

The Field Operations Playbook



Practical
ways to:



Connect



Coordinate



and
complete
field work

behind the
scenes with
Sonar.



Every day in the field comes with its own challenges — tight schedules, changing priorities, and customers counting on everything to run smoothly. Sonar was built to keep those details connected behind the scenes, so dispatchers, field technicians, and operations teams can focus on getting the job done — not juggling the paperwork that comes with it.

But do you know all the ways it does this?

This field guide shares practical ways to streamline scheduling, improve communication, and give every technician what they need before they arrive on-site. From assigning jobs and tracking progress to using the Field Tech App in real time, you'll see how Sonar keeps your team moving in sync.

And no matter how long you've been with Sonar, we bet you didn't know Sonar could do all this. The craziest part? This guide doesn't even cover everything. If you're looking for more insights, check out our Knowledge Base:

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Scheduling & Dispatch



Did you know you can filter technicians by skills, regions, or availability when scheduling?

In Sonar, you can define Job Types that specify which technicians are qualified to complete certain work and which regions they can operate in.

When it's time to schedule, you can choose to filter by those criteria — showing only technicians who match the job's requirements or are available in that area and timeframe.

It gives dispatchers full control over who's assigned, keeps workloads balanced, and ensures the right technician gets the right job every time.

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Did you know you can manage jobs from three different dispatcher views?



Sonar gives dispatchers flexible ways to manage jobs — from day-to-day scheduling to weekly planning.

The Dispatcher View is your daily workspace. You can schedule and edit jobs, monitor technician activity, and view unscheduled jobs that still need to be assigned.

The Jobs Table lists every job across your system and can be filtered by job type, technician, or status (like scheduled, in progress, or complete). A weekly summary shows totals by type and status, updating automatically as jobs are scheduled or finished.

The Week View gives a clear, high-level look at technician availability — perfect for spotting open time slots or planning future work.

Each view offers a different perspective, helping you balance today's jobs, track progress, and plan for what's next.

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Did you know you can schedule jobs in different time zones?

If your service areas span multiple regions, Dynamic Time Zones in Sonar let you choose which zone to view and schedule in — whether it's your own, the customer's, or the technician's.

This makes it easy to plan jobs accurately without converting times manually or risking missed appointments across zones. It's a simple way to keep dispatching consistent and schedules clear, no matter where your team or customers are located.

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Did you know Sonar can calculate drive times between jobs?

When scheduling, Sonar automatically estimates drive time between a technician's assigned location and each job on their route. It helps dispatchers plan realistic schedules, reduce overlap, and avoid back-to-back appointments that aren't physically possible to complete.

No more guessing how long it takes to get from one site to the next — just clear, data-driven scheduling that keeps your day running on time.

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Did you know Sonar helps you respond fast when plans change?

When an urgent job or outage comes up, Sonar's GPS tracking integrations let dispatchers see where technicians are in real time — so you can quickly find who's closest and best equipped to respond.

And if you need to assign work outside normal scheduling limits, you can override restrictions like overlapping jobs or off-hours assignments to get the right person on-site right away.

It's flexibility when it matters most — helping you stay responsive without losing visibility or control.

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Installations & Service Operations

Did you know Sonar can send text alerts to keep your team in the loop?

Any Sonar user can turn on SMS notifications to get updates about new jobs, schedule changes, or other important activity — right on their phone.

It's especially handy for technicians in the field, who can see when a new job is assigned or a schedule changes without needing to log in.

Each user can choose which alerts they want to get and how they're delivered, so communication stays quick, clear, and convenient for everyone.



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Did you know
Sonar can
automatically
load task
lists for each job?

With Task Templates, you can create step-by-step checklists that automatically populate when a technician checks in to a job — so every install or service call starts with a clear plan.

Tasks can include specific completion requirements, like taking photos, selecting options from a dropdown, or entering notes or readings, ensuring the right information gets captured every time.

It's a simple way to guide new technicians, keep experienced ones consistent, and make sure every job meets the same standard of quality.

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Did you know Sonar can automate what happens after a job is done?

When a job is marked complete — or even if it fails — Sonar can automatically trigger the next steps for you. That might mean activating an account, creating or updating a ticket, or completing another follow-up workflow, all without manual input from the field.

Even better, custom fields filled out during a job — including those completed through a Task Template — can automatically populate fields on other entities like accounts or tickets, keeping your data connected and accurate.

It's one less step for technicians to manage and one more way Sonar keeps your operations flowing smoothly.

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Technician Mobile App

Did you know the Field Tech App keeps fieldwork moving — even offline?



The Sonar Field Tech App gives technicians everything they need to manage jobs on the go — from viewing schedules and account details to updating statuses, logging notes, and capturing photos or signatures right from the job site.

And with the Offline Cache, work doesn't stop when the signal drops. Job details, tasks, and updates are stored locally and sync automatically once the connection returns, so nothing is lost and no extra steps are needed. It's a simple, reliable way to keep field teams connected — no matter where the day takes them.

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