Application Notes

NexTraq®

Managing Dispatch Jobs with Deferred Delivery

Overview

The NexTraq® Fleet Dispatch options include deferred job delivery and a corresponding job status, Queued. The deferred delivery option provides additional flexibility and enhances the dispatcher's ability to manage jobs within the NexTraq solution. The dispatcher can create a job with all the location and assignment information and select a future time for delivery to the assigned mobile or NexTraq Connect™ user.

Creating Jobs

To create a job for deferred delivery time:

1. Open the Job window using InstaView tab mobile options or the Create Job button on the Dispatch tab.

2. Complete the job specifics including job name, message for driver, destination, start time, and estimated duration of the job. Enter any values for custom job fields you may have created. Add a note about this job, if desired.

3. Click Assign by Mobile or Assign by User to display the list of available assignees. Click the assignee name to select it.

4. Click the Send Later option. Select a date and enter the time for the deferred job delivery.

5. Click Save.

If you have not entered a future delivery date or time, a message displays requiring confirmation of which action you intend.
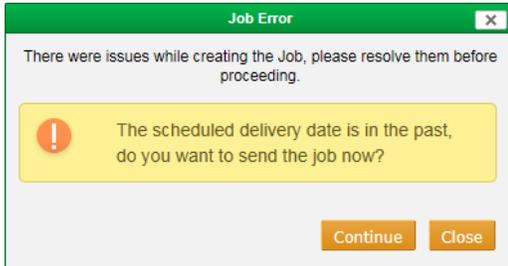
Click Continue if you want to send the job right away instead of deferring the delivery. The job will be sent to the selected assignee and it will be listed in the Dispatch Jobs list with a status of Dispatched.

Click Close to return to the job details window to revise the date and/or time for the deferred delivery. Then click Save. The job will appear in the Dispatch Jobs list with a job status of Queued.

Deferring Delivery of Jobs in Routes

Deferred delivery is also available for jobs in multi-stop routes from the Dispatch tab or the Routes tab.

> **NOTE:** To use Custom Job Field values and/or add Notes in jobs in a route, set up each job for deferred delivery. Then edit each job in the Dispatch Jobs List on the Dispatch tab, entering the value for your Custom Job Field and content for your notes.

To defer delivery of jobs in routes:

1. On the Dispatch tab options, click the Route icon 📇 in the Mobiles list or the Users list to open the Select a Route box. Select a route from the drop-down list and click OK to open the Send Route dialog box. The Mobile or User will be automatically selected in the Assignee option.
   OR
   On the Routes tab, click the edit icon 👤 for a route from Route List or create a new route. Click the Send as Jobs button to open the Send Route dialog box. Choose an assignee.

2. In the Job List section, the details for each stop in the route include the Send to Driver Now option. By default the option is checked. Uncheck the checkbox to create a deferred delivery date/time.
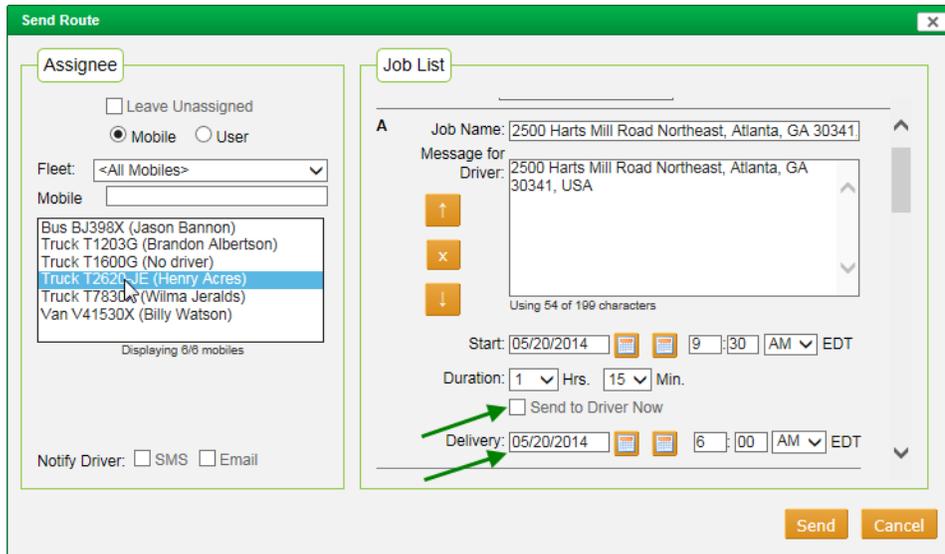
3. Enter the deferred delivery date and time. The delivery time defaults to the time specified in Dispatch Settings under the Admin tab on the Account page.

> **NOTE:** The dispatcher may set a deferred delivery time for any job in the route. Uncheck the Send to Driver Now option in each job you want to defer delivery. The delivery times for jobs in the same route do not have to be the same.

4. When all the desired information for the route is complete, click Send.

The deferred delivery jobs in the route will appear in the Dispatch Jobs List with a job status of Queued. All other jobs in the route will appear in the list with a job status of Dispatched.

Managing Jobs

Editing Jobs

Like other assigned jobs, queued jobs appear in the Dispatch Jobs list and may be copied or viewed. In addition any of the information for a queued job may be edited, including the destination, assignee, job name, job message, driver notification preference, and details concerning deferred delivery of the job.

To edit a queued job:

1. Click the edit icon 👨 in the queued job row to open the Job dialog box.

> **NOTE:** In the Destination options, "Original" is the Source of the job location for the Queued job. When the Source is changed and a different location is chosen or entered, "Original" in the edited and saved job will refer to the revised location.

2. Change any of the details in the queued job as needed. In this example, the job's delivery time was edited.
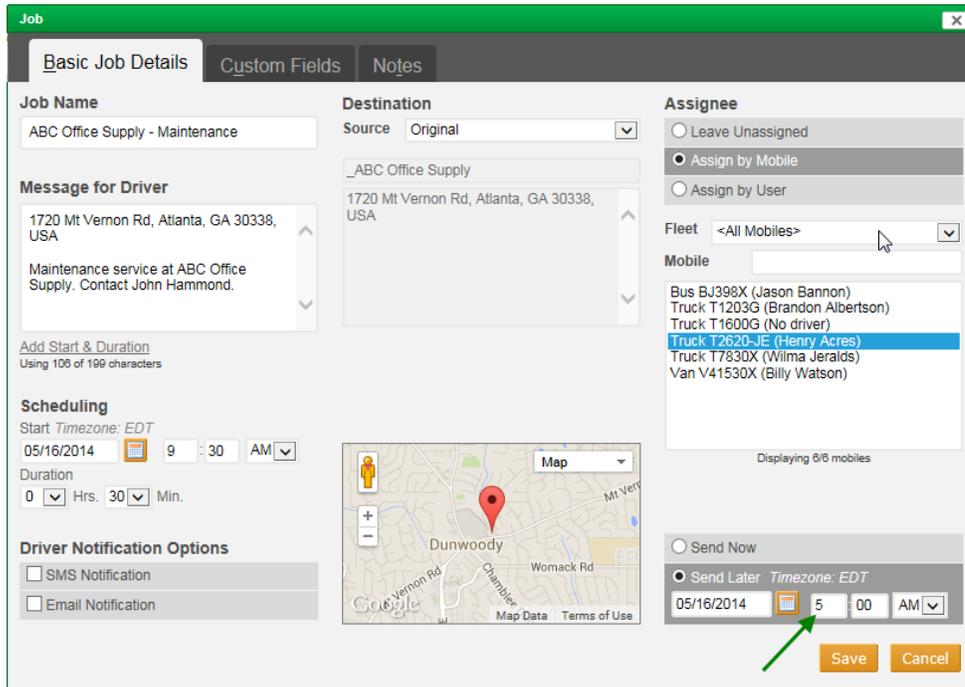
3. Click Save to apply the changes.
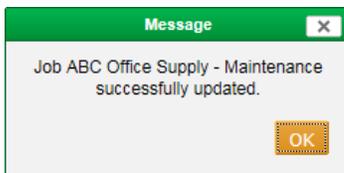
4. A message displays to confirm the successful update of your job information. Click OK to close the message.

The updated job is queued for delivery to the driver with the changes you have made. Your job will be sent to the designated assignee at the time scheduled.

> **NOTE:** If the delivery time is within 15 minutes of clicking the Save button, it will be sent immediately.

Delivering Jobs

At the designated delivery time, the job is sent to the assignee and the job's status changes to Dispatched when the Dispatch screen is accessed or refreshed.

From this point on, the job options are the same as with any other job. The job status changes as usual as the job progresses toward completion.

Filtering Jobs

The Queued job status is also included in the Filter Jobs criteria for the Dispatch Jobs list, making it easy to find all queued jobs with a few clicks.

To filter jobs by Queued status:

1. On the Dispatch List page, click Filter Jobs to open the Filter Criteria dialog box.

2. Click Queued in the Status list to highlight it and click Apply Filter.

3. The resulting jobs list will contain only those jobs with a status of Queued.

The dispatcher may choose any of the additional filter criteria to further narrow the list and find the information he needs. To display the complete Dispatch Jobs list again, click Remove Filters.

Default Deferred Delivery Time

On the Account page under the Admin tab, the Dispatch Settings option allows you to create a deferred delivery default time.

To set a default delivery time:

1. Click Account on the Admin tab menu to open the Account & Contact Information page.

2. Locate the Dispatch Settings section below the Contact Information.

Dispatch Settings

This will set the default **Deliver To Mobile** time on its scheduled day.

Default Job Delivery Time: 6:00 AM ▾

3. Choose the default deferred delivery time from the hourly time slots in the drop-down list.

4. Click the Update Account button at the bottom of the page.

Each time you create a deferred delivery job, the default time selected on the Account page will automatically be entered on the job. Dispatchers can change the delivery time for individual jobs as appropriate. The default delivery time provides a useful shortcut in completing the job details.

Deferred delivery provides a valuable tool to the dispatcher in effectively managing job distribution and meeting the customers' requests and requirements.

Additional Information

For more information, contact NexTraq Customer Support at 678-762-6850 or 800-358-6178 (toll-free) or via email at customersupport@nextraq.com.