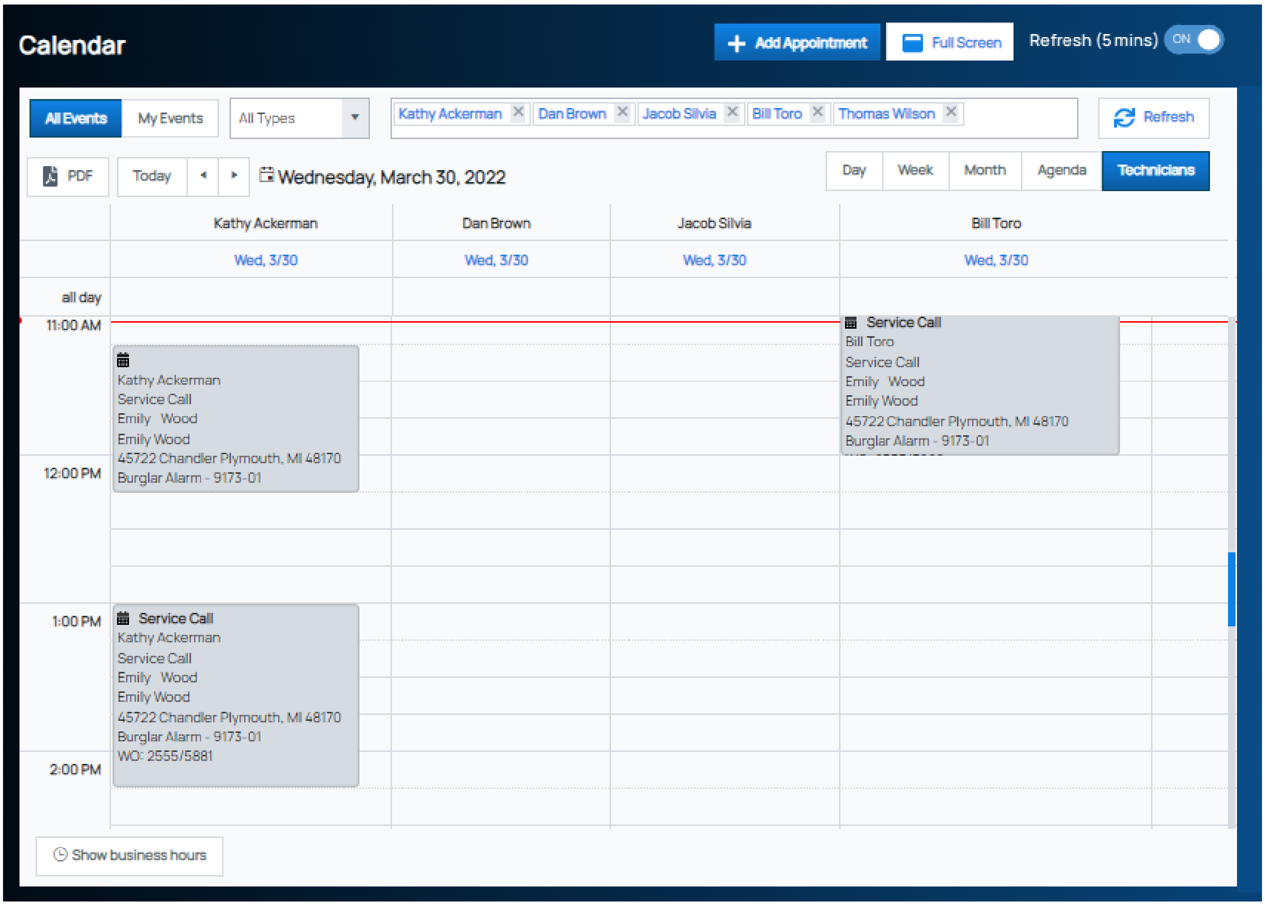
Calendar Definitions and Navigation

Last Modified on 05/05/2022 2:26 pm EDT

The Calendar is designed for scheduling and managing appointments for employees that are flagged as a technician or salesperson.

When first accessing the calendar from Accounts Receivable > Calendar, the default view displays all employees that are flagged as technicians and salespersons in the calendar area for the current date.

There are several options for refining what is currently displayed on the calendar, each of which is described below.



Banner Buttons

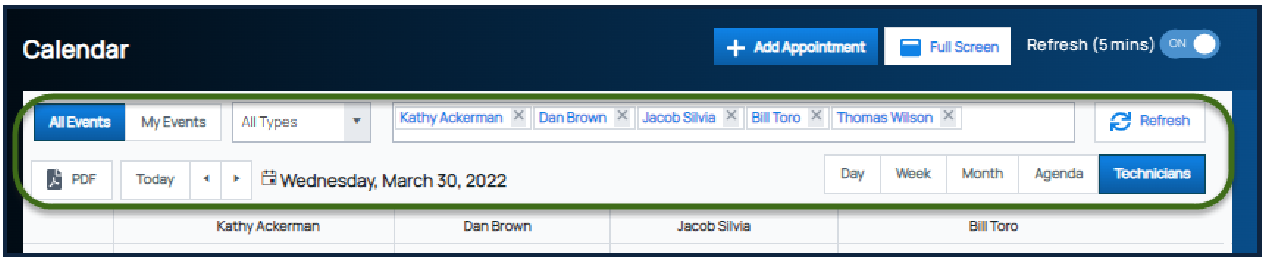
On the right side of the Calendar banner are three buttons: Add Appointment, Full Screen, and the Refresh toggle button.

- **Add Appointment –** Clicking this button allows users to create an appointment for a work order, recurring work order, or a miscellaneous appointment. Instructions are provided later under the topic Add Appointment.

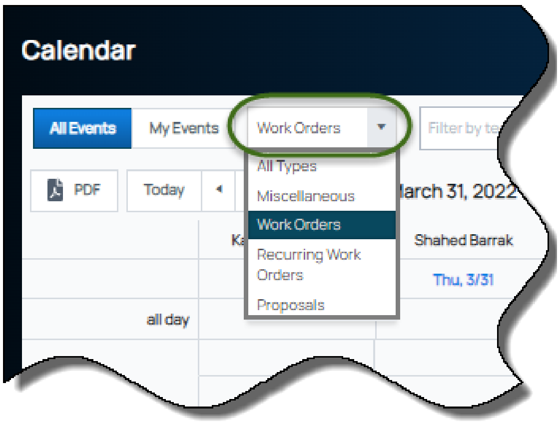
- **Full Screen** – This button will enlarge the Calendar to make viewing easier.
- **Auto Refresh Toggle** – With the toggle set to On, appointments displayed in the calendar will refresh every five minutes. If this button is set to Off, the user would need to manually refresh the page.

Header/Footer Buttons

In the header area of Calendar are several buttons and option fields, which control what is displayed within the calendar.

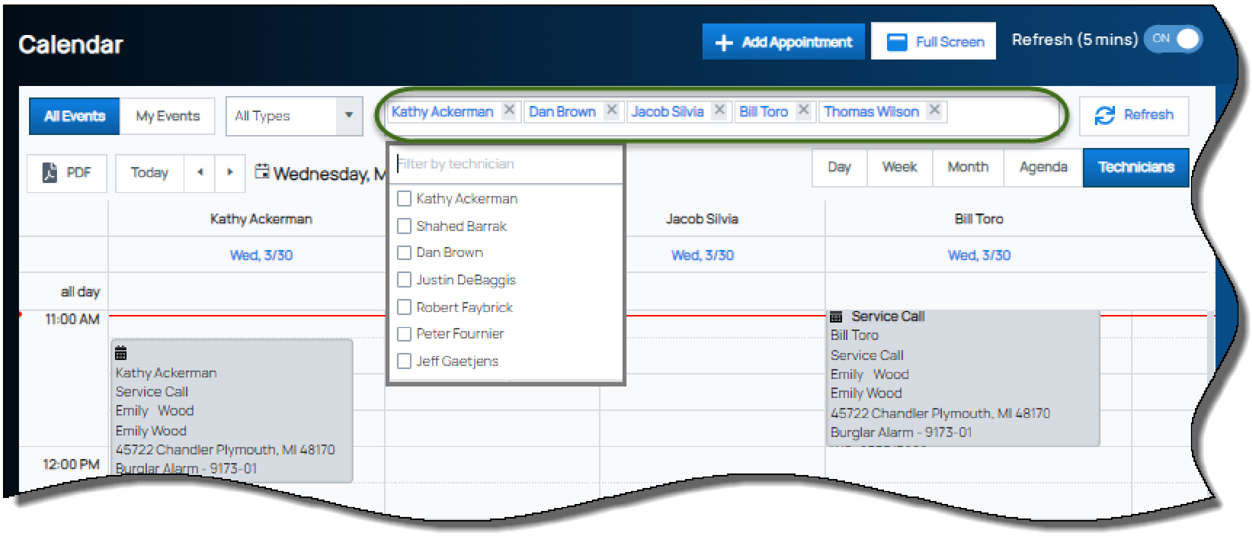


- **All Events** – Appointments are considered to be Events. When selecting this button, all events for all Technicians and Salespersons will be displayed within the calendar.
- **My Events** – If selecting My Events, only the events created by the logged in user will be displayed.
- **Types** – This drop-down list has five choices, All, Miscellaneous, Work Orders, Recurring Work Orders, and Proposals. If the user only wants to see appointments associated with Work Orders, selecting that option will not display any other "event types". Users may select only one option from the drop-down list. The Proposals option is for future development.

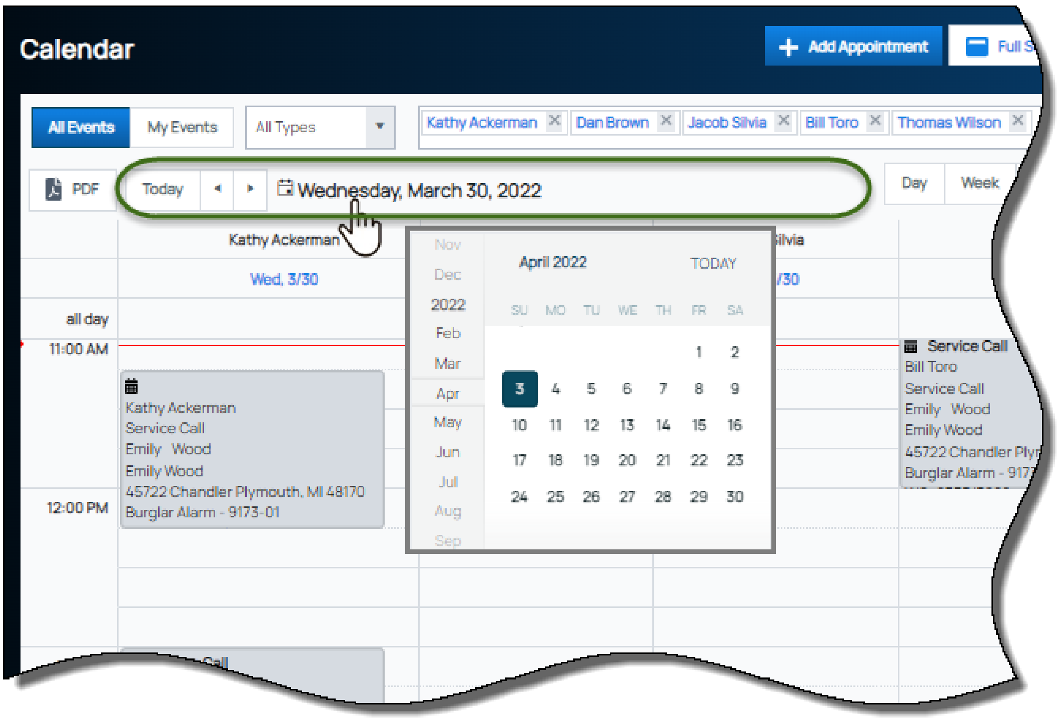


- **Technician/Salesperson Selector** – When the Calendar is first opened, the list of names displayed in the columns is all technicians and salespersons. The employees are displayed alphabetically by last name, and then first name. If you only want to see selected employees, click in the selector box. A list of names will be displayed. Click the box to the left of each employee that you want displayed in the calendar.

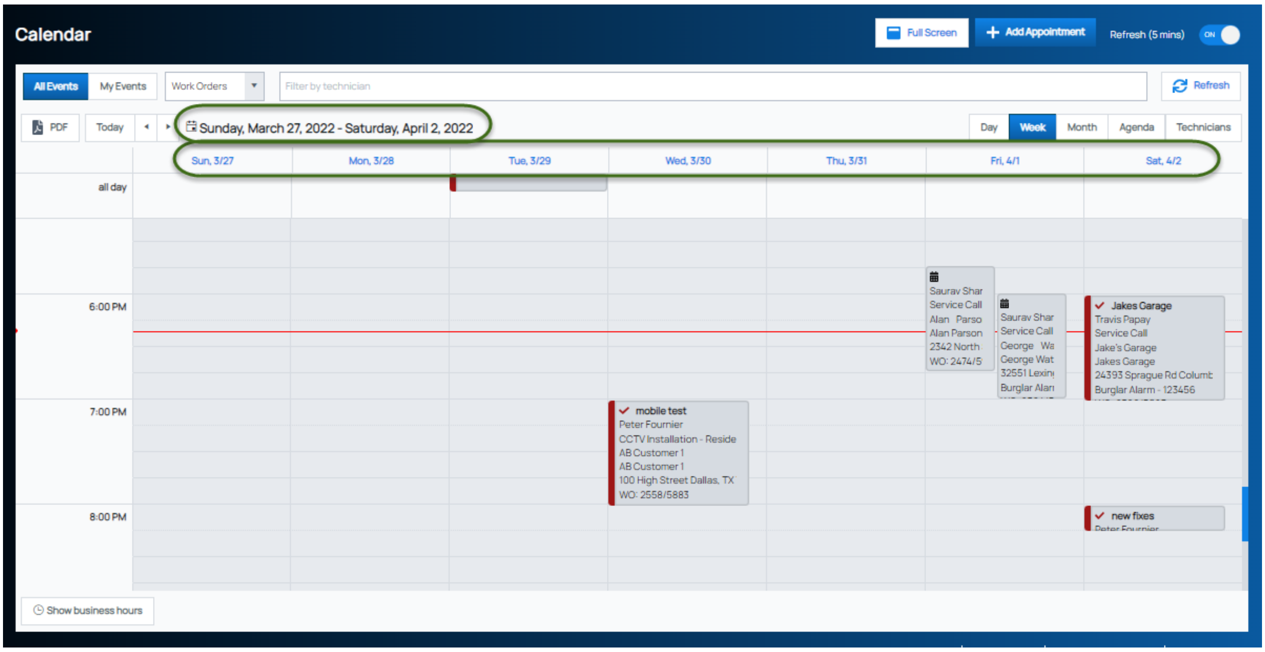
If you want to display the employees in a particular order, click in the selector field and check the box to the left of each employee in the order in which you want them to be displayed from left to right.



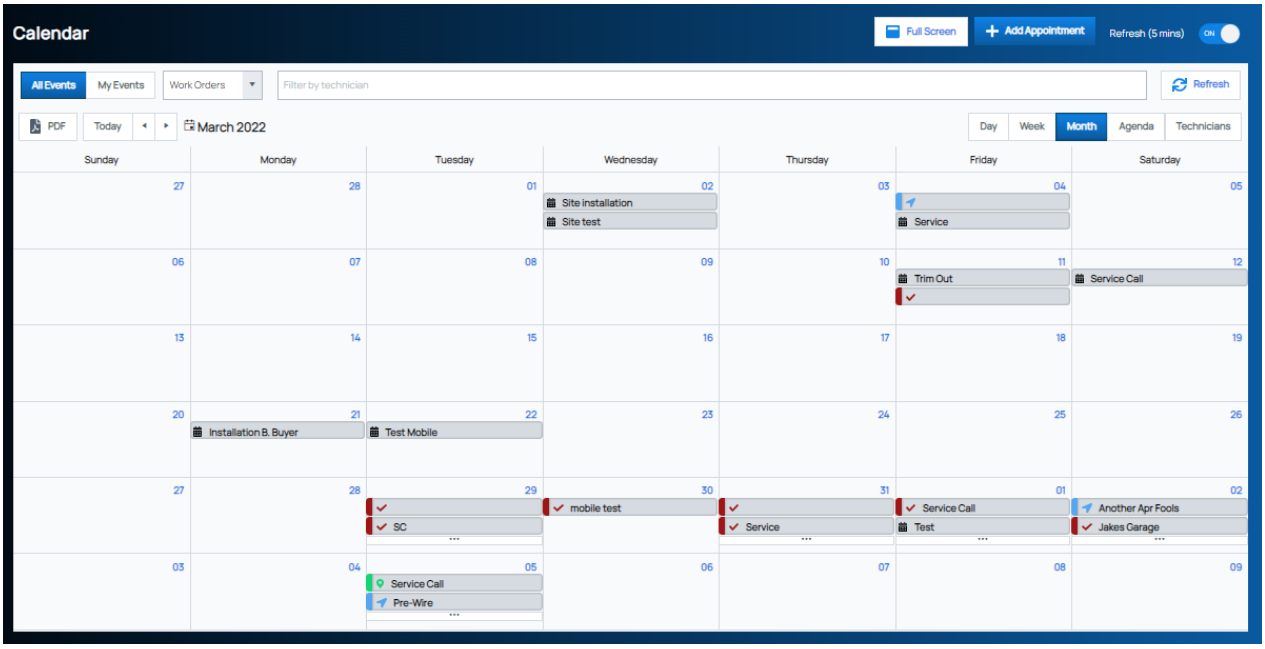
- **Refresh –** Clicking this button will immediately refresh the calendar to display the most current events/appointments.
- **PDF –** Clicking this button will create a .pdf file of the Calendar currently displayed on your desktop.
- **Today –** When opening the Calendar, the default view displays information for the current day. Clicking the left and right arrows allows you to move forward or backward one day at a time. If you are looking for a specific date, click the current date displayed to open a calendar for selecting a specific date.



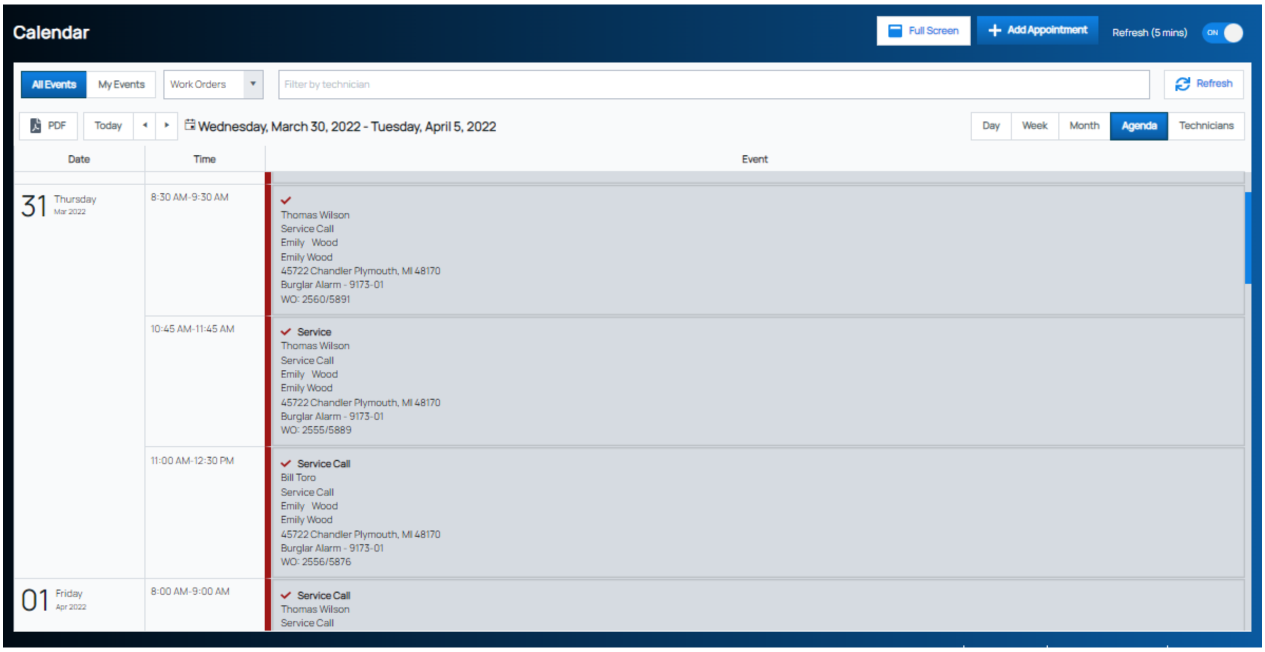
- **Day –** The default view displays one day on the calendar.
- **Week –** Clicking this option will change the view to a week at a time.



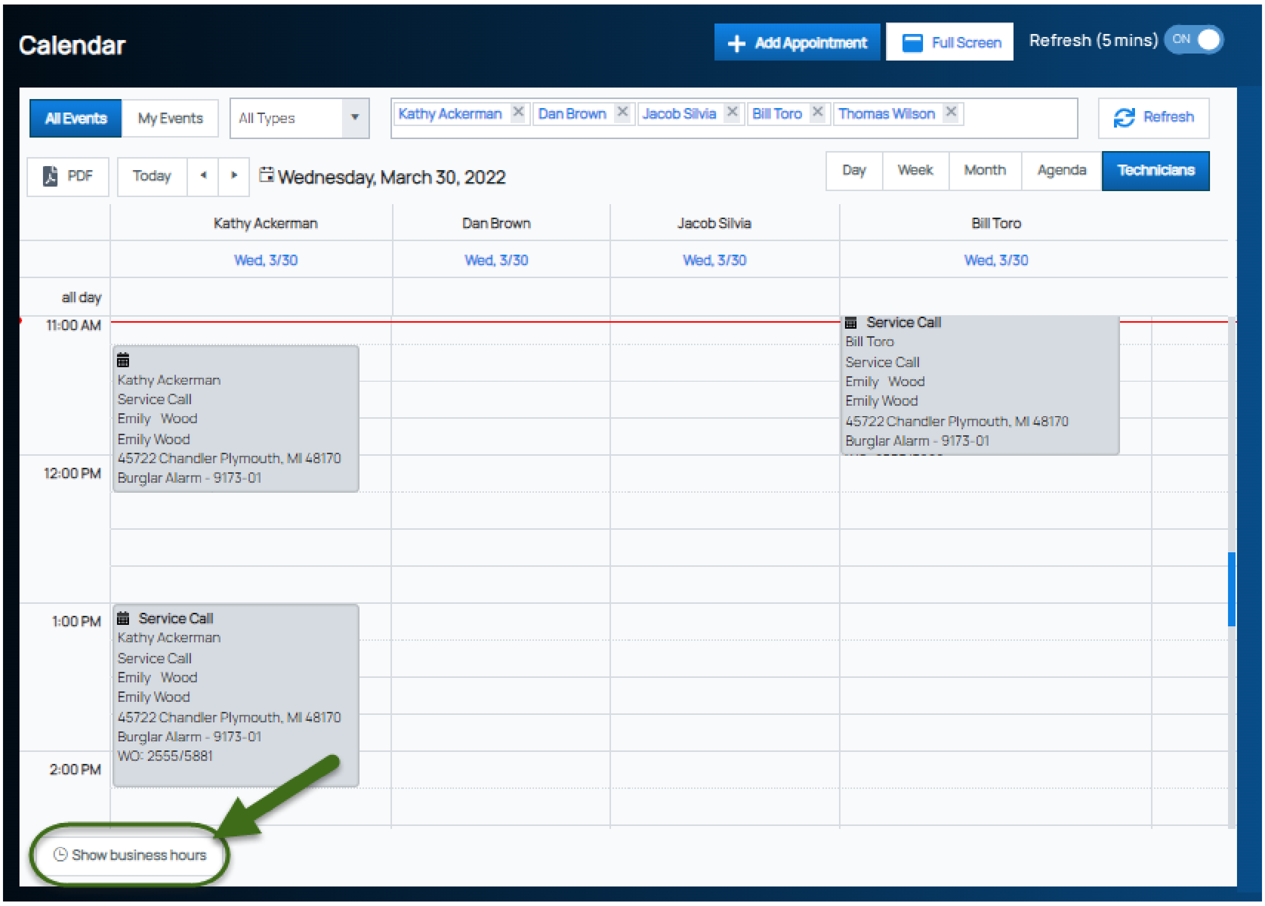
- **Month –** Clicking this option will change the view to a month at a time.



- **Agenda & Technicians –** Switching to Agenda view will display all events/appointments by date in chronological order. To return to the regular calendar view, click on the Technicians button.



- **Show Business Hours –** When selecting this button, the calendar will only display time slots between the hours of 8:00am and 5:00pm.



Event/Appointment Information

To easily identify appointments displayed on the calendar, a color-coding system serves this purpose.

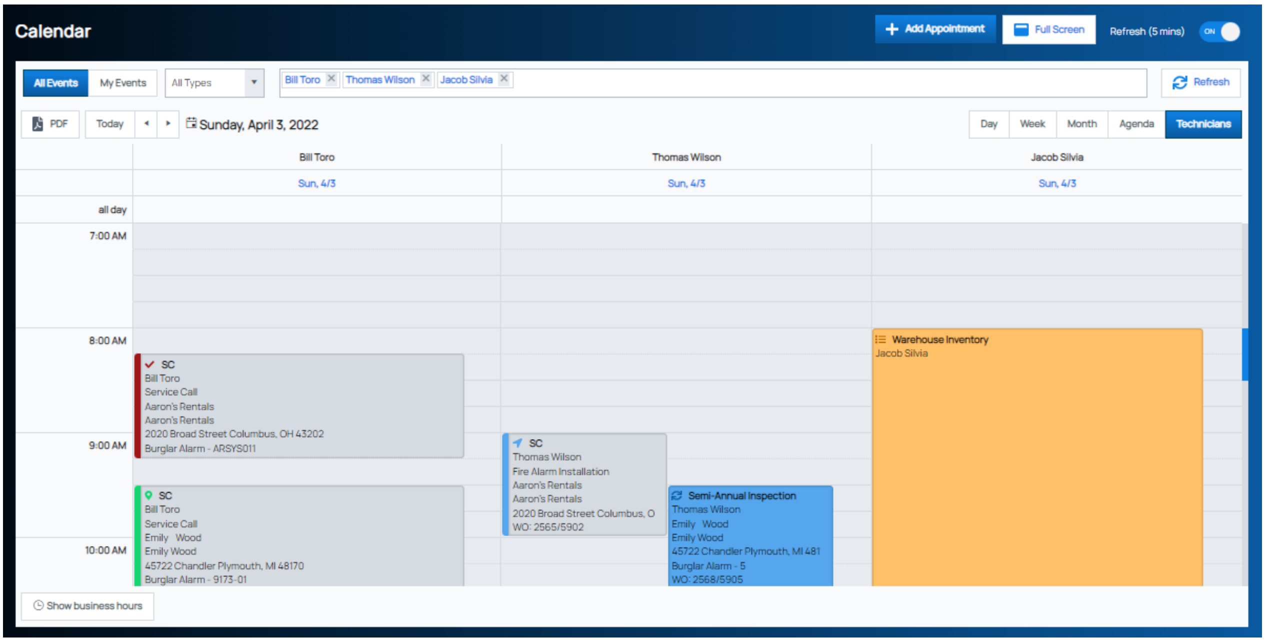
Background Color

- **Gray** – Appointment for a work order
- **Blue** – Appointment for a recurring work order
- **Gold** – Miscellaneous Appointment

Stripe

If there is a colored stripe on the left of the appointment, this indicates the dispatch status.

- **Blue** – Appointment has been dispatched (technician on the way)
- **Green** – Technician has arrived on site
- **Red** – Appointment has been completed



Drag and Drop

Appointments may easily be rescheduled within the same date for the same technician or a different technician.

To reschedule on the same date, with the calendar in Day view, hold down your mouse on the appointment and drag to the desired location on the calendar and then release the mouse.

To reschedule to a different date within the same week, with the calendar in Week view, hold down your mouse on the appointment and drag to the desired location on the calendar and then release the mouse.

To reschedule to a different date within the same month, with the calendar in Month view, hold down your mouse on the appointment and drag to the desired location on the calendar and then release the mouse.