# **Crew Planner**

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# **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.

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### **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.

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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 able to move the conflicting items.

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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.

dict	Code		Same .	Type 7	Booking #	Show Name	Start Date	End Date
	Not assigned	Unassigned Orev		Booking	ANTONUODOBS	Text1	26/08/2014	27/08/2014 06:00:00
- 1	Að1	Anton Bukata	One technician have two activities	ACENTY	First.Activity		27/08/2014	29/08/2014
	A81	Anton bukata		Activity	Second One		27/08/2014	29/08/2014
	NJ	Anton J		Activity	Shipping Equipment		19/09/2014 09:00:00	18/09/2014 12:00:00
	NJ	Aeton J		Alberty	Shipping Equipment		19/09/2014 09:00:00	23/09/2014 12:00:00
	AJA	Anton Jakimenko		Small Time			18/09/2014 11:41:00	19/09/2014 11:41:00
	AJA	Anton Jakimenko		Small Time	ANT CAUGOD 91		19/09/2014 14:00:00	30/09/2014 14:00:00
	APT .	Restal Technicia	e	Adhilty	New Act		13/09/2014 11:00:00	13/09/2014 13:30:00
	891	Rental Technicia	n	Activity	New Activity for you!		17/09/2014 08:00:00	02/10/2014 23:00:00
8	891	Restal Technicia	e	Grew	ANT CRU00091		17/09/2014 09:00:00	24/09/2014 09:00:00
	891	Rental Technicia	e	Small Time	New Activity for NitechnicianN		10/09/2014 19:00:00	51/09/2014 18:00:00
	191	Rental Technicia	n	Small Time	5547EM00005		11/09/2014 09:00:00	11/09/2014 18:00:00
	RPT .	Restal Technicia	e	small filme	ANT CRU00087		12/09/2014 09:00:00	14/09/2014 09:00:00
	891	Rental Technicia	n	Small Time	New Description		12/09/2014 10 40:00	12/09/2014 13:50:00
	τc	Tom Coning		Admity	Shipping Equipment		21/08/2014 09:00:00	31/08/2014 12:00:00
	тс	fors Coning		Adhrity	Shipping Equipment		29/08/2014 09:00:00	30/08/2014 12:00:00
	TC	Tom Coning		Activity	Shipping Equipment		50/08/2014 09:00:00	05/09/2014 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 able to move the conflicting Activities.

Anton Bukata (4B First Activity Re	d indicates that this hnician is short				
Anton Bukata (48 Second One	Tor	esolve this I wll drag second item forward			

## **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.

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Unassigned	Crew Assigned Crew	Technician Ust	All Crew Crew Shortage						
Conflict	Code		Name	Type	30	Booking #	Show Name	Start Date	End Date
	1	Joe Smi	<i>t</i> h	Orew	80062	w6C00005		15/30/2014 08:41:00	14/10/2014 19:41:00
	5	Joe Smi	<i>b</i> i	Orew	80067	w6000002		15/10/2014 07:91:00	16/10/2014 19:31:00

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.

* 40000	le lagoris	Vew Vew	iort by	Cottors	<b>1</b> 4 Ser	<b>1</b> - 100	- @ t-															
Unassigned Crev	Assigned Grew	Technician List	All Grew Grew	Shortage																		
	Wed 15 Thu 36 0	Vi 17 Set 18 Sun 100 12:0 0:00 12:0 0:00	13 Mon 28 Tue 2 12:0 0:00 12:0 0:00	11 Wed 22 Thu 23 12:0 0:00 12:0 0:00 12:	Pri 24 Sut	25 Sun 26 12:0 0:00 12:0	Mon 27 Tue 2	1 Wed 25 This 24 9 00 \$24 9 0	10 Fe 31	5413 10 0 00 12	5un 2 # 8.84 12	Mon 3 0 0.00 12:0	Tue 4 0.00 32-0	1996 d 5 8:00 32:0	Thu 6 8:00 \$2:0	Pei 7 0.00 12:0	5at 8 0.00 12:	Sun 9	Mon 38 0 0:00 32	Tue 11	Vied 32 8 9.44 12	Thu 13
Ave Smith (1)	Ø 80041																					
Joe Smith (13	Ø 80041.																					

# Additional Options on Crew Shortage Tab Filter

You can apply a filter to the main grid.

🛆 Туре	Booking #     Small Time"	
Activity	Activity     Booking	
Activity	Crew	
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.

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Actions Re	ports Crys <u>t</u> al Reports	A <u>s</u> sets	Set <u>u</u> p	Oth <u>e</u> rs <u>H</u> el	р	
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OR right click on the booking, click View-->Crew Planner

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# 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
- $\ensuremath{\texttt{2. Set up your sending options via https://www.kapow.co.uk/user.html?view=sendingoptions via https://www.kapow.co.u$

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
③ Save docs to Google drive
Save docs locally and carbon copy to cloud
SMS Kapow Account
User Name
KapowLogin
Password
KapowPassword
✓ OK X Cancel
V OK 👗 Cancer

#### Module Functionality and Usage

Send SMS is accessed from Crew Planner.

Open as follows:

- Select a crew task via Crew Planner tabs 6 Sat 7 Sun 8 Mon 9 Tue 10 Wed 11 Thu 12 Fri 13 Sat 14 Sun 15 10 12:0 0:00 12:0 0:00 12:0 0:00 12:0 0:00 12:0 0:00 12:0 0:00 12:0 0:00 12:0 0:00 12:0 0:00 12:0 0:00 12 @3 CUSTOMER00045 Qty:20 Customer 07/02/15 to 14/02/15 Search for technicians who will suit your task best Sort by 🖵 Options 📭 New 🐂 Open @ Ema 🗊 😫 🚺 🖏 Refres Search for Technicians \$0 DEFAULT - DEFAULT Onteria Search Results 20 uired 07/02/15 Designation Code Name In House Trimary Skill Country code Area code 
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   Al
   Anton Jakimenki

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   Anton Jakimenki
   Sat28 Sun 1 Mo Note: Select one or more technician's by pressing the space bar or clicking the checkbox, then dick finish, you may click the Last button to refine the search orteria and search again. 0 🗶 Cancel 🤄 Prev Next 🚺 Finish 0,
- Selected technicians will be listed in "Assign Qualified Technicians" form.
- Click on 'Send SMS/E-MAIL' button

#### Send SMS tab

R/P	Send SMS					
	Code	Name	Phone	Email	Send Result	
2		Mikle Forestman				
2	JG	Joseph Gzinski				
2	AJ	Anton Jakimenko	380687165082	cadet@vikas.com.ua		
	ecipient	s list				
_			Template			
Hi,	TechNam	e)  able from {DateFrom]				
*(0	stomer)*	needs you at our {Ver ing to be (Designatio	ueAddress)	<b>R</b>		
			ormation, to check click this button	Test Template		
						1 5
						se 👔

#### 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:

Template	
Hi, (TechName)! Are you available from (DateFrom) till (DateTo) "(Customer)" needs you at our (VenueAddress) You task is going to be (Designation)	
	{TechName} {DateFrom} {DateTo} {VenueAddress} {Customer}
Date format dd/mm/yyyy 'at' hh:nn	{CrewChief} {Designation} {JobDescription}

#### 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:

Confirm	<b>—</b>
?	Hi, Mikle Forestman! Are you available from 2015/03/03 till 2015/08/03 "LONG" needs you at our Your task is going to be DEFAULT
	OK Cancel

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

2	Code	Name	Phone	Email	Send Result
~	MF	Mikle Forestman			Phone not assigned
2	JG	Joseph Gzinski			Phone not assigned
2	AJ	Anton Jakimenko	380687165082	cadet@vikas.com.ua	ок

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:
  - $\circ~$  Your user name and password via Cloud setup
  - $\circ\;$  Your internet connection,
  - $\circ\;$  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:

And send it to support@rentp.com