

Firm Appointments

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A “Firm Appointment” is one that must be completed on the scheduled date and time and should not be changed. Once an appointment has been marked as “Firm”, it may not be moved or modified within the Schedule Board unless the User removes the “Firm” flag. The Firm Appointment option may be used for Ticket or Job Appointments.

Marking an appointment as Firm, locks down the date/time and Technician for the appointment. While that appointment is locked, several restrictions are put into place by the software:

- Users cannot drag-and-drop a firm appointment to a different time-slot or to another Technician on the Schedule Board.
- You cannot “drag-adjust” the length of an appointment on the Schedule Board (i.e. grabbing the top or bottom of an appointment and increasing or decreasing its length).

An Appointment may be marked as Firm using one of two methods which are both shown below.

Once an appointment has been marked as Firm, the background color of the Ticket will be displayed with a bright pink color.

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Mark Firm from the Schedule Board

The easiest way to mark an appointment as Firm, is by right-clicking on the appointment from the Schedule Board, then selecting the Firm Appointment option.

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Mark Firm from the Ticket or Job Dispatch Form

To mark an appointment as Firm from the Ticket or Job Dispatch form, click once on the Appointment within the Schedule Board. Next click on the Edit button within the Ticket Detail Viewer.

The Ticket/Job Dispatch form will be displayed. Below the Estimated Length field, check the box to the right of the Firm Appointment field. Click the Save button when finished.

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Remove the Firm Flag

To remove the Firm Flag from an Appointment, from the Schedule Board, click once on the Appointment, right-click and select the Firm Appointment option. This will remove the flag and the bright pink background color will clear.

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