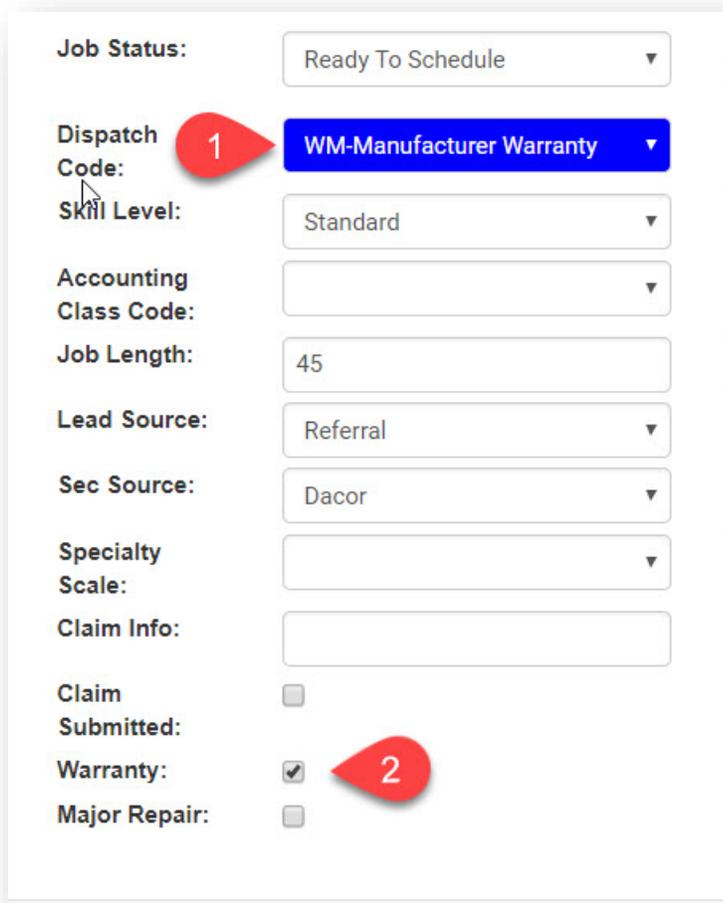


Monitor the Amount of Home & Extended Warranty as a Percentage of Jobs & Revenue & How to Setup Dispatch Codes

By Deborah McKenney

The Owner's Dashboard in SmartWare shows you the percentage of your jobs and revenue that is generated from *manufacturer* warranty. The percentages are derived from the work orders because the Warranty box on the work order is checked. When you select the Manufacturer Warranty dispatch code the Warranty box will automatically be checked. You would never check this box manually as it treats parts on the work order differently.



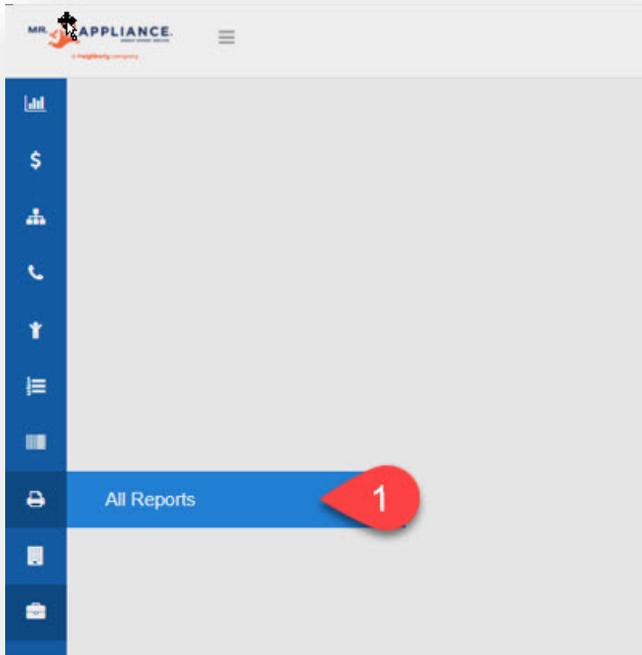
The image shows a screenshot of a form in SmartWare. The form contains several fields and checkboxes. A red callout bubble with the number '1' points to the 'Dispatch Code' dropdown menu, which is currently set to 'WM-Manufacturer Warranty'. Another red callout bubble with the number '2' points to the 'Warranty' checkbox, which is checked. The other fields in the form are: 'Job Status' (Ready To Schedule), 'Skill Level' (Standard), 'Accounting Class Code' (empty), 'Job Length' (45), 'Lead Source' (Referral), 'Sec Source' (Dacor), 'Specialty Scale' (empty), 'Claim Info' (empty), 'Claim Submitted' (unchecked), and 'Major Repair' (unchecked).

Job Status:	Ready To Schedule
Dispatch Code:	WM-Manufacturer Warranty
Skill Level:	Standard
Accounting Class Code:	
Job Length:	45
Lead Source:	Referral
Sec Source:	Dacor
Specialty Scale:	
Claim Info:	
Claim Submitted:	<input type="checkbox"/>
Warranty:	<input checked="" type="checkbox"/>
Major Repair:	<input type="checkbox"/>

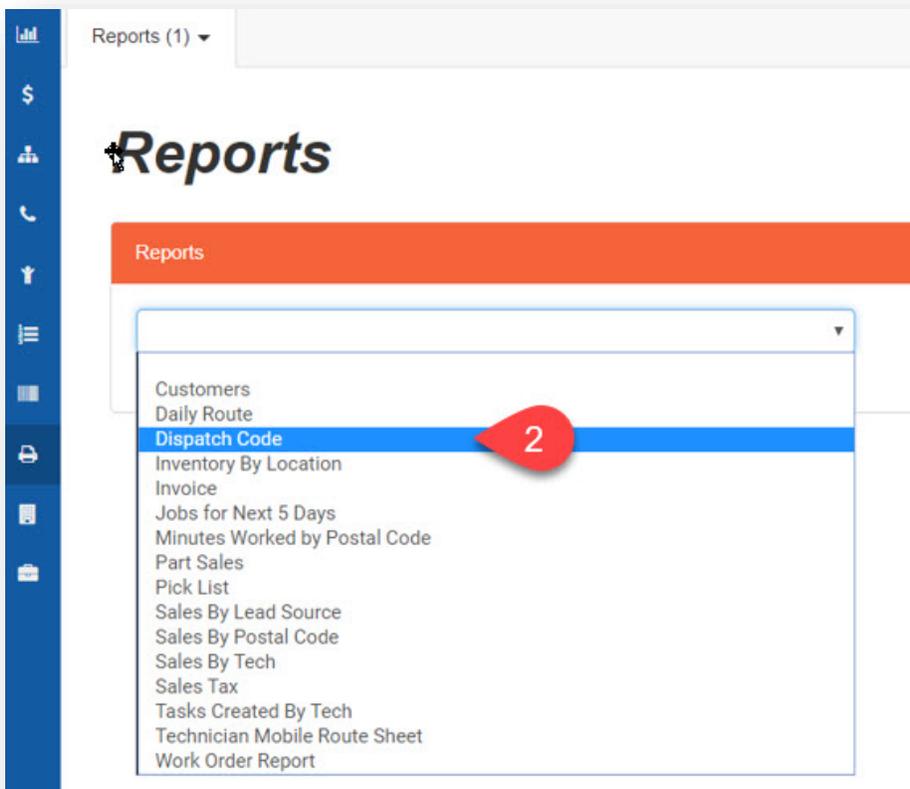
The Owner's Dashboard does not indicate the percentage of jobs and revenue done for extended or home warranty, but It is equally important to monitor how much of that work you're doing because it is inadvisable to do 20+% of any work coming from a single source. Doing too much work from any one source puts your company at risk should that source dry up and it *can* happen.

Here's where the Dispatch Code report in SmartWare comes into play. The report will show you the percentage of the work you are doing for each of the Dispatch Codes you use routinely in your office.

Click on Reports → All Reports



Select Dispatch Code report from drop-down menu



Enter desired date range and click Run Report button

Reports 4 [Run Report](#)

Dispatch Code

Begin: 01/01/2018 End: 07/24/2018 3

At the top of the report you will see the number of pages; in this case 84 pages. The first page is the summary page which shows the number of jobs, percentage of jobs, total revenue, percentage of revenue, and the job average for each dispatch code you use. The subsequent pages provide detail – a list of the work orders that fall into each dispatch code group. In this case you can see that this franchise is doing some extended warranty (EW) at the rate of 5.49% of jobs and 5.9% of revenue.

5 of 84 100%

Dispatch Code Report: 1/1/2018 to 7/24/2018

Job Type	# of Jobs	% of Jobs	Revenue	% of Revenue	Job Average
CB	371	13.22%	\$5,746.12	1.21%	\$15.49
COD	1896	67.55%	\$378,373.18	79.91%	\$199.56
COD W/D/R	80	2.85%	\$14,162.37	2.99%	\$177.03
CS	13	0.46%	\$317.81	0.07%	\$24.45
DVC	9	0.32%	\$1,439.90	0.30%	\$159.99
EW	154	5.49%	\$27,950.46	5.90%	\$181.50
MW	231	8.23%	\$24,503.00	5.18%	\$106.07
SHOP	6	0.21%	\$654.35	0.14%	\$109.06
SS	30	1.07%	\$14,594.67	3.08%	\$486.49
TIME	17	0.61%	\$5,731.90	1.21%	\$337.17
Total	2807	100.01%	\$473,473.76	99.99%	\$168.68

6

To download the report into an Excel spreadsheet, click on the print icon and select Excel from the drop-down menu.

Reports (2) ▾

1 of 84 100% 7

Dispatch Code Report: 1/1/2018 to 7/24/2018 8

Job Type	# of Jobs	% of Jobs	Revenue	% of Revenue	Job Average
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Excel
PDF
Word

I recommend monitoring home and extended warranty separately as they are very different types of warranty. If you do not have a Dispatch Code for both, here's how to add a Dispatch Code.

Go to Franchise Setup > Setup

Select Dispatch Codes from the Options drop-down menu

Franchise Options ▾

Name: Accounting Class Codes

Franchisee Name: Address

Franchise Consultant: Attachments

Primary Territory: Bank / CC Accounts

PBXFranchiseID: Communication

PBX Provider: Contract

Country: Disclaimers

Dispatch Codes

Employees

1

Click on plus sign (+) to add a new Dispatch Code

Dispatch Codes		
+	Abbreviation	Name
	Z-Unknown	
	COD	STANDARD CASH CALL
	D&I	DELIVERY & INSTALLATION
	FW	EXTENDED HOME WARRANTY

Setup the details for the Dispatch Code & Save. Note; Number 6 below – select **No** for extended and home warranty. It would only be Yes for manufacturer warranty only – remember, parts on the work order are handled differently for manufacturer warranty.

Dispatch Codes		9	Save	Discard
Abbreviation:	3	HW		
Name:	4	Home Warranty		
Skill Level:	5	Standard		
Warranty:	6	<input checked="" type="radio"/> No <input type="radio"/> Yes		
Specialty Scale:				
Background Color:	7			
		cyan		
Job Duration:	8	45		
Active:		<input checked="" type="checkbox"/>		
Service Types:				