New Work Order Appointment

Last Modified on 11/08/2016 10:14 pm EST

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.

ent						
Title:	Installation		Create New Work Order From This Appointme			
Туре:	Work Order	Customer:	Grossman, Matt - 1028			
Start:	7/12/2016 9:00 AM	Work Order:	Burglar Alarm Installation - 1319	9 •		
End:	7/12/2016 11:00 AM	Dispatch	# •		Now	
	0 Additional Days All day eve	ent: 🗆 Arrival		•	Now	
		Completed		Ö	Now	
		Description:	Burglar Alarm Installation			
		Tech:	Sam Clyde ×			
		Sync: 🖸				
ll Out Field	s			Sav	ve Ca	
l out the app	pointment title.					
rt						
lect the date	e and time the appoitment is starting					
1						
ect the date	e and time the appointment is ending	•				
ditional Days						
you wish to	duplicate this appointment on multip	ole dates, click the "Ac	Iditional Days" box and cli	ck the oth	ier dat	

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" Fiel ds.

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 li nk 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

Notify the technician (by email and text), the customer (by email), both, or neither about the appointment by clicking the corresponding button.

² Notification Confirmation									
d 🛛 Notify Technician	⊠ Notify Customer	🔊 Notify Both	× Do Not Notify						

New Work Order

If you selected "Create New Work Order from this Appointment" then you will be taken page for the new work order you created. Many of these fields will be prepopulated based on what you entered in the calendar fields but can be overridden. Click "Save" in the upper right corner to continue.

Site: #1 Matt Grossman - 11	System:	System: Burglar Alarm-123964 Panel Type: Vista 100 Control Panel Location: Service Level: T&M			Туре:	Inspection • New •		
Tax: None - 0.000%	·				Status:			
11 Eastway					Salesperson:			
Huntington, GA 11111 Requested By	Service L				Technician:			
(555) 555-5555	Base	• • • • •	00 Labor: min. Bill After	\$60.00 : 30 min.	Brief Description			
barbie.savani@richmond.edu	Warran	y Labor: Exp	ired: 9/18/2015	90 Day Warranty				
Purchase Order Number	Warra	ity Parts: Exp	ired: 9/18/2015	90 Day Warran	250 characters remaining			
Service Fee Labor \$75.00 \$0.00		ltems F \$35.00 \$		Tax \$0.00	Total \$110.00		RMR \$0.00	
Appointments Items	Parts RMR	Notes	Complete	System Parts	System Notes	Docs		

The will take you to the work order details page. Click "Calendar" on the top of the screen to go back to the calendar.

Your work order appointment will appear at the date and time you scheduled it highlighted in gray.

	Oliver Astra	Sam Clyde	Ethan David	Lo	ena Mobley	Unassigned Salesperson	Barbie Savani	Brad Solomon	lan User	
	Tue 7/12	Tue 7/12	Tue 7/12		Tue 7/12	Tue 7/12	Tue 7/12	Tue 7/12	Tue 7/12	-
	Tue 1/12	100 1/12	Tue 1/12				Tue 1/12	Tue // 12	Tue // 12	
all day										
7:00 AM	WO#1408/1284 Astra, Oliver - Inspection Inspection Apple Lane Matt Grossman 137									
	Schofield Avenue Dudley,									
8:00 AM	office meeting:	office meeting:	office meeting:	office						
			11.1	meeting:	W0#1308/12					
										1
		\frown								
9:00 AM		WO#1319/1287 Clyde, Sam - Burglar Alarm	WO#1318/1286 David,							
		Installation	Ethan - Burglar Alarm - Installation							
		Installation Matt	Alarm Installation Matt Grossman Matt							
		Grossman Matt Grossman 11 Eastway	Grossman Matt Grossman 11 Eastway							
10:00 AM		Huntington, GA 11111	Huntington, GA 11111							
			Burglar Alarm - #123964							
11:00 AM										