SCHEDULE

User Guide

Exported: 11/17/2023

Version 3.0

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

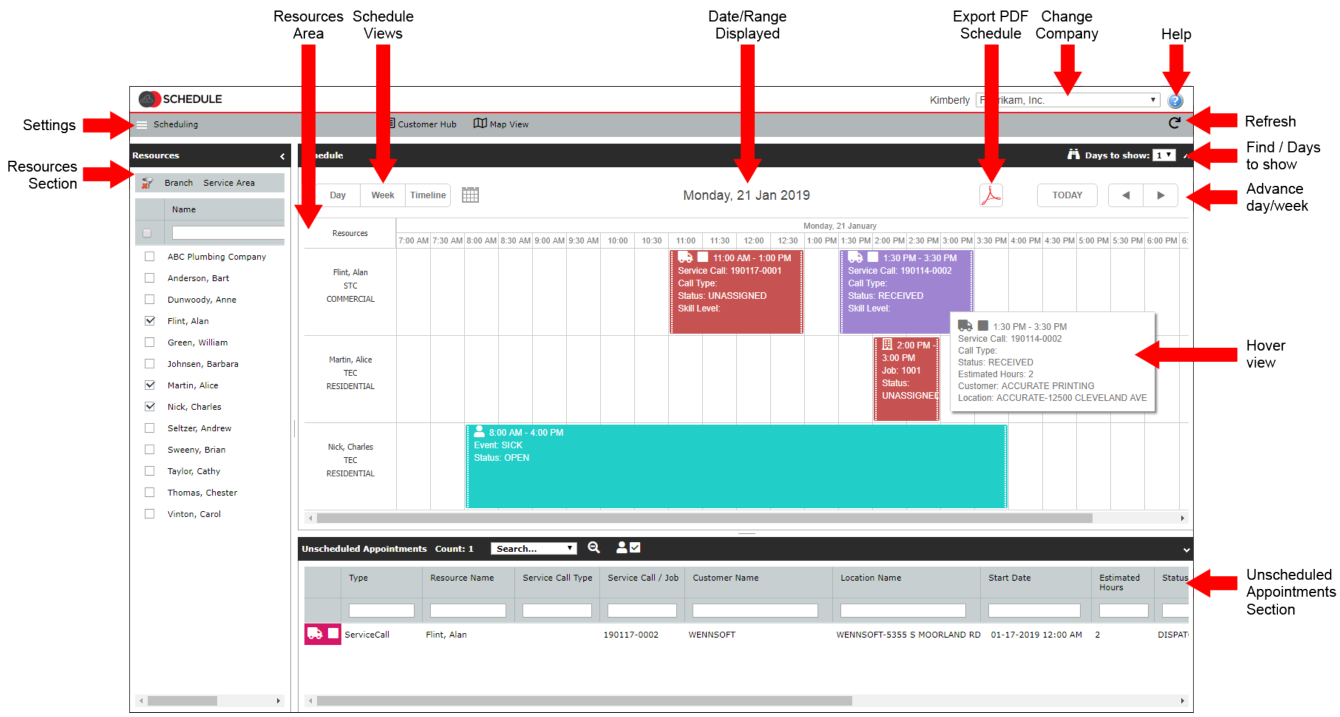
See also:

- Viewing the schedule board (see page 1)
- Appointments and appointment types (see page 2)
- Context-sensitive menus (see page 3)
- Icons and buttons (see page 4)
- Filtering and sorting in Schedule (see page 6)
- Locating a record using Find (see page 7)

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.

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. • From the Appointment Wizard in Schedule.

Appointment type	Where it is created
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

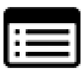
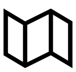
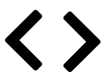
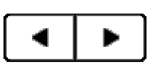
The Schedule Board and Customer Hub allows you to right-click on job/service appointments, resource activities, and resources, to access menus with common tasks that you may need to do. If you do not have access to an appointment type, you will not see this information.

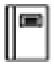
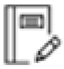
Action	Appointment Type
Set Status: Set or update the appointment or activity status.	• Job appointment • Service appointment • Resource activity
Unschedule Appointment: The appointment time is set to 12:00 AM. The appointment is moved from the schedule board to the Unscheduled Appointments section.	• 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
Appointment Wizard : Opens the appointment wizard.	• Job appointment • Service appointment • Resource activity • Resource

Action	Appointment Type
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 New 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
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.

Icon or button	Description
	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.
	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.

Icon or button	Description
	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 (see page 6)
- Filtering and sorting data (see page 6)
- Buttons on this window (see page 6)
- Filtering and sorting the unscheduled/unassigned appointments (see page 7)

Filtering and sorting on the Customer Hub

Filtering and sorting data

- **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.
- **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.
- **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 7).

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)
	Column Tool - Select to display a list of available columns to display/hide. Mark to display the checkbox, unmark 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.
      - **Customer Phone Number** - Search for location contacts using a full or partial phone 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 (see page 12).)

   > 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 9) 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 and sorting data

- **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.
- **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.
- **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 7).
	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)
	Column Tool - Select to display a list of available columns to display/hide. Mark to display the checkbox, unmark 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.

Setting up Schedule

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

In Schedule, access **Settings** or **Administration** by selecting the hamburger menu ☰ icon in the top left corner.

- Administration setup (see page 9)
- General setup (see page 12)
- Map View setup (see page 15)
- Report setup (see page 17)
- Email notification setup (see page 18)
- Setting up the ServiceChannel integration (see page 18)

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.

1. In Schedule, select the hamburger menu ☰ icon in the top left corner.
2. Choose Administration from the navigation pane.
3. Complete the following setup options:
   - Processing requests (see page 9)
   - Setting up users (see page 10)
   - Working with roles (see page 10)
4. If you will be using Mapping, you will also want to review Map View setup (see page 15).

Processing requests

1. In Schedule, select the hamburger menu ☰ icon in the top left corner.
2. Choose **Administration** from the navigation pane.
3. Choose the **Process Requests** tab and complete the following, as necessary:

- **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 16) 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.

IMPORTANT

Before setting up users in Schedule, verify that the user has an SMS User Profile in Service Management. For more information, see *Setting Up Security* in the Signature Service Management User Guide.

To set up users:

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 *Menu* ☰ button 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 23) 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 *Menu* ≡ button 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 *Menu* ≡ button 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 *Menu* ≡ button 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.

1. In Schedule, select the hamburger menu icon in the top left corner.
2. Choose **Settings** from the navigation pane.
3. The Settings page is broken out into two vertical sections, Company Options (settings here are only for the current company) and Global Options (these settings apply to all companies):
    - Setting up company options (see page 12)
    - Setting up global options (see page 15)

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 15), 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 12)
- Setting up schedule colors (see page 13)
    - Setting up custom colors (see page 13)
- Setting up fields to display (see page 14)

Setting up schedule configuration

1. In Schedule, choose the hamburger menu icon and then choose **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.
    - **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.

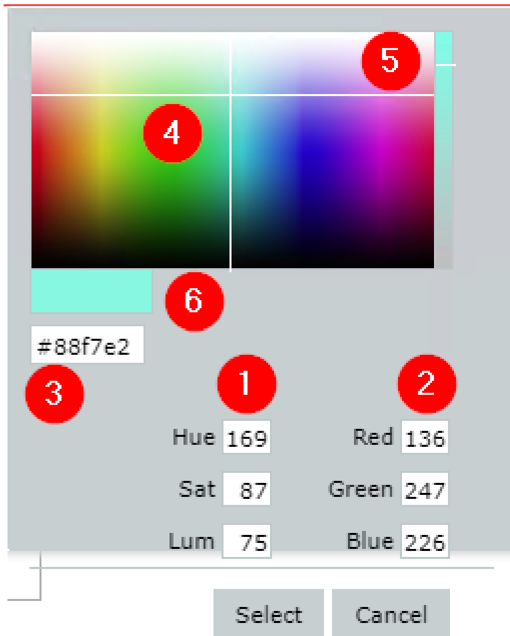
  - **Mapping Options**: See Map View setup (see page 15).
3. Choose *Save*.

Setting up schedule colors

1. In Schedule, choose the *Menu* ☰ icon 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*.

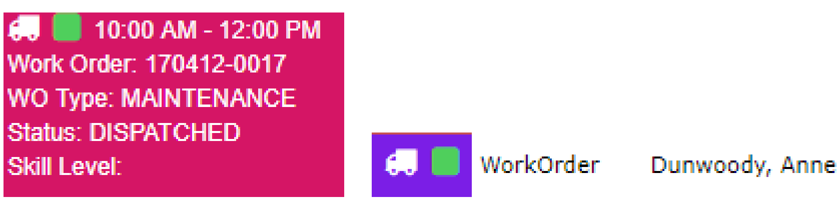
Setting up custom colors

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 *Menu* ☰ icon 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.

1. In Schedule, select the hamburger menu ≡ icon in the top left corner.
2. Choose **Settings** from the navigation pane.
3. Complete the following:
    - **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
    - **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.
4. Choose *Save*.

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.

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. Vehicle Setup is completed in Signature.

The following steps be completed to use the mapping feature:

- Setting up mapping options (see page 15)
- Setting up resource options (see page 16)
- Setting up vehicles (see page 17)

Setting up mapping options

1. In Schedule, choose the hamburger menu icon and then choose **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 9) 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 9) 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 51) or Creating a new location (see page 52).
- **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 icon in the top left corner.
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 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.
    - **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

- Copy to local SSRS location (see page 17)
- Deploying the Report (see page 17)
- Set location path (see page 18)

Copy to local SSRS location

1. Go to Schedule's installation location and then *Schedule* > *WebsiteResourceFiles* > *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*

Deploying 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. Run the following SQL statement to display the Resource Report: UPDATE WSRepts SET ReportLocation = 'Report URL' WHERE ReportReference = 'Schedule_Resource_Report_1'
3. Enter the **ReportLocation**.
4. Move the focus off the ReportLocation and then close the SQL Server.

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[2], 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

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.

Setting up the ServiceChannel integration

This section provides information on setting up the integrations from the ServiceChannel to ESMS and ESMS to Schedule.

> If you do not see the ESMS integration area in Schedule settings, please contact our operations team to request a new product registration key.

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

Setting up the ServiceChannel Integration in ESMS

Setting up the Integration

1. Log into ESMS.
2. In Admin, choose the *Integrations* icon from the navigation pane.
3. Choose *MANAGE* to the right of the application to be integrated.
4. Choose CONFIGURE INTEGRATION.
5. Complete the field(s).

   The Integration Name is primarily for your use. Only the Client ID, Secret, and/or Keys are unique identifiers specific for your organization.

6. Choose *CONFIGURE*.
   The app drawer located at the top left updates to include the newly-integrated applications.

Obtaining the ServiceChannel Client ID and Secret

Unable to render include or excerpt-include. Could not retrieve page.

Setting up ESMS Integration in Schedule

ESMS integration setup options

In Schedule, the ServiceChannel integration setup options are enabled if the service aggregator feature has been registered.

1. In Schedule, choose the *Menu* icon and then choose *General Settings*.
2. In ESMS Integrations under Company Options in Schedule Configuration, complete the following fields, as needed:
   - **ClientID/Client Secret**: This information is provided to you from WennSoft upon request.
   - **Polling Frequency:** This defaults to 15 minutes.
   - **Open Auto Process Window**: Set to **On** to have the Edit Service Call window automatically open when the dispatcher accepts a service request. This window opens on the Schedule tab.
   - **Callback URL**: This unique URL will need to be provided to WennSoft when setting up your integration.
3. Choose *Authenticate* to verify that your ClientID and Client Secret are correct.

   Pop-up blockers will need to be disabled to authenticate your ClientID and Client Secret.

4. Choose *Save*.

Adding user role service request permissions

Only users with the permission to view service requests will be able to see the Service Request tab accessed from the Customer Hub.

1. In Schedule, choose the *Menu* ☰ button in the top left corner next to Scheduling.
2. Choose **Administration**.
3. Choose the **User Roles** tab.
4. Choose the **User Role**.
5. In the Role Permissions section, mark or unmark the Service Request permissions of *View*, *Edit*, and/or *Delete*.
6. Choose *Save*.

Designating dispatcher notification email addresses in Signature Agent

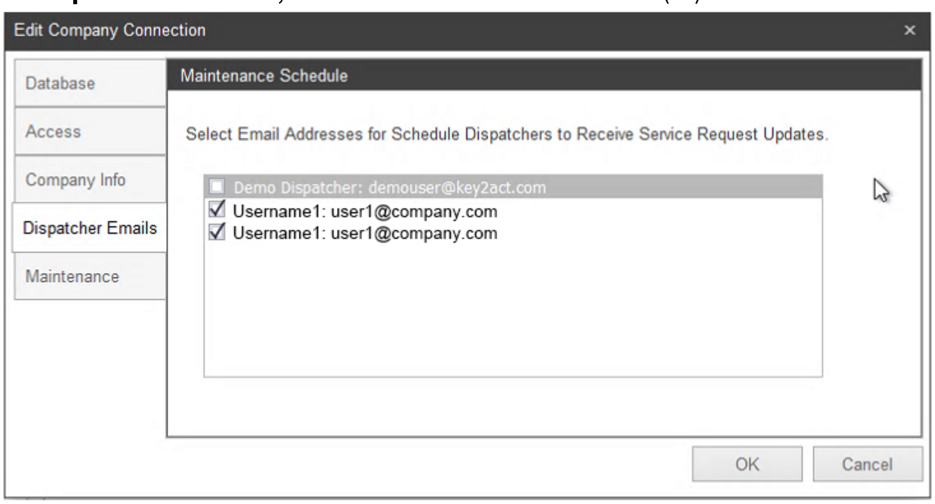
When working with service requests that are generated from ServiceChannel, there may be instances that the service request is updated on the ServiceChannel side that also updates the service request. The notifications are emailed to the Dispatcher Email Address(es) that were marked in Signature Agent.

In Schedule, there are two occasions when emails will be sent to the dispatcher email group:

- Change notification: If the scheduled date, scheduled time, priority, and/or NTE amount has changed.
- Cancellation notification: The service request was cancelled.

To designate the email address(es) to receive the notifications:

1. In Signature Agent, on the Home tab, choose the company.
2. Choose *Properties*.
3. On the **Dispatcher Email** tab, mark the email address checkbox(es) that the notifications will be sent to.



4. Choose *OK*.

Example of Change Communication Notification

The change communication is sent if the Scheduled Date, Scheduled Time, Priority, and/or NTE amount has changed on the service request. The email lists all three original and current values, regardless of what value may have changed.

Subject: An important service request value has changed

The priority, scheduled date and/or NTE value on the service request used to generate Service Call ID: 181026-0001 for Customer: DACER and Location: NYC has changed.

	Previous Value	Current Value
Scheduled Date	10/26/2018	10/26/2018
Priority	Sev 3	Sev 3
NTE	5000	10

Please review and update the service call and any associated service appointments or service call quotes for the necessary changes.

Example of Cancellation Change Communication

If a service request is cancelled through the service aggregator, the service request will no longer display in the Service Request window. The dispatcher distribution group will receive the following notification. If a service call has been created, this will need to be manually updated in Signature.

Subject: An important service request value has changed

Attention: An accepted service request has been cancelled. The associated appointment for Service Call ID: 181026-0004 for Customer: DACER and Location: NYC has been updated and the status has been changed to cancelled. Please review the service call for additional necessary actions to close the call.

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[3].
- Manually, when you choose the *Refresh Appointments* icon.

> To access Schedule's full capability, we recommend Google Chrome[4] 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.

Topics within this section:

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

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 Create additional appointments (see page 27) 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 29) 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.

Change 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

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.

- Context-sensitive options for service appointments on the Schedule Board (see page 24)
- Context-sensitive options for job appointments on the Schedule Board (see page 24)

- Making appointment changes on the schedule board (see page 25)
- View or edit service appointment details (see page 25)
- View or edit job appointment details (see page 26)
- View or edit the service call (see page 27)
- Create additional appointments (see page 27)
- Completing appointments (see page 28)
- Unscheduled or unassigned appointments (see page 28)
- Using the appointment wizard (see page 29)
- Notifying customers via email (see page 30)

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 28).
    - Dispatched
    - In Route
    - Open
    - Paged
    - Re-assigned
    - 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 28).
- **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 28).
- **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 30).
- **Quick Print** - Opens the Work Order SRS report with the service call details displayed.
- **Print Service Call** - Prints the service call information.
- **Appointment Wizard** - Opens the appointment wizard. See Using the appointment wizard (see page 29).
- **Create New Appointment** - Opens the New Appointment/Activity window to create a new appointment based on the current appointment. See Create additional appointments (see page 27).
- **Add New Appointment Note** - Adds a note to the appointment. See Working with notes (see page 35).
- **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 37).
- **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 37).

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 28).
    - Dispatched
    - In Route
    - Open
    - Paged
    - Re-assigned
    - 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 28).
- **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 28).
- **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 (see page 29) 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 (see page 27).
- **Add New Appointment Note** - Adds a note to the appointment. See Working with notes (see page 35).
- **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 37) 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 (see page 37) for more information.

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

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.

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.

View or edit 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 information the appointment information. Additional fields may display depending on Schedule settings.
   - Customer Name
   - Location Name
   - Service Call - Display only

- Appointment - Display only
- Description
- Status
- Resource
- Start Date
- Estimated Hours
- Skill Level
- Priority
- Completion Date - Display only
- Actual Hours - Display only

3. You can also choose these icons to view additional information.
    - - Service Call Time Stamps
    - - Appointment history
    - - Service Call Tasks
    - - Add a Note. See Working with notes (see page 35).

    > If a note exists for this appointment, this icon displays as .

    - - Related appointments
    - - Service Call Quick Print
    - - Notify Customer
4. Choose *Save*.

View or edit 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 information about the location of the appointment.
3. In the **Job Details** area, you can view and change additional information in most of the fields. Additional fields may display depending on Schedule settings.
    - Customer Name
    - Location Name - Billing address
    - 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
4. You can also choose these buttons to complete other tasks.
    - - Appointment history
    - - Add a Note. See Working with notes (see page 35).

> If a note exists for this appointment, this icon displays as .

- - Related appointments

5. Choose *Save*.

View or edit the service call

You can easily view the service call from the schedule board.

1. Right-click the appointment and then choose *Open Service Call*.
2. The following fields can be edited:
   - Division
   - Description
   - Service Call Status
   - 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.
   - Caller Name/Email/Phone
3. You can choose any of these icons to view additional information:
   - - Service Call Time Stamps
   - - Service Call Tasks
   - - Service Call Notes
   - - View Attachments
   - - Related appointments
   - - Notify Customer
4. Choose *Save*.

Create additional appointments

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

You create an additional appointment by right-clicking on an existing appointment for the service call.

To create an additional appointment:

1. Right-click on the existing appointment on the schedule or in the unscheduled list, choose *Create New Appointment*.
2. 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 calendar.
   To use the calendar:
   a. Choose the date in the field and then choose the correct date in the calendar.
   b. At the bottom of the calendar, choose the hour to display a pop-up of hours. Choose the minutes to display the minutes in increments of 15.
3. Enter any additional information as needed.
4. Choose *Save* to add the appointment to the schedule.
5. 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 Appointment**.
- Double-click an appointment, change the **Status** in the appointment details window to **COMPLETE**, and then choose *Save*.

When an appointment is completed and saved, this information applies:

- The **Actual Hours** field in the appointment details window is available. If the actual length of the appointment changed from the estimated hours, enter that time in this field and save the changes.
- 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 actual completion date/time will be 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 28)
- Unscheduling an appointment (see page 29)
- Unassigning an appointment (see page 29)

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**.

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 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.

1. From the schedule board, right-click on a resource or any appointment/activity.
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.
    - **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 Appointment (see page 29)
    - Job Appointment (see page 29)
    - Technician Activity (see page 30)

Service Appointment

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

1. Choose the **Service Call Number**.
2. 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.
3. Enter a **Description**.
4. Choose the **Appointment Status**.
5. The **Start Date** defaults to today's date and midnight. You can edit the date and time.
6. The **End Date** defaults to today's date.
7. Enter the **Estimated Hours**.
8. 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.
9. Mark the weekend days to skip from scheduling appointments.
10. Choose *Create*.

Job Appointment

1. Choose the **Job Number**.

2. Choose the **Cost Code**.
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.
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*.

Technician Activity

1. Choose the **Activity ID**.
2. 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.
3. Enter a **Description**.
4. Choose the **Appointment Status**.
5. The **Start Date** defaults to today's date and midnight. You can edit the date and time.
6. The **End Date** defaults to today's date.
7. Enter the **Estimated Hours**.
8. 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.
9. Mark the weekend days to skip from scheduling appointments.
10. Choose *Create*.

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 Event Trigger Notifications in Signature Agent 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)
- Appointment Completed

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.

Context-sensitive options for resource appointments on the Schedule Board

Right-click on a resource 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 28).
  - Dispatched
  - In Route
  - Open
  - Paged
  - Re-assigned
  - 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 28).
- **Appointment Wizard** - Opens the appointment wizard. See Using the appointment wizard (see page 29) for more information.
- **New Appointment** - Opens the New Appointment/Activity window to create a new appointment based on the current appointment. See Create additional appointments (see page 27).

Context-sensitive options for resources on the Schedule Board

Right-click on a resource name to the left of the Schedule board to access the following options:

- **New Resource Activity** - Opens the Resource Activity window. See Create a resource activity (see page 33) for more information.
- **Appointment Wizard** - Opens the appointment wizard. See Using the appointment wizard (see page 29) for more information.
- **Print Resource Schedule**
  - Schedule Resource Report
  - Report Wizard
- **Unschedule All** - This option will unschedule all appointments scheduled for this technician.

- **Unassign All** - This option will unassign all appointments assigned to this technician.

See also:

- View resource details (see page 32)
- Unschedule or unassign resources (see page 32)
- Identify over-allocated resources (see page 33)
- Create a resource activity (see page 33)
- View or change resource activities (see page 34)

View 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

Unschedule or unassign 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.

Identify 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.

Create 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*.

View or change 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 (see page 34)
- Resource Schedule (see page 34)
- Using the Resource Report Wizard (see page 35)

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. Choose View Report to see your changes.

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

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

- Service call (including notes assigned to customers and locations)
- Service appointment
- Job appointment.

Available note types are customer, location, service call, job, and contract. Notes can be added from the Appointment context-sensitive menu on the Schedule Board, the Appointment Details window, and from the Customer Hub.

View or change an appointment note

1. On the schedule board, double-click the appointment to open the Details window.
2. Choose the *Notes* button. The Notes window displays. If the Notes icon displays as blank , no notes are available.
3. Double-click the note, or select the note and choose **Select**. The Note Detail window is displayed.
4. Make any changes and choose *Save*.

Create a note

1. On the schedule board, right-click the appointment and choose **Add New Appointment Note**.

   You can also double-click the appointment to open the Details window. Then choose the *Notes* icon.

2. Choose *Add New Note* icon. The Note Detail window is displayed.
3. Enter the **Subject**.
4. The author defaults to the current user however you can choose a different author.
5. Specify whether the note serves as a reminder note (**Reminder**) and/or can be printed (**Printable**).
6. Enter the note text in the box.
7. Choose *Save*.

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 a job appointment.

View a service call attachment

1. On the schedule board, right-click the service appointment, and then choose *Open Service Call*.
2. Choose the *Attachment* icon. If an attachment exists, the icon displays as .
3. In the Attachments for Service Call window double-click the attachment to view.

Add an attachment to a service call

1. On the schedule board, right-click the service appointment, and then choose *Open Service Call*.
2. Choose the *Attachment* icon.
3. In the Attachments for Service Call window, choose *Add New Attachment* icon. The Attachments window is displayed.
4. Enter the **Description**.
5. Edit the **Date**, if needed.
6. Select *Choose File*.
7. In the Open window, choose the file and then choose *Open*.
8. Choose *Upload File*.
9. Close the Attachments for Service Call window.

View a service appointment attachment

1. On the schedule board, double-click the service appointment to open the service appointment window.
2. Choose the *Attachment* icon. If an attachment exists, the icon displays as .
3. In the Attachments window double-click the attachment to view.

Add a service appointment attachment

1. On the schedule board, double-click the service appointment to open the service appointment window.

2. Choose the *Attachment* icon.
3. In the Attachments window, choose *Add New Attachment* icon. The Attachments window is displayed.
4. Enter the **Description**.
5. Edit the **Date**, if needed.
6. Select *Choose File*.
7. In the Open window, choose the file and then choose *Open*.
8. Choose *Upload File*.
9. Close the Attachments window.

View a job appointment attachment

1. On the schedule board, double-click the job appointment to open the job appointment window.
2. Choose the *Attachment* icon. If an attachment exists, the icon displays as .
3. In the Attachments window double-click the attachment to view.

Add a job appointment attachment

1. On the schedule board, double-click the job appointment to open the job appointment window.
2. Choose the *Attachment* icon.
3. In the Attachments window, choose *Add New Attachment* icon. The Attachments window is displayed.
4. Enter the **Description**.
5. Edit the **Date**, if needed.
6. Select *Choose File*.
7. In the Open window, choose the file and then choose *Open*.
8. Choose *Upload File*.
9. Close the Attachments window.

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 37)
- Viewing customer information (see page 38)
- Creating customers, locations, and service calls (see page 38)
- Filtering and sorting data (see page 38)
- Buttons on this window (see page 39)

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

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 39).
- **Location** - Display's the customer location's details. See Viewing the Location tab (see page 40).
- **Open Appointments** - Displays any open appointments for the customer. See Viewing the Open Appointments tab (see page 41).
- **Service Calls** - Displays the customer location's service calls. See Viewing the Service Calls tab (see page 43).
- **Equipment** - Displays the customer's equipment. See Viewing the Equipment tab (see page 45).
- **Contacts** - Displays the customer's contacts. See Viewing the Contacts tab (see page 46).
- **Contracts** - Displays the customer's contracts. See Viewing the Contracts tab (see page 48).
- **Jobs** - Displays the customer's jobs. See Viewing the Jobs tab (see page 49).

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 51).
- **Location** - See Creating a new location (see page 52).
- **Service Call** - See Creating a new service call (see page 51).

Filtering and sorting data

- **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.
- **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.
- **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 7).
	**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)
	**Column Tool** - Select to display a list of available columns to display/hide. Mark to display the checkbox, unmark 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 51).

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 Level
    - Receivables Status

- User_Define_1a

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

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 52).

> 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. You can view the display-only customer location information::
    - 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. You can view and/or add location notes and attachments. See Working with notes and attachments[6].

5 https://docs.key2act.io/display/NewTopics/Working+with+notes+and+attachments
6 https://docs.key2act.io/display/NewTopics/Working+with+notes+and+attachments

Viewing the Open Appointments tab

You can view the open appointments for the customer location.

- Viewing open appointments (see page 41)
- Filtering and sorting data (see page 42)
- Buttons on this window (see page 42)
- Available data columns (see page 42)

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. 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 35).
   - **View Note** - Opens the Notes/Attachments window. See Working with notes and attachments[7]. (Displays if a note exists.)
   - **Open Service Call** - Opens the Service Call window on the Schedule tab. See View or edit the service call (see page 27).
   - **Open Appointment** - Opens the Service Appointment window on the Schedule tab. See View or edit service appointment details (see page 25).
   - **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[8].
   - **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[9].
4. 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 35).
   - **View Note** - Opens the Notes/Attachments window. See Working with notes and attachments[10]. (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 View or edit job appointment details (see page 26).
   - **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[11].
   - **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[12].

7 https://docs.key2act.io/display/NewTopics/Working+with+notes+and+attachments
8 https://docs.key2act.io/display/NewTopics/Unscheduled+or+unassigned+appointments
9 https://docs.key2act.io/display/NewTopics/Unscheduled+or+unassigned+appointments
10 https://docs.key2act.io/display/NewTopics/Working+with+notes+and+attachments
11 https://docs.key2act.io/display/NewTopics/Unscheduled+or+unassigned+appointments
12 https://docs.key2act.io/display/NewTopics/Unscheduled+or+unassigned+appointments

Filtering and sorting data

- **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.
- **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.
- **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 7).
	**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)
	**Column Tool** - Select to display a list of available columns to display/hide. Mark to display the checkbox, unmark 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 51).

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. Right-click a service call and choose from the following:
    - **Add Note** - Opens the Service Call note window. See Working with notes and attachments[13].
    - **Add Attachment** - Opens the Service Call attachment window. See Working with notes and attachments[14].
    - **View Note** - Opens the Notes/Attachments window. See Working with notes and attachments[15]. (Displays if a note exists.)
    - **View Attachment** - Opens the Notes/Attachments window. See Working with notes and attachments[16]. (Displays if an attachment exists.)
    - **Open Service Call** - Opens the Service Call window on the Schedule tab. See View or edit the service call[17].

Filtering and sorting data

- **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.
- **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.

13 https://docs.key2act.io/display/NewTopics/Working+with+notes+and+attachments
14 https://docs.key2act.io/display/NewTopics/Working+with+notes+and+attachments
15 https://docs.key2act.io/display/NewTopics/Working+with+notes+and+attachments
16 https://docs.key2act.io/display/NewTopics/Working+with+notes+and+attachments
17 https://docs.key2act.io/display/NewTopics/View+or+edit+the+service+call

- **Column Order** - Drag the column headers to the left or right to change the column order.
- **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 7).
	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)
	Column Tool - Select to display a list of available columns to display/hide. Mark to display the checkbox, unmark 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
- Contract Number
- Estimate Hours
- Affiliate
- Region
- Branch
- Resolution
- Modified Date
- Bill Customer
- Bill Location
- Modified User
- Priority UDF Label
- UDF 3 Label
- UDF 4 Label
- Opened Date
- Service Call Source
- Service Call Source ID 1
- Service Call Source ID 2

- Original Work Order
- Job Number
- UDF 1 Label
- UDF 2 Label

Viewing the Equipment tab

You can view the customer location's equipment.

- Viewing equipment (see page 45)
- Filtering and sorting data (see page 45)
- Buttons on this window (see page 46)
- Available data columns (see page 46)

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[18].
    - **Add Attachment** - Opens the Service Call attachment window. See Working with notes and attachments[19].
    - **View Note** - Opens the Notes/Attachments window. See Working with notes and attachments[20]. (Displays if a note exists.)
    - **View Attachment** - Opens the Notes/Attachments window. See Working with notes and attachments[21]. (Displays if an attachment exists.)

Filtering and sorting data

- **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.
- **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.
- **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.

18 https://docs.key2act.io/display/NewTopics/Working+with+notes+and+attachments
19 https://docs.key2act.io/display/NewTopics/Working+with+notes+and+attachments
20 https://docs.key2act.io/display/NewTopics/Working+with+notes+and+attachments
21 https://docs.key2act.io/display/NewTopics/Working+with+notes+and+attachments

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 7).
	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)
	Column Tool - Select to display a list of available columns to display/hide. Mark to display the checkbox, unmark 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.

Viewing the Contacts tab

You can view the customer location contacts.

- Viewing location contacts (see page 47)
- Filtering and sorting data (see page 47)
- Buttons on this window (see page 47)
- Available data columns (see page 47)

Viewing location contacts

1. To view the location contacts, choose a customer in the Customer Hub.
2. In the details section of the Customer Hub, choose the **Contacts** tab.

Filtering and sorting data

- **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.
- **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.
- **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 7).
	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)
	Column Tool - Select to display a list of available columns to display/hide. Mark to display the checkbox, unmark to hide.

Available data columns

The default columns that display are:

- Contact Name

- Local/Agency
- Role Type
- Phone Number
- Organization
- Quick Note
- User_Defined_1_ID
- User_Define_5

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[22].
    - **Add Attachment** - Opens the Service Call attachment window. See Working with notes and attachments[23].
    - **View Note** - Opens the Notes/Attachments window. See Working with notes and attachments[24]. (Displays if a note exists.)
    - **View Attachment** - Opens the Notes/Attachments window. See Working with notes and attachments[25]. (Displays if an attachment exists.)

Filtering and sorting data

- **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.
- **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.
- **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.

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

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 7).
	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)
	Column Tool - Select to display a list of available columns to display/hide. Mark to display the checkbox, unmark 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 (see page 50)
- Filtering and sorting data (see page 50)
- Buttons on this window (see page 50)
- Available data columns (see page 50)

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 and sorting data

- **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.
- **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.
- **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 7).
	**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)
	**Column Tool** - Select to display a list of available columns to display/hide. Mark to display the checkbox, unmark 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*.

Working with Service Requests

Service requests display in the Service Request tab.

> ⚠ If you have this add-on but you do not see the Service Requests tab, contact your administrator. In addition to the ESMS integration setup, user role permissions need to be set.

Processing service requests

Processing service requests involves the following steps:

1. Accessing the Service Requests tab (see page 53).

2. The first time you create a service call from a service request, you will need to map the Signature fields (see page 55) so that the ServiceChannel customer and location name/ID are matched to the Signature customer and location name/ID. (This information is stored for any subsequent service requests.)
3. You may need to create a new customer or new location (see page 55) for an existing customer.
4. Accepting or rejecting service requests (see page 54).
5. If the service request contains an NTE (not to exceed) invoice amount (see page 56), you may need to create a service quote in Signature.
6. Creating a service call (see page 56).
7. Viewing/editing the service call (see page 56) in the Service Call window in the dispatch board on the Schedule tab. Use this window to add or edit additional service call information.

> If a service request is updated with ServiceChannel, an email notification is sent to the dispatcher (see page 57). The notifications are set to the email address(es) that are set up in Signature Agent.

Related topics:

- Accessing the Service Requests tab (see page 53)
- Accepting or rejecting a service request (see page 54)
- Mapping customer information (see page 55)
- Creating a new customer and/or new location (see page 55)
- Working with NTE service requests (see page 56)
- Creating a service call (see page 56)
- Viewing/editing a service call (see page 56)
- Receiving Dispatcher email notifications (see page 57)

Accessing the Service Requests tab

1. You can access the **Service Requests** tab 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*.
2. Choose the **Service Requests** tab to display the list of new or accepted service requests from the service aggregator. These are the default columns but you can add other columns as needed by choosing the **Insert Column** icon.

   The following is a list of the default columns along with information on where the information originates. Additional columns may display.

Field	ESMS/Signature	Service Aggregator
Received	x	
Client Name		x

Field	ESMS/Signature	Service Aggregator
Customer Number	x	
Location Number	x	
Service Description*		x
Priority		x
Address		x
Request Status	x	x
PO Number		x
Service Call	x	
Service Call Status	x	

The **Service Description** information is combination of the Description and the Caller information that is manually-entered in the ServiceChannel request form. When viewing the service request details, the **Caller Name**, **Phone**, and **Email Address** that display are the contact details for the **Location**.

3. Columns may be sorted by choosing the column header. An indicator displays the sort direction A-Z or Z-A .
4. You have the option to search each column by choosing the lookup icon.

Accepting or rejecting a service request

You can accept or reject a service request in one of two ways.

- Right-click the service request and then choosing **Accept** or **Reject**.
- Opening the service request and then choose the *Accept* or *Reject* button.

A *Rejected* service request will not display on the Service Requests list. This list displays New or Accepted service requests.

Service request cancelled from the service aggregator

A service request may be canceled by the service aggregator client (your customer). If this should happen, the status of the service request will change to Cancelled and the request will no longer be displayed in the Service Request list. If a service call has been created, the dispatcher will receive an email notification and will have to manually cancel the appointment.

Scenario	Result	Notification
Customer cancels a New service request.	Service request status is updated to Cancelled and drops from the Service Request list.	No
Customer cancels an Accepted service request, no service call created.	Service request status is updated to Cancelled and no longer displays in the Service Request list.	No
Customer cancels a service request that has a service call and appointment created.	Dispatcher receives an email notification of the status change and will need to manually update the appointment.	Yes

For more information about dispatcher notifications, see Receiving Dispatcher email notifications (see page 57).

Mapping customer information

The first time that you are generating a service call for a specific customer, you need to map the fields from ServiceChannel to Signature fields. Once a customer has been mapped, the fields will automatically display the next time they request service. Mapping the fields is performed when you are viewing the service request information. The lookup fields for the Customer ID and Location ID display only when a link hasn't been established between the service aggregator and ESMS and Signature location.

1. Choose the Service Request.
2. In the detail window that displays, choose **Select Customer**.
3. In the initial display, the list of customer names is filtered to display all customer names that contain the Client Name from ServiceChannel.
4. Choose *Clear* to display a list of all customer names.
5. Choose the Signature Customer Name.
6. You are returned to the service request detail information with the Signature Customer Name displayed.
7. To set the Signature Location ID, choose **Select Location**.
8. The Location display list contains the locations associated with the Signature Customer.
9. Choose to **ACCEPT** the service request.

Creating a new customer and/or new location

If a service request is from a new customer or an existing customer with a new location, you can add this information in the Service Request details window. The information entered here will update Signature as well as add the customer and/or location (site) to ESMS.

1. Choose the service request.
2. In the detail window that displays, choose the **Add Customer** icon.
3. Enter the customer information.

4. You are returned to the service request detail information with the Signature Customer Name displayed.
5. To add a new location, choose the **Add Location** icon.
6. Enter the location information.
7. Choose to **ACCEPT** the service request.

Working with NTE service requests

If a service request is generated with a not-to-exceed (NTE) amount, after the service request has been accepted, you will need to manually create a service quote in Signature Service Management. If the service provider doesn't agree with the amount, they can contact the customer to negotiate the NTE. When the service aggregator is updated, the service request in Schedule is updated and a notification email is sent to the dispatcher. See Receiving Dispatcher email notifications (see page 57) for more information.

Creating a service call

1. A service call is generated in one of the following methods:
    - **Method One: Automatically opening the Service Call window when the request is accepted.** When the Service Request is accepted, the Service Call window automatically opens in the Dispatcher window on the Schedule tab;

      > This auto process feature is available under ESMS Integration Settings found in Settings.

    - **Method Two: Manually used context-sensitive menu.** Right-click on the service request and then choose **Create Service Call**; To edit the Service Call, right-click on the Accepted Request and choose Open Service Call to open the window in the Dispatcher window on the Schedule tab.
    - **Method Three: Manually using service request detail section.** Choose the Accepted service request to display the detail information, and then choose *Create Service Call*. To edit the Service Call, right-click on the Accepted Request and choose Open Service Call to open the window in the Dispatcher window on the Schedule tab.
2. The Service Call Description field contains the service aggregator's service description and the requestor's name.
3. After the service call has been created, access the service call window by right-clicking on the service request and choosing **Open Service Call**. The Service Call window displays on the Schedule browser tab. From this window you can add/edit additional information.

Related topics:

Viewing/editing a service call

If the service request has been accepted and a service call was generated, you can view the service call by right-clicking on the accepted service request and then choosing **Open Service Call**. The service call is displayed in the Service Call window in Schedule. You can add or edit the information in this window.

> The **Description** field in the service call contains the description and caller name as entered in the service aggregator. (In ServiceChannel, this is the name entered in the Caller field.) On the service request, the Request Contact information is associated with the Signature Location. This information populates the Caller Name, Email Address, and Phone fields on the service call.

Receiving Dispatcher email notifications

When working with service requests that are generated from a service aggregator, there may be instances that the service request is updated through the service aggregator. The notifications are emailed to the Dispatcher Email Address(es) that were marked in Signature Agent. See Setting up the ServiceChannel integration (see page 18) for more information.

- A notification email is sent if either the Scheduled Date, Scheduled Time, Priority, and/or the NTE amount has been updated by the customer through the service aggregator.
- A cancellation notification email is sent if the customer cancels the service request at any time.

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 15) for more information.

Viewing appointments on map

Access Map View

1. To open Map View, choose the *Map View* icon.
2. The Map and Route Resources window opens and displays 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 15) in Configuration settings.

   The default icons are:
   - ? Unknown Attachment - Resource
   - - Scheduled appointment
   - - Unscheduled appointment
   - - Unassigned appointment

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*.

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 *Select Resource for Routing*.
2. Choose the resource.The resources that are displayed on the schedule board are listed.
3. 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.
4. The appointments are listed in the order that they display on the schedule board.
5. 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.

View unscheduled/unassigned appointments on map

In Schedule, you can view an unscheduled or unassigned appointment quickly on the map.

1. In Schedule, in the Unscheduled section, right-click on an unscheduled or unassigned appointment.
2. 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.

3. The Map View window opens with the pop-up window with the appointment details displayed over the icon.

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 *Menu* icon .
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 *Menu* icon .
2. Choose *About*.
3. Choose *Clear Customer Hub Cache*.

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 (see page 16) 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 (see page 15).

Schedule board isn't updating

Refresh the Schedule Board

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