

New Work Order Appointment

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How to add a new work order appointment to your calendar.

Work Order Appointment

If you would like to schedule a work order appointment, select "Work Order" from the dropdown box in the "Type" field.

The screenshot shows a web-based form titled "Event" with a close button (X) in the top right corner. The form is divided into two main sections. The left section contains fields for "Title" (Installation), "Type" (Work Order, highlighted with a purple oval), "Start" (7/12/2016 9:00 AM), "End" (7/12/2016 11:00 AM), "0 Additional Days" (button), and "All day event:" (checkbox). The right section contains a "Create New Work Order From This Appointment" checkbox, "Customer:" (Grossman, Matt - 1028), "Work Order:" (Burglar Alarm Installation - 1319), "Dispatch" (input field with "Now" button), "Arrival" (input field with "Now" button), "Completed" (input field with "Now" button), "Description:" (Burglar Alarm Installation), "Tech:" (Sam Clyde), and "Sync:" (checkbox checked). At the bottom right of the form are "Save" and "Cancel" buttons.

Fill Out Fields

Title

Fill out the appointment title.

Start

Select the date and time the appointment is starting.

End

Select the date and time the appointment is ending.

Additional Days

If you wish to duplicate this appointment on multiple dates, click the "Additional Days" box and click the other dates

you want this appointment to occur. These additional appointment(s) will be exact copies of the first appointment.

All Day

If you check this box, the technician's entire day will be blocked out as busy on the calendar

Create New Work Order From this Appointment

Check this box if this work order appointment is not linked to an existing work order. If this is the case then a new work order will be generated after you create this appointment. If you check this box, you will then need to choose the customer, site, and system (if applicable) to link the work order to from the dropdown boxes below.

Customer

Select the customer you would like to link this appointment to.

Work Order

Select the work order this appointment is linked to from the dropdown box.

Dispatch

Enter the technician's dispatch time (not required).

Arrival Time

Enter the time the technician arrives at the site.

Completed Time

Enter the time the technician completes the appointment.

*Note: To track billable minutes, the technician (or you) will need to complete the "Arrival Time" and "Completed time" Fields.

Description

Enter a description of the appointment

Tech

Enter the technician for this appointment.

*Note: If you wish to have multiple technicians for one appointment you will need to create a duplicate appointment and link it to another technician.

Sync

Check this box if you would like AlarmBiller to automatically notify attendees if the work order is changed.

Save

Click "Save" in the bottom right corner to update.

Notification Confirmation

