

Calendar Options Ribbon Group

Last Modified on 01/11/2023 3:21 pm EST

The **Calendar Options Ribbon Group** contains options for viewing the Schedule Board, as well as shortcut methods for creating new appointments. Several options are contained within this Ribbon Group which are listed below with brief descriptions. Each of these options will be detailed below.

- Display Group Selector – Selects which group of Technicians will be displayed in the Schedule Board.
- Display Group Setup - Clicking on the icon to the right of the Display Group will open the Display Group setup form; Display Groups are added and maintained from this form.
- Display Group Technicians – Displays in a drop-down list, the Technicians that are members of the currently viewed Display Group.
- Show Unassigned - Displays the Unassigned Technician as the first column within the Schedule Board.
- Group Day Within Owner - Allows you to see multiple dates for Technicians grouped together.
- Zoom Buttons - Controls the time slot view within the Schedule Board.
- New Appointment Radio Buttons
- Wrench - When selected, double-clicking on a time slot within the Schedule Board will create a new ticket and schedule a Technician Appointment in one step.
- Hammer - When selected, double-clicking on a time slot within the Schedule Board will open the list of open Jobs from which to select for scheduling an Appointment.
- Clock - When selected, double-clicking on a time slot within the Schedule Board will open the Miscellaneous Appointment scheduling form.

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Display Group Selector

Clicking on the drop-down arrow will display a list of all available Display Groups from which the User may select. Selecting a Display Group will display all the Technicians linked to that Display Group within the Schedule Board.

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Display Group Technicians

Clicking on this option displays a list of all Technicians currently displayed in the Schedule Board. The User may uncheck one or more Technician names if they do not want to include them in Schedule Board currently being viewed.

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Show Unassigned

If this option is selected, the "Unassigned Technician" will be displayed as the first column in the Schedule Board. Appointments may be scheduled with the Unassigned Technician, and then dragged to a company Technician at a later time. This option may be toggled on or off at any time. Multiple appointments within the same time slot may be created

for the Unassigned Technician.

Note: If an appointment is created for Unassigned Technician and is not moved to a company Technician, the User will not be allowed to un-check the Show Unassigned checkbox.

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Group Day Within Owner

This option allows you to view multiple dates for Technicians grouped together. The dates displayed within each Technician are determined by the dates highlighted on the Calendar. Dates selected for display in the Schedule Board may be consecutive or non-consecutive. This option is available when viewing the Schedule Board in Day view only.

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Zoom Buttons

Clicking on the + or - button will increase or decrease the time slots viewed within the Schedule Board. The Schedule Board may be viewed in one-hour, half-hour and quarter-hour time slots. The image below displays the one-hour time slot view.

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Clicking on the + or - button will increase or decrease the time slots viewed within the Schedule Board. The Schedule Board may be viewed in one-hour, half-hour and quarter-hour time slots. The image below displays the half-hour time slot view.

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New Appointment Radio Buttons- Service Ticket, Job, Miscellaneous Appointment

These radio buttons are used to quickly schedule an appointment on the Schedule Board. Depending on which radio button is selected, when double-clicking on a Time Slot within the Schedule Board, a different path is taken to create the appointment.

□ This option is used to create a new service ticket and schedule a technician appointment at the same time. When double-clicking on a timeslot on the schedule board, the customer search form will open to select the customer for the new ticket. After saving the ticket, the appointment will appear on the schedule board.

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□ This option is used to create a new Job appointment. When double-clicking on a timeslot on the schedule board, the list of open jobs will be displayed. Once a Job number is selected, the Job Scheduling form will be displayed to select other options. Once saved, the appointment will appear on the schedule board.

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□ This option is used to schedule a Miscellaneous appointment. When double-clicking on a timeslot on the schedule board, the Miscellaneous Appointment form will be displayed. Once saved, the appointment will appear on the schedule board.

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