

Add an Appointment for a Work Order

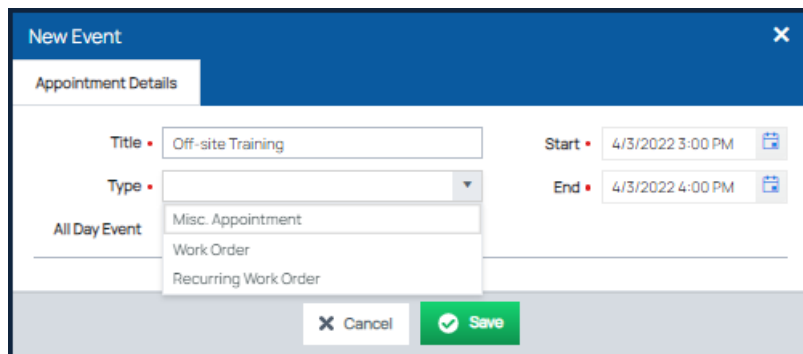
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From the Calendar, click on the Add Appointment at the upper right of the page. The New Event form will be displayed.

- **Title** - Enter a Title for the appointment
- **Type** - From the drop-down list, select Work Order
- **All Day Event** - If the appointment will last from 8:00am to 5:00pm, set this toggle button to Yes.
- **Start** - Enter the start date/time
- **End** - Enter the end date/time

Click the Save button when finished.

The New Event form will expand to enter additional information.

A screenshot of a web application window titled "New Event" with a close button (X) in the top right corner. The window has a blue header bar. Below the header, there is a tab labeled "Appointment Details". The form contains several fields: "Title" with the value "Off-site Training"; "Type" with a dropdown menu showing "Misc. Appointment", "Work Order", and "Recurring Work Order"; "Start" with the value "4/3/2022 3:00 PM" and a calendar icon; "End" with the value "4/3/2022 4:00 PM" and a calendar icon; and an "All Day Event" toggle. At the bottom of the form, there are two buttons: "Cancel" with a close icon and "Save" with a checkmark icon.

- **Customer** - Select the customer for the appointment.
- **Work Order** - Select the work order from the drop-down list.
- **Description** - You may enter a description for the purpose of the appointment. This information will display on the calendar. Maximum of 500 characters allowed.
- **Technician** - Click in the white box to select the technician for the appointment. If this appointment applies to multiple technicians, check the box to the left of each person.
- **Sync** - If this button is set to Yes, if a change is made to the appointment, an email will be sent to the employee(s) selected in the Technician field.

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

New Event



Appointment Details

Title • Service Call

Start • 4/4/2022 4:00 PM

Type • Work Order

End • 4/4/2022 5:00 PM

All Day Event NO

Add Days 0 Additional Day(s)

Work Order

New WO? NO Create new work order from appt.

Dispatch Now

Customer • Wood, Emily - 3719

Arrival Now

Work Order • Service Call - 2569

Completed Now

Description
Keypad broken. Cannot arm system.
33/500

Technician • Thomas Wilson

Additional Technicians

Sync NO ?

Cancel

Save