Create an Installer Appointment from SedonaSchedule Jobs List

Last Modified on 01/11/2023 2:41 pm EST

To create a Job appointment from the SedonaSchedue Open Jobs List, follow the instructions below.

1. If you do not already have SedonaSchedule runnning, navigate to the main application menu and click on the Service menu item. In a few seconds, the SedonaSchedule application will open.

2. Click the Open Jobs button from the Arrangement ribbon group.
The list of Open Jobs will be displayed. In the header area of the list, click on the toggle button so that it displays the words "Double-Click shows Schedule".
Locate the Job Number you wish to schedule within the list of Jobs then double-click on the Job row.

3. The Schedule Job form will be displayed. On the left side of the Scheduling form:
The top area provides static and dynamic information related to the Job.

- Job Task & Labor Task - Make the appropriate selection from the drop-down list. The Job Task is required, but the Labor Task is not. It is highly recommended to select a Labor Task - this indicates what labor function is to be performed during the appointment.
- Start Time & End Time - This is the length of the appointment you are scheduling. Select from the drop-down list for each field. This will determine how much time to block out on the Schedule Board. This information is also used to check the availability of the Technicians on the date and time selected.
- Calendar - On the Calendar, click on the dates for the appointment(s). You may select a single date, multiple consecutive dates, or multiple non-consecutive dates.

The right side of the Scheduling form is where you will select the Technician for the Appointment; more than one person may be scheduled on this form.

This area of the form is divided into two tiers; the Upper Tier lists all Technicians in the Display Group that is shown at the top of this form - you may change the Display Group to another if needed. Double-clicking on a Technician's name in the Upper Tier will move the name down to the Lower Tier.

The software checks the Schedule Board to see if the selected Technician is available for the date/time selected on the left side of the scheduling form. If the Technician is available, a green checkmark will appear to the left of the proposed appointment. If the Technician is already scheduled for another appointment for requested date/time, the proposed appointment will be displayed with a red font and a red warning icon to the left of the Technician's name.

If there is a scheduling conflict with any of the Technicians selected, click once on the Technician name in the upper tier then click on the Remove button.

Once satisfied with the selected Technicians, click on the Schedule button at the lower right of the form.

4. The Create Appointments form will be displayed; this will list the appointment dates/times selected on the previous Job Scheduling form. If you decide not to create appointments for any item in the list, un-check the checkbox to the left on that line. When finished, click on the Save button at the lower right. The Job Appointments will now be displayed on the Schedule Board.