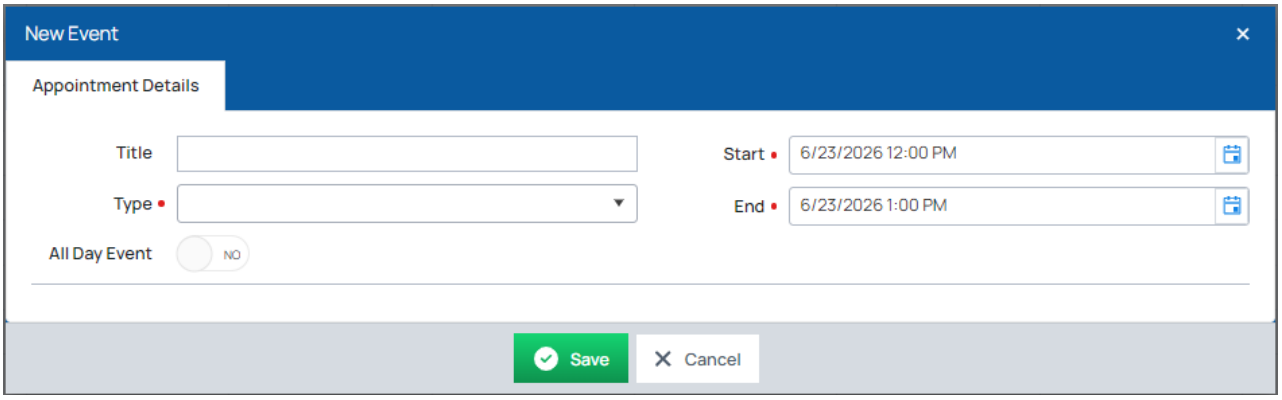
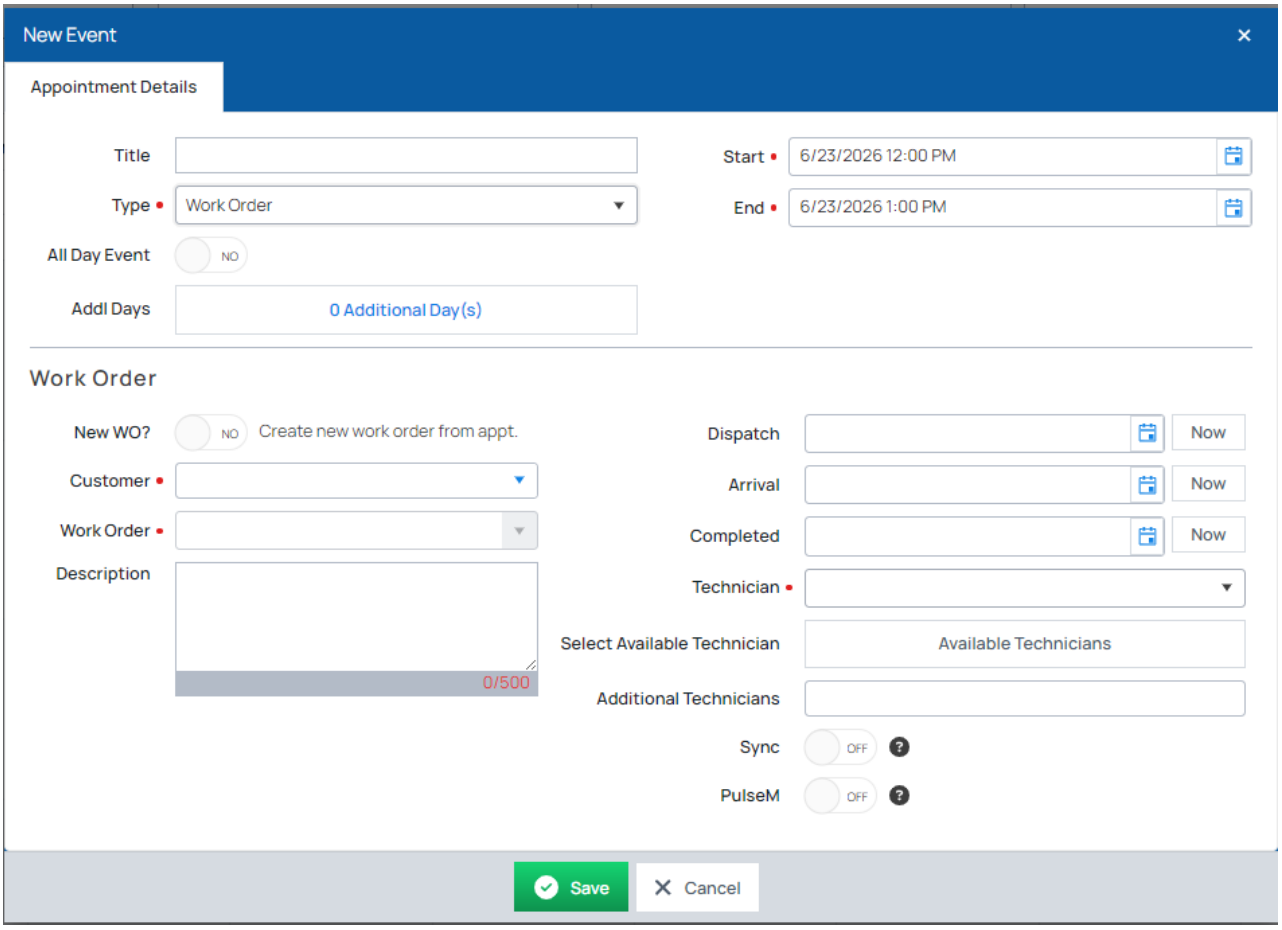
Add an Appointment for a Work Order

Last Modified on 06/24/2026 8:30 pm EDT

On the Calendar page, click the **Add Appointment** appointment button at the top of the page. The New Event form opens.



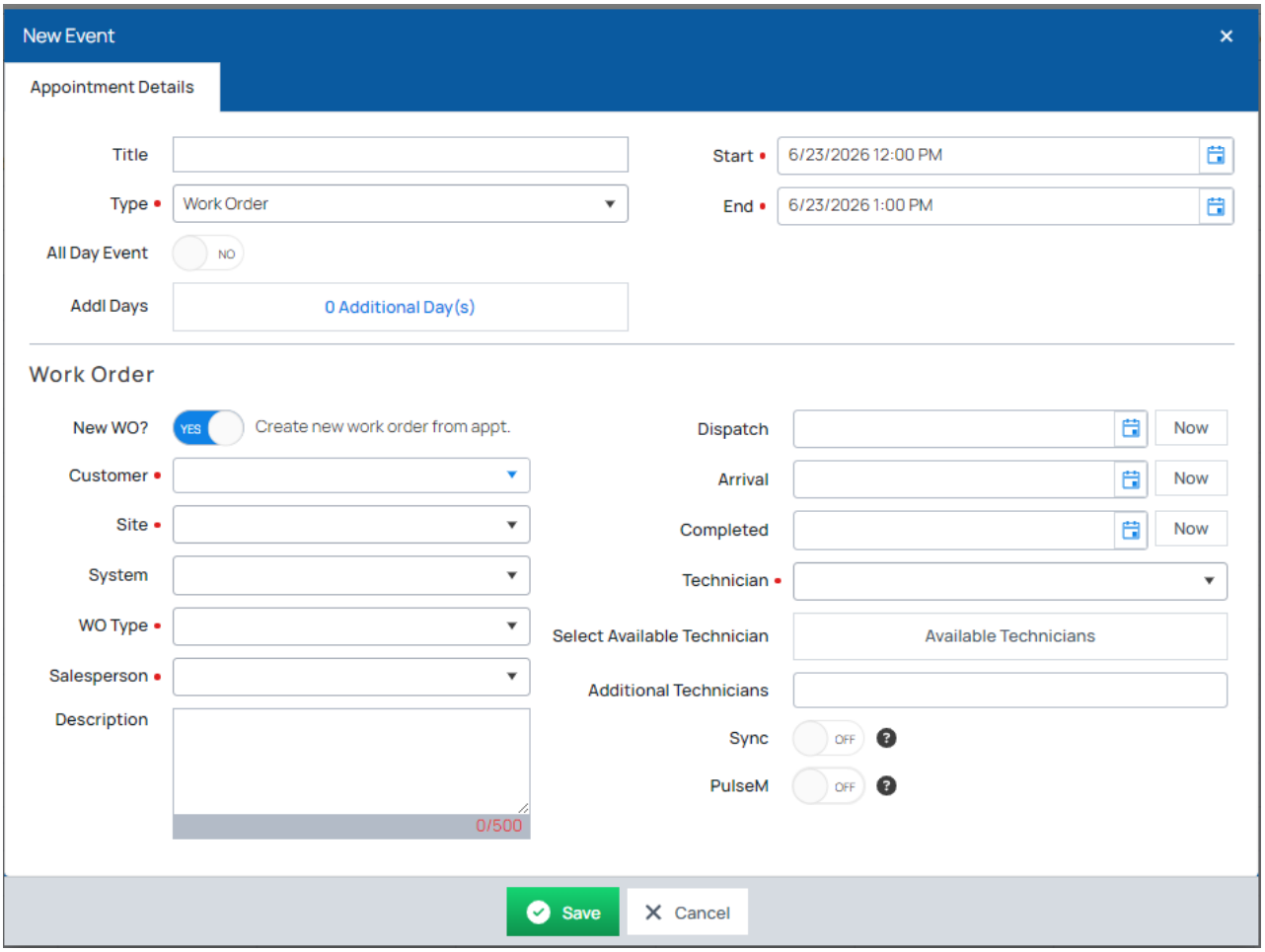
- **Title**: Type a title for the appointment.
- **Type**: From the drop-down list, select Work Order. This expands the form showing additional fields.
- **All Day Event**: If the appointment will last from 8:00 AM to 5:00 PM, set this toggle button to YES.
- **Start**: Enter the start date/time.
- **End**: Enter the end date/time.



- **New WO?**: If you want to create a new work order for this appointment, set this switch to YES.
- **Customer**: Select the customer for the appointment.

- **Work Order**: Select the work order from the drop-down list.
- **Description**: Type a description for the appointment. This information displays on the calendar. Maximum of 500 characters allowed.
- **Dispatch**: Enter a dispatch time.
- **Arrival**: Enter an arrival time.
- **Completed**: Enter a completed time.
- **Technician**: Select a technician for the appointment.
- **Additional Technicians**: If this appointment applies to multiple technicians, click this to select additional technicians.
- **Sync**: If this switch is ON, the system will send an to the technician if someone changes this appointment.
- **PulseM**: If you are using the pulseM integration, notifications will be sent if this is set to ON.

For New WO?, if you selected YES, there are additional fields:



- **Site**: (required) Select a customer site.
- **System**: Select a customer system (if needed).
- **WO Type**: (required) Select the work order type.
- **Salesperson**: (required) Select a salesperson for the work order.

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