

Service Director

Streamlined, intuitive work order and service management

Traverse Service Director is a comprehensive work order and service management system well suited for your on-site, depot, or internal company needs. Service Director is designed for a wide range of businesses including installation, repair, maintenance service, manufacturing, and construction companies. In short, Traverse Service Director empowers you to manage your service calls like never before.

Traverse Service Director's powerful dispatching capability offers your company unparalleled system flexibility. Quick work order entry and scheduling gives your customers fast, efficient call handling. With Service Director's work order command center concept, you can quickly and easily accomplish daily tasks. Flexible customer invoicing

for time and materials is available for a single dispatch or a series of dispatches.

An interactive graphical calendar view gives you flexibility and control over your service calls. A technician schedule/dispatch console allows dispatchers and service managers to do their daily work functions and maintain visibility of their technicians, work orders, and schedules. Save time while performing call entry, scheduling, dispatching, parts/labor entry, and billing.

The interactive views in Service Director allow you to search for information and easily adjust inquiries. You'll be able to serve your customers more quickly and keep your key service technicians doing what they do best.

The screenshot displays the Traverse Service Director software interface. The main window is titled "SD Service Order Entry" and "SD Calendar". The interface is divided into several sections:

- Left Sidebar:** Contains navigation options such as "Purchase Order", "Sales Order", "Service Director", "Interactive Views", "Dispatch", "Calendar", "Dispatch Console", "Scheduled Technician View", "Scheduled Dispatch Report", "Unscheduled Dispatch Report", "Work Orders", "Service Orders", "Service Order Entry", "Generate Service Orders", "Print Service Orders", "Service Order Report", "Service Order Worksheet", "Transactions", "Post Service Orders", and "Management Reports".
- Top Panel:** Includes a search bar, "Refresh", "Day", "Work Week", "Week", "Month", "Schedule View", "Resource", "Suggest", and "Technician" dropdowns.
- Central Calendar:** A Gantt-style calendar view showing technician schedules for BTJ and CMJ from Monday, Dec 2 to Friday, Dec 6. The calendar has a time axis from 6:00 to 9:00. A blue block for "General Cleaning" is visible on Wednesday, Dec 4, and a pink block for "Plumbing Work" is visible on Monday, Dec 2.
- Right Panel:** A "Date Navigator" showing a monthly calendar for December 2019 and January 2020, with a "Today" indicator.
- Bottom Panel:** Shows "demo", "JMR", "Fiscal Year: 2019", and "Payroll Year: 2018".

Additional Service Director Features

- Enter or update work orders as calls come in.
- Maintain parts lists, knowledge base articles, and service history.
- Import product information from vendor catalogs.
- Speed up entry of similar content into work orders using templates.
- Create user-defined equipment types, and define multiple warranty periods and service intervals.
- Identify requests covered under warranty and automatically adjust billings accordingly.
- Bill third-parties such as manufacturers or insurance companies.
- Track the movement of equipment from one customer site to another, or back to your stock, all while maintaining equipment history.
- Bill dispatches individually, or combine multiple dispatches for a work order onto a single billing.
- View scheduled work orders in a calendar format, and drill down into details.
- Access street maps of customer sites with a single button using web-based mapping integration.
- Dispatch technicians by service zone.
- Automatically total parts and labor costs against a work order or service order with cost tracking.
- Track customer contracts with the ability to assign work orders to a contract.
- Use Design Studio to customize your work order and service invoice forms.
- Take advantage of full integration to Accounts Receivable, General Ledger, and Inventory.

Service Director Views and Reports

Calendar View

Scheduled Technician View

Scheduled Dispatches

Unscheduled Dispatches

Equipment History View

Profitability

Productivity

Order History

Work Orders

Work Order Worksheet

Service Orders

Service Order Worksheet