



Environmental
Products and Services Ltd

Award Winning Technology

Environmental Products and Services Ltd

How To Manage Weekend, Holiday, and Night
Cover

Table Content

- Introduction3
- How To Create a New Job Sheet.....4-7
- How to reschedule a job.....8-9
- How To Manage Field Technician Weekend Cover.....10
- How To Manage Field Technician Holiday Cover.....11
- How To Manage Field Technician Weekend Cover12
- Plan In Advance13
- Consider Rotating Shifts14
- Offer Incentives15
- Ensure Proper Training.....16
- Provide Adequate Resources.....17
- Communicate Effectively.....18

How To Manage Weekend, Holiday, and Night Cover Introduction

Welcome to the How to Manage Weekend, Holiday, and Night Cover Introduction Guide. This guide aims to assist you in optimizing your staffing needs effectively. In this document, we will explore how you can use Clikjobs software to manage your staffing requirements efficiently.

One of the essential tools that we'll discuss is creating a job sheet. A job sheet is a valuable tool that can help you keep track of your staffing requirements, enabling you to manage your workforce efficiently. We'll provide you with useful tips on how to create a job sheet that best fits your needs.

In the event of emergency callouts or the need to reschedule a previous job to a field technician, we've included the appropriate protocol on how to reschedule a job effectively. This will help ensure that you can quickly and efficiently manage any unexpected situations that may arise.

In addition to software-based solutions, we've included broader strategies that can help you optimize your staffing requirements. These strategies include planning in advance, considering rotating shifts, offering incentives, ensuring proper training, providing adequate resources, and communicating effectively.

By implementing these strategies, you can effectively manage your staffing needs, minimize downtime, and maximize productivity. We hope this guide proves useful in optimizing your workforce management.

How To Create a New Job Sheet using Clikjobs

Login: First, log in to Clik Service with your username and password. Navigate to the Jobs module at the top of the page:

1. Click on the 'CRM' tab to open the jobs module.
2. Select the name of the customer.
3. Click on the 'Activity' button
4. select 'Jobsheets
5. Click on 'New' then 'New Job Template' to create a new job.

The screenshot displays the Clik Service v4.2 build 344 interface. The top menu bar includes 'File', 'Settings', 'Modules', 'Tools', 'Reporting', 'Window', and 'Help'. The main navigation bar contains 'Comms', 'CRM', 'Sales', 'Quotes', 'Diary', 'Jobs', 'Invoices', 'Products', 'Projects', and 'Contracts'. The 'CRM' tab is selected, indicated by a red arrow and a '1' in a circle. Below the navigation bar, there are buttons for 'Refresh', 'New', 'Save', 'Cancel', and 'Delete'. The main content area shows a 'Company List - Searching by Name' with a search box and a list of customers. The customer '(DD) Abbey River Investments Ltd T/A Queens Hotel' is selected, indicated by a red arrow and a '2' in a circle. Below the company list, there are tabs for 'Details', 'Notes', 'Activity', 'Contacts', 'Sites', 'Diary', 'Communication History', 'Documents', 'Financial', 'Rates', 'Visual', and 'Qualifications'. The 'Activity' tab is selected, indicated by a red arrow and a '3' in a circle. Below the tabs, there are buttons for 'Quotes', 'Sales Orders', 'Jobsheets', 'Sales Invoices/Credits', 'Projects', 'Contracts', 'Contract Visits', and 'Incidents and Enquiries'. The 'Jobsheets' tab is selected, indicated by a red arrow and a '4' in a circle. Below the tabs, there are buttons for 'New', 'Delete', 'Refresh', 'Plan Job Route', and 'Export'. The 'New' button is clicked, opening a dropdown menu with options 'New' and 'New Job from Template'. The 'New Job from Template' option is selected, indicated by a red arrow and a '5' in a circle. Below the dropdown menu, there is a table with columns: 'P...', 'Clou...', 'J...', 'E...', 'Site', 'Title', 'Inv...', 'Or...', 'C...', 'Sta...', 'H...', 'Respo...', 'Emai...', 'Post...', and 'Profit'. The table contains one row of data: 'PPM Availa...', '20...', '2...', '2...', 'Abb...', 'Queen...', 'PP...', 'Mai...', 'Com...', '1...', '£...', '0d -1h -...', 'Y95 X...', and '£9.00'.

After you click 'New Job Template' a pop-up will appear:

6. Select the Job Title you would like to apply.

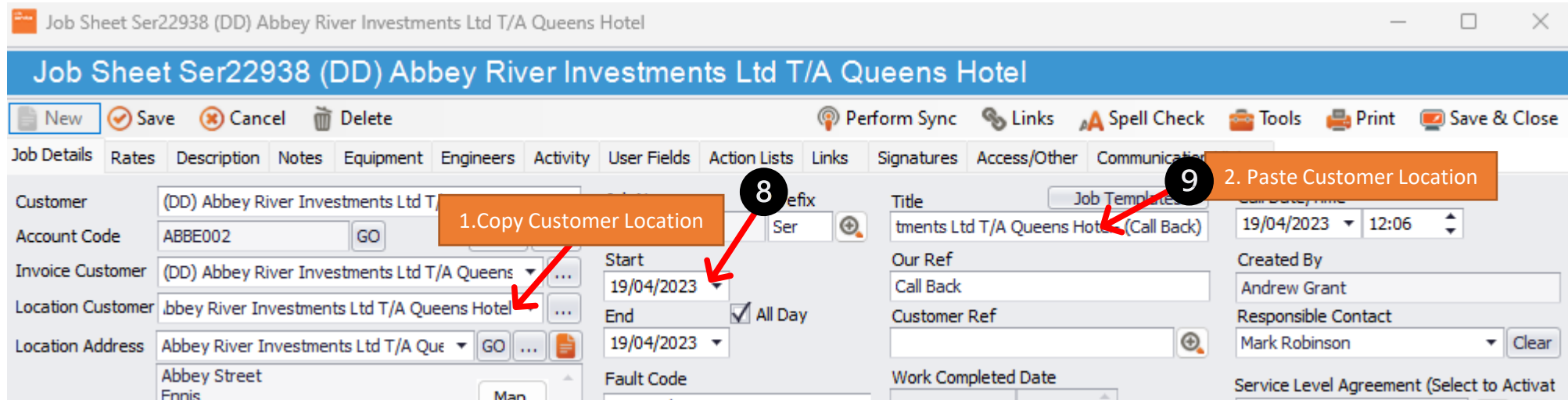
7. Select Create Job.

The screenshot shows the 'Job Templates' application window. The window title is 'Job Templates'. The menu bar includes 'New', 'Save', 'Cancel', and 'Delete'. The left sidebar is titled 'Title' and lists several job titles: 'Call Back', 'Van Check - Stockport', 'Collection of Grease Guardian and return t...', 'Training', 'Customer Service Questionnaire', 'Installation', 'Vehicle Health Check', 'Service Callout', 'Commission Unit', 'Warranty', and 'Maintenance Contract'. The 'Call Back' title is selected and highlighted in blue. A red arrow with a black circle containing the number '6' points to this selection. The main area of the window is titled 'Job Details' and contains several fields: 'Prefix' (Ser), 'Title' (Call Back), 'Responsible Contact' (empty), 'Fault Code' (P2 - Medium Priority), 'Our Ref' (Call Back), 'Status' (Complete), 'Category' (Call Back), 'Customer Ref' (empty), 'Service Level Agreement (Select to Active)' (Awaiting Allocation), and 'Default print template' (EPAS updated job template). At the bottom of the window, there are two buttons: 'Create Job' and 'Cancel'. A red arrow with a black circle containing the number '7' points to the 'Create Job' button.

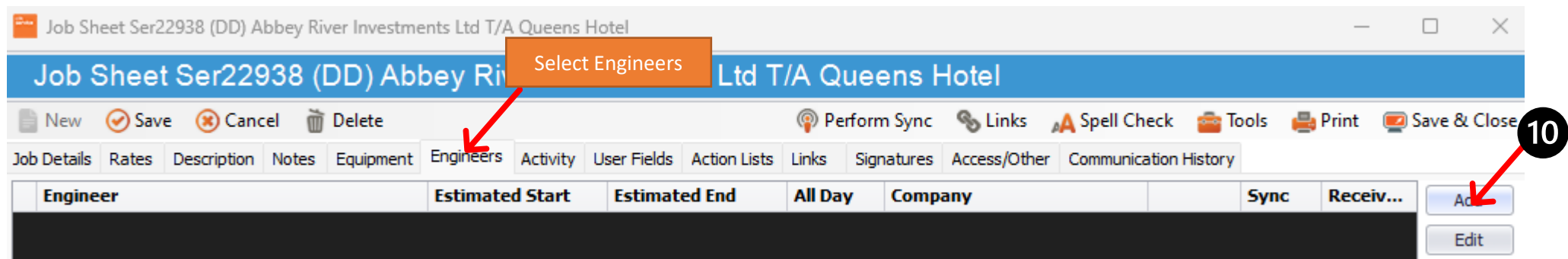
After you select 'Create Job' a pop-up will appear:

8. Select the date you would like the job the start.

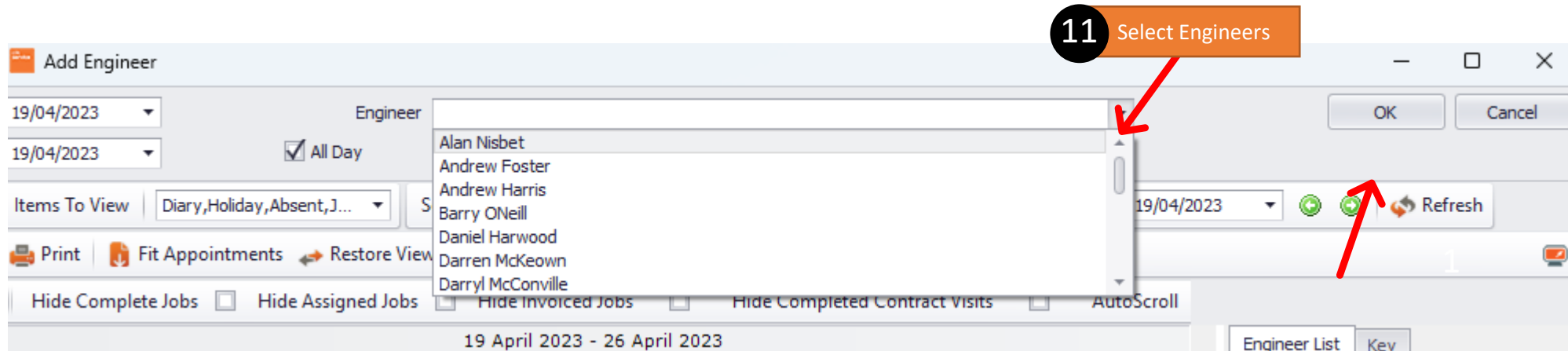
9. Copy the customer's location and add it to the Titles description as seen in the diagram below.



10. Select 'Engineers' and click 'Add'

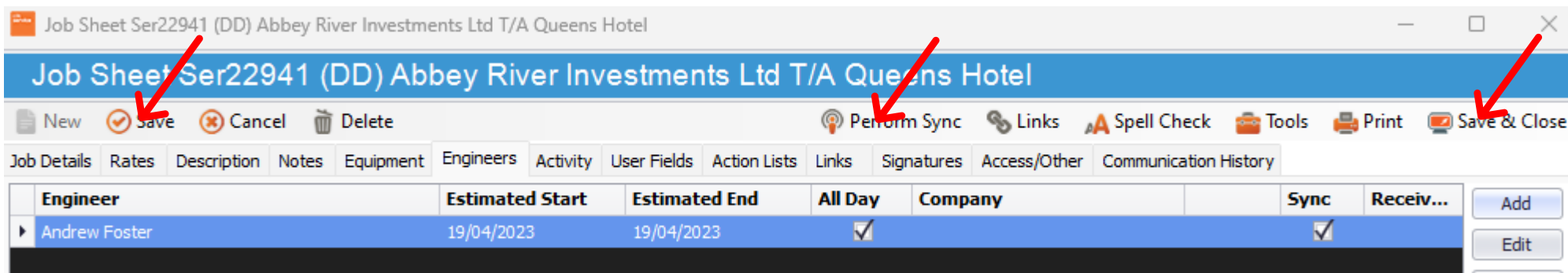


11. Click the 'Engineer' dropdown box and select which technician you would like to schedule for the job. After you select your technician click 'OK'



After selecting 'OK' you will be brought back to the previous module with the selected engineer appearing below.

12. To save your settings simply follow this sequence: 'Save', then 'Perform Sync', and finally 'Save & Close'.



How To Reschedule a Job

In the event of emergency callouts and the need to reschedule a previous job to a field technician, please follow the appropriate protocol. Firstly, inform the customer of the emergency callout and discuss what date suits them. Log in to Klik Service with your username and password. Navigate to the Jobs module at the top of the page.

1. Select the job you would like to reschedule.
2. Select 'Activity' and Then 'Jobsheets' on the selected job.
3. Below double click the job you would like to reschedule.

The screenshot shows the Klik Service v4.2 software interface. The main window displays a search results table for jobs. The first step (1) is to select a job from the list. The second step (2) is to click on the 'Jobsheets' tab in the navigation menu. The third step (3) is to double-click on a job row in the table to open its details.

Name	Post/Zip Code
> GreaseShield Serial N...	BT35 6JQ
> GreaseShield (Test)	BT35 6EE
1 Call Engineers	PA7 5PA
1 Connect Ltd	WA13 9SX
1 Indus LTD	BA1 5LN
1826 Adare	
1826 Restaurant	
21 Social	BT1 2LA
2r1 Limited T/A German...	HA4 6QS
33 Plus More Ltd T/A T...	
3D G Bire	PR6 0BL
4550 Miles From Delhi	NG1 6HE

P...	Clou...	J...	...	E...	Site	Title	Inv...	O...	C...	Sta...	H...	Respo...	Emai...	Post...	Profit
					New...	New Jo...				Sche...							BT35 ...	£145.00
					New...	New Jo...				Com...							BT35 ...	£145.00
					EPA...	New Jo...				Com...							BT35 ...	£145.00
					EPA...	New Jo...				Cal... In Pr...							BT35 ...	£145.00
					EPA...	New Jo...				Sche...							BT35 ...	£145.00

4. To update the dates, simply select the current date and replace it with the new date.

5. To save your settings simply follow this sequence: 'Save', then 'Perform Sync', and finally 'Save & Close'.

The screenshot shows a software window titled "Job Sheet 2834 > GreaseShield (Test)". The interface includes a menu bar with options: New, Save, Cancel, Delete, Perform Sync, Links, Spell Check, Tools, Print, and Save & Close. Below the menu bar are tabs for Job Details, Rates, Description, Notes, Equipment, Engineers, Activity, User Fields, Action, Links, Signatures, Access/Other, and Communication History. The main area contains fields for Customer (>GreaseShield (Test)), Account Code (GREAO11), Invoice Customer (>GreaseShield (Test)), Location Customer (>GreaseShield (Test)), and Location Address (Newry Address, 15 Shepherd's Way, Carnbane Industrial Estate, Newry, Co. Down, BT35 6EE). Other fields include Job No (2834), Title (New Job ...), Call Date/Time (04/09/2020 16:54), Created By (Gisele Da Silva), Responsible Contact, and Service Level Agreement. A calendar pop-up is open over the Start date field (04/09/2020), showing the current date (19 April 2023) and a calendar for September 2020. Red arrows point to the Save button (labeled 5), the Perform Sync button, the Save & Close button, and the Start date field (labeled 4).

How To Manage Field Technician Weekend Cover

Managing field technician weekend cover using Clikjobs software involves the following steps:

1. **Schedule Weekend Cover:** In the Clikjobs software, you can create a schedule for the weekend cover by selecting the field technician who will be on-call for that particular weekend. You can also assign a backup technician in case the primary technician is unavailable.
2. **Create Job Sheets:** Before the weekend shift, create job sheets for the tasks that the field technician will be handling. Job sheets provide detailed information about the job, including its location, customer details, and job requirements. These job sheets can be easily accessed by field technicians through the Clikjobs app on their mobile devices.
3. **Assign Tasks:** Once the job sheets are created, you can assign specific tasks to the field technician. This helps to ensure that the technician is aware of their responsibilities and can complete the job efficiently.
4. **Track Progress:** Clikjobs software allows you to track the progress of the job in real-time. You can see when the field technician starts the job, the tasks completed, and the estimated time of completion. This helps to ensure that the job is progressing smoothly and that the customer's needs are being met.
5. **Communicate Effectively:** Communication is crucial in managing field technician weekend cover. With Clikjobs software, you can communicate with the field technician through the app, ensuring that they have all the information they need to complete the job successfully.
6. **Provide Adequate Resources:** It is essential to ensure that the field technician has access to all the necessary resources to complete the job efficiently. This includes tools, equipment, and any required parts.
7. **Offer Incentives:** Providing incentives for weekend work can motivate field technicians to be more productive and efficient. In Clikjobs software, you can set up an incentive system to reward technicians who perform well during weekend cover.

How To Manage Field Technician Holiday Cover

Managing field technician holiday cover using Klikjobs software involves the following steps:

1. **Identify the Holiday Period:** The first step is to identify the period for which the field technician will be on holiday. This can be done by checking the technician's holiday requests in the Klikjobs software.
2. **Find a Replacement:** Once the holiday period is identified, the next step is to find a replacement technician. The Klikjobs software allows you to search for available technicians based on their availability, skills, and location. You can also assign a backup technician in case the primary technician is unavailable.
3. **Create Job Sheets:** Before the holiday period, create job sheets for the tasks that the replacement technician will be handling. Job sheets provide detailed information about the job, including its location, customer details, and job requirements. These job sheets can be easily accessed by the replacement technician through the Klikjobs app on their mobile device.
4. **Assign Tasks:** Once the job sheets are created, you can assign specific tasks to the replacement technician. This helps to ensure that the technician is aware of their responsibilities and can complete the job efficiently.
5. **Track Progress:** Klikjobs software allows you to track the progress of the job in real-time. You can see when the replacement technician starts the job, the tasks completed, and the estimated time of completion. This helps to ensure that the job is progressing smoothly and that the customer's needs are being met.
6. **Communicate Effectively:** Communication is crucial in managing field technician holiday cover. With Klikjobs software, you can communicate with the replacement technician through the app, ensuring that they have all the information they need to complete the job successfully.

How To Manage Field Technician Night Cover

Managing field technician night cover using Clikjobs software involves the following steps:

1. **Schedule Night Cover:** In the Clikjobs software, you can create a schedule for the night cover by selecting the field technician who will be on-call for that particular night. You can also assign a backup technician in case the primary technician is unavailable.
2. **Create Job Sheets:** Before the night shift, create job sheets for the tasks that the field technician will be handling. Job sheets provide detailed information about the job, including its location, customer details, and job requirements. These job sheets can be easily accessed by the field technician through the Clikjobs app on their mobile device.
3. **Assign Tasks:** Once the job sheets are created, you can assign specific tasks to the field technician. This helps to ensure that the technician is aware of their responsibilities and can complete the job efficiently.
4. **Track Progress:** Clikjobs software allows you to track the progress of the job in real-time. You can see when the field technician starts the job, the tasks completed, and the estimated time of completion. This helps to ensure that the job is progressing smoothly and that the customer's needs are being met.
5. **Communicate Effectively:** Communication is crucial in managing field technician night cover. With Clikjobs software, you can communicate with the field technician through the app, ensuring that they have all the information they need to complete the job successfully.

Plan In Advance

Schedule staff members in advance to ensure you have enough to cover the weekend, holiday, and night shifts. This will also give your staff members ample time to plan their personal lives around their work schedules.

1. Look at your sales data, customer traffic patterns, and historical data for the weekend, holiday, and night shifts to determine how many staff members you need to schedule.
2. Create a template for your schedules that includes the shifts you need to fill, the days of the week, and the times of the shifts. This will help you fill in the schedule easily each week.
3. Communicate with staff and notify them of the upcoming weekend, holiday, and night shifts well in advance so they can plan their personal lives accordingly.
4. Collect information from staff about their availability for the upcoming weekend, holiday, and night shifts. Use this information to create a schedule that meets the needs of the business while accommodating the needs of the staff.
5. Use the information you've collected to create a schedule that ensures you have enough staff to cover the shifts.
6. Post the schedule in a visible location so that all staff members can see when they are scheduled to work.
7. Follow up with the staff members to ensure they are aware of their upcoming shifts and have no scheduling conflicts.

Consider Rotating Shifts

Consider rotating shifts: Rotating shifts among staff to ensure that everyone has an equal chance to work the more desirable shifts. This also ensures that staff gets a break from working the same shift constantly.

1. Determine the number of shifts to rotate: Decide on the number of shifts you want to rotate among your employees. You may choose to rotate shifts weekly, bi-weekly, or monthly, depending on your business needs.
2. Develop a rotation schedule: Create a rotation schedule that outlines which staff member will work which shifts on which days. This will help ensure that everyone has an equal chance to work the more desirable shifts.
3. Communicate with staff and notify them of any new shift rotation schedule well in advance so they can plan their personal lives accordingly.
4. Train staff on the new shift rotation schedule and any changes in their work responsibilities.
5. Monitor the shift rotation schedule to ensure that it is working effectively and that all shifts are covered adequately.
6. Ask staff members for feedback on the shift rotation schedule and make adjustments as necessary. This will help ensure that the staff is satisfied with their work schedules.

Offer Incentives

Offering incentives such as overtime pay, and extra time off for working weekends, holidays, or nights can motivate your employees to volunteer for these shifts.

1. Identify the types of incentives to offer: Identify the types of incentives that are appropriate for your business and will motivate staff to work weekend, holiday, and night shifts. This could include overtime pay, extra time off, or other rewards.
2. Communicate the incentives to the staff so that they are aware of what is being offered. This can help motivate them to volunteer for these shifts.
3. Make sure that the incentives you offer are competitive and provide value to staff. This will increase the likelihood that they will volunteer for these shifts.
4. Create a fair and transparent system: Create a fair and transparent system for distributing the incentives. This could include using a lottery system, awarding incentives based on seniority or performance, or other methods.
5. Monitor the effectiveness of the incentives by tracking employee participation in weekend, holiday, and night shifts. This will help you determine whether the incentives are motivating staff to volunteer for these shifts.
6. If the incentives are not effective, adjust them as needed to ensure that they are motivating staff to work these shifts.

Ensure Proper Training

Ensure that all staff members who work during these times are properly trained and understand their responsibilities. This will help prevent any confusion or miscommunication during the shift.

1. Develop a training plan that outlines the skills and knowledge that staff need to work effectively during weekends, holidays, and nights. This could include procedures for handling emergencies, customer service expectations, and safety protocols.
2. Conduct training sessions for staff who will be working during these times. Use a combination of classroom instruction, hands-on training, and shadowing to ensure that staff understands their responsibilities.
3. Provide job aids such as checklists or reference materials to help staff remember important procedures and protocols during their shifts.
4. Provide ongoing training to staff to ensure that they stay up-to-date on new procedures and protocols, as well as any changes to the business operations.
5. Monitor staff performance during weekend, holiday, and night shifts to ensure that they are following procedures correctly and providing excellent customer service.
6. Provide feedback to employees to help them improve their performance and ensure that they are meeting the expectations for the shift.

Provide Adequate Resources

Ensure that staff has the necessary resources to do their job during these times. This includes access to equipment, supplies, and support from management.

1. Assess the resource needs for weekend, holiday, and night shifts, including equipment, supplies, and management support.
2. Procure the necessary resources to ensure that staff has what they need to do their job effectively. This may include additional equipment, supplies, or technology.
3. Communicate the availability of resources to staff, so they know what is available to them during their shift.
4. Train staff members on resource use of any new equipment or technology and provide guidelines on how to use the resources effectively.
5. Monitor how resources are being used during weekend, holiday, and night shifts to ensure that they are being used effectively.
6. Adjust resource allocation as needed to ensure that employees have what they need to do their job effectively.

Communicate Effectively

Effective communication is crucial when managing weekend, holiday, and night cover. Ensure that your staff is informed of any changes to their schedule or any updates related to their shifts.

1. Establish a communication plan that outlines how the information will be shared with staff, including updates to their schedules or changes related to their shifts.
2. Use multiple communication channels to ensure that staff receives information about their schedule or shift changes. This may include email, text messages, or the KlikJobs app.
3. Provide timely updates to employees about any changes to their schedule or shift. This will help ensure that staff are aware of any changes and can plan accordingly.
4. Encourage feedback from staff about their schedules or shift. This will help you identify any issues or concerns that need to be addressed.
5. Address any concerns or issues that are raised by employees promptly. This will help build trust and confidence in your management team.
6. Schedule regular check-ins with staff who work during weekends, holidays, and nights. This will help you stay informed about any issues or concerns and provide an opportunity to address them.