



## In this issue:

- Enter new jobs, customers, assign workers and even send quotes all from DSM Mobile!
- Changing assignments in the field
- Customer Account Merge is HERE!
- DSM Maintenance feature is a “Killer” – are you using it?
- Do not miss these DSM Enhancements



## 2020 Will Bring a Sharper Vision for DSM and our Customers

2019 was a pivotal year for many of our customers realizing that going completely electronic is achievable. We worked with many of our customers to make this a reality. For one, connectivity to DSM has been simplified without compromising security. You can connect anywhere with your laptop. We made big improvements to give you the on-the-go flexibility you need to get your quotes out, your new jobs in and your assignments made. Going PAPERLESS is not only ecological, it is efficient. Being able to manage your jobs and assignments from your office, car or literally anywhere keeps you in the know and in control. Having your photos, maintenance records, JSA forms, job tickets, and billing all connected, organized and electronic saves hundreds of hours of paper chasing, recording and error fixing a year.

While the technology has been here for several years now, its proliferation has now hit a critical mass. Everyone knows how to handle their favorite devices. Your employees can handle it and your younger employees expect it. 2020 will be a year where many of you get free from much of the daily physical paperwork and realize the benefits of having that data real time entered directly into your system. I can't tell you how many customers have been scanning job tickets for years to make sure they have easy and simple access to them. While I applaud this step, I look forward to them having that directly come from the field.

We are focused on continuing to innovate in 2020 to make your operation more efficient, easier to manage and ultimately more profitable. Let us know how you are doing and how we can help you.

Best Regards ~ **Charlie Warrell, President and CEO**

## DSM Maintenance Feature

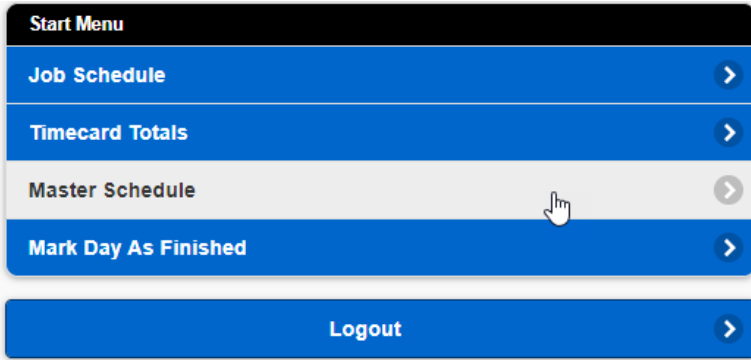
**Truck and equipment tracking and maintenance is a very powerful tool for maintaining your trucks and equipment.** If your trucks and equipment are defined in DSM you can create and track maintenance schedules, add scheduled or emergency service tickets, assign tickets to mechanics, track parts used and file PDFs of part orders, damage photos, and more. If you are using DSM Mobile and set up Truck or Equipment inspection forms any issues flagged in those forms will automatically create service tickets in the Shop Maintenance tab of your Scheduling screen. These can then be assigned and tracked. The following documents can help you become more familiar with this powerful feature. You can also email [support@peakinfo.com](mailto:support@peakinfo.com) or call 801-572-3570 x2 to schedule a free online training with one of our Technical Consultants.

[Setting up Truck Categories and Truck Definitions](#)

[Setting up Service Types/Categories and Trucks and Service tickets](#)

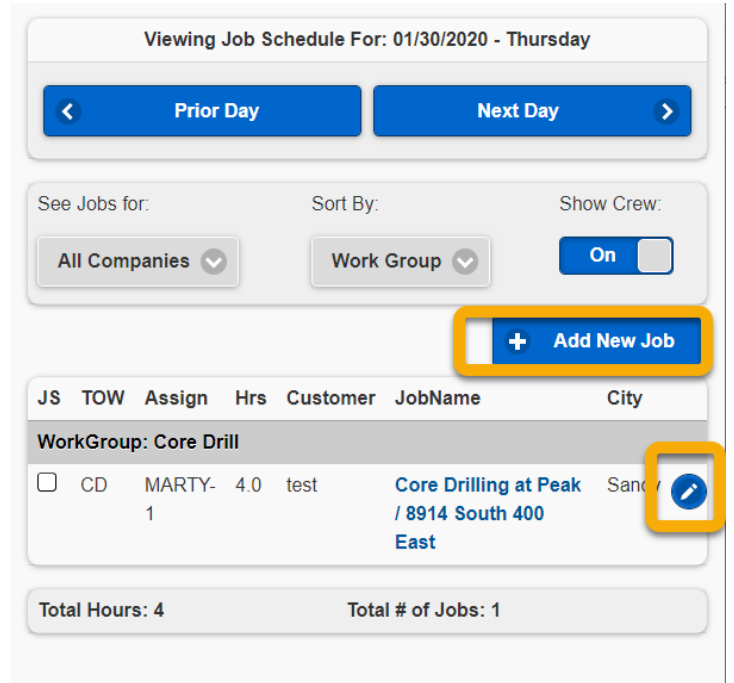
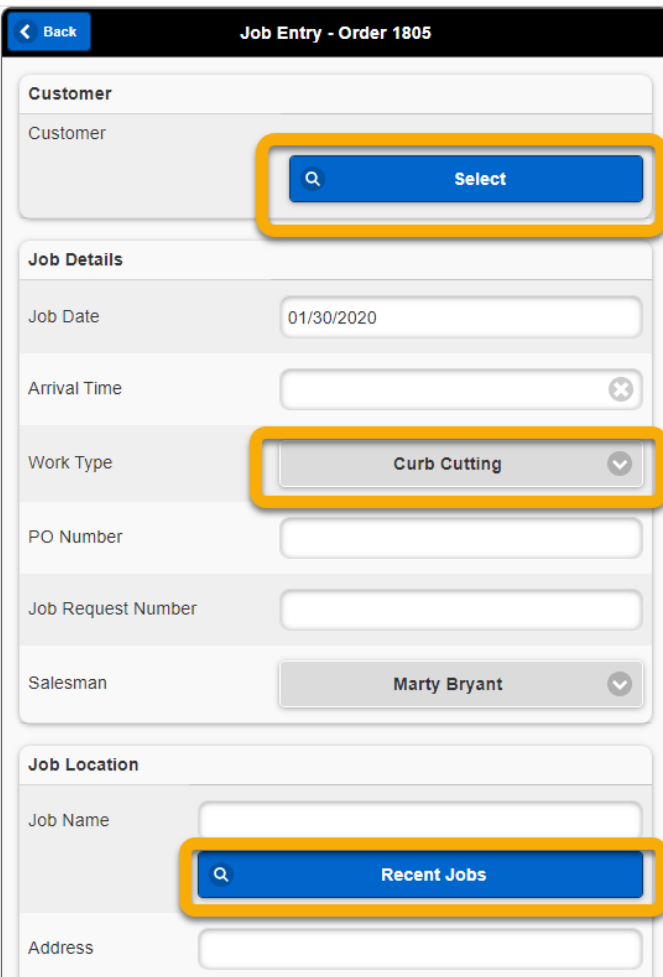
[Setting up Equipment Types and Maintenance Schedules](#)

# Adding Jobs, New Customers and Making Assignments – all via DSM Mobile



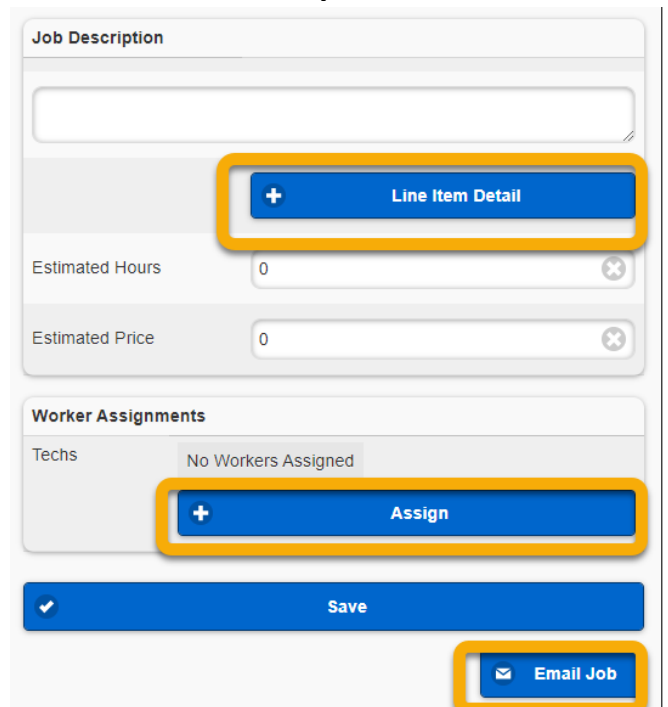
< DSM Users flagged as Manager can now add and edit jobs on the fly from the Master Schedule Screen.

> Filter your jobs by Company (for multi-company businesses) and filter by Work Group.



< The job entry screen allows you to select from existing or add a new customer, select work type, select recent jobs or add a new one.

Lower down you can add line items, assign workers and email the quote!



# Adding or Editing Assignments and Line Items with DSM Mobile

JS	TOW	Assign	Hrs	Customer	JobName	City
<b>WorkGroup: Core Drill</b>						
<input type="checkbox"/>	CD	KWOOD-1	16	test	<a href="#">Core Drilling at Peak / 8914 South 400 East</a>	Sandy

Total Hours: 16                          Total # of Jobs: 1



Selecting the Edit icon next to the Job will allow you to edit or add line item and add or change workers

**Job Description**

Qty	Description	Each	Price
6	Core Drilling	100.00	600.00
			Total \$ 600.00

Core Drilling work - 1/2 day

**+ Line Item Detail**

Estimated Hours:

Estimated Price: 600.00

**Worker Assignments**

Techs: KWOOD-1 JORDAN-1C BRANDEN-1C  
ANGIE-1C

**+ Assign**

**Save**

**Email Job**

You can also reassign Foreman on the fly!

Non-manager crew members can be allowed to re-assign Foreman from their access via DSM User Permissions

**Assign Workers**

Job Number:   Foreman

Job Number:   Foreman

Job Number:   Foreman

Job Number:   Foreman

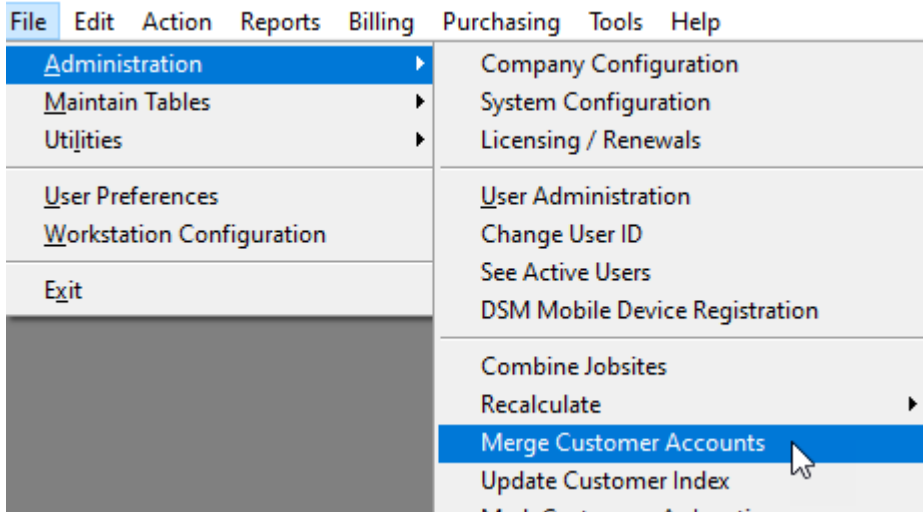
**+ Worker**

**Continue**

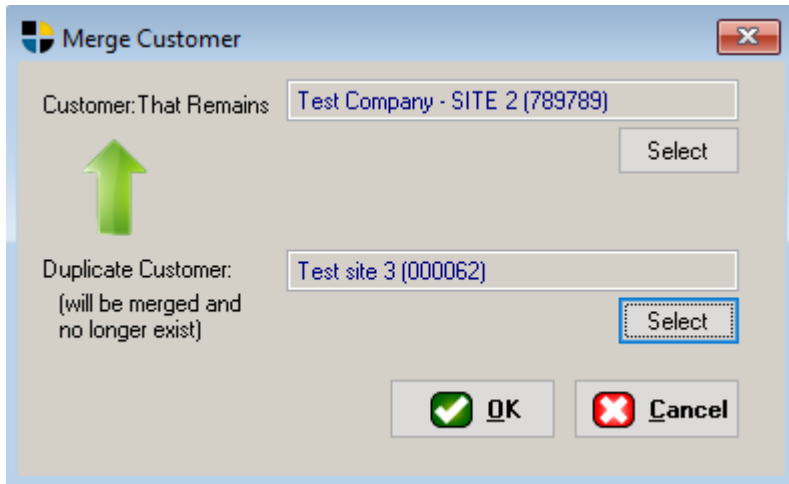
# Customer Account Merge is HERE!

We made it easier to solve your duplicate customer problem! The new Customer Account Merge utility will add all documents and merge contacts for you automatically!

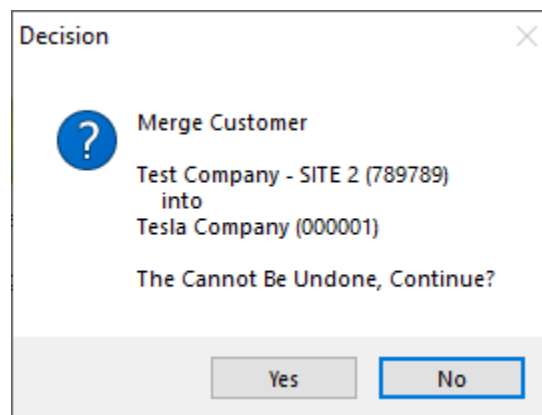
From the File>Administration menu select Merge Customer Accounts



The next screen allows you to select the primary account at the top (to which the information will go) and the secondary or duplicate account from the lower Select button



Double check your decision before clicking the confirmation screen!



## Fall 2019 Enhancements in Case You Missed Them!



**Be sure you are keeping your DSM SQL updated by downloading application updates for the latest features!**

**To check for updates follow File>Admin>Application Update>Check for Updates**

- **Customer Account Merge:** A new utility has been added under File / Administration / Merge Customers which allows you to combine 2 customers into 1. Use this utility with caution as once combine, accounts cannot be undone. You must be a system admin to do this.
- **Exporting to Excel:** DSM has been updated to allow export the Excel xlsx format. In addition, a new file picker interface has been added.
- **Print Job Tickets Report:** New filters were added to allow you to select by invoice, order, billing group or by customer or jobsite. In addition, a sort order was added to the report job which now outputs the reports in alphabetical (by customer) order then by work date.
- **Timecard Summary Report:** Option added to print the summary detail for each employee on a separate page.
- **Timecard Detail by Jobsite Report:** Filters added for state and city.
- **DSM Mobile:** Configuration change added which allows you to default the customer signoff to print when the invoice prints.
- **DSM Mobile:** New functionality added to allow a Manager to add or edit a job from the Master Schedule screen. The job entry is a light version of an order entry optimized for a small device such as a phone or tablet. Configuration options have been added to the Site Configuration Screen / DSM Mobile tab which allow you to enable or disable either of these features. By default, Order Entry is enabled but Customer entry is disabled.
- **DSM Mobile:** New functionality added to allow workers to change the foreman status. This is useful when the designated foreman leaves the job and one of the crew members needs to finish the job and paperwork. This is an optional setting where the default is not to allow this. It is set on the Configuration Screen / DSM Mobile tab and is called "Allow Techs to Reassign Foreman"
- **Spell Checker Selection:** Under Workstation Configuration, the spell checker dropdown will now validate the WSPELL module is installed before allowing it to be selected.
- **Timekeeping Details Report:** Filter added to select a specific customer. A filter was added to just select certified jobs.
- **Scanning Documents:** The ability to scan multiple documents using the Automatic Document Feeder (ADF) is now functional.