

Crew Planner

Last Modified on 03/06/2022 2:10 pm EDT

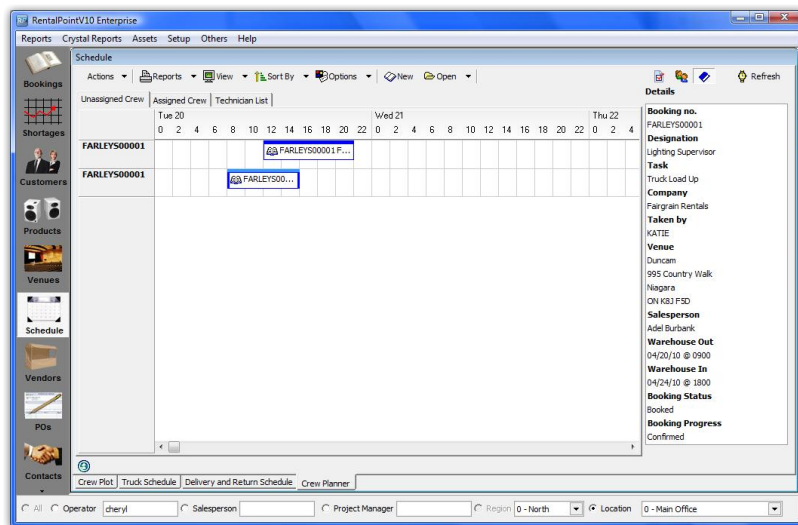
Table of Contents

- Crew Planner
 - Assigned Crew Tab
 - Technician List Tab
 - Qualified Technicians
 - Freelance Technicians
 - Auto Emailing Technicians
- Crew Shortages Tab
 - Small Time Shortage
 - Activity Shortages
 - Booking Shortages
 - Crew Shortage
 - Additional Options on Crew Shortage Tab Filter
 - Conflict Checkbox
- View Crew Assignments
- SMS Kapow
 - Initial Setup
 - RentalPoint Setup

Crew Planner

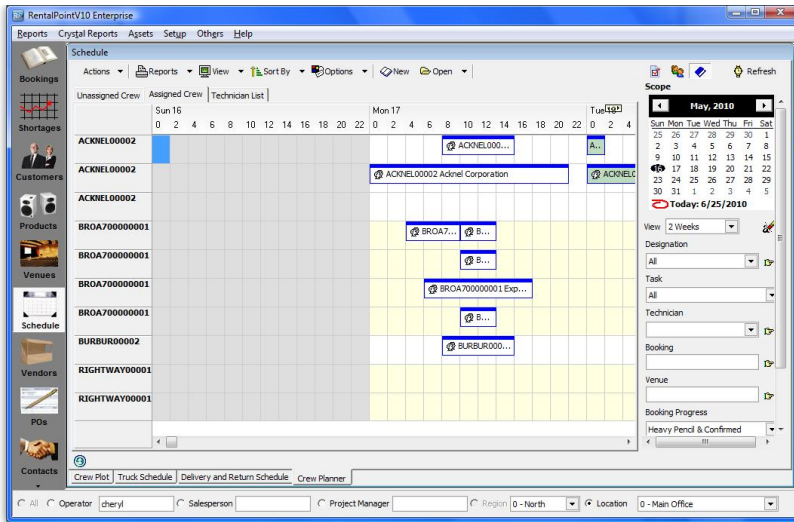
The Crew Planner Module provides a central location to manage crew assignments for multiple jobs and maintain technician schedules. The interactive calendar displays crew requirements and assignments allowing operators to quickly view crew for a given period. The scopes allow operators to take a detailed look at bookings, crew and times and view options on the same screen. You can edit the dates and times of crew assignments by dragging the assignment or expanding the begin and end times of the assignments.

The Unassigned Crew tab contains all crew entries that do not have a technician assigned to them.



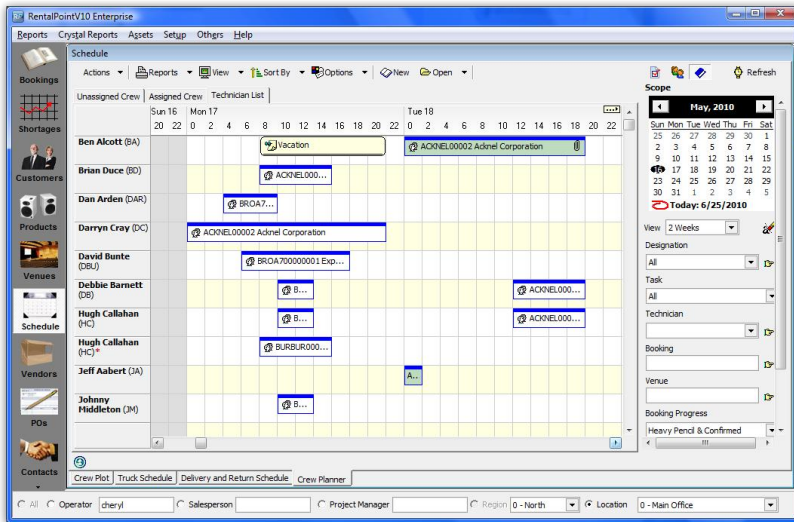
Assigned Crew Tab

The Assigned Crew tab contains all crew entries that have a technician assigned to them.



Technician List Tab

The Technician List tab lists all technicians with assignments in alphabetical order.

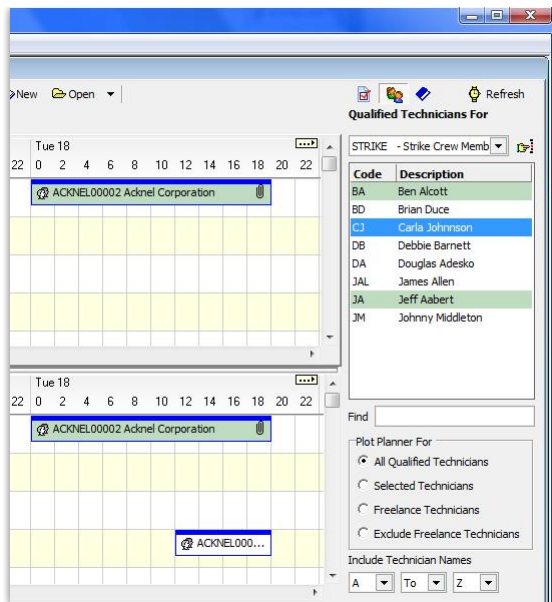


Qualified Technicians

In each of the main areas (Unassigned, Assigned and Technician List), you can activate a qualified technician grid that will display in the bottom half of the screen. This grid will list the technicians that are qualified to perform the designation selected from the top grid. This aids in quickly identifying crew members and assigning appropriate tasks.

Freelance Technicians

During scheduling you may notice some technicians are highlighted in green. This signifies that the technician is a freelancer. Operators can easily identify in-house or out-sourced technicians. If a technician is outsourced and a PO or cross rental is required, it can be raised from within the crew planner. A small attachment icon will display on the crew assignment and can be accessed directly from the crew planner.



Auto Emailing Technicians

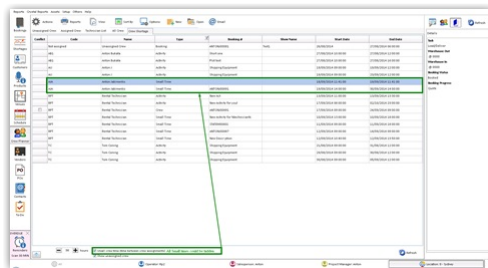
With Crew Parameter 19 set to YES, this feature auto emails technicians when their assignments change. Technicians must have a valid email address entered and the 'Send Emails' option turned on in their contacts record.

Crew Shortages Tab

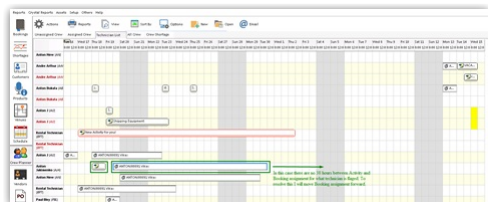
The Crew Shortage tab displays information about conflicts between crew assignments or activities in which technicians are involved. There are no additional parameters for crew shortages. There are four types of shortages displayed in the Crew Shortage tab.

Small Time Shortage

Small Time is the time that a technician needs to move from one job to another. You can hide these shortages by unchecking the **Small Time** scope checkbox. The Small Time value is determined by technician.



To resolve Small Time shortages you need to double click on a Small Time row. You will be moved to the Technician List. In this grid, you will be able to move the conflicting items.



Note. Be careful that you don't create new shortages whilst resolving Small Time shortages.

Activity Shortages

This is a conflict between two activities. It occurs when two activities with same technician assigned overlap each other.

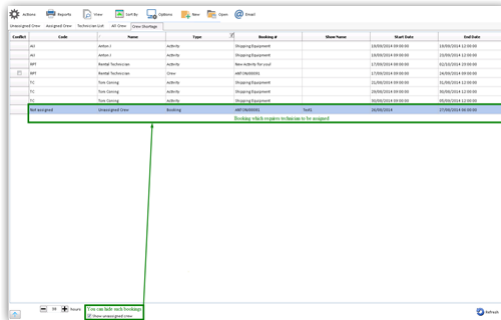
| CrewID | Code | Unassigned Crew | Name | Type | Building # | Show Name | Start Date | End Date |
|--------|------|-------------------------------------|--------------|------------------|--------------------|----------------|---------------------|---------------------|
| | | <input type="checkbox"/> | Not assigned | Building | ABT0000001 | Tech1 | 16/06/2014 | 27/06/2014 06:00:00 |
| AB1 | | <input checked="" type="checkbox"/> | Anton Bukata | Clear Technology | Activity | Front Activity | 27/06/2014 | 29/06/2014 |
| AB2 | | <input checked="" type="checkbox"/> | Anton Bukata | Fix Laser Beam | Activity | Technical Crew | 27/06/2014 | 29/06/2014 |
| AB3 | | <input type="checkbox"/> | Anton J | Activity | Shipping Equipment | | 16/06/2014 09:00:00 | 16/06/2014 12:00:00 |
| AB4 | | <input type="checkbox"/> | Anton J | Activity | Shipping Equipment | | 16/06/2014 09:00:00 | 16/06/2014 12:00:00 |
| AB5 | | <input type="checkbox"/> | Anton J | Activity | Shipping Equipment | | 16/06/2014 09:00:00 | 16/06/2014 12:00:00 |
| AB6 | | <input type="checkbox"/> | Anton J | Activity | Shipping Equipment | | 16/06/2014 09:00:00 | 16/06/2014 12:00:00 |
| AB7 | | <input type="checkbox"/> | Anton J | Activity | Shipping Equipment | | 16/06/2014 09:00:00 | 16/06/2014 12:00:00 |
| AB8 | | <input type="checkbox"/> | Anton J | Activity | Shipping Equipment | | 16/06/2014 09:00:00 | 16/06/2014 12:00:00 |
| AB9 | | <input type="checkbox"/> | Anton J | Activity | Shipping Equipment | | 16/06/2014 09:00:00 | 16/06/2014 12:00:00 |
| AB10 | | <input type="checkbox"/> | Anton J | Activity | Shipping Equipment | | 16/06/2014 09:00:00 | 16/06/2014 12:00:00 |
| AB11 | | <input type="checkbox"/> | Anton J | Activity | Shipping Equipment | | 16/06/2014 09:00:00 | 16/06/2014 12:00:00 |
| AB12 | | <input type="checkbox"/> | Anton J | Activity | Shipping Equipment | | 16/06/2014 09:00:00 | 16/06/2014 12:00:00 |
| AB13 | | <input type="checkbox"/> | Anton J | Activity | Shipping Equipment | | 16/06/2014 09:00:00 | 16/06/2014 12:00:00 |
| AB14 | | <input type="checkbox"/> | Anton J | Activity | Shipping Equipment | | 16/06/2014 09:00:00 | 16/06/2014 12:00:00 |
| AB15 | | <input type="checkbox"/> | Anton J | Activity | Shipping Equipment | | 16/06/2014 09:00:00 | 16/06/2014 12:00:00 |
| AB16 | | <input type="checkbox"/> | Anton J | Activity | Shipping Equipment | | 16/06/2014 09:00:00 | 16/06/2014 12:00:00 |
| AB17 | | <input type="checkbox"/> | Anton J | Activity | Shipping Equipment | | 16/06/2014 09:00:00 | 16/06/2014 12:00:00 |
| AB18 | | <input type="checkbox"/> | Anton J | Activity | Shipping Equipment | | 16/06/2014 09:00:00 | 16/06/2014 12:00:00 |
| AB19 | | <input type="checkbox"/> | Anton J | Activity | Shipping Equipment | | 16/06/2014 09:00:00 | 16/06/2014 12:00:00 |
| AB20 | | <input type="checkbox"/> | Anton J | Activity | Shipping Equipment | | 16/06/2014 09:00:00 | 16/06/2014 12:00:00 |
| AB21 | | <input type="checkbox"/> | Anton J | Activity | Shipping Equipment | | 16/06/2014 09:00:00 | 16/06/2014 12:00:00 |
| AB22 | | <input type="checkbox"/> | Anton J | Activity | Shipping Equipment | | 16/06/2014 09:00:00 | 16/06/2014 12:00:00 |
| AB23 | | <input type="checkbox"/> | Anton J | Activity | Shipping Equipment | | 16/06/2014 09:00:00 | 16/06/2014 12:00:00 |
| AB24 | | <input type="checkbox"/> | Anton J | Activity | Shipping Equipment | | 16/06/2014 09:00:00 | 16/06/2014 12:00:00 |
| AB25 | | <input type="checkbox"/> | Anton J | Activity | Shipping Equipment | | 16/06/2014 09:00:00 | 16/06/2014 12:00:00 |
| AB26 | | <input type="checkbox"/> | Anton J | Activity | Shipping Equipment | | 16/06/2014 09:00:00 | 16/06/2014 12:00:00 |
| AB27 | | <input type="checkbox"/> | Anton J | Activity | Shipping Equipment | | 16/06/2014 09:00:00 | 16/06/2014 12:00:00 |
| AB28 | | <input type="checkbox"/> | Anton J | Activity | Shipping Equipment | | 16/06/2014 09:00:00 | 16/06/2014 12:00:00 |
| AB29 | | <input type="checkbox"/> | Anton J | Activity | Shipping Equipment | | 16/06/2014 09:00:00 | 16/06/2014 12:00:00 |
| AB30 | | <input type="checkbox"/> | Anton J | Activity | Shipping Equipment | | 16/06/2014 09:00:00 | 16/06/2014 12:00:00 |

To resolve Activity shortages, double click on an Activity row. You will be moved to the Technician List. In this grid, you will be able to move the conflicting Activities.

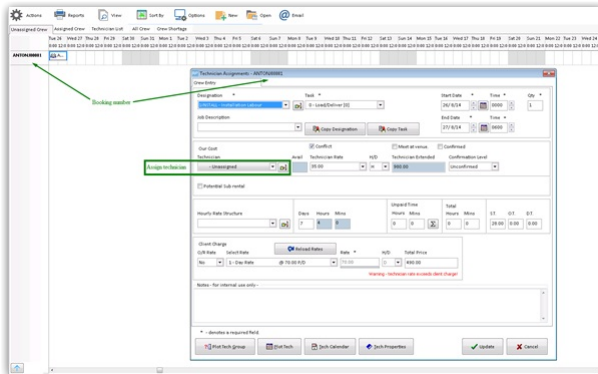


Booking Shortages

This shortage type occurs only when you have a technician assignment with no technician assigned. You can hide these shortages by unchecking the Unassigned Crew checkbox scope.



To resolve this shortage type, double click on the Unassigned Crew row. You will be moved to the Unassigned Crew tab. The system will display the Technician Assignment. Double click to open the assignment. Select a technician for the assignment.

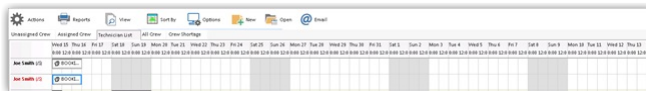


Crew Shortage

This shortage occurs when you have the same technician assigned for two different jobs at the same time or overlapping time between them.

| CrewID | Code | Unassigned Crew | Name | Type | Building # | Show Name | Start Date | End Date |
|--------|------|-------------------------------------|--------------|----------|------------|-----------|---------------------|---------------------|
| | | <input type="checkbox"/> | Not assigned | Building | ABT0000001 | Tech1 | 16/06/2014 | 27/06/2014 06:00:00 |
| AB | | <input checked="" type="checkbox"/> | Joe Smith | Clear | ABT0000001 | | 16/06/2014 09:00:00 | 16/06/2014 12:00:00 |
| AB | | <input checked="" type="checkbox"/> | Joe Smith | Clear | ABT0000002 | | 16/06/2014 09:00:00 | 16/06/2014 12:00:00 |

In this example Joe has an assignment for two jobs, which are overlapping. To resolve it double click on one of this rows – you will be moved to Technician List tab. Drag and drop the assignments to resolve the shortage.



Additional Options on Crew Shortage Tab Filter

You can apply a filter to the main grid.

| Type | Booking # |
|------------|-------------------------------|
| Activity | |
| Activity | |
| Activity | |
| Activity | |
| Activity | |
| Booking | ANTONJ00080 |
| Crew | ANTONJ00091 |
| Crew | BOOKINGC00001 |
| Crew | BOOKINGD00002 |
| Small Time | |
| Small Time | ANTONJ00087 |
| Small Time | ANTONJ00091 |
| Small Time | New Act |
| Small Time | New Activity for %technician% |
| Small Time | STATEM00001 |

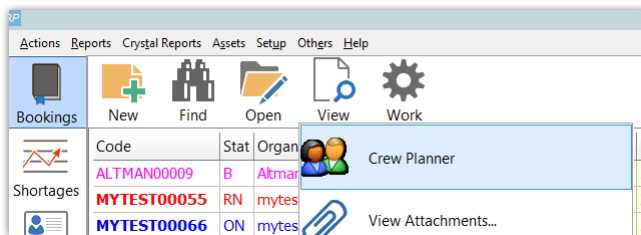
Conflict Checkbox

You can manually force a conflict by selecting the **Conflict** checkbox. Only Crew Type shortages may be flagged as a manual conflict. This conflict may be used to flag conflicts on technicians where the tech may have a personal reason to not accept the assignment/activity invitation.

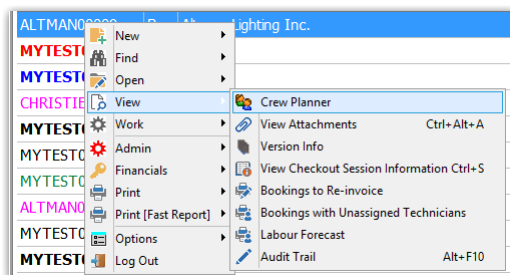
*Note that you cannot change activities that were auto-generated by the truck schedule. You should use truck schedule or delivery and return schedule to resolve such conflicts.

View Crew Assignments

Click VIEW on the Bookings tab Menu and choose Crew Planner to see crew assignment dates of selected booking.



OR right click on the booking, click View-->Crew Planner



SMS Kapow

This feature allows operators to send text messages to technicians confirming their assignments

Initial Setup

1. Create an account on SMS service 'KAPOW' <http://www.kapow.co.uk/index.html>
2. Set up your sending options via <https://www.kapow.co.uk/user.html?view=sendingoptions>

Optional Settings Are:

- Change your 'from-id'. It is set to 'kapow.co.uk' by default (it is a paid service)
- Add trusted Email Addresses
- Set SMS parameters

Caution: SMS parameters (Long SMS) defines how long your messages could be (maximum 9 parts, 153 characters each). Messages longer than the set length will be truncated.

RentalPoint Setup

1. Go to Parameters – Cloud setup – SMS Kapow Account.
2. Enter your User Name and Password from Kapow Account:

Setup Company Cloud Account

Enter the details for the company cloud account.

Google Account Parameters

Client ID

Client Secret

Docs Cloud Saving Parameters

Use Company Cloud

Save Docs Settings

Save docs to Google drive

Save docs locally and carbon copy to cloud

SMS Kapow Account

User Name

KapowLogin

Password

KapowPassword

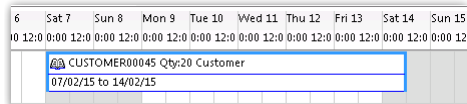
OK Cancel

Module Functionality and Usage

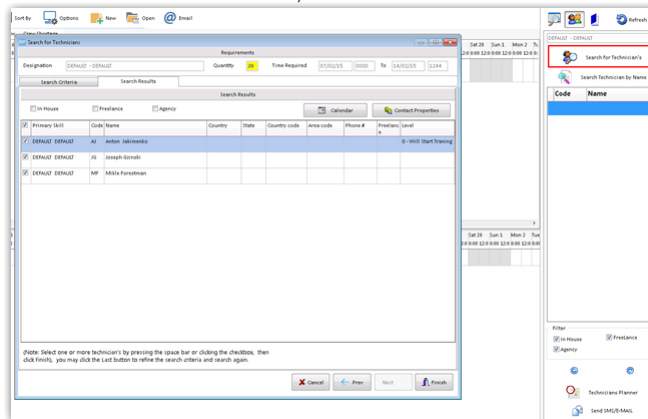
Send SMS is accessed from Crew Planner.

Open as follows:

- Select a crew task via Crew Planner tabs



- Search for technicians who will suit your task best



- Selected technicians will be listed in "Assign Qualified Technicians" form.
- Click on 'Send SMS/E-MAIL' button

Send SMS tab

Send SMS

| Code | Name | Phone | Email | Send Result |
|-------------------------------------|--------------------|-------------|--------------------|-------------|
| <input checked="" type="checkbox"/> | MR Mikie Foreman | | | |
| <input checked="" type="checkbox"/> | JG Joseph Gzinski | | | |
| <input checked="" type="checkbox"/> | AJ Anton Jakimenko | 38068716582 | cadet@vikas.com.ua | |

recipients list

Template

Hi, {TechName}
 Are you available from {DateFrom} till {DateTo}
 "{Customer}" needs you at our {ShopAddress}
 Your task is going to be {Description}

Fill your template with any information, to check click this button →

Test Template

Send SMS

Send Email

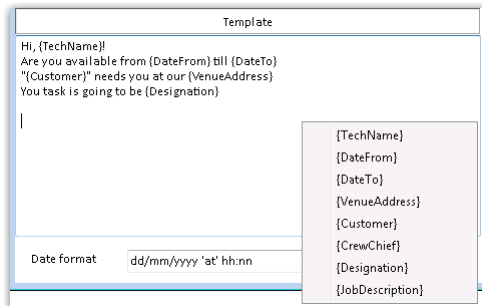
Exit

Date format: dd/mm/yyyy'at' hh:nn Date format could be changed

Template parameters:

- {TechName} – Technician full name
- {DateFrom} – Date and time task starts
- {DateTo} – Date and time task ends
- {VenueAddress} – Shows Venue name, Street, Suburb, City
- {Customer} – Customer Code
- {CrewChief} – Crew Chief full name
- {Designation} – Designation
- {JobDescription} – Job Description

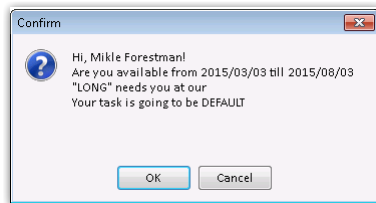
To insert parameters – right click in Template field:



To change Date format to default – right click in Date format field:

Phone and Email could be manually changed via Send SMS tab (but will not be saved on next open), also you could double click on a row and make an adjustment in the contact record.

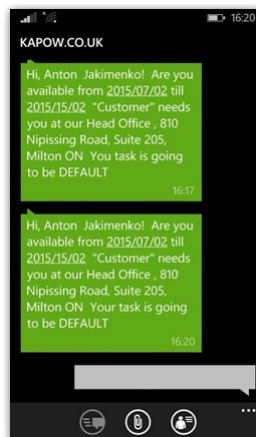
Test your template before sending by clicking 'Test Template' button:



If everything is fine, just click on 'Send SMS' button/Send Email:

| <input type="checkbox"/> | Code | Name | Phone | Email | Send Result |
|-------------------------------------|------|-----------------|--------------|--------------------|--------------------|
| <input checked="" type="checkbox"/> | MF | Mikle Forestman | | | Phone not assigned |
| <input checked="" type="checkbox"/> | JG | Joseph Gzinski | | | Phone not assigned |
| <input checked="" type="checkbox"/> | AJ | Anton Jakimenko | 380667165082 | cadet@vikas.com.ua | OK |

If Send Result was populated with "OK" – the message has been received:



Troubleshooting: If you don't get an "OK" for Send Result then an error occurred.

- Double check The following:
 - Your user name and password via Cloud setup
 - Your internet connection,
 - Number of credits you have in KAPOW.
- If all the above looks alright - you need to click on a send result field and copy error message, it could be like:

USERPASS=ren&password=pas&mobile=380687165082&sms=Hi,%20Anton%20%20Jakimenko!%0D%0AAre%20you%20avail:

And send it to support@rentp.com