SCHEDULE

User Guide

Exported: 11/17/2023

Version 4.0

Legal Declarations

Table of Contents

Overview

When you log into Schedule, service appointments, job appointments, and technician activities are loaded onto the schedule board. Schedule lets dispatchers easily schedule appointments by using a visual representation of service calls and jobs that includes assigned, unassigned, and unscheduled appointments.

To access Schedule's full capability, we recommend Google Chrome[1] or other non-Microsoft browsers for your internet browser. Microsoft browsers may still be able to access Schedule but you may not have access to all features.

> **Important:** If you intend to use Job Appointments and you also use TimeZone views in Service Management, your users must use the Signature Alternate Dynamics versions of the Customer Maintenance, Customer Address Maintenance, and Customer Class setup windows. These windows contain information that is specifically used by Signature during the appointment scheduling process.

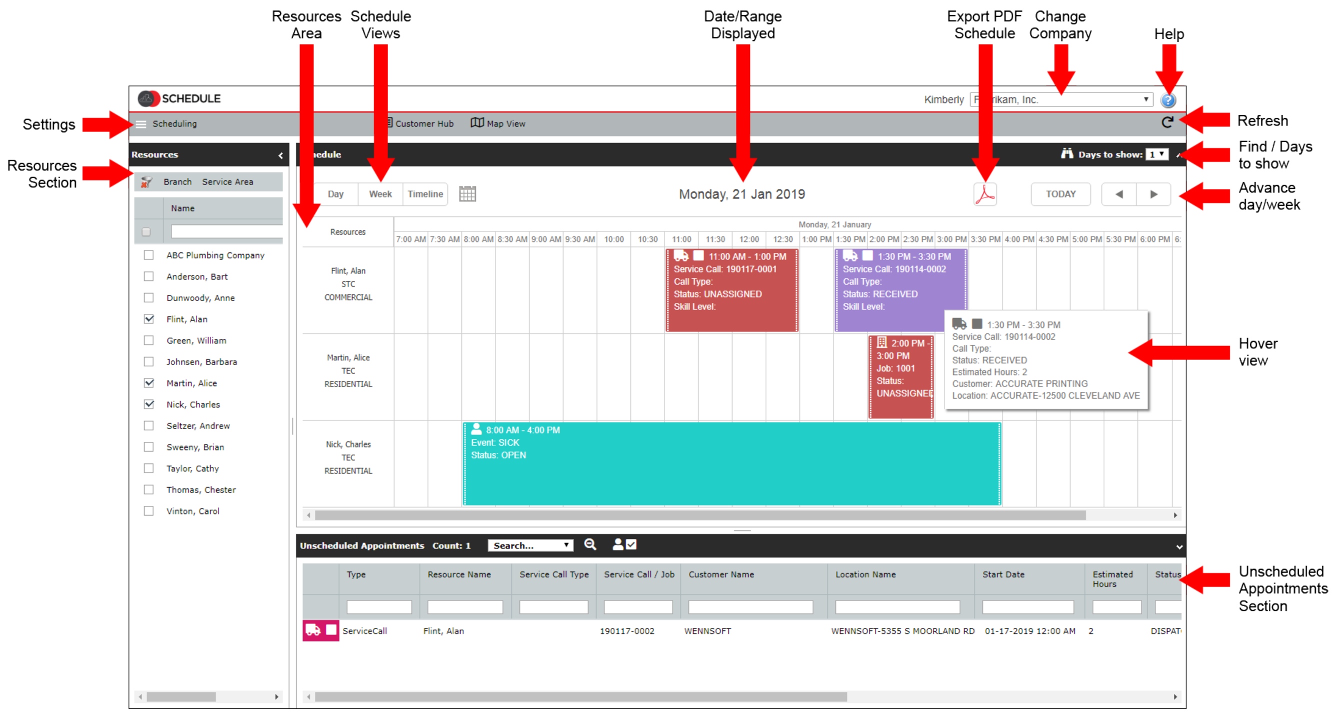
Users can complete these types of activities:

- Service appointment updates
- Technician notifications
- Appointment allocations
- Technician activities updates
- Job activities updates
- Create service calls
- Create notes
- Create service appointments
- Create job appointments
- Create technician activity
- Add attachments

Viewing the schedule board

When you open Schedule, the service appointments, job appointments, and resource activities are loaded onto the schedule board.

1 https://www.google.com/chrome/



Appointments and appointment types

Schedule displays these types of appointments that are created by using Service Management and/or Schedule. Color coding indicates the appointment status per the color configuration in Schedule Settings.

Important: If you intend to use Job Appointments and you also use TimeZone views in Service Management, your users must use the Signature Alternate Dynamics versions of the Customer Maintenance, Customer Address Maintenance, and Customer Class setup windows. These windows contain information that is specifically used by Signature during the appointment scheduling process. to set up GP Customers and Addresses/Locations. Failure to use the Alternate Customer Maintenance window will result in job appointments not being properly displayed in Schedule.

Appointment type	Where it is created
Service appointments	• From service calls in Service Management. • From MobileTech • From service calls created in the Schedule Customer Hub. • From the Appointment Wizard in Schedule. • From the schedule board in Schedule.
Job appointments	• Using the Job Maintenance window in Job Cost. • Using the Appointment Wizard in Service Management. • From MobileTech • From the schedule board in Schedule.

Appointment type	Where it is created
	• From the Appointment Wizard in Schedule.
Resource activities	• Using the Technician Entry Activity Wizard in Service Management. • Using the Appointment Wizard in Schedule. • From the schedule board in Schedule.

Context-sensitive menus

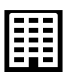
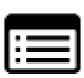
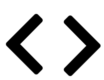
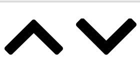
The Schedule Board and Customer Hub allows you to right-click on job/service appointments, resource activities, and resources, to access menus with common tasks that you may need to do. If you do not have access to an appointment type, you will not see this information.

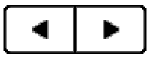
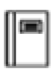
Action	Available on these Appointment Types
Set Status Set or update the appointment or activity status.	• Job appointment • Service appointment • Resource activity
Unschedule Appointment The appointment time is set to 12:00 AM. The appointment is moved from the schedule board to the Unscheduled Appointments section.	• Job appointment • Service appointment • Resource activity
Unassign Appointment The Resource field is updated to UNASSIGNED. The appointment is moved from the schedule board to the Unscheduled Appointments section.	• Job appointment • Service appointment
View Job Details Opens a display-only view of the job details with tabs for the cost codes and subcontractors.	• Job appointment
Open Service Call Opens a window populated with the service call information. If a piece of equipment needs to be added, you can do so here.	• Service appointment
Quick Print Opens the Work Order SRS report with the service call details displayed.	• Service appointment
Print Service Call Provides the opportunity to print service call information.	• Service appointment

Action	Available on these Appointment Types
Appointment Wizard Opens the appointment wizard.	• Job appointment • Service appointment • Resource activity • Resource
New Service Call - <customer>-<location> Opens the New Service Call window on the Schedule tab with the Customer Number, Customer Name, Location Name, Division, Bill Customer Name, and the Bill Address Code defaulting from the service appointment (Schedule) or the customer/location (Customer Hub).	• Service appointment • Customer/location (Customer Hub)
Create New Appointment Opens the New Appointment/Activity window to create a new appointment based on the current appointment.	• Job appointment • Service appointment • Resource activity
Add Appointment Note Adds a note to the service appointment.	• Job appointment • Service appointment
View Customer Details Opens the Customer Hub with the customer/location highlighted and the information displayed in the details section.	• Job appointment • Service appointment
View Location Details Opens the Customer Hub with the customer/location highlighted and the information displayed in the details section.	• Job appointment • Service appointment
New Resource Activity Opens the New Resource Activity window with resource information in the Resource field.	• Resource
Print Resource Schedule • **Schedule Resource Report** Prints the technician's schedule for the day. • **Report Wizard** Opens the Resource Schedule Report wizard. You can choose the report to print, a date range, who the report is run for, as well as for which technician(s).	• Resource
Unschedule All Unschedules all appointments for the resource. The time is set to 12:00 AM. Appointments move from the schedule board to the Unscheduled Appointments list.	• Resource

Action	Available on these Appointment Types
Unassign All Unassigns all appointments for the resource. The resource is set to UNASSIGNED. Appointments move from the schedule board to the Unscheduled Appointments list.	• Resource

Icons and buttons

Icon or button	Description
	Displays or hides the navigation pane.
	Refreshes the schedule board.
	Indicates a service appointment.
	Indicates a job appointment.
	Indicates a resource appointment.
	Show All Resources in Unscheduled Appointments.
	Choose to open the Customer Hub (in a separate browser window).
	Choose to open the Map and Route Resources window.
	Direction arrows to open/collapse section. The arrows point in the direction that the window will open/collapse.
	Direction arrows to open/collapse section. The arrows point in the direction that the window will open/collapse.

Icon or button	Description
	Choose to select a specific date to display on the schedule.
	Moves the schedule forward or back by one day.
	Choose to print a service call quick print.
	Indicates that the service call has no attachments. Choose this to open the Add Attachment window.
	Indicates an attachment is available. Choose this to open the Attachments window.
	Indicates that the service call or appointment has no notes added. Choose this to add a note.
	Indicates that the service call or appointment has at least one attached note. Choose this to open the Notes window.
	This icon displays if the service call has the **Date/Time Lock** marked in Service Management. This option prevents the call from being rolled forward.

Filtering and sorting in Schedule

Filtering and sorting on the Customer Hub

Filtering, sorting, and rearranging data

Use your mouse to drag or select options below:

- **Group**
  To group the display by a column, select a column header and drag this to the area labeled *Drag a column header to the group location to group the results by that column* located to the top left of the columns. To undo

the grouping, drag the column header back to anywhere on the grid, the column header returns automatically to its original location.

> ⚠ This option may not be available, depending on the window you are viewing.

- **Sort order**
  Select the column header to change the sort order. A small triangle points to indicate if the sorting is ascending (A-Z) or descending (Z-A). Hold the Shift key when selecting headers to sort against multiple columns simultaneously.
- **Filter**
  Select the lookup to choose a filter type (contains, does not contain, starts with, ends with, equals, does not equal) and enter the value in the field to the right of the lookup.
- **Column Order**
  Drag the column headers to the left or right to change the column order. The Customer and Location columns each have a main column header that lets you drag all three columns (Notes, Name, ID) at the same time. You can also rearrange the Notes, Name, and ID columns beneath both the Customer and Location headers.
- **Scrolling**
  A horizontal scrollbar is hidden until you hover with your mouse at the bottom of the grid. When the horizontal scrollbar displays, you can drag the bar to view more columns. A vertical scrollbar is automatically displayed.

Buttons on this window

Button	Description
	Find For information on locating records in the Customer Hub using the *Find* icon, see Locating a record using Find (see page 8). ⚠ This button may not be available, depending on the window you are viewing.
	Delete Select an appointment and then select to delete the appointment. ⚠ This button may not be available, depending on the window you are viewing.
	Clear Filter Choose to clear the current search results filters.
	Refresh Reloads the results from the database.
	Export Select to export all data or selected rows. This icon displays for the main Customer Hub list as well as some of the detail tabs (Open Appointments, Service Calls, Equipment, Contacts, Contracts, and Jobs)

Button	Description
	This button may not be available, depending on the window you are viewing.
	Column Tool Use the Column Tool to select fields to display from a list of available columns. Mark to display the checkbox, unmark the checkbox to hide.

Filtering and sorting the unscheduled/unassigned appointments

You can filter and/or sort the information displayed in the Unscheduled/Unassigned grid.

- **Filtering** - Use the fields below the column headers to enter filtering criteria to limit the appointments that display in this section.
- **Sorting** - Sort the columns by selecting the column header. A small triangle points to indicate if the sorting is ascending (A-Z) or descending (Z-A).

Locating a record using Find

Choose the **Find** icon on either the Schedule Board (to search for appointments) or the Customer Hub (to search for location contacts) to open the Find window. The find types vary based on where the Find window was opened.

1. On the Schedule Board or Customer Hub, choose the **Find** icon.
2. Select the **Find Type**:
   a. **If searching from the Schedule Board:**
      - **Service Call**
        Search for service appointment(s) using a partial or full service call number.
      - **Purchase Order**
        Search for a service appointment using the customer purchase order associated to the service call(s).
      - **Jobs**
        Search for job appointment(s) using a partial or full job number.
      - **Project**
        Search for job appointment(s) using a partial or full project number.
      - **Resources**
        Search for all appointments associated with a single resource (technician) ID.

   b. **If search from the Customer Hub:**
      - **Contact Name**
        Search for location contacts using a partial or full contact name.
      - **Phone Number**
        Search for a customer using a full or partial customer phone number.
      - **Maintenance Contract**
        Search for a customer and location using a full or partial maintenance contract number.
3. Enter the **Find Data**.
4. Enter the **From/To Dates**. The default dates reflect the Unscheduled Date range from Schedule Settings. (For more information, see Setting up company options[2].)

2 https://docs.key2act.io/display/SCHEDULE3/Setting+up+company+options

> ⚠ The date range is only displayed on the Find window accessed from the Schedule Board.

5. Choose **Find**. Schedule searches for records that contain the criteria you entered. For example, if you enter 201 when searching for a service call, all service calls that contain "201" will be returned (4201, 20111, 98201, etc.).
6. The search results display.
7. Use the context menu to act on a record returned by the Find process. The context menu can be opened by using the right-click of the mouse while positioned on any returned record in the result set. You may also double-click on the row to open the record. See Using the context-sensitive menus (see page 0) below for more information.

Working with the search results

In the search results section, you can sort and/or filter the results by the following methods:

Filtering, sorting, and rearranging data

Use your mouse to drag or select options below:

- **Group**
  To group the display by a column, select a column header and drag this to the area labeled *Drag a column header to the group location to group the results by that column* located to the top left of the columns. To undo the grouping, drag the column header back to anywhere on the grid, the column header returns automatically to its original location.

  > ⚠ This option may not be available, depending on the window you are viewing.

- **Sort order**
  Select the column header to change the sort order. A small triangle points to indicate if the sorting is ascending (A-Z) or descending (Z-A). Hold the Shift key when selecting headers to sort against multiple columns simultaneously.
- **Filter**
  Select the lookup 🔍 to choose a filter type (contains, does not contain, starts with, ends with, equals, does not equal) and enter the value in the field to the right of the lookup.
- **Column Order**
  Drag the column headers to the left or right to change the column order. The Customer and Location columns each have a main column header that lets you drag all three columns (Notes, Name, ID) at the same time. You can also rearrange the Notes, Name, and ID columns beneath both the Customer and Location headers.
- **Scrolling**
  A horizontal scrollbar is hidden until you hover with your mouse at the bottom of the grid. When the horizontal scrollbar displays, you can drag the bar to view more columns. A vertical scrollbar is automatically displayed.

Buttons on this window

Button	Description
	**Find** For information on locating records in the Customer Hub using the *Find* icon, see Locating a record using Find (see page 8). This button may not be available, depending on the window you are viewing.
	**Delete** Select an appointment and then select to delete the appointment. This button may not be available, depending on the window you are viewing.
	**Clear Filter** Choose to clear the current search results filters.
	**Refresh** Reloads the results from the database.
	**Export** Select to export all data or selected rows. This icon displays for the main Customer Hub list as well as some of the detail tabs (Open Appointments, Service Calls, Equipment, Contacts, Contracts, and Jobs) This button may not be available, depending on the window you are viewing.
	**Column Tool** Use the Column Tool to select fields to display from a list of available columns. Mark to display the checkbox, unmark the checkbox to hide.

Using the context-sensitive menus

Context-sensitive menus are available by right-clicking on any of the search results. The options you may see depend on the Find Type and the status of the results. For example, View on Calendar is only available if the appointment is currently on the Schedule Board.

- **Open Service Call**
  Opens the service call window. The Find window closes.
- **Open Appointment**
  Opens the appointment window. The Find window closes.

- **Unassign Appointment**
  Updates the resource on the appointment to UNASSIGNED.
- **Unschedule Appointment**
  Updates the appointment time to 12:00 AM.
- **View on Calendar**
  Displays the appointment on the Schedule Board. The appointment is temporarily displayed with a red shaded background with yellow text. The Find window closes.
- **View Job Details**
  Opens the Job Details window. The Find window closes.
- **View Customer Details**
  Opens the Customer Hub with the focus on the customer with the Customer details displayed at the bottom of the window. The Find window closes.
- **View Location Details**
  Opens the Customer Hub with the focus on the customer and location with the Location details displayed at the bottom of the window. The Find window closes.

Viewing your user profile

You can access your Schedule user profile by choosing the drop-down next to your name displayed in the top right corner. You also have the ability to change your password in this window.

The user profile window displays the following information:

- **Your name**
  Displays your name associated with your user profile.
- **Email address**
  Displays the email address set up for your user profile.
- **ERP User Account**
  This is the user name for the enterprise resource planning (ERP) software.
- **Default Company**
  Displays the default company, if one has been assigned by the Schedule administrator.
- **Role**
  Displays your user role.
- **Time Zone Description**
  Displays the time zone you are in.

  > The Time Zone Description displays if Time Zone Views is enabled in Signature.

- **Affiliate/Region/Branch**
  Displays the affiliate, region, and branch that you are assigned to.

  > The Affiliate/Region/Branch information displays if you have Global Filtering turned on in Microsoft Dynamics GP.

Changing your Schedule password

1. Access your Schedule user profile by choosing the drop-down next to your name displayed in the top right corner in Schedule.
2. Choose the Change Password icon to open the Change Password window.
3. Enter your current password.

4. Enter the new password.
5. Confirm the new password.
6. Choose *CHANGE PASSWORD*.

Logging out of Schedule

1. You can log out of Schedule by choosing the drop-down next to your name displayed in the top right corner.
2. Select *Logout*.

Setting up Schedule

Schedule settings can only be accessed by users with Administrator rights.

Administration setup

With Schedule, you can create users and assign each user to a role. The users are mapped to their corresponding user login in Signature.

Complete the following setup options:

- Processing requests (see page 12)
- Setting up users (see page 12)
- Working with roles (see page 13)

Processing requests

- **Reset resource location to home location**
  At the end of the work day, the technician's location is at the last appointment for the day. Choosing this option resets the starting locations for all resources as set up on the Resource Options tab. See Setting up resource options (see page 20) for more information.
- **Get latitude and longitude for service locations**
  Choose this to get the latitude and longitude for service locations. This will not overwrite any previously-entered values. If you do not have a Bing or Google API key, you will be limited to 2500 records per day.
- **Copy Company Settings**
  If you have more than one company, you can copy the configuration and color settings to another company.

  > The form field setup options are not copied.

Setting up users

When logging in for the first time in Schedule, the administrator needs to create their user profile by completing the **Detail** section as well as the User Roles section.

1. Access **Schedule** from the URL link that was provided to you during setup.
2. Use the predefined *username* and *password* that was provided to you.
3. Choose the **Hamburger menu** ☰ in the top left corner next to Scheduling.

4. Choose **Administration**.
5. Choose the **User Detail** tab.
6. In the Users section, choose + *New User.*
7. In the Detail section, enter the user information in the **Detail** section.
    - **User Name**
      This is the username that is used to log into Schedule.
    - **First/Last Name**
      Enter a first and last name.
    - **Email Address**
      Enter an email address.
    - **Time Zone**
      Choose the time zone
    - **ERP User ID**
      From the drop-down, choose the username that is used in Microsoft Dynamics GP for the user.
    - **Default Company**
      Choose the default company. This is the company that will display, but you are able to change the company. See Changing companies (see page 24) for more information.
    - **Disabled**
      This checkbox is used to disable user.
    - **Password/Confirm Password**
      Enter the password to use for logging into Schedule. Re-enter the password in the **Confirm Password** field.
8. Choose *Save*.
9. The user will be added to the *Users* section.

Working with roles

Schedule has two pre-defined roles that cannot be disabled, *Administrator* and *Dispatcher*. You can create additional roles for your users, but a user can only be assigned to one role.
The User Roles window has three sections.

- **Roles**
  Displays the user roles. You can use the filter fields to narrow the listing of roles by entering a few letters for role and/or description.This section also contains the *New Role* and *Copy Role* buttons.
- **Role Detail**
  This section is used to create and/or disable a role.
- **Role Permissions**
  You can assign view/edit/delete permissions for the areas listed.

Creating a new role

1. In Schedule, choose the **Hamburger menu** ≡ in the top left corner next to Scheduling.
2. Choose **Administration**.
3. Choose the **User Roles** tab.
4. In the **Roles** section, choose *New Role*.
5. In the **Role Detail** section, enter the **Role** and **Description**.

   > ⚠ To disable a role, mark the **Disabled** checkbox.

6. Choose *Save*.The role displays in the **Roles** section.

Assigning permissions to a role

1. With the created role highlighted, in the Role Permissions section you can choose the **Role Permissions**.
2. Mark or unmark the View, Edit, or Delete columns for the listed areas.
3. Choose the *Save* icon.

Assigning user roles

A user is limited to one role, although one role may be assigned to more than one user.

1. In Schedule, choose the **Hamburger menu** ☰ in the top left corner next to Scheduling.
2. Choose **Administration**.
3. Choose the **User Detail** tab.
4. In the **Users** section, choose the user.
5. In the **User Roles** section, choose *Assign Role*.
6. In the **Available Roles** window, mark the **Role** checkbox.
7. Choose *Assign Roles*.

Deleting roles

A role can only be deleted if it is not assigned to users.

1. In Schedule, choose the **Hamburger menu** ☰ in the top left corner next to Scheduling.
2. Choose **Administration**.
3. Choose the **User Detail** tab.
4. In the **Users** section, choose the user.
5. In the **User Roles** section, choose *Assign Role*.
6. In the **Available Roles** window, right-click on the role and then choose *Delete*.

General setup

The general setup consists of setting up options for each of your companies as well as global options that apply to all the companies.

Complete the following setup options:

- Setting up company options (see page 14)
- Setting up global options (see page 17)

Setting up company options

These settings are defined for each company that you have.

> ⚠ Depending on the Appointment Auto Reload setting under Global Options (see page 17), you may need to choose the Refresh button at the top right of the Scheduling view to see your changes.

- Setting up schedule configuration (see page 15)

Setting up schedule configuration

1. In Schedule, choose the **Hamburger menu** ☰ and then choose *General Settings*.
2. In **Company Options** under Schedule Configuration, complete the following fields, as needed:
   - **Schedule Days to Retrieve on Load (1-14)**
     Enter the number of schedule days to display.
   - **Unscheduled Days to Retrieve on Load (1-60)**
     Enter the number of unscheduled days to display.
   - **Time View Bar Height (pixels 20-200)**
     Enter the height of the resources rows that display on the schedule board.
   - **Week View**
     - **Number of Days in Week View**
       Enter the number of days to display in the Week View.
     - **Skip Saturday/Sunday**
       Mark the checkbox next to the weekend days to not display on the schedule.
   - **Default Start Time**
     Enter the default start time to use when creating new service appointments, job appointments, or resource activities.
     - Appointment Wizard or New Resource Activity when accessed from right-clicking on a Resource.
     - New Service Appointment or New Job Appointment windows by right-clicking on an existing appointment on the Schedule Board or in the Customer Hub and selecting New Appointment from the context menu.

     > ⚠ When right-clicking in a time cell on the Schedule Board, the Appointment Wizard and New Resource Activity start time will default to that time slot time.

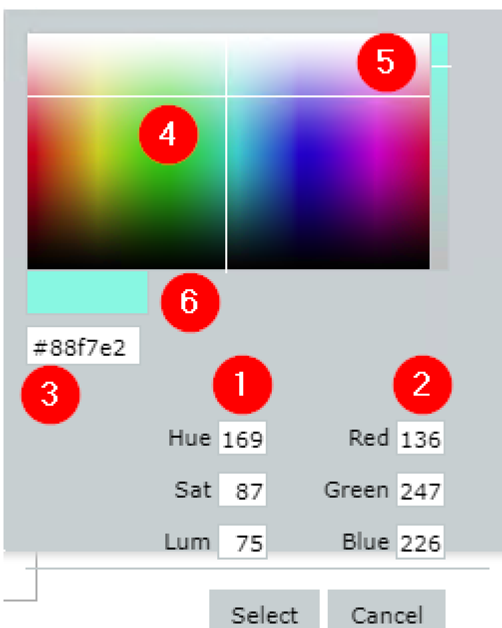
   - **Schedule Visible Hours**
     Enter the start and end time to display on the schedule.
   - **Automatic Status Assignment (Drag & Drop)**
     Choose the status to automatically update after dragging from the Unscheduled grid to the schedule board for the following options. If the option is left blank, the status will not automatically update.
     - **Unassigned Update**
     - **Unscheduled Update**
     - **Scheduled Update**
     - **Unschedulable Status**
       This status applies to dragging to the schedule board as well as within the schedule board.
       Two examples:
       - Unschedulable Status set to Waiting for Parts, this will prevent this appointment from being dragged to the schedule board. The status would have to be manually updated in appointment details and then dragged.
       - Unschedulable Status set to Closed - This will prevent the closed appointment from being dragged to a different time slot or resource.
     - **Mapping Options**
       See Map View setup (see page 19).
3. Choose *Save*.

Setting up schedule colors

1. In Schedule, choose the **Hamburger menu** and then choose *Settings*.
2. Under Company Options, in the **Schedule Configuration** section, you can set up custom colors for the background of the work order on the schedule as well as the small square icon within that service call that indicates a property that you define. See [Setting up custom colors .
    - **Status Background Colors**
      This is the color of the service call as displayed on the schedule and in the unscheduled list.
    - **Work Order Icon Colors**
      The service call icon displays within the service call as displayed on the schedule as well as in the unscheduled list.Choose one of the following properties to indicate what information your dispatchers need to know at a glance. After choosing the property, a list of options displays related to that property.
        - Use Work Order Type
        - Use Work Order Problem
        - Use Division
        - Use Service Area
3. Choose *Save*.

Setting up custom colors

You have several options available to set the color of the service call status or the service call icon. The color picker automatically displays when you choose the field to the right of the label. After the color has been set up for the field, choose *Select*.



1. **HSL** - Enter the hue, saturation, and lightness numbers.
2. **RGB** - Enter the red, green, and blue numbers.
3. **HEX** - Enter the six character code.
4. **Color picker** - Use the cross hair to choose a color.
5. **Saturation** - For any of the above methods, you can darken or lighten the color by using the slide bar on the right side.
6. **Color sample** - Displays the color that will be used.

In the example below, the following color settings have been set: Default background color (fuchsia), Unscheduled background color (purple), Maintenance Contract icon (green).

Setting up fields to display

In the Service Call & Appointment Form Fields section, you can choose the fields to hide/display when you open the service call, service appointment, job appointment, and/or resource appointment. Each service call or appointment has required fields that cannot be unchecked.

1. In Schedule, choose the **Hamburger menu** ≡ and then choose *General Settings*.
2. In **Company Options** under **Service Call & Appointment Form Fields**, choose to hide/display fields from the following tabs:
    - Service Call Fields
    - Service Appointment Fields
    - Job Appointment Fields
    - Resource Appointment Fields
3. Choose *Save* at the bottom of each tabbed window.

Setting up global options

The Global Options settings are for all companies. After making the changes, choose the *Save* button.

> ⚠ Depending on the appointment auto reload setting, you may need to choose the *Refresh* button at the top right of the Scheduling view to see your changes.

- Schedule Time Scale (see page 17)
- Appointment Auto Reload (see page 18)
- Date Display Setting (see page 18)
- Show Horizontal Scrollbar (Timeline view) (see page 18)
- Show Job Panel (see page 18)
- Display Resource Overallocation (Timeline view) (see page 18)
- Max Attachment Size (MB) (see page 18)
- Clearing Cache (see page 18)
    - Clear Customer Hub Cache (see page 18)
    - Clear Application Cache (see page 19)

Schedule Time Scale

Choose the time scale to display on the schedule.

- 15 Minutes
- 30 Minutes

- 60 Minutes

Appointment Auto Reload

Choose to have the schedule automatically update as well as the refresh rate by entering the number of minutes (1-60) next to **Time Period**.

Date Display Setting

Choose the date format to display.

- **MM-DD-YYYY** - 10-23-2021
- **DD-MM-YYYY** - 23-10-2021
- **YYYY-MM-DD** - 2021-10-23

Show Horizontal Scrollbar (Timeline view)

Mark this checkbox to display a horizontal scrollbar when you are in the Timeline view on the Schedule Board. This checkbox defaults to unmarked (hidden).

- If unmarked, the Timeline view hourly columns are condensed to display the **Days to show** setting on one screen. The **Days to show** drop-down is found in the top right on the Schedule Board.
- If marked to show the horizontal scrollbar in the Timeline view, the hourly day columns are not condensed and you may need to scroll to view additional days, depending on the **Days to show** display setting.

Show Job Panel

Mark this checkbox to display the Job Panel on the right side of the Schedule Board. This option is available if you have Signature Job Cost registered. See Working with the Job Panel (see page 51).

Display Resource Overallocation (Timeline view)

Choose to display the overallocation of resources in the Timeline view.

Max Attachment Size (MB)

Enter the maximum MB file size for attachments.

Clearing Cache

The Clear Cache buttons are also available by selecting the **Hamburger menu** ☰ and then choosing *About*.

Clear Customer Hub Cache

If you find that the Customer Hub does not open when you select the Customer Hub button from the Schedule Board, you may need to clear the Customer Hub cache. Clearing the cache on your machine will allow it to open again.

Clear Application Cache

Clearing the Application Cache will clear out all the data in the LocalStorage that we use to pass data between the Schedule and Customer Hub tabs. After they are cleared, we reset the selected resources, reload the service options and the time zones.

Map View setup

Setting up mapping involves enabling the mapping option and its associated setup as well as setting up the starting location for the resources that will be displayed on the map.

The following steps be completed to use the mapping feature:

- Setting up mapping options (see page 19)
- Setting up resource options (see page 20)
- Setting up vehicles (see page 20)

Setting up mapping options

1. In Schedule, choose the **Hamburger menu** ☰ and then choose **General Settings**.
2. In Company Options under Schedule Configuration, in the Mapping Options section, choose one of the following:
    - If you do not want to use the mapping feature, mark **No Mapping**.
    - To use mapping, mark either **Google** or **Bing** and then enter your **Key**.
        - Google Maps: https://cloud.google.com/maps-platform/pricing/ (You will need an API key that includes Maps and Routes. You do not need Places.)
        - Bing Maps: https://www.microsoft.com/en-us/maps/licensing/options
3. Complete the following setup options:
    - **Use Status to Trigger Resource Location Change**
      If marked, when an appointment status is changed to the specified Status, the location of the technician will update on the map.
    - **Break Duration (min)**
      Enter the number of minutes for a technician's break that will be used if you are route planning.
    - **Round-up Start Time**
      Choose the number of minutes to round up to the start time.
    - **Icons**
      You can accept the default icons that display on the map or you can choose different icons at http://fontawesome.io/icons/
4. Choose *Save*.

When the Google or Bing APIs are called

- **Get Latitude/Longitude option**
  This process sends 1 request per Service Location address for only those locations that do not yet have latitude/longitude. Once a location has Latitude/Longitude values, Schedule never calls the API again for that location. MobileTech also updates Latitude/Longitude on locations, so a customer who has been using MobileTech may see that some locations already have Latitude/Longitude values. In Schedule, this is the *Get Latitude/Longitude* option in the Process Requests tab in Administration Setup. See Processing requests (see page 12) for more information.

- **Process Resource Home Locations**
  The first time this process is run, 1 request per Technician is sent because it is passing in their starting address to get a returned Latitude/Longitude. After that, there is no call to Google or Bing API when they are reset to their starting point. We simply copy the defined Latitude/Longitude into the associated vehicle record. The only time it would run again is to get new Latitude/Longitude for new technicians. This is the *Process Resource Home Locations* in the Process Requests tab in Administration Setup. See Processing requests (see page 12) for more information.
- **Creating new customer locations in Schedule**
  A request is sent to get Latitude/Longitude for the new address. See Creating a new customer (see page 74) or Creating a new location (see page 74).
- **Displaying the map**
  Each display of the map is a single request. It passes in an array of Latitude/Longitude values and the API plots those locations on a map. Each time a map is displayed or refreshed is an API request.
- **Optimizing the route for a single technician**
  Google has an additional map option that is the **Optimize Route** feature available when viewing the map for a single technician. In that case, using this feature makes an additional single *request* to the Route API.

Setting up resource options

If you will be using Map View, you will need to set up each resource's **Start Location** and if most resources start at the office, you can select multiple resources (CTRL+select) and then enter the office location. For resources starting from their home, choose the resource and then enter their address.

1. In Schedule, choose the **Hamburger menu** in the top left corner next to Scheduling.
2. Choose *Administration*.
3. Choose the **Resource Options** tab.
4. If all or some of your technicians will be starting from the home office, you can multi-select them from the list and then enter the Home Address information and Save.
5. If some of your technicians are starting from a different location, select the technician and then enter the Home Address information and Save.
6. If you are using Advanced Communications (HTML email notifications to customers), you can enter each technician's information.

   For more information on setting up Advanced Communications, see Advanced Communications[3] in the *Signature Agent Configuration* documentation.

Setting up vehicles

Technicians can be assigned to a specific vehicle in Signature. Schedule uses this information when using the Mapping feature.

To set up the vehicle complete the following steps:

1. Choose *Microsoft Dynamics GP* > *Tools* > *Setup* > *Service Management* > *Lookup Setup* > *Technicians* > *Vehicles*.
2. Complete the following fields:
   - **Vehicle ID**
     Enter the company vehicle ID.
   - **Technician ID**
     Choose the Technician ID who will be assigned to the vehicle.

3 https://docs.key2act.io/display/SIGAGENT/Advanced+Communications

- **Vehicle ID Number (VIN)**
  Enter the VIN number.
- **Description**
  Enter a description of the vehicle.
- **Vehicle Status**
  Enter the status of the vehicle.

3. If the vehicle is no longer active, mark the **Inactive** checkbox.
4. Choose *Save*.

Report setup

The following reports need to be manually deployed and have their locations set:

- Resource Schedule (see page 21)
- Job Schedule by Cost Code (see page 22)

Resource Schedule

The Resource Schedule report included with Schedule needs to moved, deployed, and have the location path set for each user's computer that will be accessing Schedule.

Copy to local SSRS location

1. Go to Schedule's installation location and then *Schedule* > *WebServiceFiles* > *SSRS Reports*.
2. Copy *Resource Schedule.rdl*. You can either right-click on the file name and then choose *Copy* or you can highlight the file name, choose *Edit* and then choose *Copy*.
3. Paste the **Resource Schedule.rdl** file in the *Signature Service* reports location. *Microsoft Dynamics\GPxxxx\Signature\SRS Reports\Signature Service*

Deploy the report

1. Launch Microsoft Dynamics GP and then go to *Microsoft Dynamics GP* > *Tools* > *Setup* > *Service Management* > *Module Setup* > *Service Options*.
2. Under **Reporting** at the bottom of the window, choose *Run Wizard* and then choose *Continue*.
3. Choose *Next*.
4. Complete the server information and choose *Next*.
5. Choose the **System Database** and then choose *Next*.
6. Verify the information and choose *Next*.
7. In the next window, unmark all checked boxes.
8. Expand **Signature Service**. by choosing the **+**.
9. Mark the checkbox next to **Resource Schedule** and choose *Deploy*.
10. After the report has deployed, you are returned to the Report Wizard window. Choose *Cancel* to close the window.Repeat this for any additional company databases.

Set location path

1. Launch and connect to the SQL Server.
2. Use the following SQL statement to update the Resource Report ReportLocation, replacing Report URL with your actual report URL.

UPDATE WSRepts SET ReportLocation = 'Report URL' WHERE ReportReference = 'Schedule_Resource_Report_1'

Job Schedule by Cost Code

The Job Schedule by Cost Code report is included with Signature 2018 R4. This report needs to be deployed and have the location path set for each user's computer that will be accessing Schedule.

Deploy the report

1. Launch Microsoft Dynamics GP and then go to *Microsoft Dynamics GP* > *Tools* > *Setup* > *Service Management* > *Module Setup* > *Service Options*.
2. Under **Reporting** at the bottom of the window, choose *Run Wizard* and then choose *Continue*.
3. Choose *Next*.
4. Complete the server information and choose *Next*.
5. Choose the **System Database** and then choose *Next*.
6. Verify the information and choose *Next*.
7. In the next window, unmark all checked boxes.
8. Expand **Job Cost**. by choosing the **+**.
9. Mark the checkbox next to **Job Schedule by Cost Code** and choose *Deploy*.
10. After the report has deployed, you are returned to the Report Wizard window. Choose *Cancel* to close the window.Repeat this for any additional company databases.

Set location path

1. Launch and connect to the SQL Server.
2. Run the following SQL statement to update the Job Schedule by Cost Code ReportLocation, replacing Report URL with your actual report URL.

   UPDATE WSRepts SET ReportLocation = ' `Report URL` ' WHERE ReportReference = 'Job Schedule by Cost Code'

Email notification setup

Advanced Communications is an add-on product that provides you with the ability to send the following appointment trigger emails to your customers from within Schedule. You can send the advanced HTML email notification in Schedule from the appointment window or by right-clicking the appointment and then choosing *Notify Customer*.

In addition to the default standard triggers[4], Advanced Communications provides you the ability to notify the customer and/or technician when the following appointment triggers occur:

- Technician Arrived
- Technician in Route (Dispatched)
- Appointment Completed

4 https://docs.key2act.io/display/NewTopics/Working+with+Event+Trigger+Notifications#WorkingwithEventTriggerNotifications-default-standard

You can set up standard or Advanced Communication notification emails that will be sent to customers and/or technicians for the stages of an appointment. See the *Signature Agent Configuration* documentation.

Using the Schedule Board

With Schedule, changes made to appointments and service calls update Signature immediately. When you have made changes to appointment details, within Service Management or Job Cost, or with settings, you may need to refresh the schedule board to see these updates. A reload occurs in these scenarios:

- Automatically, as defined by the interval in the **Automatic Reload** section of the Global Options window in General setup[5].
- Manually, when you choose the *Refresh Appointments* icon or use the keyboard key combination Ctrl + F5.

> To access Schedule's full capability, we recommend Google Chrome[6] or other non-Microsoft browsers for your internet browser. Microsoft browsers may still be able to access Schedule but you may not have access to all features.

Use the steps in this section to complete everyday tasks on the schedule board.

Double-booking and appointment conflicts

The ability to double-book a resource is set up in Service Management. In Schedule, *where* you create the appointment matters regarding the ability to double-book a resource when your setup does not allow double-booking.

If you create a service appointment in Schedule that conflicts with another appointment and double booking is not allowed:

- **Schedule board**
  You will receive a message indicating that double booking is not allowed for the resource. You will not be able to create the appointment for that resource. See Creating additional appointments (see page 38) for information on creating an appointment from the schedule board.
- **Appointment wizard**
  The appointment will be created. The Appointment Wizard does not check the double-book set up status. See Using the Appointment Wizard (see page 24) for information on creating appointments with the wizard.

When you create a service appointment in Schedule and double booking is allowed, the appointment is created.

Changing the schedule board view

You can customize the schedule board view. Changing the view does not change the content that is displayed on the schedule board. However, changing the view lets you customize what you see on your board, depending on the size of your monitor and other display properties.

The following changes can be made:

- Change the schedule view (see page 24)
- Viewing appointments for other days or months (see page 24)

5 https://docs.key2act.io/display/NewTopics/General+setup
6 https://www.google.com/chrome/

Change the schedule view

By default, the schedule board is displayed in the Timeline view (horizontal day), but you can switch between the views using the view buttons located in the menu area on the schedule board. Use the horizontal scrollbar to scroll to the right/left of the schedule for any of the views.

- **Day**
  For the selected day of week, technical resources are listed horizontally, while the hours of the defined business day are listed vertically.
- **Week**
  For the selected number of days, technical resources are listed horizontally while the hours of the defined business day are listed vertically.
  - Use the left/right arrows (to the right of the TODAY button) to scroll to the next/previous week.
  - If you have more than 7 technicians selected in the resource list, use the right arrow button that is in the top right of the last day displayed to scroll through the technicians, without advancing to the next week.
- **Timeline**
  For the selected day(s), technical resources are listed vertically, while the hours defined for the business day are listed horizontally. You can restrict the number of days to display (up to 5 days) by choosing appropriate number in the **Days to show** drop-down in the far right corner of the schedule.
  - 15 Minutes
  - 30 Minutes
  - 60 Minutes

Viewing appointments for other days or months

On the right side of the toolbar, use the single arrows to move forward or backward one day or week at a time, depending on the view.

You can also use the *Calendar* icon to choose a specific date.

Changing companies

If you need to switch to a different company, in the top right corner of the window, choose the drop down field that is displaying the default company name. Choose the company to switch to.

Working with appointments and service calls

Important: If you intend to use Job Appointments and you also use TimeZone views in Service Management, your users must use the Signature Alternate Dynamics versions of the Customer Maintenance, Customer Address Maintenance, and Customer Class setup windows. These windows contain information that is specifically used by Signature during the appointment scheduling process.

Using the Appointment Wizard

The Appointment Wizard helps you to quickly create single or recurring activities or job/service appointments for technician(s), a technician team, or a service area. Appointments created with the Appointment Wizard are assigned a

Group ID. You can use the Group ID to view related appointments from the Service Appointment, Service Call, and/or Job Appointment windows. See Working with related appointments and/or resource activities (see page 40) for more information.

A validation window displays after you've selected the Create button that displays the appointment count, primary key elements (Job/Cost Code, Service Call ID, Activity ID), date range, and resource count. This gives you the opportunity to review the appointments/activity prior to creating so that you can cancel in case you've made an error in the Appointment Wizard.

1. From the schedule board, right-click on a resource, any appointment/activity, or in an empty cell on the schedule board.
2. Choose *Appointment Wizard*.
3. Mark the radio button for who you are creating this activity/appointment for.
    - **All**
      All technicians will be assigned.
    - **Technician**
      One or more technicians selected will be assigned. You can also choose UNASSIGNED.

      > The technician name defaults in if you are accessing the Appointment Wizard from the Schedule Board. If you select a service call or job that the technician does not have access to (based on Global Filtering), the Resource field is cleared so that you can choose the appropriate technician. You can edit or add additional technicians from the Resource drop-down.

    - **Technician Team**
      All technicians within the selected team will be assigned.
    - **Service Area**
      All technicians within the service area selected will be assigned.
4. Choose the **Appointment Type**:
    - Service Call Appointment (see page 25)
    - Job Appointment (see page 26)
    - Technician Activity (see page 26)

Service Call Appointment

Continuing from the steps above for creating a single or recurring service appointment:

1. Choose the **Appointment Type** of Service Call.
2. Choose the **Service Call**.
3. Choose the **Resource**, **Technician Team**, or **Service Area** to assign the appointment to. If you chose to assign this to **All**, these fields will be disabled.
4. Enter a **Description**.
5. Choose the **Appointment Status**.
6. The **Start Date** defaults to today's date and midnight. You can edit the date and time.

   > The time defaults in if you are accessing the Appointment Wizard from an empty cell on the Schedule Board, the time defaults from the time cell that you right-clicked on. The time is editable.

7. The **End Date** defaults to today's date.
8. Enter the **Estimated Hours**.
9. Enter the number of **Days Between Appointments**. For example, if you have a date range entered above and enter 2, this will create an appointment every two days.
10. Mark the weekend days to **Skip** from scheduling appointments. Both Saturday and Sunday default as marked to skip.

11. Choose *Create*.
12. Review the validation window, then choose to continue or cancel the process.

> If the Start Date is scheduled for a weekend day that you have marked to *skip*, a message displays and you will need to change the Start Date or remove the checkmark to allow scheduling on the Start Date weekend day.

Job Appointment

1. Choose the **Appointment Type** of Job.
2. Choose the **Job Number**.
3. Choose the **Cost Code**.
4. Choose the **Technician**, **Technician Team**, or **Service Area** to assign the appointment to. If you chose to assign this to **All**, these fields will be disabled.
5. Enter a **Description**.
6. Choose the **Appointment Status**.
7. The **Start Date** defaults to today's date and midnight. You can edit the date and time.

> If you are accessing the Appointment Wizard from an empty cell on the Schedule Board, the time defaults from the time cell that you right-clicked on. The time is editable.

8. The **End Date** defaults to today's date.
9. Enter the **Estimated Hours**.
10. Enter the number of **Days Between Appointments**. For example, if you have a date range entered above and enter 2, this will create an appointment every two days.
11. Mark the weekend days to skip from scheduling appointments.
12. Choose *Create*.
13. Review the validation window, then choose to continue or cancel the process.

> If the Start Date is scheduled for a weekend day that you have marked to *skip*, a message displays and you will need to change the Start Date or remove the checkmark to allow scheduling on the Start Date weekend day.

Technician Activity

1. Choose the **Appointment Type** of Technician Activity.
2. Choose the **Activity ID**.
3. Choose the **Technician**, **Technician Team**, or **Service Area** to assign the appointment to. If you chose to assign this to **All**, these fields will be disabled.
4. Enter a **Description**.
5. Choose the **Appointment Status**.
6. The **Start Date** defaults to today's date and midnight. You can edit the date and time.

> If you are accessing the Appointment Wizard from an empty cell on the Schedule Board, the time defaults from the time cell that you right-clicked on. The time is editable.

7. The **End Date** defaults to today's date.
8. Enter the **Estimated Hours**.

9. Enter the number of **Days Between Appointments**. For example, if you have a date range entered above and enter 2, this will create an appointment every two days.
10. Mark the weekend days to skip from scheduling appointments.
11. Choose *Create*.
12. Review the validation window, then choose to continue or cancel the process.

Making appointment changes on the schedule board

You can change the time of an appointment by clicking and dragging the appointment bar or by changing the start time, start date, resource, and/or estimated hours.

Change the time of an appointment for the same day

Click and drag

1. Choose the appointment, holding the left mouse button down to display a pointing finger .
2. Move the appointment to the new time. The time change is displayed as you drag the appointment. When you are finished, release the mouse button.

Changing the time

- Double-click the appointment and edit the time in the Start Date field.

Change the length of an appointment

You can change the length of an appointment by clicking and dragging the beginning or end of the appointment bar.

1. Hover over the left or right edge of the appointment bar, depending on whether you are changing the start or end time. You will see a double arrow ↔ .
2. Holding the left mouse button down, drag the appointment left or right. The time change is displayed as you drag the appointment. When you reach the correct appointment length, release the mouse button.

You can also double-click the appointment to open the Appointment window to edit the Estimated Hours.

Viewing/editing job appointment details

You can easily view and change the details of a job appointment, also called a job activity.

1. Double-click the job appointment to view or change the appointment. This can be a scheduled appointment or an unassigned appointment.
2. The Job Appointment Details window displays. You can view and change the appointment information. Additional fields may display depending on Schedule settings.
    - Job - Display only
    - Appointment - Display only
    - Description

- Cost Code
- Status
- Resource
- Start Date
- Estimated Hours
- Priority
- Completion Date - Can be edited if the appointment status is set to completed.
- Actual Hours
- Service_User_Define_1
- Service_User_Define_2
- Service_User_Define_3
- Service_User_Define_7
- Customer Name
- Location Name - Billing address

3. You can also choose these buttons to complete other tasks.

	Save
	Cancel
	Delete Appointment
	View Job
	View Appointment History - See Viewing appointment history (see page 34)
	View/add Appointment Notes - See Working with notes and attachments (see page 48). If a note exists for this appointment, this icon displays as .
	View/add Attachment - See Working with notes and attachments (see page 48).
	View Related Appointments - To view the related by appointments by the Group ID, choose the drop-down next to the Related Appointments icon and then choose *By Group ID* . See Working with related appointments and/or resource activities (see page 40) .

4. Choose *Save*.

Context-sensitive options for job appointments on the Schedule Board

Right-click on a job appointment on the Schedule Board to access the following options:

- **Set Status**
  Set or update the appointment status.

    - ARRIVED
    - CLOSED
    - COMPLETE- See Completing appointments (see page 38).
    - DISPATCHED
    - IN ROUTE
    - OPEN
    - PAGED
    - RE-ASSIGN
    - RECEIVED
    - UNASSIGNED
- **Unschedule Appointment**
  The appointment time is set to 12:00 AM. The appointment is moved from the schedule board to the Unscheduled Appointments section. See Unscheduled or unassigned appointments[7].
- **Unassign Appointment**
  The Resource field is updated to UNASSIGNED. The appointment is moved from the schedule board to the Unscheduled Appointments section. See Unscheduled or unassigned appointments[8].
- **View Job Details**
  Opens a display-only view of the job details with tabs for the cost codes and subcontractors.
- **Appointment Wizard**
  Opens the appointment wizard. See Using the appointment wizard[9] for more information.
- **Create New Appointment**
  Opens the New Appointment/Activity window to create a new appointment based on the current appointment. See Create additional appointments[10].
- **Add New Appointment Note**
  Adds a note to the appointment. See Working with notes[11].
- **View Customer Details**
  Opens the Customer Hub with the customer/location highlighted and the information displayed in the details section. See Using the Customer Hub[12] for more information.
- **View Location Details**
  Opens the Customer Hub with the customer/location highlighted and the information displayed in the details section. See Using the Customer Hub[13] for more information.

Viewing/editing service appointment details

You can easily view and edit the details of a service appointment.

1. Double-click the service appointment . This can be a scheduled or unassigned appointment.
2. The Service Appointment Details window displays. You can view and change the appointment information. Additional fields may display depending on Schedule settings.
    - Service Call - Display only
    - Appointment - Display only
    - Description
    - Status
    - Resource
    - Start Date

7 https://docs.key2act.io/display/SCHEDULE3/Unscheduled+or+unassigned+appointments
8 https://docs.key2act.io/display/SCHEDULE3/Unscheduled+or+unassigned+appointments
9 https://docs.key2act.io/display/SCHEDULE3/Using+the+appointment+wizard
10 https://docs.key2act.io/display/SCHEDULE3/Create+additional+appointments
11 https://docs.key2act.io/display/SCHEDULE3/Working+with+notes+and+attachments#Workingwithnotesandattachments-notes
12 https://docs.key2act.io/display/SCHEDULE3/Using+the+Customer+Hub
13 https://docs.key2act.io/display/SCHEDULE3/Using+the+Customer+Hub

- Estimated Hours
- Priority
- Completion Date - Display only
- Customer Name
- Location Name

3. You can also choose these icons to view additional information.

	Save
	Cancel
	Delete Appointment
	View Service Call - See Viewing/editing the service call (see page 31).
	View Service Call Time Stamps - See Viewing service call timestamps (see page 33).
	View Appointment History - See Viewing appointment history (see page 34).
	View Service Call Tasks - See Viewing service call tasks (see page 35).
	View/add Appointment Notes - See Working with notes and attachments (see page 48) . If a note exists for this appointment, this icon displays as .
	View/add Attachment - See Working with notes and attachments (see page 48).
	Notify Customers - See Notifying customers via email (see page 37).
	View Related Appointments - To view the related by appointments by the Group ID, choose the drop-down next to the Related Appointments icon and then choose *By Group ID*. See Working with related appointments and/or resource activities (see page 40).
	Work Order Quick Print

4. Choose *Save*.

Context-sensitive options for service appointments on the Schedule Board

Right-click on a service appointment to access the following options:

- **Set Status**
  Set or update the appointment status.
  - ARRIVED
  - CLOSED
  - COMPLETE- See Completing appointments (see page 38).
  - DISPATCHED
  - IN ROUTE
  - OPEN
  - PAGED
  - RE-ASSIGN
  - RECEIVED
  - UNASSIGNED
- **Unschedule Appointment**
  The appointment time is set to 12:00 AM. The appointment is moved from the schedule board to the Unscheduled Appointments section. See Unscheduled or unassigned appointments (see page 39).
- **Unassign Appointment**
  The Resource field is updated to UNASSIGNED. The appointment is moved from the schedule board to the Unscheduled Appointments section. See Unscheduled or unassigned appointments (see page 39).
- **Open Service Call**
  Opens a window populated with the service call information. If a piece of equipment needs to be added, you can do so here.
- **Notify Customer**
  Sends the customer an email. See Notifying customers via email (see page 37).
- **Quick Print**
  Opens the Work Order SRS report with the service call details displayed.
- **Print Service Call**
  Prints the service call information.
- **New Service Call - <customer>-<location>**
  Opens the New Service Call window with the Customer Number, Customer Name, Location Name, Division, Bill Customer Name, and the Bill Address Code defaulting from the service appointment. You can also access this by right-clicking on a Customer/location from the Customer Hub.
- **Appointment Wizard**
  Opens the appointment wizard. See Using the Appointment Wizard (see page 24).
- **Create New Appointment**
  Opens the New Appointment/Activity window to create a new appointment based on the current appointment. See Creating additional appointments (see page 38).
- **Add New Appointment Note**
  Adds a note to the appointment. See Working with notes (see page 48).
- **View Customer Details**
  Opens the Customer Hub with the customer/location highlighted and the information displayed in the details section. See Using the Customer Hub (see page 53).
- **View Location Details**
  Opens the Customer Hub with the customer/location highlighted and the information displayed in the details section. See Using the Customer Hub (see page 53).

Viewing/editing the service call

You can easily view the service call from:

- The schedule board by right-clicking a service appointment and then choosing *Open Service Call*.
- The service appointment by choosing the *View Service Call*  icon.
- The Customer Hub by:

- Double-clicking on the the service call in the Service Call tab to view the Service Call window on the Schedule tab.
- Right-clicking on a call in the Service Call tab to view the Service Call window on the Schedule tab. (See Viewing the Service Calls tab (see page 60) for more information.)

Viewing or editing the service call:

1. The following fields can be edited:

   > The fields displayed may depend on Schedule Settings.

   - **Description**
     Enter a brief description of the reason for the call.
   - **Problem Type**
     Use the drop-down to select a Problem Type.
   - **Division**
     Use the drop-down to select a Division.
   - **Salesperson**
     Use the drop-down to select a Salesperson
   - **Service Call Type**
     Use the drop-down to select a Service Call Type.
   - **Priority**
     This field is restricted to a single alphanumeric character. 1 is the highest priority; None, the lowest.
   - **Customer P.O. Number**
     Enter an alphanumeric Purchase Order Number.
   - **Contract Number**
     You can assign contract numbers to all types of service calls.
   - **Equipment**
     If the service call already has equipment assigned in Service Management, the field in Schedule is display-only. Only equipment that is active for the customer and location can be selected.
   - **Resource**
     The technician assigned to the service call.
   - **Start Date and Time**
     The date and start time of the service call.
   - **Date/Time Lock**
     Prevents the call from being rolled forward when Auto-Roll Calls Forward is used. A *Date/Time Lock* icon is displayed on the service appointment in Schedule when this is turned on. This option is available if the service call has one appointment. If the service call has more than one appointment, this option is not available.
   - **Estimated Hours**
     The amount of time it takes to complete the service appointment.
   - **Service Call Status**
     Use the drop-down to select the Service Call Status.
   - **Resolution**
     Use the drop-down to select the Resolution.
   - **Job Number**
     Use the drop-down to select a Job Number.
   - **Original Service Call**
     Use the drop-down to select an original Service Call Number.
   - **Caller Name/Email/Phone**
     Enter a Caller Name, Email, and/or Phone number.
   - **USER-DEFINED fields**
     Enter information in the USER-DEFINED fields. The labels are set up in Service Management.

- **Service_User_Define_1**
  Enter information in the Service_User_Define_1 field. The label is set up in Service Management.

2. You can choose any of these icons to view additional information:

	Save
	Cancel
	View Service Call Time Stamps - See Viewing service call timestamps (see page 33).
	View Appointment History - See Viewing appointment history (see page 34)
	View Service Call Tasks - See Viewing service call tasks (see page 35).
	View/add Appointment Notes - See Working with notes and attachments (see page 48). If a note exists for this appointment, this icon displays as .
	Attachments - See Working with notes and attachments (see page 48) .
	View Related Appointments - To view the related by appointments by the Group ID, choose the drop-down next to the Related Appointments icon and then choose *By Group ID* . See Working with related appointments and/or resource activities (see page 40) .

3. Choose *Save*.

Viewing service call timestamps

You can use the Time Stamp for Service Call ## window to view the time stamping information. If you are using our optional Service Level Agreements module, the time stamp fields display with a red background for any missed guaranteed times.

1. To access the Time Stamp for Service Call ## window, in the Service Appointment window, choose the *View Service Call Time Stamps* icon.
2. The Time Stamp window displays the following information:
   - Date opened
   - Service call date
   - User ID
   - The actual Stamped Time/Date and the Guaranteed Time/Date for the following time stamp fields:
     - Open
     - Dispatched
     - Received
     - Arrived
     - Completed

Viewing appointment history

If you marked the option to Keep Appointment History in the Service Options window in Signature, you can view all changes made to an appointment. The three appointment actions that are tracked in the window are: Insert, Update, and Delete. Information is recorded when an appointment is created, when changes are made to it, and when it is deleted.

The following columns display:

- Action (Insert, Update, or Delete)
- Skill Level
- Technician
- Priority
- Task Date
- Estimated Hours
- Appointment Status
- Completion Date
- Actual Hours
- Modified Date
- Modified User
- Tool ID
- Service Call ID
- Appointment
- Cost Code

Filtering, sorting, and rearranging data

Use your mouse to drag or select options below:

- **Group**
  To group the display by a column, select a column header and drag this to the area labeled *Drag a column header to the group location to group the results by that column* located to the top left of the columns. To undo the grouping, drag the column header back to anywhere on the grid, the column header returns automatically to its original location.

  > ⚠ This option may not be available, depending on the window you are viewing.

- **Sort order**
  Select the column header to change the sort order. A small triangle points to indicate if the sorting is ascending (A-Z) or descending (Z-A). Hold the Shift key when selecting headers to sort against multiple columns simultaneously.
- **Filter**
  Select the lookup 🔍 to choose a filter type (contains, does not contain, starts with, ends with, equals, does not equal) and enter the value in the field to the right of the lookup.
- **Column Order**
  Drag the column headers to the left or right to change the column order. The Customer and Location columns each have a main column header that lets you drag all three columns (Notes, Name, ID) at the same time. You can also rearrange the Notes, Name, and ID columns beneath both the Customer and Location headers.
- **Scrolling**
  A horizontal scrollbar is hidden until you hover with your mouse at the bottom of the grid. When the horizontal scrollbar displays, you can drag the bar to view more columns. A vertical scrollbar is automatically displayed.

Buttons on this window

Button	Description
	Find For information on locating records in the Customer Hub using the *Find* icon, see Locating a record using Find (see page 8). This button may not be available, depending on the window you are viewing.
	Delete Select an appointment and then select to delete the appointment. This button may not be available, depending on the window you are viewing.
	Clear Filter Choose to clear the current search results filters.
	Refresh Reloads the results from the database.
	Export Select to export all data or selected rows. This icon displays for the main Customer Hub list as well as some of the detail tabs (Open Appointments, Service Calls, Equipment, Contacts, Contracts, and Jobs) This button may not be available, depending on the window you are viewing.
	Column Tool Use the Column Tool to select fields to display from a list of available columns. Mark to display the checkbox, unmark the checkbox to hide.

Viewing service call tasks

You can view the tasks that are associated with a service call by choosing the *Service Call Tasks* icon in the Service Appointment and Service Call windows. If a task includes subtasks, you can view these by selecting the drop-down icon to the left of the task code.

- Task Code
- Description
- Estimate Hours
- Skill Level
- Equipment ID

- Sublocation
- Task Status
- Completion Date

Filtering, sorting, and rearranging data

Use your mouse to drag or select options below:

- **Group**
  To group the display by a column, select a column header and drag this to the area labeled *Drag a column header to the group location to group the results by that column* located to the top left of the columns. To undo the grouping, drag the column header back to anywhere on the grid, the column header returns automatically to its original location.

  > This option may not be available, depending on the window you are viewing.

- **Sort order**
  Select the column header to change the sort order. A small triangle points to indicate if the sorting is ascending (A-Z) or descending (Z-A). Hold the Shift key when selecting headers to sort against multiple columns simultaneously.
- **Filter**
  Select the lookup to choose a filter type (contains, does not contain, starts with, ends with, equals, does not equal) and enter the value in the field to the right of the lookup.
- **Column Order**
  Drag the column headers to the left or right to change the column order. The Customer and Location columns each have a main column header that lets you drag all three columns (Notes, Name, ID) at the same time. You can also rearrange the Notes, Name, and ID columns beneath both the Customer and Location headers.
- **Scrolling**
  A horizontal scrollbar is hidden until you hover with your mouse at the bottom of the grid. When the horizontal scrollbar displays, you can drag the bar to view more columns. A vertical scrollbar is automatically displayed.

Buttons on this window

Button	Description
	Find For information on locating records in the Customer Hub using the *Find* icon, see Locating a record using Find (see page 8). This button may not be available, depending on the window you are viewing.
	Delete Select an appointment and then select to delete the appointment. This button may not be available, depending on the window you are viewing.

Button	Description
	Clear Filter Choose to clear the current search results filters.
	Refresh Reloads the results from the database.
	Export Select to export all data or selected rows. This icon displays for the main Customer Hub list as well as some of the detail tabs (Open Appointments, Service Calls, Equipment, Contacts, Contracts, and Jobs) This button may not be available, depending on the window you are viewing.
	Column Tool Use the Column Tool to select fields to display from a list of available columns. Mark to display the checkbox, unmark the checkbox to hide.

Notifying customers via email

You can send the email notification in Schedule from the appointment or service call window by choosing the Notify Customer icon or by right-clicking the appointment or service call and then choosing *Notify Customer*.

For more information about Standard and Advanced Communications, see Working with Event Trigger Notifications[14] in the Signature Agent[15] documentation.

Standard notifications

- Appointment cancelled
- Appointment created and scheduled
- Appointment reassigned
- Appointment rescheduled
- Technician arrived
- Technician checked out
- Service call created
- Service call created by ESMS email

Advanced communication HTML notifications

- Technician arrived
- Technician in Route (Dispatched)

14 https://docs.key2act.io/display/SIGAGENT/Working+with+Event+Trigger+Notifications
15 https://docs.key2act.io/display/SIGAGENT/Signature+Agent

- Appointment Completed

Creating additional appointments

You might need to schedule an additional appointment for a job appointment, service appointment, or service call, to account for additional – and possibly unexpected – work.

To create an additional appointment:

1. Right-click on:
    - An existing appointment on the Schedule Board.
    - An existing appointment in the Unscheduled Appointments section on the Schedule Board.
    - From the Customer Hub, on an appointment in the Open Appointments tab.
    - From the Customer Hub, on a service call in the Service Calls tab.
2. Choose *New Appointment*.

    > If you are creating the appointment from the Customer Hub, you will need to click on the Schedule tab to access the Create Appointment window.

3. The **Start Date** defaults to the date of the original appointment. You can either manually enter the date and time or you can use the date/time picker. See Using the date/time picker (see page 39) for more information.
4. Enter any additional information as needed.
5. Choose *Save* to add the appointment to the schedule.
6. You can update the appointment by either dragging and dropping or you can double-click the appointment.

Completing appointments

To complete an appoint you can:

- Right-click on the appointment, choose **Status** and then choose **COMPLETE**.
- Double-click an appointment, change the **Status** in the appointment details window to **COMPLETE**, and then choose *Save*.

When an appointment is completed:

- The **Completion Date** field is enabled. The Completion Time is set automatically to display the time based off the Start Time and the Actual Hours.
- The **Actual Hours** field in the appointment details window is enabled. The Actual Hours is initially set to the Estimated Hours. If you edit the Actual Hours, the Completion Time is updated. If you edit the Completion Time, the Actual Hours updates, rounded to 2 decimal places. For example, if the start time is 7:00 AM and the Estimated Hours are 2, the Completion Time is set to 9:00 AM. If you edit the Actual Hours to 3, the Completion Time updates to 10:00 AM. If you edit the Completion Time to 10:45 AM, the Actual Hours updates to display 3.75 hours.
- After an appointment has been completed, you can no longer drag or resize the appointment on the schedule board. However, you can change the appointment length by opening the appointment details window and changing the value in the **Actual Hours** field.

> If appointments are manually completed in Schedule and/or Signature, the system uses the following logic to calculate the completion date and time as an appointment is set to a completed status.
> - The Completion date/time is defaulted to the appointment start time and date plus the actual hours entered by the technician.

- If the technician has not entered actual hours, the calculation will use the estimated hours to determine the completion time.
- If there are no estimated hours (or actual hours) entered in the appointment, the system will use a default duration of 15 minutes so that the appointment remains displayed on the schedule board.

Our goal is to calculate the appointment completion date/time in the most effective manner as this value is not driven by the date/time the service call is physically set to a completed status.

Unscheduled or unassigned appointments

The Unscheduled grid displays all unscheduled or unassigned appointments for the resources that are marked in the Resource list. To view all resources that you have access to view, mark the *Show/Hide Resources* checkbox.

- Filtering and sorting in the Unscheduled/Unassigned grid (see page 39)
- Unscheduling an appointment (see page 39)
- Unassigning an appointment (see page 39)

Filtering and sorting in the Unscheduled/Unassigned grid

You can filter and/or sort the information displayed in the Unscheduled/Unassigned grid.

- **Filtering** - Use the fields below the column headers to enter filtering criteria to limit the appointments that display in this section.
- **Sorting** - Sort the columns by selecting the column header. A small triangle points to indicate if the sorting is ascending (A-Z) or descending (Z-A).

Unscheduling an appointment

To unschedule an appointment, you can do one of the following:

- Right-click the appointment on the schedule board and then choose *Unschedule*.
- Double-click the appointment and then change the **Time** to **12:00 AM**. You can manually highlight the date time and edit the time or you can use the Date/Time Picker. See Using the date/time picker (see page 39) for more information.

Unassigning an appointment

To unassign an appointment, you can do one of the following:

- Right-click the appointment on the schedule board and then choose *Unassign*.
- Double-click the appointment and then change the Resource to *UNASSIGNED*.

Using the date/time picker

The Date/Time Picker is the calendar pop-up that automatically displays when you tab or click in a Start/End date and time field. You will find this field in various windows throughout Schedule. The date picker displays the current month however you can move forward or back to the appropriate month/year using the arrows that display to the right and left of the month/year display. The month and year updates as you change the month/year. The dates of the month also automatically update as you change the month/year.

1. To display the Date Picker in a date field, click the *Date Picker* icon.
2. Use the arrows to select the select the appropriate month. The year will automatically update as you move through the month(s).
3. Choose the **date** or select the *Today* button.
4. To set the time you can either use the spinner buttons or you can highlight the **hour** and/or **minutes** to manually enter the time.
5. Use the drop-down to set the **AM/PM**.
6. Select *DONE* to save the date and/or time.

Working with related appointments and/or resource activities

When you create multiple appointments at one time with the Appointment Wizard, these appointments are assigned to the same Group ID. Use the Related Appointments window, which is accessed by choosing the Related Appointments icon from the Service Appointment, Job Appointment, Service Call, and/or Resource Activity windows.

In the Related Appointments window you can do the following:

- View related appointments (see page 41)
- Reschedule a block of appointments (see page 42)
- Split a block of appointments (see page 43)
- Delete a block of appointments (see page 44)

View related appointments

The Related Appointments window displays the following information, with the specific columns displayed depending on how you've accessed this window. For example, if you are accessing this from a Resource Activity, the Service Call and Job information would not display as this isn't relevant to the Resource Activity.

- Service Call (for Service Appointments and Service Calls)
- Job (for Job Appointments)
- Appointment
- Activity (for Resource Activities)
- Description
- Status
- Resource
- Start Date
- Estimated Hours
- Skill Level
- Priority
- Completion Date

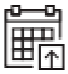
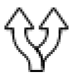
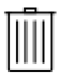
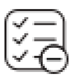
Additional window information

Filtering, sorting, and rearranging data

Use your mouse to drag or select options below:

- **Group**
  To group the display by a column, select a column header and drag this to the area labeled *Drag a column header to the group location to group the results by that column* located to the top left of the columns. To undo the grouping, drag the column header back to anywhere on the grid, the column header returns automatically to its original location.
- **Sort order**
  Select the column header to change the sort order. A small triangle points to indicate if the sorting is ascending (A-Z) or descending (Z-A). Hold the Shift key when selecting headers to sort against multiple columns simultaneously.
- **Filter**
  Select the lookup  to choose a filter type (contains, does not contain, starts with, ends with, equals, does not equal) and enter the value in the field to the right of the lookup.
- **Column Order**
  Drag the column headers to the left or right to change the column order. The Customer and Location columns each have a main column header that lets you drag all three columns (Notes, Name, ID) at the same time. You can also rearrange the Notes, Name, and ID columns beneath both the Customer and Location headers.
- **Scrolling**
  A horizontal scrollbar is displayed if additional columns are available to view. Drag the bar to view more columns. A vertical scrollbar is automatically displayed.

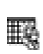
Buttons on this window

Button	Description
	**Reschedule Appointments** Mark appointments and then select to reschedule the appointments. See Reschedule a block of appointments (see page 42).
	**Split Appointments** Mark appointments and then select to open the Split Appointments window. See Split a block of appointments (see page 43).
	**Delete Appointments** Mark appointments and then select to delete the appointment. See Delete a block of appointments (see page 44).
	**Clear All** Select to unselect appointments. You would use this to clear any marked appointments. You can also individually clear a marked check box by clicking on the marked check box to remove the check mark.
	**Clear Filter** Choose to clear the current search results filters.
	**Refresh** Reloads the results from the database.
	**Export** Select to export all data or selected rows. This icon displays for the main Customer Hub list as well as some of the detail tabs (Open Appointments, Service Calls, Equipment, Contacts, Contracts, and Jobs) This button may not be available, depending on the window you are viewing.

Reschedule a block of appointments

You may find that you need to reschedule a several of (or all) appointments that were initially created using the Appointment Wizard (see page 24). When multiple appointments are created using the Appointment Wizard, Schedule assigns these appointments a unique Group ID.   This allows Schedule to easily identify these as related appointments.

To reschedule a group of appointments:

1. Access the Related Appointments window from the Service Appointment, Job Appointment, Service Call, or Resource Activity window.
2. Select the Related Appointments  icon.
3. Select *By Group ID*.

4. In the Related Appointments window, mark the appointments to be rescheduled. You can mark all of the appointments by selecting the checkbox in the same row as the column headers or you can individually mark appointments.

   > Completed appointments may not be selected during this process and these will be ignored by the *Mark All* feature.

5. Select the *Reschedule* icon.
6. In the Reschedule Appointments window, edit any of the following defaulted fields:
   - **Description**
     If needed, you can edit the appointment/activity description.
   - **Appointment Status**
     You can update the appointment status for the selected appointments/activities.
   - **New Start Date**
     You can use the date/time picker to select the date and/or time for the starting date for the selected appointments OR you can highlight the information in the field and type the date and time.
   - **Estimated Hours**
     Update the estimated hours as necessary.
   - **Days between Appointments**
     You can edit the days between appointments if needed.
   - **Skip Saturday/Sunday**
     You can mark/unmark the weekend days as necessary.
7. Choose *Reschedule*.
8. Confirm that you want to reschedule the appointments.

Split a block of appointments

When multiple appointments are created using the Appointment Wizard (see page 24), Schedule assigns these appointments a unique Group ID. This allows Schedule to easily identify these as related appointments.

Splitting a group of appointments allows you to move incomplete appointments as of a select date for the entire group. For example, if you have scheduled a team of resources to be at a job site for two weeks (10 days) and after the first 4 days of work, an emergency comes up where the team needs to be re-routed to a different job, you can split the appointment group and shift out the remaining days of work to begin later in the week or month.

Splitting an appointment group will result in the new subset of appointments being assigned a new Group ID.

To split a group of appointments:

1. Access the Related Appointments window from the Service Appointment, Job Appointment, Service Call, or Resource Activity window.
2. Select the Related Appointments icon.
3. Select *By Group ID*.
4. In the Related Appointments window, mark the appointments to be rescheduled. You can mark all of the appointments by selecting the checkbox in the same row as the column headers or you can individually mark appointments.

   > Completed appointments may not be selected during this process and these will be ignored by the *Mark All* feature.

5. Select the *Split Appointments* icon.
6. In the Split Appointments window, edit any of the following defaulted fields:

- **Description**
  You can edit the appointment/activity description.
- **Appointment Status**
  You can update the appointment status for the selected appointments/activities.
- **New Start Date**
  You can use the date/time picker to select the date and/or time for the starting date of the new appointment group OR you can highlight the information in the field and type the date and time.
- **Estimated Hours**
  Update the estimated hours as necessary.
- **Days between Appointments**
  You can edit the days between appointments if needed.
- **Skip Saturday/Sunday**
  You can mark/unmark the weekend days as necessary.

7. Choose *Split*.
8. Confirm that you want to split the appointments.

Delete a block of appointments

You may find that you need to delete a group of appointments or subset of a group of appointments that were initially created using the Appointment Wizard. When multiple appointments are created using the Appointment Wizard (see page 24), Schedule assigns these appointments a unique Group ID. This allows Schedule to easily identify these as related appointments.

To delete appointments from a group:

1. Access the Related Appointments window from the Service Appointment, Job Appointment, Service Call, or Resource Activity window.
2. Select the Related Appointments icon.
3. Select *By Group ID*.
4. In the Related Appointments window, mark the appointments to be rescheduled. You can mark all of the appointments by selecting the checkbox in the same row as the column headers or you can individually mark appointments.

   Completed appointments may not be selected during this process and these will be ignored by the *Mark All* feature.

5. Select the *Delete* icon.
6. Choose *Delete*.
7. Confirm that you want to delete the appointments.

Working with resources

Use these tasks to work with resource information in Schedule. At this time, a resource is a technician. Dispatchers are associated with a user profile from Service Management that may be associated with a region and/or a branch. The dispatcher will only see the technicians within that region and/or branch.

Marking technicians in the Resource window to display will update the Schedule Board and the Unscheduled Appointments section with the technicians' appointments.

Viewing resource details

To view the resource details, double-click on the resource name from either the **Resources** section or the **Schedule** section.

The Resource Detail window opens. You can view the following information that has been entered in Signature Service Management:

- Resource Type
- Employee ID
- Technician Name
- Primary Skill Level
- Technician Team
- Extended Hours
- Refrigerant Certification #
- Time Zone

You can also view if the resource is Inactive and if Allow Double Booking has been turned on.

Tabs along the bottom of the window displays additional information:

- Branches
- Skill Sets
- Shifts
- Service Area
- Inventory Sites

Unscheduling/unassigning resources

If you need to unschedule or unassign a resource from an appointment, you can do one of the following:

- Right-click the appointment on the schedule board and then choose **Unschedule** or **Unassign**.
- Double-click the appointment and then change the **Time** to **12:00 AM**. and/or update the Resource to **UNASSIGNED**.

Unschedule a resource

To unschedule a resource, you can do one of the following:

- Right-click the appointment on the schedule board and then choose *Unschedule Appointment*.
- Double-click the appointment and then change the **Time** to **12:00 AM**.
- To unschedule all appointments for the resource, right-click on the resource name on the schedule board and choose *Unschedule All*. This will move all appointments for the day to the **Unscheduled Appointments** section. The appointment is still assigned to the technician but is no longer displayed on the schedule board.

Unassign a resource

To unassign a resource, you can do one of the following:

- Right-click the appointment on the schedule board and then choose *Unassign Appointment*.
- Double-click the appointment and then change the Resource to *UNASSIGNED*.
- To unassign all appointments for the resource, right-click on the resource name on the schedule and then choose Unassign All. This will move all appointments for the day to the **Unscheduled Appointments** section.

Identifying over-allocated resources

You can allow for the over-allocation of resources for appointments by using a global setup option in Settings. Resources are considered over-allocated when their number of hours exceeds their shift hours plus their allowed extended hours.

When a resource is over-allocated, the resource name in the **Schedule** area of the schedule board is updated to a pale red.

Generate resource reports

You can create two types of technician reports: one shows a daily view of appointments and the other shows a monthly view of appointments.

1. On the button bar, choose *Reports*. The Technician Report window is displayed.
2. Choose to run a daily or monthly report.
3. Select a technician.
4. Enter the date ranges:
    - To create a daily report, select a start date and enter the number of days that the report should cover.
    - To create a monthly report, enter the month and year for the report.
5. Choose *View Report*. The report is displayed.
6. Choose a printing option:
    - Choose **Print** to print the report.
    - Choose **Page Setup** to change the print properties.
    - Choose **Print Preview** to view an onscreen, printable version of the report.

Creating a resource activity

You can create technician activities from the schedule board. These activities might be for vacation time, sick time, etc. – the same types of activities that you can create in Service Management.

Create technician activities by using the **New Technician Activity** menu option in the **Technicians** area of the schedule board, or by copying an existing activity on the board.

1. In the list of resources on the main schedule board, right-click on the resource and then choose **New Resource Activity**.
2. Complete the fields.
3. Choose *Save*.

Viewing/changing resource activities

You can easily view and change the details of a resource activity.

1. Double-click the resource activity to view or change. The Resource Activity Details window is displayed.
2. You can view and change additional information in these fields.
    - **Technician Name**: The technician who is assigned to this appointment.
    - **Activity**: The type of activity that is being completed, such as jury duty or training.
    - **Appointment Description**: A short description of the activity.
    - **Start Date/Time**: The date and time when the appointment was started.
    - **Estimated Hours**: The estimated length of the appointment.
    - **Appointment Status**: The status of the appointment.
3. You can also choose to *Delete* the activity.

4. Choose *Save*.

Change the start time or length of an activity from the schedule board

You can change the time of an appointment by clicking and dragging the appointment bar or by changing the start time, estimated hours, or both in the appointment details window. Double-click the appointment on the Schedule Board to open the Appointment Detail window.

Change the start time of an activity for the same day

1. Choose the activity, holding the left mouse button down to display a pointing finger .
2. Move the activity to the new time. The time change is displayed as you drag the activity. When you are finished, release the mouse button.

Viewing reports

Daily Schedule Board

This report displays a PDF copy of what is shown on the schedule board.

1. To view this report, choose the *Adobe* icon to the left of the *TODAY* button.
2. In the Save As window, navigate to the location to save the PDF file and choose *Save*.

Resource Schedule

The Resource Schedule report can be printed for a specific resource or you can print this for multiple technicians.

1. Right-click on a resource name from the schedule board.
2. Choose *Print Resource Schedule* and then choose *Schedule_Resource_Report_1*.
3. A new tab is opened in your browser displaying the resource's schedule for the day.
4. If you want to see a range of dates, you can edit the **Start/End Dates** at the top of the report.
5. You can also choose more than one technician from the **Technician** drop-down.
6. Select *View Report*.

Using the Resource Report Wizard

You can also print the Schedule Resource Report by using the report wizard.

1. Right-click on a resource name from the schedule board.
2. Choose *Print Resource Schedule* and then choose *Report Wizard*.
3. In the Resource Schedule Report window, the **Start/End Dates** default to today's date. You can edit these fields to display a range of dates.
4. Choose the **Run For** drop-down and choose an option for who you want to run the report for: All, Technician, Technician Team, Service Area, or Branch.
5. Depending upon your selection, choose one or more technicians, a team, a service area, or a branch.

6. Choose *Run Report*.

Working with notes and attachments

Notes and attachments work the same throughout Schedule.

Working with notes

Available note types are service appointment, job appointment, service call, customer, location, equipment, and contract. Notes can be added from the Appointment context-sensitive menu on the Schedule Board and Customer Hub. Notes can also be accessed from the Appointment windows and the Service Call window.

- If no notes currently exist, choose the *View Notes* icon.
- If notes currently exist, choose the *View Notes* icon. Then choose the *Add Note* icon.

You can view and/or create notes that are related to a/an:

NOTES TABLE	Schedule Board	Customer Hub
Service/Job Appointment	• Double-click the appointment to open the Appointment window. • Right-click the appointment and choose *Add New Appointment Note*.	• Select the customer and then choose the Open Appointments tab. Right-click on the appointment and choose Add Note.
Service Call	• Right-click on the service appointment and choose View Service Call to open the Service Call window.	• Select the customer and then choose the Open Appointments tab. Right-click on the service appointment and choose Open Service Call. • Select the customer and then choose the Service Calls tab. Right-click on the service call and choose Open Service Call.
Customer		• Right-click the customer and choose *Add Customer Note* (or View Customer Notes and then choose the *Add Note* icon).

Location		• Right-click the customer and choose *Add Location Note* (or *View Location Notes* and then choose the *Add Note* icon).
Equipment		• Select the customer and then choose the Equipment tab. Right-click on the equipment and choose *Add Note*.
Contracts		• Select the customer and then choose the Contracts tab. Right-click on the contract and choose *Add Note*.

View or change a service or job appointment note

1. Open the Notes window. See the NOTES TABLE (see page 48) above for information on how to open the window from the Schedule Board or Customer Hub.
2. Double-click the note, or select the note and choose the *Edit Note* icon. The note displays.
3. Make any changes and choose *SAVE*.

Create a note

1. Open the Note window. (See the NOTES TABLE (see page 48) above on how to open the window from the Schedule Board or Customer Hub.)
2. Enter the **Subject**.
3. The author defaults to the current user, however you can choose a different author.
4. Select the **Reminder** indicator if the note serves as a reminder note and select the **Reminder Date**.
5. Select the **Printable?** indicator if the note can be printed.
6. Enter the note text in the box.
7. Choose *Save*.

Delete a note

1. Open the Notes window. See the NOTES TABLE (see page 48) above for information on how to open the window from the Schedule Board or Customer Hub.
2. Select the note and choose the *Delete* icon.

Working with attachments

You can view attachments that are related to a service call, a service appointment, and a job appointment. You can also add attachments that pertain to a service call, a service appointment, and/or a job appointment.

- If no attachments currently exist, choose the *View Attachments* icon.
- If there are attachments, choose the *View Attachments* icon. Then choose the *Add Attachment* icon

You can view and/or add attachments that are related to a/an:

ATTACHMENTS TABLE	Schedule Board	Customer Hub
Service/Job Appointment	• Double-click an appointment to open the appointment. • Right-click on an appointment and choose *New Appointment*.	• Select the customer and then choose the **Open Appointments** tab. Right-click on the appointment and choose *Open Appointment*.
Service Call	• Right-click on the service appointment and choose *View Service Call* to open the Service Call window.	• Select the customer and then choose the **Open Appointments** tab. Right-click on the service appointment and choose *Open Service Call*. • Select the customer and then choose the **Service Calls** tab. Right-click on the service call and choose *Open Service Call*.
Customer		• Right-click the customer and choose *Add Customer Attachment* or *View Customer Attachments*.
Location		• Right-click the customer and choose *Add Location Attachment* or *View Location Attachments.*
Equipment		• Select the customer and then choose the **Equipment** tab. Right-click on the equipment and choose *Add Attachment* or *View Attachments*.
Contracts		• Select the customer and then choose the **Contracts** tab. Right-click on the contract and choose *Add Attachment* or *View Attachments*.

View an attachment

1. Open the Attachments window. See the ATTACHMENTS TABLE (see page 50) above for information on how to open the Attachment window from the Schedule Board or Customer Hub.
2. In the Attachments window double-click the attachment to view.

Add an attachment

1. Open the Attachments window. See the ATTACHMENTS TABLE (see page 50) above for information on how to open the Attachment window from the Schedule Board or Customer Hub.
2. In the Attachments window, choose *Add New Attachment* icon. The Attachments window is displayed.
3. Enter the **Description**.
4. Edit the **Date**, if needed.
5. Choose *SELECT FILE* and In the Open window, choose the file and then choose *Open*. Or you can drag and drop the file to the window.
6. Select *UPLOAD FILE*.
7. Close the Attachments window.

Delete an attachment

1. Open the Attachments window. See the ATTACHMENTS TABLE (see page 50) above for information on how to open the Attachment window from the Schedule Board or Customer Hub.
2. Select the attachment and choose the *Delete* icon.

Working with the Job Panel

The Job Panel displays a list of the available jobs. You can quickly view high level details about the job. A context menu is available by right-clicking on a specific job that gives you the ability view more details about the job, customer, and/or location or you can open the Appointment Wizard or create a new job appointment. The context menu also provides you with the option to print a Job Schedule. You can minimize the Job Panel by clicking the arrow in the panel title bar.

Enabling the Job Panel in Settings

The Job Panel setting option is only available if you have Signature Job Cost registered.

To enable the Job panel:

1. In Schedule, click the *hamburger menu* and then select Settings.
2. Under Global Options, mark **Show Job Panel**.
3. Select *Save*.

Using the Job Panel

The Job Panel displays the following information for each job:

- Job Number
- Job Description

- Customer Name
- Location Name
- Project Manager
- Contract Type
- Job Start Date
- Job End Date

Searching for a job

Use the Search field at the top of the Job Panel to search for a specific active job.

Using the context menu

Right-click on a job in the panel to view the context menu.

The following options are available:

- **View Job Details**
  Opens the Job Details window. This displays details about the job including job number, description, project number, division, estimator, project manager, customer, job address, bill to customer, contract number, contract type, % complete, estimated hours, actual hours, user defined 1, inactive status, certified payroll status, cost codes and subcontractors.
- **New Appointment**
  Opens the New Job Appointment window with the current Job Number, Customer Name, and Location Name defaulting in the window. See Viewing/editing job appointment details (see page 27).
- **Appointment Wizard**
  Opens the Appointment Wizard with the Appointment Type defaulting to Job and Job Number defaulting to the current job. See Using the Appointment Wizard (see page 24).

  > You can also access the Appointment Wizard by double-clicking on a job in the Job Panel.

- **View Customer Details**
  Opens the Customer Hub with the focus on the current customer. See Viewing the Customer tab (see page 56).
- **View Location Details**
  Opens the Customer Hub with the focus on the current customer location. See Viewing the Location tab (see page 57).
- **Print Job Schedule**
  Displays a report that displays the schedule for the current job. See Printing the Job Schedule by Cost Code report (see page 52).

Printing the Job Schedule by Cost Code report

This report allows you to view the job information including: Job number, customer, bill to customer, project manager, project number, division, contract type, job address ID, bill to address ID, job start date, job completion date, project management percentage complete, and job status.

Also included are the job's cost code information including: the cost codes and descriptions, status, start and completion dates, estimated hours, actual hours, estimated remaining hours, scheduled appointment hours, unposted TimeTrack hours, remaining less scheduled hours. Each job's total hours are displayed beneath the job. The end-of-report footer includes hour totals for all jobs included in the report.

⚠ If the job does not have any cost codes and you attempt to run the report, an error message will display.

To print the job schedule:

1. In Schedule, right-click on a job in the Job Panel from the Schedule Board.
2. Select **Job Schedule by Cost Code Report**.
3. Complete the report header information:

- **Print Cost Code Schedule**
  - Select **Yes** to include a 6-week Gantt-style forecast schedule that displays the number of hours currently scheduled. The default is Yes.
  - Select **No** to prevent the 6-week Gantt-style forecast schedule from being displayed.
- **Schedule Start**
  Select the date the schedule starts for the report. The date defaults to today's date.
- **Divisions**
  Select drop-down arrow and then mark the divisions to include.
- **Print by**:
  - **Job Number** (default)
    Each job starts on a separate page.
  - **Division**
    Each division starts on a separate page, with multiple jobs on each page.
- **From Job/To Job**
  These fields default to the job that you right-clicked on from the Job Panel, however you can select any job from the drop-down.

- Select *View Report*.

Using the Customer Hub

The Customer Hub shows customer data including their contact information, location, service calls, location equipment, location contacts, location contracts, and/or jobs. Notes and attachments can be added and viewed for the customer, location, service calls, and location equipment.

- Accessing the Customer Hub (see page 53)
- Viewing customer information (see page 54)
- Viewing detailed customer information (see page 54)
- Creating customers, locations, and service calls (see page 55)
- Filtering, sorting, and rearranging data (see page 55)
- Buttons on this window (see page 55)

Accessing the Customer Hub

You can access the Customer Hub in one of three ways, with the last two methods having the selected customer or location highlighted on the hub page:

- Choose the *Customer Hub* icon at the top of Schedule.
- On the schedule board, right-click on the appointment and choose *View Customer Details* or *View Location Details*.

- In the **Unscheduled Appointments** section of Schedule, right-click an appointment and choose *View Customer Details* or *View Location Details*.

Viewing customer information

The Customer Hub displays the following information in the top scroll window.

> The column order listed below is the default order. You can filter, sort, and rearrange the data in this window. Filtering, sorting, and rearranging data (see page 55) for more information.

- Customer
    - Notes
    - Name
    - ID
- Location
    - Notes
    - Name
    - ID
- Address
- Address 2
- Phone
- Contact Person
- Service Area
- City
- State
- Postal Code

Viewing detailed customer information

To see detail information for a customer, select the customer from the list on the Customer Hub.

The details section contains the following tabbed information associated with the customer. Some of the tabs may or may not display for all customers.

- **Customer**
  Displays the customer's details. See Viewing the Customer tab (see page 56).
- **Location**
  Display's the customer location's details. See Viewing the Location tab (see page 57).
- **Open Appointments**
  Displays any open appointments for the customer. See Viewing the Open Appointments tab (see page 57).
- **Service Calls**
  Displays the customer location's service calls. See Viewing the Service Calls tab (see page 60).
- **Equipment**
  Displays the customer's equipment. See Viewing the Equipment tab (see page 63).
- **Contacts**
  Displays the customer's contacts. See Working with the Contacts tab (see page 65).
- **Contracts**
  Displays the customer's contracts. See Viewing the Contracts tab (see page 69).
- **Jobs**
  Displays the customer's jobs. See Viewing the Jobs tab (see page 71).

Creating customers, locations, and service calls

You have the option to right-click in the Customer Hub and create any of the following:

- **Customer**
  See Creating a new customer (see page 74).
- **Location**
  See Creating a new location (see page 74).
- **Service Call**
  See Creating a new service call (see page 74).

Filtering, sorting, and rearranging data

Use your mouse to drag or select options below:

- **Group**
  To group the display by a column, select a column header and drag this to the area labeled *Drag a column header to the group location to group the results by that column* located to the top left of the columns. To undo the grouping, drag the column header back to anywhere on the grid, the column header returns automatically to its original location.

  > This option may not be available, depending on the window you are viewing.

- **Sort order**
  Select the column header to change the sort order. A small triangle points to indicate if the sorting is ascending (A-Z) or descending (Z-A). Hold the Shift key when selecting headers to sort against multiple columns simultaneously.
- **Filter**
  Select the lookup to choose a filter type (contains, does not contain, starts with, ends with, equals, does not equal) and enter the value in the field to the right of the lookup.
- **Column Order**
  Drag the column headers to the left or right to change the column order. The Customer and Location columns each have a main column header that lets you drag all three columns (Notes, Name, ID) at the same time. You can also rearrange the Notes, Name, and ID columns beneath both the Customer and Location headers.
- **Scrolling**
  A horizontal scrollbar is hidden until you hover with your mouse at the bottom of the grid. When the horizontal scrollbar displays, you can drag the bar to view more columns. A vertical scrollbar is automatically displayed.

Buttons on this window

Button	Description
	**Find** For information on locating records in the Customer Hub using the *Find* icon, see Locating a record using Find (see page 8). This button may not be available, depending on the window you are viewing.

Button	Description
	**Delete** Select an appointment and then select to delete the appointment. ⚠ This button may not be available, depending on the window you are viewing.
	**Clear Filter** Choose to clear the current search results filters.
	**Refresh** Reloads the results from the database.
	**Export** Select to export all data or selected rows. This icon displays for the main Customer Hub list as well as some of the detail tabs (Open Appointments, Service Calls, Equipment, Contacts, Contracts, and Jobs) ⚠ This button may not be available, depending on the window you are viewing.
	**Column Tool** Use the Column Tool to select fields to display from a list of available columns. Mark to display the checkbox, unmark the checkbox to hide.

Viewing the Customer tab

You can view existing customer information. You can also create a new customer from the Customer Hub. See Creating a new customer (see page 74).

Viewing customer details

1. To view the customer details, choose a customer in the Customer Hub.
2. The customer information displays on the **Customer** tab.
3. You can view the display-only customer information:
    - Customer Number
    - Customer Name
    - Address 1
    - Address 2
    - City
    - State
    - Postal Code
    - Contact Person 1
    - Phone 1
    - Contact Person 2

- Phone 2
- Salesperson
- Hold Status
- Inactive Status
- Priority
- Receivables Status
- User_Define_1a

4. You can view and/or add customer notes and attachments. See Working with notes and attachments[16].

Viewing the Location tab

You can view a customer's location details on the Customer Hub. Locations are listed separately in the customer list. You can create a new location from the Customer Hub. See Creating a new location (see page 74).

> Editing locations must be done in Service Management.

Viewing location details

1. To view the location details, choose a customer in the Customer Hub.
2. Choose the **Location** tab.
3. The following the display-only customer location information is available:
   - Customer Number
   - Address ID
   - Location Name
   - Address 1
   - Address 2
   - Address 3
   - City
   - State
   - Postal Code
   - Contact Person 1
   - Contact Person 2
   - Phone 2
   - Salesperson
   - Hold
   - Inactive
   - Priority
   - Division
   - Affiliate
   - Region
   - Branch
   - User_Define_1a
   - User_Define_2a
   - User_Define_3a
   - User_Define_4a
   - User_Define_5a
   - User_Define_6a
4. A map displays the customer location.

   > Mapping options need to be enabled and set up in Schedule Settings. The customer location also needs to have the latitude and longitude information entered in the Location window in Signature.

5. You can view and/or add location notes and attachments. See Working with notes and attachments[17].

Viewing the Open Appointments tab

You can view the open appointments for the customer location.

- Viewing open appointments (see page 58)
- Filtering, sorting, and rearranging data (see page 58)
- Buttons on this window (see page 59)
- Available data columns (see page 60)

16 https://docs.key2act.io/display/NewTopics/Working+with+notes+and+attachments
17 https://docs.key2act.io/display/NewTopics/Working+with+notes+and+attachments

Viewing open appointments

1. To view the open appointment(s) for a customer, choose a customer in the Customer Hub.
2. In the details section of the Customer Hub, choose the **Open Appointments** tab.
3. In this tab view, you can:
    a. Double-click an appointment to open the appointment on the Schedule Board. See Viewing/editing service appointment details (see page 29) or Viewing/editing job appointment details (see page 27).
    b. Right-click a Service Call appointment and then choose from the following:
        - **Add Note** - Opens the Service Call note window. See Working with notes and attachments (see page 48).
        - **View Note** - Opens the Notes/Attachments window. See Working with notes and attachments[18]. (Displays if a note exists.)
        - **Open Service Call** - Opens the Service Call window on the Schedule tab. See Viewing/editing the service call (see page 31).
        - **Open Appointment** - Opens the Service Appointment window on the Schedule tab. See Viewing/editing service appointment details (see page 29).
        - **Unschedule Appointment** - The appointment time is set to 12:00 AM. The appointment is moved from the schedule board to the Unscheduled Appointments section. See Unscheduled or unassigned appointments[19].
        - **Unassign Appointment** - The Resource field is updated to UNASSIGNED. The appointment is moved from the schedule board to the Unscheduled Appointments section. See Unscheduled or unassigned appointments[20].
    a. Right-click a Job appointment and then choose from the following:
        - **Add Note** - Opens the Job Appointment note window. See Working with notes and attachments (see page 48).
        - **View Note** - Opens the Notes/Attachments window. See Working with notes and attachments[21]. (Displays if a note exists.)
        - **View Job Details** - Opens a display-only view of the job details with tabs for the cost codes and subcontractors.
        - **Open Appointment** - Opens the Job Appointment window. See Viewing/editing job appointment details (see page 27).
        - **Unschedule Appointment** - The appointment time is set to 12:00 AM. The appointment is moved from the schedule board to the Unscheduled Appointments section. See Unscheduled or unassigned appointments[22].
        - **Unassign Appointment** - The Resource field is updated to UNASSIGNED. The appointment is moved from the schedule board to the Unscheduled Appointments section. See Unscheduled or unassigned appointments[23].

Filtering, sorting, and rearranging data

Use your mouse to drag or select options below:

- **Group**
  To group the display by a column, select a column header and drag this to the area labeled *Drag a column header to the group location to group the results by that column* located to the top left of the columns. To undo

18 https://docs.key2act.io/display/NewTopics/Working+with+notes+and+attachments
19 https://docs.key2act.io/display/NewTopics/Unscheduled+or+unassigned+appointments
20 https://docs.key2act.io/display/NewTopics/Unscheduled+or+unassigned+appointments
21 https://docs.key2act.io/display/NewTopics/Working+with+notes+and+attachments
22 https://docs.key2act.io/display/NewTopics/Unscheduled+or+unassigned+appointments
23 https://docs.key2act.io/display/NewTopics/Unscheduled+or+unassigned+appointments

the grouping, drag the column header back to anywhere on the grid, the column header returns automatically to its original location.

> This option may not be available, depending on the window you are viewing.

- **Sort order**
  Select the column header to change the sort order. A small triangle points to indicate if the sorting is ascending (A-Z) or descending (Z-A). Hold the Shift key when selecting headers to sort against multiple columns simultaneously.
- **Filter**
  Select the lookup to choose a filter type (contains, does not contain, starts with, ends with, equals, does not equal) and enter the value in the field to the right of the lookup.
- **Column Order**
  Drag the column headers to the left or right to change the column order. The Customer and Location columns each have a main column header that lets you drag all three columns (Notes, Name, ID) at the same time. You can also rearrange the Notes, Name, and ID columns beneath both the Customer and Location headers.
- **Scrolling**
  A horizontal scrollbar is hidden until you hover with your mouse at the bottom of the grid. When the horizontal scrollbar displays, you can drag the bar to view more columns. A vertical scrollbar is automatically displayed.

Buttons on this window

Button	Description
	Find For information on locating records in the Customer Hub using the *Find* icon, see Locating a record using Find (see page 8). This button may not be available, depending on the window you are viewing.
	Delete Select an appointment and then select to delete the appointment. This button may not be available, depending on the window you are viewing.
	Clear Filter Choose to clear the current search results filters.
	Refresh Reloads the results from the database.
	Export Select to export all data or selected rows. This icon displays for the main Customer Hub list as well as some of the detail tabs (Open Appointments, Service Calls, Equipment, Contacts, Contracts, and Jobs)

Button	Description
	This button may not be available, depending on the window you are viewing.
	Column Tool Use the Column Tool to select fields to display from a list of available columns. Mark to display the checkbox, unmark the checkbox to hide.

Available data columns

The default columns that display are:

- Notes - Displays if the note is empty or if a note is attached.
- Type
- Workorder/Job
- Appointment
- Cost Code
- Start Time
- Appt Status
- Resource name
- Estimate Hours
- Actual Hours
- Job Name

You can add the following column:

- Completion Date

Viewing the Service Calls tab

Service calls can be viewed or created in the Customer Hub or they can be created in Service Management. To create a new service call from the Customer Hub, see Creating a new service call (see page 74).

- Viewing service calls (see page 60)
- Filtering, sorting, and rearranging data (see page 61)
- Buttons on this window (see page 61)
- Available data columns (see page 62)

Viewing service calls

1. To view the service call(s) for a customer location, choose a customer in the Customer Hub.
2. In the details section of the Customer Hub, choose the **Service Call** tab.
3. In this tab, you can:
   a. Double-click the service call to open the service call window in the Schedule tab. See Viewing/editing the service call (see page 31).
   b. Right-click a service call and choose from the following:

- **Add Note** - Opens the Service Call note window. See Working with notes and attachments (see page 48).
- **Add Attachment** - Opens the Service Call attachment window. See Working with notes and attachments (see page 48).
- **View Notes** - Opens the Notes/Attachments window. See Working with notes and attachments (see page 48). (Displays if a note exists.)
- **View Attachments** - Opens the Notes/Attachments window. See Working with notes and attachments (see page 48). (Displays if an attachment exists.)
- **Open Service Call** - Opens the Service Call window on the Schedule tab. See Viewing/editing the service call (see page 31).
- **New Appointment** - Opens the New Appointment window on the Schedule tab. See Creating additional appointments (see page 38).
- **Appointment Wizard** - Opens the Appointment Wizard on the Schedule tab. See Using the Appointment Wizard (see page 24).

Filtering, sorting, and rearranging data

Use your mouse to drag or select options below:

- **Group**
  To group the display by a column, select a column header and drag this to the area labeled *Drag a column header to the group location to group the results by that column* located to the top left of the columns. To undo the grouping, drag the column header back to anywhere on the grid, the column header returns automatically to its original location.

  > This option may not be available, depending on the window you are viewing.

- **Sort order**
  Select the column header to change the sort order. A small triangle points to indicate if the sorting is ascending (A-Z) or descending (Z-A). Hold the Shift key when selecting headers to sort against multiple columns simultaneously.
- **Filter**
  Select the lookup to choose a filter type (contains, does not contain, starts with, ends with, equals, does not equal) and enter the value in the field to the right of the lookup.
- **Column Order**
  Drag the column headers to the left or right to change the column order. The Customer and Location columns each have a main column header that lets you drag all three columns (Notes, Name, ID) at the same time. You can also rearrange the Notes, Name, and ID columns beneath both the Customer and Location headers.
- **Scrolling**
  A horizontal scrollbar is hidden until you hover with your mouse at the bottom of the grid. When the horizontal scrollbar displays, you can drag the bar to view more columns. A vertical scrollbar is automatically displayed.

Buttons on this window

Button	Description
	Find For information on locating records in the Customer Hub using the *Find* icon, see Locating a record using Find (see page 8).

Button	Description
	This button may not be available, depending on the window you are viewing.
	Delete Select an appointment and then select to delete the appointment. This button may not be available, depending on the window you are viewing.
	Clear Filter Choose to clear the current search results filters.
	Refresh Reloads the results from the database.
	Export Select to export all data or selected rows. This icon displays for the main Customer Hub list as well as some of the detail tabs (Open Appointments, Service Calls, Equipment, Contacts, Contracts, and Jobs) This button may not be available, depending on the window you are viewing.
	Column Tool Use the Column Tool to select fields to display from a list of available columns. Mark to display the checkbox, unmark the checkbox to hide.

Available data columns

The default columns that display are:

- Notes - Displays if the note is empty or if a note is attached.
- Attachments - Displays if no attachment exists or if a file is attached.
- Service Call
- Call Date
- Description
- Type
- Problem Type
- Primary Resource
- Status
- Priority
- Completed
- Division
- Service Area
- Caller Name
- Caller Email Address
- Caller Phone #
- Service_User_Define_1

You can add the following columns:

- Salesperson
- Resolution
- UDF 3 Label

- Contract Number
- Estimate Hours
- Affiliate
- Region
- Branch
- Original Work Order
- Job Number
- Modified Date
- Bill Customer
- Bill Location
- Modified User
- Priority UDF Label
- UDF 1 Label
- UDF 2 Label
- UDF 4 Label
- Opened Date
- Service Call Source
- Service Call Source ID 1
- Service Call Source ID 2

Viewing the Equipment tab

You can view the customer location's equipment.

- Viewing equipment (see page 63)
- Filtering, sorting, and rearranging data (see page 63)
- Buttons on this window (see page 64)
- Available data columns (see page 65)

Viewing equipment

1. To view the equipment for a customer location, choose a customer in the Customer Hub.
2. In the details section of the Customer Hub, choose the **Equipment** tab.
3. Right-click on an equipment and then choose from the following:
   - **Add Note** - Opens the Service Call note window. See Working with notes and attachments[24].
   - **Add Attachment** - Opens the Service Call attachment window. See Working with notes and attachments[25].
   - **View Note** - Opens the Notes/Attachments window. See Working with notes and attachments[26]. (Displays if a note exists.)
   - **View Attachment** - Opens the Notes/Attachments window. See Working with notes and attachments[27]. (Displays if an attachment exists.)

Filtering, sorting, and rearranging data

Use your mouse to drag or select options below:

- **Group**
  To group the display by a column, select a column header and drag this to the area labeled *Drag a column header to the group location to group the results by that column* located to the top left of the columns. To undo the grouping, drag the column header back to anywhere on the grid, the column header returns automatically to its original location.

  > This option may not be available, depending on the window you are viewing.

- **Sort order**
  Select the column header to change the sort order. A small triangle points to indicate if the sorting is ascending

24 https://docs.key2act.io/display/NewTopics/Working+with+notes+and+attachments
25 https://docs.key2act.io/display/NewTopics/Working+with+notes+and+attachments
26 https://docs.key2act.io/display/NewTopics/Working+with+notes+and+attachments
27 https://docs.key2act.io/display/NewTopics/Working+with+notes+and+attachments

(A-Z) or descending (Z-A). Hold the Shift key when selecting headers to sort against multiple columns simultaneously.

- **Filter**
  Select the lookup to choose a filter type (contains, does not contain, starts with, ends with, equals, does not equal) and enter the value in the field to the right of the lookup.
- **Column Order**
  Drag the column headers to the left or right to change the column order. The Customer and Location columns each have a main column header that lets you drag all three columns (Notes, Name, ID) at the same time. You can also rearrange the Notes, Name, and ID columns beneath both the Customer and Location headers.
- **Scrolling**
  A horizontal scrollbar is hidden until you hover with your mouse at the bottom of the grid. When the horizontal scrollbar displays, you can drag the bar to view more columns. A vertical scrollbar is automatically displayed.

Buttons on this window

Button	Description
	Find For information on locating records in the Customer Hub using the *Find* icon, see Locating a record using Find (see page 8). This button may not be available, depending on the window you are viewing.
	Delete Select an appointment and then select to delete the appointment. This button may not be available, depending on the window you are viewing.
	Clear Filter Choose to clear the current search results filters.
	Refresh Reloads the results from the database.
	Export Select to export all data or selected rows. This icon displays for the main Customer Hub list as well as some of the detail tabs (Open Appointments, Service Calls, Equipment, Contacts, Contracts, and Jobs) This button may not be available, depending on the window you are viewing.
	Column Tool Use the Column Tool to select fields to display from a list of available columns. Mark to display the checkbox, unmark the checkbox to hide.

Available data columns

The default columns that display are:

- Notes - Displays if the note is empty or if a note is attached.
- Attachments - Displays if no attachment exists or if a file is attached.
- Equipment ID
- Description
- Contract
- Equipment Type
- Manufacturer
- Model Number
- Serial Number
- Barcode
- Installed By
- Installed Date
- Warranty Exp Date
- Ext Warranty Expiration Date
- Building ID
- Building Room
- Suspended MCC
- Inactive/Retired
- User_Defined_1a

There are no additional columns available to display.

Working with the Contacts tab

If you are using Contact Management, you can view, add, edit, and/or detach the customer location contacts.

> You can turn Contact Management on by mark Use Contact Management Option in Signature Service Management under *Setup* > *Module Setup* > *Service Options*. The Contact Management is available for Signature 2016 R3 and newer.

Viewing location contacts

To view the location contacts:

1. Select a customer in the Customer Hub.
2. In the details section of the Customer Hub, select the **Contacts** tab.

Attaching a contact

You can attach an existing Master Contact to a location. If the contact isn't found in the list of Master Contacts, you can add the contact. See Adding a contact (see page 66).

To attach a contact:

1. Select a customer in the Customer Hub.
2. In the details section of the Customer Hub, select the **Contacts** tab.
3. Right-click on any contact and select *Add Contact*.
4. In the Contact Lookup window, enter the contact's name, email address or contact phone number (partial or full) and choose *Find*.
5. Choose the *Attach to Location* icon to the far right of the contact name.

   If the contact is already attached to the location, attaching the contact again will not add a duplicate contact.

Adding a contact

Adding a contact to a location also adds the contact to the Master Contract list. The contact will show up when searching the Master Contact list.

To add a location contact:

1. Select a customer in the Customer Hub.
2. In the details section of the Customer Hub, select the **Contacts** tab.
3. Right-click on any contact and select *Add Contact*.
4. In the Contact Lookup window, enter the name of the contact (partial or full) to verify the Master Contact does not currently exist. If the contact does exist as a master contact, you can attach the contact to the location. See Attaching a contact (see page 65) for more information.
5. Choose the *Add* icon to open the Contact window.
6. Complete the following fields:
   - **Name** (required)
     Enter the first and last name.
   - **Local/Agency**
     Select the contact type.
   - **Organization**
     Enter the name of the organization.
   - **Role**
     Select the contact's role.
   - **Address 1, Address 2, City, State, Postal Code**
     The address information defaults in from the Location however you can edit this as needed.
   - **Primary Phone Number**
     Enter the primary phone number.
   - **Phone Type**
     Select the phone type for the primary phone number
   - **Email, Pin Number, Customer Portal Report Folder**
     Provide the login information and application data if this contact is a Customer Portal user.
   - **Quick Note**
     Use the Quick Note window to enter notes and other information. Unlike attached notes created with the notepad button, a quick note is visible on the Contacts tab.
7. Choose *Save*.

Editing a contact

Editing a location contact will also update the contact information in the Master Contact list. The role value does not update the Master Contact as a contact's role may be different for other locations.

To edit a location contact:

1. Select a customer in the Customer Hub.
2. In the details section of the Customer Hub, select the **Contacts** tab.
3. Right-click on the contact and select *Edit Contact*.
4. The Contact window opens and you can edit any of the following fields:
    - **Name** (required)
      Enter the first and last name.
    - **Local/Agency**
      Select the contact type.
    - **Organization**
      Enter the name of the organization.
    - **Role**
      Select the contact's role.
    - **Address 1, Address 2, City, State, Postal Code**
      The address information defaults in from the Location however you can edit this as needed.
    - **Primary Phone Number**
      The Phone Type cannot be changed on the existing Primary Phone Number. You can either edit or add a new number and then set the Type:
        i. You can edit the Primary Phone Number by clicking on the *Phone* icon. Edit the phone number and choose *Save*.
        ii. You can add additional phone numbers by clicking on the *Phone* icon. In the Contact Phone Numbers window, choose the Add icon. Enter the new phone number and select the Type. If the new number will be the Primary, you need to clear the existing Primary checkbox and then mark the new number as the Primary. Choose *Save*.
        iii. You can delete a phone number by clicking on the *Delete* icon. Choose *Save*. You can select the *Undo* icon directly above the Delete icon column to restore deleted phone numbers.

        > You cannot delete a phone number if it is marked as the Primary Phone Number. You will need to clear the Primary checkbox and mark a different phone number as the Primary before you can delete the phone number.

    - **Email, Pin Number, Customer Portal Report Folder**
      Provide the login information and application data if this contact is a Customer Portal user.
    - **Quick Note**
      Use the Quick Note window to enter notes and other information. Unlike attached notes created with the notepad button, a quick note is visible on the Contacts tab.
5. Choose *Save*.

> Prior to saving, you have the option to undo changes by selecting the *Undo* icon that displays to the right of the *Save* button.

Detaching a contact

When you detach a contact from a location, the contact remains in the Master Contacts list but removes the contact from the location.

To detach a location contact:

1. Select a customer in the Customer Hub.
2. In the details section of the Customer Hub, select the **Contacts** tab.
3. Right-click on the contact and select *Detach Contact*.
4. A verification message displays prompting you to verify that you want to detach the contact.

Filtering, sorting, and rearranging data

Use your mouse to drag or select options below:

- **Group**
  To group the display by a column, select a column header and drag this to the area labeled *Drag a column header to the group location to group the results by that column* located to the top left of the columns. To undo the grouping, drag the column header back to anywhere on the grid, the column header returns automatically to its original location.

  > This option may not be available, depending on the window you are viewing.

- **Sort order**
  Select the column header to change the sort order. A small triangle points to indicate if the sorting is ascending (A-Z) or descending (Z-A). Hold the Shift key when selecting headers to sort against multiple columns simultaneously.
- **Filter**
  Select the lookup to choose a filter type (contains, does not contain, starts with, ends with, equals, does not equal) and enter the value in the field to the right of the lookup.
- **Column Order**
  Drag the column headers to the left or right to change the column order. The Customer and Location columns each have a main column header that lets you drag all three columns (Notes, Name, ID) at the same time. You can also rearrange the Notes, Name, and ID columns beneath both the Customer and Location headers.
- **Scrolling**
  A horizontal scrollbar is hidden until you hover with your mouse at the bottom of the grid. When the horizontal scrollbar displays, you can drag the bar to view more columns. A vertical scrollbar is automatically displayed.

Buttons on this window

Button	Description
	Find For information on locating records in the Customer Hub using the *Find* icon, see Locating a record using Find (see page 8). This button may not be available, depending on the window you are viewing.
	Delete Select an appointment and then select to delete the appointment. This button may not be available, depending on the window you are viewing.

Button	Description
	**Clear Filter** Choose to clear the current search results filters.
	**Refresh** Reloads the results from the database.
	**Export** Select to export all data or selected rows. This icon displays for the main Customer Hub list as well as some of the detail tabs (Open Appointments, Service Calls, Equipment, Contacts, Contracts, and Jobs) This button may not be available, depending on the window you are viewing.
	**Column Tool** Use the Column Tool to select fields to display from a list of available columns. Mark to display the checkbox, unmark the checkbox to hide.

Available data columns

The default columns that display are:

- Contact Name
- Local/Agency
- Role Type
- Phone Number
- Organization
- Quick Note
- User_Define_5
- Email Address

There are no additional columns to display.

Viewing the Contracts tab

You can view the customer location contracts.

Viewing contracts

1. To view the location contracts, choose a customer in the Customer Hub.
2. In the details section of the Customer Hub, choose the **Contracts** tab.
3. Right-click a contract and choose from the following:

- **Add Note** - Opens the Service Management note window. See Working with notes and attachments[28].
- **Add Attachment** - Opens the Service Call attachment window. See Working with notes and attachments[29].
- **View Note** - Opens the Notes/Attachments window. See Working with notes and attachments[30]. (Displays if a note exists.)
- **View Attachment** - Opens the Notes/Attachments window. See Working with notes and attachments[31]. (Displays if an attachment exists.)

Filtering, sorting, and rearranging data

Use your mouse to drag or select options below:

- **Group**
  To group the display by a column, select a column header and drag this to the area labeled *Drag a column header to the group location to group the results by that column* located to the top left of the columns. To undo the grouping, drag the column header back to anywhere on the grid, the column header returns automatically to its original location.

  > This option may not be available, depending on the window you are viewing.

- **Sort order**
  Select the column header to change the sort order. A small triangle points to indicate if the sorting is ascending (A-Z) or descending (Z-A). Hold the Shift key when selecting headers to sort against multiple columns simultaneously.
- **Filter**
  Select the lookup to choose a filter type (contains, does not contain, starts with, ends with, equals, does not equal) and enter the value in the field to the right of the lookup.
- **Column Order**
  Drag the column headers to the left or right to change the column order. The Customer and Location columns each have a main column header that lets you drag all three columns (Notes, Name, ID) at the same time. You can also rearrange the Notes, Name, and ID columns beneath both the Customer and Location headers.
- **Scrolling**
  A horizontal scrollbar is hidden until you hover with your mouse at the bottom of the grid. When the horizontal scrollbar displays, you can drag the bar to view more columns. A vertical scrollbar is automatically displayed.

Buttons on this window

Button	Description
	Find For information on locating records in the Customer Hub using the *Find* icon, see Locating a record using Find (see page 8). This button may not be available, depending on the window you are viewing.

28 https://docs.key2act.io/display/NewTopics/Working+with+notes+and+attachments
29 https://docs.key2act.io/display/NewTopics/Working+with+notes+and+attachments
30 https://docs.key2act.io/display/NewTopics/Working+with+notes+and+attachments
31 https://docs.key2act.io/display/NewTopics/Working+with+notes+and+attachments

Button	Description
	Delete Select an appointment and then select to delete the appointment. This button may not be available, depending on the window you are viewing.
	Clear Filter Choose to clear the current search results filters.
	Refresh Reloads the results from the database.
	Export Select to export all data or selected rows. This icon displays for the main Customer Hub list as well as some of the detail tabs (Open Appointments, Service Calls, Equipment, Contacts, Contracts, and Jobs) This button may not be available, depending on the window you are viewing.
	Column Tool Use the Column Tool to select fields to display from a list of available columns. Mark to display the checkbox, unmark the checkbox to hide.

Available data columns

The default columns that display are:

- Notes - Displays if the note is empty or if a note is attached.
- Attachments - Displays if no attachment exists or if a file is attached.
- Contract Number
- Sequence
- Type
- Start Date
- End Date
- Division
- PO Number
- Salesperson
- Primary Tech
- Hold
- Bill to Customer
- Bill to Location
- Master Contract

There are no additional columns to display.

Viewing the Jobs tab

Jobs can be viewed in the Customer Hub.

Viewing jobs

1. To view the job(s) for a customer location, choose a customer in the Customer Hub.
2. In the details section of the Customer Hub, choose the **Jobs** tab.
3. Right-click a job and choose **View Job Details** to open a display-only view of the job details with tabs for the cost codes and subcontractors.

Filtering, sorting, and rearranging data

Use your mouse to drag or select options below:

- **Group**
  To group the display by a column, select a column header and drag this to the area labeled *Drag a column header to the group location to group the results by that column* located to the top left of the columns. To undo the grouping, drag the column header back to anywhere on the grid, the column header returns automatically to its original location.

  > This option may not be available, depending on the window you are viewing.

- **Sort order**
  Select the column header to change the sort order. A small triangle points to indicate if the sorting is ascending (A-Z) or descending (Z-A). Hold the Shift key when selecting headers to sort against multiple columns simultaneously.
- **Filter**
  Select the lookup to choose a filter type (contains, does not contain, starts with, ends with, equals, does not equal) and enter the value in the field to the right of the lookup.
- **Column Order**
  Drag the column headers to the left or right to change the column order. The Customer and Location columns each have a main column header that lets you drag all three columns (Notes, Name, ID) at the same time. You can also rearrange the Notes, Name, and ID columns beneath both the Customer and Location headers.
- **Scrolling**
  A horizontal scrollbar is hidden until you hover with your mouse at the bottom of the grid. When the horizontal scrollbar displays, you can drag the bar to view more columns. A vertical scrollbar is automatically displayed.

Buttons on this window

Button	Description
	Find For information on locating records in the Customer Hub using the *Find* icon, see Locating a record using Find (see page 8).

Button	Description
	This button may not be available, depending on the window you are viewing.
	Delete Select an appointment and then select to delete the appointment. This button may not be available, depending on the window you are viewing.
	Clear Filter Choose to clear the current search results filters.
	Refresh Reloads the results from the database.
	Export Select to export all data or selected rows. This icon displays for the main Customer Hub list as well as some of the detail tabs (Open Appointments, Service Calls, Equipment, Contacts, Contracts, and Jobs) This button may not be available, depending on the window you are viewing.
	Column Tool Use the Column Tool to select fields to display from a list of available columns. Mark to display the checkbox, unmark the checkbox to hide.

Available data columns

The default columns that display are:

- Job
- Description
- Project
- Division
- Project Manager
- Estimator
- Contract Number
- Contract Type
- Scheduled Start
- Scheduled End
- Estimated Hours
- Hours to Date
- Percent Complete
- User_Define_1

You can add the following columns:

- Bill to Customer
- Inactive
- Certified Payroll
- Billing Type
- Modified Date

- Modified User

Creating a new customer

You can create a new customer in the Customer Hub. This information is added to Service Management.

1. In the Customer Hub window, right-click on anywhere in the customer list.
2. Choose **Create New Customer**.
3. In the New Customer/Location window, enter the customer details, required fields are indicated with a red *** asterisk.
4. Choose *Save*.

Creating a new service call

You can initiate a new service call for a customer from the Customer Hub. This opens the New Service Call window on the Schedule tab.

1. To create a new service call from the Customer Hub, right-click on the customer from the list.
2. Choose **Create New Service Call for <customer name - location>**.
3. Choose the Schedule tab to see the New Service Call window.
4. The following fields are not editable:
    - Service Call - The service call ID is generated when the service call is saved.
    - Customer Number
    - Customer Name
    - Address ID
    - Location Name
    - Bill Customer Number
    - Bill Address Code
5. Complete the following fields, only Division is required:
    - Division
    - Description
    - Service Call Status
    - Resource - The assigned technician displays but you can choose another technician.
    - Start Date
    - Estimated Hours
    - Completion Date
    - Equipment - Choose from equipment available to the customer/location.
6. Choose *Save*.

Creating a new location

You can create a new location for a customer in the Customer Hub window. This information is synced to Service Management.

1. In the Customer Hub window, right-click on the customer. You can use the advanced lookup features to filter and locate customers quickly and more easily by filtering on inactive or bill-only locations, and by rearranging the columns in the lookup window to suit your preferences. If you have global filtering turned on, you will only see those customers in your area.
2. Choose **Create New Location for xxx**.
3. In the New Customer/Location window, enter the location details, required fields are indicated with a red *** asterisk.

4. Choose *Save*.

Using the Map View

Use the Map View to view scheduled and unscheduled job/service call appointments. Before you can use Map View, you need to set up Mapping. See Map View setup (see page 19) for more information.

> If you are receiving an error message when using the Google Maps API with MapView, see Google Maps Error Messages (see page 79) for additional Status information.

Viewing appointments on map

Access the Map and Route Resources window

1. To open the Map and Route Resources window, choose the *Map View* icon.
2. The Map and Route Resources window opens and displays icons for on the map for all job and service appointments, scheduled and unscheduled, as well as unassigned appointments.
3. The icons that display for the job/service appointments as well as unassigned and unscheduled appointments depend on the mapping options (see page 19) in Configuration settings.
   The default icons are:
   - - Resource
   - - Scheduled appointment
   - - Unscheduled appointment
   - - Unassigned appointment
4. To view the traffic situation, mark *Show Traffic*.

See also:

- Viewing appointment details (see page 75)
- Viewing and optimizing routes (see page 76)
- Viewing unscheduled/unassigned appointments on the map (see page 76)
- Using drawing tools on the map (see page 77)

Viewing appointment details

You can view a pop-up window that displays the appointment details.

1. In the Map View, click on a job or service appointment.
2. Choose *Open Appointment*.

See also:

- Viewing appointments on map (see page 75)

- Viewing and optimizing routes (see page 76)
- Viewing unscheduled/unassigned appointments on the map (see page 76)
- Using drawing tools on the map (see page 77)

Viewing and optimizing routes

You can view a resource route on the map based on their assigned schedule.

> If rearranging a resource's route causes the appointment to be outside of the resource's shift, that appointment will display as red in the resource appointment list.

1. In the Map and Route Resources window, choose the resource by clicking the *Select Resource for Routing* drop-down and selecting the technician.
2. If this is the start of the day, the start location that was set up in Admin Settings for the resource will be the first location listed.
3. The appointments are listed in the order that they display on the schedule board.

   > See Using drawing tools on the map (see page 77) to learn how to draw a shape on the map to include those appointments in the technician's route.

4. In this window, you have the option to:
   - Manually re-arranging the route items by dragging and dropping in the list.
   - - Add the start address as the end location.
   - - Add a lunch break and time in minutes.
   - - Remove selected item.
   - Process Route
     - - Route Current List - Choose this option to route the list as it is currently displayed. This can be with a lunch break and/or the end location added.
     - - Optimize Current List - Choose this option to have the system re-arrange the appointments to optimize the route based on resource and appointment locations.
   - - Saves the route as displayed and rearranges the appointments on the schedule board for the resource.
   - - Closes the resource routing window. If you choose to not save any changes, nothing will change for the resource schedule.

See also:

- Viewing appointments on map (see page 75)
- Viewing appointment details (see page 75)
- Viewing unscheduled/unassigned appointments on the map (see page 76)
- Using drawing tools on the map (see page 77)

Viewing unscheduled/unassigned appointments on the map

In Schedule, you can view an unscheduled or unassigned appointment quickly on the map by either right-clicking on the specific appointment or by choosing the *Map View* button on the horizontal navigation bar at the top of the Schedule window.

When you open the Map and Route Resources window, all appointments assigned for the current date are displayed, regardless of the view displayed on the Schedule Board. All unassigned appointments currently available in the unscheduled appointments grid on the Schedule Board are also displayed, with the map centered on the unassigned and unscheduled appointments.

After you select a resource to route, their unscheduled appointments will be added to the map view.

1. In Schedule, to open the Map and Route Resources window:
    - In the Unscheduled section, right-click on an unscheduled or unassigned appointment. Choose *View on Map*.

      > *View on Map* is always available for appointments where the technician ID is currently set to UNASSIGNED and for unscheduled appointments, where the technician ID is assigned, as long as the map is currently open and filtered for routing that same technician ID. Unscheduled appointments are only displayed when the map is filtered to a single technician.

    - Select *Map View* in the horizontal navigation bar at the top of the Schedule window.
2. The Map and Route Resources window opens with the pop-up window with the appointment details displayed over the icon.

See also:

- Viewing appointments on map (see page 75)
- Viewing appointment details (see page 75)
- Viewing and optimizing routes (see page 76)
- Using drawing tools on the map (see page 77)

Using drawing tools on the map

Both Google Maps and Bing Maps have drawing tools that you can use to define an area for a technician.

Using Google Maps

1. Choose the resource by clicking the *Select Resource for Routing* drop-down and selecting the technician.
2. Choose the Google Maps drawing tool that you'd like to use. You can choose between a circle, a polygon, or a square  . The hand icon  may be used to close the polygon shape, although you can also complete the polygon shape by clicking on the starting point.
3. Click the starting point on the map.
    - Circle - The starting point is the center of the circle. Click again on the map to define the outer edge.
    - Polygon - You can click more than one time on the map to draw your shape. Double-click on the final point of the shape.
    - Square - The starting point is the top left corner or the bottom right corner, depending on the direction that you move your mouse. Click on the map a second time to determine the outer edge of the shape.
4. After defining the shape with the final mouse click, you are prompted to add the unscheduled appointments to the technician's route. Appointments that are already scheduled are not added to the list.

5. You can edit the technician's route by dragging the appointments or by using the icons at the top of the route list. See Viewing and optimizing routes (see page 76).

Using Bing Maps

1. Choose the resource by clicking the *Select Resource for Routing* drop-down and selecting the technician.
2. Use the Bing Maps polygon drawing tool located at the top left of the Map View to draw a shape on the map.
3. Click the drawing tool and then click once on the map to set the first point on your shape.
4. You now have a line that will follow your mouse on the map.
5. Click on the map again to set another point.
6. Repeat step 3 to add as many points as you'd like.
7. After clicking the final point, press the ESC key on your keyboard to be prompted to add the unscheduled appointments to the technician's route. Appointments that are already scheduled are not added to the list.

   > If you are using Firefox, you may need to click in the shape and then press the ESC key on your keyboard.

8. You can edit the technician's route by dragging the appointments or by using the icons at the top of the route list. See Viewing and optimizing routes (see page 76).

Editing a shape

The shape that you've created can be edited by clicking and dragging the circles (or handles) that display on each corner and mid-line of the shape. Press the Escape key on your keyboard to select the appointments.

See also:

- Viewing appointments on map (see page 75)
- Viewing appointment details (see page 75)
- Viewing and optimizing routes (see page 76)
- Viewing unscheduled/unassigned appointments on the map (see page 76)

Troubleshooting

Topics within this section:

Clearing the Application Cache

Clearing the Application Cache will clear out all the data in the LocalStorage that we use to pass data between the Schedule and Customer Hub tabs. After they are cleared, we reset the selected resources, reload the service options and the time zones.

To clear the Application Cache:

1. In Schedule, choose the **Hamburger menu** .
2. Choose *About*.
3. Choose *Clear Application Cache*.

Clearing the Customer Hub Cache

If you find that the Customer Hub does not open when you select the Customer Hub button from the Schedule Board, you may need to clear the Customer Hub cache. Clearing the cache on your machine will allow it to open again.To clear the Customer Hub cache:

1. In Schedule, choose the **Hamburger menu** .
2. Choose *About*.
3. Choose *Clear Customer Hub Cache*.

Geocode was not successful for <service call>

If you receive an error message on the Map and Route Resources window that displays "Geocode was not successful for: <service call ID>", this means that the latitude and/or longitude information is not entered for the associated appointment address for the service call. You will need to run the **Get Latitude and Longitude for Service Locations** process found in Administration under the Process Requests tab to update your locations with valid latitude/longitude. This process only updates those records where the values are zero, existing latitude and longitude information will not be overwritten.

Google Maps Error Messages

If you are receiving an error message in Map View and you are using the Google Maps API, these are all the possible status codes that can be returned. The **Status** field within the Geocoding response object contains the status of the request, and may contain debugging information to help you track down why geocoding is not working.

The **Status** field may contain the following values:

- **OK** indicates that no errors occurred; the address was successfully parsed and at least one geocode was returned.
- **ZERO_RESULTS** indicates that the geocode was successful but returned no results. This may occur if the geocoder was passed a non-existent address.
- **OVER_DAILY_LIMIT** indicates any of the following:
  - The API key is missing or invalid.
  - Billing has not been enabled on your account.
  - A self-imposed usage cap has been exceeded.
  - The provided method of payment is no longer valid (for example, a credit card has expired).

See the Google Maps FAQ (external link)[32] to learn how to fix this.

- **OVER_QUERY_LIMIT** indicates that you are over your quota.
- **REQUEST_DENIED** indicates that your request was denied.
- **INVALID_REQUEST** generally indicates that the query (address, components or latlng) is missing.
- **UNKNOWN_ERROR** indicates that the request could not be processed due to a server error. The request may succeed if you try again.

Refreshing Tooltip Content

Refreshing the Tooltip Content will re-read the configuration file for the event content and the tool tip content from the file. If an administrator makes changes to one of these files and you do not see the changes, you can reload the tooltip content. After refreshing the page, it should have the new configuration.

To refresh the tooltip content:

1. In Schedule, choose the *Menu* icon .
2. Choose *About*.
3. Select *Refresh Tooltip Content*.

Resetting the Grid

Use the Reset Grid option to reset the selected grid back to default. Any changes that you may have made to the grid will be removed and the original configuration will be displayed. Any columns that have been moved by dragging will be reset. This will *only* affect the workstation and current browser.

To reset a grid:

1. In Schedule, choose the *Menu* icon .
2. Choose *About*.
3. Next to **Reset Grid**, choose the grid name from the drop-down list.
4. Select *Reset*.

Resource has an invalid current location

If a resource doesn't have all components set up for using Mapping, you will receive a message that states "Resource <first name> has an invalid current location. Make sure resource setup is complete in Setting up resource options[33] and then run process **Process Resource Home Locations**.

- Verify that you have the resource options set up for your resource in *Schedule Administration* > *Resource Options.*
- Verify that Vehicle Setup has been completed for each technician in Signature Service Management. *Microsoft Dynamics GP* > *Tools* > *Setup* > *Service Management* > *Lookup Setup* > *Technicians* > *Vehicles*
- If the above options have been set up correctly and you are still seeing the error message, in Schedule go to *Administration* > *Process Requests* and choose *Get Latitude/Longitude*.

For more information see Map View setup[34].

32 https://developers.google.com/maps/faq#over-limit-key-error
33 https://docs.key2act.io/display/SCHEDULE3/Setting+up+resource+options
34 https://docs.key2act.io/display/SCHEDULE3/Map+View+setup

Schedule board isn't updating

Refresh the Schedule Board

You may need to select the *Refresh* icon to display updates to the schedule board.