DISPATCHER

Administrator User Manual

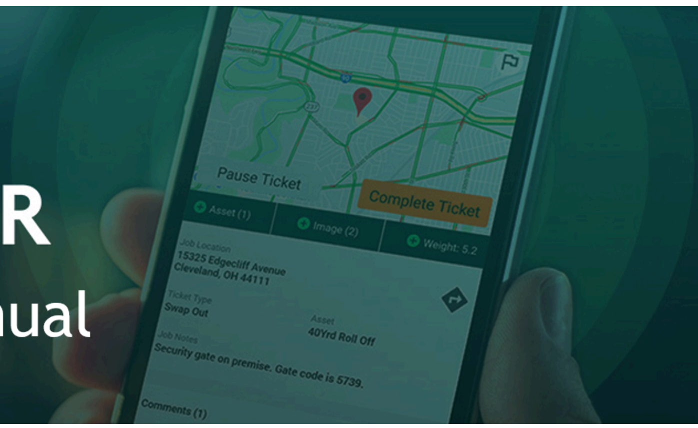


Table Of Contents

Navigating Dispatcher

Logging In

At the beginning of training, you'll receive your login credentials (username and password) from either the Dispatcher team or your administrator. Your username will be the email address associated with your profile. Therefore, each user must have a unique email address.

If you ever need to reset your password, visit https://app.dispatcher.com/initialize-password-reset.

View a list of all active and deactivated users within your company by navigating to the Company Team section. Add, deactivate, or reactivate past profiles at any time. If you deactivate a user that you do not plan on filling the position for, contact Client Support so your subscription is adjusted accordingly.

Accessing the Web App

Dispatcher is a cloud-based web application, meaning you can access it from anywhere with an internet connection. Simply open your preferred web browser on your computer, phone, or tablet and navigate to app.dispatcher.com in the address bar.

For quick access on your computer, you can save Dispatcher to your favorites or bookmarks. You can also save an icon on your mobile home screen:

1. Go to **app.dispatcher.com** on your phone's browser
2. Click the **share** button on iOS or **menu icon** on Android
3. Select **Add to Home Screen**

Accessing the Mobile App

The Dispatcher.com Mobile App is available for both Android and iOS devices. Simply search for "Dispatcher.com" in the appropriate app store:

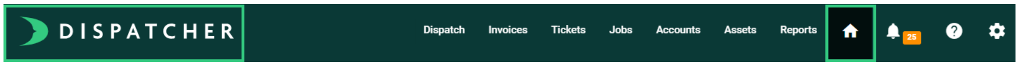
- Play Store (Android)
- App Store (iOS)

Once downloaded, use your login credentials to access the app.

💡**Dispatcher Tip:** While the Dispatcher mobile app offers some administrative capabilities, it is primarily designed for drivers. We encourage administrators to download the Dispatcher.com Mobile App on their own devices, create a test account, and test tickets to gain a driver's perspective. This will help determine how to best utilize each field and feature to suit your team's needs.

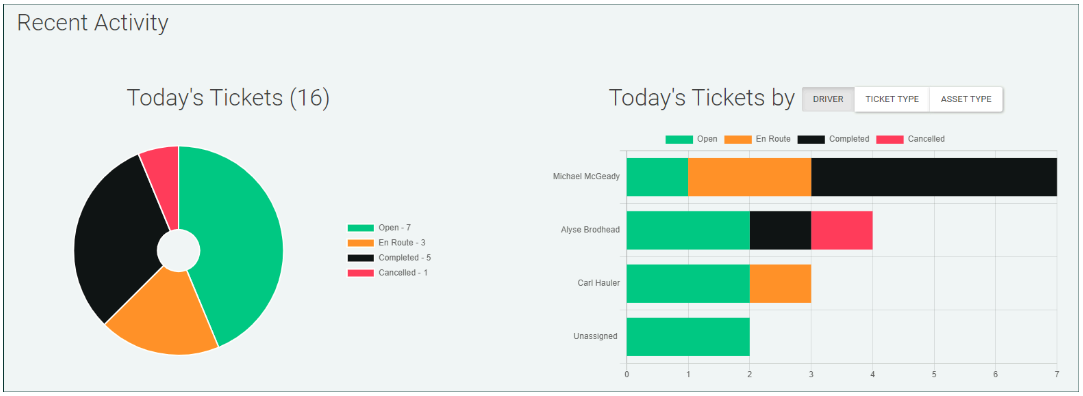
Dispatcher Homepage

When you first login, you will see the homepage. You can always navigate back to this page by clicking the Dispatcher logo or the home icon in the main menu.



Today’s Tickets

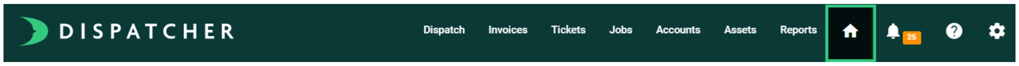
Two charts provide a snapshot of the status of your tickets for today. View by Driver, Ticket Type, or Asset Type and click on a piece of the charts to view additional details.



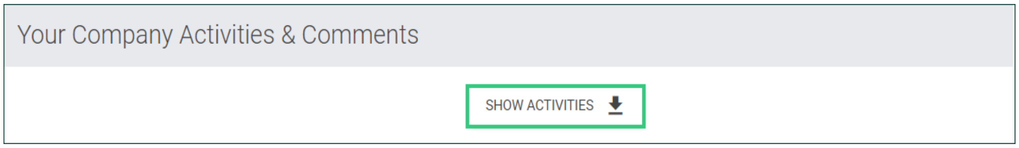
Company Activities & Comments

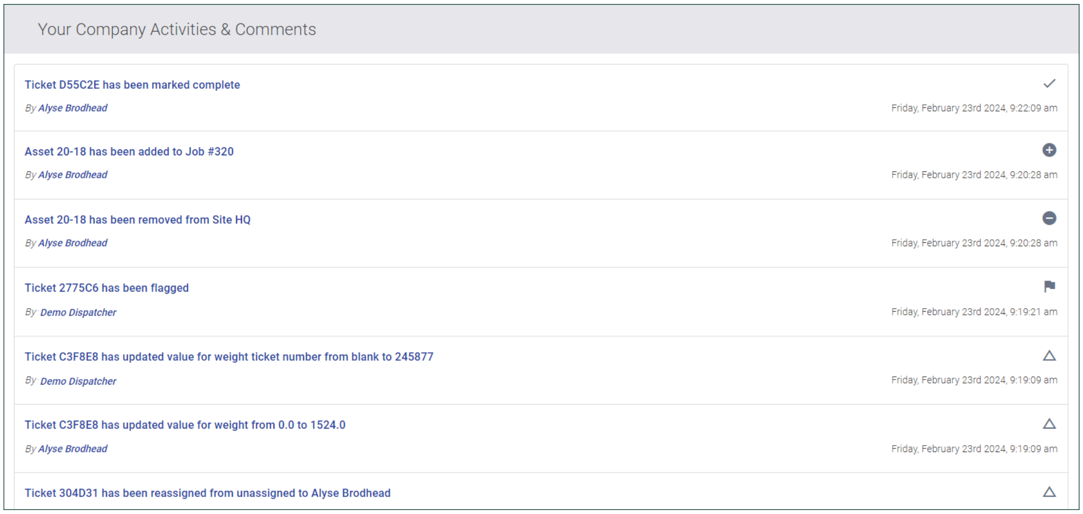
At the bottom of the page is a running log of activities and comments to track what actions are being taken, when, and by who.

1. Click **Home**



2. Click **Show Activities**

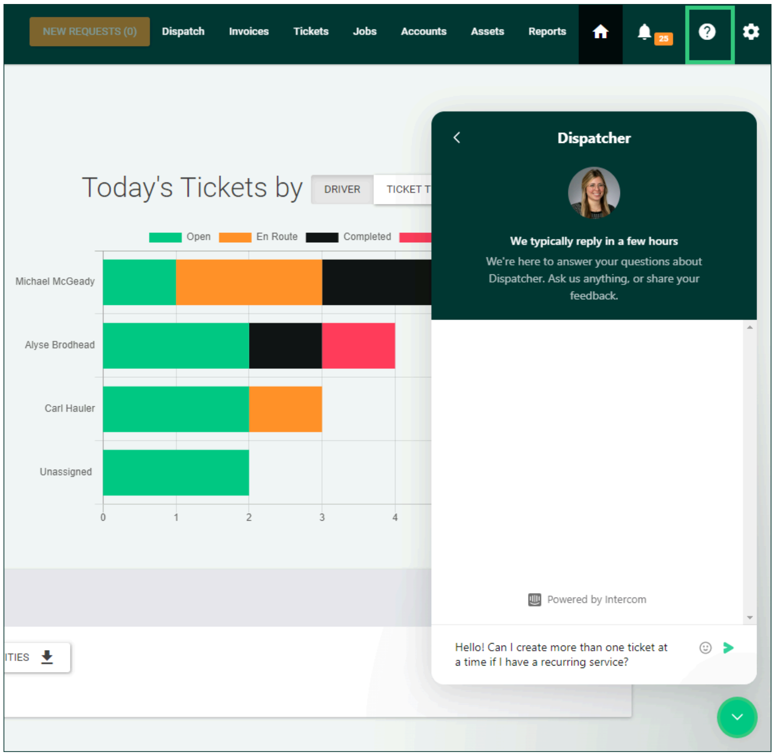




Customer and Tech Support

If you have a question, need support, or have any feedback, click the message icon in the bottom right corner to chat with a member of our client support team.

1. Click the **Message Icon**
2. Click Send us a message to write in a new comment
3. Click **Messages** to view previous conversations



Account Settings

Access account settings by clicking the gear icon in the top right to edit:

- **Company Settings**: name, address, phone number
  - Required Actions: actions drivers need to do to complete a ticket
  - Driver Assignment: which users should appear in the Driver List Options
  - Billing and Invoice Settings: multiple settings and message templates
- Company Team: creating or deactivating user profiles
- Ticket Types: categories of actions taken on your assets, such as deliveries, swaps, and pickups
- Asset Types: names used to categorize your assets, such as 10 Yard, 20 Yard, etc.
- Site Types: category names used to group all of your sites, such as landfills and storage yards
- Sites: specific locations drivers visit everyday
- Fee Types & Descriptions: line items you typically invoice, including the dollar amount and associated notes to provide clarity

Discover more about these features in the Account Setup section of this manual.

Users assigned an Admin role can access and edit account settings.

Account Setup

Company Team

Manage user profiles from the Company Team page, where you can create, deactivate, and reactivate profiles. There are two roles a user can be within Dispatcher:

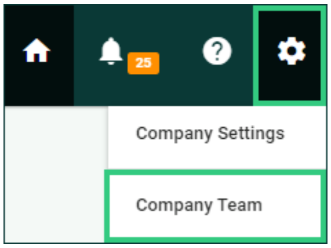
- Administrator
- Driver

Role Permissions	Access features from the Dispatcher.com Mobile App	Access features from the Dispatcher.com web browser App	Access and Edit Account Settings	Create, edit, assign and all Drivers' Tickets	View and edit Tickets assigned to self
Admin	☑	☑	☑	☑	☑
Driver	☑	☐	☐	☐	☑

How to Create a New User

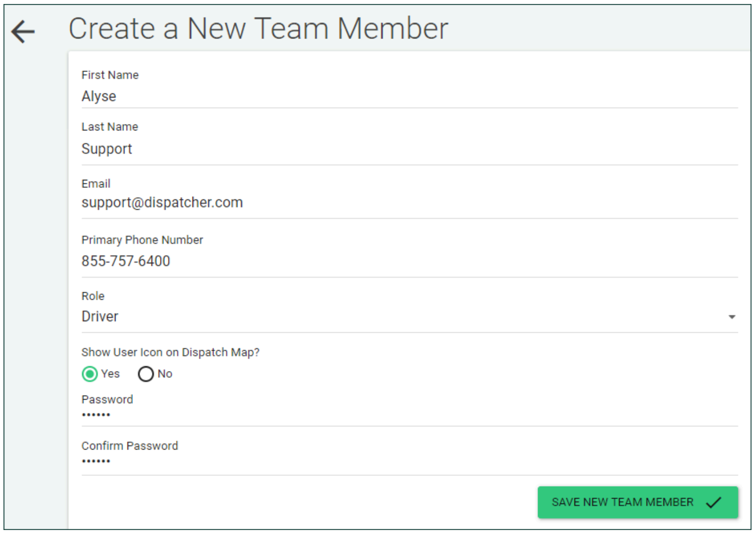
If the profile for a prior team member already exists, refer to the instructions on reactivating a user before creating a new profile. You cannot use the same email address for multiple users, as the email address serves as their unique username and is used to reset passwords.

1. Click **Settings**
2. Click **Company Team**



3. Click **Add Team Member**

4. Fill out the appropriate details



5. Click **Save New Team Member**

Send the password you created to the new user. Their email is their username.

Direct drivers to download the Dispatcher.com Mobile App on their device. Driver Training Resources: [Dispatcher Video - New Driver Overview]() and [Quick Start Guide for Drivers]().

💡**Dispatcher Tip:** Download the Dispatcher.com Mobile App on your own device, create a test account, and test tickets to gain a driver's perspective. This will help determine how to best utilize each field and feature to suit your team's needs.

How to Deactivate a User

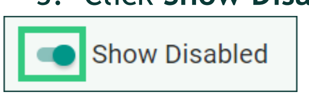
Deactivating a user will remove their access from Dispatcher. All active tickets assigned to the profile must be closed or reassigned prior to deactivation.

1. Click **Settings**
2. Click **Company Team**
3. Click the appropriate **user's profile**
4. Click **Deactivate User**

How to Reactivate a User

Use this feature to restore all information associated with a former teammate. Since an email address serves as a unique username and is used to reset passwords, you cannot use the same email address for multiple users. Therefore, it's important to reactivate profiles rather than create new ones.

1. Click **Settings**
2. Click **Company Team**
3. Click **Show Disabled**

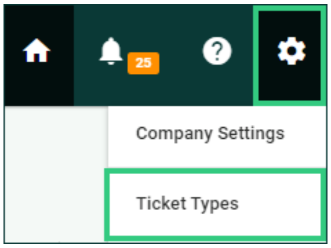


4. Click the appropriate **user's profile**
5. Click **Activate User**

Create Ticket Types

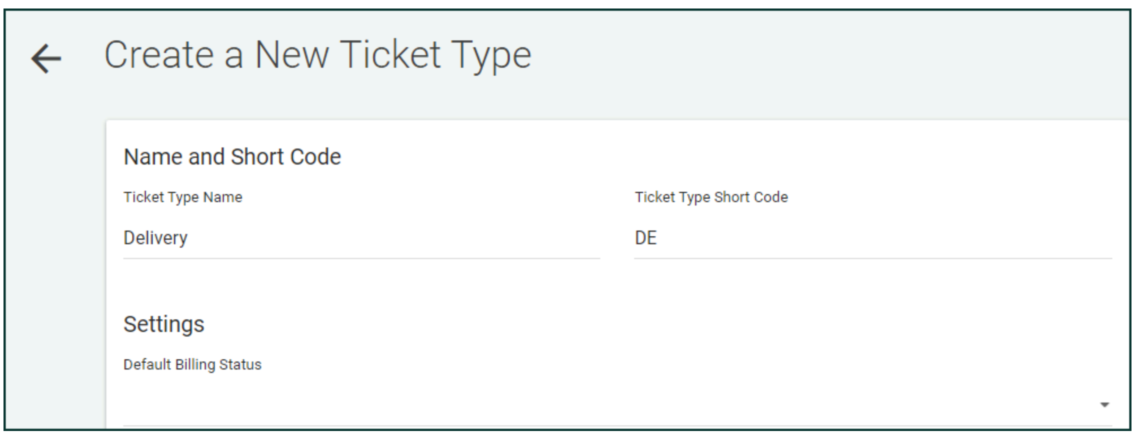
Ticket Types are the categories of action taken on your assets. For example: Delivery, Empty & Return, or Final Removal. Add and edit Ticket Types as needed to understand the type of services.

1. Click **Settings**
2. Click **Ticket Types**

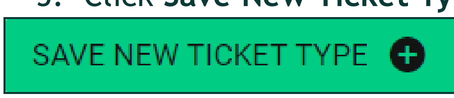


3. Click **New Ticket Type**

4. Fill out the appropriate details
    - **Name**: type of action or service taken on your asset
    - **Short Code**: displayed on the map and other areas where full name is too long
    - **Default Billing Status** (optional): only set to automatically default a billing status per ticket type if the type will always be Invoiced, Paid, or Not Billable. For example, if there is a service that does not accrue a charge, select Not Billable



5. Click **Save New Ticket Type**

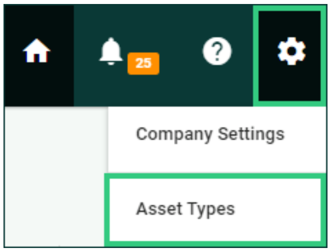


💡**Dispatcher Tip:** You can create as many Ticket Types as needed for your company so use them as needed to communicate effectively with your drivers and admins. Feel free to be creative and add emojis or use Ticket Types as helpful reminders. For example, a "Schedule Pickup 📞" Ticket Type can serve as a reminder for you or your team on applicable days.

Create Asset Types

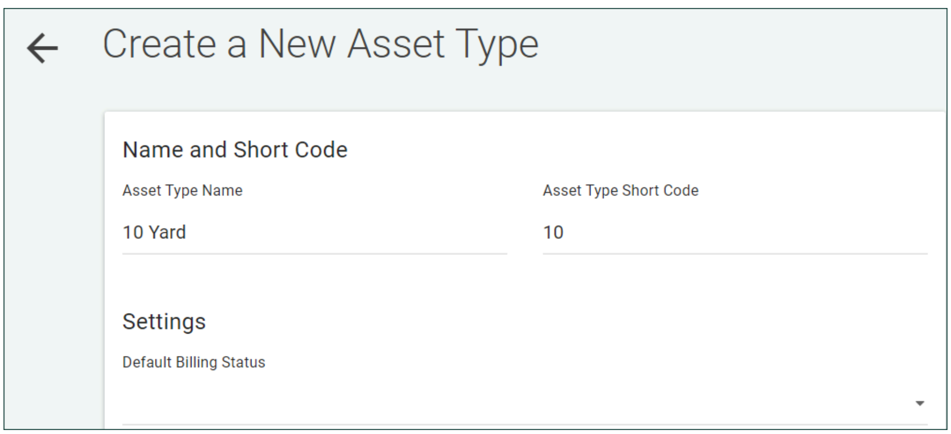
Asset Types are the names used to categorize assets, or types of bins available. For example: 10 Yard Dumpster, 20 Yard Dumpster, or 30 Yard Dumpster.

1. Click **Settings**
2. Click **Asset Types**

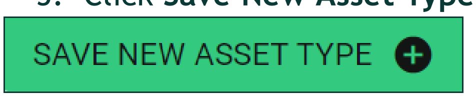


3. Click **New Asset Type**

4. Fill out the appropriate details
   - **Name:** typically the size or type of container being transported
   - **Short Code:** displayed on the map and other areas where full name is too long
   - **Default Billing Status** (optional): only set to automatically default a billing status per asset type if the type will always be Invoiced, Paid, or Not Billable. For example, if there is a container that does not accrue a charge, select Not Billable



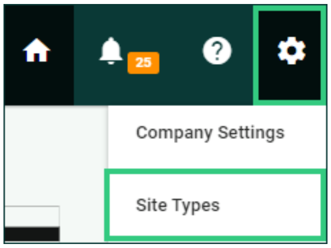
5. Click **Save New Asset Type**



Create Site Types

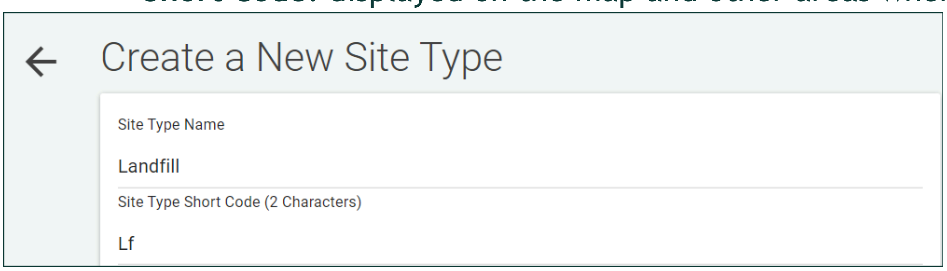
Site Types are the category names used to group all of your sites, or locations visited by your drivers. For example: Landfills, Container Yards, or Repair Shops. Adding Site Types is a critical first step to adding Sites, which allow you to direct Drivers to the right stops, report on weight totals at each location, and accurately report on where Assets are located.

1. Click **Settings**
2. Click **Site Types**

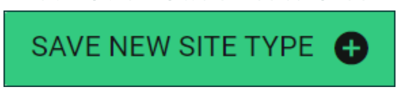


3. Click **New Site Type**

4. Fill out the appropriate details
    - **Name:** the category name of the type of locations drivers visit everyday
    - **Short Code:** displayed on the map and other areas where full name is too long



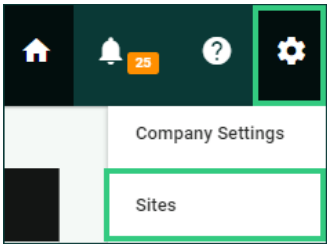
5. Click **Save New Site Type**



Create Sites

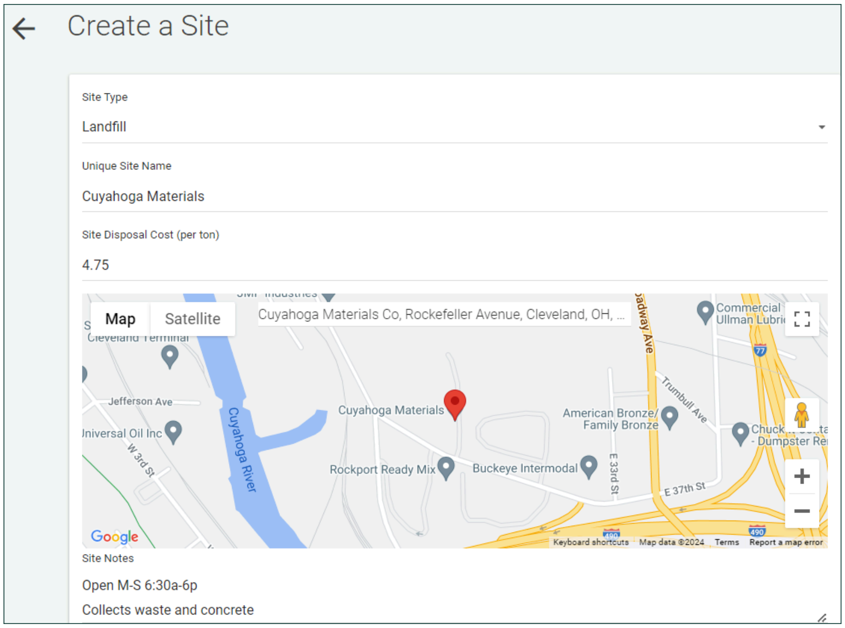
Sites are specific addresses drivers visit everyday that are not a job address like your local transfer stations or landfills.

1. Click **Settings**
2. Click **Sites**



3. Click **New Site +**

4. Fill out the appropriate details
   - **Site Type**: the category name of the type of locations drivers visit everyday
   - **Name**: displayed on the map and other areas where full name is too long
   - **Disposal Cost (per ton)**: amount of money per ton it costs to unload at a site, only visible to admin users
   - **Location**: Click the Google populated address to pinpoint location on the map
   - **Notes** (optional): Share Site details such as operating hours or debris material criteria, visible to both admin and driver users



5. Click **Save New Site**

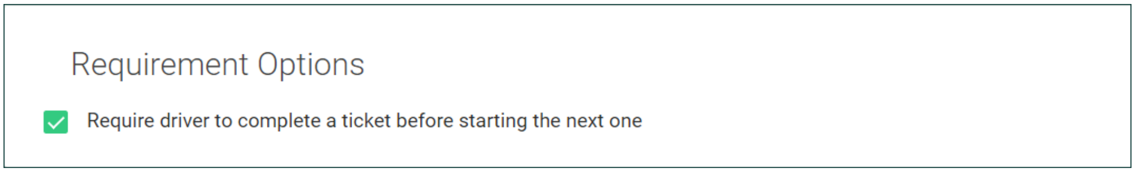
Disposal Costs: Add your costs and view them throughout Dispatcher to help you and your administrators make the most informed decisions.

Set Required Actions

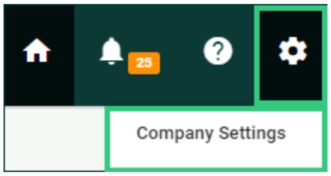
Determine the actions drivers need to complete before completing Tickets to more accurately manage inventory and ensure the right information is added to each Ticket.

Requirement Options

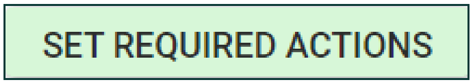
Requiring drivers to complete one Ticket before starting the next ensures all tasks and requirements are met before moving to another Ticket.



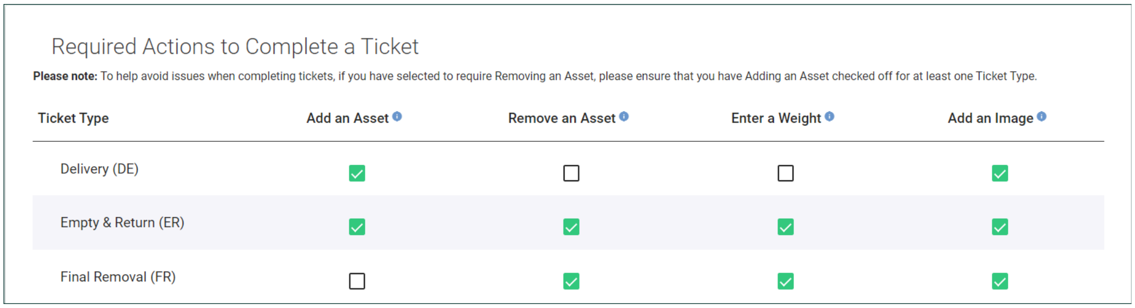
1. Click **Settings**
2. Click **Company Settings**



3. Click **Set Required Actions**



4. **Check** the actions you'd like to require per each Ticket Type

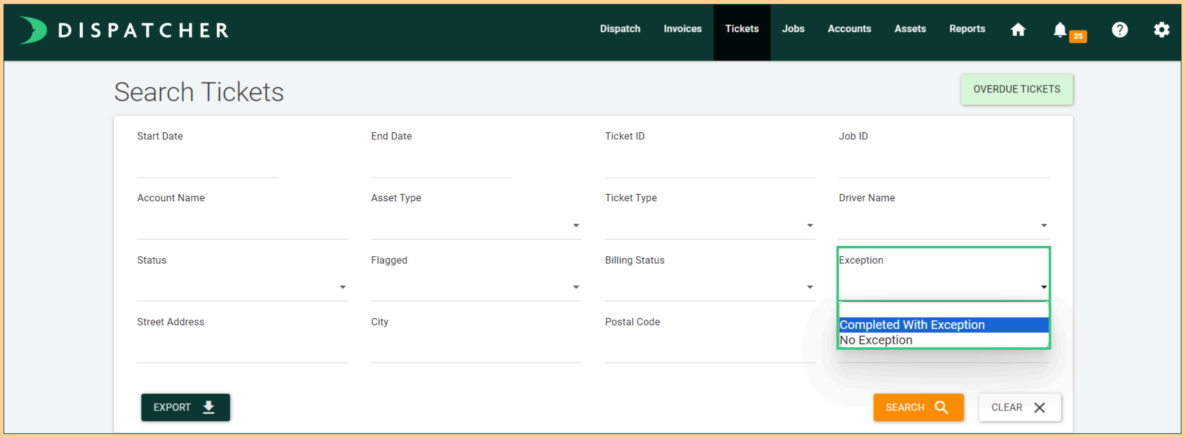


Required Actions to Complete a Ticket

Please note: To help avoid issues when completing tickets, if you have selected to require Removing an Asset, please ensure that you have Adding an Asset checked off for at least one Ticket Type.

Ticket Type	Add an Asset	Remove an Asset	Enter a Weight	Add an Image
Delivery (DE)	☑	☐	☐	☑
Empty & Return (ER)	☑	☑	☑	☑
Final Removal (FR)	☐	☑	☑	☑

Complete with Exception: If a driver is unable to fulfill a required action, they have the option to Complete Ticket With Exception, where they must provide a reason for not completing the required details. Administrators can then track and review exception notes.



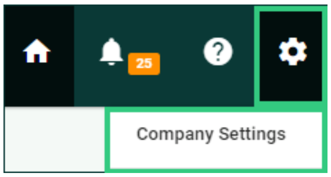
Select Default Weight Unit

Utilize our unit of measurement settings to ensure your team accurately tracks weights, reports data, and charges fees accordingly.

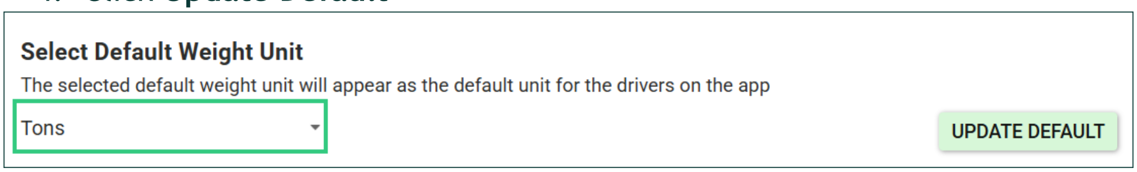
By selecting a default unit of measurement, all Tickets will automatically display in this weight unit. Admin users can update the unit and view conversions on individual Tickets. Drivers can select the weight unit they are recording when entering weight in the Dispatcher.com Mobile App.

Set your default unit of measurement under Company Settings.

1. Click **Settings**
2. Click **Company Settings**



3. **Select Default Weight Unit**
4. Click **Update Default**

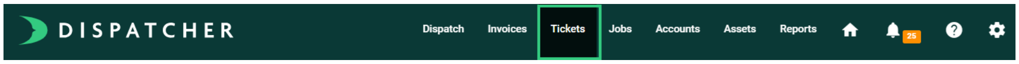


Users can choose to view weight in Pounds, Tons, or Cubic Yards. Canadian users can also select Kilograms or Metric Tons.

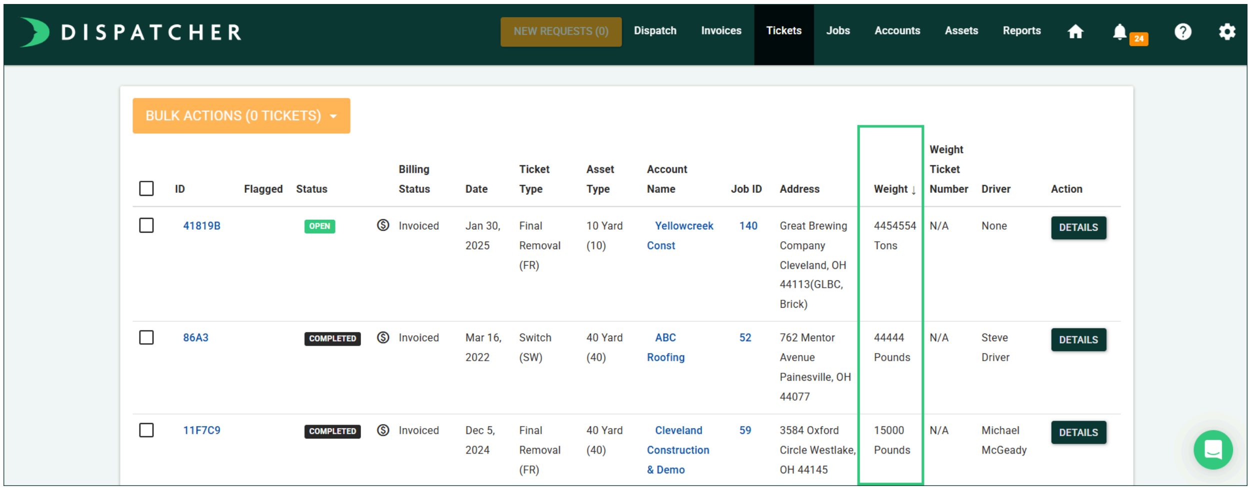
Note: If Cubic Yards is entered, other values will not be displayed as there is no conversion. Tons will be displayed as Imperial Tons (T) and metric tons (t).

View and Update Weight for Individual Tickets.

1. Click **Tickets**



2. View **Weight** as entered by the Driver for the appropriate Ticket

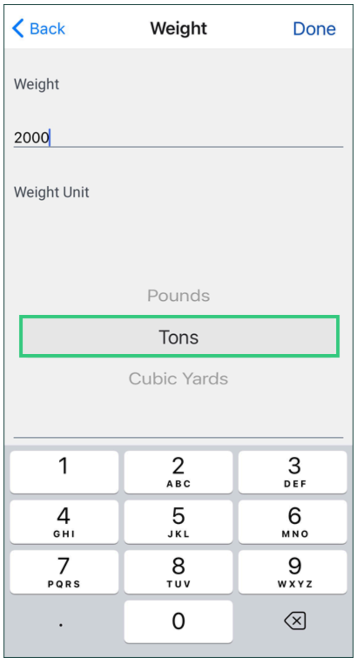


3. **Search** for the appropriate Ticket
4. Click the **Ticket ID**

	ID	Flagged	Status	Billing Status	Date ↓	Ticket Type	Asset Type	Account Name	Job ID	Address	Weight	Weight Ticket Number	Driver	Action
☐	D1B000		OPEN	Pending	Apr 17, 2024	Switch (SW)	10 Yard (10)	Yellowcreek Const	323	48 Prescott Drive Hudson, OH 44236	N/A	N/A	None	DETAILS

5. Click Edit Ticket to update Weight Unit

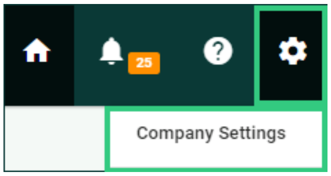
Drivers can select the Weight Unit type in the Dispatcher.com Mobile App to match the unit provided by the disposal facility when adding weight to a Ticket.



Enable Customer SMS

In today's world, exceptional communication is expected. This feature ensures you not only meet but exceed those expectations, streamlining operations and boosting customer satisfaction. Customers will be automatically notified when a service is scheduled, started, and completed—keeping them in the loop every step of the way.

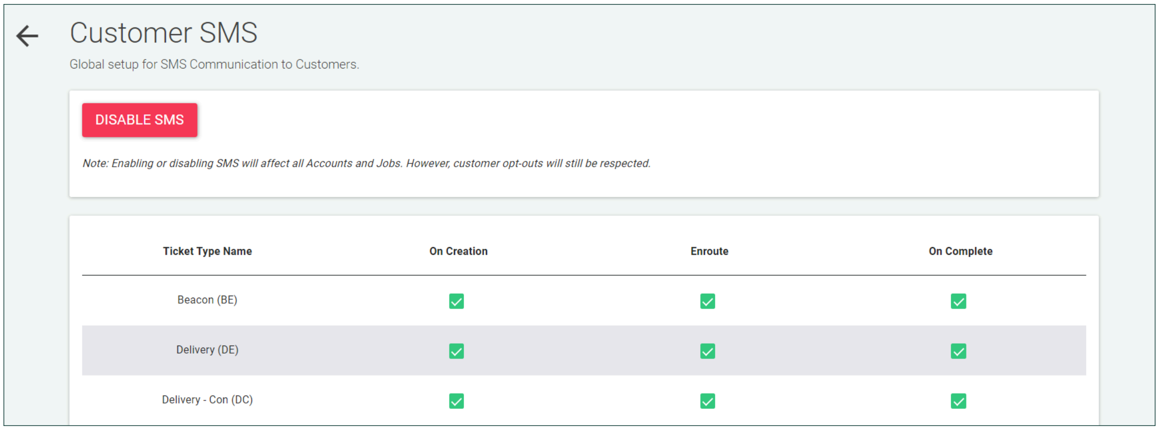
1. 1. Click **Settings**
2. Click **Company Settings**



3. Click **SMS Settings**

4. Click **Enable SMS**

5. Check the appropriate message types: **On Creation**, **Enroute**, and **On Complete** to be sent per each Ticket Type



Once enabled, messages will be sent to the primary and secondary contacts of the Job. Customize which Accounts and Jobs receive updates by disabling notifications if needed.

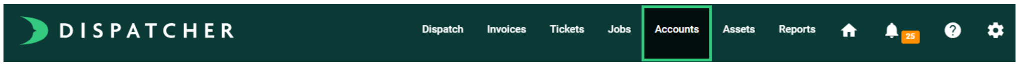
Disable SMS Communication Per Account or Job

1. Click **Accounts or Jobs**
2. **Search** for the appropriate Account or Job
3. Click **Account ID** or **Job ID**
4. Click **Disable SMS**

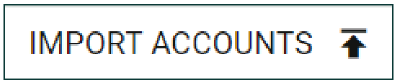
Bulk Import Accounts

Accounts can be added one by one, through Dispatcher's Bulk Import feature, or QuickBooks Online Customer Import. The Bulk Import Feature is a great way to add all of your Customers in Dispatcher in one swoop.

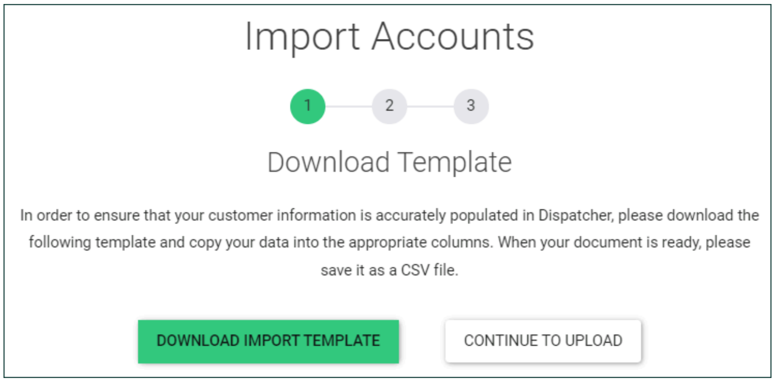
1. Click **Accounts**



2. Click **Import Accounts**

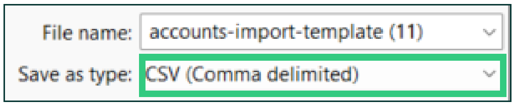


3. Click **Download Import Template** and copy your customer information in the appropriate columns to ensure all the data gets properly entered into Dispatcher



	A	B	C	D	E	F	G	H	I	J	K	L	M
1	Account Name	Contact First Name	Contact Last Name	Contact Email	Contact Phone	Contact Phone Extension	Billing Street Address	Billing Street Address Two	Billing City	Billing State	Billing Postal Code	Billing Details	Account Notes
2	Account Example 123	Jane	Doe	jdoe@example.com	8885551234		123 Main Street		Los Angeles	CA	90210		Terms of Net 30

4. **Save the file as a CSV** (In Excel, click File > Save As > select CSV)



5. Return to Dispatcher and click **Continue to Upload**

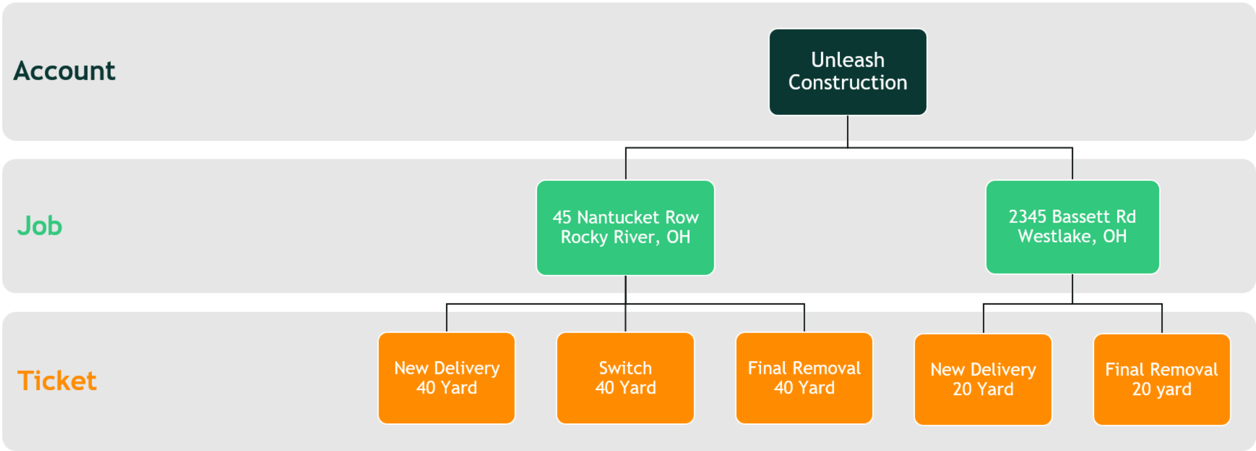
6. **Drag and drop** or **browse** your file
7. Click **Next**

8. Review and confirm that all the Accounts are ready to be imported
9. Click **Confirm and Create Accounts**

Attention QuickBook Online Users: Import your QuickBook Online customers using our QBO import feature. Refer to Import Customer from QuickBooks Online for how-to steps.

Structure of Accounts, Jobs, and Tickets in Dispatcher

To navigate Dispatcher effectively, it's important to understand the hierarchy of Accounts, Jobs, and Tickets. Accounts represent your customers and house all related Jobs. Jobs are the locations you service for these customers. Finally, Tickets are the specific services provided at each location. See definitions and diagram below:



- **Account**: a unique company or customer that you do business with
- **Job**: a unique address or locations where the services will take place
- **Ticket**: the action that takes place on a job

While there are different ways to navigate to the same action in Dispatcher, understanding this structure will help you navigate to the right tabs more efficiently. For example:

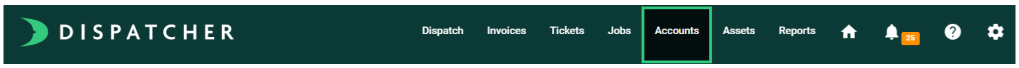
- Go to the Accounts tab if you are looking to create a new Job
- Go to the Jobs tab if you are looking to create a new Ticket

Create a Ticket for a New Account

Step 1: Create New Account

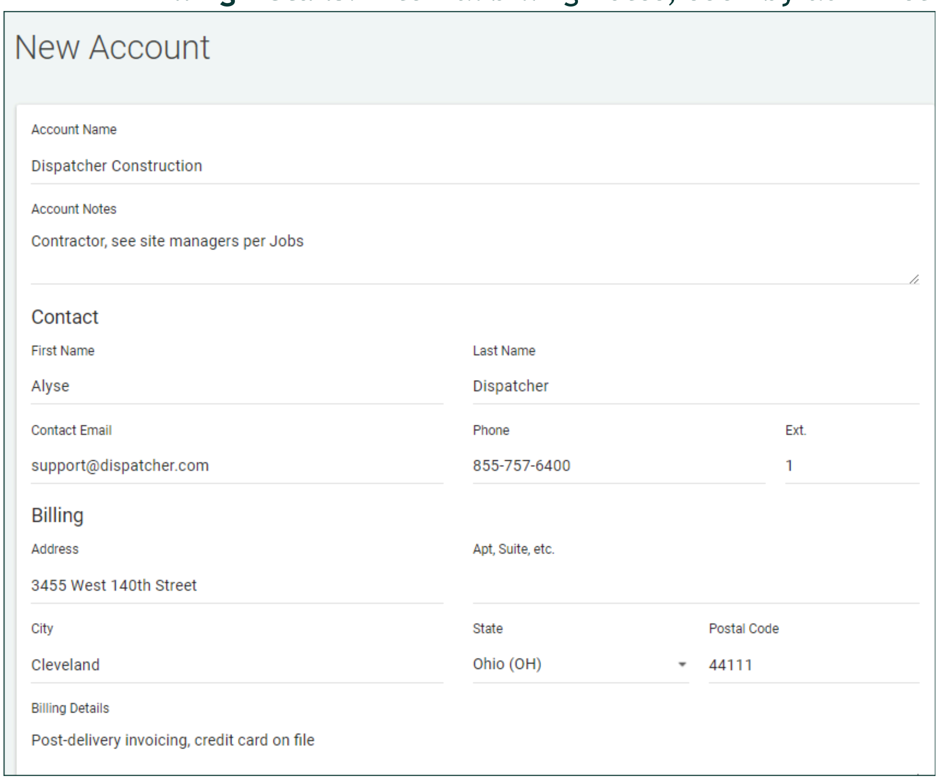
Dispatcher is designed to guide you through each step of Account, Job, and Ticket creation when adding a new Account. This is helpful when a new customer calls in for a service. If the account already exists, refer to Create a Job for an Existing Account or Create Ticket for an Existing Job.

1. Click **Accounts**

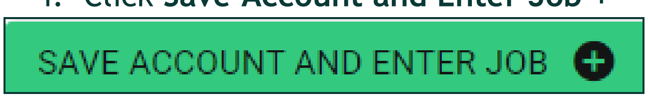


2. Click **New Account**

3. Fill out the appropriate details
   - **Name:** company, contractor, or individual name
   - **Notes:** internal use for account information, seen by administrator users only
   - **Contact information:** account lead's name, email, and phone number
   - **Billing:** company, contractor, or individual address for billing purposes
   - **Billing Details:** internal billing notes, seen by administrator users only



4. Click **Save Account and Enter Job +**



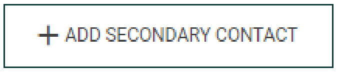
5. Continue to Step 2: Create New Job

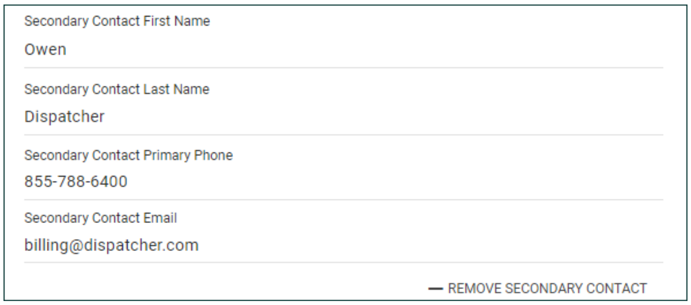
Create a Ticket for a New Account

Step 2: Create New Job

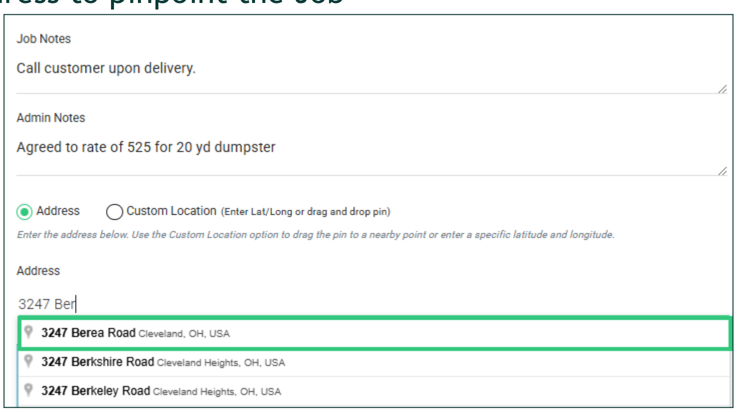
The final step of creating a new Account prompts you to create a new Job. If the account already exists, refer to [Create a Job for an Existing Account]().

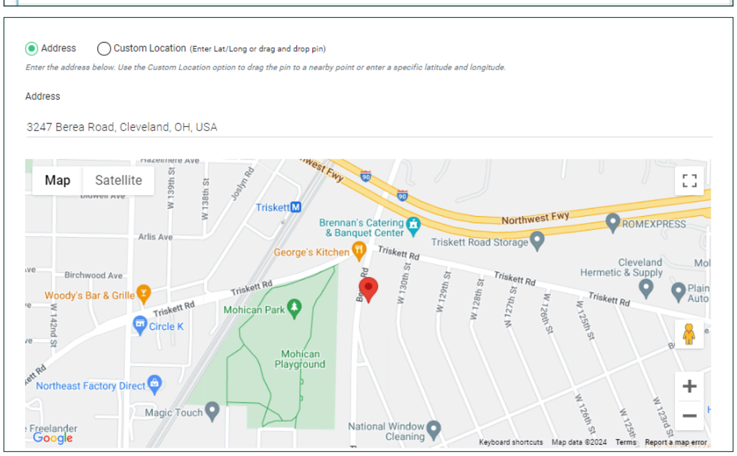
6. Fill out the appropriate details
   - **Add Secondary Contact:** if needed, edit or add additional contact information specific to the Job, separate from the Account's contact information





   - **Job Notes (optional):** can be used for information to the driver pertinent to the entire job. displayed on every ticket created a job. Drivers will see these
   - **Admin Notes (optional):** can be used for private information, such as billing details, and are only visible to Admin users across all Tickets under a Job.
   - **Address:** our map is powered by Google Maps. Select a Google recognized address to pinpoint the Job

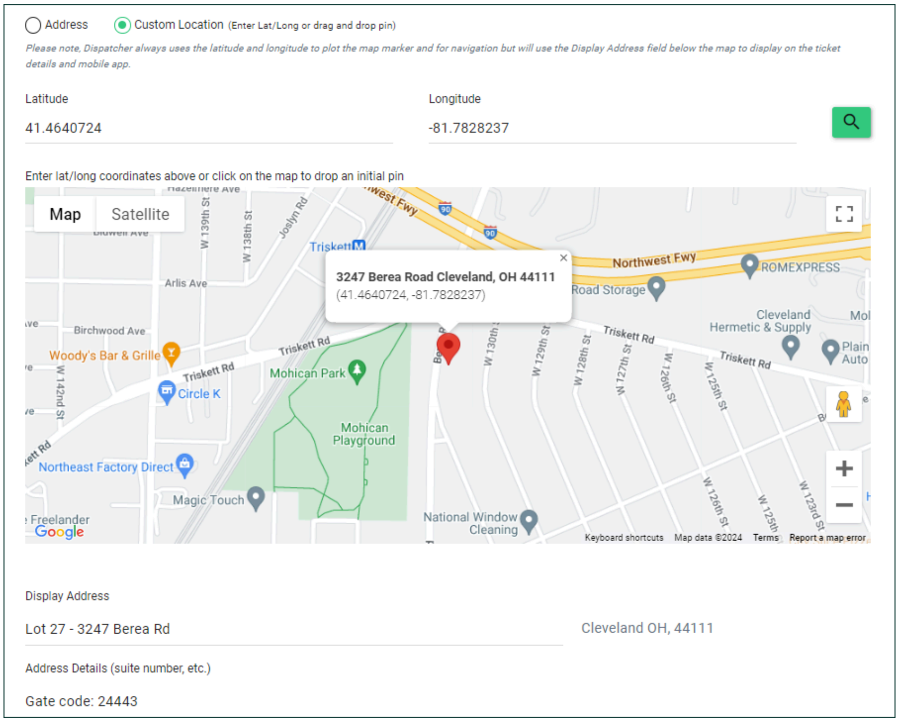




- **Custom Location:** utilize this option when the address is not populating or the job site is different from the geographic location. Enter Latitude and Longitude or drag and drop the red pin to the exact location
- **Display Address:** allows you to update the Job's address name…displayed as the job address throughout Dispatcher and to the drivers. Helpful if jobs sites are referred to as lot numbers instead of addresses or if the address is not yet recognized by Google Maps

💡**Dispatcher Tip:** Click Satellite view to direct drivers to the exact spot to drop the asset. Confirm that the Display Address shows the correct address, or update it to the appropriate number and street name if necessary.

- **Address Details:** displayed next to the job address or display address for additional information, seen both by administrators and drivers. Such as apartment number, name on building, etc.



7. Click **Create Job and Enter Ticket**

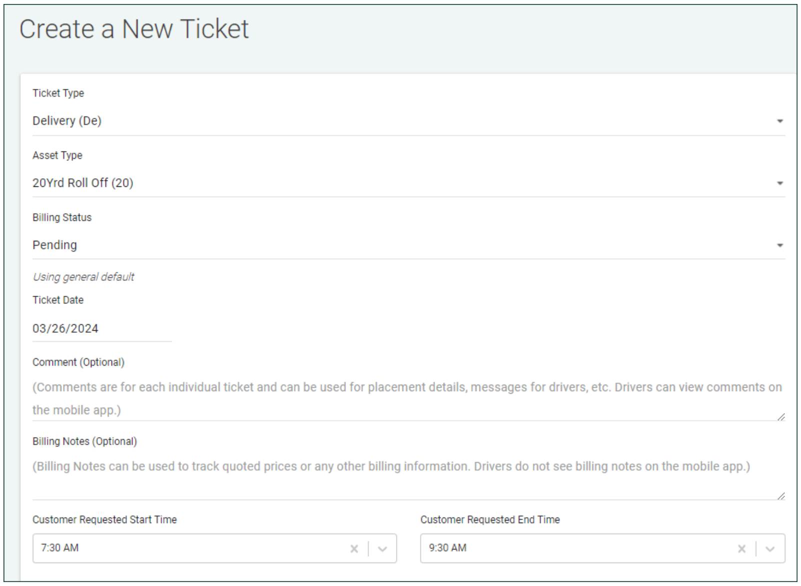
8. Continue to Step 3: Create New Ticket

Create a Ticket for a New Account

Step 3: Create New Ticket

The final step of creating a new Job prompts you to create a new Ticket. If the account and job already exists, refer to Create Ticket for an Existing Job.

9. Fill out the appropriate details
    - **Ticket Type**: type of action to take
    - **Asset Type**: type of container or dumpster to take to Job Site
    - **Billing Status** (optional): select Invoiced, Paid, or Not Billable if applicable
    - **Ticket Date**: date the service will take place
    - **Comment** (optional): use for placement details or messages for drivers. Enter any instructions that are important for the driver to note, e.g., "Please call en route" or "Place in front of the left garage door"
    - **Billing Notes** (optional): used to track quoted prices or any other billing information. Drivers do not see billing notes on the mobile app, these notes are only available to admin users



10. Click **Create Ticket & Add Fees**

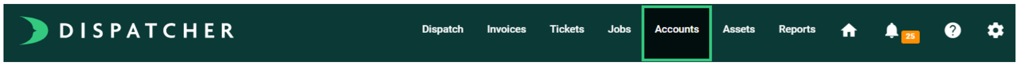
11. Add appropriate fees and **Save Fees**

Dispatcher Billing and Invoicing: Refer to our Billing and Invoicing section to create Fee Types and start utilizing these features.

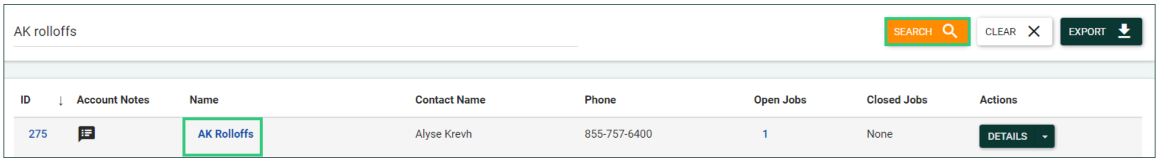
Create a Job for an Existing Account

Creating a Job for an existing Account starts at the Account level, although we recommend heading to the Jobs page first to ensure the Job does not already exist.

1. Click **Accounts**

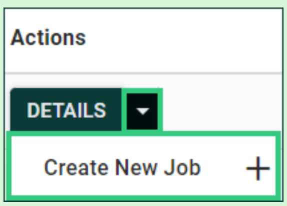


2. **Search** for the appropriate Account
3. Click **Account name**

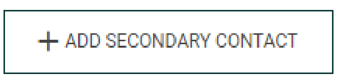


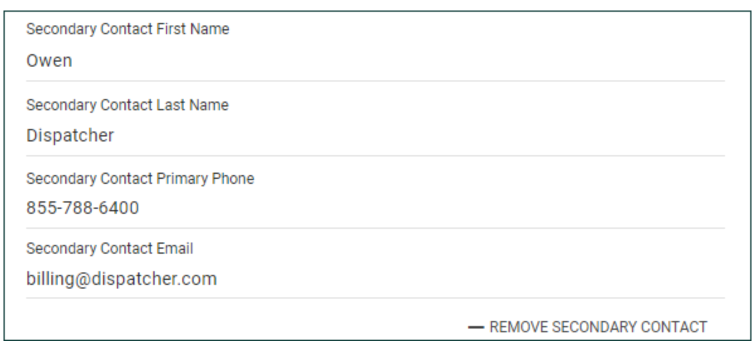
4. Review current **Open Jobs** to ensure the location does not already exist
5. Click Create **New Job +**

💡**Dispatcher Tip:** From the Accounts page, click the Details dropdown arrow to quickly Create New Job + without the extra clicks of going into an Account's details page.

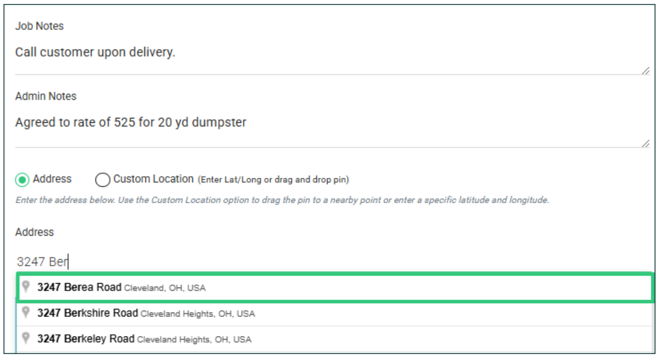


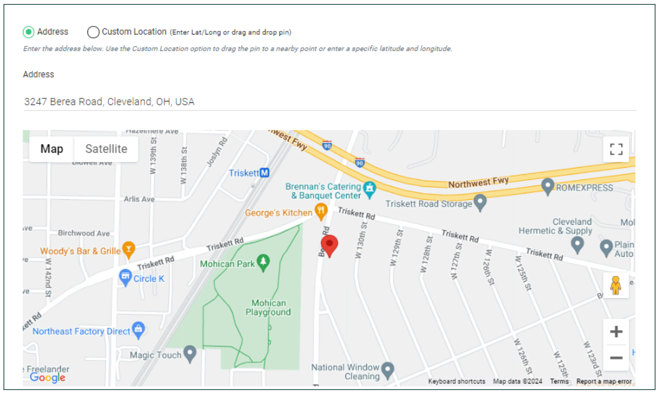
6. Fill out the appropriate details
   - **Add Secondary Contact**: if needed, edit or add additional contact information specific to the Job, separate from the Account's contact information



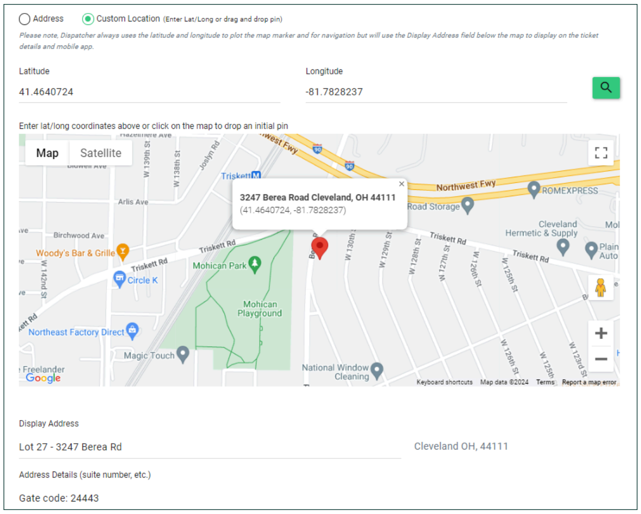


   - **Job Notes** (optional): can be used for information to the driver pertinent to the entire job. displayed on every ticket created a job. Drivers will see these
   - **Admin Notes** (optional): can be used for private information, such as billing details, and are only visible to Admin users across all Tickets under a Job.
   - **Address**: our map is powered by Google Maps. Select a Google recognized address to pinpoint the Job





- **Custom Location:** utilize this option when the address is not populating or the job site is different from the geographic location. Enter Latitude and Longitude or drag and drop the red pin to the exact location
- **Display Address:** allows you to update the Job's address name…displayed as the job address throughout Dispatcher and to the drivers. Helpful if jobs sites are referred to as lot numbers instead of addresses or if the address is not yet recognized by Google Maps
- **Address Details:** displayed next to the job address or display address for additional information, seen both by administrators and drivers. Such as apartment number, name on building, etc.



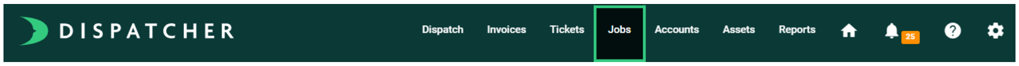
7. Click **Create Job and Enter Ticket**

Create Job: If you're not adding Tickets at this time, click **Create Job**.

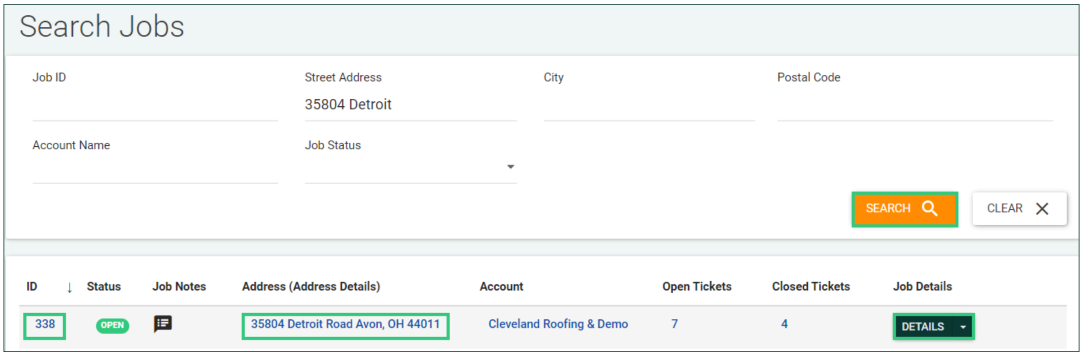
Create Ticket for an Existing Job

Creating a Ticket for an existing Job starts at the Job level.

1. Click **Jobs**

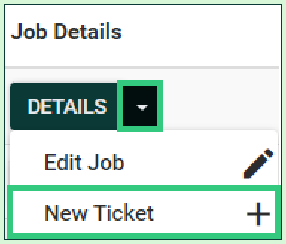


2. **Search** for the Job
3. Click **Job ID** or **Address** or **Details**

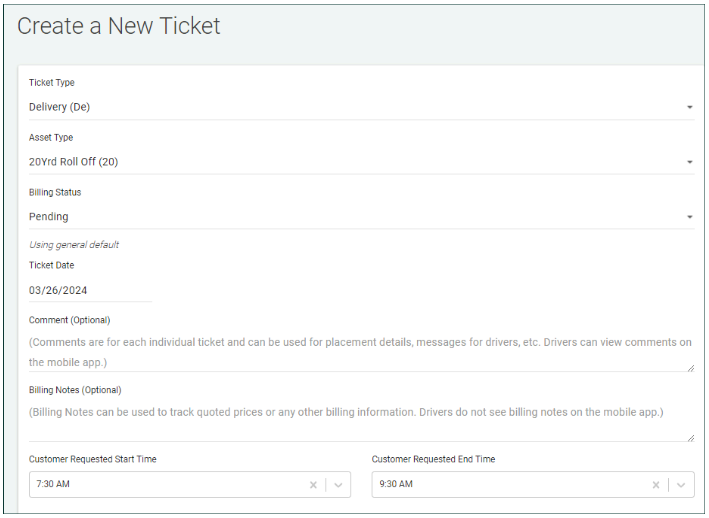


4. Click **Create New Ticket**

💡**Dispatcher Tip:** From the Jobs page, click the Details dropdown arrow to quickly Create New Ticket + without the extra clicks of going into an Job's details page.



5. Fill out the appropriate details
   - **Ticket Type:** type of action to take
   - **Asset Type:** type of bin or dumpster to take to Job Site
   - **Billing Status** (optional): select Invoiced, Paid, or Not Billable if applicable
   - **Ticket Date:** date of service
   - **Comment** (optional): use for placement details or messages for drivers/enter any instructions that are important for the driver to note ie. please call en route or place in front of the left garage door
   - **Billing Notes** (optional): used to track quoted prices or any other billing information. Drivers do not see billing notes on the mobile app



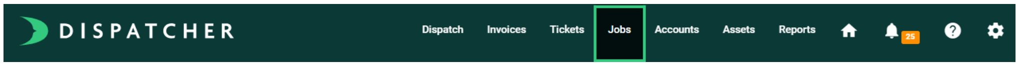
6. Click **Create Ticket & Add Fees**

Bulk Create Tickets: Do you need to create identical services either for the same day or on a recurring basis? Utilize our Bulk Create Tickets feature.

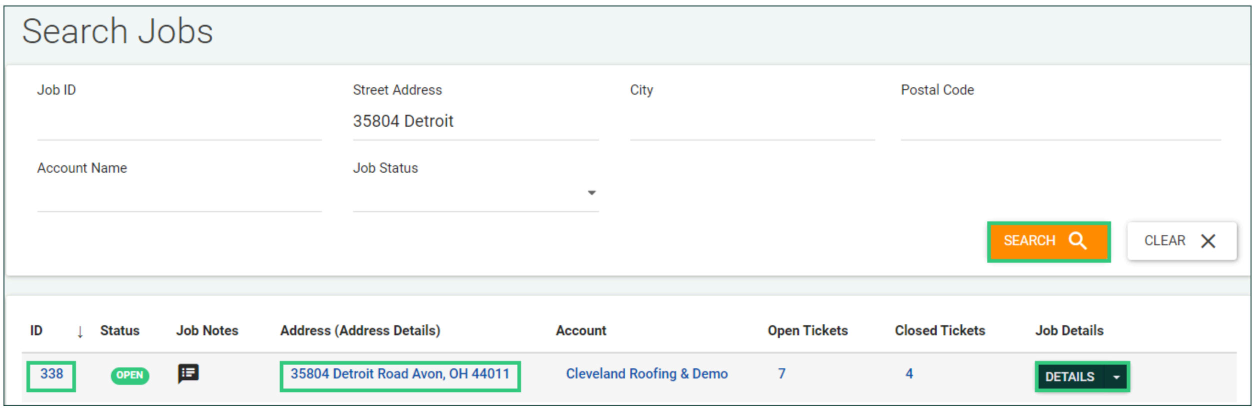
Bulk Create Tickets from an Existing Job

The Bulk Create Tickets feature allows you to create identical services either for the same day or on a recurring basis. Utilize this feature to avoid creating the same Ticket multiple times. Note that bulk-created Tickets' criteria cannot be altered after creation. Please contact support if you have any questions throughout the process.

1. Click **Jobs**

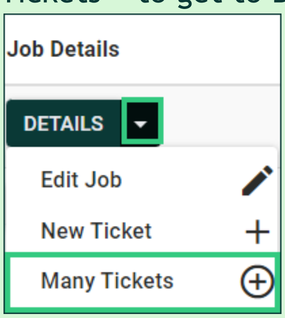


2. **Search** for the Job
3. Click **Job ID** or **Address** or **Details**



4. Click **Bulk Create Tickets +**

💡**Dispatcher Tip:** From the Jobs page, click the Details dropdown arrow and select Many Tickets + to get to Bulk Create Tickets without the extra clicks of going into a Job's details page.



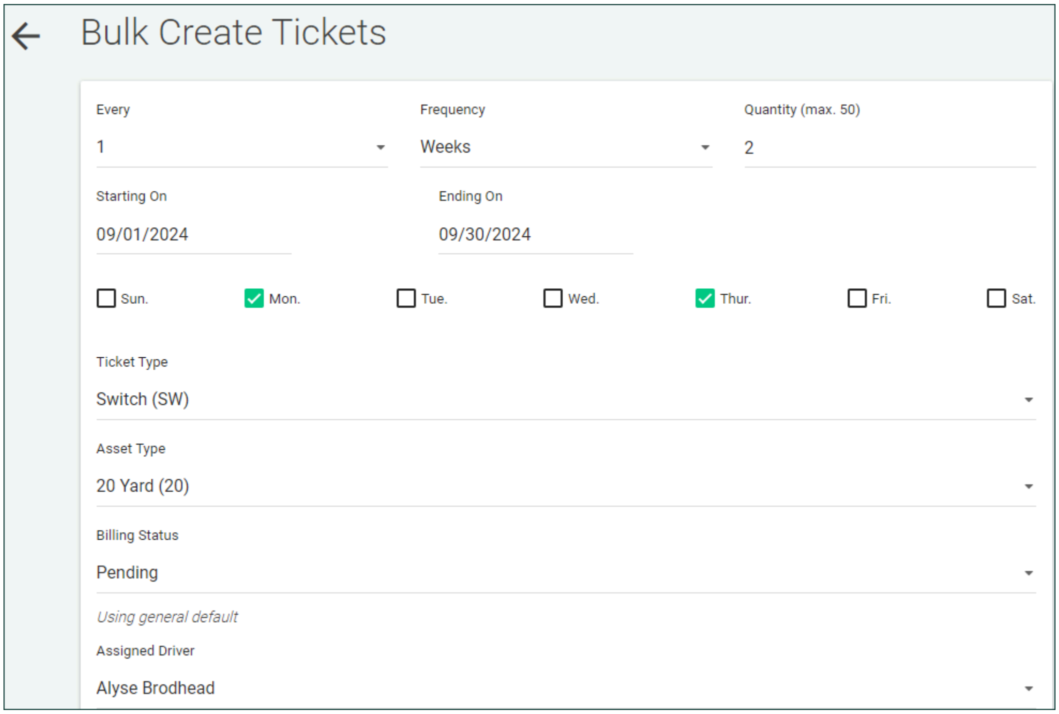
5. Enter **Bulk Create Ticket details**

Every and Frequency determine when the Tickets should be created and Quantity determines the number of Tickets to create.

- **Every**: a numerical value describing the amount of time between frequency
- **Frequency**: unit of time, such as Days, Weeks, Months, or Years
- **Quantity**: a numerical value describing the number of Tickets to be created per the recurring basis
- **Starting/Ending On**: the start and end dates for when the Tickets should be created
- **Billing Status**: select if all services will be Invoiced, Paid, or Not Billable
- **Assigned Driver**: automatically assign one driver to all bulk Tickets created

Example displayed below: “I would like 2 Switch Tickets every Monday and Thursday for the month of September.”

6. Click **Create Tickets**



Please note: It may take time to create multiple Tickets. You will receive a notification when all the tickets have been created or if an error occurs.

💡**Dispatcher Tip:** Add an Assigned Driver to automatically assign all bulk created tickets to them.

Ticket Management

Assign a Driver

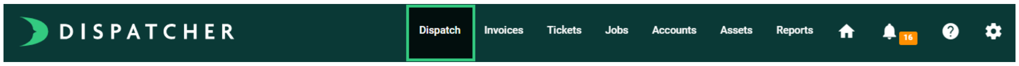
After Tickets are created, assign them to drivers so they appear on their applications. There are three ways to assign drivers:

- From the Dispatch page
- Within a Ticket's details page
- On the Dispatcher.com Mobile App

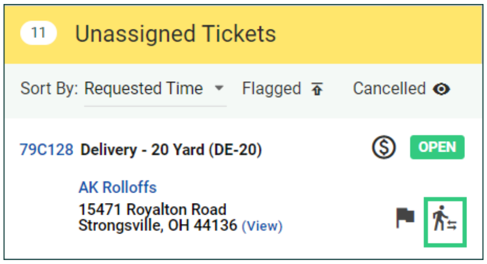
Assign a Driver from the Dispatch Page

All Tickets will appear under Unassigned Tickets. Once Assigned, they will appear under the designated profiles.

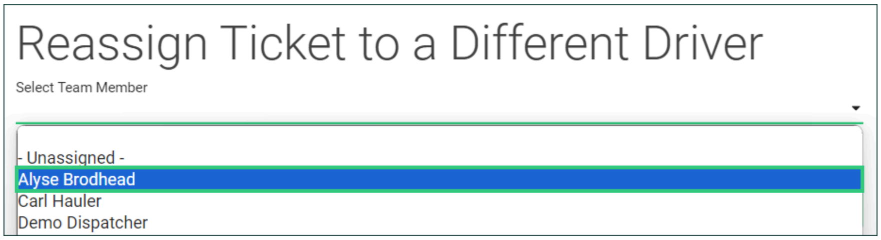
1. Click **Dispatch**



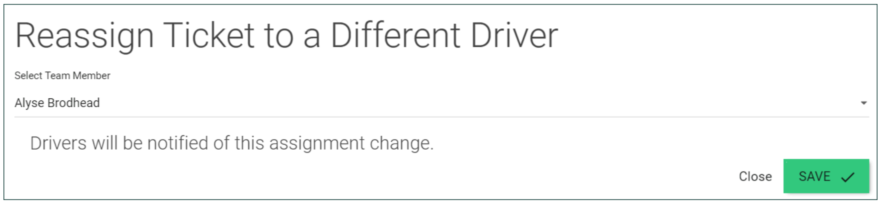
2. Click the **assign driver** icon on the Ticket you want to assign to a driver



3. Select the **Driver**



4. Click **Save**



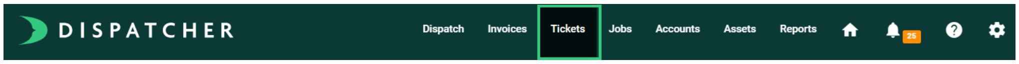
Dispatcher.com Mobile App: Assigning a Ticket to a driver will add the Ticket to the driver's ticket list in the mobile app. To reorder the tickets for a driver, click the two bars on the left of assigned Tickets to drag the Tickets in the appropriate order.

The order will update accordingly and instantly on the driver's app.

Assign a Driver from the Ticket's Details Page

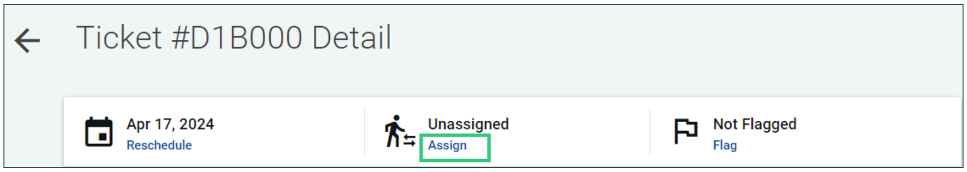
Assign a driver as soon as the Ticket is created on the individual Ticket's page.

6. Click **Tickets**

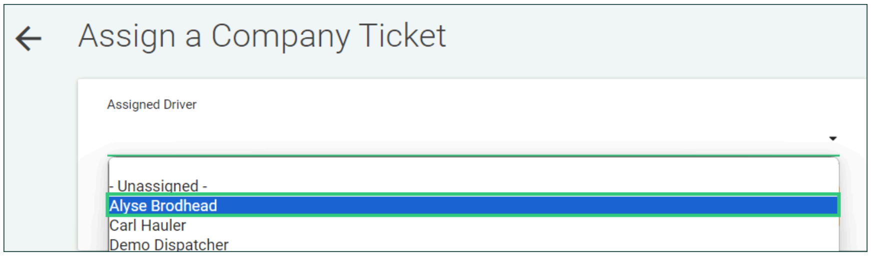


7. **Search** for the appropriate Ticket
8. Click the **Ticket ID**

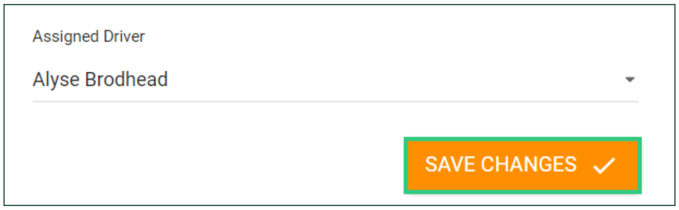
9. Click **Assign**



10. Select the **Driver**



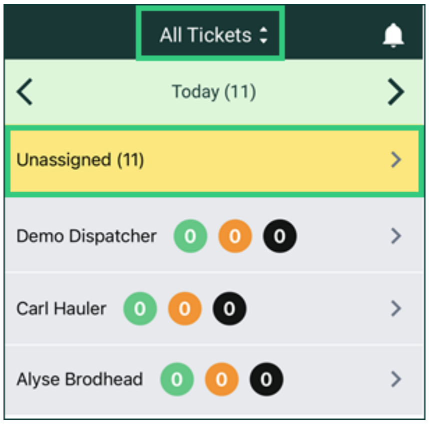
11. Click **Save Changes**



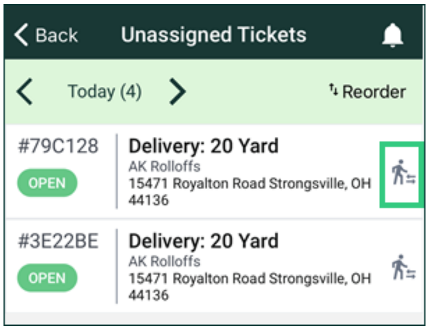
Assign a Driver from the Dispatcher.com Mobile App

Quickly assign drivers on the go through the mobile app. There are limited admin features available through the app. You can also access Dispatcher anytime by going to your mobile browser and visiting app.dispatcher.com.

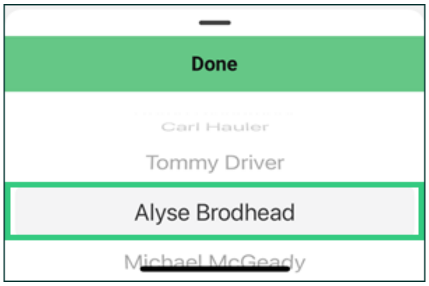
1. Log into **Dispatcher.com Mobile App**
2. Switch your view to **All Tickets**
3. Click **Unassigned**



4. Click the **assign driver** icon on the Ticket you want to assign to a driver



5. Select a **Driver**



6. Click **Done**

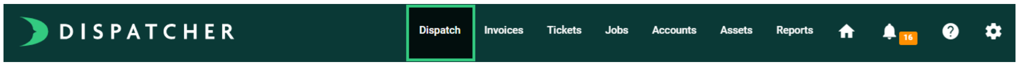
Direct Drivers to Associated Sites

To reorder a driver's Tickets on the Dispatch page, click the two bars to the left of the assigned Tickets and drag them into the desired order. Additionally, attach an Associated Site to each Ticket so drivers know which landfill or storage yard to take the bin to.

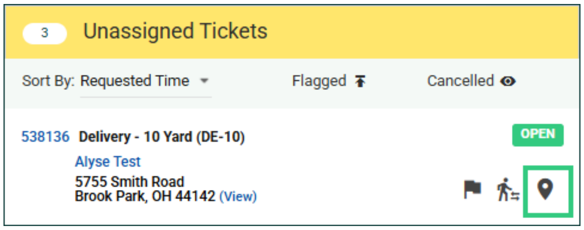
Associated Sites are locations you can add to a ticket to inform the driver of their next stop. This feature also helps with tracking weight and materials. For example, you might add a landfill to indicate where the driver should unload a load.

Add Associated Sites from the Dispatch page.

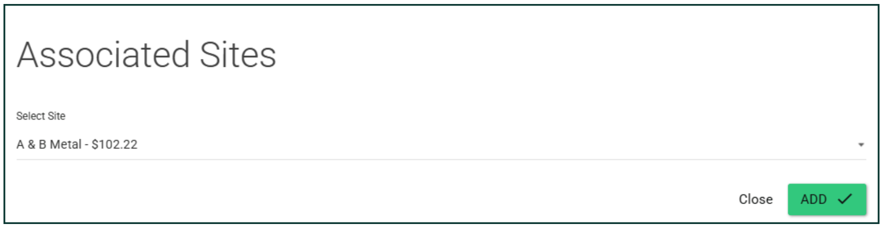
1. Click **Dispatch**



2. Click the **Drop pin** icon on the Ticket you want to add an Associated Site to

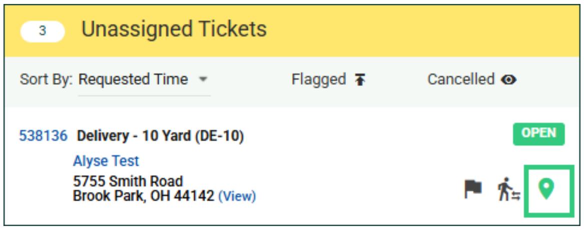


3. Select an Associated Site



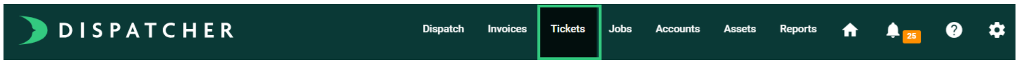
4. Click Add

When a drop pin is green, it indicates the Ticket already has an Associated Site.



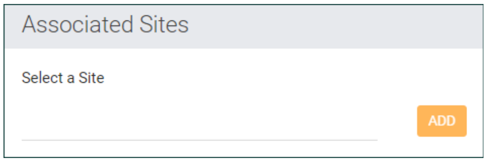
Add Associated Sites from the Ticket Details page.

1. Click **Tickets**

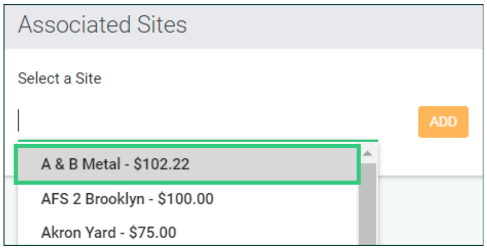


2. **Search** for the appropriate Ticket
3. Click the **Ticket ID**

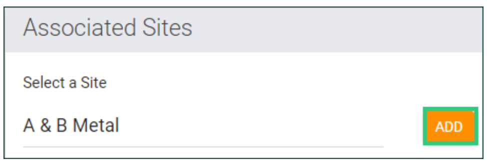
4. Scroll down to **Associated Sites** box



5. Click to **Select a Site**

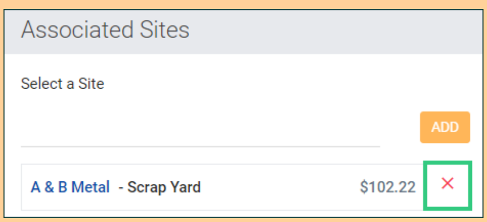


6. Click **Add**



This will add the Associated Site to the driver's ticket view.

Remove Associated Site: If you need to remove an Associated Site, click the X button next to the appropriate Site.



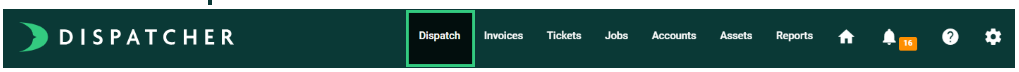
Flag a Ticket

You may choose to flag a ticket if you need to prioritize it in your schedule, if there was an issue, or to indicate something that affects billing like an unaccepted item in a dumpster. There are 3 ways to flag or unflag a ticket:

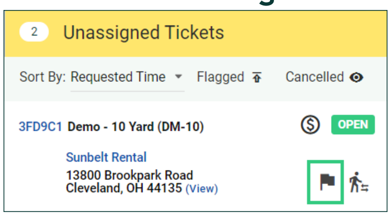
- From the Dispatch page
- Within a Ticket's details page
- On the Dispatcher.com Mobile App

Flag a Ticket from the Dispatch Page

5. Click **Dispatch**

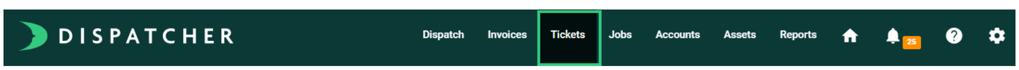


6. Click the **flag** icon on the Ticket you want to flag

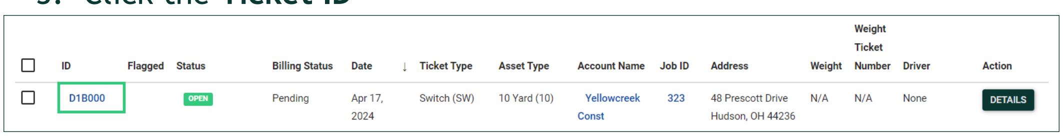


Flag a Ticket from the Ticket's Details Page

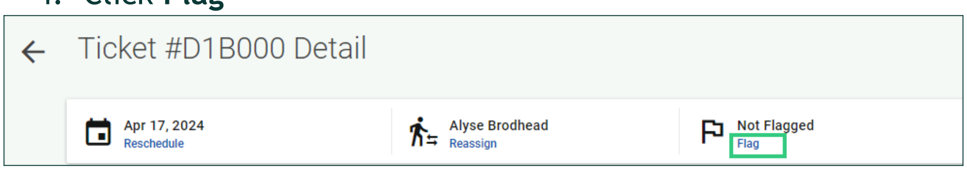
1. Click **Tickets**



2. **Search** for the appropriate Ticket
3. Click the **Ticket ID**

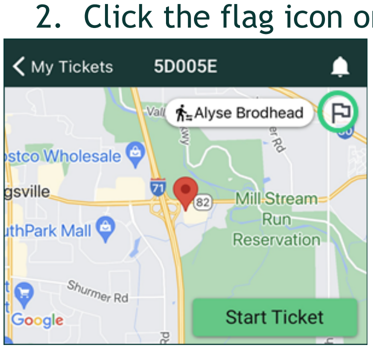


4. Click **Flag**



Flag a Ticket from the Dispatcher.com Mobile App

1. Log into **Dispatcher.com Mobile App**
2. Click the flag icon on the appropriate Ticket

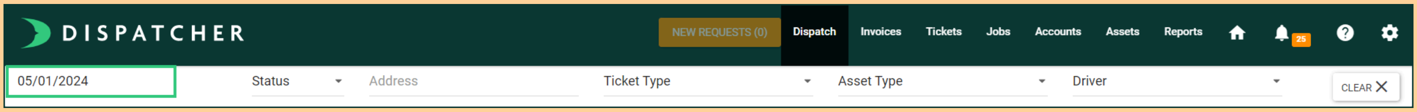


Customize Your Dispatch View

Use the filter at the top of the Dispatch map and in the left sidebar to customize the data displayed.

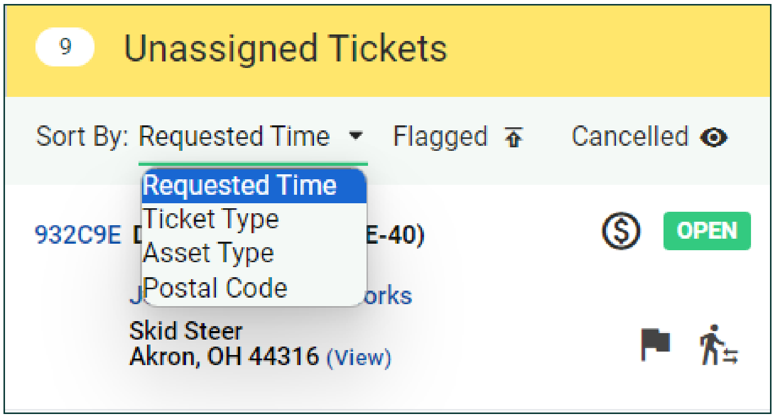
- **Date**: only Tickets scheduled for the selected date will appear on the Dispatch panel and map
- **Status**: according to Ticket progress. View only Open, En Route, Completed, or Canceled Tickets
- **Address**: according to specific location
- **Ticket Type**: according to the type of action being performed
- **Asset Type**: according to the size and type of bin
- **Driver**: according to Tickets assigned to a specific user profile

Dispatch Date: Use the date selector and ticket type filter to look for pickups scheduled in order to know when you may have dumpsters available.



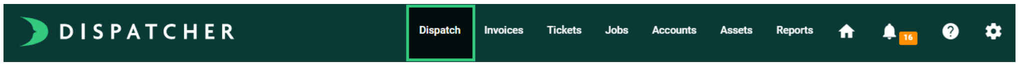
Use the Sort By features to manage the order of Unassigned Tickets

- **Request time**: view all Tickets with Requested Time Ranges at the top of the list
- **Ticket Type**: categorize all Unassigned Tickets by their type of service
- **Asset Type**: categorize all Unassigned Tickets by their type of container
- **Postal Code**: categorize all Unassigned Tickets by postal codes
- **Flagged:** (optional): view all Flagged Tickets at the top of the list
- **Canceled**: view all Canceled Tickets at the top of the list



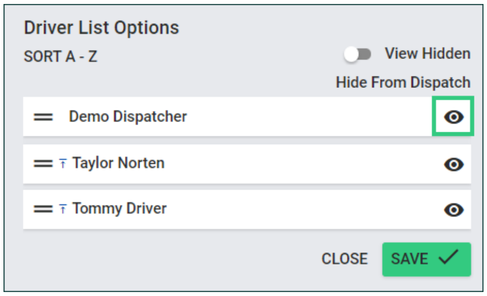
Use the Driver List Options to show/hide drivers and set the order in which they are listed on the left

1. Click **Dispatch**

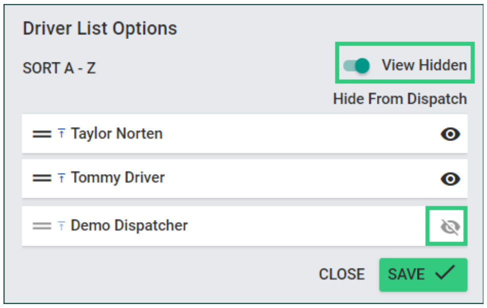


2. Click **Options**

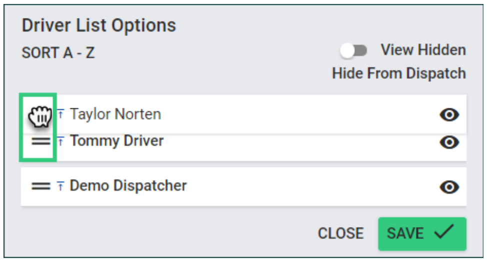
3. Click the **eye icon** to hide a driver profile



4. Click **Unhide** to view and unhide a driver profile



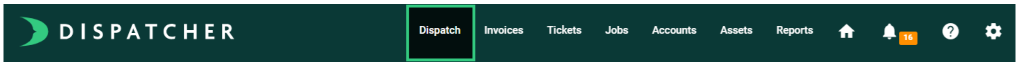
5. Click the **two bars** on the left and drag the drivers in the appropriate order



Track Assets and Sites

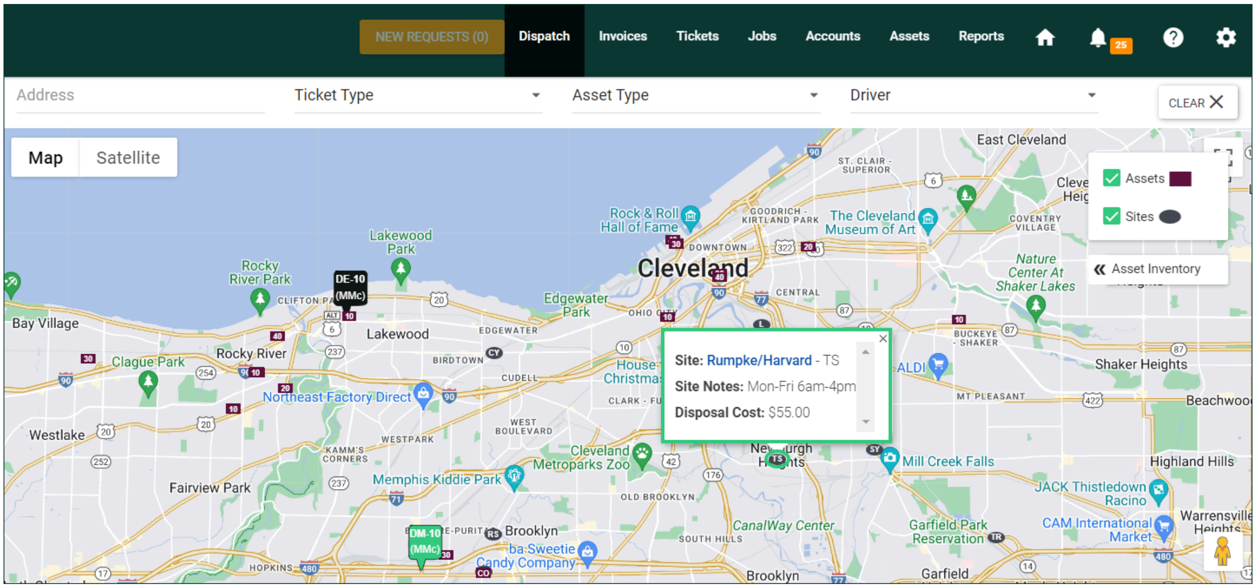
Track Assets and Sites to direct decisions regarding Ticket assignment and where to direct drivers to dump dumpsters.

2. Click **Dispatch**



3. Check **Assets** and/or **Sites** to view them on the map

4. Click on an **Asset** or **Site** to see more details



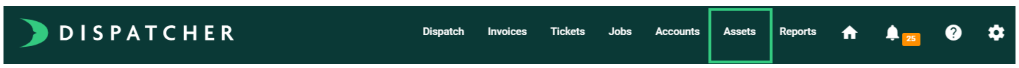
Asset Tracking

Dispatcher inventory management allows you to track the location of your containers, no matter where they are. Asset Locations will naturally update as drivers start Adding and Removing them within the Dispatcher.com Mobile App so don't worry about getting everything perfect in order to get started.

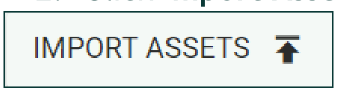
Bulk Import Assets

Before you add your Assets, an individual rentable item that your company owns, [create your Asset Types](). Once Asset Types are added, use the Asset Import Template to bulk import your rentable item numbers.

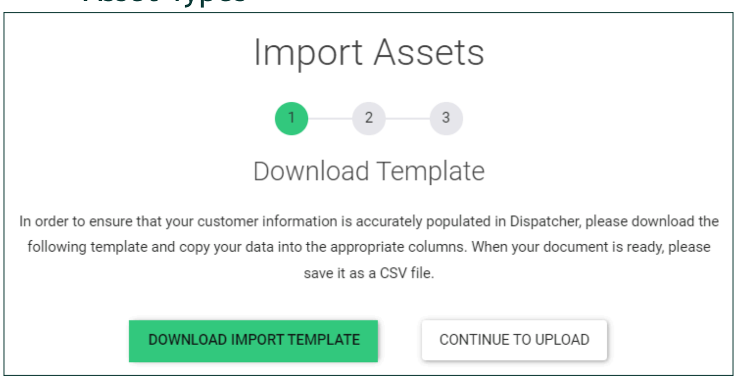
1. Click **Assets**

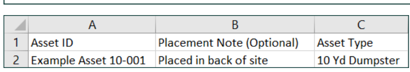


2. Click **Import Assets**



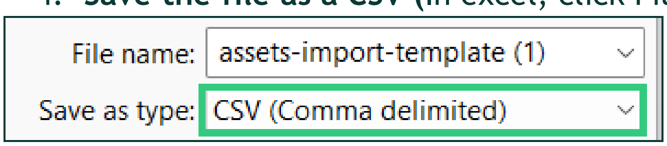
3. Click **Download Import Template** and enter your Asset IDs and corresponding Asset Types





	A	B	C
1	Asset ID	Placement Note (Optional)	Asset Type
2	Example Asset 10-001	Placed in back of site	10 Yd Dumpster

4. **Save the file as a CSV** (In excel, click File > Save As > select CSV)



5. **Upload** the file

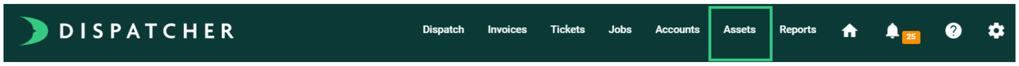
6. **Drag and drop** or **browse** your file
7. Click **Next**

8. Review and confirm that all the Assets are ready to be imported
9. Click **Confirm and Create Assets**

Create an Asset

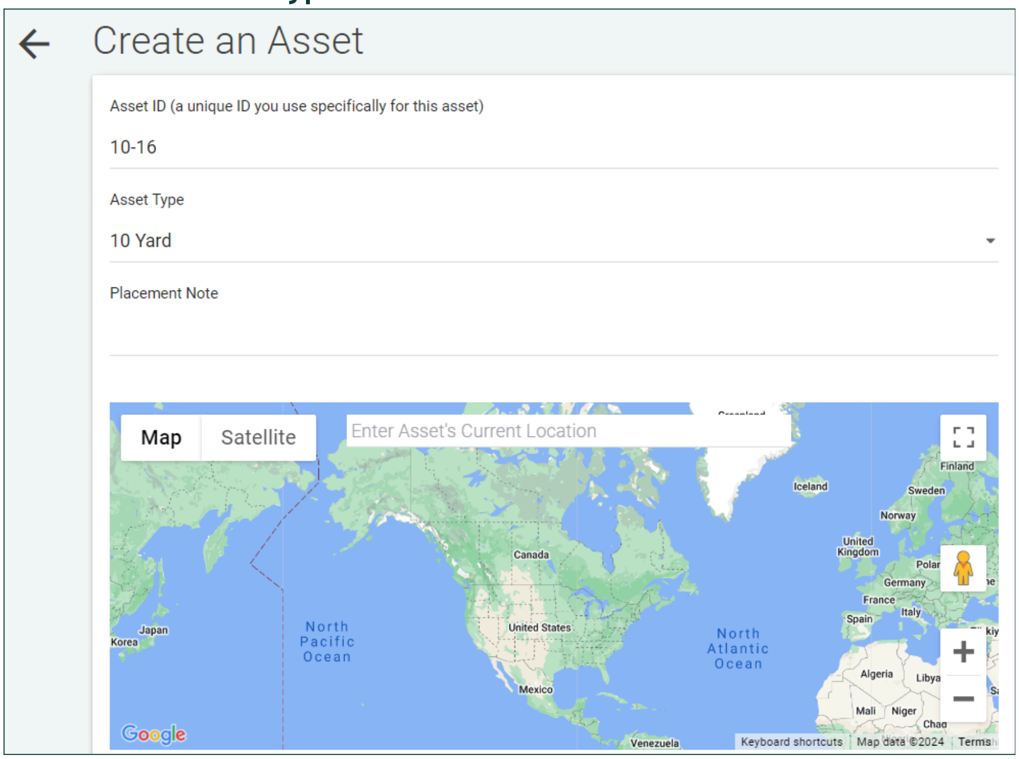
Before you add an Asset, an individual rentable item that your company owns, create your Asset Types. Bulk import your Assets or add one at a time.

1. Click **Assets**

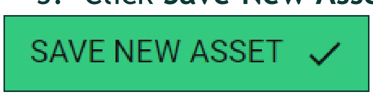


2. Click **New Asset +**

3. Add **Asset ID**
4. Select **Asset Type**



5. Click **Save New Asset**



Asset Numbers: If your physical assets are numbered, it's recommended you use that as the Asset ID. Each asset must be of a specific asset type. For example, "Container - 20 Yard" may be an asset type, and "726" may be the asset ID of a specific 20-yard container

Placement Note: If you have specific notes regarding this asset, use this field to share them amongst your team. For example, share “Do not use - Damaged Door.”

Asset’s Current Location: Encourage your drivers to be responsible for asset locations, as they will naturally start to update as assets are added and removed from jobs. However, if you’d like to manually set your assets’ locations, refer to Set Asset Location in the Web App.

Set Asset Location in the Dispatcher.com Mobile App

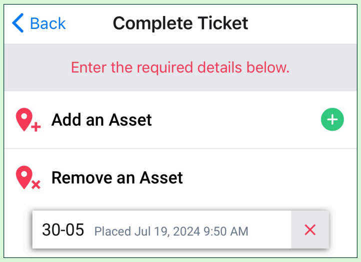
We highly recommend setting [Required Actions] and encouraging your drivers to update asset locations as they are active in the field and interacting with the bins. There are three ways to set the location of an asset:

- Attach it to a Job
- Attach it to a Site
- Manually set the location

Attach an Asset to a Job

1. Tap appropriate **Ticket**
2. Tap **Assets**
3. Tap **Add Asset To Site**
4. Tap appropriate **Asset**
5. Tap **Add**

💡**Dispatcher Tip:** If Required Actions are enabled, direct your drivers to tap **Complete** instead of Assets to assign an asset to the job. A “to-do” list will appear quickly prompting them to add or remove the asset accordingly.



Drivers are prompted to confirm the location they are removing the asset from before adding it to the new location. This helps avoid removing it from an incorrect site or job.

Attach an Asset to a Site

1. Tap **Site**
2. Tap appropriate **Site**
3. Tap **Assets**
4. Tap **Add Asset To Site**
5. Tap appropriate **Asset**
6. Tap **Add**

Manually Set an Asset’s Location

1. Tap **More**
2. Tap **Assets**
3. Search and tap appropriate **Asset**
4. Tap **Change Location**
5. **Set at current location**
6. Tap **Set**

Assets Can Only have One Location: Once an asset is added to a new job, site, or custom location, it is automatically removed from its previous location. You can view asset activities by clicking on Assets, searching for and selecting the appropriate asset ID, and then scrolling down to Asset Activities.

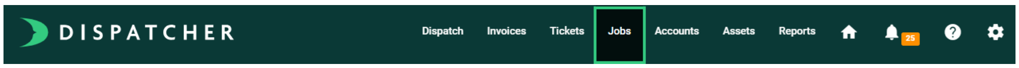
Set Asset Location in the Web App

We highly recommend setting Required Actions and encouraging your drivers to update asset locations as they are active in the field and interacting with the bins. However, we understand that some situations require admins to update an asset location. There are three ways to set the location of an asset:

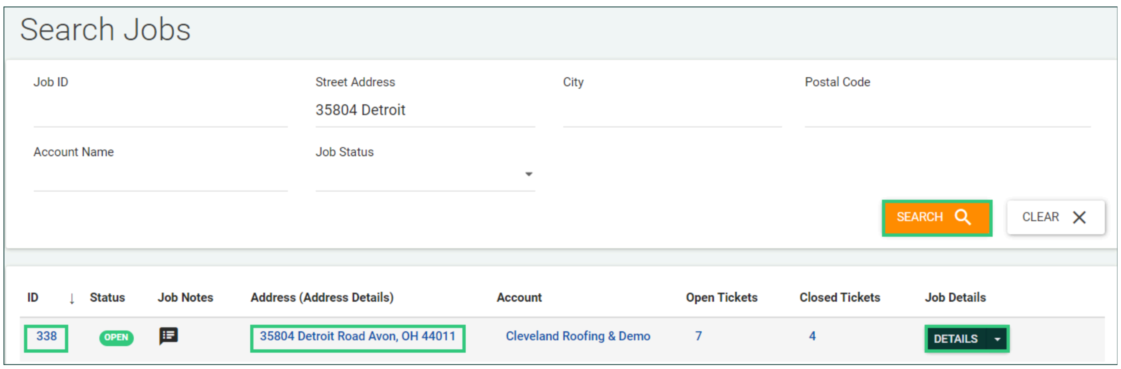
- Attach it to a Job
- Attach it to a Site
- Manually set the location

Attach an Asset to a Job

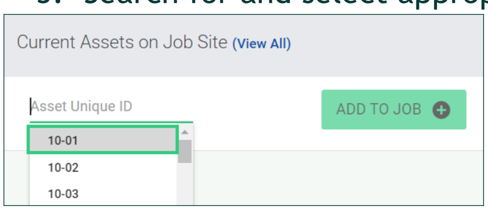
1. Click **Jobs**



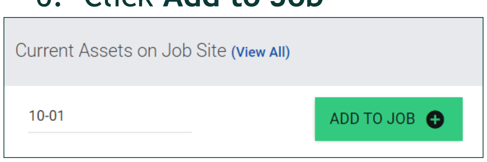
2. **Search** for the Job
3. Click **Job ID** or **Address** or **Details**



4. Click **Asset Unique ID**
5. Search for and select appropriate **Asset ID**

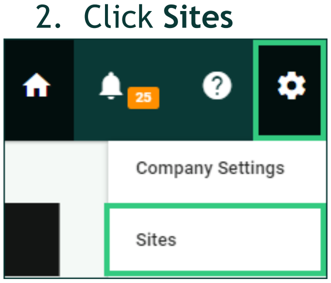


6. Click **Add to Job**

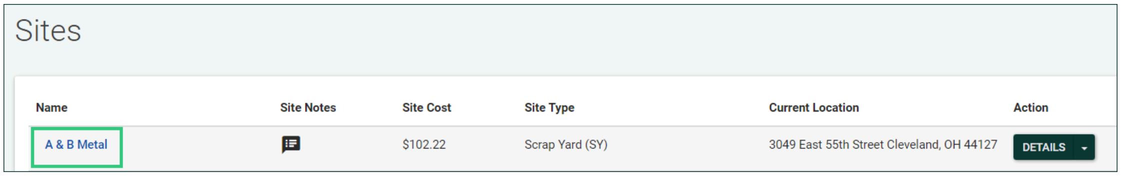


Attach an Asset to a Site

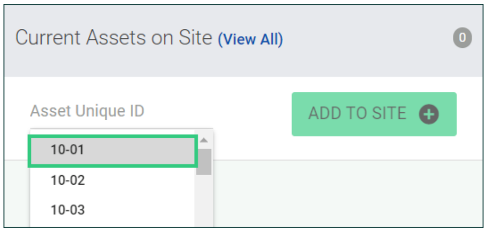
1. Click **Settings**
2. Click **Sites**



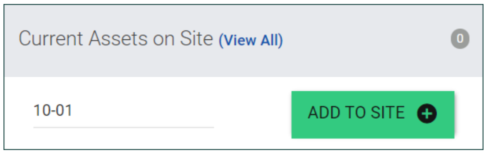
3. Click appropriate **Site Name** or **Details**



4. Click **Asset Unique ID**
5. Search for and select appropriate **Asset ID**

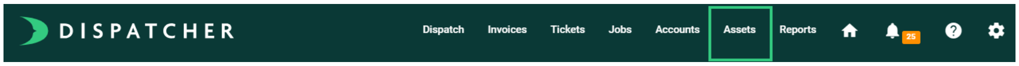


6. Click **Add to Site**

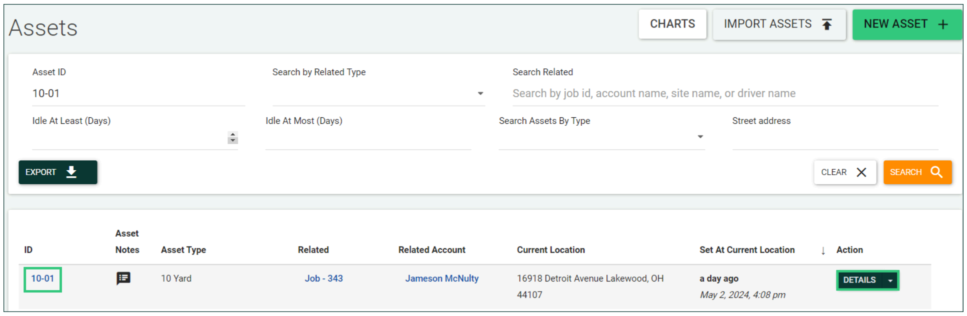


Manually Set an Asset's Location

1. Click **Assets**

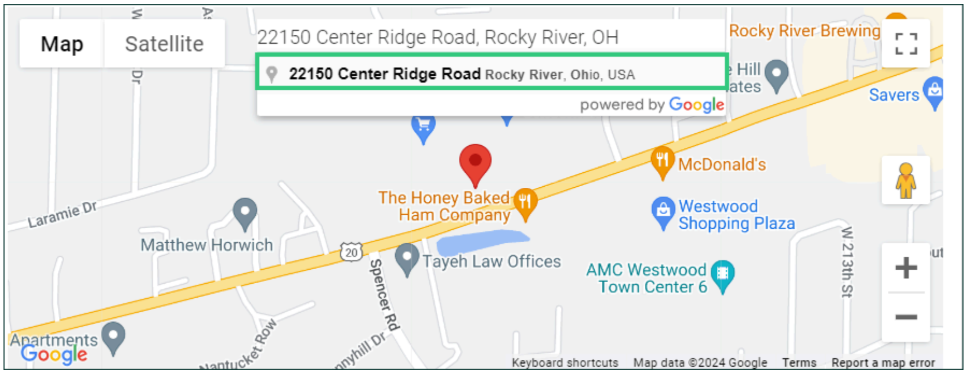


2. Search and click the appropriate **Asset ID** or **Details**



3. Click **Edit Asset**

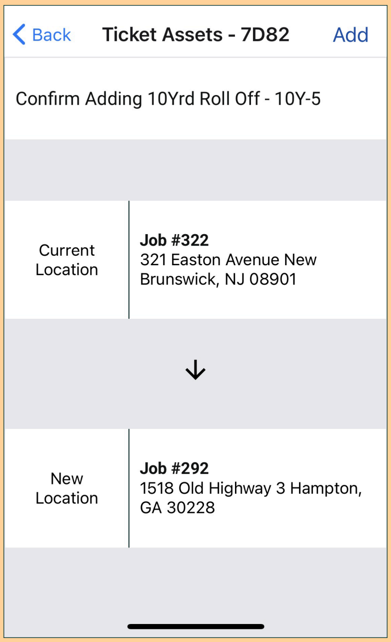
4. **Enter Address** *be sure to select the Google populated address



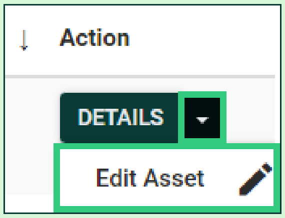
5. Click **Save Changes**

Assets Can Only have One Location: Once an asset is added to a new job, site, or custom location, it is automatically removed from its previous location. You can view asset activities by clicking on Assets, searching for and selecting the appropriate asset ID, and then scrolling down to Asset Activities.

Drivers are prompted to confirm the location they are removing the asset from before adding it to the new location. This helps avoid removing it from an incorrect site or job.



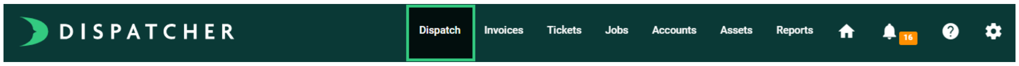
💡**Dispatcher Tip:** From the Assets page, click the Details dropdown arrow to quickly Edit Asset without the extra clicks of going into an Asset's details page.



Asset Inventory

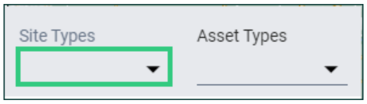
Use the Asset Inventory widget to view the Asset count at each Site. Enable Required Actions to ensure drivers are appropriately assigning Assets to the correct Sites and Jobs.

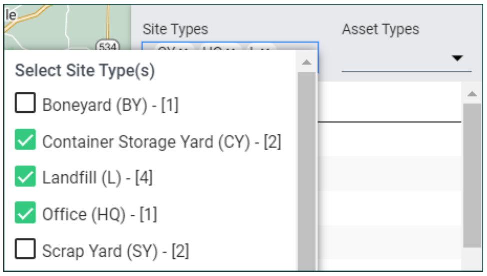
1. Click **Dispatch**



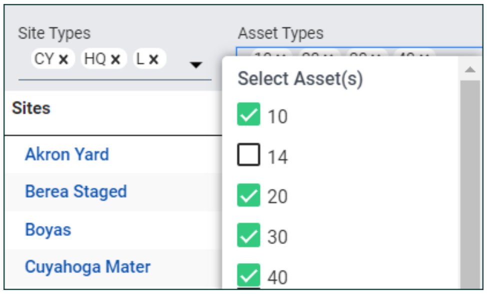
2. Click **Asset Inventory**

3. Click appropriate **Site Types**





4. Click appropriate **Asset Types**



The number of Assets Types showing at each Site are the Assets currently placed at these locations.

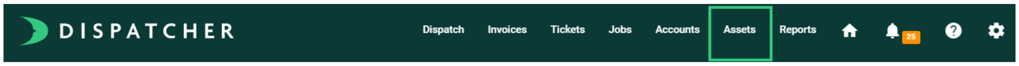
Site Types: CY x HQ x
Asset Types: 10 x 20 x 30 x 40 x

Sites	10	20	30	40
Berea Staged		1	1	
Akron Yard				2
HQ	4	4	6	7
Total	4	5	7	9

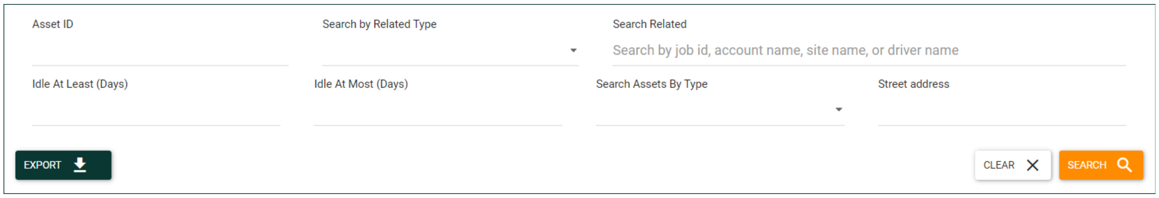
Asset Management
Using the Assets Filter

The Assets report provides greater insight to where your Assets are and next steps to take with customers or drivers based on locations and how long they have been sitting at the location.

1. Click **Assets**



2. Use the filter to search for appropriate Assets by various ways:
   - **Asset ID:** unique label used for identifying your individual assets
   - **Search by Related Type:** view all Assets on Jobs, Sites, or Drivers' trucks
   - **Idle At Least (Days):** number of days an idle has been sitting and more
   - **Idle At Most (Days):** number of days an idle has been sitting and less
   - **Search Assets By Type:** view all Assets according to their type
   - **Street Address:** search by Assets' current location

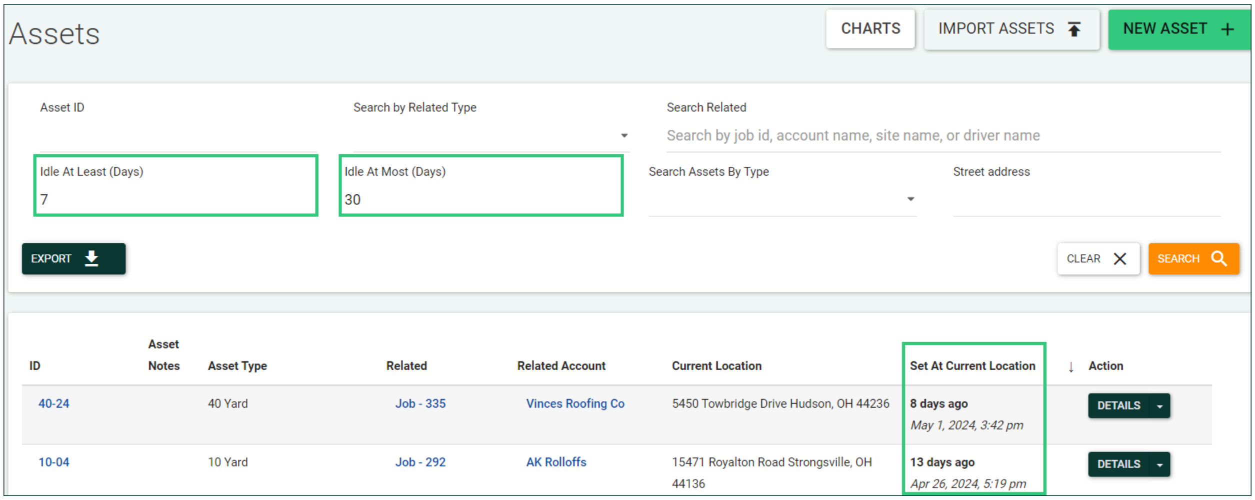


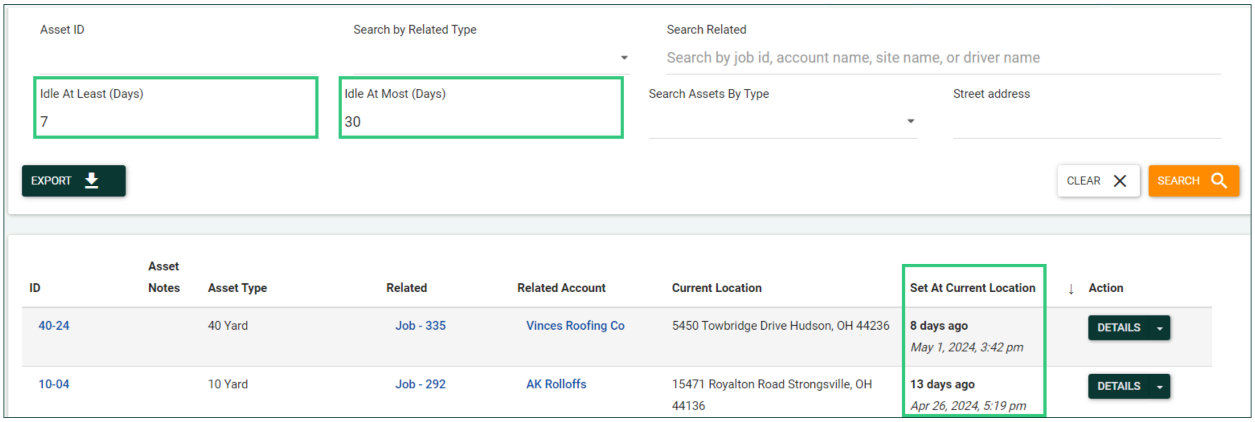
Use this report to identify assets that have been sitting for a particular period of time, prompting you to schedule pickups with customers. Additionally, identify assets associated with a driver, which will prompt you to speak with the driver about the asset's location. Regularly monitoring these filters ensures accurate asset locations and provides valuable insight into your inventory.

Export the data to be sent an Excel report.

Track Assets Sitting Longer than Rental Period

1. Click **Assets**
2. Use the **Idle At Least** and **Idle At Most** fields to search for assets by adding the appropriate number of days



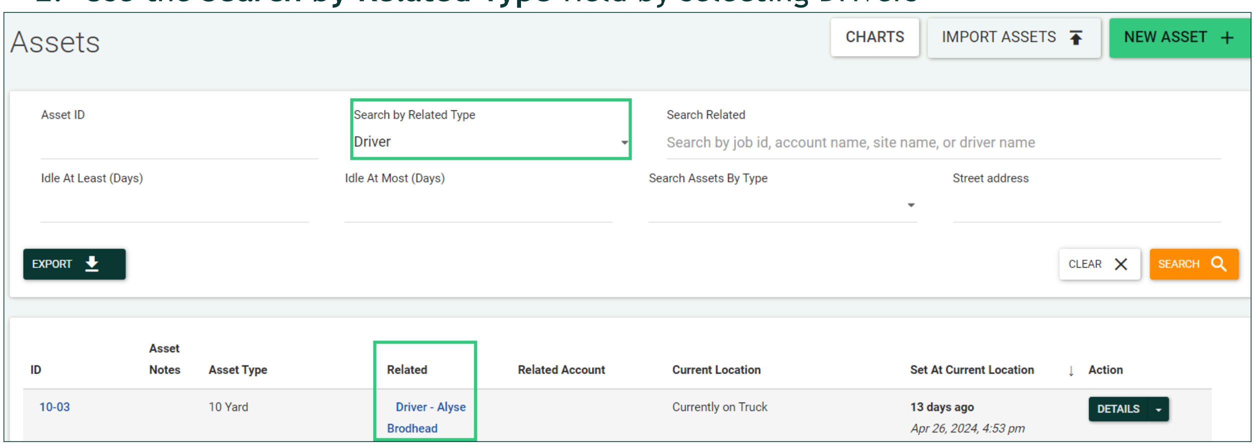


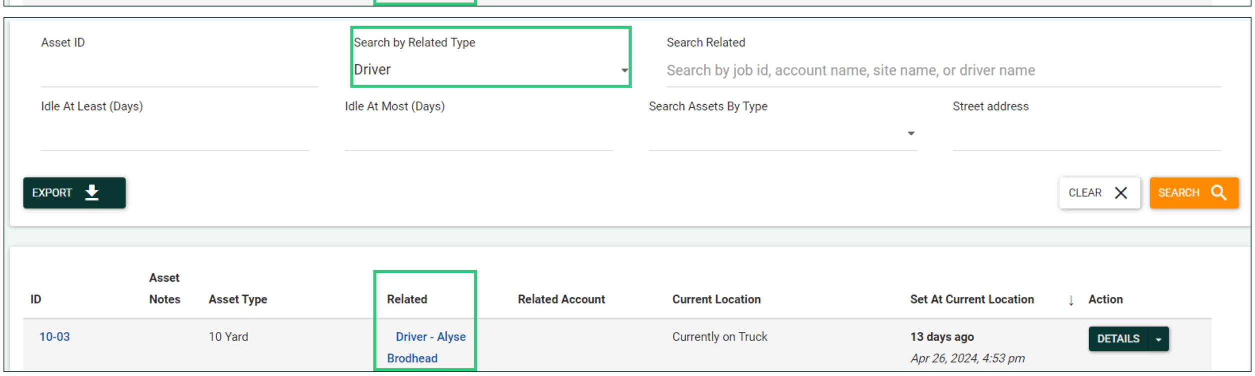
For example, assets sitting longer than 7 days may require a follow-up call. Enter 7 under Idle At Least (Days).

Track Assets On Drivers' Trucks

If an Asset is associated with a Driver, it means that they have removed the Asset from a Job, but have not yet updated the Assets next location. Use this report to follow up with your drivers and ensure all Assets are set at the right location.

1. Click **Assets**
2. Use the **Search by Related Type** field by selecting Drivers



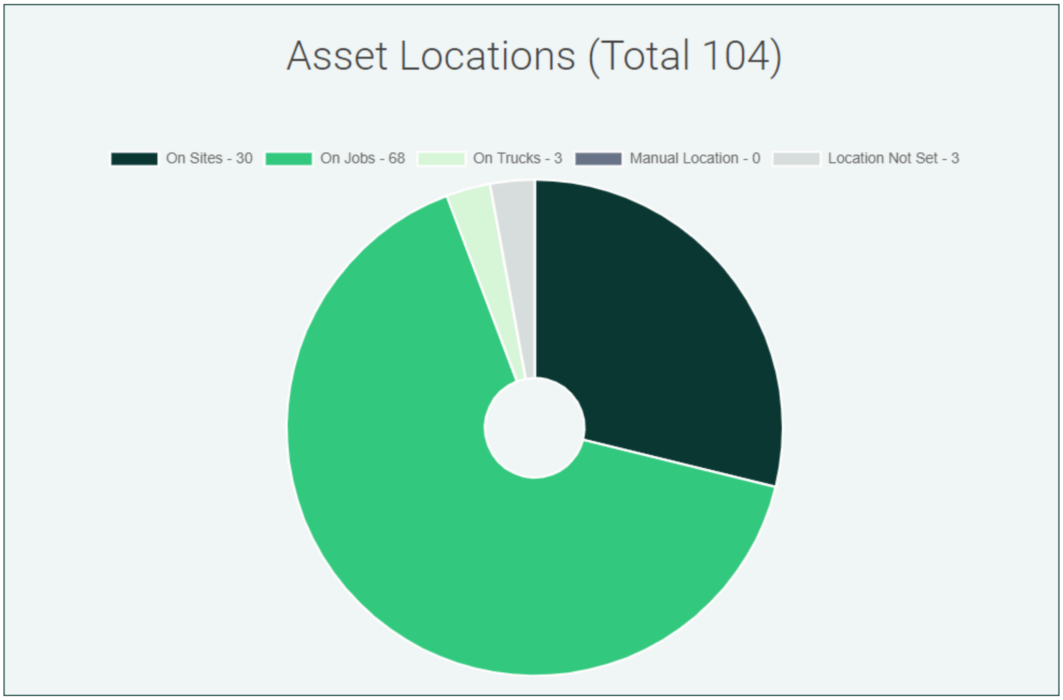


Ensure Drivers are Adding and Removing Assets accordingly through Required Actions.

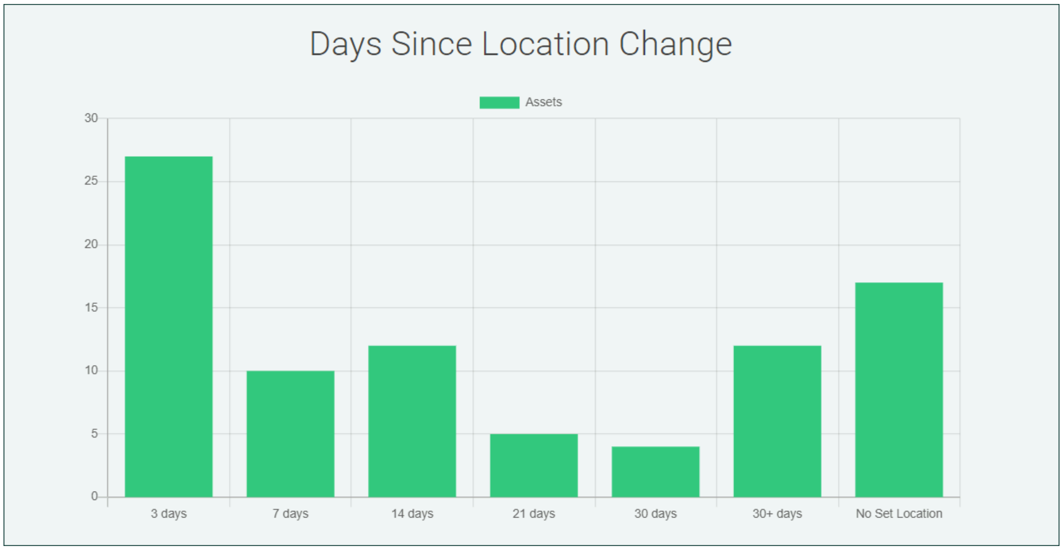
Using the Charts Feature

Assets Charts provide a different view of your Assets' locations and allow you to quickly filter Assets accordingly.

1. Click **Assets**
2. Click **Charts**
3. Use the **Assets Location** chart to view a breakdown of the number of assets you have out on jobs, sitting at a site, or have no location set



4. Use the **Days Since Location Change** graph to see how long assets have been sitting on a job or site. Click on each bar to filter the list of these assets and identify the customers you need to follow up with



Billing and Invoicing

Dispatcher offers all-in-one invoicing and payment processing features. Additionally, it integrates with QuickBooks Online for invoicing and accounting. This section walks you through these options and how to get started with the option that best suits your needs.

Dispatcher Invoicing Settings

Choose the system you want to use to send open Invoices to customers from:

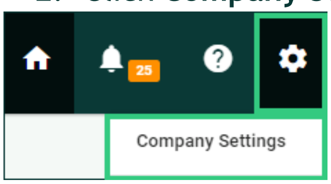
- **Dispatcher Invoicing**: Send open invoices from Dispatcher with customizable Terms and Conditions language
- **QuickBooks Online**: Export open invoices to QuickBooks Online and choose when to tell QuickBooks to send your invoices
- **None/Other**: Choose this option if you do not want to send open invoices to customers

Dispatcher and QuickBook Online Invoicing: QuickBooks Online users can select Dispatcher as their invoicing option to gain additional invoicing features while still utilizing all QBO features.

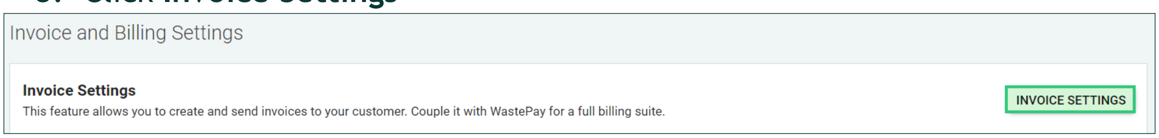
Dispatcher Invoicing

In addition to sending your invoices from Dispatcher with customizable Terms and Conditions language, Dispatcher Invoicing allows you to Set Default Payment Terms, record Cash/Check/Other payments, and include a Pay Now link if you're integrated with our payment processing features so customers can pay their Invoices online.

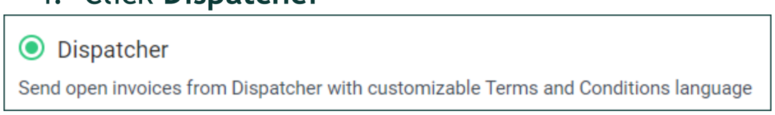
1. Click **Settings**
2. Click **Company Settings**



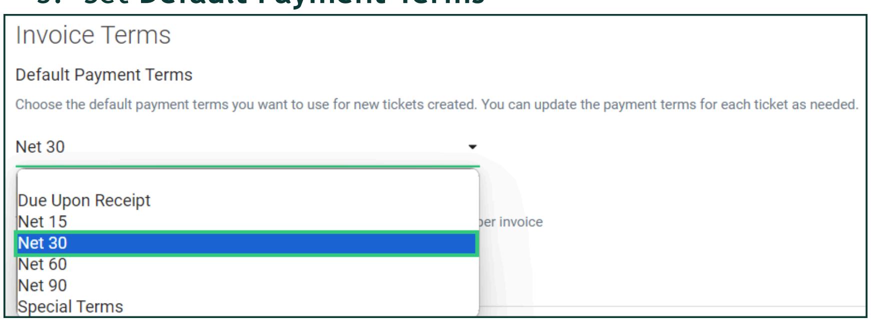
3. Click **Invoice Settings**



4. Click **Dispatcher**



5. Set **Default Payment Terms**



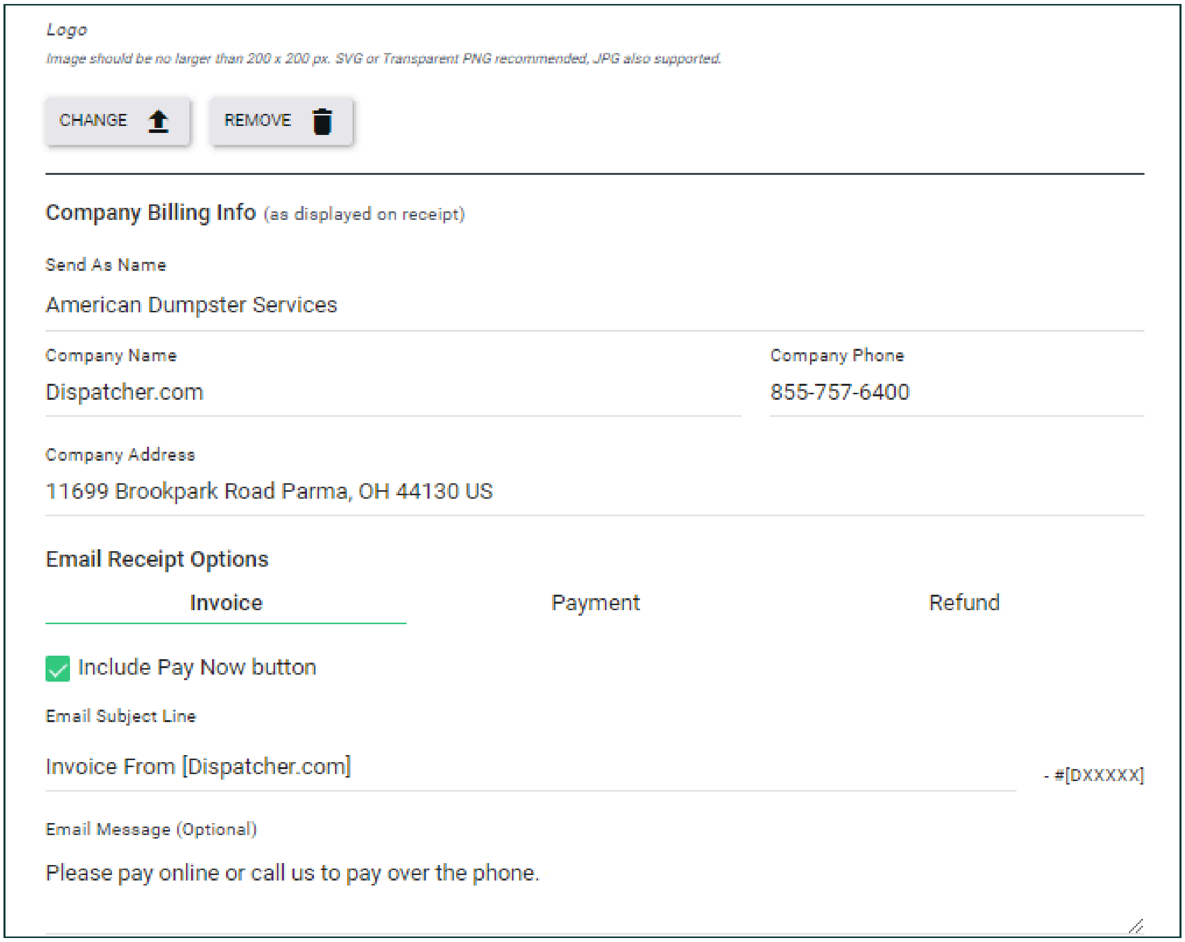
6. Customize **Default Terms and Conditions**

Default Terms and Conditions

This is an explanation of terms and conditions and how they can be edited per invoice

Customer agrees to rent a dumpster from Company according to the prices and fees set forth at the time of rental. The rental period begins the day the dumpster is dropped off, unless otherwise granted by Company. (c) Weight Limit. Customer agrees to restrict tonnage to 2 tons for a 12yd and 4 tons for a 20 yd.

7. Customize **Invoice Email Receipt Options**
    - **Logo:** add your company's logo by uploading an image no larger than 200 x 200 px.
    - **Company Billing Info:** update you company name, phone, address displayed on invoices
    - **Include Pay Now button:** give your customers the ability to pay their invoices online if you are connected with WastePay
    - **Email Subject Line:** edit the first line customers see when they receive your Invoice. The Invoice number will automatically be included
    - **Email Message** (optional): add a message to your email body



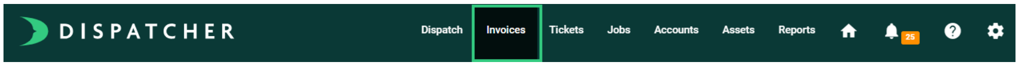
8. Click **Save Changes**

SAVE CHANGES ✓

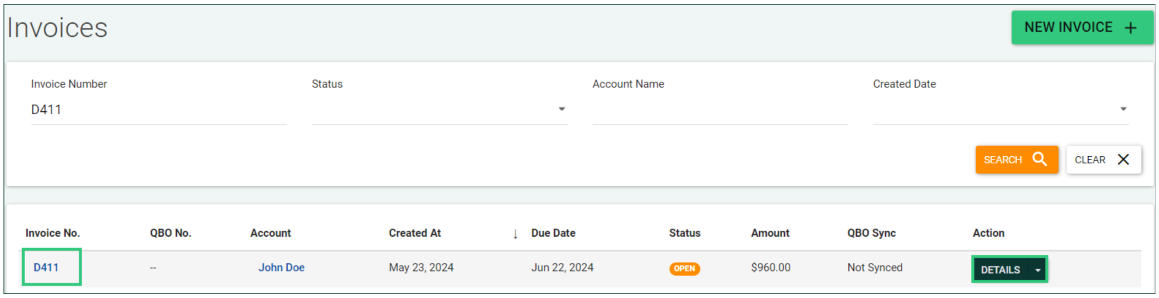
Send an Invoice from Dispatcher

Once an Invoice is created and you're ready to send the invoice to the customer, head to the invoice review page.

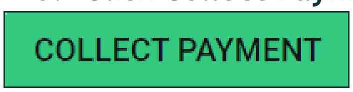
1. Click **Invoices**



2. Search and click appropriate **Open Invoice** you would like to send

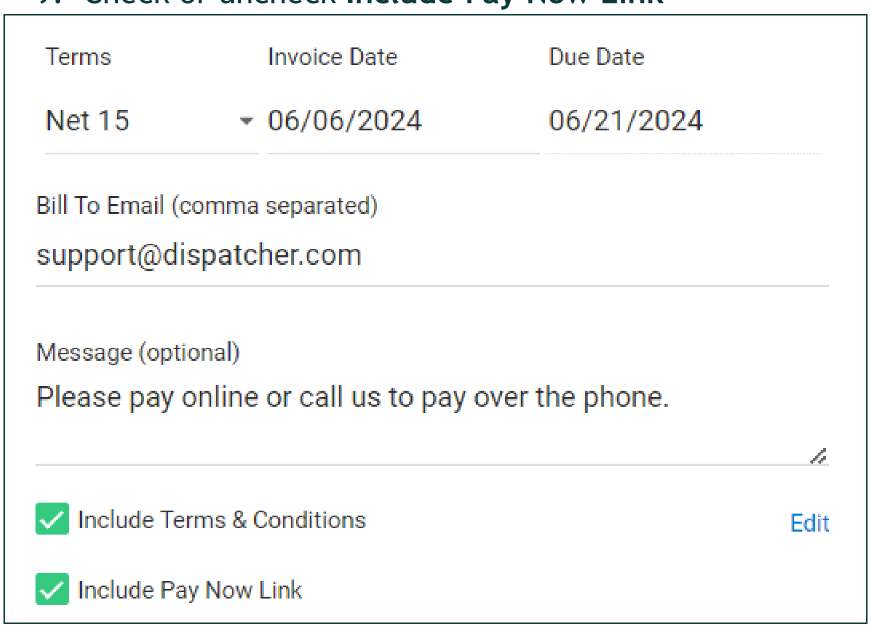


3. Click **Collect Payment**

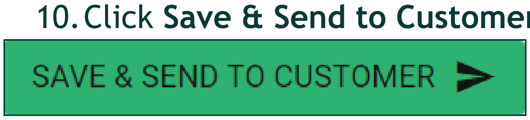


4. Click **Send Your Invoice**

5. Confirm your **Terms** are correct
6. Confirm the **Email** to send the invoice to is correct
7. Change the default **Message** if applicable
8. Check or uncheck **Include Terms & Conditions**
9. Check or uncheck **Include Pay Now Link**



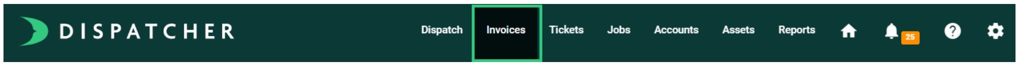
10. Click **Save & Send to Customer**



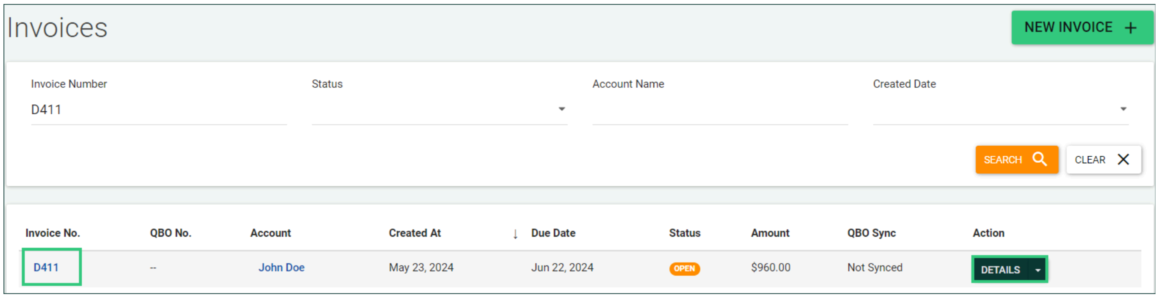
How to Void an Invoice

Keep reporting clean and accurate by voiding any invoice that was accidentally created or no longer needed.

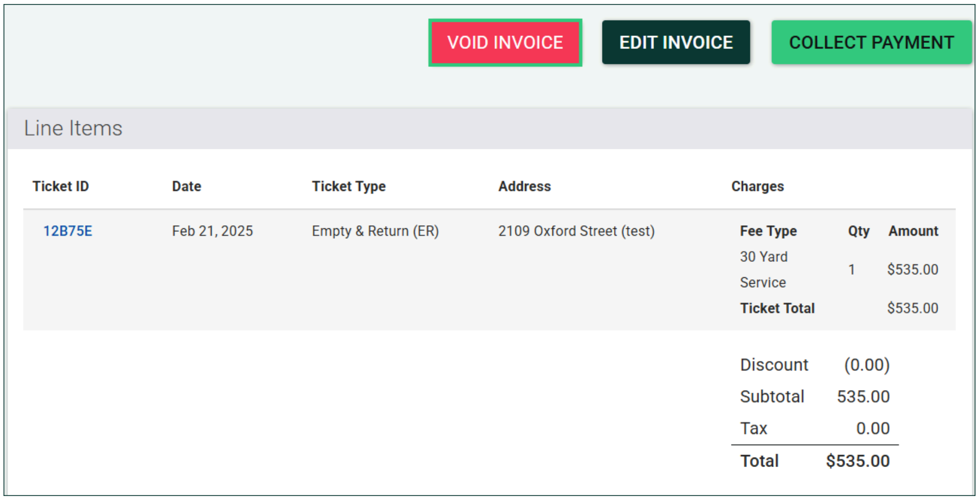
1. Click **Invoices**



2. Search and click appropriate **Open Invoice** you would like to void



3. Click **Void Invoice**

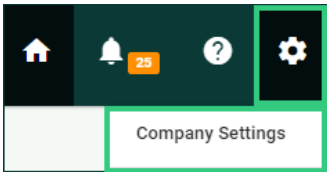


If you do not remove any Ticket(s) associated with the Invoice beforehand, they will automatically be removed, and their Billing Status will update to “Pending” or their Default Billing Status. Once an Invoice is voided, it can no longer be edited. You will receive an error when attempting to void an Invoice that has a partial payment.

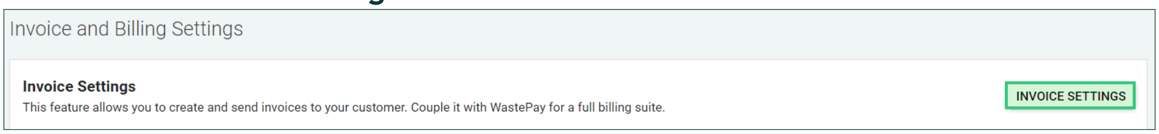
QuickBooks Online Invoicing

QuickBooks Online users can integrate their account with Dispatcher to streamline processes and eliminate duplicate entries. Track service and billing details in Dispatcher, then export Invoices to QuickBooks Online. Our QBO integration works perfectly with our payment processing features. Sync Invoices and payments to QBO with just one click.

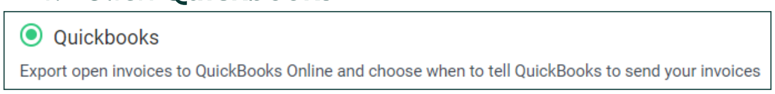
1. Click **Settings**
2. Click **Company Settings**



3. Click **Invoice Settings**

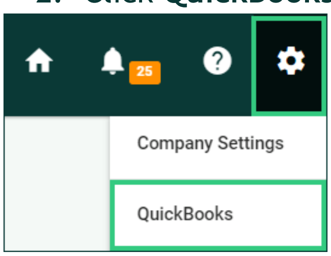


4. Click **Quickbooks**

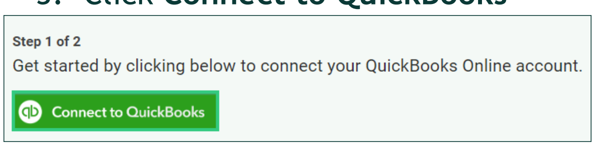


Although you selected QuickBooks as your invoicing option, there are still required steps to get connected.

1. Click **Settings**
2. Click **QuickBooks**



3. Click **Connect to QuickBooks**



4. Enter your **QuickBooks Online credentials**

First Time Login: A QuickBooks Online Administrator user will have to log in for the first time to make the initial connections.

Importing Customers from QuickBooks Online

New Dispatcher users can utilize this feature to import their QuickBooks customers. This will ensure that any existing customers are already synced, allowing repeat business to be managed efficiently.

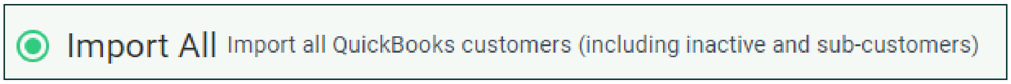
Names must match exactly: If you are importing your customers for the first time and have no Accounts in Dispatcher, you should be good to go. If you already have Accounts created in

Dispatcher, export both lists to confirm the names match exactly. Duplicates will be created if the names do not match. Reach out to support at 855-755-6400 if you have any questions.

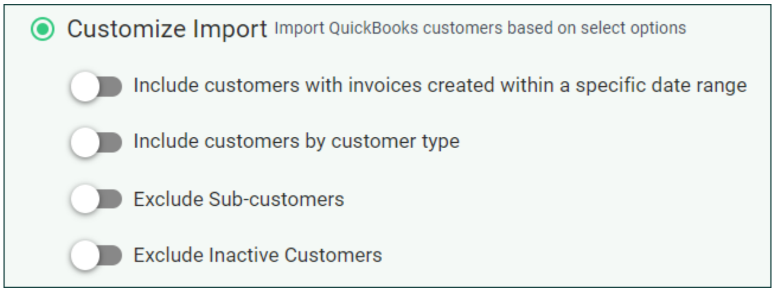
Choose an option that best suits your needs. If there are duplicate account names already present in Dispatcher, we will link the one created first with the same name in QuickBooks.

1. Select **Skip Import**

2. Select **Import All** to import all your customers



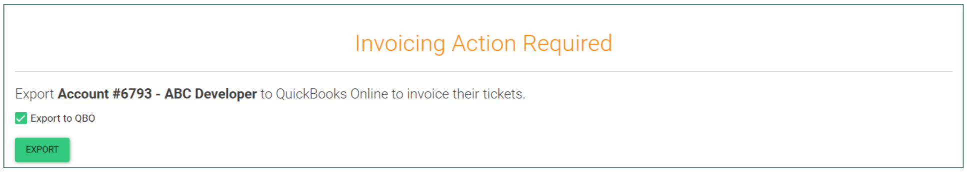
3. Select **Customize Import** (If you choose customize, select the parameters you'd like to use to narrow down the list of customers)



When your import is complete you will receive an email. Click the link in the email to review your import.

Creating New Accounts in Dispatcher

Add new customers in Dispatcher as you will be prompted to export new customers over to QuickBooks when first sending an invoice for that Account.

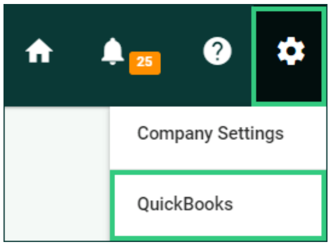


QuickBooks Invoice Settings

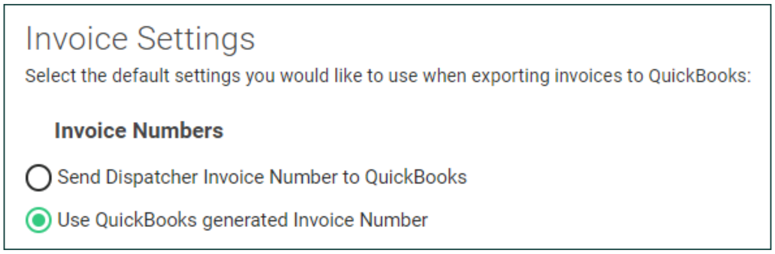
We recommend using QuickBooks-generated invoice numbers to avoid duplicates and maintain flexibility for manual Invoice creation in QBO. Enabling this setting is a two-step process.

Step 1: Enable in Dispatcher

1. Click **Settings**
2. Click **QuickBooks**



3. Click **Use QuickBooks generated Invoice Number**



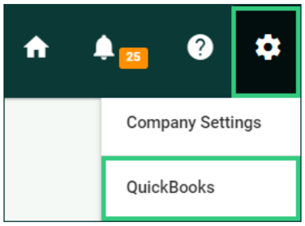
Step 2: Enable in QuickBooks

1. Login to **QuickBooks Online**
2. Go to **Settings**
3. Select **Account and settings**
4. Select **Sales**
5. In Sales form content, select **Edit** ✎
6. Deselect **Custom transaction numbers**
7. Select **Save**, then select **Done**

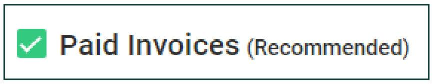
QuickBooks Integration Settings

WastePay users can choose the information they would like to keep updated in real time. We recommend automatically export invoices to QuickBooks after submitting payments. Please note that this will only occur when the Invoice is paid in full and applies to all payment methods, not just credit card payments. Unchecking this option will prompt you to manually export the invoice after submitting payment.

1. Click **Settings**
2. Click **QuickBooks**



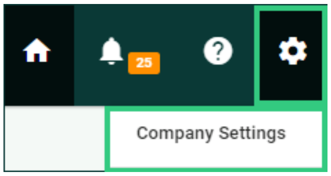
3. Check **Paid Invoices (Recommended)**



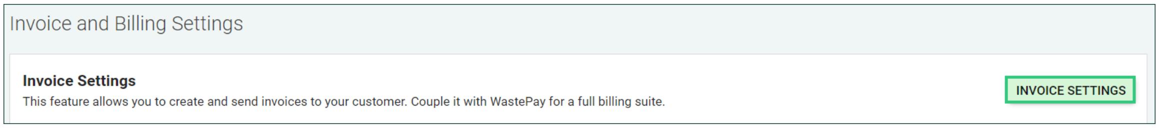
None/Other

Choose this option if you prefer not to send open invoices via Dispatcher or QuickBooks Online because you are using a different system.

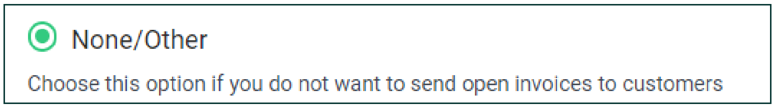
1. Click **Settings**
2. Click **Company Settings**



3. Click **Invoice Settings**



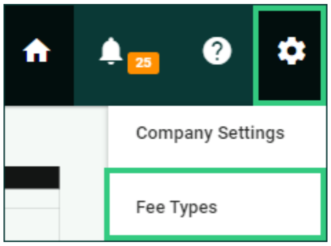
4. Click **None/Other**



Create Fee Types

To invoice customers, start by entering your Fee Types. Fee Types are standard line items you invoice customers for, each with a default dollar amount. These are added on a per-Ticket basis. You can add as many Fee Types as needed in the settings and adjust their amounts and quantities for each Ticket. Additionally, you can include Fee Type Descriptions to clarify the charges for your team and customers.

1. Click **Settings**
2. Click **Fee Types**



3. Click **New Fee Type +**

4. Fill out the appropriate details
   - **Name**: typical line item displayed to describe the charge
   - **Default Amount**: default dollar amount, adjustable per Ticket
   - **Description** (optional): details of the charge for transparency with the team and customer
5. Click **Save New Fee Type**

💡**Dispatcher Tip:** Clients appreciate understanding why they are being charged. You can provide a skeleton for a descriptive Description and update it on a ticket-by-ticket basis. For example, you can set your Fee Type Description in settings to "15 Yard Delivery, $350, X-day rental period, X tons allotted, X charge for every X pounds," and then edit the Description within the ticket to specify details like "7-day rental period, 2 tons allotted, $50 charge for every 100 pounds."

QuickBooks Users: Fee Types are mapped to QBO’s Product/Services. Once prompted to map which Product/Service you’d like to link to, you will be asked if you want to proceed with QBO’s Description for Dispatcher's Description.

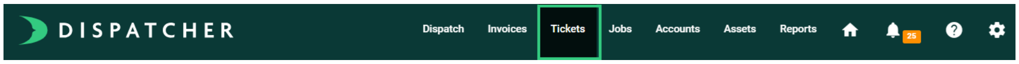
Create and Edit Invoices

Once Fees Types are added to your account, begin creating Invoices.There are two ways to create an invoice:

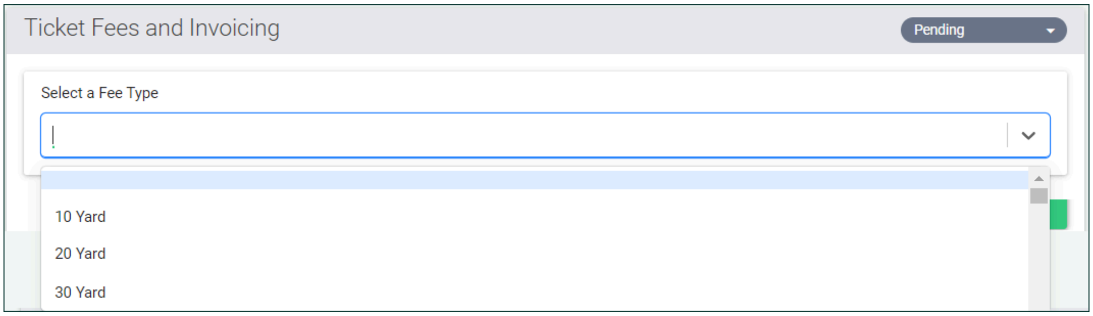
- Create a single Invoice from a Ticket
- Create a multi-Ticket Invoice from the Invoice page

Create an Invoice from a Ticket

1. Click **Tickets**
2. Click appropriate **Ticket**



3. Add Ticket **Fee Types** associated with the service



4. Click **Save & Create Invoice**

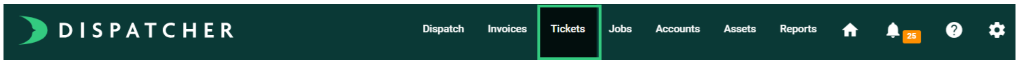
5. Review the invoice summary and select the next step based on your invoicing settings

Save Fees: If you are not ready to create a single Ticket invoice or plan to add this service to a multi-Ticket invoice, click **Save Fees**.

Edit Single Ticket Invoice

If you need to add or edit a fee on the invoice, you should be prompted to do so within the review page. You can click **Edit Invoice** or go to the Ticket itself to make changes.

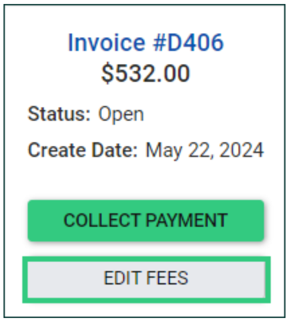
1. Click **Tickets**



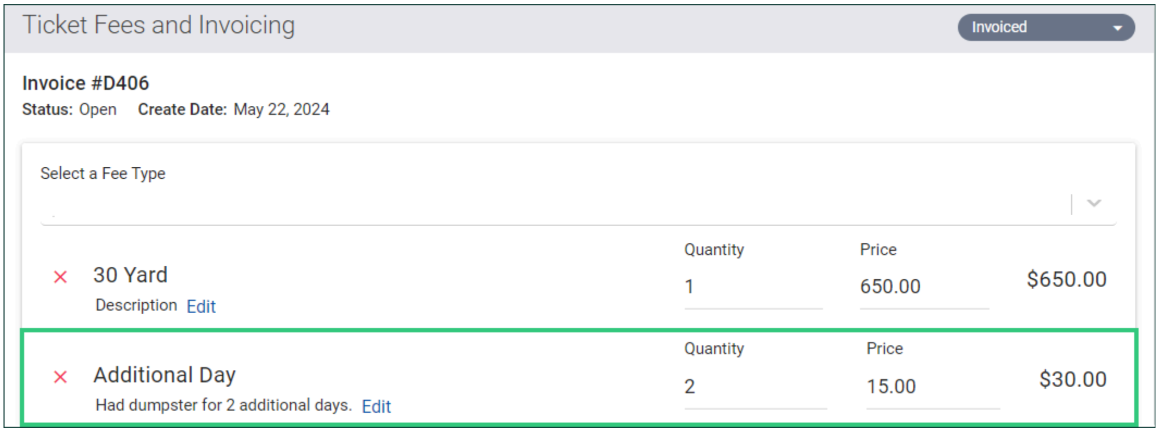
2. **Search** for the appropriate Ticket
3. Click the **Ticket ID**

☐	ID	Flagged	Status	Billing Status	Date ↓	Ticket Type	Asset Type	Account Name	Job ID	Address	Weight	Weight Ticket Number	Driver	Action
☐	D1B000		OPEN	Pending	Apr 17, 2024	Switch (SW)	10 Yard (10)	Yellowcreek Const	323	48 Prescott Drive Hudson, OH 44236	N/A	N/A	None	DETAILS

4. Click **Edit Fees**



5. Adjust the **Ticket Fees**

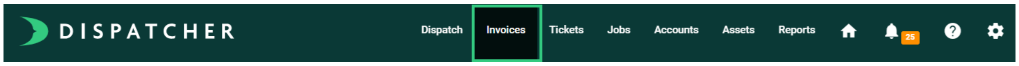


6. Click **Save & Return to Invoice**

Create an Invoice from the Invoice List

Creating an Invoice from the Invoice list allows you to select several Tickets from one customer and charge them all in one Invoice. This is helpful if you collect payment after the Job is completed or on a weekly or monthly basis. View all invoiceable tickets (any Tickets with a "Pending" Billing Status) and check mark the ones you'd like to include.

1. Click **Invoices**



2. Click **New Invoice +**

3. Click **Create Invoice** next to appropriate Account

4. Select the **Ticket(s)** you want included on the invoice

Invoice	ID	Status	Date ↓	Billing Notes	Ticket Type	Asset Type	Job ID	Address	Weight (tons)	Ticket Fees Count	Action
☐	8A9FBB	OPEN	May 29, 2024		Switch (SW)	10 Yard (10)	320	McDonalds (White house, black shutters)	N/A	None	VIEW
☑	F0F59A	COMPLETED	May 27, 2024		Switch (SW)	10 Yard (10)	320	McDonalds (White house, black shutters)	1.28	1	VIEW
☑	DC7656	COMPLETED	May 24, 2024		Switch (SW)	10 Yard (10)	320	McDonalds (White house, black shutters)	0.81	2	VIEW
☑	DBA4D4	COMPLETED	Mar 27, 2024		Pick-up (PU)	20 Yard (20)	320	McDonalds (White house, black shutters)	0.89	1	VIEW

5. Click **Create Invoice**

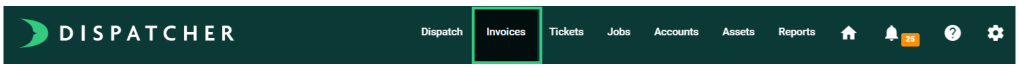
6. Review the Invoice summary and click **Save & Continue**

7. Review the invoice summary and select the next step based on your invoicing settings

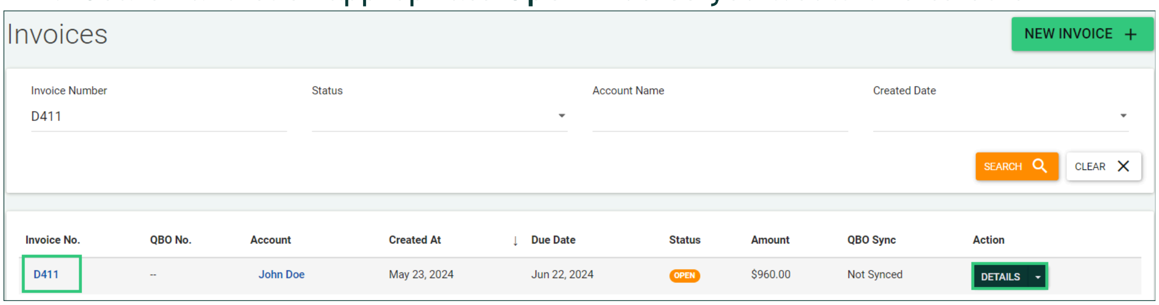
Edit Multi-Ticket Invoices

If you need to add or edit a fee on the invoice, you should be prompted to do so within the review page. You can click **Edit Invoice** or go to the Invoices page to make changes.

1. Click **Invoices**

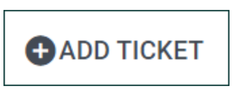


2. Search and click appropriate **Open Invoice** you would like to edit

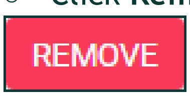


3. Click **Edit Invoice**
   - Click **Edit Fees**

   - Click **Add Ticket** to select Ticket(s) to include on invoice



   - Click **Remove** to exclude any Ticket(s) currently included on the invoices



4. Click **Save & Continue**

Manage Billing Statuses

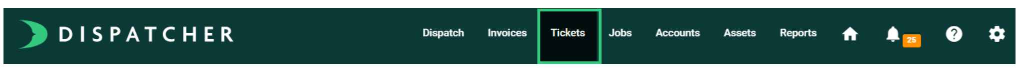
Billing statuses will automatically update based on your invoicing settings. Additionally, you can manually update statuses as needed. These statuses enable you to quickly view Pending, Invoiced, Paid, and Not Billable Tickets, streamlining your invoicing process and facilitating next steps.

Billing Status Definitions:

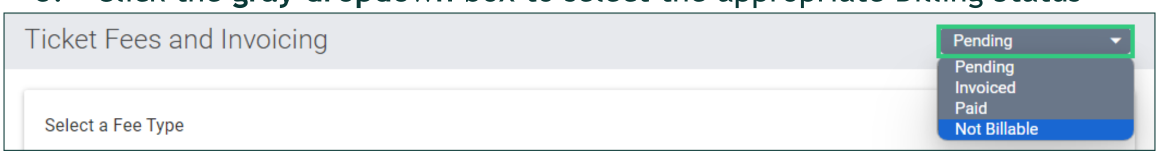
- **Pending:** All new tickets will have this status. Tickets with a Pending billing status will be shown in your list of Invoiceable Tickets
- **Invoiced:** Any Ticket associated with an Invoice. Tickets exported to QBO will automatically update to Invoiced
- **Paid:** Once payment is collected, a Ticket's Billing Status will automatically update to Paid
- **Not Billable:** Tickets that do not require invoices can be updated to "Not Billable" to remove them from your list of Invoiceable Tickets

Manually Update Billing Status

1. Click **Tickets**



2. Click appropriate **Ticket**
3. Click the **gray dropdown** box to select the appropriate Billing Status

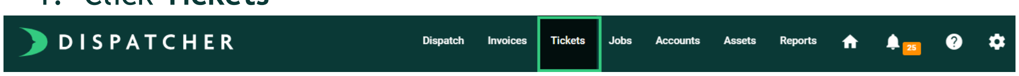


Use Billing Statuses to Filter to Invoiceable Tickets

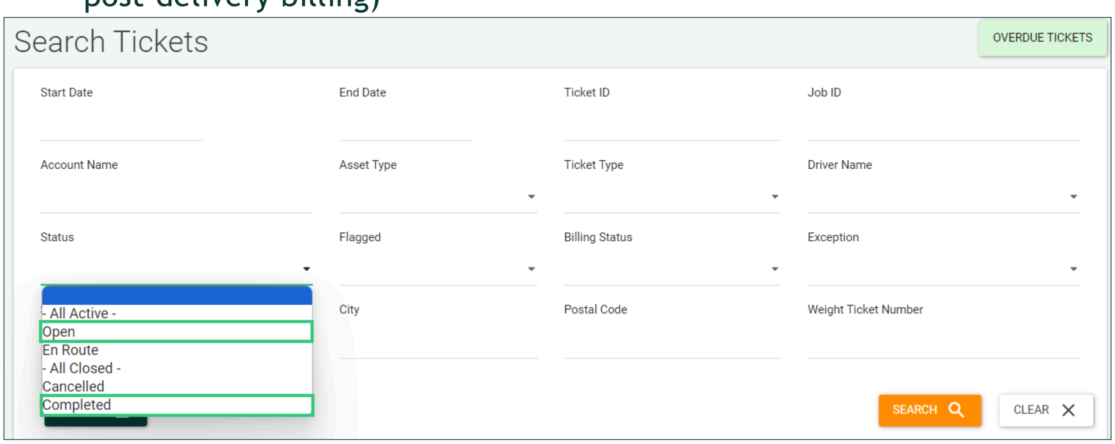
Tickets Filter

View a list of all Completed Tickets with a Pending Billing Status.

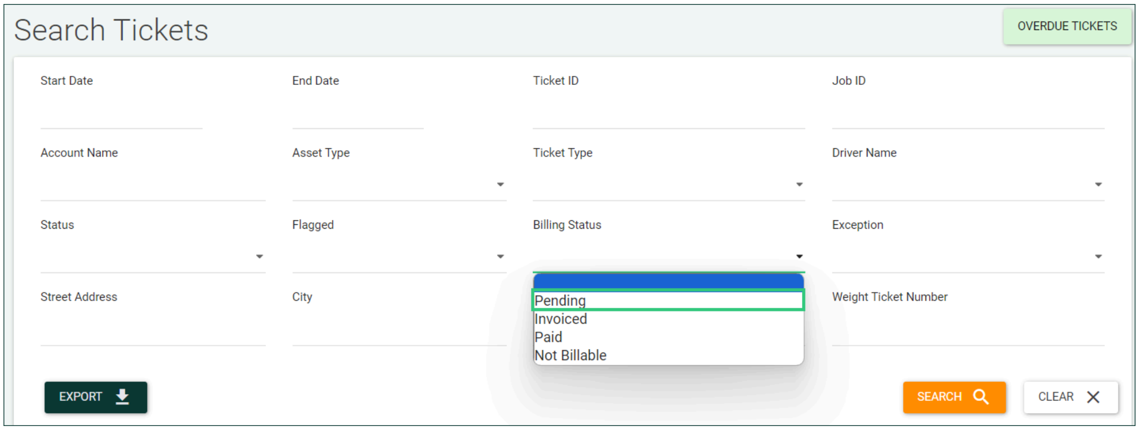
1. Click **Tickets**



2. Under the Status field, select **Open** or **Completed** (depending on pre-delivery or post-delivery billing)



3. Under the Billing Status field, select **Pending**

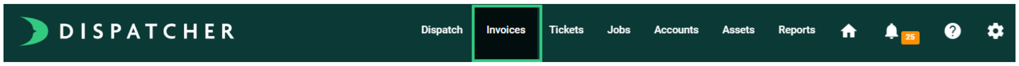


4. Click **Search**

Invoices Filter

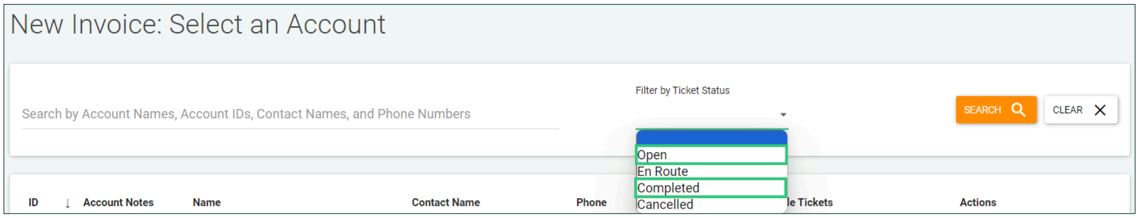
Customize the New Invoice list to Completed or Open Tickets (depending on if you bill pre-delivery or post-delivery).

1. Click **Invoices**



2. Click **New Invoice +**

3. Under Filter by Ticket Status, select **Open** or **Completed** (depending on pre-delivery or post-delivery billing)

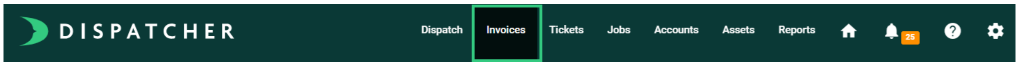


4. Click **Search**

Invoices Export

Filter the Invoices report to see open invoices, total revenue for a specific period, and outstanding balances.

1. Click **Invoices**



2. Use the filter to narrow your Search
3. Click **Export**

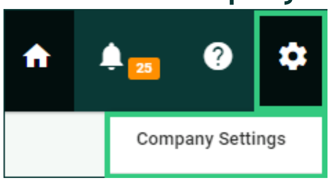
Payment Processing

Power your business with simple payment processing seamlessly integrated with Dispatcher. To speak with a member of our team regarding these features and next steps, complete our Learn More Form.

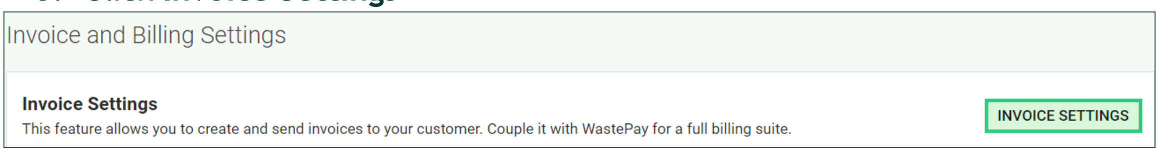
Connect to WastePay

Set up your account with payment processing features by completing an Application Form. Once completed, a member of our team will reach out with the next steps. Once your WastePay account is created, you're ready to connect to Dispatcher and begin collecting payments in-app or sending Pay Now links to your customers for online invoice payments.

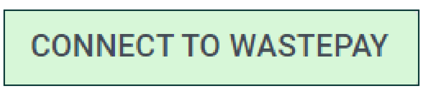
1. Click **Settings**
2. Click **Company Settings**



3. Click **Invoice Settings**



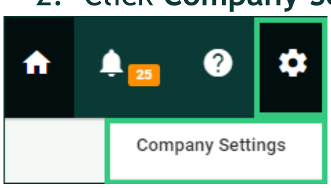
4. Click **Connect to WastePay**



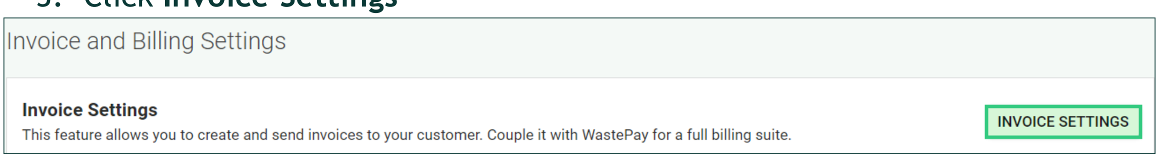
Edit Payment Processing Settings

Once a payment is processed, a receipt is created to send to your customer. Customize the receipts to match your company needs

1. Click **Settings**
2. Click **Company Settings**

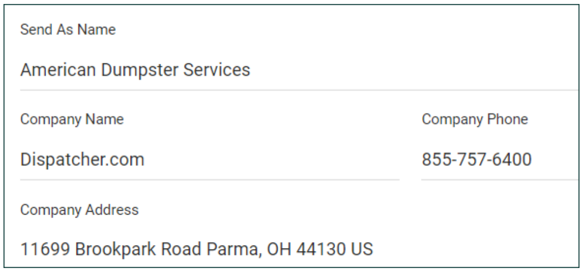


3. Click **Invoice Settings**

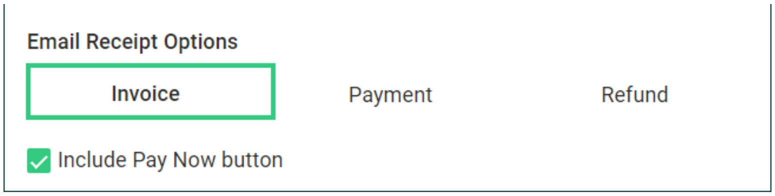


4. Upload your **Company's logo**

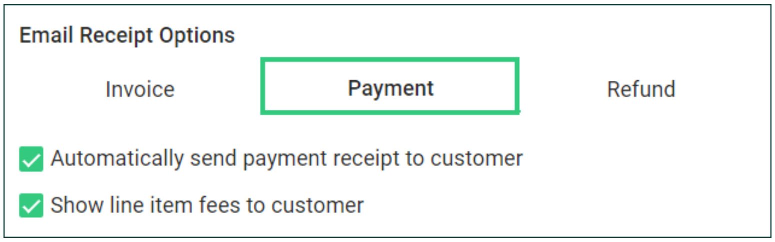
5. Edit your **Company Billing Info**



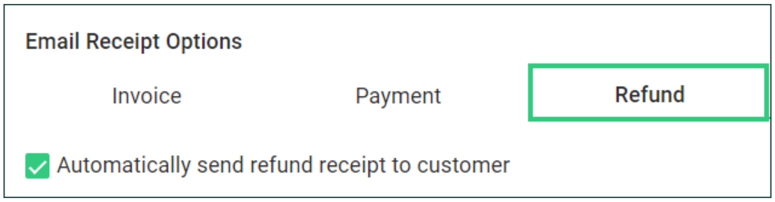
6. **Customize Email Receipt Options:**
   - **Invoice:** enable or disable **Include Pay Now** button



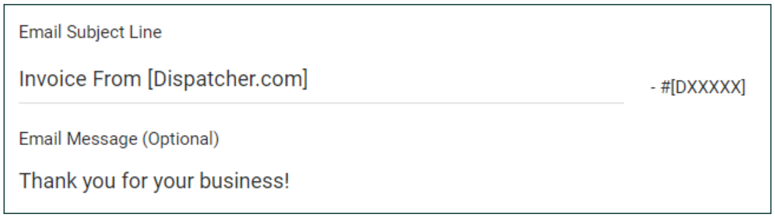
   - **Payment:** enable or disable the automatic sending of payment receipts to customers based on whether you prefer to send them automatically or manually, and choose if you want fees to be displayed on the invoice



   - **Refund:** Enable or disable Automatically send payment receipt to customer



7. Customize **Email Messages:** each invoice template includes an optional email message to include on all receipts



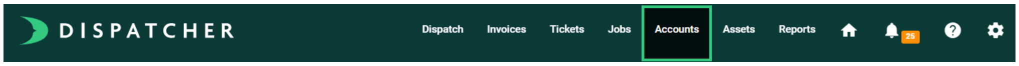
8. Click **Preview Changes** to make sure your invoice looks how you want it

9. Click **Save Changes** when all updates have been completed

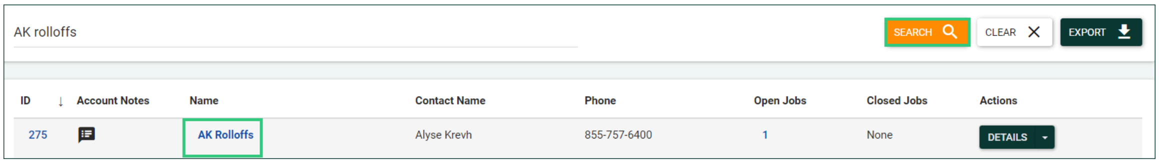
Add and Nickname Account Credit Cards

Simplify your workflow by adding and nicknaming credit cards as soon as you collect account and service details.

1. Click **Accounts**



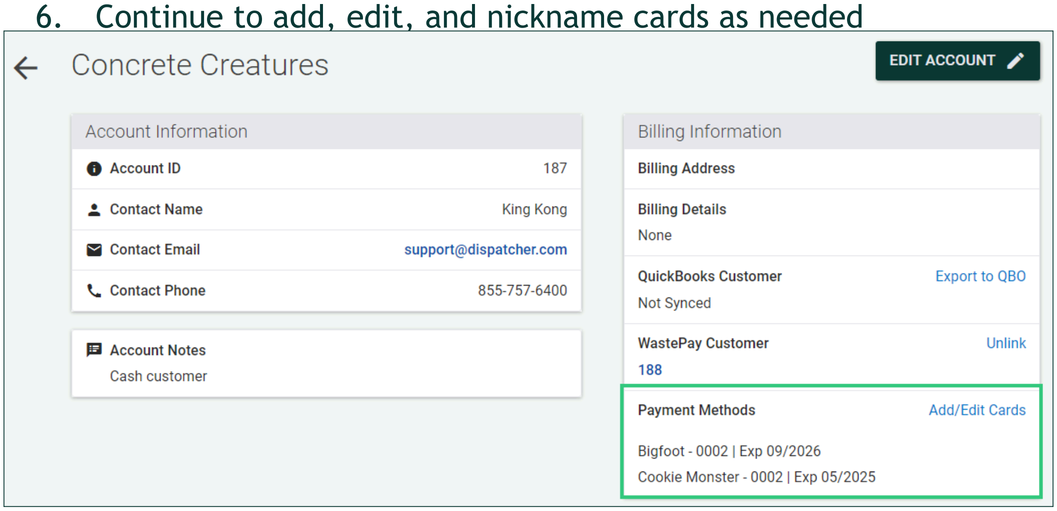
2. **Search** for the appropriate Account
3. Click **Account name**



4. Click **Add/Edit Cards**

5. Click **Add Card** and add card details

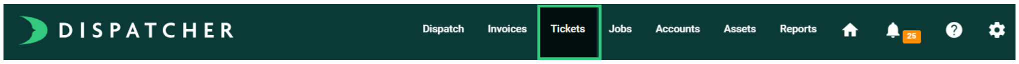
6. Continue to add, edit, and nickname cards as needed



Charge a Credit Card from a Ticket

Once Fee Types are added to a Ticket and your invoice is created, you can charge a card to collect payment.

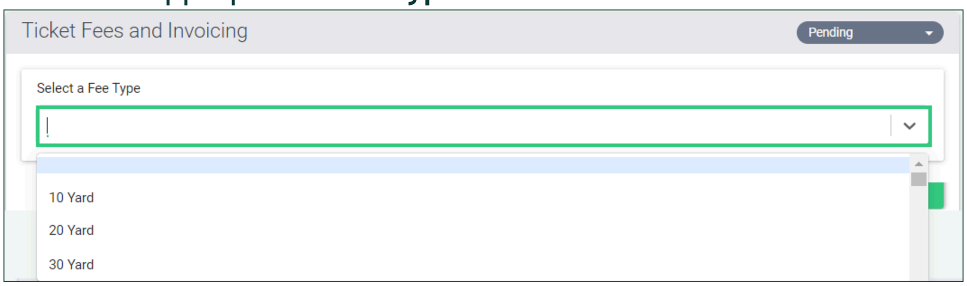
1. Click **Tickets**



2. **Search** for the appropriate Ticket
3. Click the **Ticket ID**

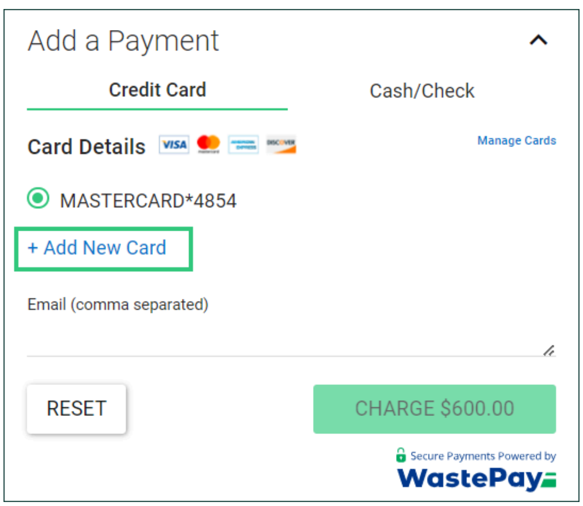
ID	Flagged	Status	Billing Status	Date	Ticket Type	Asset Type	Account Name	Job ID	Address	Weight	Weight Ticket Number	Driver	Action
D1B000		OPEN	Pending	Apr 17, 2024	Switch (SW)	10 Yard (10)	Yellowcreek Const	323	48 Prescott Drive Hudson, OH 44236	N/A	N/A	None	DETAILS

4. Add appropriate **Fee Types**

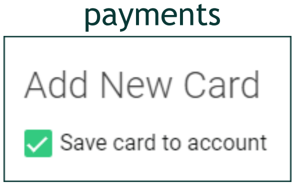


5. Click **Save & Create Invoice**

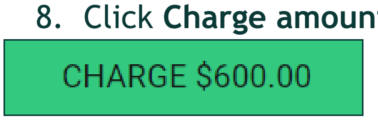
6. Click **+ Add New Card** or select Card from already saved cards list



7. Enter **Payment Details.** Notice you can save credit card information for future payments



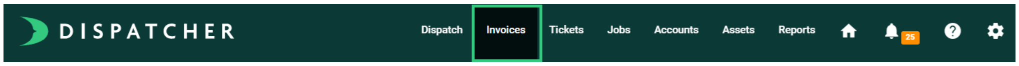
8. Click **Charge amount**



Charge a Credit Card from Invoice List

Once Fee Types are added to a Ticket and your invoice is created, you can charge a card to collect payment.

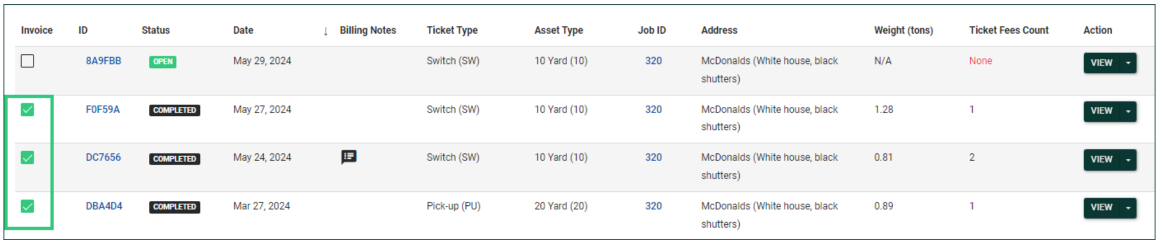
1. Click **Invoices**



2. Click **New Invoice +**

3. Click **Create Invoice** next to appropriate Account

4. Select the **Ticket(s)** you want included on the invoice

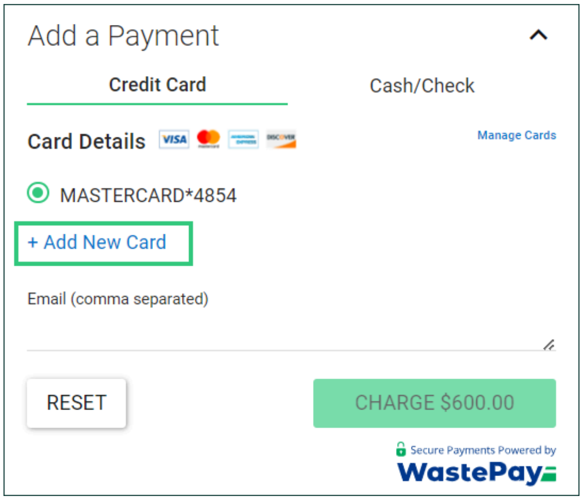


Invoice	ID	Status	Date ↓	Billing Notes	Ticket Type	Asset Type	Job ID	Address	Weight (tons)	Ticket Fees Count	Action
☐	8A9FBB	OPEN	May 29, 2024		Switch (SW)	10 Yard (10)	320	McDonalds (White house, black shutters)	N/A	None	VIEW
☑	F0F59A	COMPLETED	May 27, 2024		Switch (SW)	10 Yard (10)	320	McDonalds (White house, black shutters)	1.28	1	VIEW
☑	DC7656	COMPLETED	May 24, 2024		Switch (SW)	10 Yard (10)	320	McDonalds (White house, black shutters)	0.81	2	VIEW
☑	DBA4D4	COMPLETED	Mar 27, 2024		Pick-up (PU)	20 Yard (20)	320	McDonalds (White house, black shutters)	0.89	1	VIEW

5. Click **Create Invoice**

6. Review the Invoice summary and click **Save & Continue**

7. Click **+ Add New Card** or select Card from already saved cards list

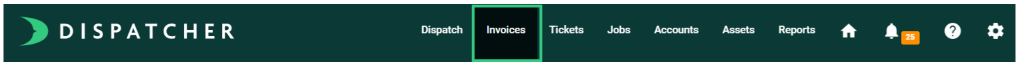


8. Enter **Payment Details.** Notice you can save credit card information for future payments.
9. Click **Charge Amount**

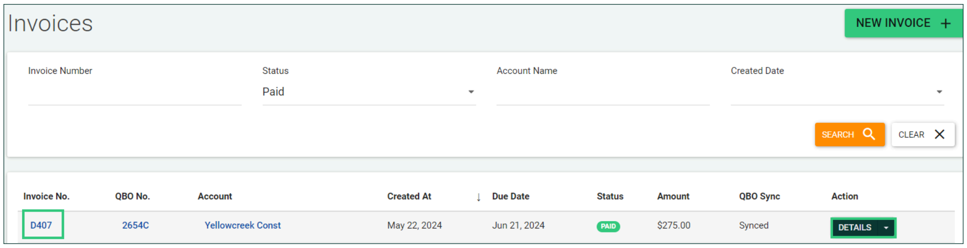
Refund a Payment from Invoice List

If you ever need to refund a customer a full or partial amount, you can do so right within Dispatcher

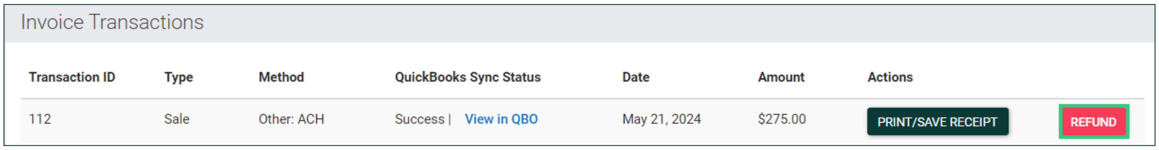
1. Click **Invoices**



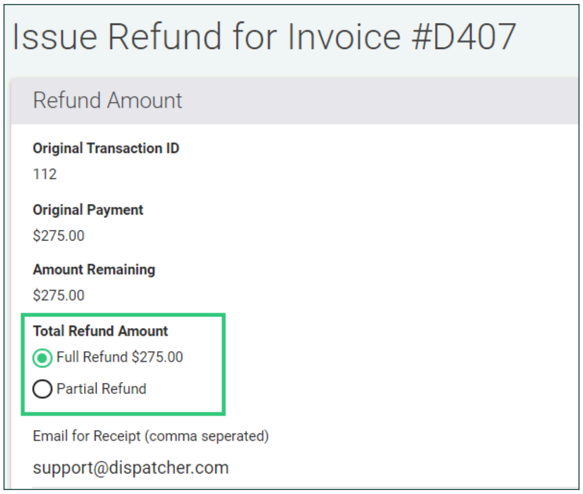
2. Search and click appropriate **Paid Invoice** you would like to refund



3. Click **Refund**



4. Select **Full Refund** or **Partial Refund**

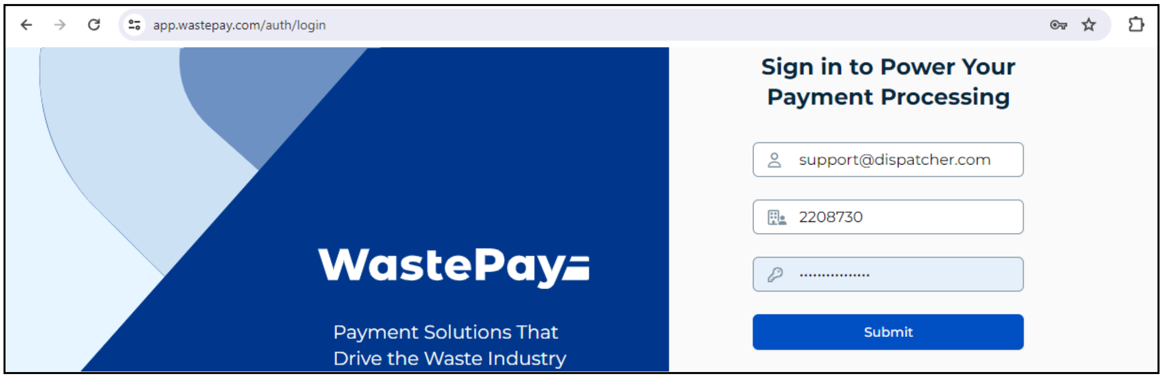


5. Click **Submit Refund Amount**

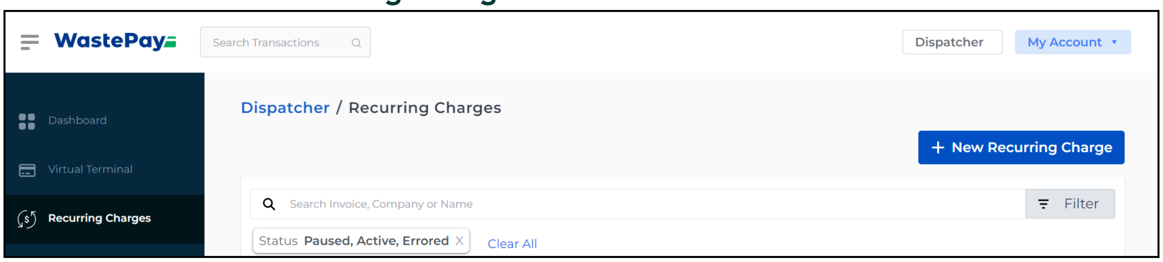
Create a Recurring Charge

If you ever need to set up a recurring payment, jump into the WastePay portal to do so.

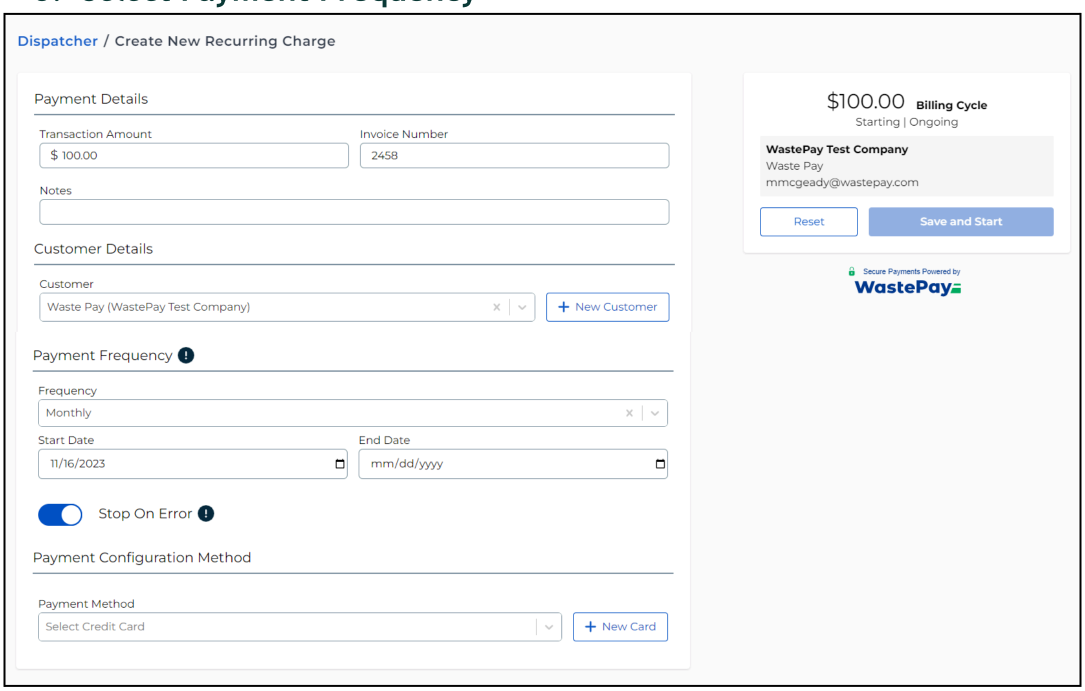
1. Login to the **Virtual Terminal** at app.wastepay.com



2. Click the **Recurring Charge icon** in the main menu on the left
3. Click **+New Recurring Charge**



4. Enter **Payment and Customer Details**
5. Select **Payment Frequency**



6. Click **Save and Start**

Reporting

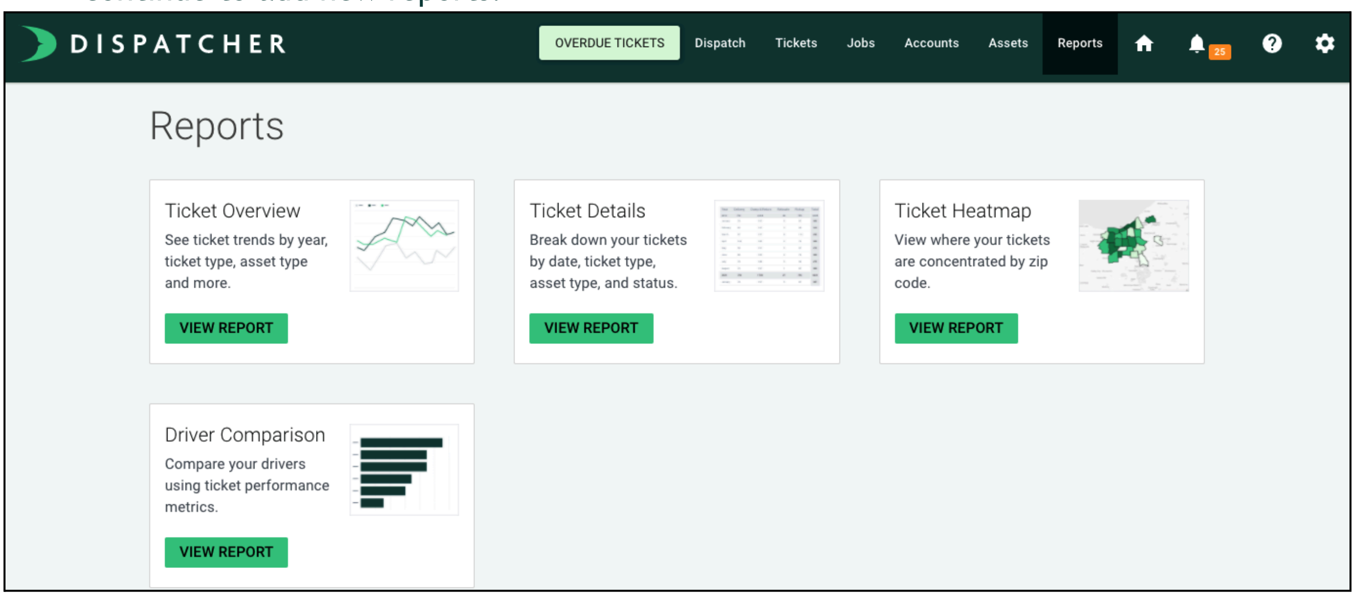
Utilize Reports

Reports are important - gain the benefit of collecting the information and having it organized for you. Don't overlook them! and reach out if you need anything. Please note, reports will include activity through the prior day. We have four reports on the report page:

- **Ticket Overview**: See ticket trends by year, ticket type, asset type and more
- **Ticket Details**: Break down your tickets by date, ticket type, asset type, and status
- **Ticket Heatmap**: View where your tickets are concentrated by zip code
- **Driver Comparison**: Compare your drivers using ticket performance metrics

1. Click **Reports**

2. Click **View Report** on the one you want to view. This page will update as we continue to add new reports.

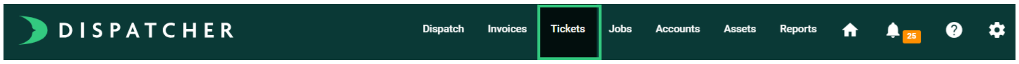


3. Use the filter options along the top of each report to customize the data that you want to look at
4. Click the **Switch Reports** arrow to select a new report to look at without having to return to the reports page

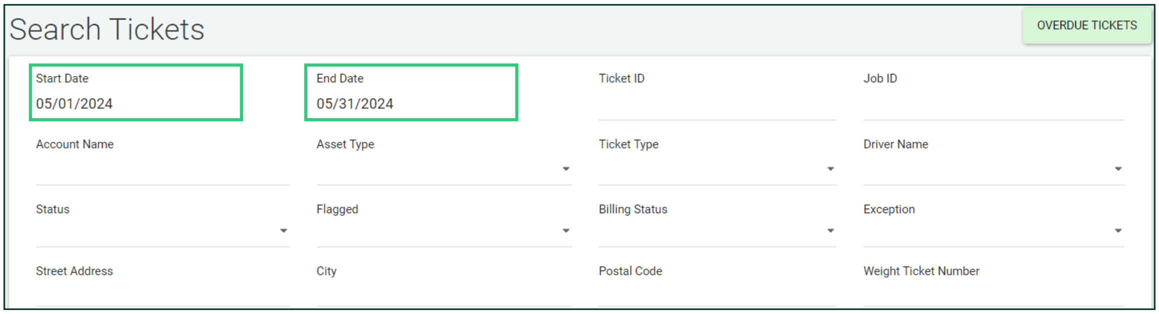
Report Total Weight per Sites

In order to report weight totals, ensure drivers are adding weight to tickets through Required Actions and administrators are adding Associated Sites to Tickets.

1. Click **Tickets**



2. Use the **Ticket Filter** to select a **Start Date** and **End Date**, along with any other desired fields

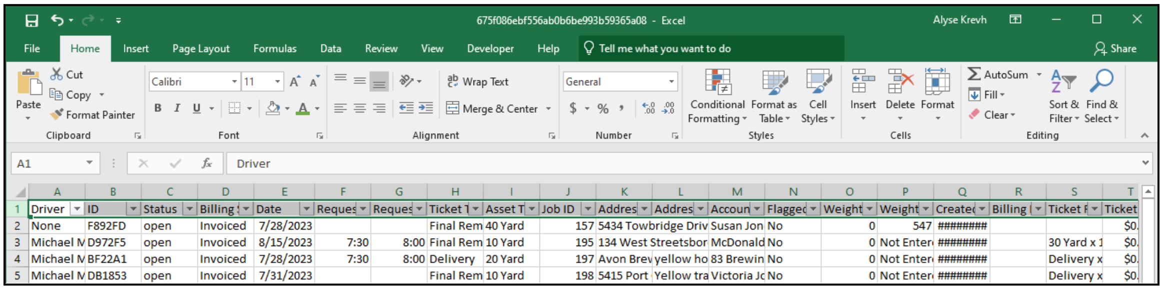


3. Click **Search**

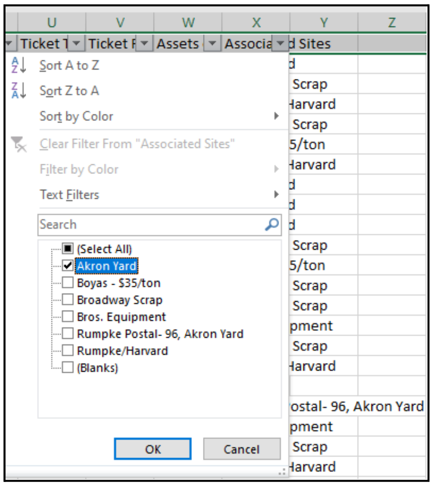
4. Click **Export**

Check your email for a link to download the report

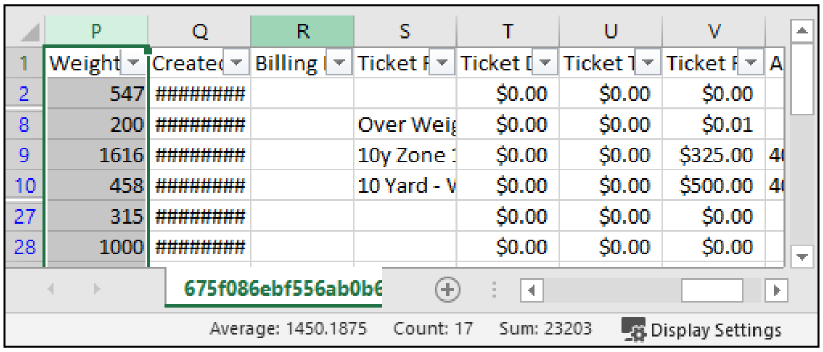
5. Add a **Filter** to **row 1**



6. Select an **Associated Site** in column X



7. Highlight the **weight** column to calculate the total weight



	P	Q	R	S	T	U	V	
1	Weight	Createc	Billing (	Ticket F	Ticket D	Ticket T	Ticket F	A
2	547	########			$0.00	$0.00	$0.00	
8	200	########		Over Weig	$0.00	$0.00	$0.01	
9	1616	########		10y Zone 1	$0.00	$0.00	$325.00	4(
10	458	########		10 Yard - V	$0.00	$0.00	$500.00	4(
27	315	########			$0.00	$0.00	$0.00	
28	1000	########			$0.00	$0.00	$0.00	

Glossary

Account - A unique company or customer that you do business with that houses all jobs, tickets, and invoices associated with it.
Asset - An individual rentable item that your company owns. If you don’t already, we recommend using a system to label your physical assets and use that as the Asset ID.
Asset ID - The unique label used for identifying your individual assets.
Asset Type - The name you use to categorize your assets.
Associated Site - One of your sites that you add to a ticket. For example, you may add a landfill to indicate to a driver where to dump a load.
Billing Status Fee Type - The typical line items you invoice customers for which includes a default dollar amount.- The description describing if an Invoice is Pending, Invoiced, Paid, or Not Billable.
Card Manager - A tool under each account to save and nickname credit cards, available with WastePay
Customer SMS - Enhance customer communication by enabling automatic SMS notifications to be sent when a ticket is created, started, or completed.
Dispatch - This is where you will see the map of where your dumpsters are located, if you have jobs that need assigned, you can assign them to your drivers.
Driver Assignment: Determine which users should appear in the Driver List Options
Fee Type - The typical line items you invoice customers for which includes a default dollar amount.
Invoices - This is where you can create invoices for customers. If you use QuickBooks Online, you can connect Dispatcher to export information from Dispatcher to QuickBooks.
Job - A unique address or location where the tickets will take place.
New Asset - The term used for adding new assets to your inventory within Dispatcher.
Pay Now Link: Invoice setting allowing your customers to pay securely online.
Required Actions - Configure specific steps that must be completed before a specific ticket type can be completed. Drivers will be prompted in the app to complete any outstanding actions upon trying to complete a ticket.
Requirement Options - Require driver to complete a ticket before starting the next one.
Site - A specific location drivers visit everyday that is not a job address, like a transfer station or landfill.
Site Disposal Cost - The amount of money per ton it costs to unload at a site.
Site Type - The category name you use to group all your sites. For example, landfills, container yards, or repair shops.
Status - The description describing if a Ticket is OPen, En Route, Completed, or Canceled.
Ticket - The action that takes place on a job.
Ticket Fee - The line item associated with a specific ticket that will carry over to a customer’s invoice.
Ticket Fee Description - Additional notes associated with Fee Types that will carry over to a customer’s invoice.
Ticket Type - The categories of actions taken on an asset. For example, with dumpsters you may want ticket types like “Drop Off,” “Swap Out,” or “Final Pickup.”
WastePay - payment processing solution to collect credit card charges in Dispatcher.