

Reschedule a Technician Appointment

Last Modified on 01/11/2023 3:34 pm EST

If an appointment needs to be re-scheduled, there are a few methods available to accomplish this. Depending if you are currently working within the Schedule Board or within a Ticket, the process is different and may have fewer or more steps involved. Basically it is the preference of the User to choose the easiest method at the time.

Continue on to the following pages for instructions on the various Appointment Re-scheduling methods.

Reschedule from the Schedule Board

If a Technician Appointment is being re-scheduled for the same day; either with the same Technician or a different Technician, the easiest method is using the drag and drop method on the Schedule Board.

From the Schedule Board, click on the Appointment to be re-scheduled, hold the left mouse button down then drag the Appointment to the desired Technician column and time slot, then release the mouse. The Appointment is now moved to the new Technician/time-slot.

□

This re-scheduling method is performed from the Schedule Board, and would be used if you are re-scheduling for a different date and/or a different Technician.

From the Schedule Board, click once on the Appointment to be re-scheduled. Next click on the Edit button within the Ticket Detail Viewer.

The Ticket/Job Dispatch form will be displayed. You may change the Technician by clicking on the drop-down arrow [in the Technician field] and selecting another name from the list.

You may change the Appointment Date, by clicking the drop-down arrow in the Scheduled field and select a new date on the Calendar. You may also change the appointment time by clicking the drop-down arrow in the Time field and selecting a choice from the list.

Click the Save button when finished. The Appointment will now be moved to the Technician/Date/Time selected.

□ □

Reschedule from a Ticket

This re-scheduling method is easy to use if you are already working in the Ticket.

With the Ticket open, click on the Appointments and Labor button from the ribbon. In the lower tier, double-click on the appointment to be re-scheduled.

The Ticket Dispatch form will be displayed. You may change the Technician by clicking on the drop-down arrow [in the Technician field] and selecting another name from the list.

You may change the Appointment Date, by clicking the drop-down arrow in the Scheduled field and select a new date

on the Calendar. You may also change the appointment time by clicking the drop-down arrow in the Time field and selecting a choice from the list.

Click the Save button when finished. The Appointment will now be moved to the Technician/Date/Time selected.

□