

Display Groups

Last Modified on 01/10/2023 10:42 am EST

To be able to best manage the Schedule Board, you must first set up Display Groups.

A Display Group consists of a list of selected Technicians which you want to display in the Schedule Board as a group. When viewing the Schedule Board, you may change the current Display Group at any time to make scheduling simpler. A Technician may belong to one or multiple Display Groups.

Your Display Groups may be designed in any logical fashion to make viewing, scheduling and dispatching as easy as possible.

If you do not setup Display Groups, the default display group ALL will be the only choice available; this default group contains all Technicians for the company. If your company does not need to create additional Display Groups, you may edit the default ALL display group to sequence your Technicians in the order you want the names to be displayed in the Schedule Board.

If your company operates under multiple Branch locations, each Branch may have their own Display Groups. Some examples are:

MI Technicians, MI Inspectors, OH Technicians, OH Inspectors, MI In-house Programming, MI Customer Service, etc.

To setup a new display group, you must first launch the SedonaSchedule module from the main Sedona Office application. On the main menu, click on the Service menu option. In a few seconds the SedonaSchedule application will be displayed.

□

Once the SedonaSchedule application is open, in the display area, the Schedule Board will list the Unassigned Technician.

To create new Display Groups, click on the Display Group Edit button on the Ribbon.

□

The Display Group form will be displayed. Click on the New button located at the lower right of the form.

□

Enter a Code and Description for the Display Group. In the list of Technicians, check the box to the left of each Technician that will be included in the group.

In the Sequence column you may entered the numbered order in which the Technicians will display in the Schedule Board. If Sequence numbers are not entered, Technicians will be displayed alphabetically by last name then first name. When finished selecting Technicians and entering sequence numbers, click the Save button located at the lower right of the form.

Continue setting up additional Display Groups by pressing the New button and repeating the process.

When finished creating your Display Groups, click on the "X" in the upper right corner of the Display Group form to exit Display Group setup.

□

Click on the Display Group drop-down arrow to view the list of all your Display Groups. Select the Display Group you wish to view in the Schedule Board.

