

Delete a Technician Appointment

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If an appointment needs to be deleted, there are two 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. Both methods are described below.

Note: If you are deleting an appointment because the customer has cancelled, and the technician is already on the way to the appointment, you may want to complete the dispatching to record the amount of drive time. Later you may decide whether to bill the customer for the drive time.

Delete a Technician Appointment from the Schedule Board

To delete an Appointment from the Schedule Board, click once on the appointment to be deleted, then press the Delete key on your keyboard. You will receive a confirmation message asking if you want to delete the appointment, click Yes button to confirm.

If there are no other scheduled appointments for the Ticket, the Ticket will appear in the Unscheduled list.

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Delete a Technician Appointment from a Ticket

To delete an Appointment while working in the Ticket, click on the Appointments and Labor button from the ribbon. In the lower tier of the form, click once on the Appointment to be deleted, press the delete key on your keyboard. You will receive a confirmation message asking if you want to delete the appointment, click Yes button to confirm.

If there are no other scheduled appointments for the Ticket, the Ticket will appear in the Unscheduled list.

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