


NOTE 2 READER: The following ½ page tip cards were printed back-to-back and given to participants at the close of their training session.

TEXT MESSAGES

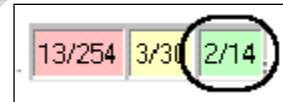
DA Quick Tip

To *open* the Message Summary window, you must be in the Tools menu. Then:


- ◆ Select **Text Message Summary**, *OR*

- ◆ Click the Text Messages window button,  *OR*

- ◆ Click in the green Text Message statistics box on the status bar.



To *send* a message:

1. Open the *Message* dialog box.
2. From the *Send* section, select a priority from a drop-down list.
3. In the *To* field, enter the user ID(s) of your recipients. Using the DA, one text message can be sent to multiple recipients.
4. In the text area, type your message.
5. Click **Send** or click the **Send** button. 
6. Click **Yes**.

FORECASTS

DA Quick Tip

A forecast is a prediction for the assignment of future orders.

To *run* a forecast:



1. From the Scheduling menu, click **Forecast** or click its button.
2. In the Resource Forecast dialog box, enter a date or click the down arrow to access the calendar.

To *view* a forecast:

1. From the Alerts menu, click **Event Summary**.
2. In the Alert Event Summary window, double click the alert that notifies you of the *forecast*.
3. Click **Yes** to transfer.
4. The report that corresponds to the alert appears in your default web browser.

CREATE AN ORDER

DA Quick Tip

Remember: An order should only be manually created if the host system (ex: CorDaptix, PITS) is down and the order will be an emergency.

To create an order, you must be in the Orders menu. Then:

1. Select **Create Order** and click the order type, *OR*



click the **Create Order** button.

2. Complete the *Create* form that will appear. More than one page may appear, in which case, you will need to click the corresponding tab at the bottom of each form.



3. Click the **Create** button in the upper left hand corner of the form.
4. Click **OK**.

CREATE A MISCELLANEOUS TICKET

DA Quick Tip

From time to time, a Miscellaneous ticket will need to be created.

To create a Miscellaneous ticket:

1. From the Orders menu, select **Create Order**.
2. Click **Order Entry To**.
3. Complete the *Create* form by entering information in each yellow filed (as it applies to the order).
4. Click the **Create** button.
5. Click **OK** when notified that the order had been created.

See back of card for the Create form.

CREATE A MISCELLANEOUS TICKET

DA Quick Tip

The *Create Order* form.

The screenshot shows a web-based form titled "CREATE A MISCELLANEOUS TICKET" with a "DA Quick Tip" subtitle. The form is divided into several sections, each with a bolded header. The "Order Information:" section includes fields for Job Code (set to "TurnOff-On Tu"), BU, Area, SubArea, Priority, and Originated. Below these are Date and Time fields, and Appt Start/End Time fields. The "Customer Information:" section includes Cust Name, Addr, Cust Phone, ext, X Street, Town, Call Ahead, Call Ahead Ph, ext, SubDiv, TWP, Mtr#, Lot, and Atlas. The "Leak Information:" section includes Leak Loc, Gas Blowing, and P/F on Site. The "Dispatching Instructions:" section includes Merc Reg. There are two large text areas at the bottom for additional information.

Order Information:
Job Code BU Area SubArea Priority Originated
Date Time
Job Appt Order Taken Appt Start Time Appt End Time

Customer Information:
Cust Name Addr
Cust Phone ext X Street Town
Call Ahead Call Ahead Ph ext SubDiv TWP
Mtr# Lot Atlas

Leak Information:
Leak Loc Gas Blowing P/F on Site

Dispatching Instructions: Merc Reg

Field Comments: