

# Technician Schedule

Last Modified on 01/18/2023 5:24 pm EST

The Technician Schedule Report is designed to print a listing of Ticket (Service or Inspection) and/or Job scheduled appointments for Technicians and/or Installers. This report may be generated for a single date or a date range.

Once the desired options have been selected on the report options form, click the OK button to display the report in Print Preview mode.

## Report Selections

**Dates (Appointment Date)** - This option will default to the Current date. If a different Date Range is desired, you may enter the From and To dates.

**Options** - You may select one, multiple or all of the options.

- *Print Each Tech on a separate page* - Selecting this option will begin a new page for each Technician's Appointments.
- *Include Resolved Service Tickets and Installed Jobs* - Selecting this option will include Tickets where a resolution code has been selected and saved to the ticket and completed Jobs. Completed Jobs are those where all tasks on the Job Task List have been approved.
- *Print Service and Install Lists separately* - Selecting this option will print a new page for Ticket and Job appointments for each Technician.
- *Include Closed Service Tickets and Installed Jobs* - Selecting this option will include Tickets and Jobs that have been closed.

**Include Service Appointments** - If appointments are to be printed for Service and Inspection Tickets, select this option.

**Include Job Appointments** - If appointments are to be printed for Jobs, select this option.

**Service Companies** - The report default is to print data for all active Service Companies. If it is desired to print the data associated with one or multiple Service Companies, you may select the checkbox to the left of each Service Company desired.

**Routes** - The report default is to print data for all active Route Codes. If it is desired to print the data associated with one or multiple Routes, you may select the checkbox to the left of each Route desired.

**Branch** - The report default is to print data for all active Branches. If it is desired to print the data associated with one or multiple Branches, you may select the checkbox to the left of each Branch desired.

**Technicians** - The report default is to print data for all active Technicians and Installers. If it is desired to print the data associated with one or multiple Technicians, you may select the checkbox to the left of each Technician desired.

**Display** - Employee Code is selected by default; you may select Employee Code or Employee Name to print on the report.

- *Employee Code* - If this option is selected, the Employee Code field from the Employee Setup will be printed on the report.
- *Employee Name* - If this option is selected, the Technician name printed will be formatted as: "Last Name, First Name" fields of the Employee Setup.

**Technician Schedule** [X]

Dates  
 From: 5/1/2018 To: 5/1/2018

Options  
 Print each Tech on a separate Page.  Print Service and Install Lists separately.  
 Include "Resolved" service tickets and "Installed" jobs  Include "Closed" service tickets and "Installed" jobs

Include Service Appointments

Routes

Include Job Appointments

MI  
 MI-Group Tkts  
 MH-INSP Cont  
 Newington Electric Co.  
 OH  
 OH-INSP Cont  
 Hide Inactive Companies  
 Select All Invert Selection

001  
 002  
 Doors  
 MI  
 MI INSP  
 OH  
 Hide Inactive Routes  
 Select All Invert Selection

A1  
 MI  
 OH  
 Prior Jobs  
 Hide Inactive Companies  
 Select All Invert Selection

Tech	Department	Service Company	Install Company	Expertise Level	Service Tech	Installer
<input checked="" type="checkbox"/> Bob.Oliver	Salesx	MI	MI	3	Y	Y
<input checked="" type="checkbox"/> David.Jones	Service	MI	MI	3	Y	Y
<input checked="" type="checkbox"/> Gloria.Krane	Installation	OH-SVC Cont	OH	2	Y	Y
<input checked="" type="checkbox"/> Madison.Morrison	Installation	MI	MI	5	Y	Y
<input checked="" type="checkbox"/> Mark.Taylor	Service	Borque	MI	5	Y	Y
<input checked="" type="checkbox"/> Maxwell.Krife	Administration	MI	MI	3	Y	Y
<input checked="" type="checkbox"/> Michael.Johnson	Administration	MI	MI	0	N	Y

Employee Code  Employee Name