Add a Work Order Appointment

Last Modified on 12/20/2024 2:11 pm EST

Once a work order has been created, appointments may be scheduled with a technician. Create a technician appointment using two methods.

1. From a work order
2. From the calendar

Add an Appointment from a Work Order

A technician appointment may be scheduled from a work order by accessing the work order from a customer record or the Open Work Orders list.

Access the Work Order from the Customer Record

To access a work order from a customer record, from the main menu, navigate to CRM > Customers.

The Customer list opens. Locate the customer in the list, and then click the hyperlink in the Customer # column to open the customer record.

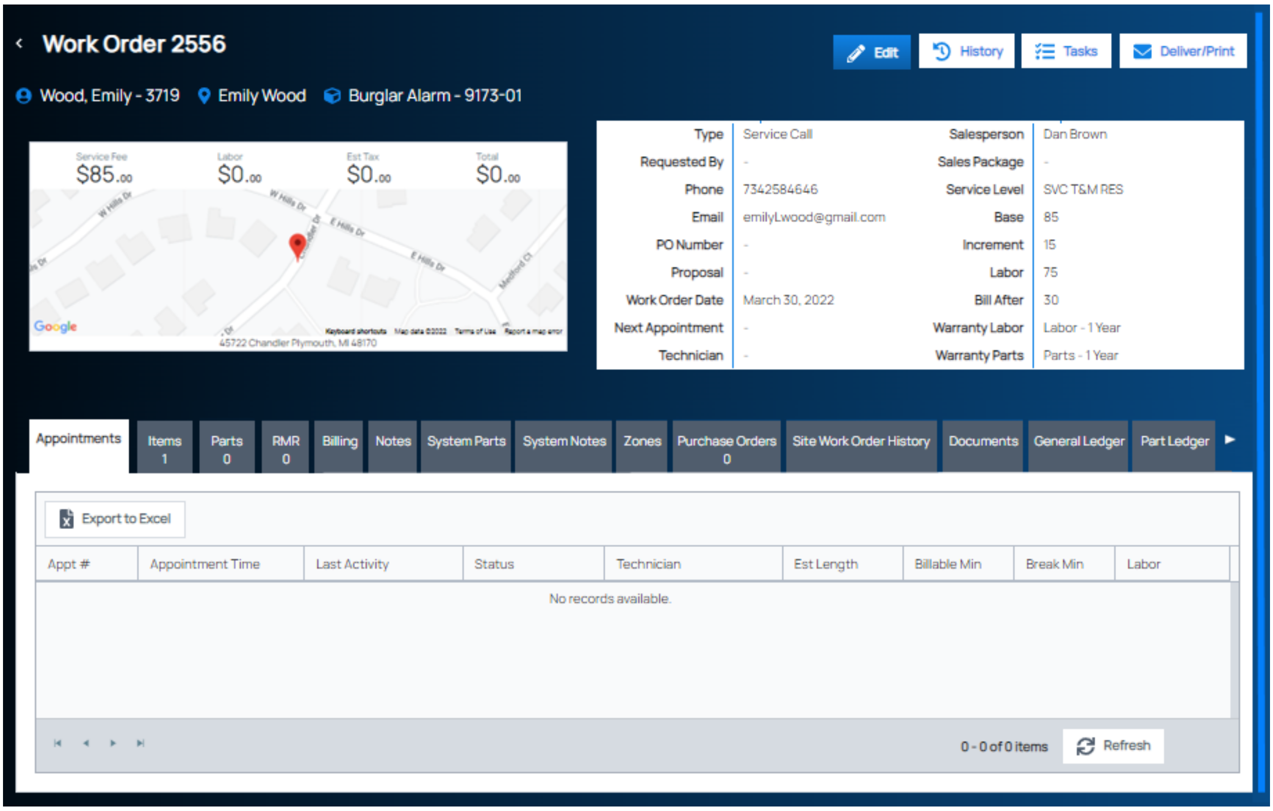
Once the customer record opens, click the Work Orders tab. From the Work Orders tab, locate the desired work order, and then click the hyperlink in the WO # column to open the work order.

Access the Work Order from the Work Orders List

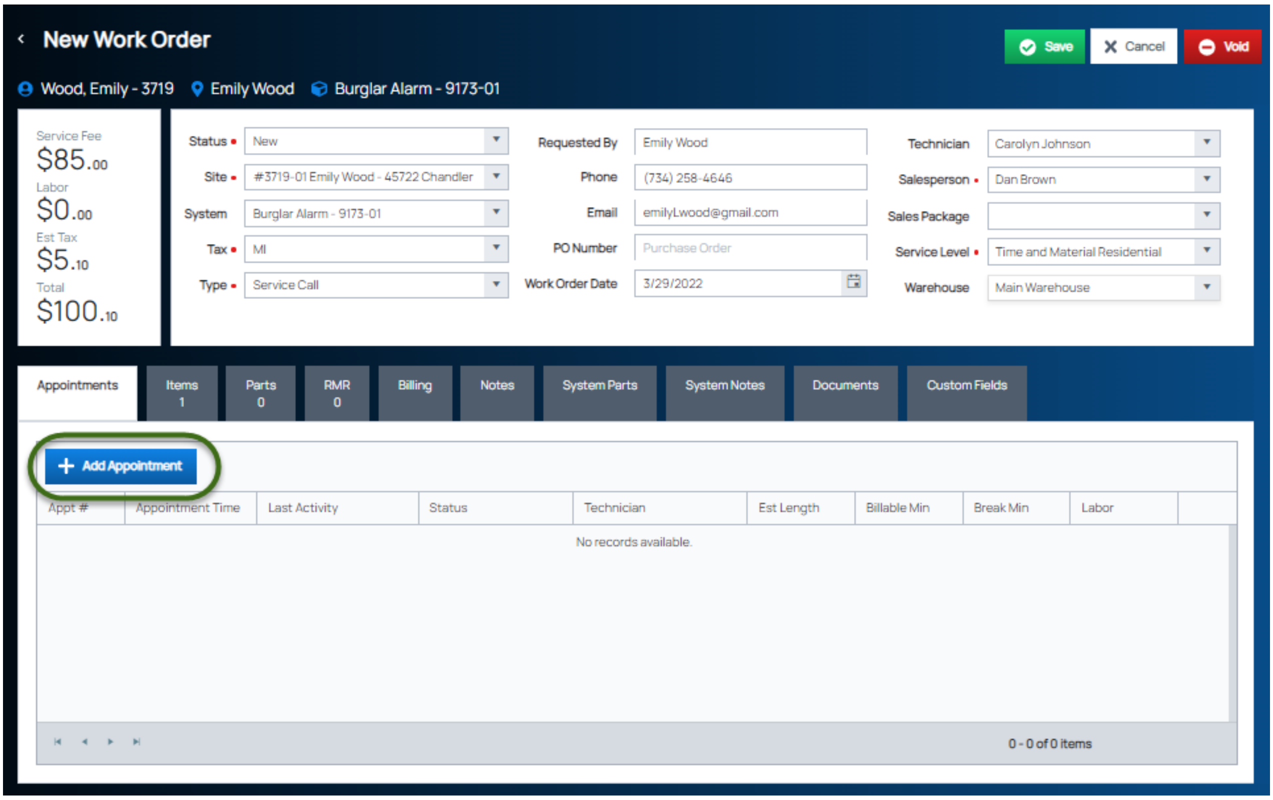
To access a work order from a customer record, from the main menu, navigate to Accounts Receivable > Work Orders.

The Open Work Orders list opens. Locate the desired work order, and then click the hyperlink in the WO # column to open the work order.

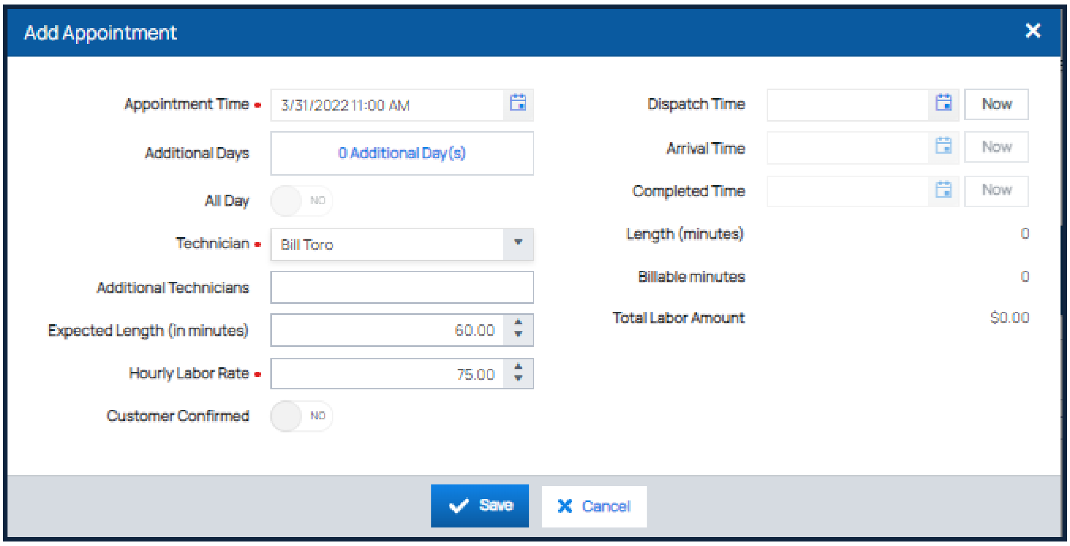
Once the work order opens, click the Appointments tab, and then click the **Edit** button at the upper right of the page.



With the work order in edit mode, click the **Add Appointment** button.



The Add Appointment form opens. Each data entry field is described below.



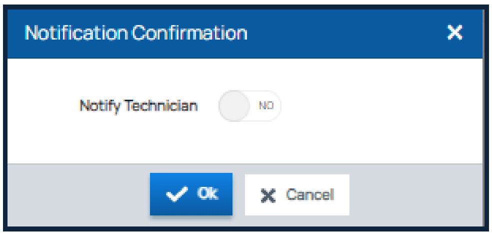
Data Entry Fields

- **Appointment Time**: Select the date and time for the appointment.
- **Additional Days**: If the technician will be on-site for more than one day, click in the white box to open the calendar to select additional days. The appointment time will be the same as what was selected in the first field (appointment time).
- **All Day**: If the appointment will last all day, set the toggle button to Yes. This schedules an appointment from 8:00 AM to 5:00 PM.
- **Technician**: From the drop-down list, select the technician for the appointment.
- **Additional Technicians**: You can select additional technicians. This is for information purposes only and will not create an appointment.
- **Expected Length (in minutes)**: This defaults to the value entered on the Work Order Type setup. This can be changed if necessary.
- **Hourly Labor Rate**: This defaults to the labor rate set up on the Service Level.
- **Customer Confirmed**: If this toggle button is set to Yes, if there is an email address set up on the customer record, an email will be sent an email confirming the work order appointment.

Once all entries have been made, click the **Save** button. A confirmation box opens. If you set the Notify Technician button to Yes, and there is an email address set up on the employee record of the technician, an email will be sent to the technician.

Click the **OK** button at the bottom of the confirmation box.

The saved appointment appears in the grid on the work order appointments tab and will appear on the calendar.



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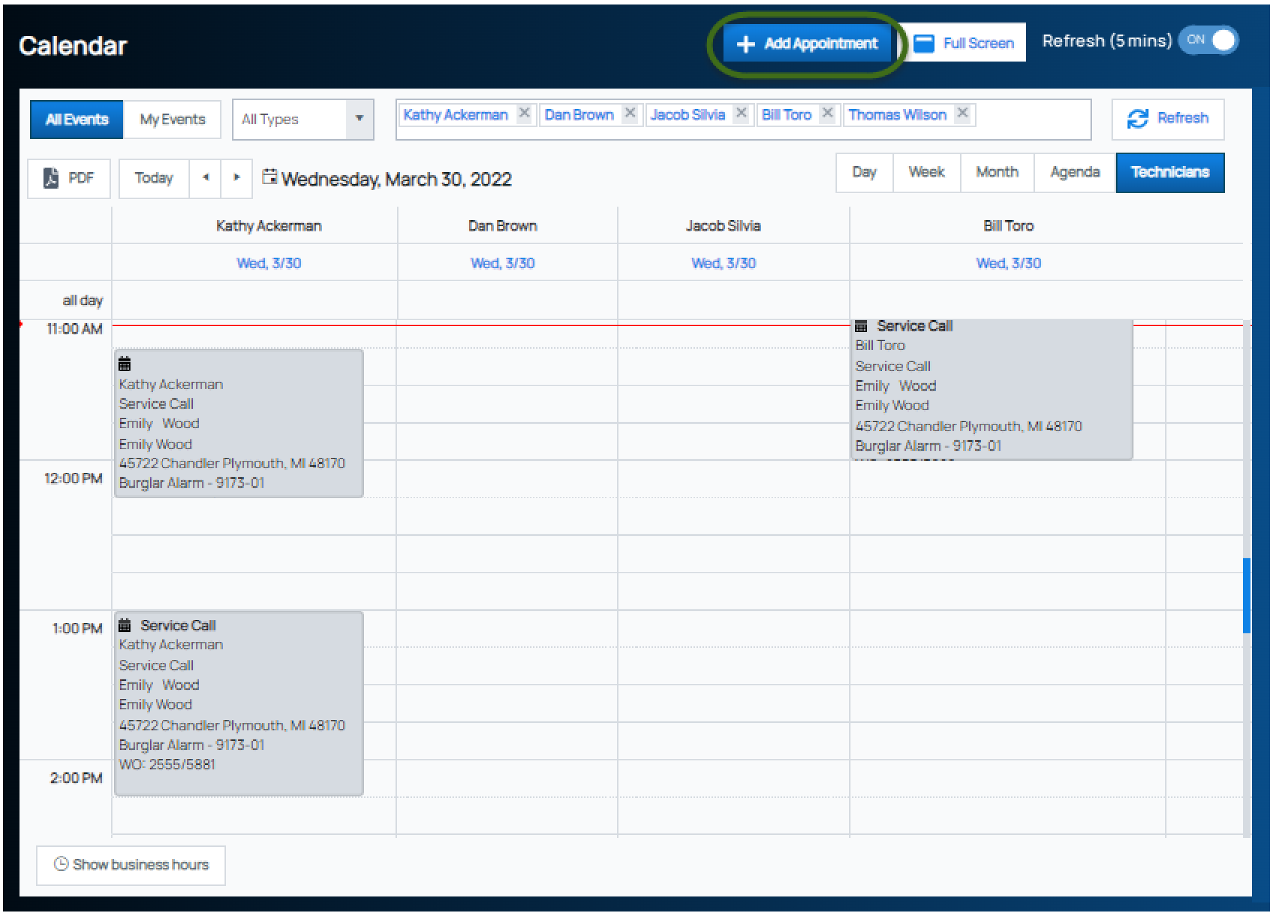
To schedule an appointment from the calendar, from the main menu, navigate to Accounts Receivable > Calendar.

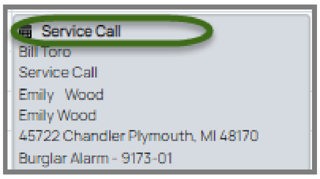
The calendar opens. Click the **Add Appointment** button at the upper right of the page.



The New Event form is displayed. Refer to the data entry field definitions under Data Entry Fields above.

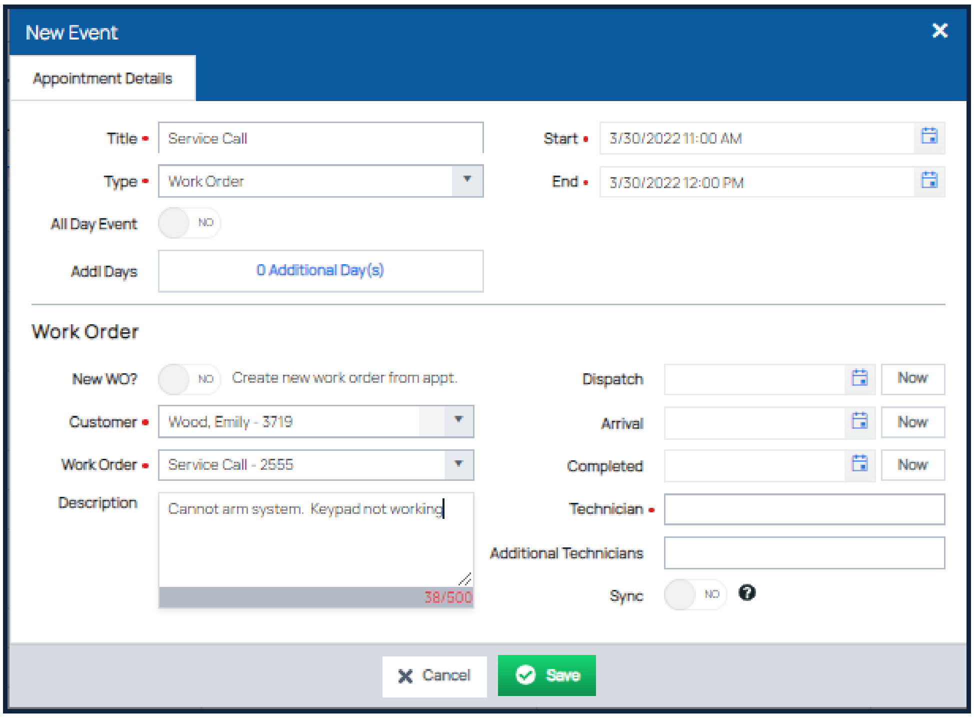
There are two additional fields on this form that are not present when scheduling an appointment from a work order:

- **Title**: This is a description for the appointment. Typically, the word Service or Install is used. When viewing the calendar, the text entered into this field appears on the appointment.



- **Sync**: If this toggle button is set to Yes, and a change is made to the appointment, an email will be sent to the technician.

When finished, click the **Save** button at the bottom of the form.


New Event
Appointment Details
Title
Service Call
Type
Work Order
All Day Event
NO
Addl Days
0 Additional Day(s)
Start
3/30/2022 11:00 AM
End
3/30/2022 12:00 PM
Work Order
New WO?
NO
Create new work order from appt.
Customer
Wood, Emily - 3719
Work Order
Service Call - 2555
Description
Cannot arm system. Keypad not working
38/500
Dispatch
Now
Arrival
Now
Completed
Now
Technician
Additional Technicians
Sync
NO
Cancel
Save