



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>

A screenshot of a web-based login form titled "AUTHENTICATE". The form includes fields for "Company" (with the value "I" highlighted), "Username", "Password", and a "Remember me" checkbox. Below the form are links for "Password forgotten?" and a "Login" button.

Step 2:

Login and open the Marlin application



Overview Marlin

The screenshot displays the Marlin software interface with the following sections:

- Section 1:** Resources (Employee list) on the left side.
- Section 2:** Task details (Task list) below the resources.
- Section 3:** Planboard (Gantt chart) showing tasks across five days (12-16 March) with various resource assignments and status indicators (e.g., red boxes for absences).
- Section 4:** Settings (Scheduler settings) on the right side, including a "Display scheduler" panel with checkboxes for various display options.
- Section 5:** Map (Map view) showing a geographical area with cities like Amsterdam, Utrecht, and Rotterdam.

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.

The screenshot shows a list of resources under a category named 'Erwin Hissink'. The resources listed are: FJ van den Bergh, FJT Heemskerk, MA Masselink, TR Melissen, B Polman, NV de Ruijter, C Rutgers, M Toet, and N el Yousoufi. A context menu is open over the entry for 'FJT Heemskerk', displaying two options: 'Resource' (with icon of a person) and 'Skills' (with icon of a wrench).

Task details

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

The screenshot displays a task management interface with several tabs at the top: 'Unallocated', 'Own service', 'Tasks', and 'Allocations'. The 'Tasks' tab is active, showing a list of tasks. The columns include: Code, Planner, Reference, Description, Task duration, Name (Relation), Mobile (Re...), Adres, City, and Name. Below the table, there are navigation controls for pages and a checkbox for 'Add new tasks automatically'.

Code ↑	Planner	Refer...	Description	Task duration	Name (Relation)	Mobile (Re...)	Adres	City	Name
	fda	UMC Utrecht		01:00	UMC Utrecht		Heidelbergl...	UTRECHT	Drije
		UMC Utrecht		01:00	UMC Utrecht		Heidelbergl...	UTRECHT	T. Drij
321793966	34093...	Herstel schachtd...		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 & Trick...		07:00	Hogewerf 125-223 Ams...		Hogewerf 1...	Amsterdam	P.F. V

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	Print
Identification Nr 3681 <input type="checkbox"/> Free task Code 321798837 <input checked="" type="checkbox"/> Split allowed Reference 340944872 Company Company Task group Task group		Call Caller name Name Contact Call intaker Mol Remco at 08/18/2017 00:00 Info		Task 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						
<input type="button" value="Save"/> <input type="button" value="Cancel"/> <input type="button" value="Close"/>										

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	Print
Relation Name De Kroon Den Haag Fname Middlenarr Title Phone Phone Mobile Fax Email		Adres Zipcode 2511 GR Num Addi Street Lage Zand 14-252 City Den Haag Country 0 State		Contactperson Name Blom A. Middlenarr De he Phone +31703 8803 +31639 1125 Fax Email a.blom@haagwonen.nl Jobtitle Jobtitle Username 3030333230303030304476394347						
<input type="button" value="Save"/> <input type="button" value="Cancel"/> <input type="button" value="Close"/>										

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	Print																	
Info <table border="1"> <tr> <td>+ -</td> <td></td> </tr> <tr> <td>Name</td> <td>Value</td> </tr> <tr> <td colspan="2"></td> </tr> </table>		+ -		Name	Value			Extra fields <table border="1"> <tr> <td>Name</td> <td>Value</td> </tr> <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> </table>		Name	Value	Created On	18-08-2017	Net Value	€ 2497.00	Invoiced Value		Inventory nu...	L3 LR	Equipment	10984621	Contract Code Start date Finish date Description Info					
+ -																											
Name	Value																										
Name	Value																										
Created On	18-08-2017																										
Net Value	€ 2497.00																										
Invoiced Value																											
Inventory nu...	L3 LR																										
Equipment	10984621																										
<input type="button" value="Save"/> <input type="button" value="Cancel"/> <input type="button" value="Close"/>																											



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 his task.

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

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

Search... Search icon Back icon Home icon Filter icon Print icon Delete icon Calendar icon Week icon Day icon Today icon Forward icon Left icon Right icon Week dropdown Refresh icon

Monday 12 March	Tuesday 13 March	Wednesday 14 March	Thursday 15 March	Friday 16 March
7	18	7	18	7
	●			
Konect Absence TEST				
Other absence Institutional Reasons				
	VvE Cadzand Joods Huis Nieuwegein Hollandsche Plantsoen VvE Alteveld DE ONTDEKKING AMS IJburglaan 998-1034 Ar	Linker Rottekade Linker Rottekade AKZO Nobel Sassenheim Rijksstraatweg 31 Sassenheim paviljoen Oosterheem DE ONTDEKKING AMS IJburglaan 998-1034 Ar	Linker Rottekade 431-4 Linker Rottekade 431-4 AKZO Nobel Sassenheim Rijksstraatweg 31 Sassenheim de Bolster Kastanjes DE ONTDEKKING AMS IJburglaan 998-1034 Ar	Linker Rottekade 431-4 Linker Rottekade 431-4 ELR De Horst Ruysdaellaan 12 DE ONTDEKKING AMS IJburglaan 998-1034 Ar

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

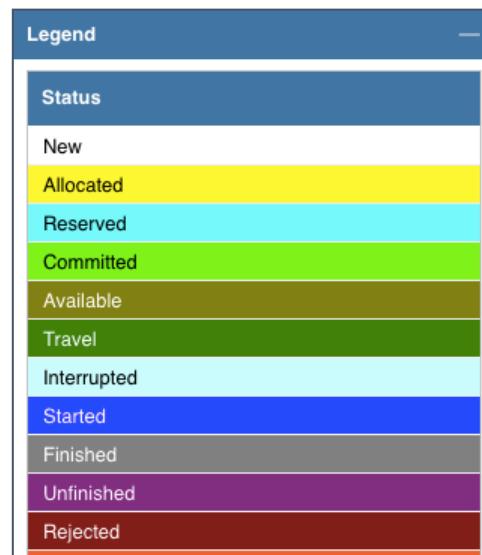
Visible hours

Display scheduler

Display taskslist

Planning constraints

Legend



Day and time

Display scheduler

Row height

Show extra allocation info

- Visits
- Traveltime
- 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.

