



# Instructions

Marlin

# Introduction

This manual describes the basic steps of working with the Marlin application.

With the Marlin planning and communication tool it is possible to plan service orders by a digital planning board and communicate about jobs with customers.

## Step 1:

Start a web browser and open <https://start.pcamobile.com>

AUTHENTICATE

Company:

Username:

Password:

Remember me:

☐

Password forgotten?

Login

## Step 2:

Login and open the Marlin application



## Overview Marlin

The screenshot displays the Marlin software interface, which is divided into five main sections:

- Resources (1):** A list of resources on the left side, including Erwin Hissink, FJ van den Bergh, FJT Heemskerk, MA Masseink, TR Melissen, B Polman, NV de Ruijter, C Rutgers, M Toet, and N el Yousofi. A red box highlights the name B Polman.
- Task details (2):** A table at the bottom showing task details. A red box highlights the task description "Batteries & Trickl...".
- Planboard (3):** A Gantt chart at the top showing task allocation over time (Monday 12 March to Friday 16 March). A red box highlights a task allocation for "VvE Ca...".
- Settings (4):** A settings panel on the right side, including options for Day and time, Display scheduler, Row height, Show extra allocation info, and Display tasklist. A red box highlights the "Day and time" section.
- Map (5):** A map on the bottom right showing the location of tasks. A red box highlights a location near "Amsterdam".

You can divide Marlin in five parts:

1. Resources
2. Task details
3. Planboard
4. Settings
5. Map

## Resources

You can sort the resources into region or skills.

It is also possible to add resources to a group, for example you can make a group per planner.

Region
Erwin Hissink
FJ van den Bergh
FJT Heemskerk
MA Masselink
TR Melissen
B Polman
NV de Ruijter
C Rutgers
M Toet
N el Yousoufi

Resource  
FJT Heemskerk

Skills  
Lift

## Task details

If you double click on an allocated task, details of this task are shown. After changing something confirm the changes with Save before Close. The first tab is Call and Task.

Unallocated		Own service	Tasks	Allocations								
Search...												
Code ↑	Planner	Refer...	Description	Task duration	Name (Relation)	Mobile (Re...	Adres	City	Name			
		fda	UMC Utrecht	01:00	UMC Utrecht		Heidelbergl...	UTRECHT	Drijve			
			UMC Utrecht	01:00	UMC Utrecht		Heidelbergl...	UTRECHT	T. Drij			
321793966		34093...	Herstel schacht...	16:00	AKZO Nobel Sassenheim		Rijksstraat...	Sassenheim	Onbe			
321796308		34094...	[KA] Bestek PLO...	99:00	Linker Rottekade 431-4...		Linker Rott...	Rotterdam	Onbe			
321797604		34094...	As en lagers verv...	24:00	VvE Strandstate Noord...		Zandbank ...	Noordwijk	Onbe			
321798656		34094...	Batteries & Trickl...	07:00	Hogewerf 125-223 Ams...		Hogewerf 1...	Amsterdam	P.F. V			
« < Page 1 of 86 > »												
<input checked="" type="checkbox"/> Add new tasks automatically												

New tasks added in **bold** in the unallocated tab.

## Call and task

At the left part you'll find the code and reference numbers. It is also possible to change the status of the task to a free task in this tab.

Call and task	Adres	Info	Planning constraints	Allocations	Planned materials	Notes	Documents	Registrations
<b>Identification</b> Nr 3681 <input type="checkbox"/> Free task Code 321798837 <input checked="" type="checkbox"/> Split allowed Reference 340944872 Company Company Task group Task group ▼			<b>Call</b> Caller name Name Contact Call intaker Mol Remco at 08/18/2017 00:00 Info			<b>Task</b> Duration 8:00 <input checked="" type="checkbox"/> Split on shifts end Description Supply and fit 2 replacement Kicker Roll Info Supply and fit 2 replacement Kicker Roll		
<div>Save Cancel Close</div>								

## Address

Address is the second tab of the individual task. This tab is divided in Relation, Address and Contactperson. The contactperson receives the confirmation e-mail.

Call and task	Adres	Info	Planning constraints	Allocations	Planned materials	Notes	Documents	Registrations
<b>Relation</b> Name De Kroon Den Haag Firstname Middlenarr Title Phone Phone Mobile Fax Email Email			<b>Adres</b> Zipcode 2511 GR Num Addi Street Lage Zand 14-252 City Den Haag Country 0 State			<b>Contactperson</b> Name Blom A. Middlenarr De he- Phone +31703 8803 +31639 1125 Fax Email a.blom@haagwonen.nl Jobtitle Username 3030333230303030304476394347		
<div>Save Cancel Close</div>								

## Info

It is possible to write down extra information at this tab for financial reporting.

Call and task	Adres	Info	Planning constraints	Allocations	Planned materials	Notes	Documents	Registrations												
<b>Info</b> + - Name Value			<b>Extra fields</b> <table border="1"><thead><tr><th>Name</th><th>Value</th></tr></thead><tbody><tr><td>Created On</td><td>18-08-2017</td></tr><tr><td>Net Value</td><td>€ 2497.00</td></tr><tr><td>Invoiced Value</td><td></td></tr><tr><td>Inventory nu...</td><td>L3 LR</td></tr><tr><td>Equipment</td><td>10984621</td></tr></tbody></table>			Name	Value	Created On	18-08-2017	Net Value	€ 2497.00	Invoiced Value		Inventory nu...	L3 LR	Equipment	10984621	<b>Contract</b> Code Start date Finish date Description Info		
Name	Value																			
Created On	18-08-2017																			
Net Value	€ 2497.00																			
Invoiced Value																				
Inventory nu...	L3 LR																			
Equipment	10984621																			
<div>Save Cancel Close</div>																				

## Planning constraints

In the second part of this tab you can describe in which period the job has to be executed. At the last part the region indicates which planner is responsible for the planning of this task. It's possible to add required skills, required resources and/or preferred resources for this task.

The screenshot shows the 'Planning constraints' tab with several sections: 'Appointment' with checkboxes for 'Appointment reached', 'Arrival' (From/Until), 'Departure' (Before), and a 'Remark' field; 'Period' with 'Allocation' dates (From: 09/14/2017, Until: 12/28/2017) and a 'Plan range' section with '+' and '-' buttons and a table for 'Plan range type', 'Start time', and 'Finish time'; and 'Resource' with 'Quantity' (1), 'Region' (Maurice Hakemu), 'Skills' (Lift), 'Required resources' (MJ Oosten), and 'Preferred resources'.

## Allocations

The allocations tab describes the history of the executed activities by planners.

## Planned materials

If there are materials required to execute the task, you can add these materials in the planned materials tab.

## Planproposal

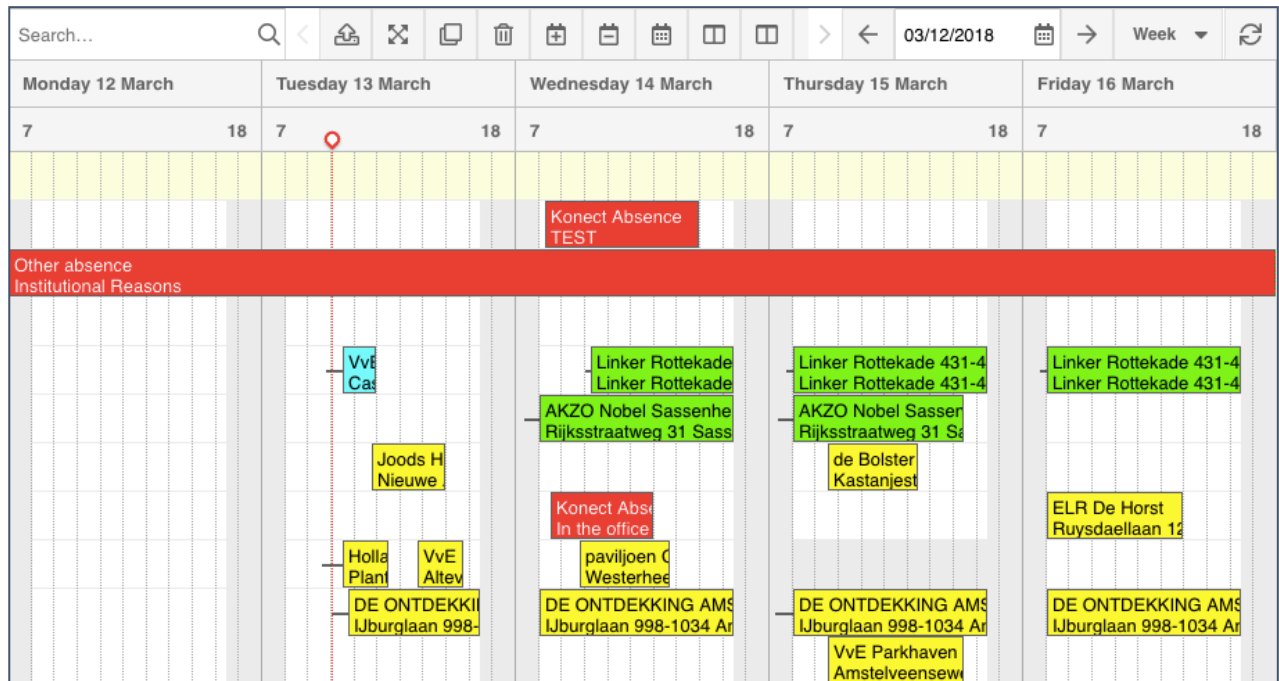
The screenshot shows the 'Planproposal' tab with a table of unallocated tasks. A 'View' dropdown menu is open, showing options: 'Planboard' (checked), 'Proposal window', 'Options', 'Apply availability filter' (checked), 'Apply existing filters' (checked), and 'Apply travel time' (checked). The table has columns: Code, Planner, Refer..., Descripti..., Duration, Name (Relation), Mobile (Re..., Adres, City, and Name. The bottom of the screen shows 'Page 1 of 86' and a checkbox for 'Add new tasks automatically'.

Code	Planner	Refer...	Descripti...	Duration	Name (Relation)	Mobile (Re...	Adres	City	Name
321797604		34094...	As en lag	24:00	VvE Strandstate Noord...		Zandbank ...	Noordwijk	Onbek
321798656		34094...	Batteries	07:00	Hogewerf 125-223 Ams...		Hogewerf 1...	Amsterdam	P.F. V
321798837		34094...	Supply ar	08:00	De Kroon Den Haag		Lage Zand ...	Den Haag	A. Blo
321798838		34094...	Job 1 - In	07:00	De Kroon Den Haag		Lage Zand ...	Den Haag	A. Blo
321798847		34094...	Job 1 - In	06:00	VvE Parkhaven Amster...		Amstelvee...	Amsterdam	Onbek
321798861		34094...	Joint atte	04:00	paviljoen Odion		Westerhee...	Heemskerk	F. Koe

There are 3 ways to plan unallocated tasks:

1. Proposal window: best fit (gold, silver, bronze)
2. You will automatically receive a proposal to plan the unallocated tasks in the planboard.
3. Drag a task to the planboard

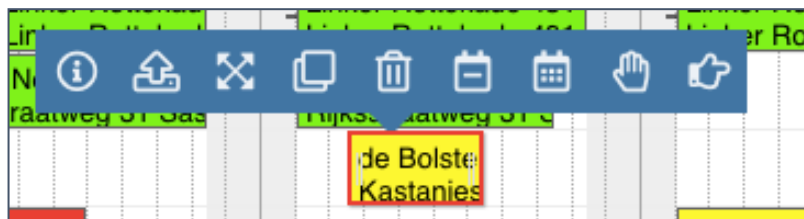
## Planboard



### Allocated task

Select an unallocated task from the task details tab and drag this task to a preferred point of time and technician. The allocated task will turn yellow in the planboard. At the end of each day the allocated tasks will automatically be planned and will get the green status.

### "Toolbox"



If you select a task in the planboard a 'toolbox' will be showed. With these tools it's possible to perform actions concerning this task.

### Commit



An e-mail is send to the fitter as well to the customer, as soon as the task is committed. The task will become green in the planboard once committed.

### Duplicate



This button allows you to duplicate the task, in case you need to plan this task for two fitters instead off one.

### Delete



Click on delete if you want to delete the planning of this task

### Reserve



You can reserve the task in the planboard by clicking on the reserve button. The task will become blue in the planboard once reserved.

### Recall



Click on the button above to recall a task. The task will become yellow once again. In case you recall a certain task, an e-mail is send to the fitter and the customer.

### Blockades

It's possible for a planner to make a blockade for a technician to "mouseclick" and then select the length of time or period. In case the location of the blockade is known, for example the address of the dentist, the travel time to the next location is known.



## Settings

Each planner can personalize his own environment based on his personal preference, except the colors of the Legend.

Settings

Day and time

Visible days

☒ Monday

☒ Tuesday

☒ Wednesday

☒ Thursday

☒ Friday

☐ Saturday

☐ Sunday

Visible hours

Display scheduler

+

Display taskslist

+

Planning constraints

+

Legend

+

Legend

Status

New

Allocated

Reserved

Committed

Available

Travel

Interrupted

Started

Finished

Unfinished

Rejected

Day and time

Display scheduler

Row height

Show extra allocation info

☒ Visits

☒ Travelttime

☒ Scheduled by customer

☒ Scheduled by resource

☒ Inside appointment

☒ Outside appointment

☐ Outside plan period

☒ Outside skill

Show tooltip

☒ Resource

☐ Resource group

☒ Task

☒ Blockade

☐ Activity

Show task information

Display taskslist

+

Planning constraints

+

Legend

+

Display taskslist

Options

☒ Plan proposal

Action menu

☒ Enabled

☒ Output

☒ Show task

☒ Show allocation

☒ Assign planner

☒ Remove planner?

☒ Remove task

☒ Recall

☒ Reserve

☒ Commit

☒ Remove

Planning constraints

+

Legend

+

## Maps

Marlin Maps facilitates the map on which the location of the task (s), technician (s), and route (s) traveled is displayed. When the planner asks for a plan proposal, the travel time can be taken into account.

Optimization will be facilitated, allowing the optimal route to be generated per resource for scheduled tasks per working day, taking into account travel times and distances.

