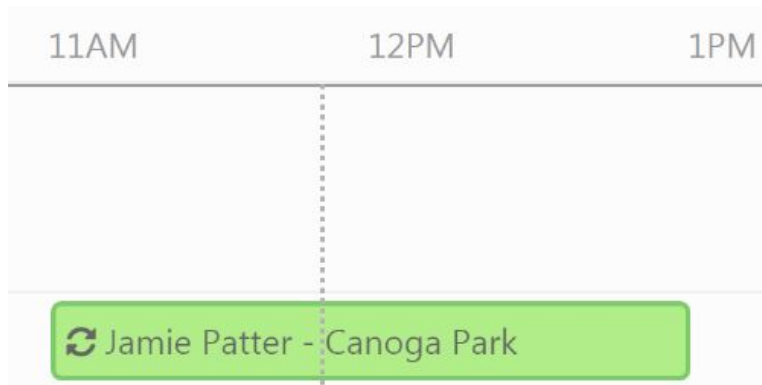
---

Send Message

---

Notes:

# Dispatcher Training Handout



## True or False: Dispatch Board

I can **click and drag a job** on the dispatch board to a new time slot. When I do this, the job will be **rescheduled**. *True / False*

I can **click and drag a job** to assign it to a different technician, **even if the technician is dispatched or working**. *True / False*

I can **shrink or expand the allotted time** for any job or non job appointment. *True / False*

The **dotted line** on the dispatch board indicates **the current time**. *True / False*

At the bottom of the dispatch board, I can see a map that shows the **geographic location of all checked in technicians**. *True / False*

I can **click into any job on the dispatch board**, which will take me to the job screen. *True / False*

I need to click into a job to **place the job on hold**, or **cancel the job**. *True / False*

## Dispatch Board Configurations



### True or False: Dispatch Board Configurations

---

I can check in or check out technicians on the dispatch board (view or change technician **shift start** and **shift end** times). *True / False*

When I enter a **memo** next to a technician, **only I will see this memo (not any other dispatchers)**. *True / False*



I can **check out** a technician on **my dispatch board only**, **without having an impact on other dispatchers**. *True / False*



I can change the **dispatch board view**, so instead of seeing the exact **Street** address of every job, dispatchers will only see the **City** where each job is located. *True / False*

☐ Street  
☒ City

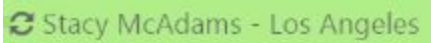
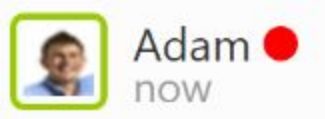
Notes:

## Job Page

How do you close out (complete) a job?



### Step One

Circle the correct step below:

 <p>Click into the job.</p>	<p>Which one is correct?</p>	 <p>Click on the technician's profile picture.</p>
--------------------------------------------------------------------------------------------------------------	------------------------------	--------------------------------------------------------------------------------------------------------------------------------------

### Step Two

Circle the correct step below:

 <p>Click <b>Complete Job</b>, then select <b>Complete Job</b> from the dropdown.</p>	<p>Which one is correct?</p>	 <p>Call the technician to give directions to the next job site.</p>
--------------------------------------------------------------------------------------------------------------------------------------------------------------------------	------------------------------	----------------------------------------------------------------------------------------------------------------------------------------------------------

### Step Three

Circle the correct step below:

<p>Invoice # <input type="text" value="# A123 ..."/></p> <p>Finalize the invoice. Enter the <b>Invoice number</b> and other required invoice details, then click <b>Save</b>.</p>	<p>Which one is correct?</p>	<p>Invoice 158355 Invoice Date 10/10/2016 Completed Date Customer PO</p> <p>You don't need to finalize an invoice to close out a job.</p>
-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------	------------------------------	-------------------------------------------------------------------------------------------------------------------------------------------------------



Briefly describe when you might select each of the job actions below. If you don't think you'll be using this job action, write *N/A*.

Actions ...

▼

Job Actions	x
Assign / Unassign ...	
Dispatch / Cancel Dispatch ...	
Arrive / Done Working ...	
Complete Job ...	
Reschedule ...	
Hold ...	
Cancel ...	
Recall ...	
Warranty ...	
Lead ...	
Purchase Order ...	
Take Survey ...	
Timesheets ...	
Create project ...	

Notes:

# Dispatcher Training Handout

---



List at least **four** different things you can do when you click the **Edit Pencil** on the job screen.

1. \_\_\_\_\_
  2. \_\_\_\_\_
  3. \_\_\_\_\_
  4. \_\_\_\_\_
- 





What happens if you turn job notifications OFF?


\_\_\_\_\_

## Job History

### History









Save


☐ Pin this note to the top


All (8)

 Events (5)

 Calls (1)

 Notes (0)

 Files (4)

 Email (1)

I need to . . .

Where in the job history would I click?

See how many times this job has been rescheduled.	
Listen to a previous call related to this job.	
See if an estimate was emailed to the customer.	
Review a completed inspection form.	
Pin a note to the top of the job history.	
View previous job notes.	

## Timesheets

### Timesheets

From  To  Technician

Describe an example of a <b>non-job timesheet</b> :	
Where do you go to <b>add or edit non-job timesheet entries</b> ?	
Where do you go to <b>add or edit job-related timesheet entries</b> ?	

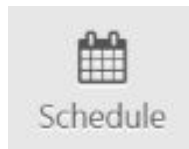
## Purchase Orders

### Purchase Orders

From  To  Technician

Describe an example of a <b>non-job purchase order</b> :	
Where do you go to enter a <b>non-job purchase order</b> ?	
Where do you go to enter a <b>job-related purchase order</b> ?	

## Schedule



List at least **three** examples of when you might use the schedule board **instead of the dispatch board**.

1. \_\_\_\_\_

2. \_\_\_\_\_

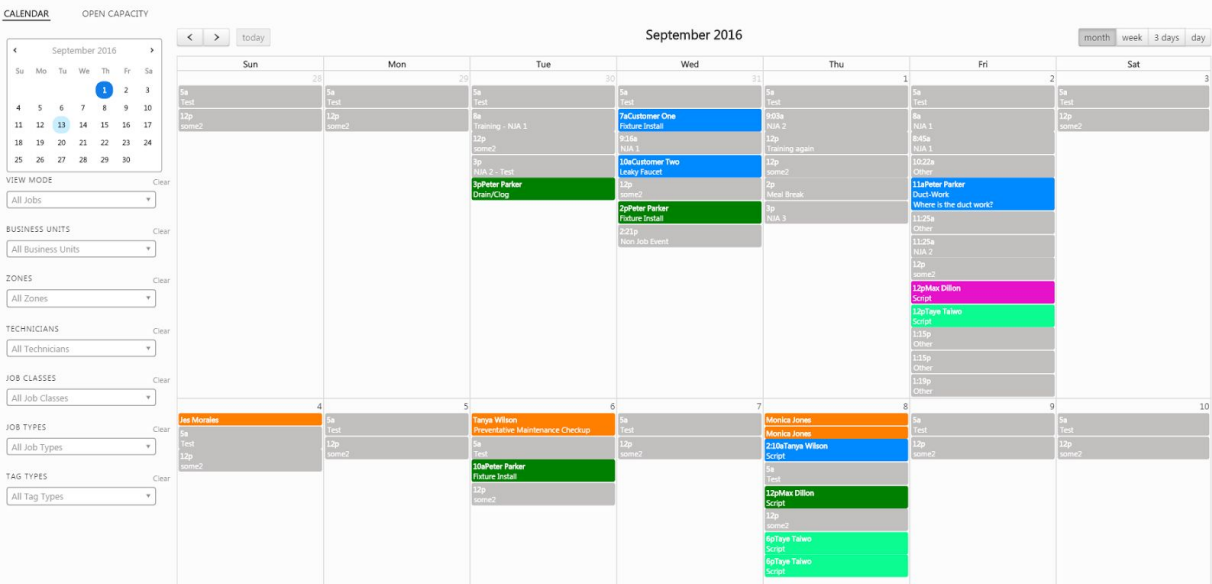
3. \_\_\_\_\_

---

Notes:



# Dispatcher Training Handout



## True or False: Schedule Board

I can set the schedule board to a **weekly or monthly view**.

*True / False*

I can set the schedule board to a **three day view**.

*True / False*

The schedule board expands to **fit the size of my screen.**

*True / False*

When I **click a date on the calendar**, the schedule board will **change to a one day view**.

*True / False*

I can **select multiple filters** (for example, two different tag types).

*True / False*

I can **click into** any job on the schedule board.

*True / False*

I can use the schedule board to **see the schedule for a single technician.**

*True / False*

The schedule board **will** show me **whether a job has been dispatched**.

*True / False*

## Office or Mobile?

Check the boxes that apply.  
Answers may vary depending on  
your company's best practices.



Action	Usually completed <b>from the office</b> (ServiceTitan desktop)	Usually completed <b>by technicians in the field</b> (ServiceTitan Mobile)	<b>Both the office and technicians</b> do this regularly
<i>Schedule job</i>			
<i>Assign technician to the job</i>			
<i>Dispatch technician to the job</i>			
<i>Place technician on a meal break</i>			
<i>Add a purchase order to the job</i>			
<i>Check in the technician</i>			
<i>Send and receive SMS through ServiceTitan</i>			
<i>Review the job history</i>			
<i>Finalize the invoice</i>			
<i>Have the customer sign the estimate or invoice</i>			

*Notes:*