

Creating and Managing Tickets in Dispatcher

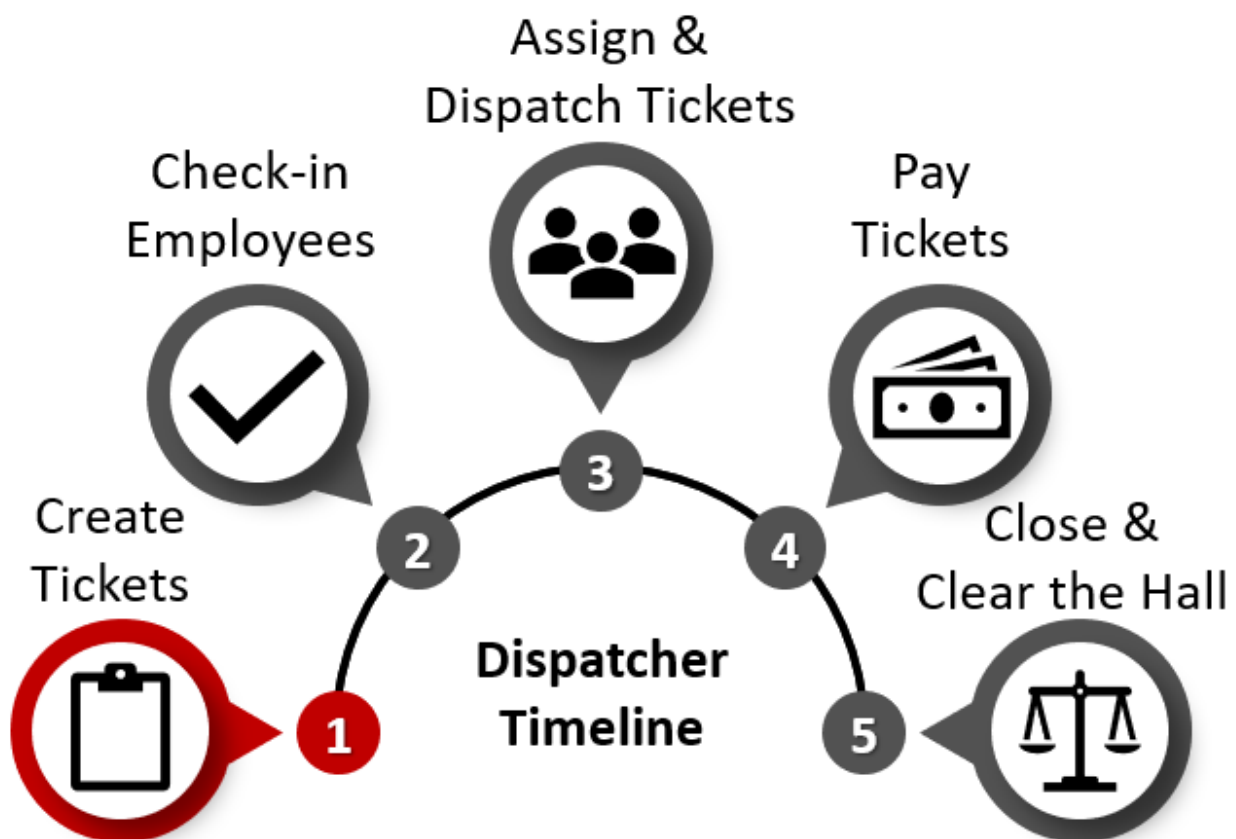
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What are Tickets?

Tickets in Dispatcher are orders, or requests from a customer for employees. i.e. I need 4 warehouse workers today. In Dispatcher, these tickets are only for a single day of work.

Not sure what Dispatcher is? Check out [Dispatcher Overview](#) first.

Creating a ticket is Step 1 in the Dispatcher timeline:



To Create a Ticket

1. Select the + icon in the upper right corner of the orders section of Dispatcher.

2. Enter the following required information:

- Customer Name
- Worksite (worksite must first be set up on the customer record before it can be selected here)
- Job Title
- Number Required

The screenshot shows a 'new ticket' form with the following fields and values:

Customer	Buy N Large		
Customer Id	4295013744		
Worksite	Warehouse B		
Job Title	Warehouse Worker		
Order Type	Daily Pay / Labor		
Supervisor	Burton, Hal		
Shift	AM shift		
Start Date	11/5/2018		
Start Time	8:00 AM	End Time	4:00 PM
Worker Comp Code	W18818		
Number Required	3	Pay Periods	52
Multiplier Code	1.57		
Pay Rate	\$20.00	Bill Rate	\$31.40
PO Number	\$12394		

3. Optionally, enter the following details:

- Shift or start and end time.
- Start date if other than today.
- Pay information
 - Utilize multiplier code to calculate bill rate from the pay rate.
 - Or use [rate sheets](#) to set up default pay and bill rates for customers or

job titles.

- Select a PO Number.
4. Enter any additional information in the bottom notes box.
 5. Select 'Save.'

Note Want more information to auto-fill for you? Check out [How to Set Up Customer Defaults](#) to begin setting up your default information by customer.

Managing Tickets

Once a ticket is created, there are a lot of different options you can utilize.

This section covers:

1. [Edit a Ticket](#)
2. [Cancel a Ticket](#)
3. [Repeat a Ticket](#)
4. [Navigate to related records](#)
5. [Log Messages](#)

Make a mistake or need to add some more details?

1. Double click on the ticket **OR** right click on a ticket and select 'Edit Ticket' to open the ticket.
2. Make your edits before selecting 'Save.'

📁 edit ticket

Customer	Buy N Large		
Customer Id	4295013744 <input type="text"/>		
Worksite	Lightyear Assembly		
Job Title	Warehouse Worker		
Order Type	Daily Pay / Labor		
Supervisor	Newton, Teddy		
Shift	AM shift		
Start Date	11/5/2018		
Start Time	8:00 AM	End Time	4:00 PM
Worker Comp Code	MN 8810		
Number Required	4	Pay Periods	52
Multiplier Code	1.60		
Pay Rate	\$12.00	Bill Rate	\$19.20
PO Number	12345685		
<div style="border: 1px solid #ccc; padding: 5px; min-height: 100px;"> <p>Must be able to lift 50 lbs.</p> </div>			

Note Customer Name can not be changed once an order is created. If the wrong customer was selected, cancel the ticket and create a new ticket under the correct customer.

Note Worksite can not be changed from Dispatcher. Right click on the order and select view order to update the worksite information on the full order record.

Cancel a Ticket

Made a ticket by mistake? Did the customer change their mind?

You can cancel a ticket to remove it from the Dispatcher queue.

1. Right click on the ticket you wish to cancel.

2. Select 'Cancel Ticket.'
3. A new window will open, select 'Yes' to confirm the cancellation.

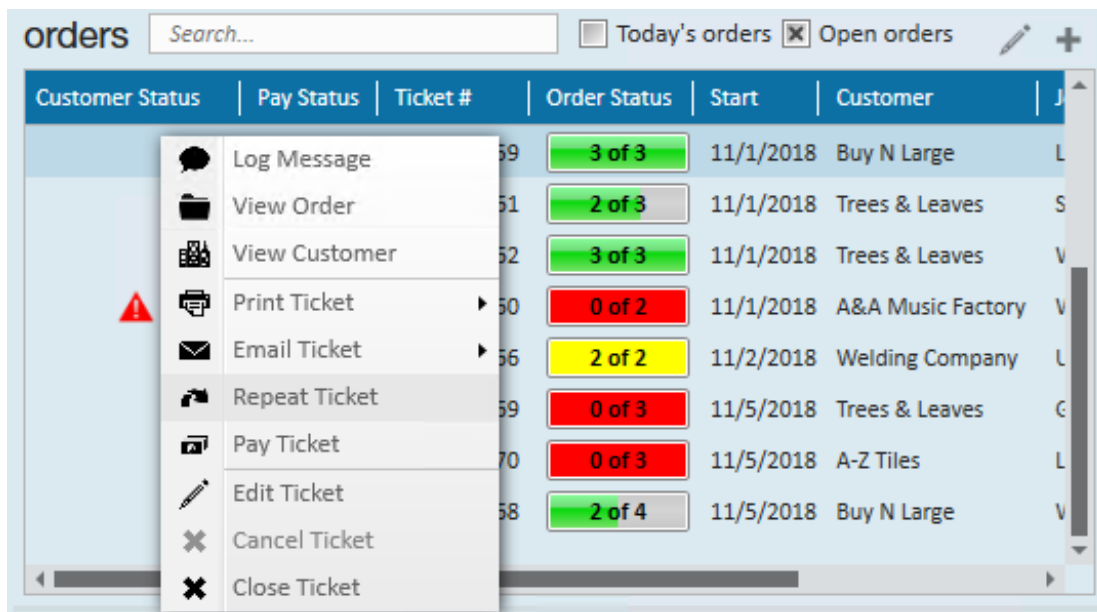
Note Editing or cancelling tickets once an order has been printed/mailed will generate a warning that the ticket has already been printed/mailed if any changes to the order or assigned employees are attempted. Any changes that have been made to the order will result in the status bar reverting back to the proper status once changes have been made.

Repeat a Ticket

When your customer asks for workers to come back or want a similar order, you can save time by repeating the existing ticket.

To repeat a ticket:

1. Right click on the ticket you wish to repeat.
2. Select 'Repeat Ticket.'



3. A new window will open. Enter the following information:

repeat ticket

Repeat Date: 11/9/2018

Required: 3

- Select the date you want this ticket repeated on.
- Optionally, change the number of people required for the new ticket.

4. If the original ticket had employees assigned, you will have 3 check boxes next to each employee:

? X

repeat ticket

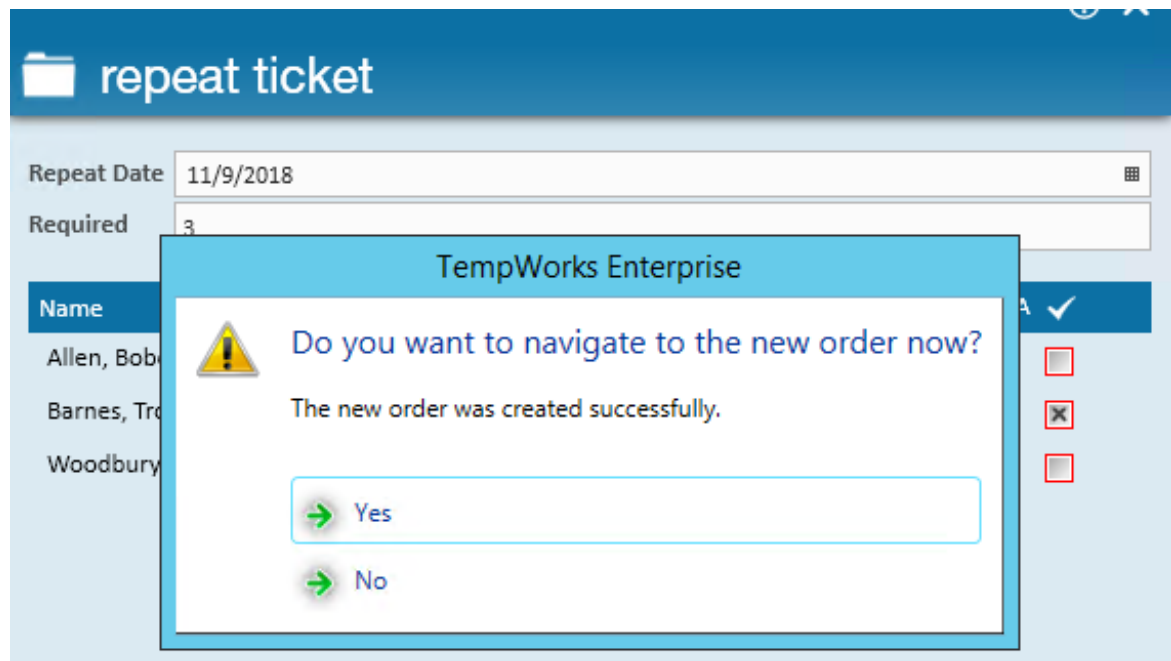
Repeat Date

Required

Name	Reg Hours	OT Hours	Repeat ✓	Direct ✓	DNA ✓
Allen, Bobo j	0	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Barnes, Troy	0	0	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Woodbury, Andrew	0	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

0
 Save

1. By default, these employees will be assigned to the new ticket. Uncheck the repeat box if you do not want to have the employee assigned to the repeated ticket
2. Check the direct checkbox if the employee will be going directly to the worksite without coming back to check-in first.
3. Check the DNA box when the customer asks that the employee not return or if the employee does not want to work for that customer again.
5. Select 'Save' to create the new ticket.
6. A new window will open. Select 'Yes' to be navigated to the full order record or 'No' to return to the screen you were previously on.

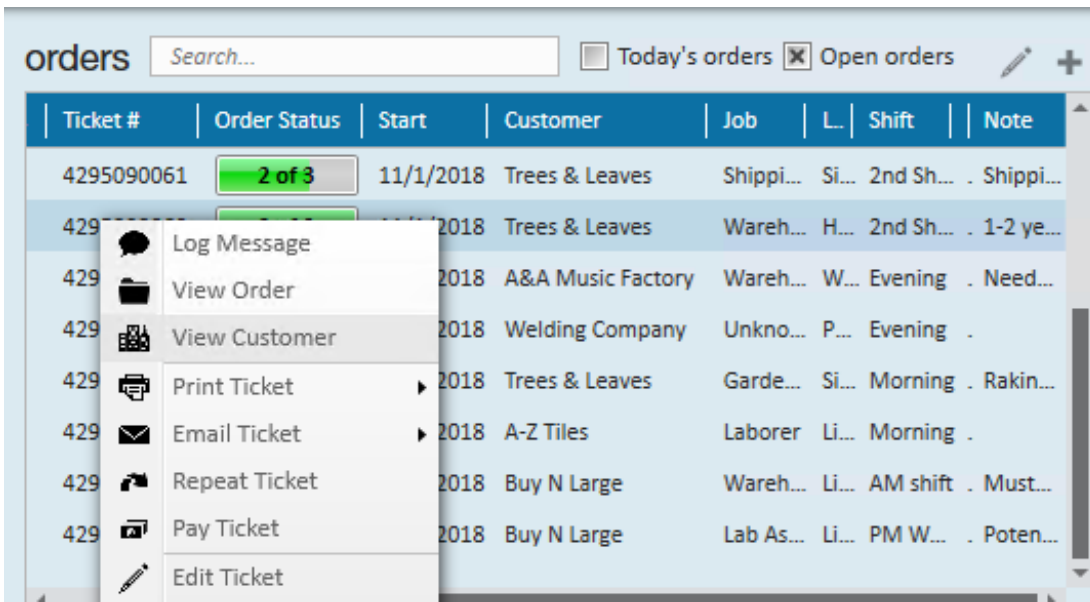


Note Repeat tickets will be displayed in the orders (ticket) area with a full yellow order status bar. Employees who have been asked to be repeated will automatically be "attached" to the order.

Navigate to Related Records

Want to see more details of an order or need to check out customer information?

Right click on a ticket and select 'View Order' to jump to the full order record or 'View Customer' to jump to the Customer record tied to the ticket.

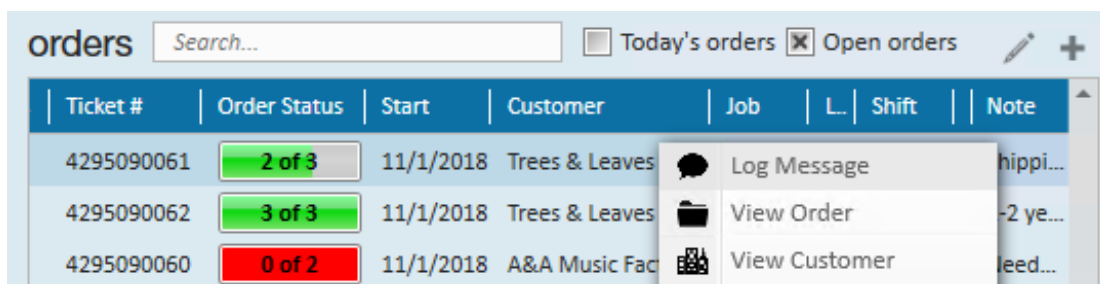


Logging a Message

When new information arises about this ticket, you may want to utilize the message option to log a new message for everything from a change in supervisors to an employee showing up late.

To log a message:

1. Right click on the ticket you want to log a message for:



2. Select 'Log Message.'
3. Select a message action code that best represents the message you are logging.
4. Write out the details of the message in the main section:

message

Action

Ash Timber called with more details for this order.
May want to repeat order later this week.

Details Attachments

Date/Time	11/6/2018 11:18:01 AM
Rep Name	amelia.stout
Link Employee	<input type="text"/>
Link Contact	Timber, Ash
Customer	Trees & Leaves
Link Order	4295090061
Link Assignment	<input type="text"/>

follow-up
There are currently no follow-up items for this message.

- create a task
- schedule an appointment

0 Post

5. Select 'Post' to log the message to the customer and order records.

For more tips on logging messages: [Tips for Message Logging](#) .

Related Articles