



User Conference 2025

Wednesday, October 22nd — Friday, October 24th

Dispatching

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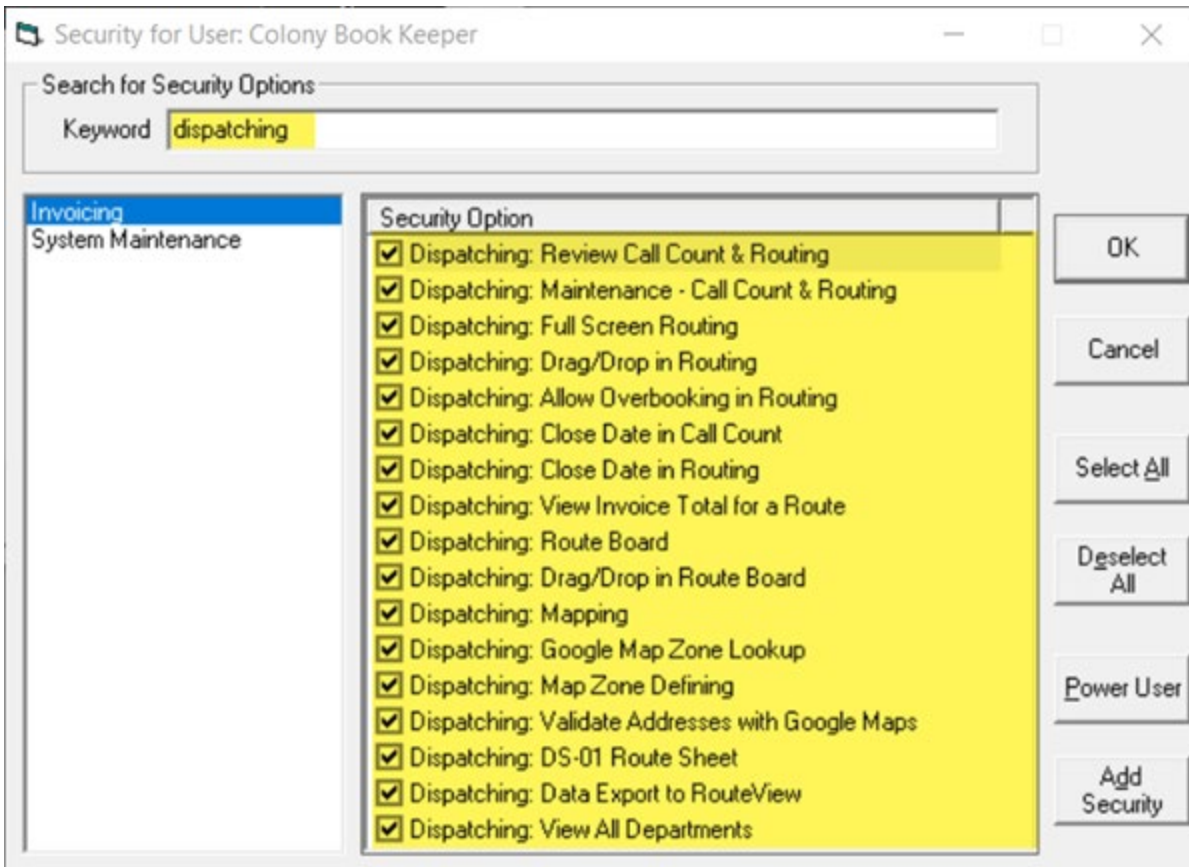
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Security Options for Dispatching

There are several security options that control how users interact with EPASS Dispatching, such as editing calls in the Call Count Calendar or allowing dates to be "overbooked".

To Access the Dispatching Security Options

1. Go to **Tools > System Maintenance**.
2. In the **Tables** tab, locate **User Security**, and then double-click it.
3. Select a User Group from the list, and then click **Security**. The **Security** screen opens.
4. In the **Keyword** search box, enter **Dispatching**.



Dispatching: Review Call Count & Routing/Maintenance - Call Count & Routing

These grant permission to edit or review the Call Count Calendar. You can allow full screen routing but not allow users to drag and drop calls. Even if they can drag and drop calls, they can be prevented from overbooking. The close date function is separated from the routing screen vs call count calendar. This is more to protect staff from accidentally closing the day while in routing. The route board also separates who can drag and drop calls.

Trip Charges and Delivery Fees

When you do deliveries or service calls in further away regions, you can define both the trip charge and the delivery fee to this map zone.

The screenshot shows a window titled "Review Map Zone NAN NANTUCKET". It contains the following fields and sections:

- Code:** NAN
- Description:** NANTUCKET
- Trip Charge Code:** NAN (dropdown menu)
- Delivery Misc Charge:** DELNAN (checkbox) and DELIVERY NANTUCKET (checkbox)
- Dispatching - Call Count:** A table with days of the week and corresponding call counts.

Day	Call Count
Monday	0
Tuesday	0
Wednesday	0
Thursday	0
Friday	0
Saturday	0
Sunday	0
- Department:** A list box with checkboxes for ALL, DELIVERY, SERVICE (selected), and INSTALLATION.

Using this feature is much more practical if you have drawn out your map zones in Google Maps but it work perfectly fine if you manually select the map zone also.

By defining the trip charge, when a service invoice is created, it will populate the trip charge field on the Dispatching tab along with showing it in Mobile Technician. You can also have your invoice print form customized to show the trip charge if desired.

On a sales invoice, once you fill in the delivery date, it will add the misc. code for the delivery. If you change the invoice from delivery to pick up, you will need to remove the misc. line manually.

Review Invoice Type HS IN HOME SERVICE

Settings 1 Settings 2 **Settings 3** Settings 4

☐ Export To Wty Claims
☐ Exclude Warranty Amount from Total
☒ Total open BO Lines
☒ Trip Charge
☐ Delivery Charge

The invoice type must have the above options enabled for these to trigger.

Auto Delivery Charge

Priorities - Maximums and Units

The Priorities tables allow defining a *Maximum per Zone per Day* along with defining how many units this priority occupies. You could restrict the *First Call* priority to 1 per truck per day and you can set a *Compressor* priority to take 3 units.

Edit Priority FIRST FIRST CALL

Code: FIRST

Description: FIRST CALL

Color: ■

First Call: ☐

Last Call: ☐

Disp Units: 1

Maximum Per Zone Per Day

Map Zone	Mon	Tue	Wed	Thur	Fri	Sat	Sun
SVCA	1	1	1	1	1	1	0
SVCB	2	2	2	99	0	0	0

On Monday, for SVCA, we have limed the *First Call* to 1.

On Thursday, for SVCB, we allow 99. This is the default when we converted to the new setting, essentially meaning it is unlimited.

On Saturday, for SVCB, we have zero. We do not allow any *First Calls* on Saturday for this map zone.

The dispatching units is set at 1 for this example, so every *First Call* will automatically take 1 units. This is will allow you to define a priority such as a compressor job that needs to take 3 or 4 units.

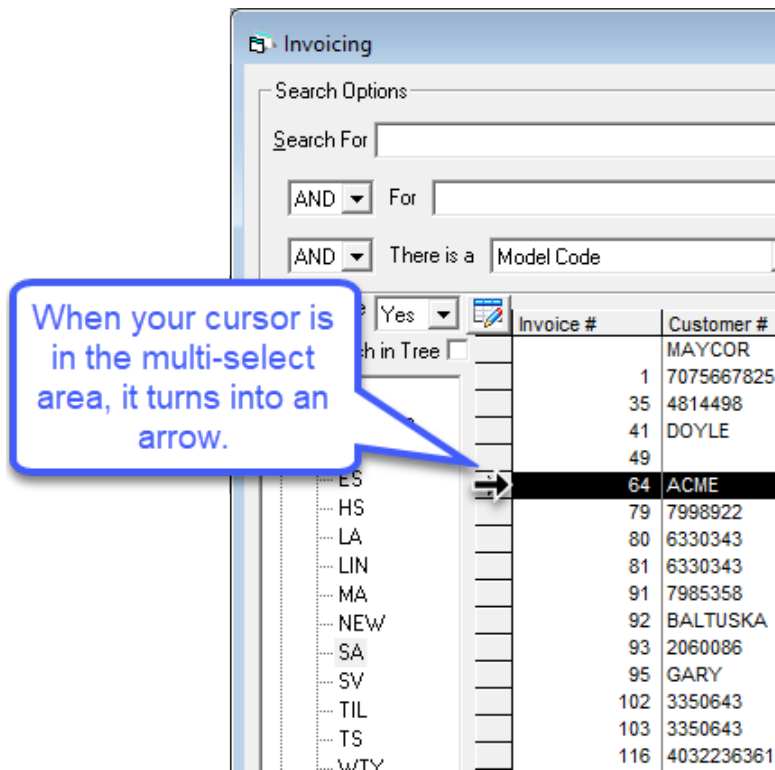
Editing the Dispatch Details of Multiple Invoices

Overview

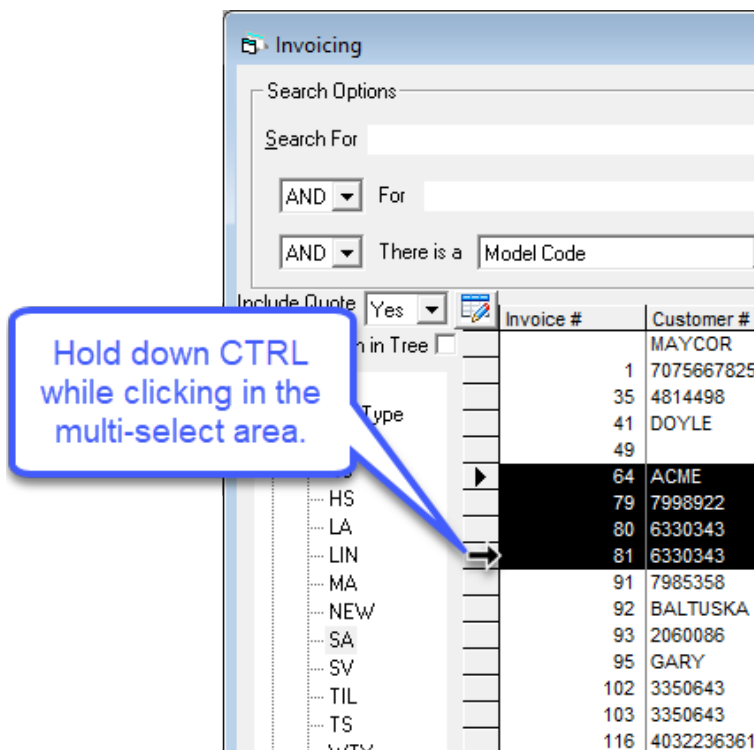
By using the Multi-Edit Field feature, you can edit the dispatch details of multiple invoices at the same time. Information that you can update include dates, Job Status, Notepad entries, Special Requests, and Ship To details.

To Edit Multiple Invoices:

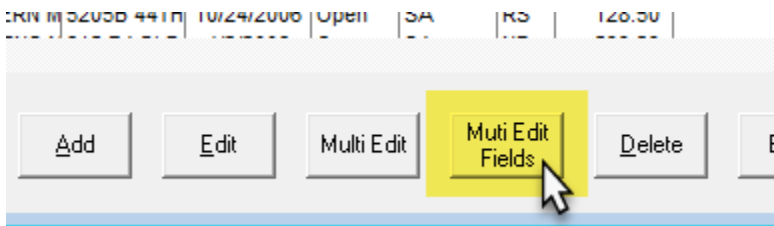
1. Open **Invoicing Maintenance**. (Go to **Invoicing > Maintenance**.)
2. Search for the invoices that need updating.
3. In the search results area, multi-select the invoices:
 - Select the first invoice by clicking in the multi-select area.



- Hold down CTRL and select additional invoices by clicking in the multi-select area.

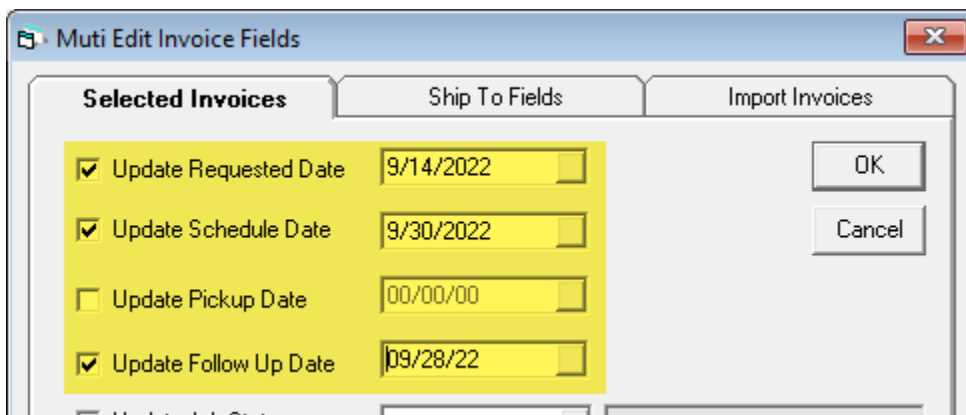


- Click **Multi-Edit Fields**.



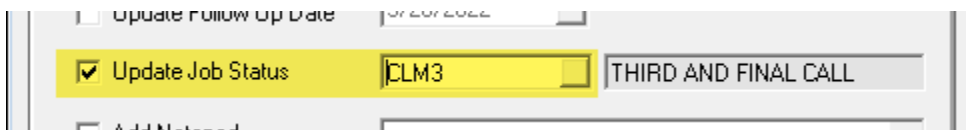
Update Dates:

- You can update the **Requested**, **Schedule**, **Pickup** and **Follow Up** dates. Click the checkboxes of the dates you want to update and enter the new date in the dropdown.



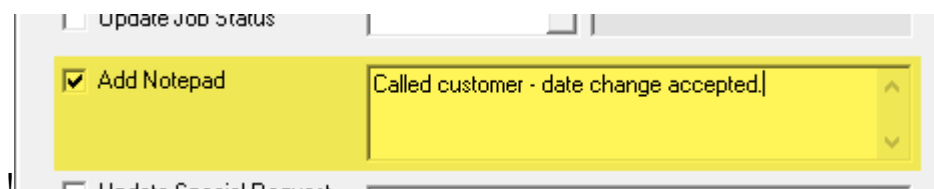
Update Job Status:

- To update the **Job Status**, click the checkbox and select a new status from the dropdown.



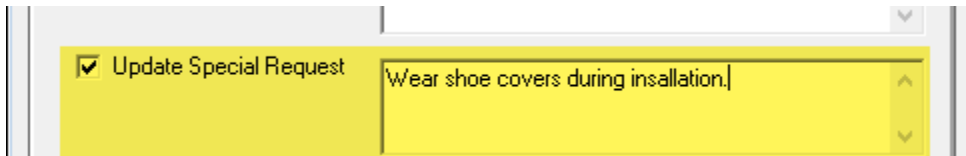
Add a Notepad Entry

- Click the **Add Notepad** checkbox and enter the note text. The text is added as a new entry in the Invoice **Notepad**.



Update Special Request:

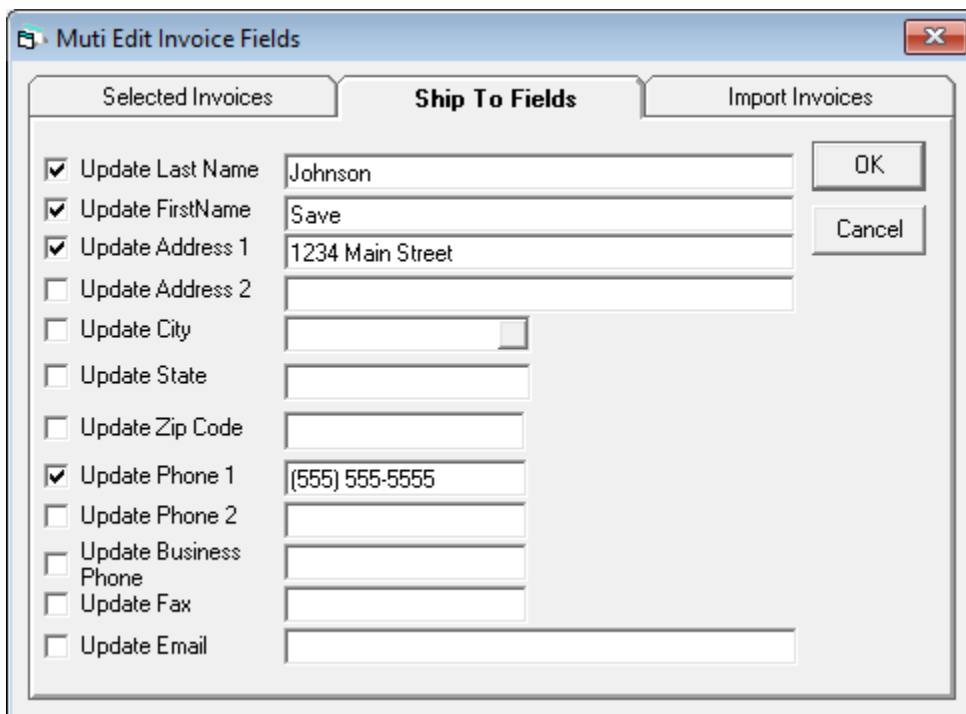
- Click the **Update Special Request** checkbox and enter the request text. This replaces the **Special Request** on the Primary Call. It doesn't replace past dispatches.



A screenshot of a software interface showing a yellow highlighted section. On the left, there is a checkbox labeled 'Update Special Request' which is checked. To the right of the checkbox is a text input field containing the text 'Wear shoe covers during insallation.'.

Update Ship To Details:

- Click the **Ship To Fields** tab.
- Select the checkboxes of the shipping fields that you want to update, and then enter the new information in the corresponding text boxes.



A screenshot of a dialog box titled 'Muti Edit Invoice Fields'. It has three tabs: 'Selected Invoices', 'Ship To Fields' (which is active), and 'Import Invoices'. The 'Ship To Fields' tab contains a list of checkboxes and corresponding text input fields. The checkboxes are: 'Update Last Name' (checked), 'Update FirstName' (checked), 'Update Address 1' (checked), 'Update Address 2' (unchecked), 'Update City' (unchecked), 'Update State' (unchecked), 'Update Zip Code' (unchecked), 'Update Phone 1' (checked), 'Update Phone 2' (unchecked), 'Update Business Phone' (unchecked), 'Update Fax' (unchecked), and 'Update Email' (unchecked). The text input fields contain: 'Johnson', 'Save', '1234 Main Street', an empty field, an empty field, an empty field, an empty field, '(555) 555-5555', an empty field, an empty field, an empty field, and an empty field. There are 'OK' and 'Cancel' buttons on the right side of the dialog.

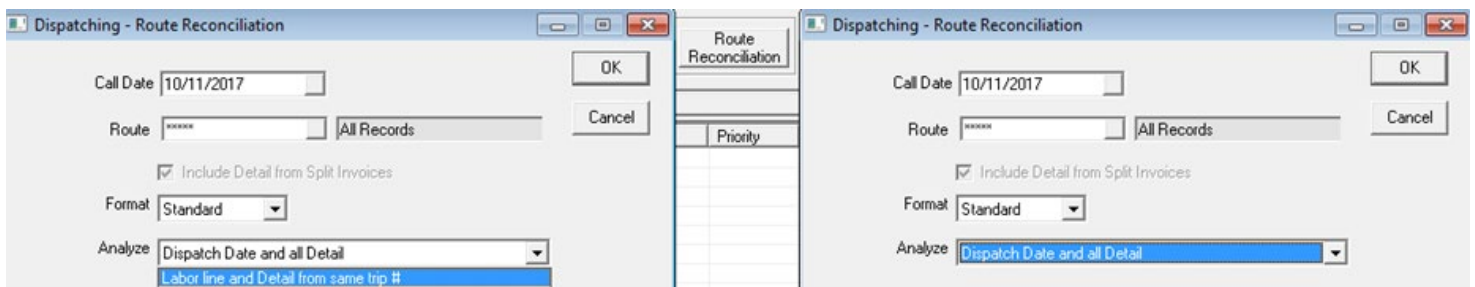


- If you change the City, the Tax2 Code and Tax2 Percentage might change as well. EPASS will automatically update the State and ZipCode based on settings in the City table.
- If you change Address1, City, and State, Google Address Validation may notify you to re-validate the address.

Route Reconciliation

Route Reconciliation, on the Routing screen, is used primarily by service companies to make sure all the information for a day's service calls was entered correctly.

It works well if you are using Mobile Technician or hand keying in the service orders after the technicians return.



Date Activity Entered and Using OR Call Date: The date selection changes based on the 'Analyze' option at the bottom of the screen.

When using *Labor Line and Detail from same trip #*, it is either based on date created or service date. Date created will select lines based on the actual date the line was keyed into the invoice whereas service date is better to use when you are processing technician's paperwork that they have brought in possibly a couple days late.

When using *Dispatch Date and Detail*, it will show all lines added to the invoice for that same schedule date.

Include Detail from Split Invoices: If you commonly split warranty invoices into two to separate the COD portion from the warranty portion, you will want to use this option.

Format: You can select either *Standard* or *Check-in*. The different formats follow the same rules based on the other fields above, but they are laid out differently and the *Check-in* format also includes the restocking and overstock details for each technician.

In the print outs below, you will see all the lines that were added to the invoices. This way you can review either what the technician entered or what the CSR entered for the technician to make sure nothing was missed.

Standard Format

This is a sample of the *Standard* route reconciliation format.

Appliance Company

DS-02

Route Reconciliation Report

Date Created: Oct 2, 2017

Technician : All

Report Date: Oct 8, 2017

System Date: Oct 8, 2017

System Time: 12:21:31 pm

Page: 1

Invoice #	Inv Type	Status	Brand	Model	Bill to / Sold to Customer		Total
	Payment Type			Serial			
	Job Status			Date Purchased			
Type	Job Statu	Svc Date	Time In/Out	Item	Description	Location	Cost Qty Ext. Price
SV1							
5211	HS	Open	WHL	ABC			179.99
	COD			12345	4017274240	CHAPUT, TIM	
	RESEARCH				4017274240	CHAPUT, TIM	
Warranty				123H03	COOKTOP: ELEC/GAS (1 179.99
5291	HS	Open					0.00
	COD				7742537292	LUPERON, FREDDY	
	RESEARCH				7742537292	LUPERON, FREDDY	
							0 0.00
SV2							
5238	SA	Open	WHL	FRGEW1243AAW			73.45
	COD				8608892093	BURZYCKI, JESSICA	
	SCHED			Mar 10, 2010	8608892093	BURZYCKI, JESSICA	
Labor		10/8/17		NF	Nick F.		0.00 65.00
Payment				CH	9812		0 73.45
5289	HS	Open	GE	TBX18JAAW			80.74
	COD				2223147	FRASER, MR JOHN	
	RESEARCH			Jul 15, 2013	2223147	FRASER, MR JOHN	
Labor		10/8/17		NF	Nick F.		0.45 50.00
Item			L1	WR9X208	COLD CONTROL	Main	16.00 1 27.20
Payment				M	1122		0 80.74
5290	HS	Open	JA	JEDS3412SSQ			150.00
	COD				7813356435	TOMA, GEORGE	
	RESEARCH			Jul 12, 2013	7813356435	TOMA, GEORGE	
Labor		10/8/17		NF	Nick F.		0.00 150.00
Payment				C			0 150.00

Current Items :	\$	27.20
Current Labor :	\$	265.00
Current Misc :	\$	0.00
Current Warranty :	\$	179.99
Current Payment :	\$	304.19
Total Invoices :	\$	484.18

Check-in Format

This is a sample of the *Check-in* route reconciliation format:

Date Created:	Oct 6, 2017	Technician:	All	System Time:	2:40:04 pm	Page:	1
Report Date:	Oct 11, 2017	System Date:	Oct 11, 2017				
SV1							
5436						RESEARCH	0.00
HS						Open	
7550255	DAVIS, ANN MARIE	Labor:	0.00			10/06/2017	
	Model: gal2213	Parts:	0.00				
	Serial: 11	Misc:	0.00				
		Tax:	0.00				
		Total:	0.00				
		Payment Total:	0.00				
		Balance:	0.00				
		Service Tech Commission:	0.00				
<hr/>							
5437						PI	174.30
HS						Open	
4165008001	YACCOV, NOAH	Labor:	0.00			10/06/2017	
	Model: JT12345	Parts:	110.00				
	Serial:	Misc:	50.00				
	Date of Purchase: Jan 1, 2017	Tax:	14.30				
		Total:	174.30				
		Payment Total:	0.00				
		Balance:	174.30				
		Service Tech Commission:	-130.00				

It includes a truck restocking report for each location:

Truck Restock		Location Code:	T1			
Code	Description	Unit	Main Old	Main New	Qty	
341241	DRYER BELT DRUM DR.(2)	EA	20	18	2	
42005	CALK COMPOUND	EA	3	1	2	
4201260	Cold Control		-5	-6	1	
DAC A300	CLEANER, CERAN 10 OZ.		0	-5	5	
DM608-9.5	TEST		1	0	1	

It also includes an overstock report for each location:

Location Overstock		Location Code:	T1			
Code	Description	Bin	QOH	Min	Max	
0016319	0016320		1	0	0	
0016320	0016319	AA-15	10	0	0	
0042137	BAKE ELEMENT		2	0	0	
0063158	THERMOSTAT		1	0	0	
0073115	60275		1	0	0	

Exporting Dispatch Data

You can export your dispatch data for import into several third-party platforms, including Package.AI and DispatchTrack.

Set Up

To Export your Dispatch Data:

1. Select **Invoicing > Dispatching > Data Export**.

The screenshot shows the 'Exporting Dispatching Data' dialog box. It contains the following fields and options:

- A**: Date From (2/1/2022) and To (2/28/2022) date pickers.
- B**: Format dropdown menu set to 'Package.AI - with Detail'.
- C**: Department dropdown menu set to 'DELIVERY'.
- D**: Check box labeled 'Export ePASS Route to Package.AI' which is checked.
- E**: Branch dropdown menu set to '01' and Job Status dropdown menu set to 'FIRM'.
- F**: File Name text box containing 'C:\MyDocuments\PackageAIDetail.csv'.

Buttons for 'OK' and 'Cancel' are located on the right side of the dialog.

2. Do the following:

- A. Enter the date range.
- B. Select the platform that you want to import the data into.
- C. Select the **Department** you want included in the export.
- D. Select this checkbox if you want to export your EPASS Route to Package.AI.
- E. Select the **Branch**, **Job Status** and **MapZone** you want included in the export.

F. Enter a path and filename for the export file. **Note:** The file path must already exist or the export won't complete.

3. Click **OK**.

EPASS creates the export file.

Example

BD	BI	BK	BL	BM	BN
Branch	ProductDescription	Service Brand Code	Service Product Code	Service Model Code	Service Serial Code
1138	GAS RANGES	ABC	1101	THX	113
1138	TOP LOAD WASHERS	XYZ	1102	FLT	124
1138	WASHER AND DRYER ACCESSORIES	RTC	1103	SKY	113
1138	ELECTRIC POWERED DRYERS	EPD	1104	TRL	125
1138	FRENCH DOOR FRIDGES	FDF	1105	RIM	116

Data Fields Included in the Export

Order Number	Bill Name	Bill Address1	Bill Address2
Bill City	Bill State	Bill Zip	Phone1
Model	Description	Quantity	Delivery Date
Delivery Type	Customer Code	Ship Name	Ship Address1
Ship Address2	Ship City	Ship State	Ship Zip
Phone2	Phone3	Email	Deliver Quantity

Amount	Delivery Charges	Taxes	Service Time
Cube	Truck	Account	Request Start Time
Request End Time	Order Detail	Number	Comment1
Comment2	Comment3	Latitude	Longitude
Unload Time	Balance	Map Zone	Priorities
Installation Estimate	Points	Scheduled Window Start Time	Job Status
Location	Directions	Qualifications	LaborRateCode
Serial#	Salesperson	Branch	ProductDescription
Service Brand Code	Service Product Code	Service Model Code	Service Serial Code
Service Date Purchased	Service Performed Description	SalesPersonEmail	ProductCode
Color	Serial PO	Sales Referral Code	PO Number

Reference			



The data exported is dependant on the export format. Some of the data fields listed here may not appear in every export format.

Batch Email and Text

EPASS supports batch texting and emailing. You can set up templates including pictures of the staff in either texts or email and receiving back text messages from customers.

Texting is done through a logical text number, not a physical cell phone. You may decide to have one text number per department of your company; I.E. one for deliveries and one for service. The benefit with separating the departments is the text responses from customers will go to the correct side of the company.

Texting also allows your delivery and service crews to send pictures back to EPASS which will be automatically attached to the documents tab of the invoice.

Formats

There are two tables in System Maintenance for setting up email formats and text formats.

The image shows two side-by-side screenshots of the EPASS software interface for configuring text and email formats.

Text Format Window (Left):

- Code:** DELIVERY TIME
- Description:** Delivery Confirmation
- Send To:** Sold To (dropdown menu)
- Message:** (SoldToFirstName) (SoldToLastName) - just a friendly reminder that XYZ Appliance Company will be delivering your product today between (DispatchTime) and (DispatchTime+3 hours).
- Include Route Picture:** ☐
- Attachment:** 0 / 10 (0.0 / 5.0 MB)
- Buttons:** Preview before sending, OK

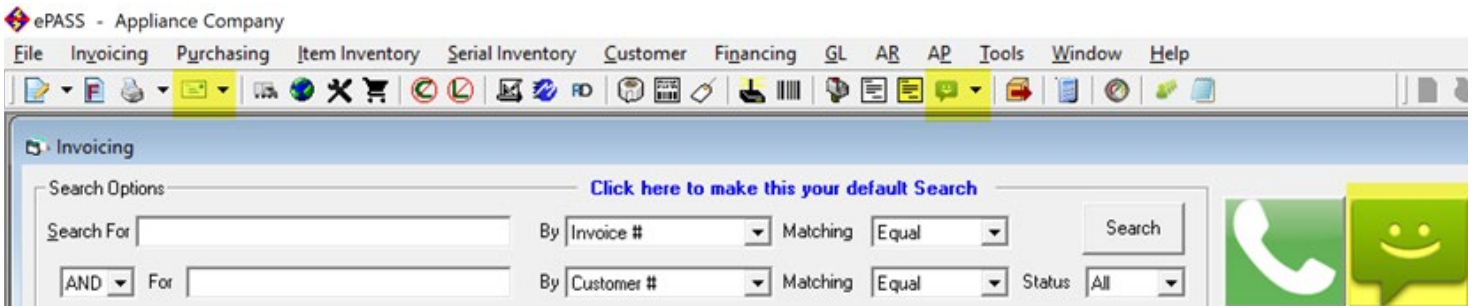
Email Format Window (Right):

- Code:** PARTSIN
- Subject:** PARTS ARE IN TO RESCHEDULE
- Include Invoice# in subject:** ☒
- Sender Name:** Parts Department
- Sender Email:** nfaola@rdbusiness.com
- CCEmail:** nfaola@rdbusiness.com
- Attachment:** (empty field)
- Message:** Dear: (SoldToFirstName) (SoldToLastName).
The parts for your (SvcModel) have arrived and we would like to reschedule you service your earliest convenience.
Please call xxxxxx so we can reschule.
- Buttons:** Add, Delete

Both formats allow you to setup standardized messages. In the two examples shown above, you will notice special fields such as the customer's name and schedule date are inserted. These formats can include many properties including the picture of the driver, the picture of the route or various attachments such as coupons, or a link to a survey etc.

When you are in invoicing and have an invoice selected you can have both the email formats and text formats available to quickly send a message to a customer. This could be as simple as a thank you for coming in, or maybe a message to let them know all their products have arrived and we can now reschedule them.

The routing screen also allows texting or emailing so, as the day is being put together or if technicians call in after they complete their last stop, they can have you send an 'on the way' message.



Terminal Settings

In Terminal Settings, there are two tabs controlling what email or text formats you have access to, along with your default email format.

Edit Terminal for Branch Default, Appliance Company

Terminal Printers Print Forms **Email Forms** Text Forms

Code	Description
PRODUCT IN	PRODUCT HAS ARRIVED
THANK YOU	THANK YOU EMAIL
WEB ORDER	WEB ORDER

OK Cancel

Review Add Edit Delete Duplicate

Default Invoice Form

Edit Terminal for Branch Default, Appliance Company

Terminal Printers Print Forms Email Forms **Text Forms**

Text Format

Code	Description
<input checked="" type="checkbox"/> DELIVERY TIME	Delivery Confirmation
<input checked="" type="checkbox"/> THANK YOU	THANK YOU FOR YOUR BUSINESS

OK Cancel

User Security

In the User Security table, you define a user's default text number along with which text numbers they have access to use. Remember, you might have more than one text number to separate sales from service or different branches. In a multi-branch company, it would too challenging for staff to receive text messages from customers in other branches or receive service text messages on the sales side of the business. Staff simply would not know what the message was in relation to.

The screenshot displays three overlapping windows in the EPASS software interface:

- User Window:** A table listing various user groups. The 'XYZ' user is highlighted.

ID	Name	Type	Group
CFD	CFD	Group	
CUSVC	CUSTOMER SERVICE	Group	
OWNER	OWNER	Group	
PARTS	SERVICE & INVENTORY	Group	
SALES	SALES STAFF	Group	
SRMAN	SENIOR MANAGERS	Group	
TOPMG	TOP MANAGEMENT	Group	
WHSOR	WAREHOUSE/ORDERING	Group	
XYZ	epass	User	
- Review User XYZ epass Window:** A form for configuring user details.
 - ID: XYZ
 - Name: epass
 - Password: [masked]
 - Re-enter Password: [masked]
 - Type: User
 - Group belonging to: [empty]
 - Save Defaults: ☒
 - Export Location: [empty]
 - Salesperson: [empty]
 - Technician: NF
 - Expeditor: [empty]
 - Route: SV1
 - My Parts Help: User Name [empty], Password [empty]
 - Thinking Phone: User Name [empty], Password [empty]
 - Text Messaging: Default Text Number 7786545621
- Security for User: epass Window:** A window for selecting security options.
 - Security Option: ☒ R&D Test Phone
 - Buttons: OK, Cancel, Select All, Power User, Add Security

Job Status (Auto Email)

In the Job Status table, you can setup automated emails. As an invoice job status is changed to 'Parts In', EPASS can send the customer an email letting them know to call in and reschedule.

The screenshot shows the 'Edit JobStatus PI PARTS IN' window with the following details:

- Code:** PI
- Description:** PARTS IN
- Options:**
 - ☐ Update Invoice Header
 - ☐ Cancelled
 - ☒ Show in ePASS Mobile Tech
 - ☐ Update Invoice Header from Mobile Tech
 - ☒ Show on Distributor Site
 - ☒ Show on Dealer Site
 - ☐ Obsolete
 - ☐ Do Not Dispatch
 - ☐ Require Minimum Deposit
 - ☐ Immediate Ship
 - ☒ Include in {Open Parts List} Special Field
- Auto Email Section (highlighted in yellow):**
 - ☒ Auto Email
 - Email Format: PARTSIN
 - ☐ Use Invoice Type Email Format
 - Attach Invoice: ☒
 - Email To: SoldTo

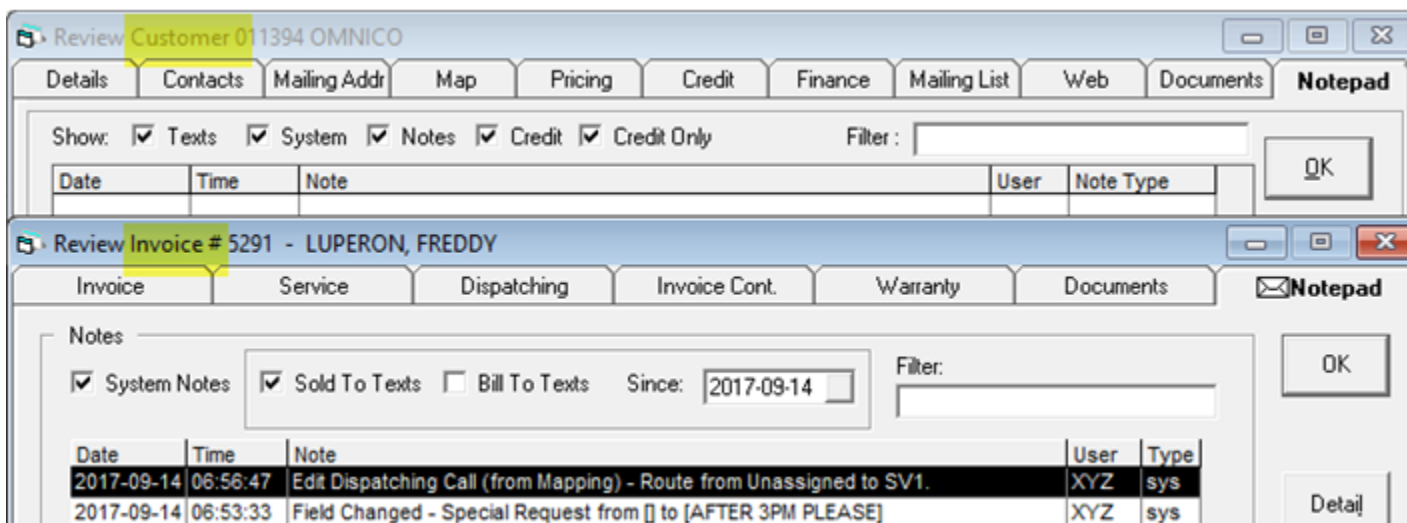
There is also an option to use the email format associated with the invoice type. You may have one message for your COD customers and a different one for your charge or warranty customers. In this case, the email format is

related to the 'Parts In' job status but, if this was related to a completed job status, you might send your retail customers one email and your builder customers something completely different.

info

Programming is required to setup the Auto Email feature.

Notepad



In both the invoice notepad and the customer notepad, you have new features allowing you to filter what you see.

There are a series of checkboxes controlling what you will see. Some options, such as credit or credit only notes, are also security controlled. In the customer notepad, you have checkboxes for texts, system generated notes, regular notes, credit approval notes, and credit department only notes.

The invoice notepad allows you to control system notes and sold to or bill to text messages along with a date.

In both areas, you have a filter option which will allow you to search your notepad entries for the word(s) entered.

Customer Properties

Ship To

Last Name / Company: JONES

First Name: KEITH

Address 1: 4649 BEVERLY CRESCENT

Address 2:

City: VANCOUVER State: BC Zip Code: V6J 4E6

Home: (604) 263-0735

Cell: (604) 123-1234

Business Phone:

Fax:

Email: keith@rdbusiness.com

Invoice Delivery Method: Print

Directions: THIS STREET TO THAT STREET

Opt Out
Opt Out options are only updated when clicking Update Customer

☐ Do Not Mail
☐ Do Not Email
☐ Do Not Text
☐ Do Not MMS

Preferred Contacts

Way	Type	Value
Phone	Cell	(604) 123-1234
Text	Cell Text	(604) 123-1234
Phone	Home	(604) 263-0735

[Customer Phone Log](#)

Edit Customer 2630735 JONES

Details Contacts Mailing Addr Map **Pricing** Credit Finance Mail

P.O. Number: Expiry Date: 00/00/00

Branch: 1 Head Office Appliance Company

Use Project Pricing: ☐

Item List Price Code: L1 Retail

Serial List Price Code: L1 Retail

Other List Price Code: L1 Retail

Labor Rate: Rate 1 ☒ Show Invoices Hyperlink

Invoice Delivery Method: Print

Last Activity Date:

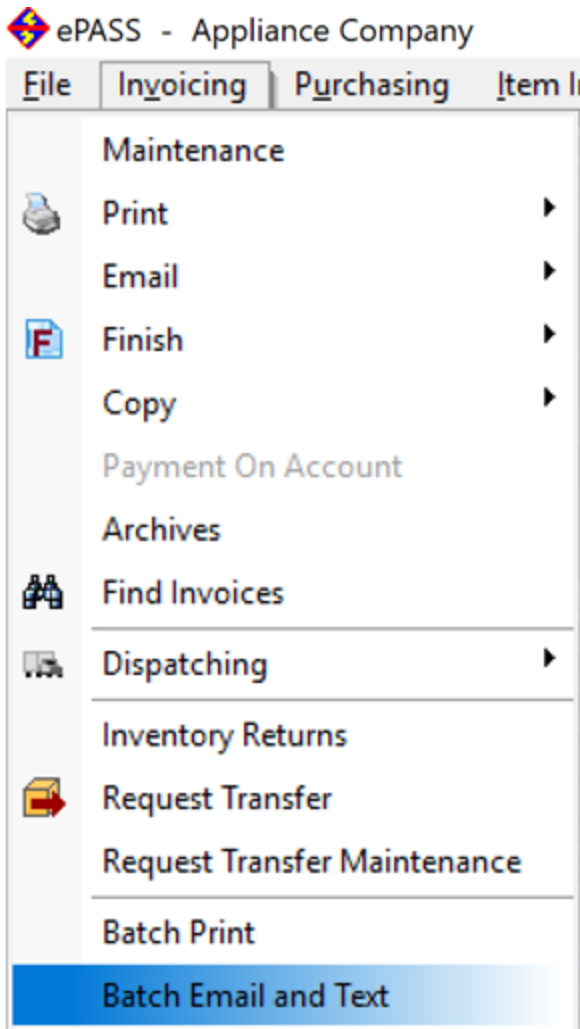
Created: Conv 2002-05-16

Modified: XYZ 2017-10-07

In both Customer Maintenance and in Invoicing you can setup how the customer wishes to be contacted. This is very important for batch texting, emailing, and printing to work properly.

In the example above the customer has a home number, cell number, and has agreed to be texted. He has also not chosen to opt out of any of the methods of communication. As per his preferred contacts list, we will attempt to call him on his cell phone first, text his cell phone and lastly call his home number.

Batch Emailing & Texting



Currently the Batch Email and Text procedure allows you to send both emails and text messages to all the customers scheduled for delivery for tomorrow, or send a thank you to everybody that was finished today.

The first screen is where you select the department, invoice status, date range etc. Once you click *next*, all the invoices will be selected and you will see a preview of what EPASS plans to send.

Batch Email / Text Invoices

Criteria for Invoice | Recipients and Send | Running Log

Step 1 - Select Criteria

Batch emailing has changed!
You still select all of your criteria on this screen, but when you click Next you'll get a preview of what will be emailed or texted before actually sending it.

Department:

Invoice Status:

Invoice Type: All Records

Payment Type: All Records

Map Zone: All Records

JobStatus: All Records

Route: All Records

Finished By: All Records

Use

☐ Finish Date

☐ Invoice Date

☒ Schedule Date ☐ Include Do Not Dispatch Invoices

☐ Pickup Date

From: To:

☐ Bill To Code

From: To:

☐ Reference

From: To:

☐ Include Estimate Invoices

Next

Batch Email / Text Invoices

1 Criteria for Invoice 2 Recipients and Send 3 Running Log

Step 2 - Select Recipients and Send ☐ Use Delivery Method to Determine Email Customers Invoices in List: 12 Refresh Invoice List

	Invoice #	Sold To	Preferred	Opt Out	Delivery	Sold To Email	Text Number	Route Email	Bill To	Preferred	Opt
1	5211	CHAPUT, TIM			PRINT				CHAPUT, TIM		
2	5238	BURZYCKI, JES...			PRINT				BURZYCKI, JES...		
3	5241	SKOLAS, JOHN			PRINT				SKOLAS, JOHN		
4	5263	JACKIE, JACKIE			PRINT				JACKIE, JACKIE		
5	5281	SMITH, KYLE			PRINT				SMITH, KYLE		
6	5283	JONES, KEITH	Text		PRINT	keith@rdbusiness.com	(604) 123-1234		ACTIVE PROPE...		
7	5284	SMITH, BERTHA			PRINT				SMITH, BERTHA		
8	5287	SMITH, KATHE...	Email,Text		PRINT	katherine@katherine.c...	(604) 230-3162		SMITH, KATHE...	Email,Text	
9	5288	GRALTON, KAS...	Text		PRINT				GRALTON, KAS...	Text	
10	5289	FRASER, MR J...			PRINT				FRASER, MR J...		
11	5290	TOMA, GEORGE	Email,Text		PRINT	gatoma@gwtoma.com	(781) 335-6435		TOMA, GEORGE	Email,Text	
12	5291	LUPERON, FRE...			PRINT	fluperon@newengland...			LUPERON, FRE...		

Email for 4 Invoice(s)

☒ To Sold-To Customer ☐ To Bill-To Customer ☐ To Sold-To and Bill-To Customers

☐ To Dispatching Route for All Invoices

☐ To THIS Email Address for All Invoices

Invoice Format: WILSON Email Format: CONFIRMATION ☐ Use Invoice Type Email Format

Attachments:

Text for 3 Invoice(s)

☒ To Invoice Customer using ☐ Sold-To ☐ Bill-To ☐ Sold-To and Bill-To

Text Format: DELIVERY TIME

Your Text Number: 7786545621

☐ Only Send One Email/Text per Customer

☐ Do Not Attach Invoice

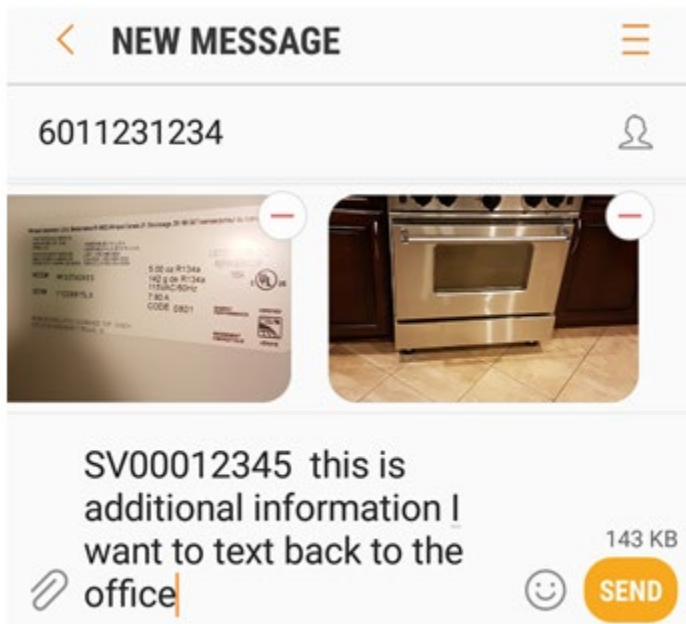
- Use Delivery Method to Determine Email Customers:** The customer print/email setting from the pricing tab of Customer Maintenance populates the delivery column on this screen. When this checkbox is checked, it will use the print/email option from this column. When this is unchecked, it will use the preferred column to determine how we contact the customer. The preferred column comes from the preferred contacts screen section from the Invoice Header shown previously.
- Refresh Invoice List:** You can correct invoices, customers and select to refresh this screen. Sometimes you have to fill in an email address or set the preferred contacts to allow texting etc.
- Email/Text indicator:** The red circle with a line through it means this invoice will not be emailed or texted. In the examples above, we do not have email addresses, text numbers, or the customers are set to 'print' for their delivery method. Some have an icon indicating they will be texted and emailed; the very last one is only being emailed.
- Email for # Invoices:** You can select if the email goes to the sold to or the bill to customer, or if all the invoices are being emailed to the technicians using *To Dispatching Route for all Invoices* or being sent to a specific email address. You can also select the invoice print format, the email format, and what attachments will be included. Keep in mind, the email format may already have defined attachments.

There is also an option to use the invoice type email format. This way each different invoice type will receive their own format.

5. **Text for # Invoices:** For the invoices being texted, you can select which customer the text goes to, which text format is used, what text number the messages are sent from, and an option to only send one message to each customer. In this case, even if they have both text and email selected, they will not be sent two messages. There is also an option to not attach the invoice.

Receiving Text Messages

Text messages may be coming in from customers or drivers sending in either text or pictures.

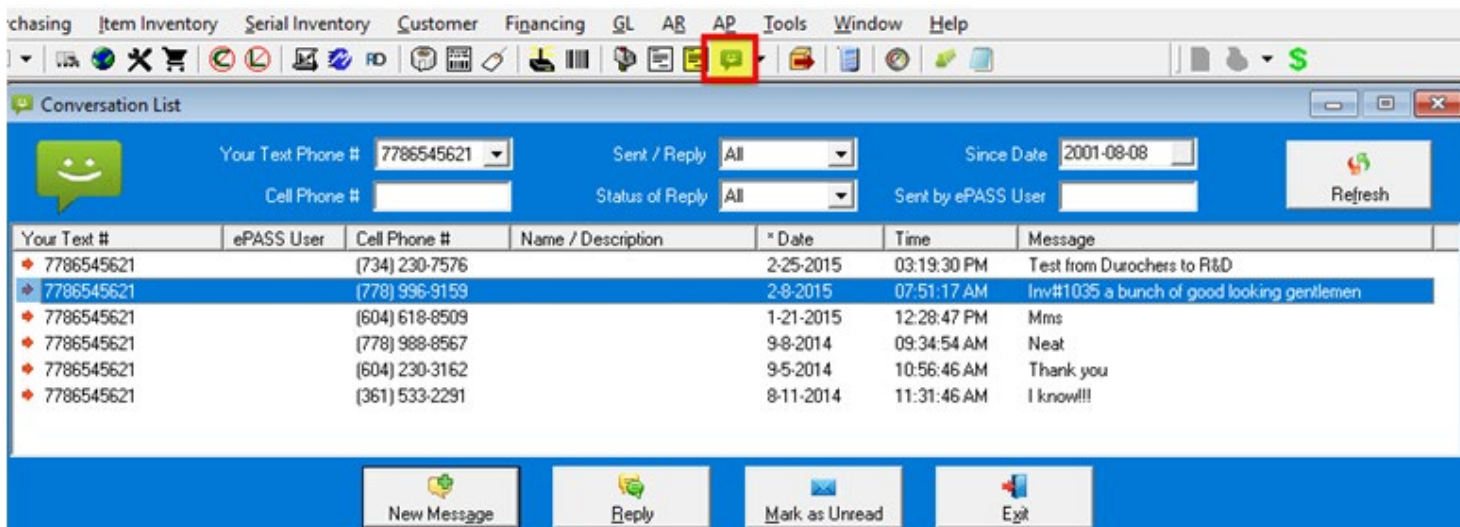


A driver who sends this message is attaching 2 images for invoice SV00012345. The additional verbiage 'this is the information I want to text back to the office' will be added to the notepad by EPASS.

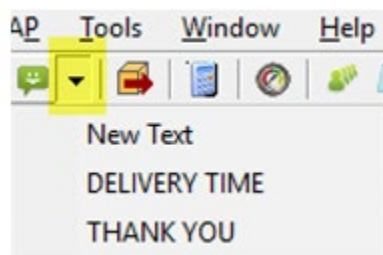
This allows the drivers to both send back images and notes all in the same text message and EPASS will automatically be able to attach these text messages for you.

If the invoice number cannot be validated by EPASS, then all users that have access to that text number receive a notification that there is an unresolved text message. They can then see the text message and drag/drop it to the correct location.

Text Message Inbox



When you click the text message icon, not the down arrow to the right of it, you will open the text message inbox. Here you will see all text messages for the customer you have selected or you can search messages, reply, mark as read and also send a new message.



If you had clicked the down arrow to the right of the text icon, you would have all your text formats available to select. This is a very quick way to send a text message if you already have a customer or invoice selected.

If you double click on any of the text messages, the complete conversation will open up, similar to how you are used to see text messages on your cell phone.

If EPASS was not able to validate the invoice number in this text message, you can drag/drop the attachments to the invoice they belong to. You do not need to drag them to a network share first or anything, you simply drag the attachments from the text message to the documents tab of the invoice.

Google Maps Integration

Start by setting up the address validation in Accounts Receivable variables:

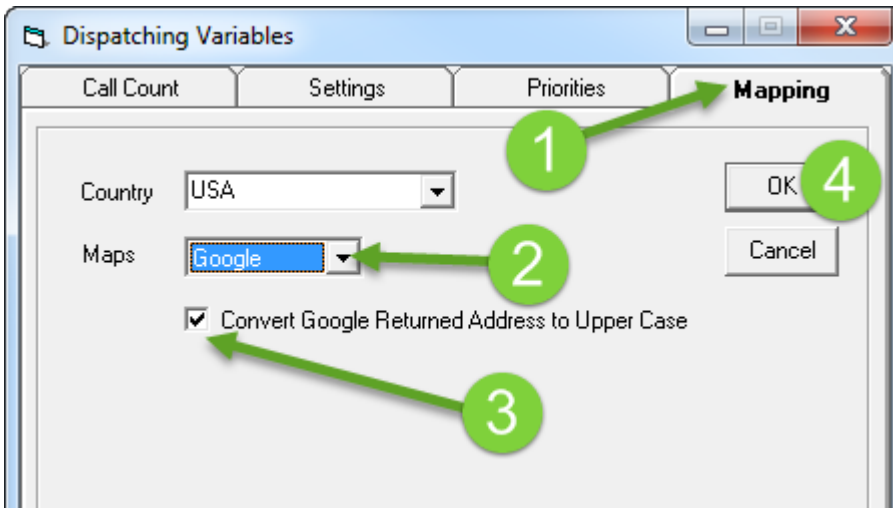
Tools > System Maintenance > Variables > Accounts Receivable

1. Click the **Customer 2** tab
2. In the **Validate Address With** field, set it to Google
3. Click **OK**.

We highly recommend that you make sure all branches are validated with Google.

Then, open Dispatching variables:

Tools > System Maintenance > Variables > Dispatching



1. Click the **Mapping** tab.
2. Set Maps to **Google**.
3. **OPTIONAL** - If you would like to store customer address information in upper case, this will convert the address that Google finds, to upper case.
4. Click **OK**.



Restart EPASS for the changes to take effect.

Before first use - validate addresses with Google

Run this utility **before** using EPASS with Google Maps integration for the first time.

This guide will help you validate customer addresses with *open invoices*.

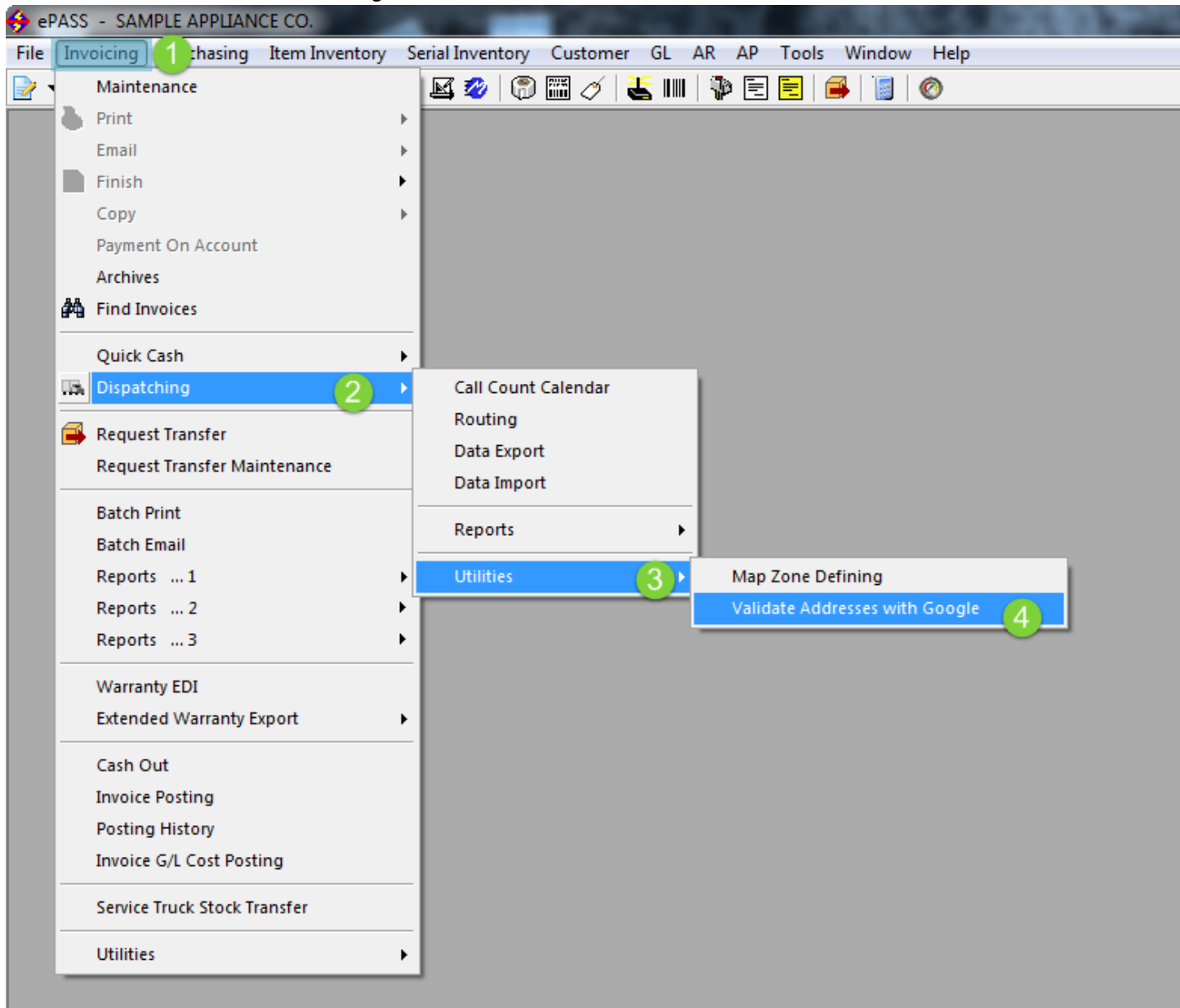
This utility helps to automatically validate as many addresses in advance as possible.

Mapping becomes faster if the address has been validated. Note that no addresses are ever changed by the utility, just validated.

Step 1: Find the "Validate Addresses with Google" button.

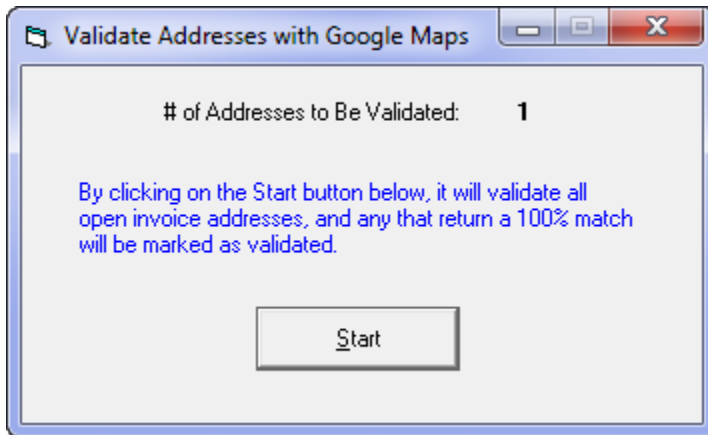
1. Click *Invoicing*.
2. Click *Dispatching*.

3. Click *Validate Addresses with Google*.

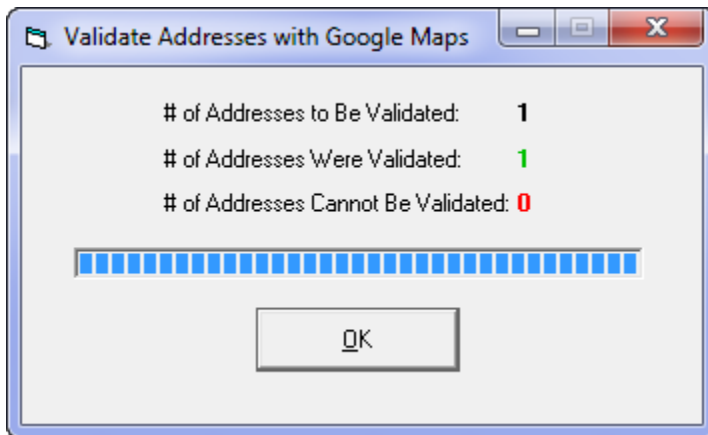


Step 2: EPASS will show "# of Addresses to be Validated"

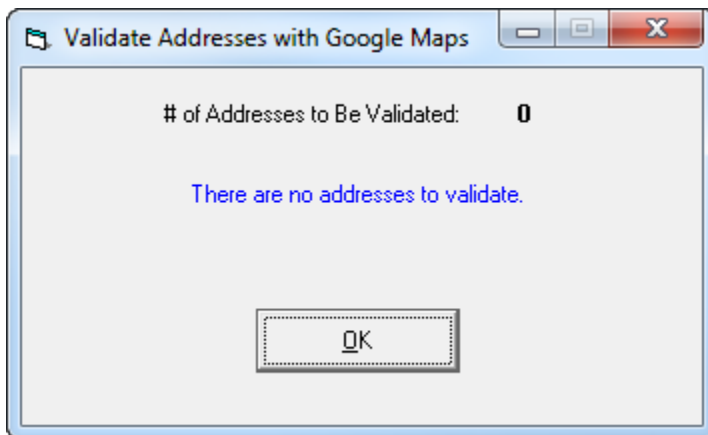
Before starting the utility, EPASS shows how many addresses need to be validated:



After running the utility, EPASS shows a progress update of validating the addresses:



If you have no addresses to validate, EPASS will show you this screen:



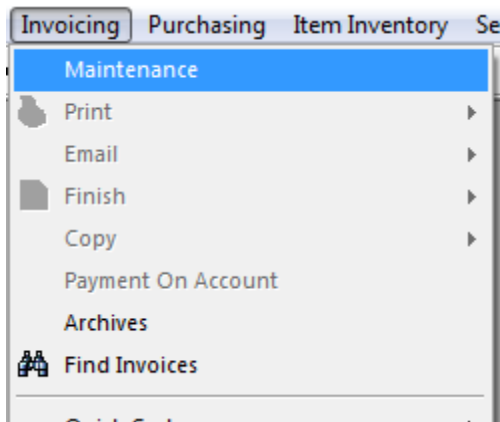
You have successfully run the utility to validate customer addresses with open invoices.

Invoicing Maintenance and Address Validation

This guide will help you add an invoice for an existing customer and validate their address with Google Maps. You will also be able to view the nearest service calls to a specific customer.

Step 1: Go to Invoicing Maintenance

1. Click *Invoicing*
2. Click *Maintenance*



Step 2: Add a new invoice for a customer

1. Click *Add*
2. For this example, we will click the button in the "Service At" field. Alternatively, you can also type in the customer's account number, if you know it

[illegible]


Add Invoice

Invoice | Service | Dispatching | Invoice Cont. | Warranty | Documents | Notepad

Invoice # Invoice Date Schedule Date Pick up Date

Invoice Type

Payment Type

Service At 

Job Status

PD Number

Reference

Bill To

☐ Financed

Salesperson 1

Salesperson 2 %

Sale Referral

Total Created

Status Modified

Posted Finished

OK Cancel Detail

Step 3: Search for, and select a customer

1. Enter some search criteria to find your customer
2. Click *Search*
3. Click on the customer's information that you would like to select
4. Click *Return*

Select Customer

Search Options: [Click here to make this your default Search](#)

Search For: (1) By: Last Name Matching: Start of Field (2)

AND For: By: Account # Matching: Equal

Account #	* Last Name	First Name	Address 1	Address 2	City	Bill-To Account	Branch
6127091376	SMITH	JASON	17000 66TH AVE N		MAPLE GROVE		Default
6127152505	SMITH	RICK	2212 OAKLAND RD		HOPKINS		Default
6127243064	SMITH	DIANE / LUC	4114 BLAISDELL AVE S		MINNEAPOLIS	CAPITAL	Default
6127307887	SMITH	CECIL	1818 14TH AVE S #11		MINNEAPOLIS		Default
6127419727	SMITH	CRAIG	5244 149TH ST		APPLE VALLEY		Default
6127707966	SMITH	LOGAN	10586 COLORADO AVE N		BROOKLYN		Default
6127993624	SMITH	DAVID	4411 THOMAS AVE S		MINNEAPOLIS		Default
6128034436	SMITH	CRAIG	11505 OLD ROCKFORD RD		PLYMOUTH		Default
6128042989	SMITH	DAVID & CLARA	2460 MORSON CIR		EAGAN		Default
6128228971	SMITH	AMY / JOE	4033 13TH AVE S		MINNEAPOLIS		Default
6128229551	SMITH	RUSSEL	4237 OAKLAND AVENUE		MINNEAPOLIS		Default
6128231818	SMITH	TODD & JILL	4600 EMERSON AVE S		MINNEAPOLIS		Default
6128506550	SMITH	BETH	6922 EDGEBROOK PLACE		EDEN PRAIRIE		Default
6128658566	SMITH	MICHELLE	1733 IRVING AVE S		MINNEAPOLIS		Default
6128671134	SMITH	AL	17075 GEORGETOWN WAY		ROSEMOUNT		Default
6128678998	SMITH	WILLIAM	1321 LA SALLE ST		WAYZATA		Default
6128710000	SMITH	FRANK	14251 22TH ST # 204		MINNEAPOLIS		Default

Return (4)

Record Count: 337

History Review Add Edit Delete Copy Excel Exit

Step 4: Unsolved Addresses

If the customer's address is unsolved, you will receive this notice. Click *OK* to validate the address with Google Maps

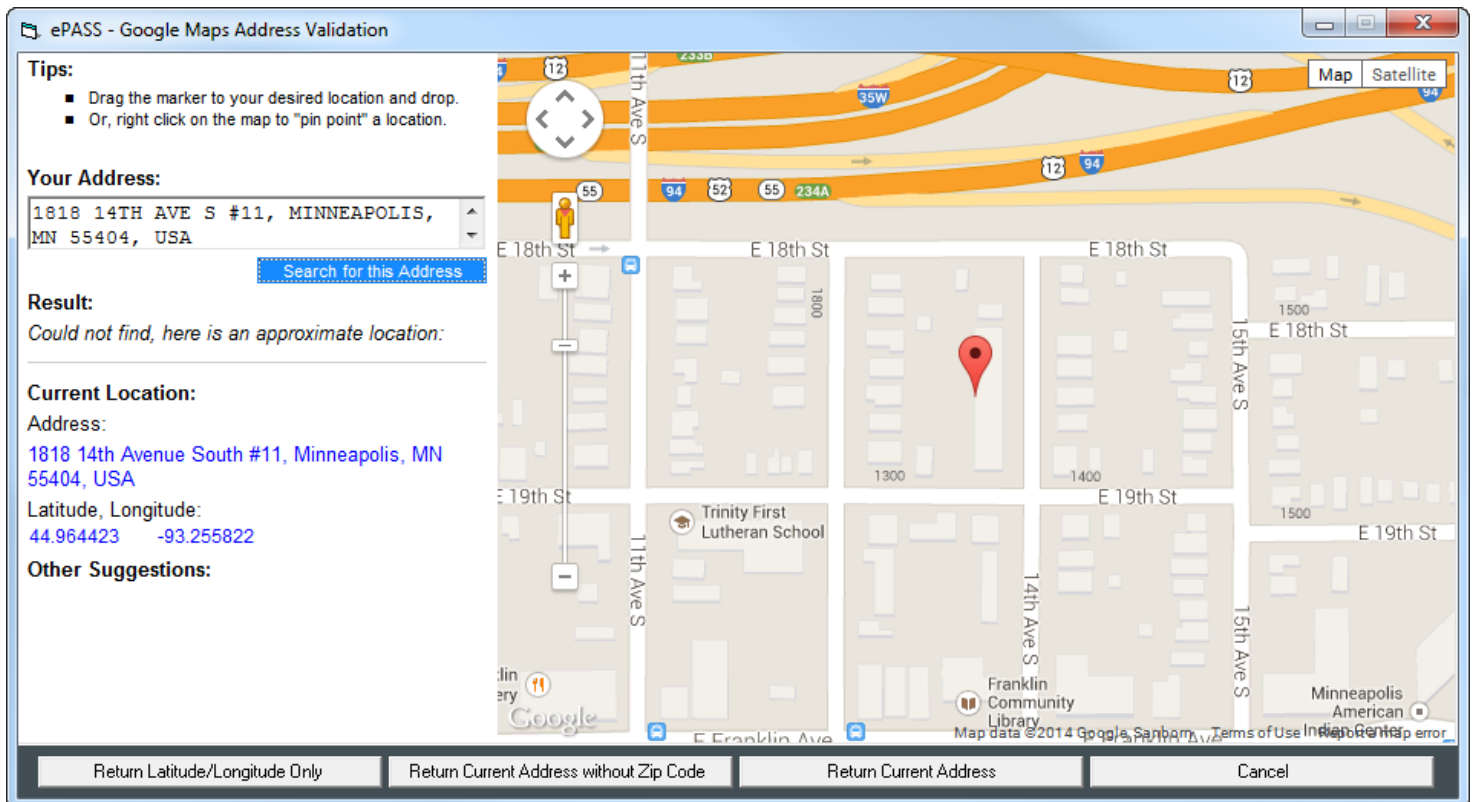
Address Validation

Customer address is unsolved. Click 'OK' to search Google Maps.

OK

Step 5: Validate the Address using Google Maps

If Google Maps does not recognize the address completely, it may ask you to validate the address by specifying where on the map the address is. This is the same process as validating an address when adding a new customer, through Customer Maintenance.



Fixing the Address:

You may drag the marker to anywhere on the map, or take suggestions from the left hand side of the screen. Alternatively, you may also want to edit the address in the "Your Address" field, and try searching for it again.

Once you are happy with your marker location, you can choose 1 of 4 options:

Return Latitude/Longitude Only:

- This option will keep the address that you have manually entered in the "Your Address" field. It will also save the latitude and longitude coordinates of the marker on the map.
- This option can be useful with addresses that do not exist yet on Google Maps, such as new building developments, new streets, etc.

Return Current Address Without Zip Code:

- This option is useful if you have a spelling mistake in the "Your Address" field, and would like to take Google Maps' suggested "Current Location" as your address, *without the zip code*.

Return Current Address:

- PLEASE NOTE: For Canadian addresses, there will be no option to return the current address with a Postal Code! Google Maps has too many inaccuracies when retrieving Postal Code information for Canadian addresses.
- This option is useful if you have a spelling mistake in the "Your Address" field, and would like to take Google Maps' suggested "Current Location" as your address, *with the Zip code*.

Cancel:

- Discards all changes, and returns back to the "Add Customer" screen.
- This customer will not be validated again, until you attempt to view their address information on any of the mapping screens in EPASS.

Step 6:

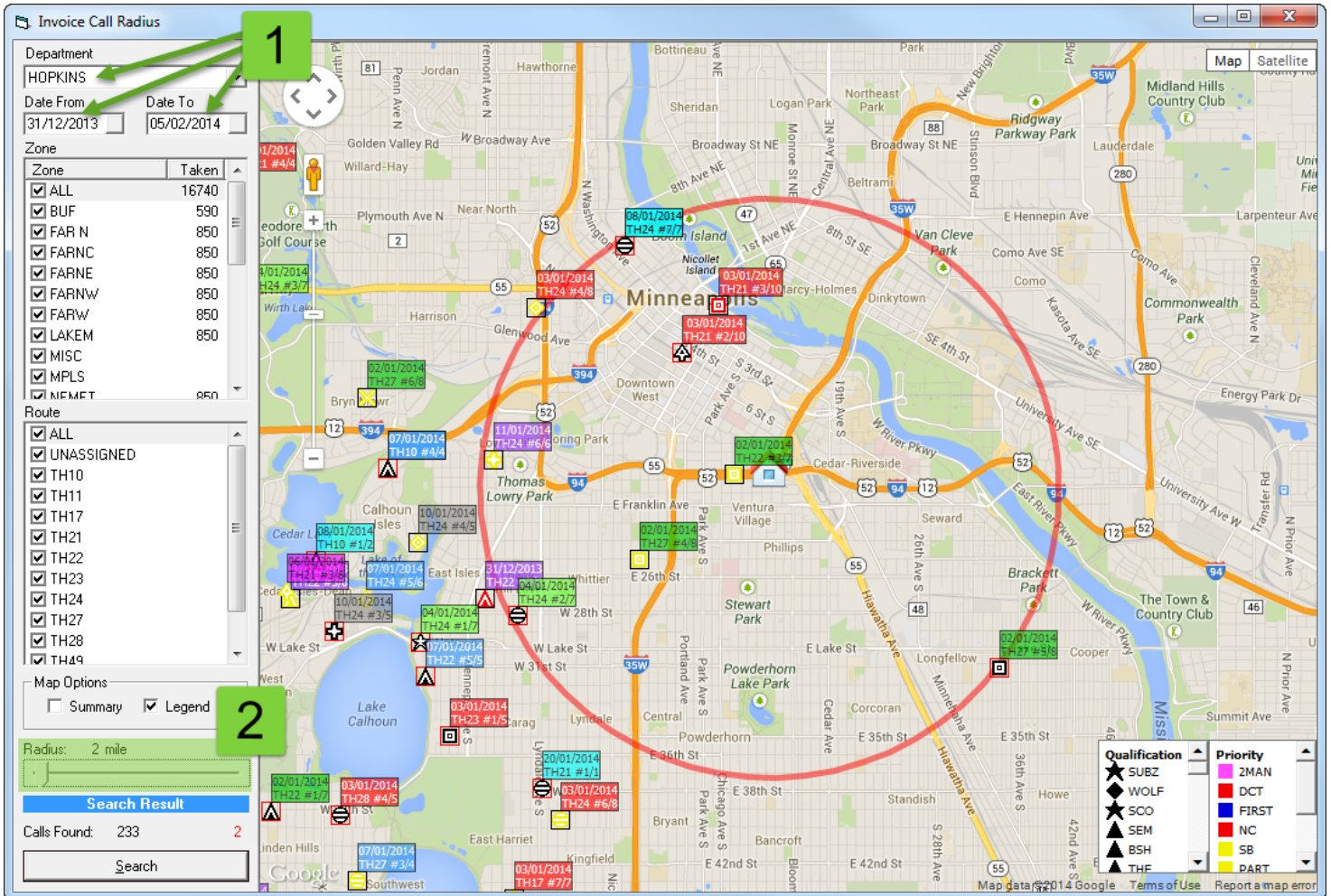
Click the Dispatching tab to see calls around this customer. If a call is in a rural area, and you would like to see which days your technicians/drivers will be close to the area, you can do this easily by clicking the *Map* button in the Dispatching tab.

This will allow you to easily schedule this service call on the same day that you technicians/drivers are close by.

1. Click the Dispatching tab
2. Click *Map*

Step 7: View nearby calls on the "Invoice Call Radius" screen

- Double check to make sure the department and date range are what you want.
- The default setting for the department is the same as the current invoice.
- The default setting for the date from to date to is one week.
- The default setting for zone and route is ALL.
- You can adjust any of the above settings when desired.
- Just click *Search* to refresh the map after making any adjustments.
- Adjust the radius of the red circle to see the closest service calls to your marker on the map. This will allow you to easily gauge how far away the other calls are.

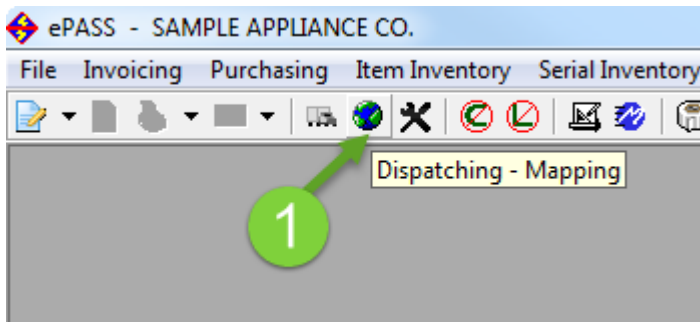


You have successfully added a new invoice for a customer and have seen the nearest service calls to a specific customer.

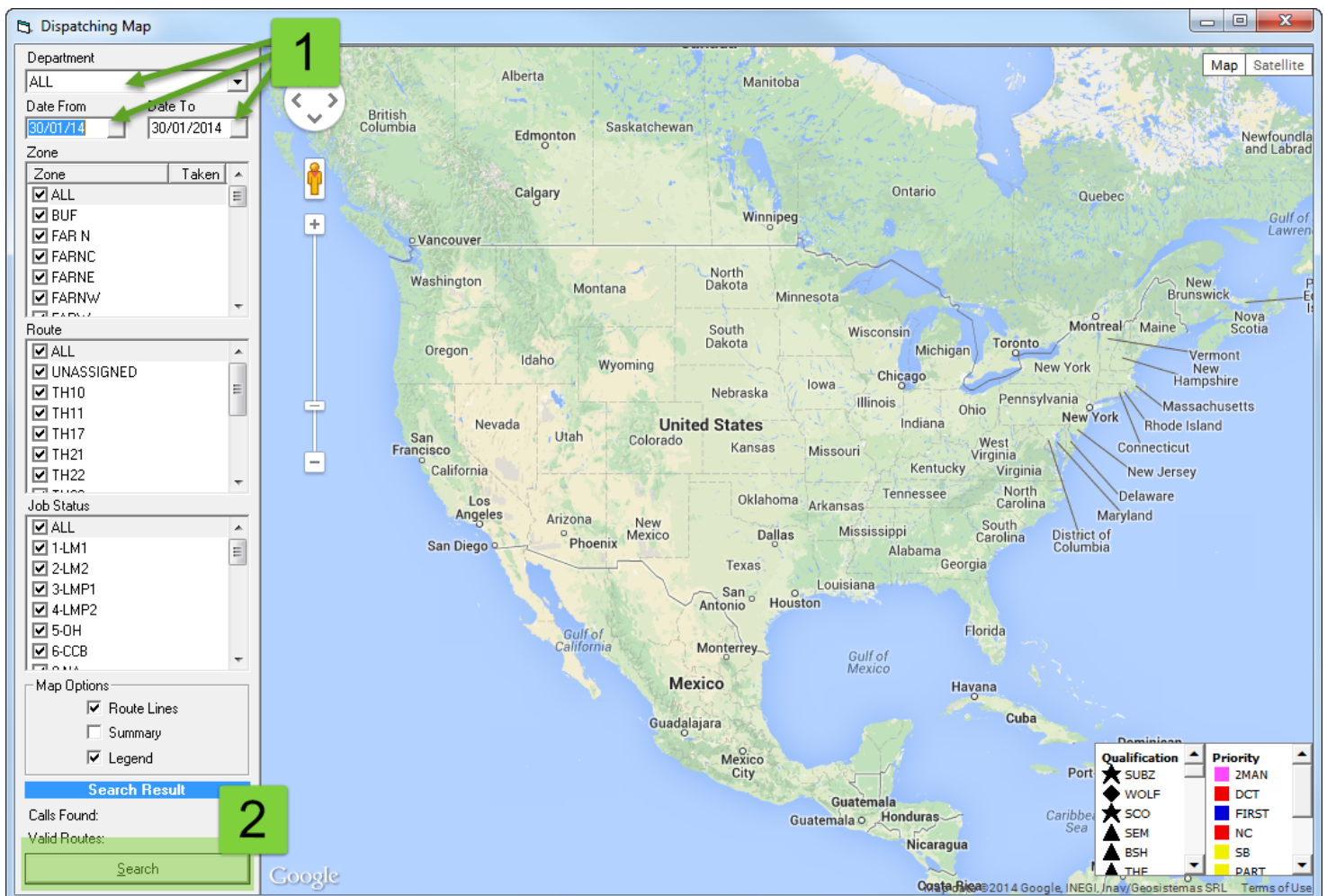
View Routes on an Interactive Map

You can view and edit all service calls and/or deliveries, on an interactive map of your area. You can view multiple routes and days simultaneously, which can help you cut down on drive time!

Click the Globe icon to see the "Dispatching Map" screen



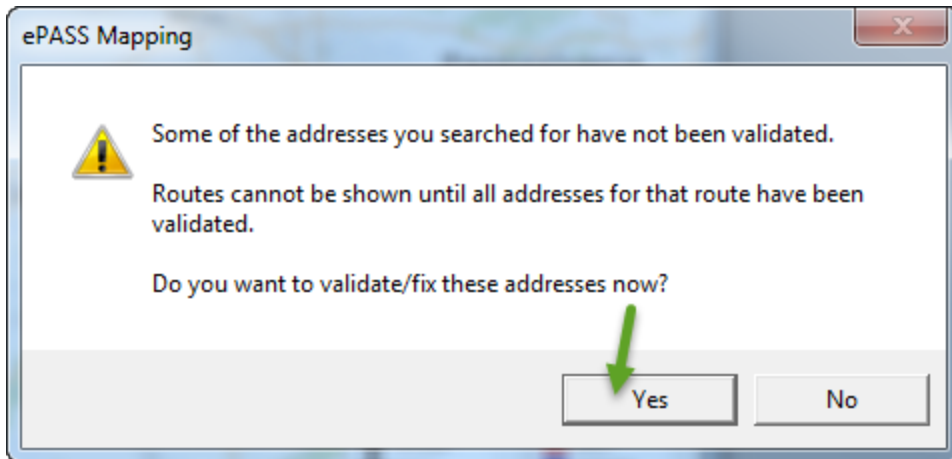
Choose your Department and Date Range, and then click "Search"



Validate any Unsolved Addresses

- You may encounter a pop-up that says "Some of the addresses you searched for have not been validated."

- These addresses do need to be validated if you want to see them appear on the map.
- Click Yes to validate these addresses.

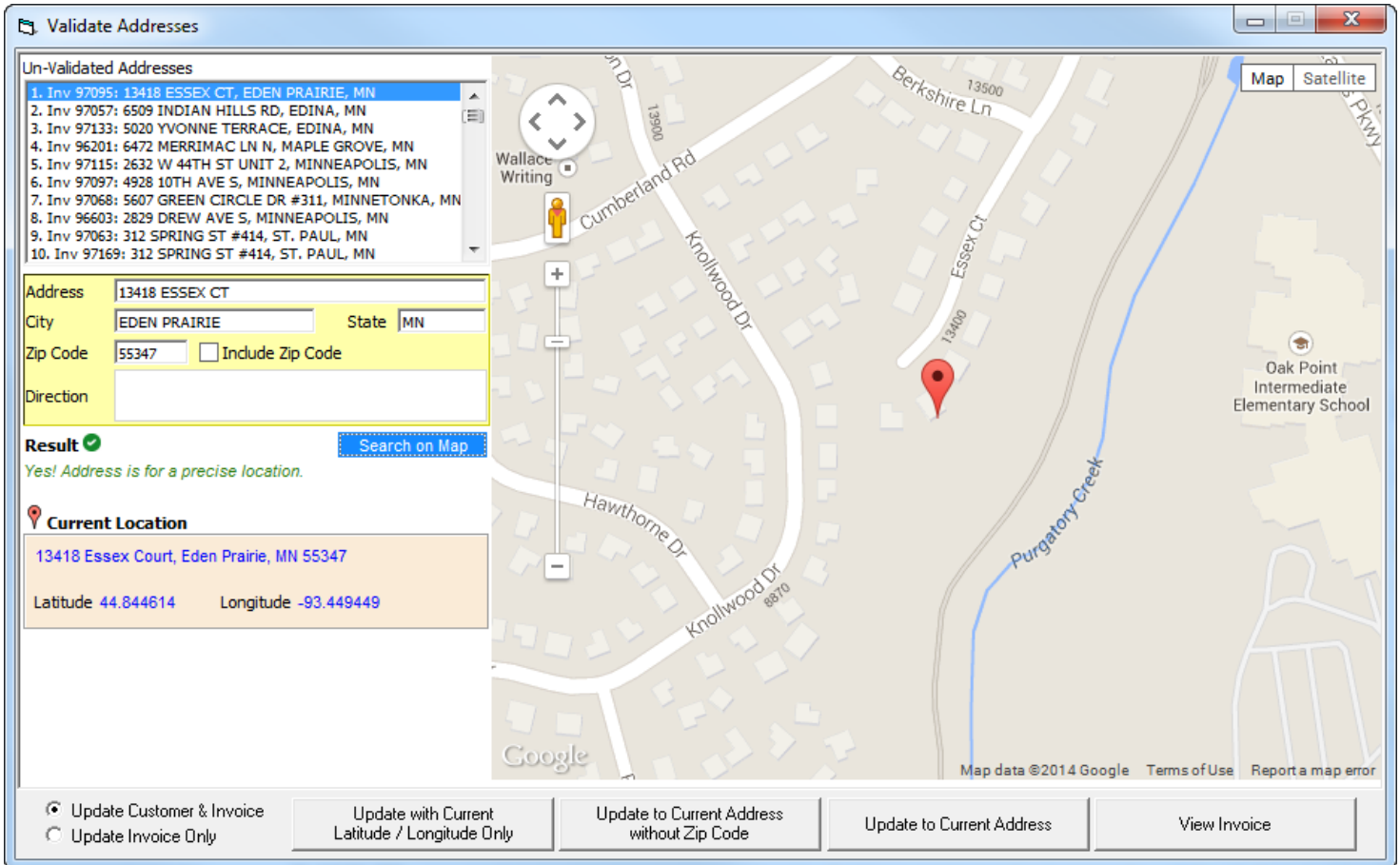


Validate the Address using Google Maps

If Google maps does not recognize the address completely, it may ask you to validate the address by specifying where on the map the address is.

The following screen capture shows the address validation screen.

- Addresses not validated will appear in the top-left corner of the screen.
- As the addresses are validated, it will automatically switch to the next one.
- When all addresses have been validated, it will automatically display the map.
- **VIEW INVOICE:** If you cannot figure out the address, click the *View Invoice* button to see the customer's contact information. You can always call them to verify the address.



Fixing the Address:

You may drag the marker to anywhere on the map, or take suggestions from the left hand side of the screen. Alternatively, you may also want to edit the address in the "Your Address" field, and try searching for it again.

Once you are happy with your marker location, you can choose 1 of 4 options:

Return Latitude/Longitude Only:

- This option will keep the address that you have manually entered in the "Your Address" field. It will also save the latitude and longitude coordinates of the marker on the map.
- This option can be useful with addresses that do not exist yet on Google Maps, such as new building developments, new streets, etc.

Return Current Address Without Zip Code:

- This option is useful if you have a spelling mistake in the "Your Address" field, and would like to take Google Maps' suggested "Current Location" as your address, *without the zip code*.

Return Current Address:

- PLEASE NOTE: For Canadian addresses, there will be no option to return the current address with a Postal Code! Google Maps has too many inaccuracies when retrieving Postal Code information for Canadian addresses.
- This option is useful if you have a spelling mistake in the "Your Address" field, and would like to take Google Maps' suggested "Current Location" as your address, *with the Zip code*.

Cancel:

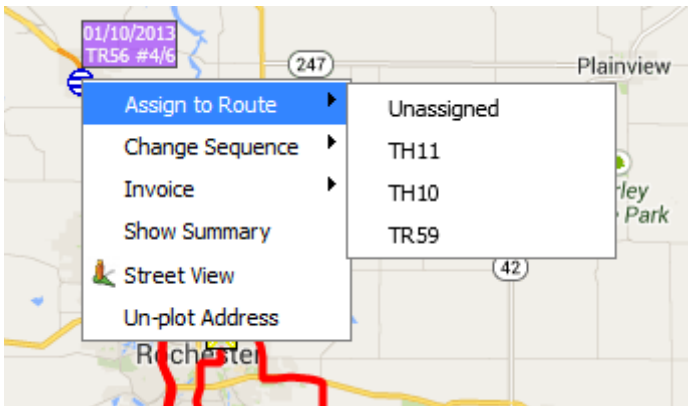
- Discards all changes, and returns back to the "Add Customer" screen.
- This customer will not be validated again, until you attempt to view their address information on any of the mapping screens in EPASS.

After validating the addresses, you will be taken back to the Dispatching Map screen

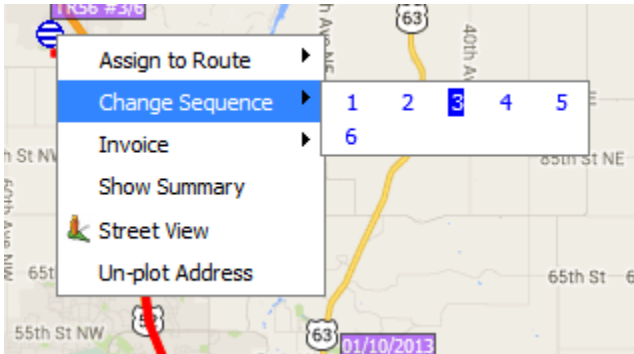
Left clicking the icons will be similar to the Invoice Call Radius screen, as seen in the Invoicing Maintenance and Address Validation guide.

Right clicking icons will have a few new functions that are not found in the Invoicing Maintenance and Address Validation guide. They are listed below:

- **Assign to Route:** allows you to assign the current service call to any of your technicians and/or drivers.



- **Change Sequence:** allows you to change the priority of the service call. For example, 1 makes it the first call, and 3 would make it the third in sequence.



- **Un-plot Address:** tells EPASS to forget the longitude and latitude intersection of this address location. This situation might arise if someone accidentally validated this address incorrectly. This option can be selected to help fix their mistake.

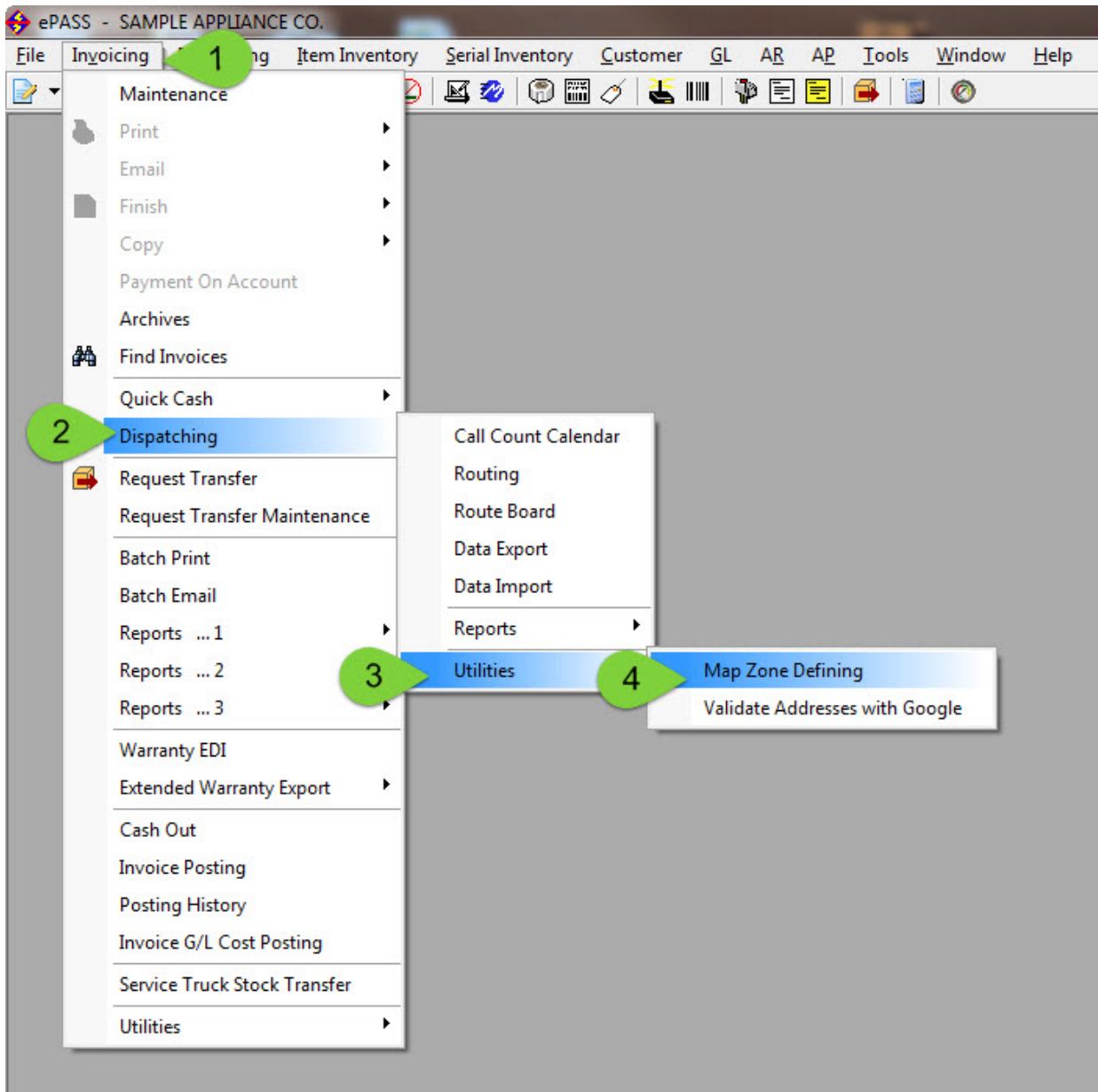
You have now finished the Google Maps integration.

Defining Map Zones

This guide will help you draw your geographical zones on Google Maps in EPASS. From there, you can overlay those zones onto any of the other maps throughout EPASS. Also, if you choose to, you can have the zone automatically filled in for new customers, based on which zone their address falls into.

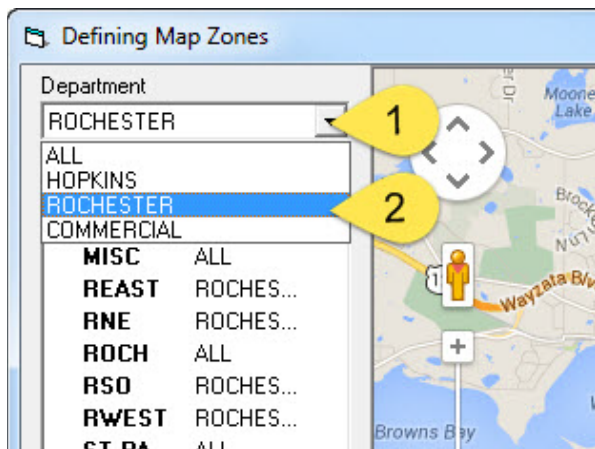
Step 1: Open "Map Zone Defining"

- Click Invoicing > Dispatching > Utilities > Map Zone Defining

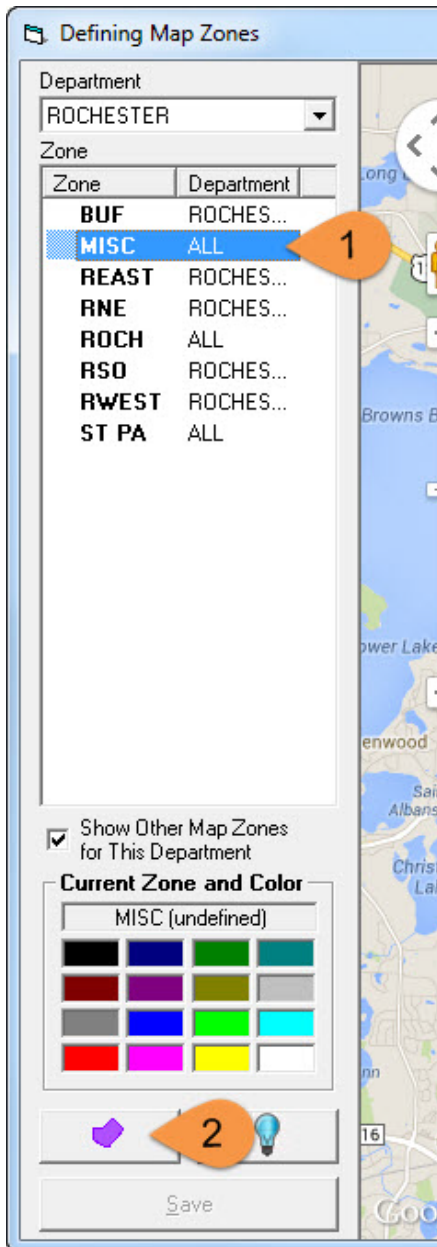


Step 2: Select Your Department and Zone, enter Edit Mode

- Select your department from the drop down menu, or if you do not use departments, then use "ALL"

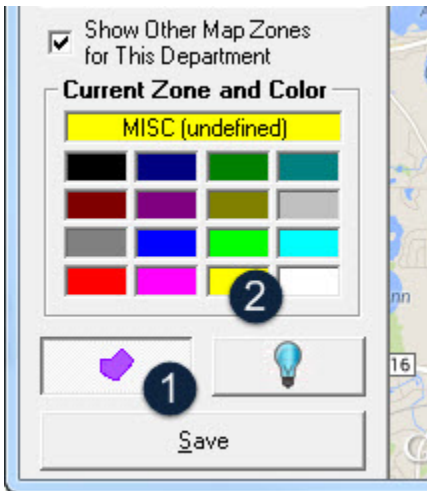


- Select your zone from the drop down menu
- Click the polygon shape button to enter edit mode

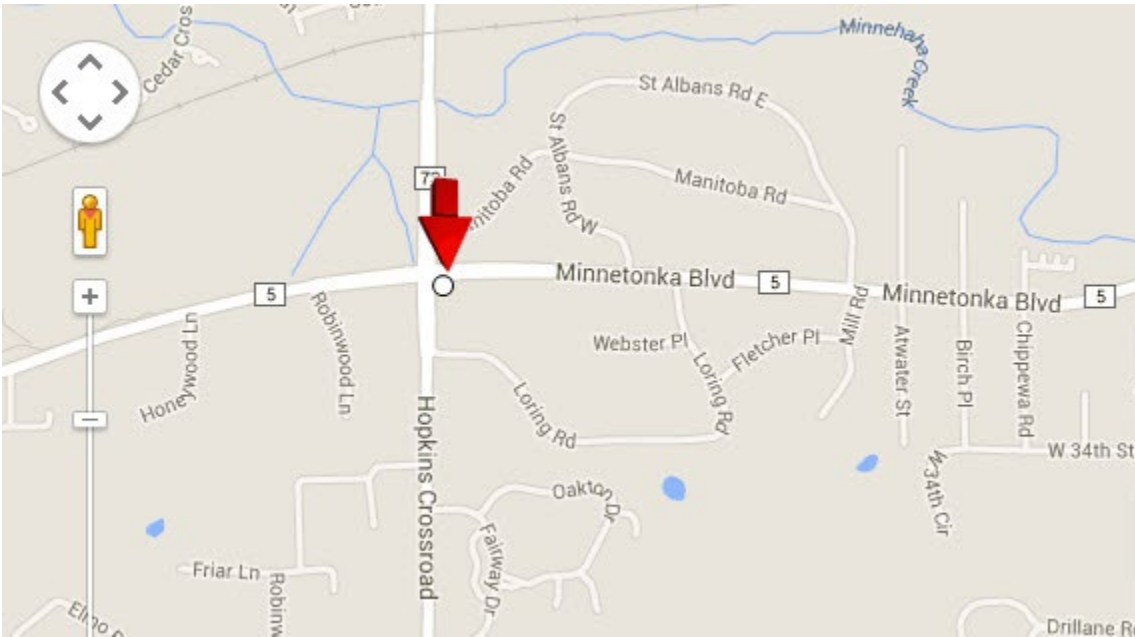


Step 3: Draw Your Zone, and Click Save when you are done

- Make sure you have clicked the polygon button to enter edit mode
- Select your color. This is optional. The default color is grey. For this example, I have selected yellow

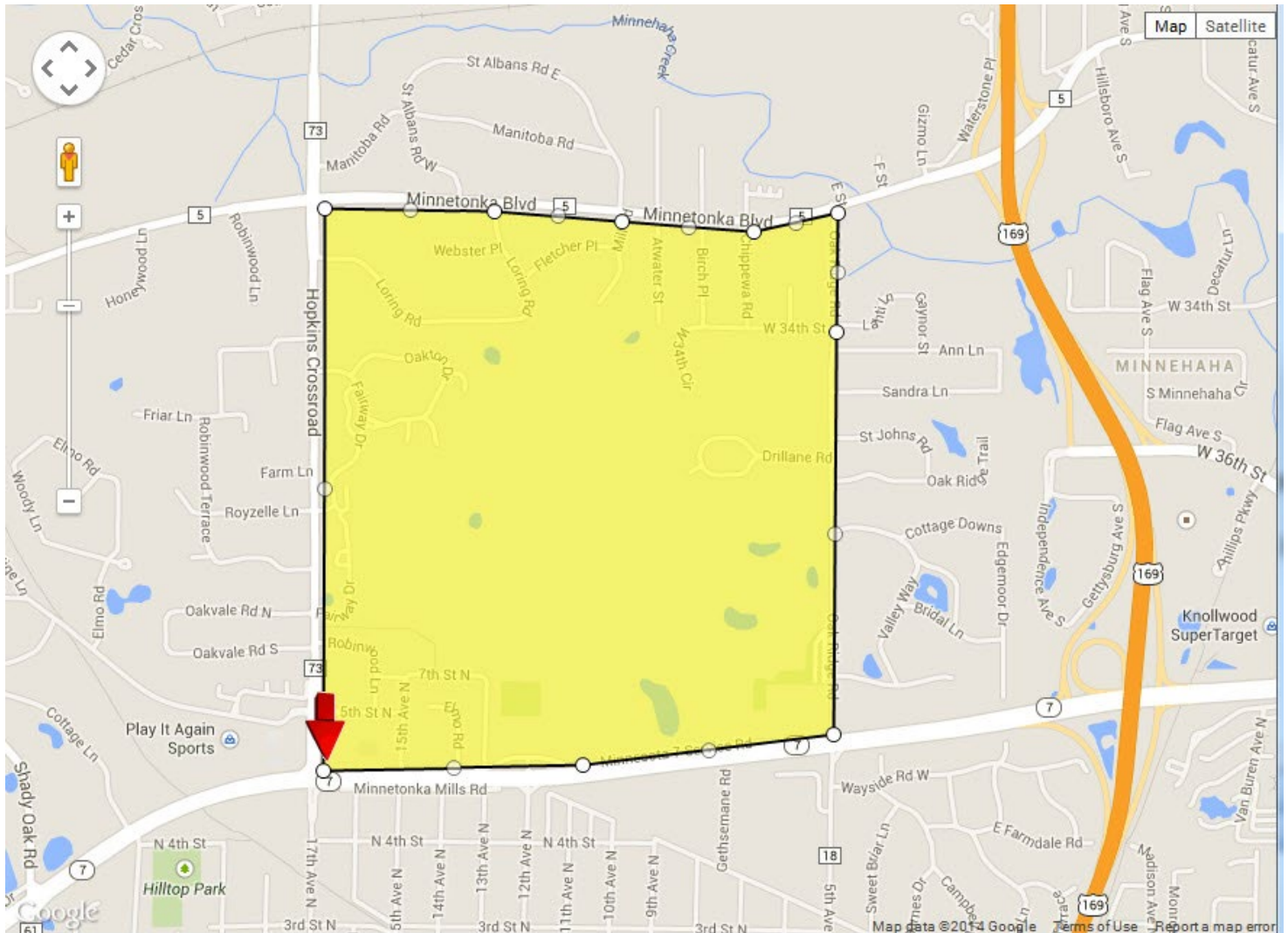


- Click anywhere on the map to plot your first point
- If you make a mistake, don't worry! Simply click the point that you just placed, and EPASS will remove that point from your zone

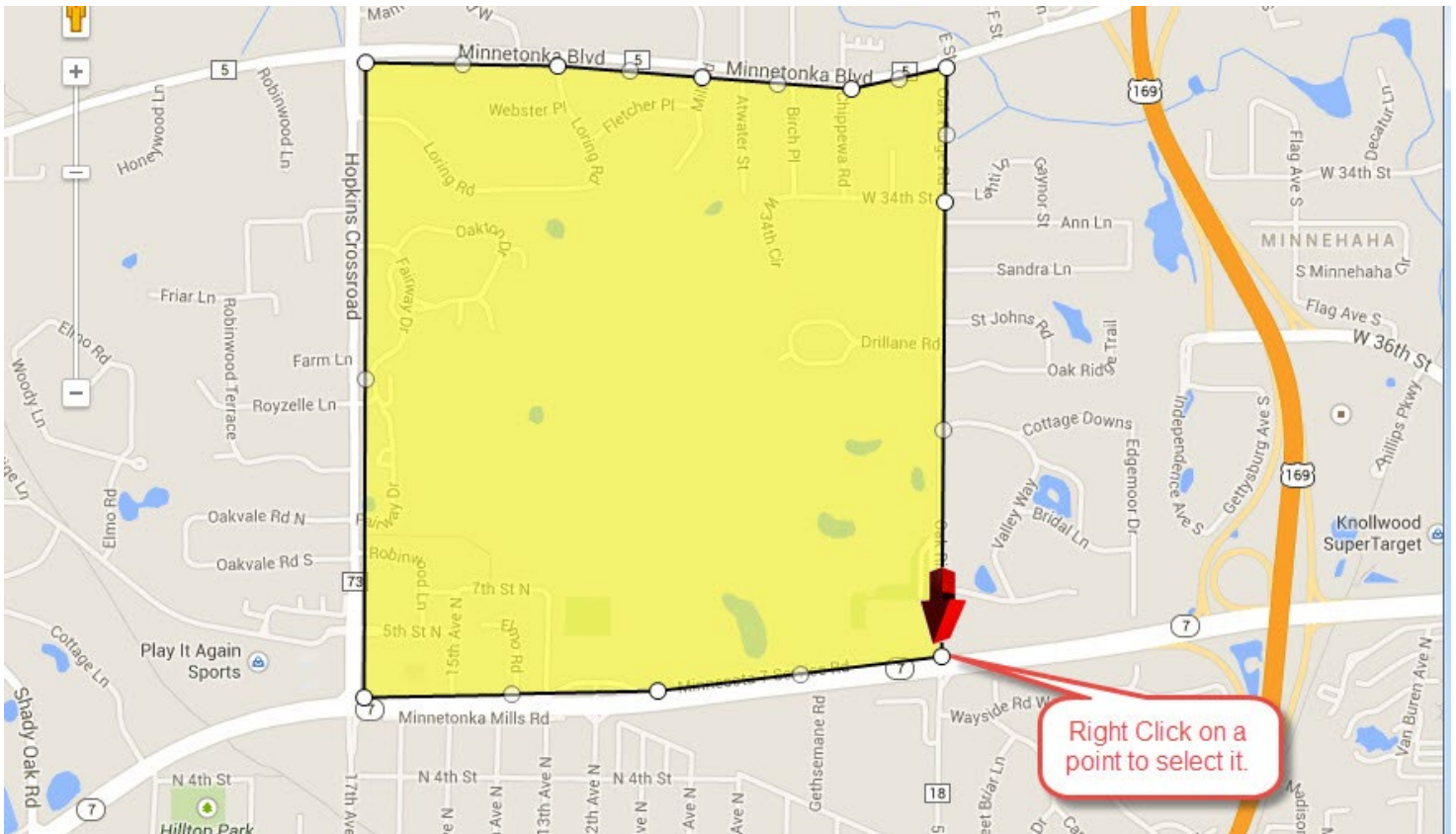


- After placing your first point, place additional points to draw out the rest of your zone. Think of it as drawing a shape on a paper map
- Between each two points that you create, there will be a potential "middle" point that is prepared by EPASS in advance, just in case you would like to make your zoning more precise
- These points can always be adjusted and re-adjusted to make your zoning as precise as you would like

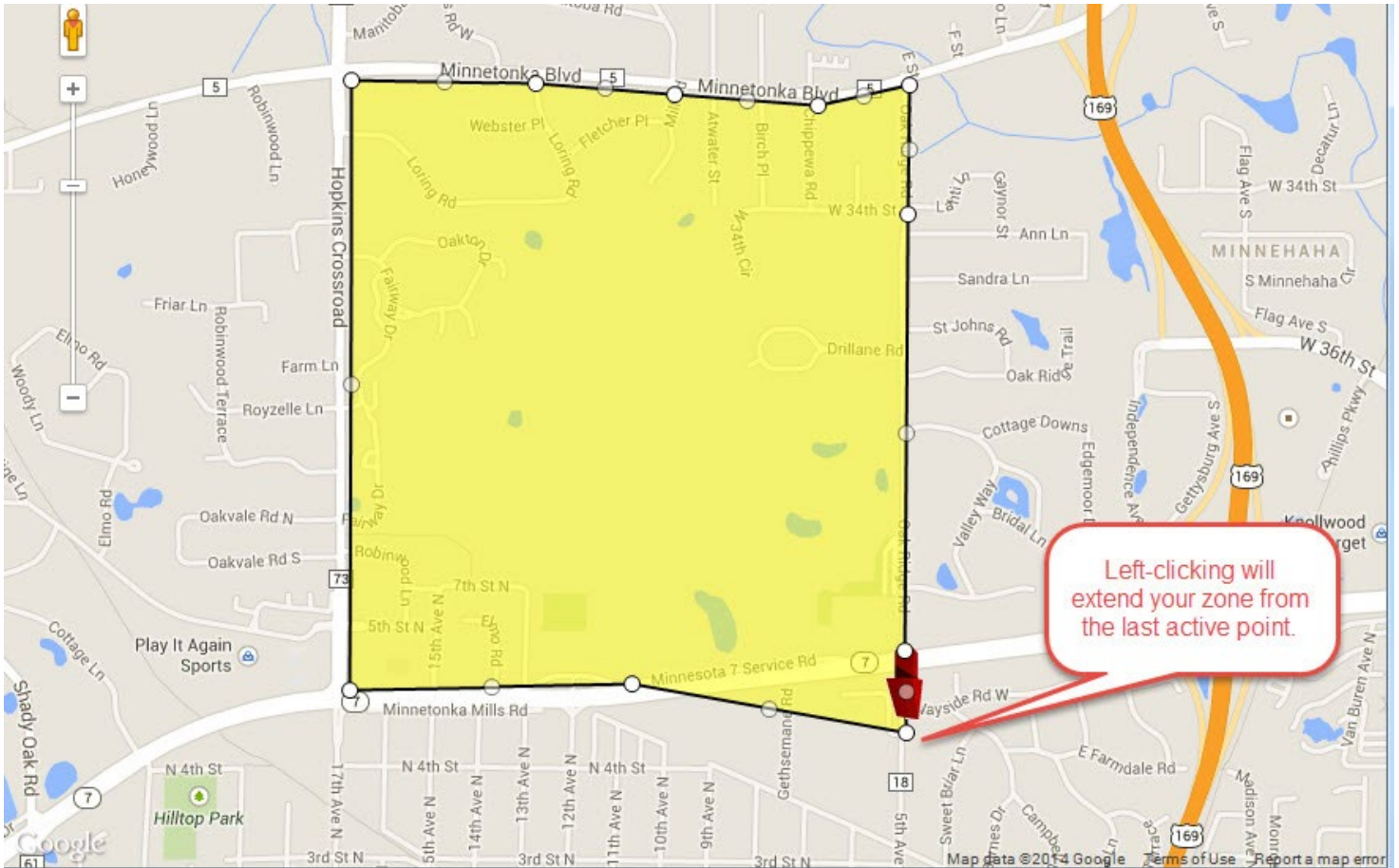
- Simply left click and drag any of the points to adjust the zone



- To edit any of your points, simply right click on a point to select it
- Once the point is selected, a red arrow will indicate which point is the selected; the active point



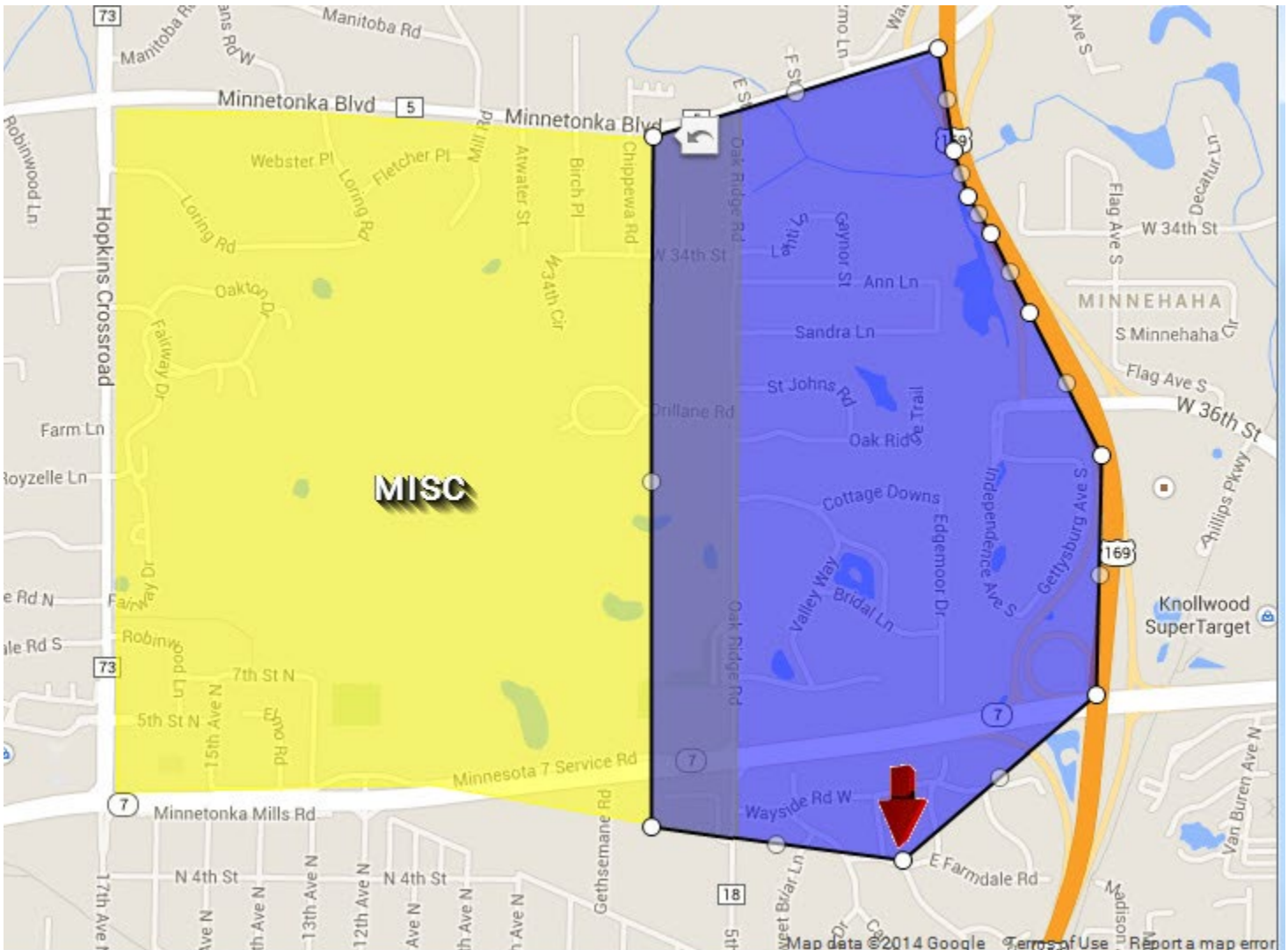
- From here, any left clicks will extend your created map zone from the point that is selected (shown by the red arrow)
- You can also hold down the left mouse button on the white circles, and drag the white circles to adjust them



- Click Save when you are done

Step 4: Defining Additional Zones

- Select the next zone that you would like to work on
- Draw your next zone on the map just like the last one. For this example, I have picked the color blue



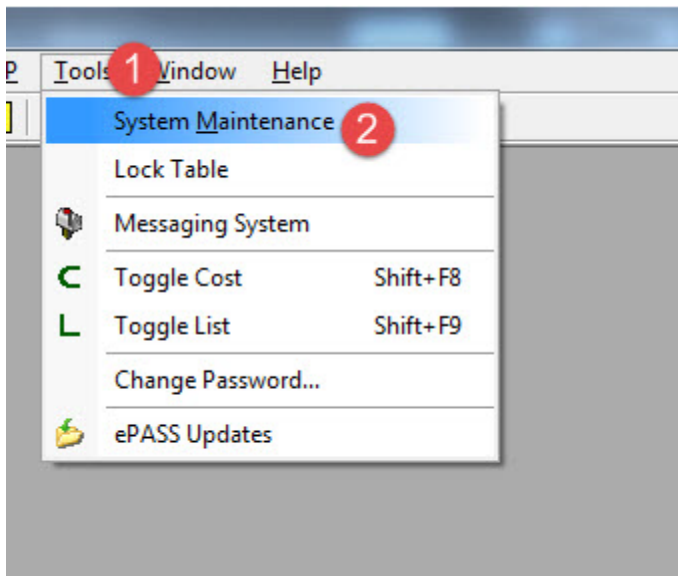
- In this example, I am adding a zone right next to my first one. This will cause part of the zone to overlap on the border. This overlap in the screenshot above is purely a visual example to show the overlap. A **small** overlap is recommended
- It is better to have zones that overlap at the border vs zones that have a gap in the middle
- If you have a call in the overlapped area, it will ask you to choose 1 of the 2 zones it could be in
- If you have a call in a gap between zones, you will have to manually enter which zone it is in

Step 5: Set New Customers to your Defined Map Zone (optional)

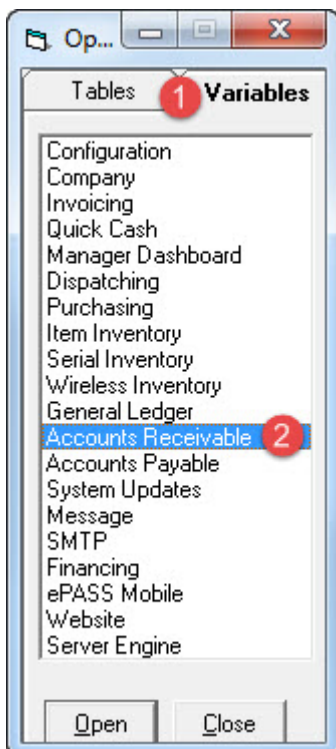
If you turn on this option, new customers will have their information stem from your defined map zones. If you leave this option off, EPASS will pull their information from the default city zones.

If you want to turn this option on, then follow these simple steps:

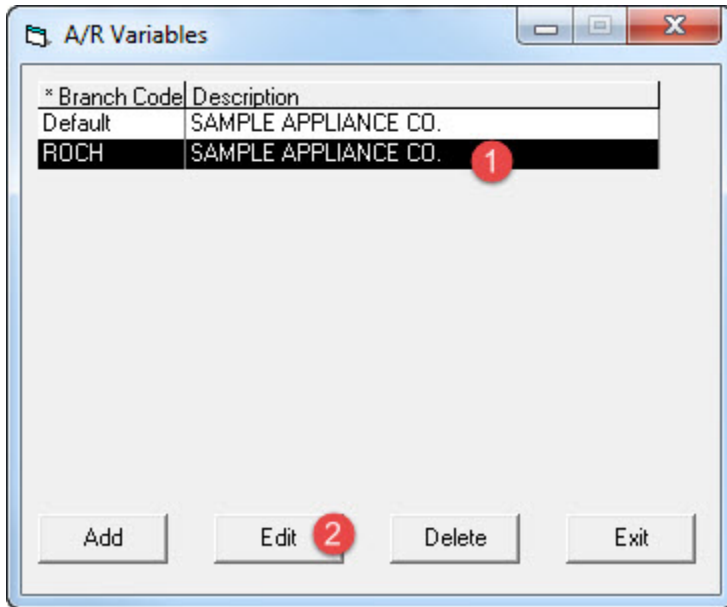
- Exit the Defining Map Zones window
- Click *Tools* and then *System Maintenance*



- Click the *Variables* tab, then click *Accounts Receivable*



- Select the branch you would like. For this example, I will choose "ROCH". Then click *Edit*



- Click the *Customer 2* tab, and check the box that says "Get Map Zone from Google Defined Zones"

Edit Accounts Receivable Variables - Branch: ROCH

SVC Charges Transactions Passwords Titles

G/L Customer 1 **1 Customer 2** Posting Statements

☒ Require Address ☒ Default Phone 1 from Account #

☒ Require City ☒ Require Phone 1

☐ Validate City ☐ Require Mailing Category

☒ Require Zip ☒ Email Address Reminder

☐ Require Directions ☐ Do not allow a duplicate SSN number

☒ Require Zone ☒ Update Finished Invoices on Upd.Key

2 ☒ Get Map Zone from Google Defined Zones

Validate Address with Customer Label

Invoice Delivery Method

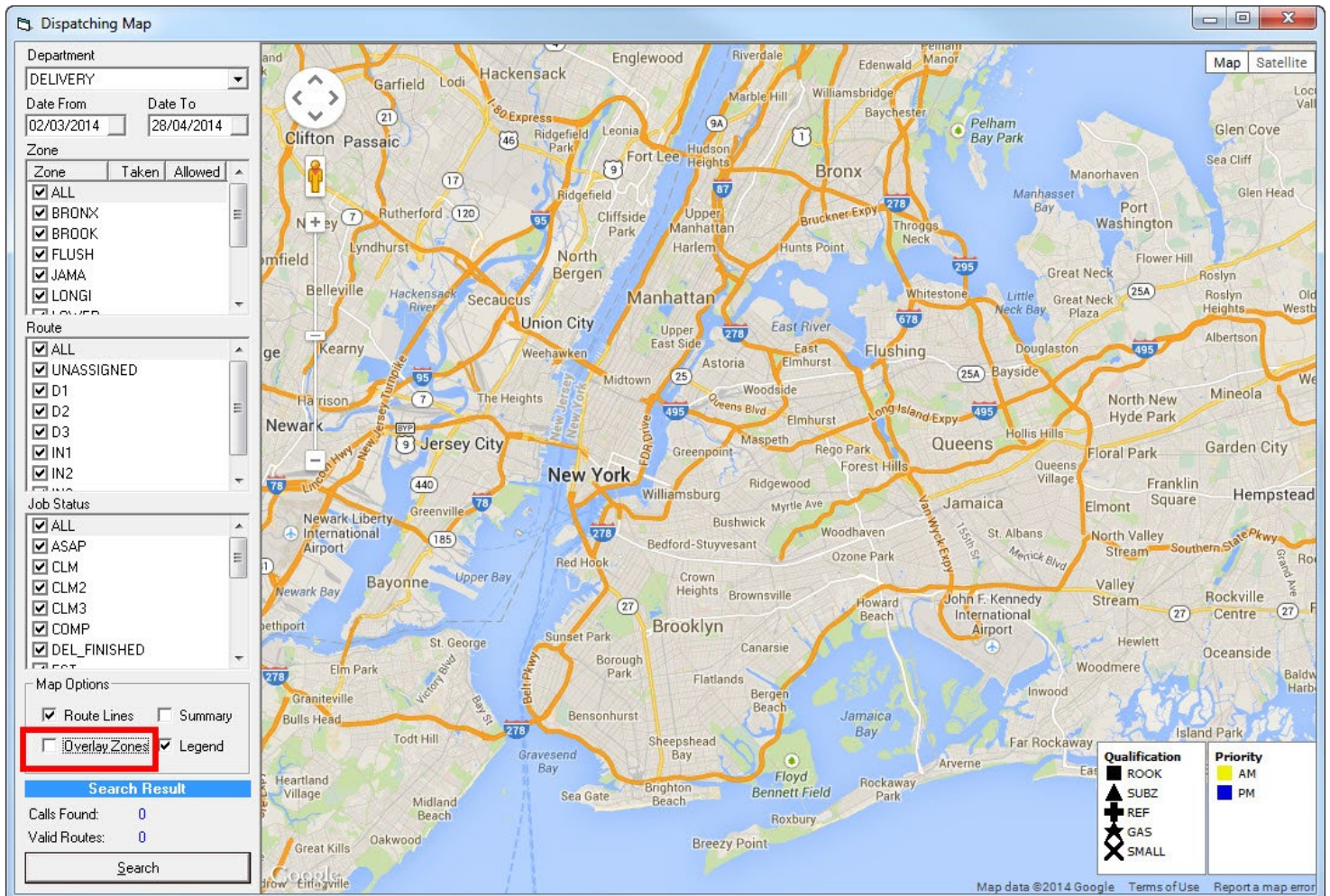
- Click OK
- Exit and restart EPASS for the new changes to take effect

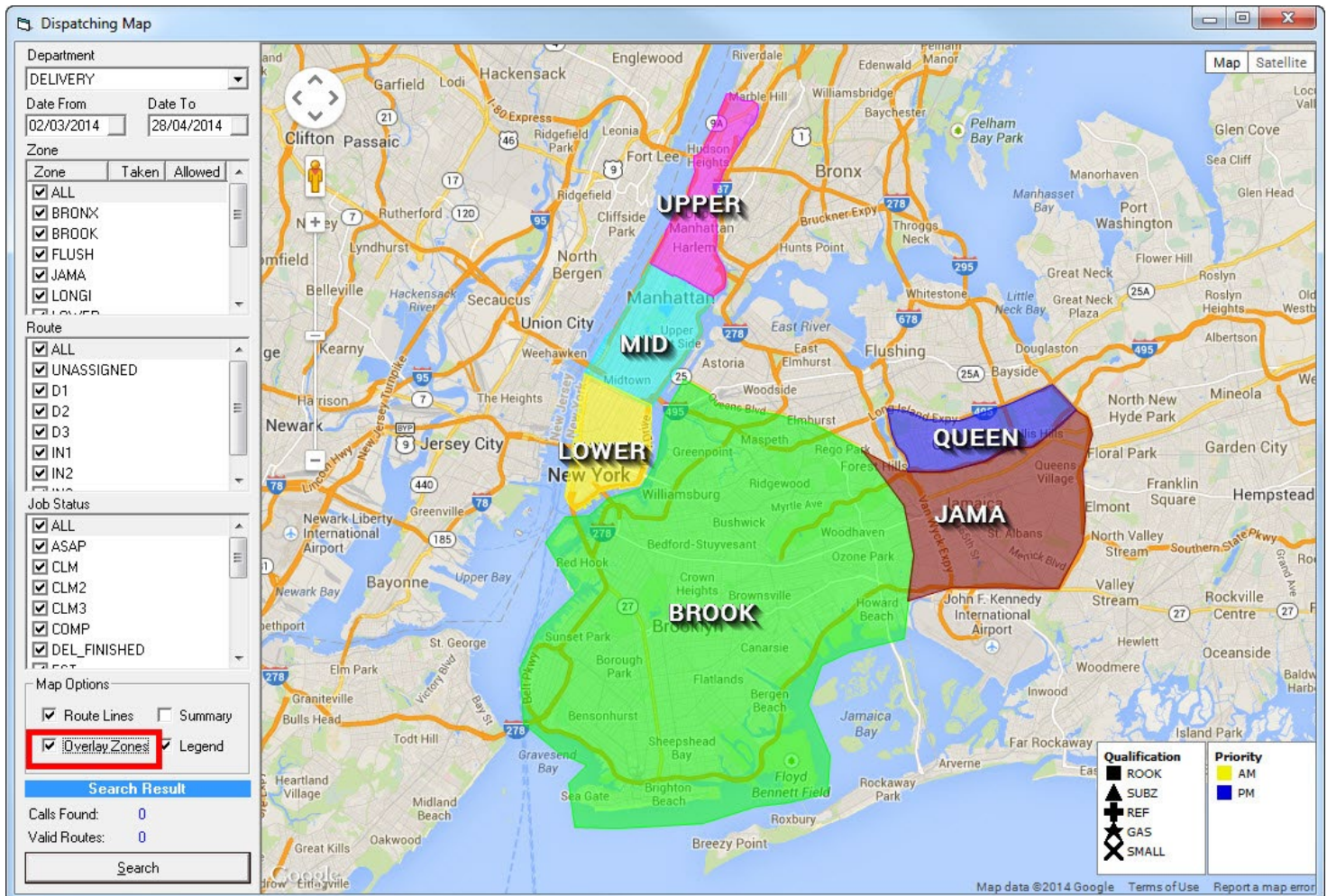
Now, all new customers that are created will stem from your defined Map Zones.

Additional Feature:

At any point while using EPASS, in any mapping screen, you can view the zones you have created!

Simply check the "Overlay Zones" checkbox in any mapping screen.

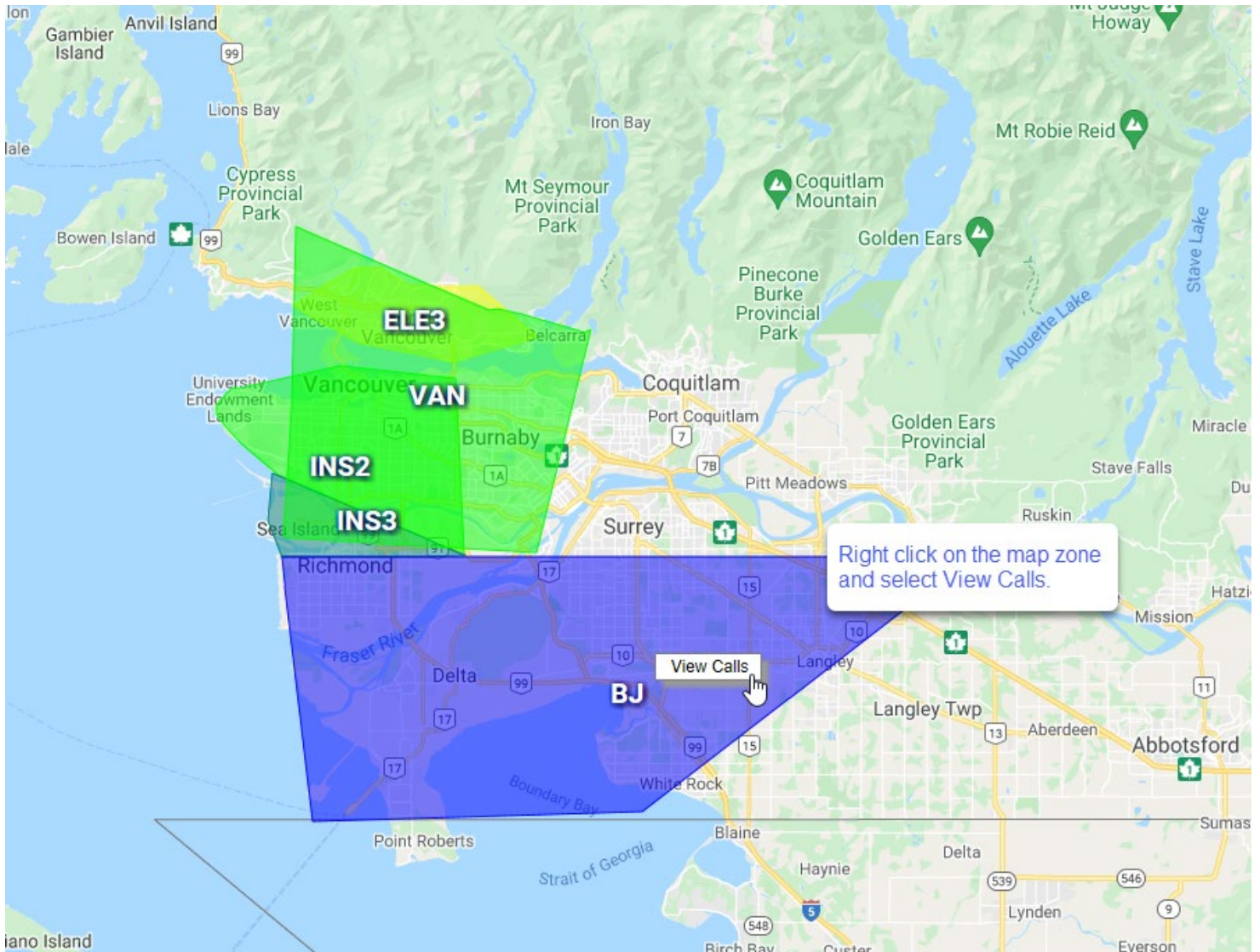




MAP ZONE LOOKUP

A new feature has been added to the Map Zone Lookup. This feature allows you to view the calls to see which days are available for delivery within the specific map zone.

Right click on the map zone and select View Calls.



Invoice Call Calendar

Schedule Date 7/12/2021

Map Zone BJ

Bob Jones

The Invoice Call Calendar will appear.

Exit

July 2021

Sun	Mon	Tue	Wed	Thu	Fri	Sat
27	28	29	30	1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31
1	2	3	4	5	6	7

Today: 7/12/2021

ROOK (0)

SUBZ (0)

REF (0)

GAS (1)

SMALL (0)

ELEC (0)

PLUMB (1)

LAST (0)

FIRST (0)

2MN (0)

AM (0)

PM (0)

AM2 (0)

JASON (0)

Day	Date	Allowed	Taken	Avail	Closed	LAST	FIRST	2MN	AM	PM	AM2
Monday	7/12/2021	100	2	98		0	0	0	0	0	0
Tuesday	7/13/2021	20	0	20		0	0	0	0	0	0
Wednesday	7/14/2021	8	0	8		0	0	0	0	0	0
Thursday	7/15/2021	8	0	8		0	0	0	0	0	0
Saturday	7/17/2021	8	0	8		0	0	0	0	0	0
Sunday	7/18/2021	500	0	500		0	0	0	0	0	0
Monday	7/19/2021	100	0	100		0	0	0	0	0	0
Tuesday	7/20/2021	20	1	19		0	0	0	0	0	0
Wednesday	7/21/2021	8	0	8		0	0	0	0	0	0
Thursday	7/22/2021	8	0	8		0	0	0	0	0	0
Saturday	7/24/2021	8	0	8		0	0	0	0	0	0
Sunday	7/25/2021	500	0	500		0	0	0	0	0	0
Monday	7/26/2021	100	0	100		0	0	0	0	0	0
Tuesday	7/27/2021	20	0	20		0	0	0	0	0	0
Wednesday	7/28/2021	8	0	8		0	0	0	0	0	0
Thursday	7/29/2021	8	0	8		0	0	0	0	0	0
Saturday	7/31/2021	8	0	8		0	0	0	0	0	0

Allowed 100

Taken 2

Available 98

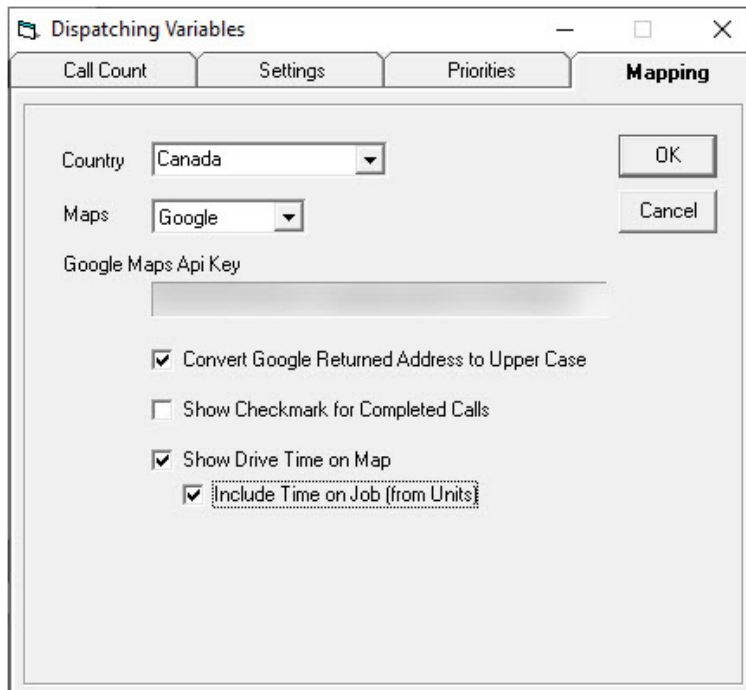
Unsolved Addr.

Invoice #	Customer	Address	Phone	ZipCode	MapRef	Pty	Spec Req	Units	Map	Directions	Route	Seq	Time	Job Status
1	SA00010206	BROWN K	12227 N SPRING CR	60588888	80138			2	BJ	sffsfiff	BJ	1		FIRM

Mapping Drive Times

Setup Mapping feature – Drive Times

This is enabled in Dispatching Variables. The option *Include Time on Job (from units)* requires you to have the minutes per unit set on the *settings tab* of Dispatching Variables. Make sure the country is set correctly as this controls if the distances are in miles or kilometers.



The screenshot shows the 'Dispatching Variables' window with the 'Mapping' tab selected. The window has a title bar with a minus, maximize, and close button. Below the title bar are four tabs: 'Call Count', 'Settings', 'Priorities', and 'Mapping'. The 'Mapping' tab is active. Inside the tab, there are two dropdown menus: 'Country' (set to 'Canada') and 'Maps' (set to 'Google'). To the right of these are 'OK' and 'Cancel' buttons. Below the dropdowns is a text field for 'Google Maps Api Key'. Further down are four checkboxes: 'Convert Google Returned Address to Upper Case' (checked), 'Show Checkmark for Completed Calls' (unchecked), 'Show Drive Time on Map' (checked), and 'Include Time on Job (from Units)' (checked). The last checkbox is highlighted with a dashed border.

On the branch and/or invoice type, you need to have the start address filled in. This menu is populated by the Destinations table.

Edit Branch 50 Goemans Stoney Creek

Branch | Logo | PBX Settings | Payment Processing | Tax | SMTP | Location

Code: 50

Description: Goemans Stoney Creek

Description for Printing:

Address 1: 903 Queenston Road

Address 2:

City: Stoney Creek, ON

State: Zip Code: L8G 1B6

Telephone 1: (905) 664-2035

Telephone 2:

Fax: (905) 664-2857

E-Mail:

Website:

Profit Center: -50

Print Auto Number: 405,741

Display Code in Serial Maintenance: GL1

Display List Price in Serial Maintenance: GL1

Sales Division: All

Start Address:

OK

Cancel

Edit Invoice Type GAP STONEY CREEK APPL. SALES 2

Settings 1 **Settings 2** Settings 3 Settings 4 Required Fields G/L Allocation Printing

Default Department: **DELIVERY** ☐ Default Department From Terminal OK

Secondary Department: Cancel

Enable Branch based Min Deposit: ☐

Minimum Deposit Percentage: **25.00** %


Department: ☐ ALL ☒ DELIVERY ☒ **INSTALLATION**


Sales Division: ☒ TG Appliance Group Head Office ☐ Tasco Retail ☒ **Goemans Retail**

Serial Type: ☒ FLOOR ☒ **SRC** ☒ RETAIL

Primary Division: **RETAIL**

Division For Verification: **RETAIL**

Start Address  **SC** ☐ Goemans Stoney Creek



Using the feature in EPASS

Invoicing

Invoices will show a box on the dispatching tab; this is the distance from the branch/invoice type destination to the customer address. You can mouse over the box to get a tool tip that displays the address it is calculating from.

Review Invoice # G000145597 - DIDOMENICO, LOU/TINA

Invoice Service **Dispatching** Invoice Cont. Warranty Documents Notepad


All Calls

Primary	Zone	Date	Route	Units	Department	Special Request

OK

Detail

Review Add Edit Delete

 **Driving to Customer**
27.0 km -- 23 mins

Primary Call Only

Map Zone HAM ☐ HAMILTON/HALTON Map Ref Schedule Date 00/00/00 Trip Status

Req Route Route

Department DELIVERY

Priorities Add Delete Qualifications Add Delete

Requested Time 00:00 ☐ Completed

Units 1 In 00:00

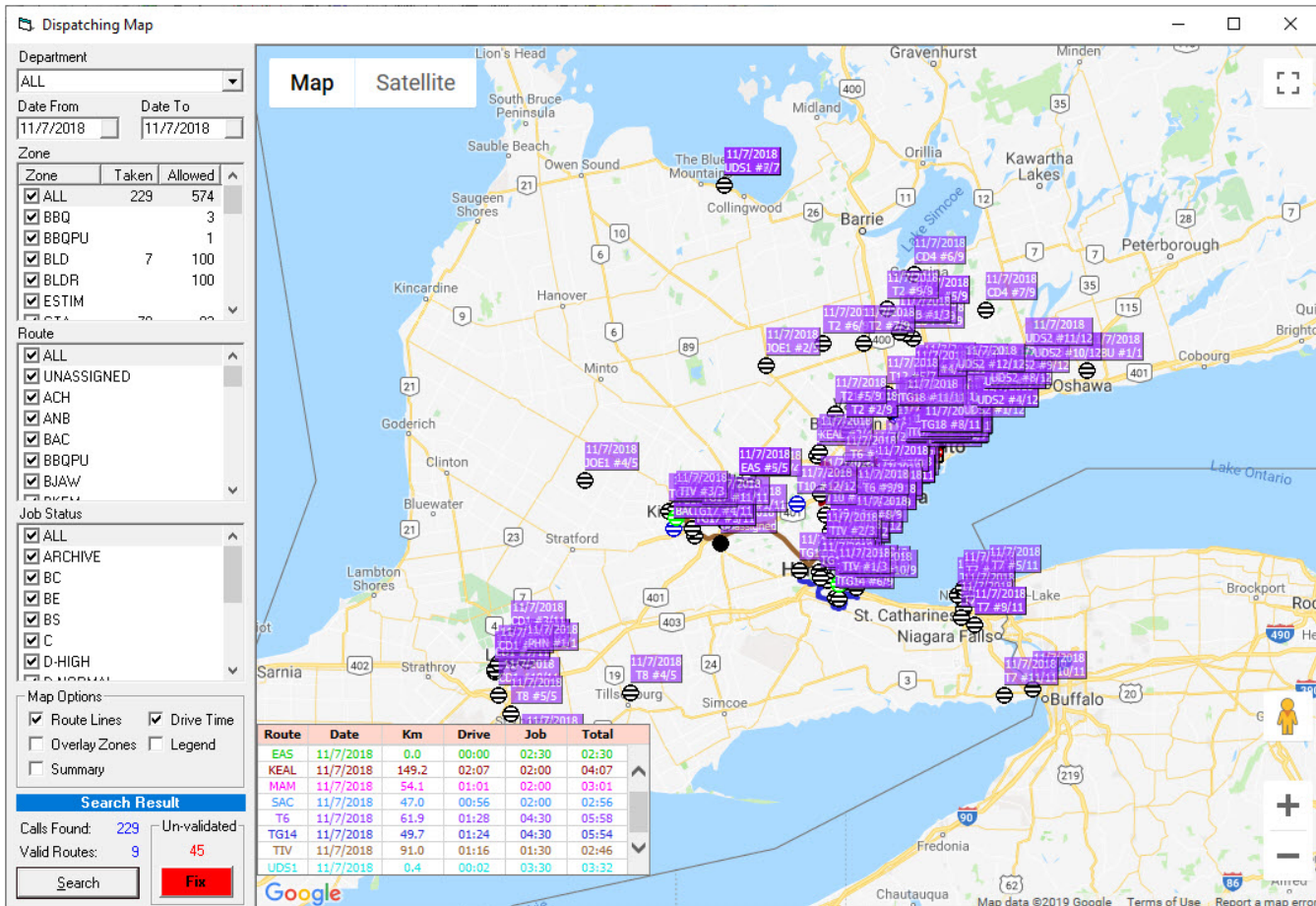
Call Seq 0 Out 00:00

Special Request

Map

Mapping

There is a *Drive Time* check box on the mapping screen that will hide the legend if selected. This is the screen shown if you have *Include Time on Job (from units)* enabled:



Route: The route code

Date: The date of the deliveries/service calls

Miles/KM: Total distance between all calls

Drive: Total drive time between calls

Job: Total time on calls (sum of units * minutes per unit from dispatching variables)

Total: Sum of drive and job giving total time for the day's calls

If you do not use *Include Time on Job (from units)* you get a slightly different screen

Looking Up an Address and Viewing Map Zones

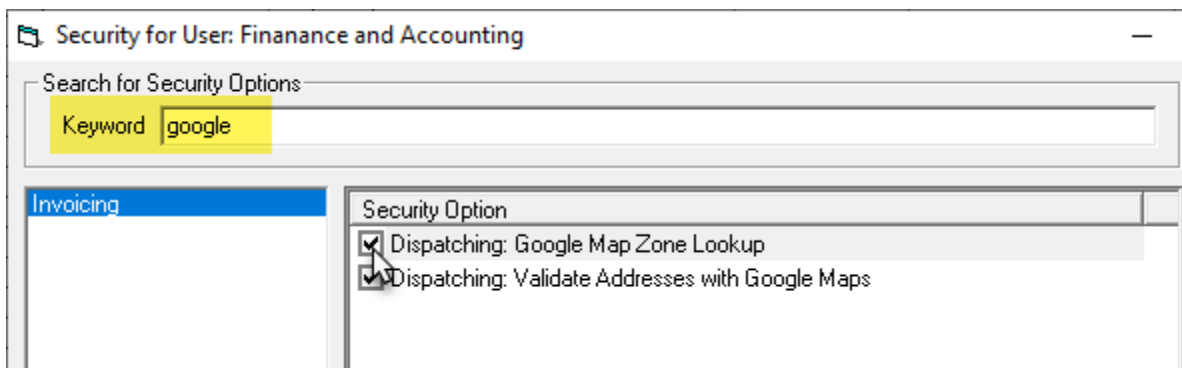
You can use the Google Map Zone Lookup utility to view your defined Map Zones. Entering either a zip code or full address centers the map on the location. Your Map Zones are overlaid on the map, providing you with a quick map zone lookup.

Before Starting:

To use this feature, a user needs this security option: **Dispatching: Google Map Zone Lookup**.

To Enable the Security Option:

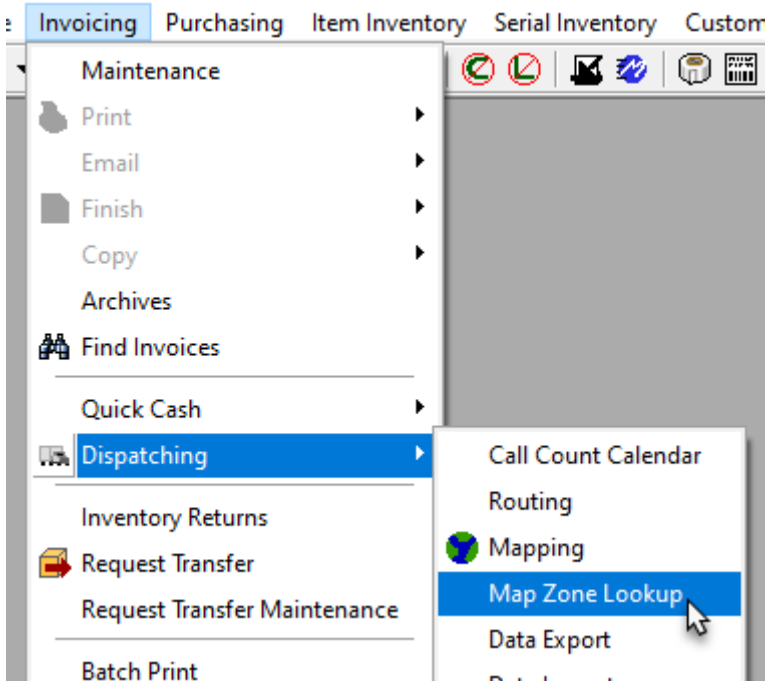
1. Go to **Tools > System Maintenance**. On the **Tables** tab, select **User Security**, and then click **Open**.
2. Select a User Group from the list, and then click **Security**.
3. In the **Keyword** search box, enter **GOOGLE**. Select **Dispatching: Google Map Zone Lookup**.



4. Click **OK**.

Looking up an Address and Viewing Map Zones:

1. Go to **Invoicing > Dispatching > Map Zone Lookup**.



2. Enter the full address or zip code, and then click **Search**.



The address or zip code is pinpointed on the map, and your Map Zones overlay if they are defined in EPASS.

