

SedonaSchedule - Schedule Board

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The Schedule Board is used to create and manage Technician Appointments. Ticket, Job and Miscellaneous appointments that have been created appear on the Schedule Board.

New Ticket

A new ticket may be created and scheduled from the Schedule Board. Clicking on the Service Ticket radio button (Calendar Options Ribbon Group) then double-clicking on a time slot within the Schedule Board will open the Customer Search form to locate the customer for the Ticket. Once the Customer has been selected, the New Service Ticket form will be displayed for data entry. Once the Ticket has been saved, the Appointment will appear on the Schedule Board.

Rescheduling

Appointments may be rescheduled within the same day by dragging the appointment within the same Technician or to another Technician. This drag and drop method of rescheduling may be done while using any of the three pre-defined views; Day, Week or Month.

Dispatching

The term Dispatching refers to entering the times for a Technician Appointment:

- Dispatched Time - The time (in hours and minutes) the Technician is on the way to the appointment
- Arrived Time - The time (in hours and minutes) the Technician arrives on site
- Departed Time - The time (in hours and minutes) the Technician leaves the site

Dispatching is typically performed from the Schedule Board. Dispatch times may be done in a Live Dispatch mode or times may be entered at a later time.

Deleting Appointments

Appointments may be deleted from the Schedule Board. Clicking on an Appointment within the Schedule Board then pressing the delete key on your keyboard will display a confirmation message that you want to delete the appointment. Deleted appointments are logged to the Ticket History.

Viewing Multiple Days

Using the Calendar Bar, you are able to view multiple days within the Schedule Board. You may select consecutive or non-consecutive days to be displayed. The image below demonstrates multiple non-consecutive days.

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