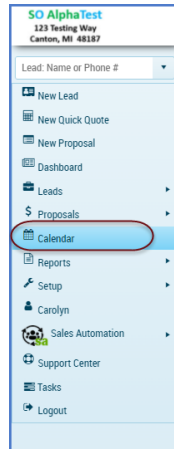


# Display Options

Last Modified on 05/16/2024 6:35 pm EDT

## Calendar

Menu path: Calendar

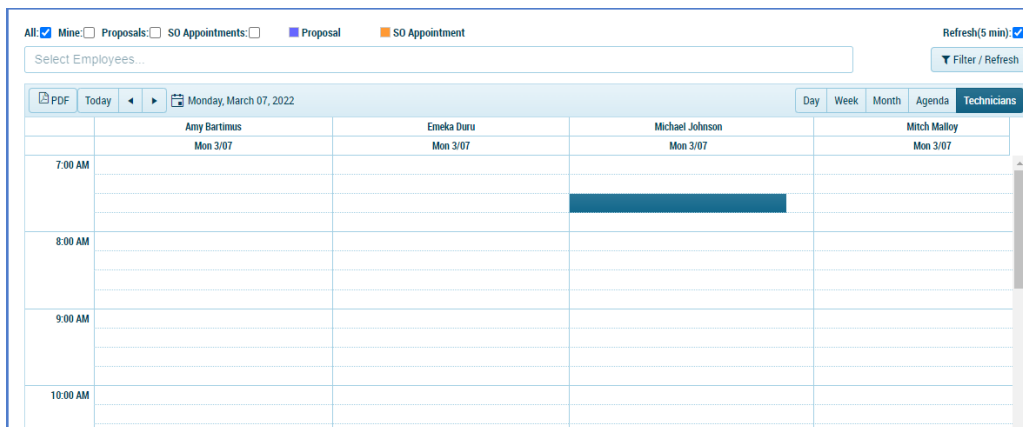


## Display Options

### Checkboxes

At the top of the Calendar are several checkboxes – each is described below.

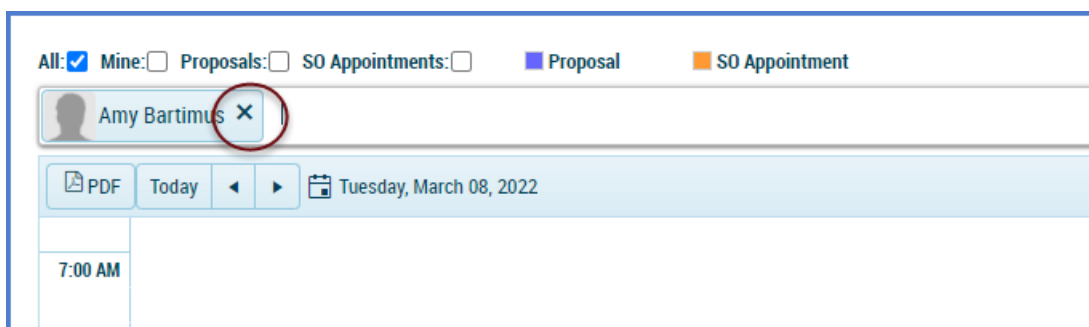
- All: This displays appointments (sales and miscellaneous) for all salespeople and technicians based on the options Day, Week, Month, Agenda, or Technician.
- Mine: This displays the appointments for the current user logged into SalesAutomation.
- Proposals: This displays the sales appointments created with the proposal from the quick quote for all salespeople based on the options Day, Week, Month, Agenda, or Technician.
- SO Appointments (SedonaOffice): This displays the miscellaneous appointments for technicians based on the options Day, Week, Month, Agenda, or Technician.



## Select Employees

A user can select one or more employees to limit the results on the calendar to only those employees selected.

A user can clear the employees selected using the 'X'.



## Double click the appointment to view the Event Details.

- Information is view only.
- Appointment Details include the Title, Type, Start and End Date, Description, and Employee.
- View Proposal button opens the proposal related to the appointment.
- Appointment information includes Proposal number (PR#), Time Window, Job Type, Map Code, and URL of the proposal.

Event

View Proposal

Appointment Details

Customer: Kyle Martin - 1035  
 Site: Kyle Martin - QQ1  
 System: A New System - QQ1-4547824

Address1  
 Ashley, OH 43003

Title:

Type: Proposal

Start: 2/25/2022 4:06 PM

End: 2/25/2022 5:06 PM

Description:

Employee: Unassigned Salesperson

Cancel

## Refreshes in 5 minutes

If this checkbox is selected, the Calendar will refresh every five minutes to update with any appointments created by other users.

All:  Mine:  Proposals:  SO Appointments:  Proposal SO Appointment

Select Employees...

Refresh(5 min):

Filter / Refresh

PDF Today Monday, March 07, 2022 Day Week Month Agenda Technicians

	Amy Bartimus	Michael Johnson	Mitch Malloy
	Mon 3/07	Mon 3/07	Mon 3/07
7:00 AM			
8:00 AM			

## Filter/Refresh

A user should refresh the data with any changes to the filters, appointment types, dates, etc. to assure the information is based on the most recent selection.

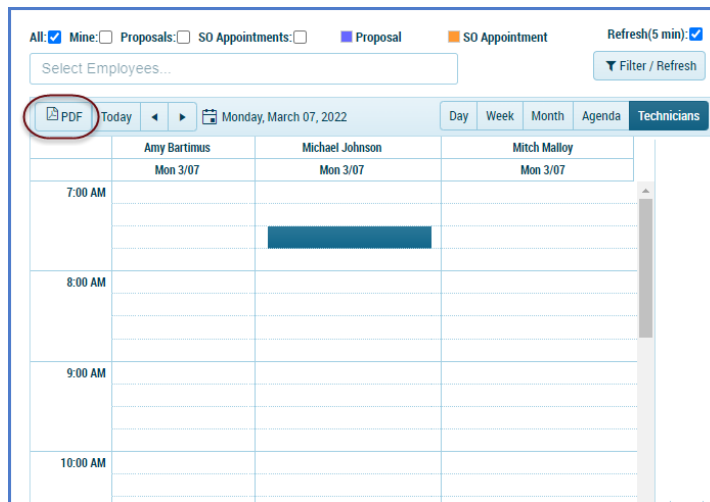
## Show Full Day

Clicking this button will display the calendar in full 24 hours versus business hours.



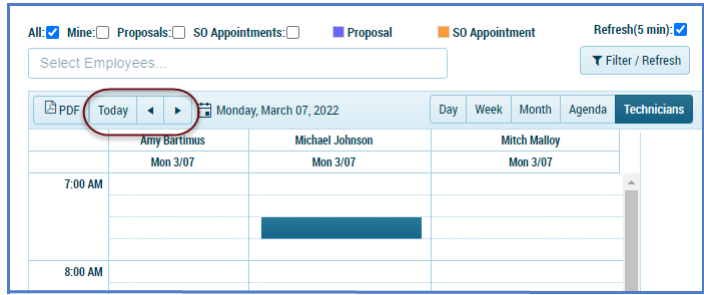
## PDF Button

Clicking the PDF button exports the currently viewed data.



## Today Right/Left Arrows

Clicking the right or left arrows will display the Calendar for previous or future dates.



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## How to Manage Sales Prospects

