WennSoft

Schedule

User Guide

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Schedule Overview

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

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

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

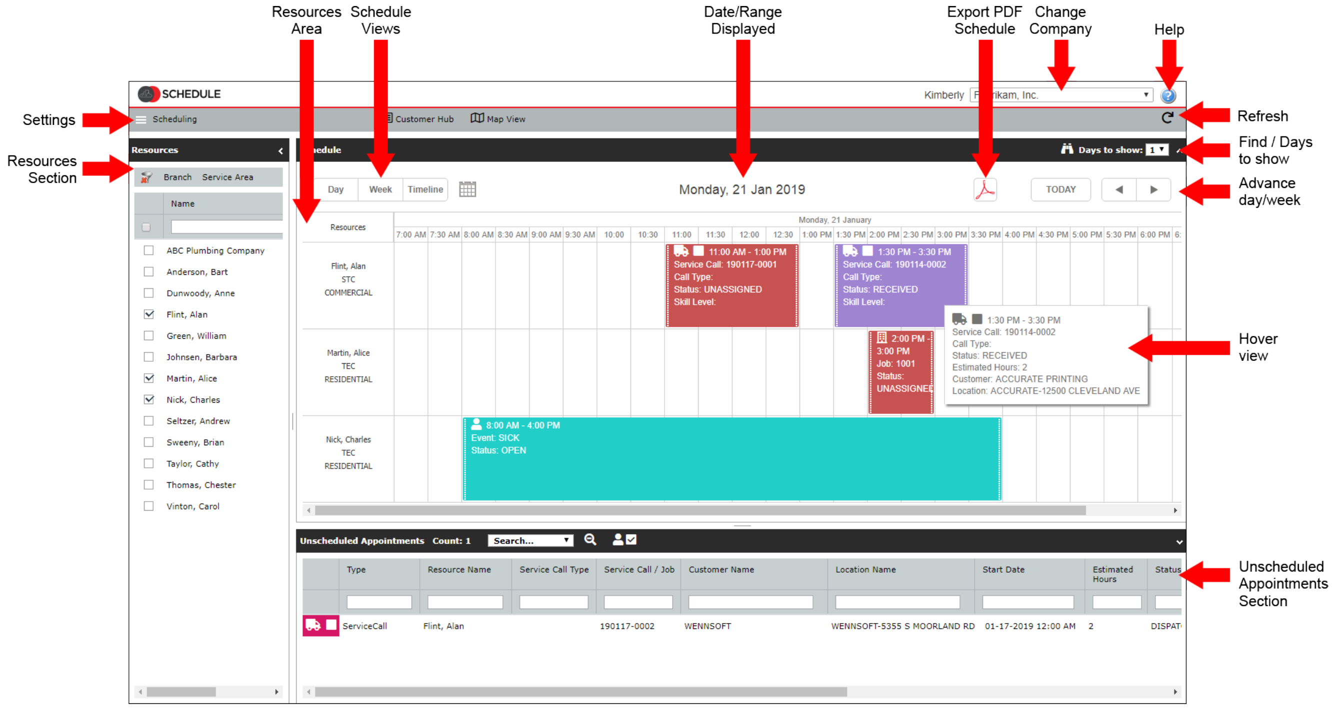
Users can complete these types of activities:

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

Viewing the Schedule Board

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

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



Appointments and Appointment Types

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

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

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

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

Context-Sensitive Menus

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

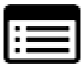
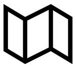
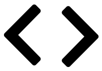
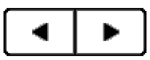
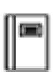
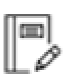
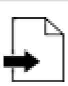
Action	Available on these Appointment Types
Set Status Set or update the appointment or activity status.	• Job appointment • Service appointment • Resource activity
Unschedule Appointment The appointment time is set to 12:00 AM. The appointment is moved from the schedule board to the Unscheduled Appointments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

Action	Available on these Appointment Types
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
New Service Call - <customer>-<location> Opens the New Service Call window on the Schedule tab with the Customer Number, Customer Name, Location Name, Division, Bill Customer Name, and the Bill Address Code defaulting from the service appointment (Schedule) or the customer/location (Customer Hub).	• Service appointment • Customer/location (Customer Hub)
Create New Appointment Opens the New Appointment/Activity window to create a new appointment based on the current appointment.	• Job appointment • Service appointment • Resource activity
Add Appointment Note Adds a note to the service appointment.	• Job appointment • Service appointment
View Customer Details Opens the Customer Hub with the customer/location highlighted and the information displayed in the details section.	• Job appointment • Service appointment
View Location Details Opens the Customer Hub with the customer/location highlighted and the information displayed in the details section.	• Job appointment • Service appointment
New Resource Activity Opens the New Resource Activity window with resource information in the Resource field.	• Resource

Action	Available on these Appointment Types
Print Resource Schedule • **Schedule Resource Report** Prints the technician's schedule for the day. • **Report Wizard** Opens the Resource Schedule Report wizard. You can select 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.
	Indicates a service appointment.
	Indicates a job appointment.
	Indicates a resource appointment.
	Show All Resources in Unscheduled Appointments.

Icon or button	Description
	Select to open the Customer Hub (in a separate browser window).
	Select 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.
	Select to select a specific date to display on the schedule.
	Moves the schedule forward or back by one day.
	Select to print a service call quick print.
	Indicates that the service call has no attachments. Select this to open the Add Attachment window.
	Indicates an attachment is available. Select this to open the Attachments window.
	Indicates that the service call or appointment has no notes added. Select this to add a note.
	Indicates that the service call or appointment has at least one attached note. Select 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.
	Use the Find icon to search within a grid. This icon appears on the Schedule Board and on the Customer Hub. For more information on using the Find feature, see Locating a Record Using Find on page 8.
	Use the Export icon to export your Find results to an Excel spreadsheet. The filename defaults to the Find type and today's date.

Filtering and Sorting Data

Filtering, Sorting, Rearranging Data

Use your mouse to drag or select the options below:

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

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

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

Buttons on This Window

Some of these buttons may not be available, depending on the window you are viewing.

Button	Description
	Find For information on locating records using the *Find* icon, see Filtering and Sorting Data on page 7.
	Delete Select an appointment and then select to delete the appointment.
	Clear Filter Select to clear the current search results filters.

Button	Description
	Refresh Reloads the results from the database.
	Export Select to export all data or selected rows to an Excel spreadsheet. For information on exporting data, see Exporting Find data on page 9.
	Column Tool Use the Column Tool to select fields to display from a list of available columns. Mark to display the checkbox, unmark the checkbox to hide.

Using the Context-sensitive Menus

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

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

Locating a Record Using Find

Select 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, select the **Find** icon.
2. Select the **Find Type**:
   - **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).
    - **Maintenance Contracts**
      Search for a service appointment using a full or partial maintenance contract number.
    - **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.
    - **BOB WO ID#**
      Search for service appointment(s) using a partial or full BOB work order number.
  - **If searching from the Customer Hub:**
    - **Contact Name**
      Search for location contacts using a partial or full contact name.
    - **Phone Number**
      Search for a customer using a full or partial customer phone number.
    - **Maintenance Contract**
      Search for a customer and location using a full or partial maintenance contract number.
3. Enter the **Find Data**.
4. Enter the **From/To Dates**. The default dates reflect the Unscheduled Days Back to Retrieve from Schedule Settings. For example, if you have this set to retrieve 14 days back, the date range will displays 14 days back from today's date and 14 days forward from today's date. For more information, see Setting up company options on page 16.

   > ⚠ The Find window accessed from the Customer Hub does not display the date range.

5. Select **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 on page 0 below for more information.

Working with the Search Results

In the search results section, you can sort and/or filter the results. See Filtering and Sorting Data on page 7.

Exporting Find Data

You have the option to export all data or a specific row to an Excel file.

1. On the far left side of the window, select the **Export** icon.
2. From the menu, select either **Export all data** or **Export select rows**.
3. Select the download location and then select *Save*.

   > ⚠ When opening the Excel file and you are prompted to Enable Editing, select *Yes*. If you select *No*, some of the column headers may not display.

Viewing Your User Profile

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

The user profile window displays the following information:

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

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

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

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

Changing Your Schedule Password

1. Access your Schedule user profile by choosing the drop-down next to your name displayed in the top right corner in Schedule.
2. Select the Change Password icon to open the Change Password window.
3. Enter your current password.
4. Enter the new password.
5. Confirm the new password.
6. Select *CHANGE PASSWORD*.

Logging out of Schedule

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

Setting Up Schedule

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

Administration Setup

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

Complete the following setup options:

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. Select the menu ☰ icon in the top left corner next to Scheduling.
4. Select **Administration**.
5. Select the **User Detail** tab.
6. In the Users section, select + *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**
     Select the time zone
   - **ERP User ID**
     From the drop-down, select the username that is used in Microsoft Dynamics GP for the user.
   - **Default Company**
     Select the default company. This is the company that will display, but you are able to change the company. See Changing Companies on page 41 for more information.
   - **Disabled**
     This checkbox is used to disable the user.
   - **Password/Confirm Password**
     Enter the password to use for logging into Schedule. Re-enter the password in the **Confirm Password** field.
8. Select *Save*.
9. The user will be added to the *Users* section.

If you have already set up Roles on page 12, you can assign a role to this user:

1. In the **User Roles** section, select *Assign Role*.
2. In the **Available Roles** window, mark the **Role** checkbox.
3. Select *Assign Role*.

> Only users with an assigned role are able to log into Schedule.

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 the 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.

Topics:

Creating a New Role

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

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

6. Select *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 select the **Role Permissions**.
2. Mark or unmark the View, Edit, or Delete columns for the listed areas. Depending on the record, marking Edit will also allow users to create the record. For example, if you mark Edit for Service Calls, users will be able to create a new service call.
3. Select 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, select the menu ☰ icon in the top left corner next to Scheduling.
2. Select **Administration**.
3. Select the **User Detail** tab.
4. In the **Users** section, select the user.
5. In the **User Roles** section, select *Assign Role*.
6. In the **Available Roles** window, mark the **Role** checkbox.
7. Select *Assign Role*.

Deleting Roles

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

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

Setting Up Resource Options

The Resource Options tab is used to set up the technicians' starting location when using the Map View as well as setting up the communications information.

> - You will also need to fetch the latitude and longitude coordinates for the technicians' starting locations. See Geocoding Service Locations and Technician Locations on page 23 for more information.
> - To set up the technician's vehicle information, see Setting Up Vehicles on page 28.
> - For information on setting up the Map View, see Map View Setup on page 21.

- Setting up the Starting Home Address Information on page 13
- Communications Settings on page 14

To access the Resource Options:

1. In Schedule, select the menu ☰ icon in the top left corner next to Scheduling.
2. Select *Administration*.
3. Select the **Resource Options** tab.

Setting up the Starting Home Address Information

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

1. From the **Resource** section, select one or more resources.
   - If all or some of your technicians will be starting from the home office, you can multi-select the resources from the list and then enter the *shared* **Home Address information**.

- If some of your technicians are starting from a different location, select the technician and then enter that technician's **Home Address information**.

2. Select *Save*.

Communications Settings

If you are using Signature Agent for standard and/or advanced communications (HTML email notifications to customers), enter each technician's information. The name, position description, telephone number, and email address are required fields. For more information on setting up communications in Signature Agent, see the *Signature Agent* documentation.

- Changes made to the resource in this section are not saved back to the technician's records in the Signature.
- If you are using MobileTech Inspection Manager with MobileTech 9.0 or higher, the telephone number populates the technician telephone field in the MobileTech Inspector Web App. See Set Up the MobileTech Inspection Manager (optional)[2].

To enter Communications Settings:

1. Enter the following information:
    - **Resource Name**: The technician name defaults into this field.
    - **Position Description**: The resource position defaults into this field.
    - **Phone**: Enter the resource's telephone number.
    - **Email address**: Enter the company email address(es) that the resource uses. For multiple email addresses, separate with a comma.
    - **Notifications**: Mark if the resource should receive notifications at the email address(es) provided.
    - **Inactive**: Mark if the resource is currently inactive.
    - **Select resource image**: This image will display in the email that is sent to customers if you are using **Advanced Communications**.
2. Select *Save*.

Processing Requests

- **Reset resource location to home location**
  Select this option to reset the starting locations for all technicians as set up on the Resource Options tab. See Setting Up Resource Options on page 13 for more information. The Reset Resource Location process is also available to non-Admin users provided their user role has the Geocoding permissions assigned. See Resetting Resource Locations on page 26.
- **Get latitude and longitude for service locations**
  Select 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. This geocoding process is also available under the Hamburger menu to a non-Admin users provided their user role has the Geocoding permissions assigned. See Setting up Geocoding for Service Locations on page 23.
- **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.

2 https://docs.key2act.io/pages/viewpage.action?pageId=101319329

Setting up XOi Integration

The XOi Integration Setup in Schedule is used by XOi Technologies to access a specific API that is used by XOi for the Deep Linking workflow feature. This information must be provided to XOi. (A Schedule Administrator can print the contents of this window from a browser.) The XOi Integration Setup section is conditionally enabled if the See feature is registered for MobileTech, otherwise this tab is hidden. After setting up the integration, two XOi user roles are created and are hidden from the User Roles window. The XOi user is hidden from the User Detail window.

XOi Deep Linking is:

- Compatible with MobileTech v8 and higher.
- Available for supported versions of Signature 2016 and Signature 2018.
- Enabled in Schedule 4.5 and higher.

> **IMPORTANT**
>
> XOi Deep Linking must be first be enabled in MobileTech Admin. See XOi Integration[3][4] in the MobileTech 8.0 Installation & Administration Guide for more information.

To set up the XOi Integration in Schedule:

1. In Schedule, select the **Hamburger menu** ☰ and then select **Administration**.
2. Select the **Integrations** tab.
3. Under **Account Detail**:
   - **User Name**
     Displays the user name for the XOi integration.
   - **Password**
     Enter the XOi password.
   - **Confirm Password**
     Enter your XOi password again. If you've mistyped the password, an error message displays that the passwords don't match.
4. Under **Integration Details**, complete the following fields:
   - **API URL**
     Displays the Schedule API URL.
   - **Signature Version**
     Displays the current Signature major version.
5. In the **Active Dynamics Companies** section, all active companies' details (**Company Name** and **Company ID**) are shown as more than one company may need to be set up with XOi Technologies.

   > The Active Dynamics Companies list includes all active Dynamics companies that may or may not have Signature and/or Schedule installed.

General Setup

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

Complete the following setup options:

- Setting up Company Options on page 16

3 https://docs.key2act.io/display/MT80/XOi+Integration
4 https://docs.key2act.io/display/MT80/XOi+Integration

Setting up Company Options

These settings are defined for each company that you have.

> Depending on the Appointment Auto Reload setting under Global Options on page 20, you may need to select the Refresh button at the top right of the Scheduling view to see your changes.

Setting Up Schedule Configuration

1. In Schedule, select the menu icon and then select *General Settings*.
2. In **Company Options** under Schedule Configuration, complete the following fields, as needed:
   - **Schedule Days to Retrieve on Load (1-14)**
     Enter the number of schedule days to display.
   - **Unscheduled Days to Retrieve on Load (1-60)**
     Enter the number of unscheduled days to display.
   - **Time View Bar Height (pixels 17-200)**
     Enter the height of the resources rows that display on the schedule board.
   - **Week View**
     - **Number of Days in Week View**
       Enter the number of days to display in the Week View.
     - **Skip Saturday/Sunday**
       Mark the checkbox next to the weekend days to not display on the schedule.
   - **Default Appointment Start Time and Status**
     - **Default Start Time**: Enter the default start time to use when creating new service appointments, job appointments, or resource activities.
       - Appointment Wizard or New Resource Activity when accessed from right-clicking on a Resource.
       - New Service Appointment or New Job Appointment windows by right-clicking on an existing appointment on the Schedule Board or in the Customer Hub and selecting New Appointment from the context menu.

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

     - **Default Status**: Select the default Appointment Status to use when manually creating new appointments (or new schedule appointments from a new service call).

       > When opening the appointment form, appointment wizard, the status will default to the status chosen in this setting. The only time that DEFAULT will show in the appointment status list on the wizard or on a new appointment is when the new status option is set to DEFAULT.

- **Automatic Status Assignment (Drag & Drop)**
  Select 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**
    If this status is left blank, the appointment will default back to the Default Status (above).
  - **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 on page 21.

3. Select *Save*.

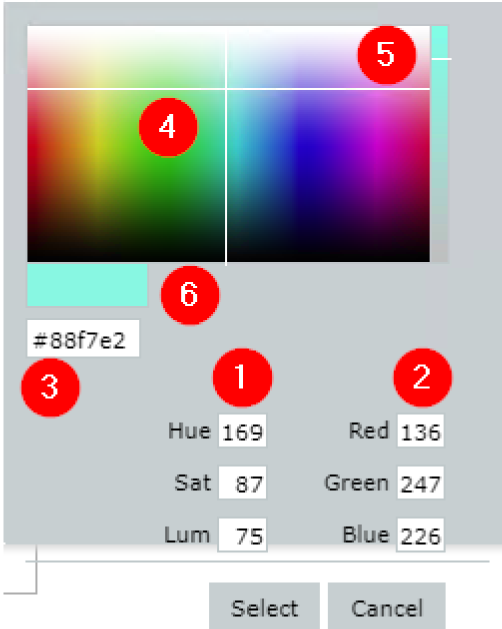
Setting Up Schedule Colors

You can set up custom colors that display on the schedule board.

1. In Schedule, select the menu ☰ icon and then select *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* below.
   - **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. Select 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. Select *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 select the field to the right of the label. After the color has been set up for the field, select *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 select 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).

Displaying Service Call, Appointment, & Equipment Form Fields

In the Service Call, Appointment & Equipment Form Fields section, you can choose the fields to hide/display when you open the service call, service appointment, job appointment, resource appointment, and/or equipment. Each form 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, & Equipment Form Fields**, choose to hide/display fields from the following tabs:

Service Call Fields			
Customer Number	Salesperson	Date/Time Lock	Original Service Call

Customer Name	Service Call Type	Estimated Hours	Caller Name
Address ID	Priority	Service Call Status	Caller Email Address
Location Name	Customer P.O. Number	Completion Date	Caller Phone
Service Call	Contract Number	Resolution	USER-DEFINED
Description	Equipment	Bill Customer ID	Service_User_Define_1
Problem Type	Resource	Bill Address ID	
Division	Start Date	Job Number	
Service Appointment Fields			
Customer Name	Description	Start Date	Priority
Location Name	Status	Estimated Hours	Completion Date
Service Call	Resource	Skill Level	Actual Hours
Appointment			
Job Appointment Fields			
Customer Name	Description	Resource	Priority
Location Name	Cost Code	Start Date	Completion Date
Job	Status	Estimated Hours	Actual Hours
Appointment			
Resource Appointment Fields			
Appointment	Status	Start Date	Completion Date
Activity	Resource	Estimated Hours	Actual Hours
Description	Description	Priority	

Equipment Fields			
Description	Building ID	Warranty Expires	Optimal Charge
Equipment Type	Building Room	Extended Warranty Type	Refrigerant Type ID
Manufacturer/Model	Sub Location	Extended Warranty Expires	Refrigerant Equipment Type
Serial Number	Installed Date	Service Level ID	USER-DEFINED 1
Bar Code ID	Installed By	Contract Number	

3. Choose *Save* at the bottom of each tabbed window.

Setting up Global Options

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

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

- Schedule Time Scale on page 20
- Appointment Auto Reload on page 20
- Date Display Setting on page 20
- Show Horizontal Scrollbar (Timeline view) on page 21
- Show Job Panel on page 21
- Display Resource Overallocation (Timeline view) on page 21
- Max Attachment Size (MB) on page 21
- Clearing Cache on page 21

Schedule Time Scale

Select the time scale to display on the schedule.

- 15 Minutes
- 30 Minutes
- 60 Minutes

Appointment Auto Reload

Select 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

Select the date format to display.

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

Show Horizontal Scrollbar (Timeline view)

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

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

Show Job Panel

Mark this checkbox to display the Job Panel on the right side of the Schedule Board. This option is available if you have Signature Job Cost registered. See Working with the Job Panel on page 71.

Display Resource Overallocation (Timeline view)

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

Max Attachment Size (MB)

Enter the maximum MB file size for attachments.

Clearing Cache

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

Clear Customer Hub Cache

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

Clear Application Cache

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

Map View Setup

Setting up mapping involves enabling the mapping option and its associated setup as well as setting up the starting location for technicians. Geocoding service locations and technician starting locations are also required for technicians and service appointments to be displayed on the map. See Setting Up Resource Options on page 13 and Geocoding Service Locations and Technician Locations on page 23.

The following steps must be completed to use the mapping feature:

Setting Up Mapping Options

1. In Schedule, select the menu ☰ icon and then select **General Settings**.
2. In Company Options under Schedule Configuration, in the Mapping Options section, select 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**. See Obtaining a Mapping Key[5] in the Installation and Upgrade Guide.
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**
      Select 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 select different icons at http://fontawesome.io/icons/
4. Select *Save*.

When the Google or Bing APIs are called

- **Geocoding Service Locations**
  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 *Fetch Coordinates* option in the Geocoding window. See Geocoding Service Locations and Technician Locations on page 23 for more information.
- **Geocoding Technician 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. In Schedule, this is the *Fetch Coordinates* option in the Geocoding window. See Geocoding Service Locations and Technician Locations on page 23 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 on page 79 or Creating a New Location on page 80.
- **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.

5 https://docs.key2act.io/display/SCHED47/Requirements+and+Compatibility#RequirementsandCompatibility-mappingapi

- **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.

Geocoding Service Locations and Technician Locations

Use the Geocoding window to obtain the Latitude and Longitude for Customer Service Locations or Technician Starting Locations. The Mapping API that is set up in Schedule Settings is used to obtain the coordinates. If you do not have a Bing or Google API key, you will be limited to 2500 records per day. For information on setting up the technician starting locations, see Setting Up Resource Options on page 13.

The Geocoding process is paginated as some users may have thousands of service locations and/or technicians. The lower-left corner provides the option to display 20, 50, or 100 results on the page. The lower right corner displays "Page 1 of x (x items)" at the lower right corner along with the page numbers. The current page number is highlighted. Geocoding only processes the *current* page. For example, if you have 500 service addresses and you've set the system to display 100 results, you will have five pages of service addresses. If you select the *Mark All* checkbox, you are only selecting the 100 service locations on the currently displayed page. You will need to process each page separately to complete the geocoding process on all service locations.

> The Service Location geocoding process is also available in Administrator Setup and provides the ability to process all the service locations at one time, instead of being limited to 100 records at a time. See Processing Requests on page 14.

Setting up Geocoding for Service Locations

Geocoding for Service Locations

In order for service locations to display on the Schedule Map, each location needs to have latitude and longitude coordinates. Use the Geocoding window to assign these coordinates quickly using the mapping system that you have set up to use with Schedule (Bing or Google Maps). You can select to display only those service locations that don't have coordinates or you can display all service locations. Displaying all the service locations will not overwrite any previously-entered values.

The Geocoding process is paginated as some users may have thousands of service locations. The lower left corner provides the option to display 20, 50, or 100 results on the page. The lower right corner displays "Page 1 of x (x items)" at the lower right corner along with the page numbers. The selected page number is highlighted. Geocoding only processes the *current* page. For example, if you have 500 service addresses and you've set the system to display 100 results, you will have five pages of service addresses. If you select the Mark All checkbox, you are only selecting the 100 service locations on the currently displayed page. You will need to process each page separately to complete the geocoding process on all service locations.

> The Mapping API that is set up in Schedule Settings is used to obtain the coordinates. If you do not have a Bing or Google API key, you will be limited to 2500 records per day. If you select to display all locations (by marking All Addresses) and you elect to fetch coordinates for a location where the geocode already exists, that location will be reprocessed and the latitude/longitude values will be rewritten in the location table even if the coordinates did not change.

To obtain service location coordinates:

1. In Schedule, select the **Hamburger menu** ☰ icon.
2. Select **Geocoding**.
3. From the **Entity** drop-down, select *Location*.
4. Select the **Address Field** that contains the street address for the entity. The Address1 field may contain non-street address content (for example, a post office box number), so those locations can be processed by using Address2 or Address3 fields. The geocoding process requires a street address to determine the latitude and longitude.
    - Address1
    - Address2
    - Address3
5. To display only service locations that don't currently have coordinates assigned, leave **All Addresses?** set to *Off*. However if you want to display all service locations, including those with coordinates already assigned, toggle **All Addresses?** to *On*.
6. Select *Fetch Address* to display the Service Locations.
7. The following columns display:
    - **Customer Number**
      This displays the Customer ID assigned in Signature.
    - **Location Number**
      This displays the Address ID assigned in Signature.
    - **Address**
      This displays the address in either the Address1, Address2, or Address3 field, depending on the selection from the Address field.
    - **City/State/Postal Code**
      Displays the City, State, and Postal Code from Signature.
    - **Latitude/Longitude**
      Displays existing latitude and longitude values, if the location has previously been processed for geocoding.
    - **Result**
      This column displays information after Fetch Coordinates is run.
        - *Success* displays for successfully obtaining the coordinates.
        - If there is an issue with obtaining the coordinates, the actual error message displays from the mapping system that you have set up (Google Maps or Bing Maps).
8. Mark the checkbox(es) to the left of the service locations that you want to fetch the coordinates for. You can mark/unmark all items checkboxes on the *current* page by marking the checkbox in the header section to the right of the Customer Number header title.
9. Select Fetch Coordinates to obtain the latitude and longitude coordinates for the marked service locations.
10. To save the latitude and longitude coordinates to the service location record, select *Update Coordinates*.

Filtering, Sorting, and Rearranging Data

Use your mouse to drag or select options below:

- **Group**
  To group the display by a column, select a column header and drag this to the area labeled *Drag a column header to the group location to group the results by that column* located to the top left of the columns. To undo the grouping, drag the column header back to anywhere on the grid, the column header returns automatically to its original location.
- **Sort order**
  Select the column header to change the sort order. A small triangle points to indicate if the sorting is ascending

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

- **Filter**
  Select the lookup to select 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. To clear the filters, select the **Clear Filter** icon located in the in the top right corner.
- **Column Order**
  Drag the column headers to the left or right to change the column order. The Customer and Location columns each have a main column header that lets you drag all three columns (Notes, Name, ID) at the same time. You can also rearrange the Notes, Name, and ID columns beneath both the Customer and Location headers.
- **Scrolling**
  A horizontal scrollbar is hidden until you hover with your mouse at the bottom of the grid. When the horizontal scrollbar displays, you can drag the bar to view more columns. A vertical scrollbar is automatically displayed.

Exporting Data

You have the option to export all data or specific rows to an Excel file. Exporting location addresses from the geocoding window is useful however this is most useful when the geocoding API returns error information that makes it impossible to successfully geocode a location address. By exporting these locations, you will have a working list of location records to be corrected to resolve “bad” or missing address information.

It is important to note that:

- If you select *Export all data*, this is ALL records, not just the displayed page of records. If you have 20,000 records and select to export all, they will all be included in the Excel file.
- To export only the displayed page of records, select the **Mark All** checkbox in the header section. This only marks the records on the current page. Then select *Export select rows*.
- You can also mark specific rows on multiple pages and export only those rows.

To export the data:

1. In Schedule, select the **Hamburger menu** icon.
2. Select **Geocoding**.
3. On the far left side of the window, select the Export icon.
4. From the menu, select either **Export all data** or **Export select rows**.
5. Select the download location and then select *Save*.

Setting up Geocoding for Technician Starting Locations

Geocoding Technician Starting Locations

Setting up geocoding for a technician location adds the latitude and longitude coordinates to their starting address record, which is used by the Routing process in the Schedule Map. Technician Location addresses are set up in Administration Setup on the Resource Options tab. The technician's location is their starting location for the day, which could be at their home or a work location. The geocoding process will determine the latitude and longitude of the technician's address and this information is used to position their vehicle on the Schedule map during the Routing process. See Setting Up Resource Options on page 13 for more information. Technicians can be assigned to a specific vehicle in Signature. See Setting Up Vehicles on page 28 for more information.

The Geocoding process is paginated as some users may have hundreds of technicians. The lower left corner provides the option to display 20, 50, or 100 results on the page. The lower right corner displays "Page 1 of x (x items)" at the lower right corner along with the page numbers. The selected page number is highlighted. Geocoding only processes the *current* page. For example, if you have 500 technicians and you've set the system to display 100 results, you will have five pages of technicians. If you select the Mark All checkbox, you are only selecting the 100 technicians on the currently displayed page. You will need to process each page separately to complete the geocoding process on all technician starting locations.

> The Mapping API that is set up in Schedule Settings is used to obtain the coordinates. If you do not have a Bing or Google API key, you will be limited to 2500 records per day. If you select to display all technician starting locations (by marking All Addresses) and you elect to fetch coordinates for a starting location where the geocode already exists, that location will be reprocessed and the latitude/longitude values will be rewritten in the location table even if the coordinates did not change.

To obtain technician starting locations:

1. In Schedule, select the **Hamburger menu** ☰ icon.
2. Select **Geocoding**.
3. From the **Entity** drop-down, select *Technicians*.
4. To display only the technicians that currently do not have coordinates assigned to their starting location, leave **All Addresses?** set to *Off*. To display all technicians, including those with coordinates already assigned, toggle **All Addresses?** to *On*.
5. Select *Fetch Address* to display the Technician Locations.
6. The following columns display:
    - **Technician Name**
      Displays the technician's long name.
    - **Address/City/State/Postal Code**
      Displays the address that was entered in the Resource Options setting window.
    - **Latitude/Longitude**
      Displays existing latitude and longitude values, if the location has previously been processed for geocoding.
    - **Result**
      This column displays information after Fetch Coordinates is run.
        - *Success* displays for successfully obtaining the coordinates.
        - If there is an issue with obtaining the coordinates, the actual error message displays from the mapping system that you have set up (Google Maps or Bing Maps).
7. Mark the checkbox(es) to the left of the technicians that you want to fetch the coordinates for. You can mark/unmark all checkboxes on the *current* page by marking the checkbox in the header section to the right of Technician Name.
8. Select *Fetch Coordinates*.
9. To save the latitude and longitude coordinates to the technician starting location record(s), select *Update Coordinates*.

Resetting Resource Starting Locations

In order to reset the technician's vehicle location to the same starting point each day for routing purposes, at the beginning of the work day, the dispatcher can reset all technicans to their starting home location. The technician starting locations are set up on the **Resource Options** tab in Administration Setup. See Setting up resource options[6] for more information.

To obtain technician starting locations:

1. In Schedule, select the **Hamburger menu** icon.
2. Select **Geocoding**.
3. On the far left side of the window, select *Reset Resource Locations*.

Filtering, Sorting, and Rearranging Data

Use your mouse to drag or select options below:

- **Group**
  To group the display by a column, select a column header and drag this to the area labeled *Drag a column header to the group location to group the results by that column* located to the top left of the columns. To undo the grouping, drag the column header back to anywhere on the grid, the column header returns automatically to its original location.
- **Sort order**
  Select the column header to change the sort order. A small triangle points to indicate if the sorting is ascending (A-Z) or descending (Z-A). Hold the Shift key when selecting headers to sort against multiple columns simultaneously.
- **Filter**
  Select the lookup to select 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. To clear the filters, select the **Clear Filter** icon located in the in the top right corner.
- **Column Order**
  Drag the column headers to the left or right to change the column order. The Customer and Location columns each have a main column header that lets you drag all three columns (Notes, Name, ID) at the same time. You can also rearrange the Notes, Name, and ID columns beneath both the Customer and Location headers.
- **Scrolling**
  A horizontal scrollbar is hidden until you hover with your mouse at the bottom of the grid. When the horizontal scrollbar displays, you can drag the bar to view more columns. A vertical scrollbar is automatically displayed.

Exporting Data

You have the option to export all data or specific rows to an Excel file. Exporting location addresses from the geocoding window is useful however this is most useful when the geocoding API returns error information that makes it impossible to successfully geocode a location address. By exporting these locations, you will have a working list of location records to be corrected to resolve “bad” or missing address information.

> It is important to note that:
> - If you select *Export all data*, this is ALL records, not just the displayed page of records. If you have 20,000 records and select to export all, they will all be included in the Excel file.
> - To export only the displayed page of records, select the **Mark All** checkbox in the header section. This only marks the records on the current page. Then select *Export select rows*.
> - You can also mark specific rows on multiple pages and export only those rows.

To export the data:

1. In Schedule, select the **Hamburger menu** icon.

6 https://docs.key2act.io/display/SCHED45/Setting+up+resource+options

2. Select **Geocoding**.
3. On the far left side of the window, select the Export icon.
4. From the menu, select either **Export all data** or **Export select rows**.
5. Select the download location and then select *Save*.

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. Select *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**
     Select 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. Select *Save*.

Report Setup

The following report needs to be manually deployed and have its locations set:

Job Schedule by Cost Code

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

Deploy the Report

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

Set Location Path

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

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

work in progress

Workorder Report

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

Set Location Path

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

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

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*.

Default Standard Triggers

- Appointment-AppointmentCanceled
- Appointment-AppointmentCreatedAndScheduled
- Appointment-AppointmentReassigned
- Appointment-AppointmentRescheduled
- Appointment-AppointmentScheduled
- Appointment-TechnicianArrived
- Appointment-TechnicianCheckedOut
- ServiceCall-ServiceCallCreated-2016+ - Email that is sent to your customer if they are using Signature 2016 or higher when a service call is created.
- ServiceCall-ServiceCallCreatedByEmail-2016+ - Email that your customers are sent after a service call is created from an email request from your customer.

Advanced Communications Triggers

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

- Appointment Scheduled
- Appointment Changed
- Appointment Completed
- Appointment Canceled
- Service Call Request Received
- Technician Arrived
- Technician Dispatched

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.

Schedule Configuration

Schedule Metadata

K2AServiceLibraryMeta is an endpoint that shows metadata for the other endpoints. For example, this displays the Appointment endpoint. The K2AServiceLibraryMeta endpoint URL can be found in Schedule > installLog.txt in the line Test service with URL: http://*yourserver:port*/KEY2ACTServiceLibrary/api/K2AServiceLibraryMeta. Copy the URL and paste it into your web browser. Firefox will display the JSON file appropriately. Chrome has extensions that can be added to format the JSON display.

> ⚠ If the value you are seeking is not currently present in the metadata, the value would have to be added by the development team as it requires a data model change. This is not a file that can be customized outside of development.

Grid Configuration

There are many grids in Schedule. A few examples of the primary grids are:

- Unscheduled/Unassigned Appointments
- Service Calls
- Equipment
- Location Contacts
- Maintenance Contracts
- Jobs

Each of these grids has a **columns.json** file that indicates the fields of data that can be displayed and the order, as well as the label for the field. There are some restrictions in some grids, where the first few fields are required to be present and in a certain location. Those restrictions are noted in the json files.

You can pick from these column values to tailor Schedule for your users.

- Adding a Column to a Grid on page 31
- Grid Column Formatting on page 32
- Column Filtering on page 33
- User-Defined Field Configuration on page 33
- Setting up a Field to Display in Schedule Service Call & Appointment Form Fields Settings on page 34

Adding a Column to a Grid

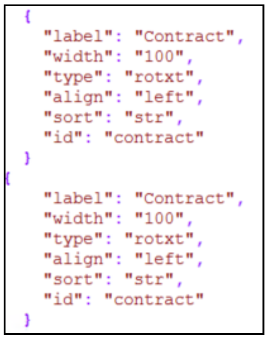
1. Open K2AServiceLibraryMeta in your browser. (See Schedule Metadata on page 30.) Locate the endPoint and objectProperties. Within each endPoint, objectProperties have been added that lists the properties associated with the endPoint with a method of GET by the object name, which are used in our JSON files. See the Example: endPoint List on page 37 for a list of endPoints you can add. This does not list the unvalidated user-defined fields (UDF).
2. Open the **columns.json** file located in C:\Program Files (x86)\Signature\Schedule\Scripts\K2A. Inside each of the grid folders, you will find the columns.json file. Open this file with a text editor.

   > ⚠ Only the grid folders that contain the columns.json file are customizable. If there isn't a columns.json file then the grid will only have the columns displayed.

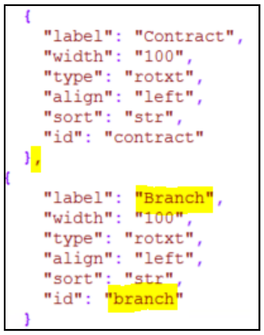
3. Locate the position where you want the column to display. For example, as the last column.

   > ⚠ Required columns and/or their required location are noted in the file.

4. Copy the information from the current last column, including the curly brackets **{ }**, and paste this directly below.
5. Add a comma '**,**' to the closing curly bracket **}** of the former last column.
6. Edit the following:
    - **"label"**: The information within the quotation marks displays as the column header.
    - **"id"**: Enter the field name exactly as it appears in the endPoint in K2AServiceLibraryMeta.
7. Save the *columns.json* file.
8. Launch Schedule and view the column that was just added. If the column doesn't display, you may need to reset the grid. Resetting the grid will reset the existing columns to their original location in the grid. To reset a grid, select *Menu* and then select *About*, select the grid name from the **Reset Grid** drop-down and then select *Reset*.



```
{
  "label": "Contract",
  "width": "100",
  "type": "rotxt",
  "align": "left",
  "sort": "str",
  "id": "contract"
}
{
  "label": "Contract",
  "width": "100",
  "type": "rotxt",
  "align": "left",
  "sort": "str",
  "id": "contract"
}
```



```
{
  "label": "Contract",
  "width": "100",
  "type": "rotxt",
  "align": "left",
  "sort": "str",
  "id": "contract"
},
{
  "label": "Branch",
  "width": "100",
  "type": "rotxt",
  "align": "left",
  "sort": "str",
  "id": "branch"
}
```

For example, to add the Service Call Creation Date to the Unscheduled Grid on the Schedule Board, add the following in the UnscheduledGrid\columns.json file:

```
{
"label": "SC Created",
"width": "150",
"type": "dhxcalendar",
"align": "left",
"sort": "date",
"id": "callCreationDate"
}
```

Grid Column Formatting

This section describes the columns.json file.

Label	Actual label that will be displayed on the header of the column.
Width	The width in pixels of the column. To make a column hidden set the size to 0.
Types	Defines the type of field the column contains. • "rotxt": Read only text field. • "ron": Read only numeric field • "dhxCalendar": Date field

Align	Defines the alignment for the column, including the header. • "left": Left aligned. • "center": Center aligned. • "right": Right aligned.
Sort	Defines the type of sorting for the column. • "str": Text sorting. • "date": Date sorting. • "int": Number sorting • "na": No sorting

Column Filtering

This section describes how filtering works in the filter boxes on the grid.

- **Text Filter**: A column type of "rotxt" will use a text filter. Retrieves values which contain mask defined through text field.
- **Numeric Filter**: A column type of "ron" will use a text filter that allows using comparison operators in it. Retrieves values which contain mask defined through text field.

The possible comparison operators are:

=	Equal to
>	Greater than
<	Less than
?	Less or equal to
>=	Greater or equal to
n1..n2	A range of values

User-Defined Field Configuration

In Schedule Setup, you have the capability to mark the fields to display in specific windows. For more information, see Service Call & Appointment Form Fields on page 18. If your company has utilized any of the user-defined fields (UDF) in Service Management that are not listed, you can add those fields to display as options in the Settings window, and then mark the checkbox to show the field(s). Conversely, if you do not want UDF fields to display in the Settings window, you can update this information.

The UDF files are found in ***your install location*\Schedule\WebServiceFiles\UDF**.

The files are:

- **AppointmentUDF.json** : Can be displayed on Service, Job, and/or Resource appointment window.
- **CustomerUDF.json** : Can be displayed on a Customer window.
- **LocationUDF.json** : Can be display on a Location window.

- **WorkOrderUDF.json** : Can be display on a Service Call window.

Example: for Location you could add User_Defined_9a as follows. Append the following to the LocationUDF.json file:

```
{
"Column": "Service_User_Define_9",
"Length": 0,
"Label": "This is my label to display",
"Type": "Date",
"IsUsed": true,
"wsiParameterName": ""
}
```

> ⚠ If **IsUsed** is *not* set to **true**, the field will not show up in settings for you to add to the displayed fields.

Setting up a Field to Display in Schedule Service Call & Appointment Form Fields Settings

For Service Appointments, Job Appointments and Technician Activities:

1. To display an appointment UDF field, open the **AppointmentUDF.json** file in a program that allows you to edit the file (example: Notepad). Edit the following fields within a set of braces { }.
   - **"Label"**: User defined label that displays for the property.
   - **"IsUsed"**: To display the field, change the **IsUsed** value to *true* .
2. Save the AppointmentUDF.json file.

For the Service Call form:
Once values are added into the WorkOrderUDF.json file, they become immediately available to add to the forms from the Schedule Settings window.

1. To display a service call UDF field, open the **WorkOrderUDF.json** file in a program that allows you to edit the file (example: Notepad++). Edit the following fields within a set of braces { }.
   - **"Label"**: User defined label that displays for the property.
   - **"IsUsed"**: To display the field, change the **IsUsed** value to *true* .
2. Save the WorkOrderUDF.json file.

Setting up a Field to Display in Schedule Service Call & Appointment Form Fields Settings

For Service Appointments, Job Appointments and Technician Activities:

1. To display an appointment UDF field, open the **AppointmentUDF.json** file in a program that allows you to edit the file (example: Notepad). Edit the following fields within a set of braces { }.
   - **"Label"**: User defined label that displays for the property.
   - **"IsUsed"**: To display the field, change the **IsUsed** value to *true* .
2. Save the AppointmentUDF.json file.

For the Service Call form:
Once values are added into the WorkOrderUDF.json file, they become immediately available to add to the forms from the Schedule Settings window.

1. To display a service call UDF field, open the **WorkOrderUDF.json** file in a program that allows you to edit the file (example: Notepad++). Edit the following fields within a set of braces { }.
   - **"Label"**: User defined label that displays for the property.

- **"IsUsed"**: To display the field, change the **IsUsed** value to *true* .

2. Save the WorkOrderUDF.json file.
3. For informatioin on how to add the user-defined field to the Schedule Appointment window, see Displaying Service Call, Appointment, & Equipment Form Fields on page 18.

Appointment Label and Tooltip Configuration

Appointment panel labels and tooltip labels are defined similarly using JSON files. These files are in: C:\Program Files (x86)\Signature\Schedule\Scripts\K2A\SchedulerControl.

```
[
  {
    "id": "workOrder",
    "label": "Work Order: ",
    "apptType": "WorkOrder"
  },
  {
    "id": "workOrder",
    "label": "Job: ",
    "apptType": "Job"
  },
  {
    "id": "technicianStatus",
    "label": "Event: ",
    "apptType": "Technician"
  },
  {
    "id": "workOrderType",
    "label": "WO Type: ",
    "apptType": "WorkOrder"
  },
  {
    "id": "appointmentStatus",
    "label": "Status: ",
    "apptType": [ "WorkOrder", "Job", "Technician" ]
  }
]
```

The files are:

- **eventContent.json** : Appointment panel labels
- **tooltipContent.json** : Appointment tooltip labels

Below is an example of the file structure. Each section within the curly brackets { } represents an appointment property that you will see on the schedule board. The order that your fields appear in the configuration file is the order that they will show in on the schedule board.

- **"id"**: Appointment property and must be one of these valid case-sensitive values: Appointment Property List on page 0 .
- **"label"**: User-defined label that displays for the property.
- **"apptType"**: Appointment type to display the label for. The available appointment types are: "WorkOrder", "Job", and "Technician".

Examples:

- Adding Appointment Description to Mouse-Over Tooltip on page 35
- Adding Cost Code Alias to the Tooltip or Job Appointment Bar on page 35
- Adding Service Call Description with a Label on page 36
- Adding Service Call Description Without a Label on page 36
- Altering the Resource Data Shown in the Timeline View on page 36

Adding Appointment Description to Mouse-Over Tooltip

File Location: C:\Program Files (x86)\Signature\Schedule\Scripts\K2A\SchedulerControl

```
{
  "id": "description",
  "label": "App Desc: ",
  "apptType": [ "ServiceCall", "Job" ]
  }
```

Adding Cost Code Alias to the Tooltip or Job Appointment Bar

File Location: C:\Program Files (x86)\Signature\Schedule\Scripts\K2A\SchedulerControl

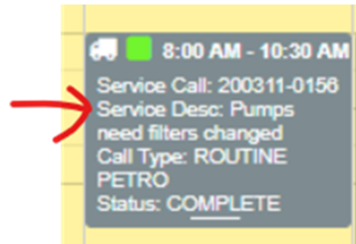
Add this to the tooltipContent.json and eventContent.json:

```
{
  "id": "costCodeAlias",
```

```
  "label": "Cost Code: ",
  "apptType": "Job"
},
```

Adding Service Call Description with a Label

```
{
 "id": "workOrderDescription",
 "label": "Service Desc: ",
 "apptType": [ "ServiceCall" ]
},
```



Adding Service Call Description Without a Label

```
{
 "id": "workOrderDescription",
 "label": "",
 "apptType": [ "ServiceCall", "Job" ]
},
```

Altering the Resource Data Shown in the Timeline View

This example shows you how to set the Resource box to display only the Tech ID and Primary Skill Level in the Schedule Grid when using the Timeline View.

1. Go to the folder where the **schedulerControl.js** file is installed. For a base installation, using the installation defaults, it would be here:
   C:\Program Files (x86)\Signature\Schedule\Scripts\K2A\SchedulerControl
2. Make a copy of the current schedulerControl.js file and paste it into the same folder, for backup purposes.
3. Edit the schedulerControl.js file with Notepad++.
4. Go to this part of the code (possibly at the end of the script):
   resourceColumnData: function (resource, label) {return "<div id='headerLabel-" + resource.key + "' data-resourceID='" + resource.key + "' class='resourceHeaderDetail' style='height: 100% !important;' ondblclick='COMMON.showResourceDetail(" + resource.key + ")'>\ <div class='resourceDataDetail'>" + label + "</div><div class='resourceDataDetail'>" + resource.resource + "</div><div class='resourceDataDetail'>" + resource.skillLevel + " **</div><div class='resourceDataDetail'>" + resource.team + "</div></div>";**
5. Replace this area of the script with this text:
   <div class='resourceDataDetail'>" + resource.resource + "</div><div class='resourceDataDetail'>" + resource.skillLevel + "</div></div>";
6. Save changes to the file.
7. Launch Schedule.
8. CTRL-F5 to update the configuration files.

Example: endPoint List

See http://*yourserver:port*/KEY2ACTServiceLibrary/api/K2AServiceLibraryMeta[7].

- Appointment
- AppointmentHistory
- AppointmentStatus
- Attachment callCreationDate
- Company
- Customer
- CustomerSearch
- Division
- Equipment
- ERPUser
- Job
- JobCostCode
- K2AServiceLibraryMeta
- K2ASettings
- LaborGroup
- LocationContact
- LocationContract
- Location
- Note
- PricingMatrix
- ResourceActivity
- ResourceBranch
- Resource
- ResourceExtension
- ResourceInventorySite
- ResourceReport
- ResourceServiceArea
- ResourceShift
- ResourceSkillSet
- ResourceTeam
- Role
- RolePermission
- Salesperson
- ServiceArea
- ServiceOptions
- SkillLevel
- Subcontractor
- Tasks
- TimeStamp
- TimeZone
- User
- UserRoles
- ValidatedUserDefined
- WorkOrder
- WorkOrderProblem
- WorkOrderReport
- WorkOrderResolution
- WorkOrderType

Example: Appointment Property List

start_date
end_date
number
estimateHours
resourceName
customerName
locationName
costCode
costCodeAlias
actualHours
technicianStatus
appointmentStatus
appointmentPriority
group
skillLevel
completionDate
modifiedDate
modifiedUser
division
affiliate
region
branch
serviceArea
workOrderType
workOrderProblem
workOrderPriority

Example: Additional User-Defined Fields

In addition to the Appointment Property List, any user-defined fields in the SV00301 table are available to include such as:

Service_User_Define_1
Service_User_Define_2
Service_User_Define_3

7 http://yourserverport/

Example: Modified schedulerControl.js

This is what the schedulerControl.js file will look like AFTER you modify it:

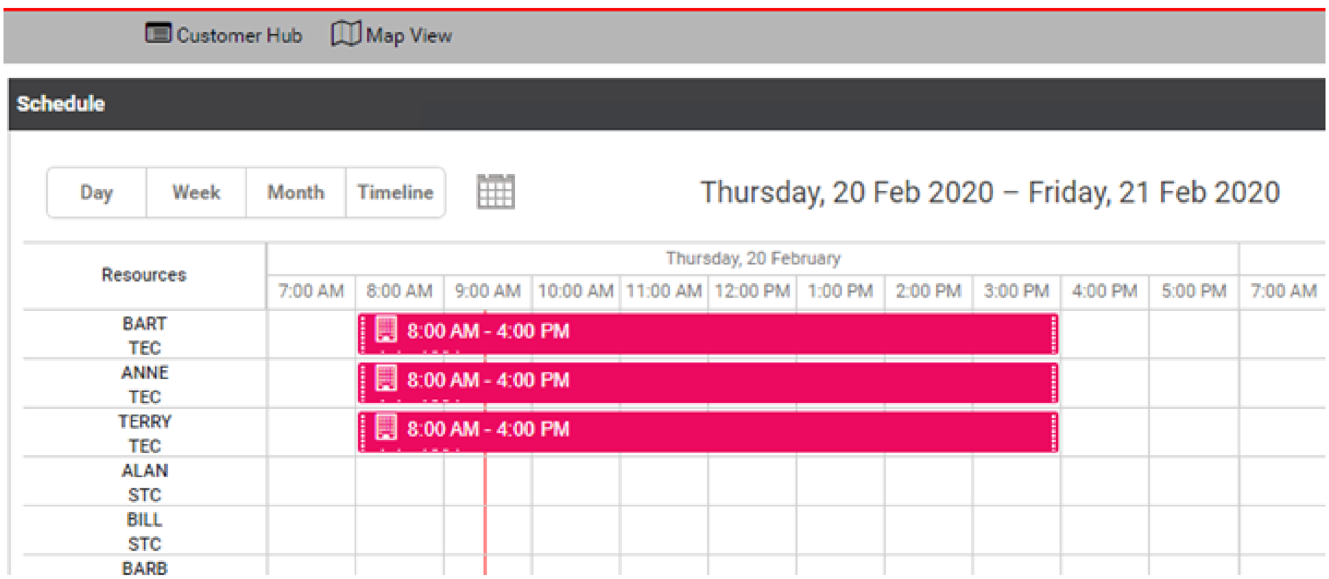
```
            var preScheduledStatus = appt.isScheduled;
            var options = JSON.parse(sessionStorage.getItem("scheduleCompanyOptions"));
            var newStatus = appt.appointmentStatus;
            if (options.scheduleUnassigned != 'empty') {
                newStatus = options.scheduleUnassigned;
            }
            appt.appointmentStatus = newStatus;
            appt.primaryResource = COMMON.getUnassignedResourceID();

            var updateResult = APPOINTMENTDS.updateAppointment(appt);

            if (updateResult.result == true) {
                var data = updateResult.data;
                data.isScheduled = false;
                data.imageIndicator = APPOINTMENTDS.setIconsForUnscheduledAppts(data);
                scheduledApptsDS.remove(data.id);
                unschedApptsDS.add(data);
                unschedApptGrid.sync(unschedApptsDS, { sort: true, filter: true, copy: true });
                UNSCHEDULEDGRID.filterSyncResources(false);
                scheduler.updateView();
                if (UNSCHEDULEDGRID.hasFilterSearch()) {
                    unschedApptGrid.filterByAll();
                }
                COMMON.setUnscheduleGridSort(unschedApptGrid.getSortingState());
                schedulerLayout.cells('c').setText(UNSCHEDULEDGRID.buildCellHeader());
                udpated = true;
            }
            else {
                var data = updateResult.data;
                COMMON.showAlert(data.error);
                updated = false;
            }
            schedulerLayout.cells('b').progressOff();
        },
        resourceColumnData: function (resource, label) {
            return "<div id='headerLabel-" + resource.key + "' data-resourceID='" + resource.key + "' class='resourceHeaderDetail' style='height: 100% !important;' ondblclick='COMMON.showResourceDetail(" + resourc
              <div class='resourceDataDetail'>" + resource.resource + "</div><div class='resourceDataDetail'>" + resource.skillLevel + "</div></div>";

        }
```

Results in Schedule should look like this:



Building Optimization Broker Settings

To set up Building Optimization Broker integration, you will need to enter the information that is provided by WennSoft. The Serial Number and Authorization ID are provided when you set up the FSM Integration in Building Optimization Broker (in the pop-up window after adding the FSM Integration and also in the credentials.csv file that can be downloaded after setting up the FSM Integration). The Building Optimization Broker Settings window allows Schedule to obtain a list of "Requested" service calls from Building Optimization Broker. When the service request is accepted, Schedule updates the Building Optimization Broker service call to an OPEN status. Subsequent updates by the FSM Integration will cause the Service Call record, its default appointment, and all subsequent appointments in the Building

Optimization Broker to become Managed by Signature. This section displays if you have installed Signature Agent for BOB.

1. In Schedule, select the menu ☰ icon, and then select **Settings**.
2. Scroll down to **Building Optimization Broker Settings**.
3. Enter the following information provided by WennSoft:
    - **Serial Number**
    - **Authorization**
    - **User Pool ID**
    - **Client ID**
    - **Integration URL**
4. Select *Save*.

Verify Role Permissions

Only the Administrator Role has Building Optimization permissions to View, Edit, and Delete service requests. You will need to manually set these permissions for all other users who may need them.

1. In Schedule, select the menu ☰ icon, and then go to *Administration* > *User Roles*.
2. Select the Role.
3. In the Role Permissions section, verify the Building Optimization Permissions:
    - **View**: Enables the Service Request button on the Schedule Board for the user and the ability to view the list of Service Requests. Unmarking this option also clears the Edit and Delete checkboxes.
    - **Edit**: Allows users to Accept a service request
    - **Delete**: Allows users to Decline a service request.

Verify Equipment Displays on Service Call

In order for Equipment to be added to a Service Call created from a BOB Service Request, the Equipment field must be marked to display on the Service Call.

1. In Schedule, select the menu ☰ icon, and then go to *Settings* > *Service Call & Appointment Form Fields*.
2. On the Service Call Fields tab, verify that the Equipment checkbox is marked.
3. If this isn't marked, select the checkbox and then select *Save*.

Additional Information

- The Building Optimization Broker service request statuses used with Schedule are stored in the AppSettings.json file found in the \Program Files (x86)\Signature\ServiceLibrary folder.
- A Key Mapping table (NEXTKeyMapping) has been added and includes the following columns: EntityName, SourceIds, NEXTGuid, IsSynched.

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[8].

8 https://docs.key2act.io/display/NewTopics/General+setup

- Manually, when you select the *Refresh Appointments* icon or use the keyboard key combination Ctrl + F5.

IMPORTANT

- If the Service Call and Appointment windows are not displaying the fields that you need to create the service call and/or appointment compared to using Signature Service Management, ask your System Administrator to review the page display settings. For more information, see Displaying Service Call, Appointment, & Equipment Form Fields on page 18.
- 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.

Working with Data

- Locating a Record Using Find[9]
- Exporting Find Data[10]
- Filtering and Sorting Data[11]

Double-booking and Appointment Conflicts

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

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

- **Schedule board**
  You will receive a message indicating that double booking is not allowed for the resource. You will not be able to create the appointment for that resource. See Creating Additional Appointments on page 55 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 on page 42 for information on creating appointments with the wizard.

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

Changing the Schedule Board View

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

The following changes can be made:

- Change the Schedule View on page 41
- Viewing Appointments for Other Days or Months on page 41

9 https://docs.key2act.io/display/SCHED45/Locating+a+Record+Using+Find
10 https://docs.key2act.io/display/SCHED45/Locating+a+Record+Using+Find#LocatingaRecordUsingFind-export-data
11 https://docs.key2act.io/display/SCHED45/Filtering+and+Sorting+Data

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 select a specific date.

Changing Companies

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

Working with Appointments and Service Calls

IMPORTANT

- If the Service Call and Appointment windows are not displaying the fields that you need to create the service call and/or appointment compared to using Signature Service Management, ask your System Administrator to review the page display settings. For more information, see Displaying Service Call, Appointment, & Equipment Form Fields on page 18.
- 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.

A billable service call cannot be created if the customer or location is marked as inactive in Signature. However, if the inactive location is associated with a maintenance contract, you will be able to create a maintenance contract (MC) service call.

Using the Appointment Wizard

The Appointment Wizard helps you to quickly create single or recurring activities or job/service appointments for technician(s), a technician team, or a service area. Appointments created with the Appointment Wizard are assigned a Group ID. You can use the Group ID to view related appointments from the Service Appointment, Service Call, and/or Job Appointment windows. See Working with Related Appointments and/or Resource Activities on page 57 for more information.

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

1. From the schedule board, right-click on a resource, any appointment/activity, or in an empty cell on the schedule board.
2. Select *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 select UNASSIGNED.

     The technician name defaults in if you are accessing the Appointment Wizard from the Schedule Board. If you select a service call or job that the technician does not have access to (based on Global Filtering), the Resource field is cleared so that you can select the appropriate technician. You can edit or add additional technicians from the Resource drop-down.
   - **Technician Team**
     All technicians within the selected team will be assigned. If you are displaying only one team on the Resource grid, that team will default to the Team field in this window.
   - **Service Area**
     All technicians within the service area selected will be assigned.
4. Select the **Appointment Type**:
   - Service Call Appointment on page 42
   - Job Appointment on page 43
   - Technician Activity on page 43

Service Call Appointment

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

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

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

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

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

Job Appointment

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

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

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

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

Technician Activity

1. Select the **Appointment Type** of Technician Activity.
2. Select the **Activity ID**.
3. Select 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. Select the **Appointment Status**.

6. The **Start Date** defaults to today's date and midnight. You can edit the date and time.

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

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

Making Appointment Changes on the Schedule Board

- Change the Time of an Appointment for the Same Day on page 44
    - Click and Drag on page 44
    - Changing the Time on page 44
- Change the Length of an Appointment on page 44

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.

> If an appointment has an unscheduleable status, the date and time cannot be edited. This appointment also cannot be dragged and dropped onto the schedule board with this type of status. Changing the status to a valid value reenables the date/time field for editing.

Change the Time of an Appointment for the Same Day

Click and Drag

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

Changing the Time

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

Change the Length of an Appointment

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

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

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

Viewing/Editing Job Appointment Details

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

1. Double-click the job appointment to view or change the appointment. This can be a scheduled appointment or an unassigned appointment.
2. The Job Appointment Details window displays. You can view and change the appointment information. Additional fields may display depending on Schedule settings.
    - Job - Display only
    - Appointment - Display only
    - Description
    - Cost Code
    - Status
    - Resource
    - Start Date
    - Estimated Hours
    - Priority
    - Completion Date - Can be edited if the appointment status is set to completed.
    - Actual Hours
    - Service_User_Define_1
    - Service_User_Define_2
    - Service_User_Define_3
    - Service_User_Define_7
    - Customer Name
    - Location Name - Billing address
3. You can also select these buttons to complete other tasks.

	Save
	Cancel
	Delete Appointment
	View Job
	View Appointment History - See Viewing Appointment History on page 53
	View/add Appointment Notes - See Working with Notes and Attachments on page 68. If a note exists for this appointment, this icon displays as .
	View/add Attachment - See Working with Notes and Attachments on page 68.

	View Related Appointments - To view the related by appointments by the Group ID, select the drop-down next to the Related Appointments icon and then select *By Group ID* . See Working with Related Appointments and/or Resource Activities on page 57 .

4. Select *Save*.

Context-Sensitive Options for Job Appointments on the Schedule Board

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

- **Set Status**
  Set or update the appointment status.
  - ARRIVED
  - COMPLETE- See Completing Appointments on page 55.
  - DISPATCHED
  - IN ROUTE
  - OPEN
  - PAGED
  - RE-ASSIGN
  - RECEIVED
  - UNASSIGNED
- **Unschedule Appointment**
  The appointment time is set to 12:00 AM. The appointment is moved from the schedule board to the Unscheduled Appointments section. See Unscheduled or unassigned appointments[12].
- **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[13].
- **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[14] 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[15].
- **Add New Appointment Note**
  Adds a note to the appointment. See Working with notes[16].
- **View Customer Details**
  Opens the Customer Hub with the customer/location highlighted. Select the row to expand the row content. See Using the Customer Hub on page 76.
- **View Location Details**
  Opens the Customer Hub with the customer/location highlighted. Select the row to expand the row content. See Using the Customer Hub on page 76.
- **View Bill To Location Details**
  Opens the Customer Hub with the customer/bill to location highlighted. This option displays if the Bill To Location is different than the Service Location. Select the row to expand the row content. See Using the Customer Hub on page 76.

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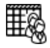
12 https://docs.key2act.io/display/SCHEDULE3/Unscheduled+or+unassigned+appointments
13 https://docs.key2act.io/display/SCHEDULE3/Unscheduled+or+unassigned+appointments
14 https://docs.key2act.io/display/SCHEDULE3/Using+the+appointment+wizard
15 https://docs.key2act.io/display/SCHEDULE3/Create+additional+appointments
16 https://docs.key2act.io/display/SCHEDULE3/Working+with+notes+and+attachments#Workingwithnotesandattachments-notes

Viewing/Editing Service Appointment Details

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

1. Double-click the service appointment . This can be a scheduled or unassigned appointment.
2. The Service Appointment Details window displays. You can view and change the appointment information. Additional fields may display depending on Schedule settings.
   - Service Call - Display only
   - Appointment - Display only
   - Description
   - Status
   - Resource
   - Start Date
   - Estimated Hours
   - Priority
   - Completion Date - Display only
   - Customer Name
   - Location Name
3. You can also select these icons to view additional information.

	Save
	Cancel
	Delete Appointment
	View Service Call - See Viewing/Editing the Service Call on page 51.
	View Service Call Time Stamps - See Viewing Service Call Timestamps on page 53.
	View Appointment History - See Viewing Appointment History on page 53.
	View Service Call Tasks - See Viewing Service Call Tasks on page 54.
	View/add Appointment Notes - See Working with Notes and Attachments on page 68 . If a note exists for this appointment, this icon displays as .
	View/add Attachment - See Working with Notes and Attachments on page 68.
	Notify Customers - See Notifying Customers via Email on page 54.

	View Related Appointments - To view the related by appointments by the Group ID, select the drop-down next to the Related Appointments icon and then select *By Group ID*. See Working with Related Appointments and/or Resource Activities on page 57.
	Work Order Quick Print

4. Select *Save*.

Context-Sensitive Options for Service Appointments on the Schedule Board

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

- **Set Status**
  Set or update the appointment status.
    - ARRIVED
    - COMPLETE- See Completing Appointments on page 55.
    - DISPATCHED
    - IN ROUTE
    - OPEN
    - PAGED
    - RE-ASSIGN
    - RECEIVED
    - UNASSIGNED
- **Unschedule Appointment**
  The appointment time is set to 12:00 AM. The appointment is moved from the schedule board to the Unscheduled Appointments section. See Unscheduled or Unassigned Appointments on page 56.
- **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 on page 56.
- **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 on page 54.
- **Quick Print**
  Opens the Work Order SRS report with the service call details displayed.
- **Print Service Call**
  Prints the service call information.
- **New Service Call - <customer>-<location>**
  Opens the New Service Call window with the Customer Number, Customer Name, Location Name, Division, Bill Customer Name, and the Bill Address Code defaulting from the service appointment. You can also access this by right-clicking on a Customer/location from the Customer Hub.
- **Appointment Wizard**
  Opens the appointment wizard. See Using the Appointment Wizard on page 42.
- **Create New Appointment**
  Opens the New Appointment/Activity window to create a new appointment based on the current appointment. See Creating Additional Appointments on page 55.
- **Add New Appointment Note**
  Adds a note to the appointment. See Working with notes on page 68.

- **View Customer Details**
  Opens the Customer Hub with the customer/location highlighted. Select the row to expand the row content. See Using the Customer Hub on page 76.
- **View Location Details**
  Opens the Customer Hub with the customer/location highlighted. Select the row to expand the row content. See Using the Customer Hub on page 76.
- **View Bill To Location Details**
  Opens the Customer Hub with the customer/bill to location highlighted. This option displays if the Bill To Location is different than the Service Location. Select the row to expand the row content. See Using the Customer Hub on page 76.

Creating a 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.

When creating a new service call and entering the technician, start time, and estimated hours, and thereby creating a scheduled appointment, the appointment status is automatically set to the Scheduled Update status that was set up in Settings > Company Options > Configuration in the Options section. If the value has not been set for the **Scheduled Update**, then the status will be updated to the **Default Status** from the Automatic Status Assignment section in the Configuration window. If both the Schedule Update status field and the Default Status field are not set in Schedule Settings, then the "DEFAULT" displays in the scheduled appointment's status field. See Setting Up Schedule Configuration on page 16.

When creating a maintenance call (MC) service call, and the equipment is not on the contract, a warning message displays indicating the equipment is not on the contract. Select Yes to keep your selections as is or select No to return to the service call window with the current field cleared.
The message displays if:
- The call type is MC, the contract is selected and then the equipment is selected.
- The call type is MC, equipment is selected and then the contract is selected.
- The contract and equipment are selected and then the call type is changed to MC.

A billable service call cannot be created if the customer or location is marked as inactive in Signature. However, if the inactive location is associated with a maintenance contract, you will be able to create a maintenance contract (MC) service call.

To create a new service call:

1. Right-click on:
   - An existing appointment on the Schedule Board and select **New Service Call - <customer name - location>**.
   - From the Customer Hub, right-click on the customer from the list and select **Create New Service Call for <customer name - location>** . Then select the Schedule browser tab to see the New Service Call window.

   If the location is inactive, this option will be **New Service Call (MC Only) for <location>**
2. Complete the following fields, as applicable:
   - **Customer Number/Customer Name**
     Display-only. The customer number and customer name default from the Customer Hub.
   - **Address ID**
     Display-only. The Address ID defaults from the Customer Hub.

- **Location Name**
  Display-only. The location name defaults from the Customer Hub.
- **Service Call**
  Display-only. The service call ID is generated when the service call is saved.
- **Description**
  Enter a brief description of the reason for the call. Use the notepad button to enter multiple pages of notes for the service call. These notes appear on Workorder 1 and Workorder 3.
- **Problem Type**
  Select the problem type.
- **Division** *(required)*
- Use the lookup to select a division for the service call.
- **Salesperson**
  Select the salesperson.
- **Service Call Type**
  Select the service call type. The MCC call type is not available in the lookup window because MCC calls are generated by the system.
- **Priority**
  Select the priority.
- **Customer P.O. Number**
  Enter the customer purchase order number.
- **Contract Number**
  Use the lookup to open the Contract Lookup window. This window displays all open and expired contracts. Expired contracts display the start and end dates in red. You can still select an expired contract for a new service call as Schedule follows the same selection process as Service Management. To select the contract in the lookup window, double-click anywhere on the row or select the *Add* icon to the far right of the contract.

  > To remove the contract from the Contract field on the Service Call window, click the *Remove* icon to the right of the contract.

- **Equipment**
  Select the drop-down to add equipment to the service call. This will also create the default task for the service call as defined in Service Options.
- **Resource**
  The assigned technician displays but you can select another technician.
- **Start Date (and Time)**
  The date and time of the service call. The system date defaults and can be changed.
- **Date/Time Lock**
  When marked, this prevents the call from being rolled forward when Auto-Roll Calls Forward is used. A Date/Time Lock icon is displayed on the service appointment in Schedule when this is turned on. This option is available when the service call has only 1 appointment.
- **Estimated Hours**
  The amount of time it takes to complete the service appointment.
- **Service Call Status**
  This defaults to Open but you can select another status from the drop-down.
- **Bill Customer ID/Bill Address ID**
  Display-only. The bill customer ID and bill address ID default from the Customer Hub.
- **Job Number**
  Use the lookup to open the Job Lookup window. To select a job in the lookup window, double-click anywhere on the row or select the *Add* icon to the far right of the job.
- **Original Service Call**
  If this new service call is based on another service call, you can select the original service call from the drop-down.

- **Caller Information** Use the lookup to select an existing contact or you can add a new contact on-the-fly.
3. Select *Save*.

Viewing/Editing the Service Call

You can easily view the service call from:

- The schedule board by right-clicking a service appointment and then selecting *Open Service Call*.
- The service appointment by selecting the *View Service Call* icon.
- The Customer Hub by:
  - Double-clicking on the service call in the Service Call tab to view the Service Call window on the Schedule tab.
  - Right-clicking on a call in the Service Call tab to view the Service Call window on the Schedule tab. (See Viewing the Service Calls Tab on page 85 for more information.)

Viewing or editing the service call:

1. The following fields display, although not all may be edited:

   > The fields displayed depend on Schedule Settings.

   - **Customer Number**
     Displays the customer ID.
   - **Customer Name**
     Displays the customer name.
   - **Address ID**
     Displays the address ID.
   - **Location Name**
     Displays the location name.
   - **Service Call**
     Displays the service call ID.
   - **BOB Work Order**
     Displays the BOB work order number if the service call originates from Building Optimization Broker.
   - **Description**
     Enter a brief description of the reason for the call.
   - **Problem Type**
     Use the drop-down to select a Problem Type.
   - **Division**
     Use the drop-down to select a Division.
   - **Salesperson**
     Use the drop-down to select a Salesperson
   - **Service Call Type**
     Use the drop-down to select a Service Call Type.
   - **Priority**
     This field is restricted to a single alphanumeric character. 1 is the highest priority; None, the lowest.
   - **Customer P.O. Number**
     Enter an alphanumeric Purchase Order Number. This field may be required depending on your company's settings.
   - **Contract Number**
     You can assign contract numbers to all types of service calls.
   - **Equipment**
     If the service call already has equipment assigned in Service Management, the field in Schedule is display-only. Only the equipment that is active for the customer and location can be selected.

- **Resource**
  The technician that is assigned to the service call.
- **Start Date and Time**
  The date and start time of the service call.
- **Date/Time Lock**
  Prevents the call from being rolled forward when Auto-Roll Calls Forward is used. A *Date/Time Lock* icon is displayed on the service appointment in Schedule when this is turned on. This option is available if the service call has one appointment. If the service call has more than one appointment, this option is not available.
- **Estimated Hours**
  The amount of time it takes to complete the service appointment.
- **Service Call Status**
  Use the drop-down to select the Service Call Status.
- **Bill Customer ID**
  Displays the Bill Customer ID, if applicable to the service call.
- **Bill Address ID**
  Displays the address ID of the Bill Customer, if applicable to the service call.
- **Resolution**
  Use the drop-down to select the Resolution.
- **Job Number**
  Use the drop-down to select a Job Number.
- **Original Service Call**
  Use the drop-down to select an original Service Call Number.
- **Caller Name/Email/Phone**
  Enter a Caller Name, Email, and/or Phone number.
- **USER-DEFINED fields**
  Enter information in the USER-DEFINED fields. The labels are set up in Service Management.
- **Service_User_Define_1**
  Enter information in the Service_User_Define_1 field. The label is set up in Service Management.

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

	Save
	Cancel
	View Service Call Time Stamps - See Viewing Service Call Timestamps on page 53.
	View Appointment History - See Viewing Appointment History on page 53.
	View Service Call Tasks - See Viewing Service Call Tasks on page 54.
	View/add Appointment Notes - See Working with Notes and Attachments on page 68. If a note exists for this appointment, this icon displays as .
	Attachments - See Working with Notes and Attachments on page 68.

	View Related Appointments - To view the related appointments by the Group ID, select the drop-down next to the Related Appointments icon and then select *By Group ID*. See Working with Related Appointments and/or Resource Activities on page 57.

3. Select *Save*.

Viewing Service Call Timestamps

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

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

Viewing Appointment History

If you marked the option to **Keep Appointment History** in the Service Options window in Signature, you can view all changes made to an appointment. The three appointment Actions that are tracked in the window are: Insert, Update, and Delete. The Notify column displays if you have Advanced Communications registered and the Notify icon displays if the customer has been notified of the appointment change.

The following columns display:

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

Viewing Service Call Tasks

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

- Task Code
- Description
- Estimate Hours
- Skill Level
- Equipment ID
- Sublocation
- Task Status
- Completion Date

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*. This icon displays if you are using Advanced Communications.

> For more information about Standard and Advanced Communications, see the Signature Agent 2.4 Guide[17].

Standard Notifications

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

Advanced Communication HTML Notifications

- Appointment Scheduled
- Appointment Changed
- Appointment Completed
- Appointment Cancelled
- Service Call Request Received
- Technician Arrived
- Technician Dispatched

17 https://docs.key2act.io/display/SignatureAgent24/Signature+Agent+2.4

Creating Additional Appointments

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

To create an additional appointment:

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

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

3. The **Start Date** defaults to the date of the original appointment. You can either manually enter the date and time or you can use the date/time picker. See Using the Date/Time Picker on page 56 for more information.
4. Enter any additional information as needed.
5. Select *Save* to add the appointment to the schedule.
6. You can update the appointment by either dragging and dropping or you can double-click the appointment.

Completing Appointments

To complete an appointment you can:

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

When an appointment is completed:

- The **Completion Date** field is enabled. The Completion Time is set automatically to display the time based off the Start Time and the Actual Hours.
- The **Actual Hours** field in the appointment details window is enabled. The Actual Hours field is initially set to the Estimated Hours.
    - If you edit the Actual Hours, the Completion Time is updated.
    - If you edit the Completion Time, the Actual Hours updates, rounded to 2 decimal places.
      For example, if the start time is 7:00 AM and the Estimated Hours are 2, the Completion Time is set to 9:00 AM. If you edit the Actual Hours to 3, the Completion Time updates to 10:00 AM. If you edit the Completion Time to 10:45 AM, the Actual Hours updates to display 3.75 hours.
    - If you are manually completing a future appointment, the Actual Hours field is set to .25.
- After an appointment has been completed, you can no longer drag or resize the appointment on the schedule board. However, you can change the appointment length by opening the appointment details window and changing the value in the **Actual Hours** field.

> If appointments are manually completed in Schedule and/or Signature, the system uses the following logic to calculate the completion date and time as an appointment is set to a completed status.
> - The Completion date/time is defaulted to the appointment start time and date plus the actual hours entered by the technician.
> - If the technician has not entered actual hours, the calculation will use the estimated hours to determine the completion time.

- If there are no estimated hours (or actual hours) entered, 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.
IMPORTANT: If you are manually completing a future appointment, the Actual Hours are set to .25. No calculations are performed.

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 on page 56
- Unscheduling an Appointment on page 56
- Unassigning an Appointment on page 56

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 select *Unschedule*.
- Double-click the appointment and then change the **Time** to **12:00 AM**. You can manually highlight the date time and edit the time or you can use the Date/Time Picker. See Using the Date/Time Picker on page 56 for more information.

Unassigning an Appointment

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

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

Using the Date/Time Picker

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

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

Working with Related Appointments and/or Resource Activities

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

In the Related Appointments window you can do the following:

- View Related Appointments on page 58
- Reschedule a Block of Appointments on page 59
- Split a Block of Appointments on page 60
- Delete a Block of Appointments on page 61

View Related Appointments

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

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

Additional Window Information

Filtering, Sorting, and Rearranging Data

Use your mouse to drag or select the options below:

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

Buttons on this Window

Button	Description
	Reschedule Appointments Mark appointments and then select to reschedule the appointments. See Reschedule a Block of Appointments on page 59.
	Split Appointments Mark appointments and then select to open the Split Appointments window. See Split a Block of Appointments on page 60.
	Delete Appointments Mark appointments and then select to delete the appointment. See Delete a Block of Appointments on page 61.
	Clear All Select to unselect appointments. You would use this to clear any marked appointments. You can also individually clear a marked checkbox by clicking on the marked checkbox to remove the checkmark.
	Clear Filter Select to clear the current search results filters.
	Refresh Reloads the results from the database.
	Export Select to export all data or selected rows. This icon displays for the main Customer Hub list as well as some of the detail tabs (Open Appointments, Service Calls, Equipment, Contacts, Contracts, and Jobs) This button may not be available, depending on the window you are viewing.

Reschedule a Block of Appointments

You may find that you need to reschedule several (or all) appointments that were initially created using the Appointment Wizard on page 42. When multiple appointments are created using the Appointment Wizard, Schedule assigns these appointments a unique Group ID. This allows Schedule to easily identify these as related appointments.

To reschedule a group of appointments:

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

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

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

Split a Block of Appointments

When multiple appointments are created using the Appointment Wizard[18], Schedule assigns these appointments a unique Group ID. This allows Schedule to easily identify these as related appointments.

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

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

To split a group of appointments:

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

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

5. Select the *Split Appointments* icon.
6. In the Split Appointments window, edit any of the following defaulted fields:
   - **Description**
     You can edit the appointment/activity description.
   - **Appointment Status**
     You can update the appointment status for the selected appointments/activities.

18 https://docs.key2act.io/display/SCHEDULE4/Using+the+Appointment+Wizard

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

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

Delete a Block of Appointments

You may find that you need to delete a group of appointments or subset of a group of appointments that were initially created using the Appointment Wizard. When multiple appointments are created using the Appointment Wizard on page 42, Schedule assigns these appointments a unique Group ID. This allows Schedule to easily identify these as related appointments.

To delete appointments from a group:

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

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

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

Processing Service Requests from Building Optimization Broker

Schedule is integrated with the Building Optimization Broker (BOB) Service Request Management module. New role-based security in Schedule administration can enable a Schedule user to view and act upon new Service Requests to either accept or decline those requests. Accepting a request will initiate the new service call form, with information defaulted from the linked Signature customer, location, equipment, and contact (optional).

The number of service requests that have been created in Building Optimization Broker and available to be processed in Schedule is indicated on the Schedule menu bar to the right of the Service Requests button. This number is updated when Schedule is manually refreshed or auto-refreshed, which is based on the Time Period set up in Global Options Settings.

For information on how to set up the integration with Building Optimization broker, see Building Optimization Broker Settings on page 38.

> **Notes**:

- The service requests must have a mapped Customer and Customer Location in Building Optimization Broker in order for the service request to display in Schedule's Service Requests window.
- If the equipment ID entered on the service request but is not mapped, the equipment ID will not display on the service call in Schedule.
- Only service requests with a status of REQUESTED display in this list.
- The BOB WO Number is stored in the SV_Call_Source_ID1 field in the Service Call record.
- SV_Call_Source is set to 120, which indicates the origin of the Service Call is BOB.
- The GUID for this service call is stored in SV_Call_Source_ID2

To process a service request:

1. In Schedule, select *Service Requests* from the menu bar.
2. The Service Requests window opens to display the following service request information that was entered in Building Optimization Broker.
   - **BOB WO**
     The Building Optimization work order number is assigned in Building Optimization Broker.
   - **Customer Name**
     The customer name associated with the service request.
   - **Location Name**
     The location name associated with the service request.
   - **Request Date**
     The date the service request was created.
   - **Request Description**
     The description that was entered on the service request.
   - **Equipment**
     The equipment entered on the service request.
   - **Issue Types**
     The Building Optimization Broker issue types that were entered on the service request. The issue types are added to the service call.
   - **Contact Name/Number/Email**
     This is the contact information that was selected when the service request was created in Building Optimization Broker.
   - **Requestor Name/Number/Email**
     This is the Building Optimization Broker user information who created the service request.

   If the contact information is not provided in the service request, then the requestor name, phone number, and email address default into the respective "caller" fields on the service call.
3. Use the **Filter** option at the bottom of the window to filter the list of service requestions. You can filter by one or more of the following: BOB WO, Customer Name, Location Name, Request Date, Request Description, Equipment, Issue Types, Requestor Name, Requestor Number, Requestor Email, Contact Name, Contact Number, Contact Email, Branch, Affiliate, Region, Phone ID, and/or Contact ID.
4. To *reject* a service request, right-click on a service request and select **Reject Request.** When a service request is rejected in Schedule, the service request is removed from the Service Request window in Schedule and a Declined status update is sent to Building Optimization Broker for the service request.
5. To *accept* a service request, right-click on the service request and select **Accept Request**. When a service request is accepted in Schedule, the New Service Call window opens with some of the information from the service request defaulted in. See Viewing/Editing the Service Call[19] for more information.
6. Once you've saved the service call, the service request is removed from Schedule's Service Request window and a service appointment is created in Schedule.

19 https://docs.key2act.io/pages/viewpage.action?pageId=53641411

The status update selected for the service request is sent to Building Optimization Broker as well as appointment information. Once accepted, the ownership of this service call and all related appointments in Building Optimization Broker are marked “Managed by <FSM Integration name>” and prevents Building Optimization Broker users from removing and/or altering this information. The service request and appointment cannot be edited in Building Optimization Broker.

Buttons on this Window

Button	Description
	Create Filter Select to open the Filter Builder window. Use the Clear button in the Filter Builder window to remove the filter.
	Refresh Reloads the results from the database.
	Column Tool Use the Column Tool to select fields to display from a list of available columns. Mark to display the checkbox, unmark the checkbox to hide. The Affiliate, Region, and Branch columns are not shown by default.

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.

Adding Technicians to the Schedule Board

The technicians that are listed in the Resources section depend on the Branch that you have access to. Marking the checkbox to the left of the technician name in the Resource window will update the Schedule Board and the Unscheduled Appointments section with the technicians' appointments. You can select all the displayed technicians by marking the checkbox to the left of the Search box. When you exit out of Schedule, the technicians that you have marked are saved and when you launch Schedule, they will still be marked.

Filtering Technicians

You have the ability to filter the displayed technicians by selecting Branch, Service Area, and/or Team. When you select any of the filter headings, a drop-down displays with options to select. You can clear any filters by selecting the **Clear Filter** icon.

Searching for Technicians

Use the text box below the Name column header to narrow the list of displayed technicians by enter a few letters. As you are typing the list displays any matching technicians.

Refresh the Resource Section

To refresh the Resource list, select the **Refresh** icon at the top of the section. This will refresh the list back to its last saved state. Additionally, if technicians have been added or inactivated in Signature, the technician list will be updated. These changes may be visible to you, depending upon the currently filtering of the Resources in the Resource panel.

Viewing Resource Details

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

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

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

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

Tabs along the bottom of the window displays additional information:

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

Unscheduling/Unassigning Resources

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

- Right-click the appointment on the schedule board and then select **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 select *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 select *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 select *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 select Unassign All. This will move all appointments for the day to the **Unscheduled Appointments** section.

Identifying Over-allocated Resources

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

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

Generate resource reports

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

1. On the button bar, select *Reports*. The Technician Report window is displayed.
2. Select 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. Select *View Report*. The report is displayed.
6. Select a printing option:
    - Select **Print** to print the report.
    - Select **Page Setup** to change the print properties.
    - Select **Print Preview** to view an onscreen, printable version of the report.

Creating a Resource Activity

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

Create technician activities by using the **New Resource Activity** menu option in the **Resources** 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 select **New Resource Activity**.
2. Complete the fields.
3. Select *Save*.

Viewing/Changing Resource Activities

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

1. Double-click the resource activity to view or change. The Resource Activity Details window is displayed.

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

- Workorder on page 66
    - Five Workorder Formats on page 67
- Daily Schedule Board on page 67
- Resource Schedule on page 67
- Using the Resource Report Wizard on page 67

Workorder

To print the workorder, right-click on a service appointment on the schedule board and select Quick Print or Print Service Call.

> The workorder reports are also printable from Signature. If you map these options to a different report for Schedule, this will also update what is printed from Signature.

- **Quick Print** prints your workorder, in one step, in the format specified during Signature setup. The report prints directly to the printer. To set up the default quick print workorder, see Choosing Service Options[20] in the Signature User Guide.
- **Print Service Call** provides you with the option to print 1 of 5 workorders.

20 https://docs.key2act.io/1805b07/choosing-service-options-101320146.html

Five Workorder Formats

For examples of each workorder, see Service Call Workorders[21] in the Signature Reports Guide.

- **Workorder 1**
  Workorder 1 breaks down key service call information. Technicians can quickly see the date and time a service call was received. This report lists the service call ID and invoice number along with brief service call details and the customer's address. The contact name, email address, and telephone number are also included.
- **Workorder 2**
  Workorder 2 is useful for salespeople. It could be stored in your customer's file. It lists the customer's billing address, service call location, salesperson information, and service call details. The contact name, email address, and telephone number are also included.
- **Workorder 3**
  Workorder 3 is a T-card that combines service call information with customer billing information. The contact name, email address, and telephone number are also included.
- **Workorder 4**
  Workorder 4 includes task detail with the service call information. The contact name, email address, and telephone number are also included.
- **Workorder 5**
  Workorder 5 includes appointment detail with the service call information. The contact name, email address, and telephone number are also included.

Daily Schedule Board

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

1. To view this report, select 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 select *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. Select *Print Resource Schedule* and then select *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 select more than one technician from the **Technician** drop-down.
6. Select *View Report*.

Using the Resource Report Wizard

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

1. Right-click on a resource name from the schedule board.
2. Select *Print Resource Schedule* and then select *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. Select the **Run For** drop-down and select an option for who you want to run the report for: All, Technician, Technician Team, Service Area, or Branch.
5. Depending upon your selection, select one or more technicians, a team, a service area, or a branch.

21 https://docs.key2act.io/display/1805b07/Service+Call+Workorders

6. Select *Run Report*.

Working with Notes and Attachments

Notes and attachments work the same throughout Schedule.

Working with Notes

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

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

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

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

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

View or Change a Note

1. Open the Notes window. See the NOTES TABLE on page 68 above for information on how to open the window from the Schedule Board or Customer Hub.
2. Double-click the note, or select the note and select the *Edit Note* icon. The note displays.
3. Make any changes and select *SAVE*.

Create a Note

1. Open the Note window. (See the NOTES TABLE on page 68 above on how to open the window from the Schedule Board or Customer Hub.)
2. Enter the **Subject**.
3. The author defaults to the current user, however, you can select a different author.
4. Select the **Reminder** indicator if the note serves as a reminder note and select the **Reminder Date**.
5. Select the **Printable?** indicator if the note can be printed.
6. Enter the note text in the box.
7. Select *Save*.

Delete a Note

1. Open the Notes window. See the NOTES TABLE on page 68 above for information on how to open the window from the Schedule Board or Customer Hub.
2. Select the note and select the *Delete* icon.

Working with Attachments

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

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

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

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

View an Attachment

1. Open the Attachments window. See the ATTACHMENTS TABLE on page 70 above for information on how to open the Attachment window from the Schedule Board or Customer Hub.
2. In the Attachments window double-click the attachment to view.

Add an Attachment

1. Open the Attachments window. See the ATTACHMENTS TABLE on page 70 above for information on how to open the Attachment window from the Schedule Board or Customer Hub.
2. In the Attachments window, select *Add New Attachment* icon. The Attachments window is displayed.

3. Enter the **Description**.
4. Edit the **Date**, if needed.
5. Choose *SELECT FILE* and In the Open window, select the file and then select *Open*. Or you can drag and drop the file into the window.
6. Select *UPLOAD FILE*.
7. Close the Attachments window.

Delete an Attachment

1. Open the Attachments window. See the ATTACHMENTS TABLE on page 70 above for information on how to open the Attachment window from the Schedule Board or Customer Hub.
2. Select the attachment and select the *Delete* icon.

Working with the Job Panel

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

Enabling the Job Panel in Settings

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

To enable the Job panel:

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

Using the Job Panel

The Job Panel displays the following information for each job:

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

Searching for a job

Use the Search field at the top of the Job Panel to search for a specific active job. You can search by job number, job description, customer name, location name, division, project manager, or contract type.

Using the context menu

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

The following options are available:

- **View Job Details**
  Opens the Job Details window. This displays details about the job including job number, description, project number, division, estimator, project manager, customer, job address, bill to customer, contract number, contract type, % complete, estimated hours, actual hours, user-defined 1, inactive status, certified payroll status, cost codes, and subcontractors.
- **New Appointment**
  Opens the New Job Appointment window with the current Job Number, Customer Name, and Location Name defaulting in the window. See Viewing/Editing Job Appointment Details on page 45.
- **Appointment Wizard**
  Opens the Appointment Wizard with the Appointment Type defaulting to Job and Job Number defaulting to the current job. See Using the Appointment Wizard on page 42.

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

- **View Customer Details**
  Opens the Customer Hub with the focus on the current customer. See Viewing the Customer Tab on page 78.
- **View Location Details**
  Opens the Customer Hub with the focus on the current customer location. See Viewing the Location Tab on page 79.
- **Print Job Schedule**
  Displays a report that displays the schedule for the current job. See Printing the Job Schedule by Cost Code report on page 72.

Printing the Job Schedule by Cost Code report

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

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

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

To print the job schedule:

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

3. Complete the report header information:

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

Working with Purchase Orders

You can create purchase orders in Schedule for items that need to be purchased while on a service call. The purchase orders are processed in Service Management and in Purchasing. A purchase order created in Schedule needs to be processed in the Mobile Purchase Order Inquiry before a technician can view the purchase order in MobileTech. You can sync purchase orders with the host system at any time. However, after a purchase order has been synced, you can't change it or delete it. If you are not seeing the option to view or add purchase orders, please contact your system administrator. Permissions for purchase orders are set up in User Roles. See Working with Roles on page 12.

> The Schedule Purchase Orders feature is available with Signature 2022 (18.05b07) or higher. Purchase orders created in Schedule and MobileTech do not include taxes. Any applicable taxes are added when the purchase order is processed in Service Management.

Viewing Purchase Orders

The columns can be reordered by selecting the column header and dragging it to your desired location. You can sort by selecting any column header.

To view existing purchase orders:

1. From the schedule board, right-click on an appointment and select **View Purchase Orders**. You can also access this window by right-clicking on a service appointment, selecting **View Service Call**, and selecting the **View Purchase Orders** icon from the button bar.
2. In the Purchase Orders window, the service call ID or job number is displayed in the title bar.
3. The following columns show the following information.
    - **Processed**: If marked, this indicates that the purchase order has been processed and cannot be edited or deleted in Schedule.
    - **Origin**: Indicates where the purchase order was created: Schedule, MobileTech, GP.
    - **PO Number**: The purchase order number.
    - **Vendor**: The vendor on the purchase order.
    - **Item**: The item number.
    - **Description**: The item description.

- **Site**: The site where the item is located.
- **U of M**: The unit of measure selected for the item.
- **Quantity**: The quantity of the item.
- **Unit Cost**: The unit cost for the item.
- **Extended Cost**: The extended cost of the item (quantity x unit cost).
- **Date**: The date the purchase order line was created.
- **User**: The user who created the purchase order line.
- **Line**: The purchase order line number on the purchase order.

4. Select *Save*.

Creating a New Purchase Order

1. To add a new purchase order line, select the **New Purchase Order** button in the Purchase Order window.
2. In the Purchase Order Line window, the customer number, name, address ID, location name, and job or service call ID are read-only and cannot be edited.
3. Enter or select the following information (* indicates a required field):
    - ***PO Number**: The purchase order number. Depending on the setup options for generating purchase order numbers and purchase order prefixes, a purchase order number might be displayed, or you can enter a purchase order number.
    - **Date**: The date of the purchase. The default date is the current date, but you can change it.
    - **Vendor**: Select the vendor.
    - ***Item**: Select an existing inventory item number or enter a new one.
      If the item is new when you tab off the field, the Item Information window displays where you have the option to enter the item description. Select Continue to return to the Purchase Order Line window. The item is created as a non-inventory item for the purchase order when you sync the purchase order.
    - ***Site**: Select a site where the item should be assigned.
    - ***Unit of Measure**: Select a unit of measure that best represents the item that is being purchased. If a default unit of measure is designated in the setup, the default unit of measure is displayed, but you can change it.
    - ***Cost Code**: The cost code depends on the type of appointment you are adding the purchase order to:
        - **Service appointment**: The cost code pertaining to the purchased item. A default cost code is displayed, but you can change it.
        - **Job appointment**: The non-labor cost code pertaining to the purchased item. If one non-labor job cost code exists on the job appointment, the job cost code will auto-populate. The field is blank and you can select the job cost code from the drop-down list if more than one non-labor job cost code (or none) exists on the job appointment.
    - ***Quantity**: The number of items being purchased must be 1 or greater.
    - ***Unit Cost**: The cost of each item that is purchased. The default amount is displayed, but you can change it.
    - **Extended Cost**: This amount is calculated automatically, based on the cost and the quantity (Cost x Quantity = Extended Cost).
4. Select *Save*.

Add, Edit, or Delete a Purchase Order Line

You can change purchase order lines and create additional purchase order lines after you save a purchase order, but before it is processed in Service Management.

- To add lines to a purchase order, right-click on the purchase order line and select *New Purchase Order Line*. Information is displayed based on the original purchase order. Enter information in the Purchase Order Line window, as needed, and then select *Save*.
- To change a purchase order line, right-click on the purchase order line, select *Edit Purchase Order Line*, and make changes. Select *Save*.

- To remove a purchase order line that was created before it is processed in Service Management, right-click on the purchase order line and select Delete Purchase Order Line. Select Yes to verify you want to delete the line.

> A purchase order or purchase order lines cannot be edited or deleted after the purchase order has been processed in Service Management.

Processing Purchase Orders in Service Management

A purchase order that is entered in MobileTech or Schedule must be reviewed, committed, and processed in Service Management and Microsoft Dynamics GP Purchasing before costs that are associated with the purchase order can be processed in the system. The user who is processing these purchase orders must be a Microsoft Dynamics GP Full User.

> To allow users in MobileTech or Schedule to quickly work and provide information to customers in the field, purchase orders for service invoices and field invoices do not include taxes unless the invoices have been received in the Purchasing module of Microsoft Dynamics GP.

- Process Purchase Orders on page 75
- Post Purchase Orders in Microsoft Dynamics GP on page 76

Process Purchase Orders

After a purchase order has been synced with the host system, you can view and process the purchase order in Service Management. Costs that are associated with a purchase order are displayed in Service Management as committed costs on the service invoice. You can use the zoom functionality to display the appropriate setup window. For example, zooming on the service call number will open the Service Call window.

To view and process purchase orders that were sent from MobileTech or Schedule:

1. In Microsoft Dynamics GP, select *Inquiry* > *Service Management* > *Mobile Purchase Order Inquiry*.
2. The Mobile Purchase Order window displays the following information that was entered on the purchase order:
    - **Service Call/Job Number**
      Displays the service call ID or job number.
    - **Appointment**
      Displays the appointment ID.
    - **Technician**
      Displays the technician.
    - **PO Number**
      Displays the purchase order number.
    - **Line Number**
      Displays the line number of the item entered on the purchase order.
    - **Date**
      Displays the date the purchase order was created in MobileTech or Schedule.
    - **eConnect Error**
      If an error occurs, the eConnect Error number is displayed in the purchase order row as a hyperlink that you can select to view the error message.
    - **Vendor/Vendor Name**
      Displays the Vendor entered on the purchase order.
    - **U of M**
      Displays the item's unit of measure.
    - **Item Number/Item Description**
      Displays the item number and description.

- **Quantity**
  Displays the quantity of the item.
- **Unit Cost**
  Displays the unit cost of the item.
- **Cost Code**
  Displays the cost code. (service appointments).
- **Job Cost Code**
  Displays the Job cost code (job appointments).
- **Site ID**
  Displays the Site ID.
- **Product Indicator**
  Displays Job Cost or Service, depending on the origin of the purchase order (job or service call).
- **Billing Amount**
  Displays the billing amount.
- **Invoiced**
  Indicates if the purchase order was invoiced.

3. You can select *Print* to print the Mobile Purchase Order report, which displays information about the purchase orders that need to be processed.
4. Select the transactions from MobileTech to process and select *Process*.
5. Select *Redisplay* to update the list of purchase orders that were submitted by technicians.

Post Purchase Orders in Microsoft Dynamics GP

1. To post purchase order transactions in Microsoft Dynamics GP that originated from MobileTech or Schedule, in Microsoft Dynamics GP, select *Transactions* > *Purchasing* > *Purchase Order Entry*. The Purchase Order Entry window is displayed.
2. In the **PO Number** field, select a purchase order.
3. View and change other information as needed. For example, you can add freight, tax, and miscellaneous amounts to the purchase order.

   > A purchases tax schedule for a company must be set up in the Company Setup window *(Microsoft Dynamics GP* > *Tools* > *Setup* > *Company* > *Company)* before you can process taxes for purchase order receipts.

4. Select *Commit*. Purchase orders that are committed are available in MobileTech so that technicians can enter purchase order receipts for inventory items.

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 on page 77
- Viewing Customer Information on page 77
- Viewing Detailed Customer Information on page 77
- Creating Customers, Locations, and Service Calls on page 78
- Working with Data on page 78

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:

- Select the *Customer Hub* icon at the top of Schedule.
- On the schedule board, right-click on the appointment and select *View Customer Details* or *View Location Details*.
- In the **Unscheduled Appointments** section of Schedule, right-click an appointment and select *View Customer Details* or *View Location Details*.

Viewing Customer Information

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

> The column order listed below is the default order. You can filter, sort, and rearrange the data in this window. Filtering, sorting, and rearranging data on page 78 for more information.

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

Viewing Detailed Customer Information

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

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

- **Customer**
  Displays the customer's details. See Viewing the Customer Tab on page 78.
- **Location**
  Display's the customer location's details. See Viewing the Location Tab on page 79.
- **Open Appointments**
  Displays any open appointments for the customer. See Viewing the Open Appointments Tab on page 84.
- **Service Calls**
  Displays the customer location's service calls. See Viewing the Service Calls Tab on page 85.
- **Equipment**
  Displays the customer's equipment. See Viewing the Equipment Tab on page 81.

- **Contacts**
  Displays the customer's contacts. See Working with the Contacts Tab on page 86.
- **Contracts**
  Displays the customer's contracts. See Viewing the Contracts Tab on page 89.
- **Jobs**
  Displays the customer's jobs. See Viewing the Jobs Tab on page 90.

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 on page 79.
- **Location**
  See Creating a New Location on page 80.
- **Service Call**
  See Creating a Service Call on page 49.

Working with Data

- Locating a Record Using Find on page 8
- Exporting Find Data on page 9
- Filtering and Sorting Data on page 7

Working with Customers

- Viewing the Customer Tab on page 78
- Creating a New Customer on page 79

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 on page 79.

Viewing Customer Details

1. To view the customer details, select a customer in the Customer Hub.
2. The customer information displays on the **Customer** tab.
3. You can view the display-only customer information:

   - Customer Number
   - Customer Name
   - Address 1
   - Address 2
   - City
   - State
   - Postal Code
   - Contact Person 1
   - Phone 1
   - Contact Person 2
   - Phone 2
   - Salesperson
   - Hold Status
   - Inactive Status
   - Priority
   - Receivables Status
   - User_Define_1a

4. You can view and/or add customer notes and attachments. See Working with notes and attachments[22].

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. Select **Create New Customer**.
3. In the New Customer/Location window, enter the customer details, required fields are indicated with an * asterisk.
   - Customer ID
   - Name *
   - Location ID *
   - Address 1
   - Address 2
   - City
   - State
   - Zip Code
   - Contact Person
   - Phone 1
   - Phone 2
   - Customer Class
   - Primary Technician
   - Labor Group *
   - Price Matrix *
   - Division *
   - Affiliate *
   - Region *
   - Branch *

   > Selecting the Customer Class will auto-populate the Primary Technician, Labor Group, Price Matrix, and/or Division as defined in Signature for the Service Class associated with the Customer Class.
4. Select *Save*.

Working with Locations

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 on page 80.

> Editing locations must be done in Service Management.

Viewing Location Details

1. To view the location details, select a customer in the Customer Hub.
2. Select the **Location** tab.
3. The following display-only customer location information is available:
   - Customer Number
   - Address ID
   - Location Name
   - Hold
   - Inactive
   - Priority

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- Address 1
- Address 2
- Address 3
- City
- State
- Postal Code
- Contact Person 1
- Contact Person 2
- Phone 2
- Salesperson
- Division
- Affiliate
- Region
- Branch
- User_Define_1a
- User_Define_2a
- User_Define_3a
- User_Define_4a
- User_Define_5a
- User_Define_6a

4. A map displays the customer's location.

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

5. You can view and/or add location notes and attachments. See Working with notes and attachments[23].

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. Select **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. Select *Save*.

Working with Equipment

From the Equipment tab, you can view, edit, or create equipment and equipment component records at a customer's service location. You are not able to delete equipment records in the Customer Hub.

> **Notes**
>
> - The ability to perform these actions is dependent on the user role permissions assigned to your user role by your administrator.
> - If the Equipment window is not displaying the fields that you need to create the equipment compared to using Signature Service Management, ask your System Administrator to review the page display settings. For more information, see Displaying Service Call, Appointment, & Equipment Form Fields on page 18.

- Viewing the Equipment Tab on page 81
- Creating New Equipment or Component Equipment on page 82
- Editing Equipment and Component Equipment on page 83

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Viewing the Equipment Tab

You can view the customer location's equipment.

> **Notes**
>
> - The ability to perform these actions is dependent on the user role permissions assigned to your user role by your administrator.
> - If the Equipment window is not displaying the fields that you need to create the equipment compared to using Signature Service Management, ask your System Administrator to review the page display settings. For more information, see Displaying Service Call, Appointment, & Equipment Form Fields on page 18.

- Viewing Equipment on page 81
- Available Data Columns on page 81

Viewing Equipment

1. To view the equipment for a customer location, select a customer in the Customer Hub.
2. In the details section of the Customer Hub, select the **Equipment** tab.
3. Right-click on an equipment name and then select from the following:
    - **Add Equipment** - Opens the Equipment window. See Creating New Equipment or Component Equipment on page 82.
    - **Edit Equipment** - Opens the Equipment window. See Editing Equipment and Component Equipment on page 83.
    - **Add Note** - Opens the Service Call note window. See Working with notes and attachments[24].
    - **Add Attachment** - Opens the Service Call attachment window. See Working with notes and attachments[25].
    - **View Note** - Opens the Notes/Attachments window. See Working with notes and attachments[26]. (Displays if a note exists.)
    - **View Attachment** - Opens the Notes/Attachments window. See Working with notes and attachments[27]. (Displays if an attachment exists.)

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
- Component
- Serial Number
- Barcode
- Installed By
- Installed Date
- Warranty Exp Date
- Ext Warranty Expiration Date
- Building ID
- Building Room

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- Master Equipment ID
- Component Quantity
- Contract
- Equipment Type
- Manufacturer
- Model Number
- Suspended MCC
- Inactive/Retired
- User_Defined_1a

Creating New Equipment or Component Equipment

You can create a new equipment record or component equipment record for a customer location in the Customer Hub window. This information is synced to Service Management. As with Service Management, the only required field for an equipment record is the Equipment ID.

> **Notes**
>
> - The ability to perform these actions is dependent on the user role permissions assigned to your user role by your administrator.
> - If the Equipment window is not displaying the fields that you need to create the equipment compared to using Signature Service Management, ask your System Administrator to review the page display settings. For more information, see Displaying Service Call, Appointment, & Equipment Form Fields on page 18.

To add an equipment record:

1. To view the equipment for a customer location, select a customer in the Customer Hub.
2. In the details section of the Customer Hub, select the **Equipment** tab.
3. Right-click on an equipment name and then select **Add Equipment**.
4. In the Equipment window, complete the fields, as necessary.
    - **Component**
        - **No**: Select No if the equipment record is not a component of a master equipment record.
        - **Yes**: Select Yes if the equipment record is a component of a master equipment record.
    - **Equipment ID/Component ID**
      If you chose to auto-generate equipment IDs during setup, the ID will auto-populate. The label for this field displays based on if you are creating an equipment record or a component record.
    - **Master Equipment ID**
      If you are creating a component equipment record, select the master equipment record.
    - **Description**
      Enter a description of the equipment.
    - **Equipment Type**
      Use the drop-down or manually enter an equipment type. Information from the equipment type template appears on the equipment record.
    - **Manufacturer ID, Model Number, Serial Number**
      Some information in these fields may default from the equipment type template.
    - **Bar Code ID**
      Enter the bar code ID.
    - **Building ID**
      Enter the building ID.
    - **Building Room**
    - Enter the room where the equipment is located.
    - **Sub Location ID**
      To help technicians complete service calls more efficiently, you can direct them to a sublocation where the equipment is located.

- **Installed Date**
  Enter the installation date.
- **Installed By**
  Identify who installed the piece of equipment. You can use the lookup or add on-the-fly.
- **Warranty Expires**
  This date is automatically calculated based on the warranty days entered for the equipment type, if applicable, once the Installation Date is entered or you can enter the month, day, and year of the warranty's expiration.
- **Extended Warranty**
  The Extended Warranty defaults from the equipment type, if applicable, or you can use the lookup to select a different extended warranty or you can add-on-the fly.
- **Extended Warranty Expires**
  This date is automatically calculated based on the extended warranty days entered for the equipment type, if applicable after the Installation Date is entered or you can enter the month, day, and year of the extended warranty's expiration.
- **Optimal Charge (lbs)**
  Enter the optimal refrigerant charge necessary to maintain safe cooling levels. This is often a manufacturer's initial value and may default from the equipment record.
- **Refrigerant Type ID**
  Select the type of refrigerant that is being used. Depending on the equipment, this can be one of several primary types. See the National Refrigeration Safety Code catalog for more information. This information can also be entered in Service Management. For more information, see the Service Management documentation.
- **Refrigerant Equipment Type**
  Use the drop-down to select the refrigerant equipment type. The pounds indicate the amount of refrigerant the equipment can contain.
    - 0-Not Applicable (default)
    - 1 - Commercial Refrigeration 50-500 pounds
    - 2 - Commercial Refrigeration > 500 pounds
    - 3 - Industrial Process Refrigeration 50-500 pounds
    - 4 - Industrial Process Refrigeration >500 pounds
    - 5 - Comfort Cooling > 50 pounds
    - 6 - Mid-Size Appliance 5-40 pounds (leak rate not required)
- User Defined
  Enter additional information. The User Defined field label is set up in Service Management.

5. Select *Save*.

Editing Equipment and Component Equipment

You can edit an equipment record, including component equipment, for a customer location in the Customer Hub window. This information is synced to Service Management. As with Service Management, the only required field for an equipment record is the Equipment ID.

> **Notes**
>
> - The ability to perform these actions is dependent on the user role permissions assigned to your user role by your administrator.
> - If the Equipment window is not displaying the fields that you need to create the equipment compared to using Signature Service Management, ask your System Administrator to review the page display settings. For more information, see Displaying Service Call, Appointment, & Equipment Form Fields on page 18.

To edit an equipment record:

1. To view the equipment for a customer location, select a customer in the Customer Hub.
2. In the details section of the Customer Hub, select the **Equipment** tab.
3. Right-click on an equipment name and then select *Edit Equipment*.
4. In the Equipment window, you can edit any of the equipment fields except for the Equipment/Component ID. For a description of the fields, see Creating New Equipment or Component Equipment on page 82.
5. Select *Save***.**

Viewing the Open Appointments Tab

You can view the open appointments for the customer location.

Viewing Open Appointments

1. To view the open appointment(s) for a customer, select a customer in the Customer Hub.
2. In the details section of the Customer Hub, select the **Open Appointments** tab.
3. In this tab view, you can:
   a. Double-click an appointment to open the appointment on the Schedule Board. See Viewing/Editing Service Appointment Details on page 47 or Viewing/Editing Job Appointment Details on page 45.
   b. Right-click a Service Call appointment and then select from the following:
      - **Add Note** - Opens the Service Call note window. See Working with Notes and Attachments on page 68.
      - **View Note** - Opens the Notes/Attachments window. See Working with notes and attachments[28]. (Displays if a note exists.)
      - **Open Service Call** - Opens the Service Call window on the Schedule tab. See Viewing/Editing the Service Call on page 51.
      - **Open Appointment** - Opens the Service Appointment window on the Schedule tab. See Viewing/Editing Service Appointment Details on page 47.
      - **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[29].
      - **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[30].
   a. Right-click a Job appointment and then select from the following:
      - **Add Note** - Opens the Job Appointment note window. See Working with Notes and Attachments on page 68.
      - **View Note** - Opens the Notes/Attachments window. See Working with notes and attachments[31]. (Displays if a note exists.)
      - **View Job Details** - Opens a display-only view of the job details with tabs for the cost codes and subcontractors.
      - **Open Appointment** - Opens the Job Appointment window. See Viewing/Editing Job Appointment Details on page 45.

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- **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[32].
- **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[33].

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 Service Call on page 49.

- Viewing Service Calls on page 85
- Available Data Columns on page 86

Viewing Service Calls

1. To view the service call(s) for a customer location, select a customer in the Customer Hub.
2. In the details section of the Customer Hub, select the **Service Call** tab.
3. In this tab, you can:
    - Double-click the service call to open the service call window in the Schedule tab. See Viewing/Editing the Service Call on page 51.
    - Right-click a service call and select from the following:
        - **Add Note** - Opens the Service Call note window. See Working with Notes and Attachments on page 68.
        - **Add Attachment** - Opens the Service Call attachment window. See Working with Notes and Attachments on page 68.
        - **View Notes** - Opens the Notes/Attachments window. See Working with Notes and Attachments on page 68. (Displays if a note exists.)

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- **View Attachments** - Opens the Notes/Attachments window. See Working with Notes and Attachments on page 68. (Displays if an attachment exists.)
- **Open Service Call** - Opens the Service Call window on the Schedule tab. See Viewing/Editing the Service Call on page 51.
- **New Appointment** - Opens the New Appointment window on the Schedule tab. See Creating Additional Appointments on page 55.
- **Appointment Wizard** - Opens the Appointment Wizard on the Schedule tab. See Using the Appointment Wizard on page 42.

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
- Original Work Order
- Job Number
- Resolution
- Modified Date
- Bill Customer
- Bill Location
- Modified User
- Priority UDF Label
- UDF 1 Label
- UDF 2 Label
- UDF 3 Label
- UDF 4 Label
- Opened Date
- Service Call Source
- Service Call Source ID 1
- Service Call Source ID 2

Working with the Contacts Tab

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

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

Viewing Location Contacts

To view the location contacts:

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

Attaching a Contact

You can attach an existing Master Contact to a location. If the contact isn't found in the list of Master Contacts, you can add the contact. See Adding a contact on page 87.

To attach a contact:

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

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

Adding a Contact

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

To add a location contact:

1. Select a customer in the Customer Hub.
2. In the details section of the Customer Hub, select the **Contacts** tab.
3. Right-click on any contact and select *Add Contact*.
4. In the Contact Lookup window, enter the name of the contact (partial or full) to verify the Master Contact does not currently exist. If the contact does exist as a master contact, you can attach the contact to the location. See Attaching a contact on page 87 for more information.
5. Select the *Add* icon to open the Contact window.
6. Complete the following fields:

- **Name** (required)
  Enter the first and last name.
- **Local/Agency**
  Select the contact type.
- **Organization**
  Enter the name of the organization.
- **Role**
  Select the contact's role.
- **Address 1, Address 2, City, State, Postal Code**
  The address information defaults in from the Location however you can edit this as needed.
- **Primary Phone Number**
  Enter the primary phone number.
- **Phone Type**
  Select the phone type for the primary phone number
- **Email, Pin Number, Customer Portal Report Folder**
  Provide the login information and application data if this contact is a Customer Portal user.
- **Quick Note**
  Use the Quick Note window to enter notes and other information. Unlike attached notes created with the notepad button, a quick note is visible on the Contacts tab.

7. Select *Save*.

Editing a Contact

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

To edit a location contact:

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

iii. You can delete a phone number by clicking on the *Delete* icon. Select *Save*. You can select the *Undo* icon directly above the Delete icon column to restore deleted phone numbers.

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

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

5. Select *Save*.

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

Detaching a Contact

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

To detach a location contact:

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

Available Data Columns

The default columns that display are:

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

Viewing the Contracts Tab

You can view the customer location contracts.

Viewing Contracts

1. To view the location contracts, select a customer in the Customer Hub.
2. In the details section of the Customer Hub, select the **Contracts** tab.
3. Right-click a contract and select from the following:
    - **Add Note** - Opens the Service Management note window. See Working with notes and attachments[34].
    - **Add Attachment** - Opens the Service Call attachment window. See Working with notes and attachments[35].

    > If you have two contracts with the same contract number, open or historical, and add an attachment to either contract, the attachment(s) will display on both contracts.

    - **View Note** - Opens the Notes/Attachments window. See Working with notes and attachments[36]. (Displays if a note exists.)
    - **View Attachment** - Opens the Notes/Attachments window. See Working with notes and attachments[37]. (Displays if an attachment exists.)

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

Viewing the Jobs Tab

Jobs can be viewed in the Customer Hub.

- Viewing Jobs on page 90
- Available Data Columns on page 91

Viewing Jobs

1. To view the job(s) for a customer location, select a customer in the Customer Hub.
2. In the details section of the Customer Hub, select the **Jobs** tab.
3. Right-click a job and select from the following:

34 https://docs.key2act.io/display/NewTopics/Working+with+notes+and+attachments
35 https://docs.key2act.io/display/NewTopics/Working+with+notes+and+attachments
36 https://docs.key2act.io/display/NewTopics/Working+with+notes+and+attachments
37 https://docs.key2act.io/display/NewTopics/Working+with+notes+and+attachments

- **Add Note** - Opens the Job note window. See Working with Notes and Attachments[38].
- **Add Attachment** - Opens the Job attachment window. See Working with Notes and Attachments[39].
- **View Notes** - Opens the Notes/Attachments window. See Working with Notes and Attachments[40]. (Displays if a note exists.)
- **View Attachments** - Opens the Notes/Attachments window. See Working with Notes and Attachments[41]. (Displays if an attachment exists.)
- **View Job Details** - Opens a display-only view of the job details with tabs for the cost codes and subcontractors.
- **New Appointment** - Opens the New Appointment window on the Schedule tab. See Creating Additional Appointments[42].
- **Appointment Wizard** - Opens the Appointment Wizard on the Schedule tab. See Using the Appointment Wizard[43].

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.
- 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 any of the following columns:

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

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 on page 21 for more information.

38 https://docs.key2act.io/display/SCHED47/Working+with+Notes+and+Attachments
39 https://docs.key2act.io/display/SCHED47/Working+with+Notes+and+Attachments
40 https://docs.key2act.io/display/SCHED47/Working+with+Notes+and+Attachments
41 https://docs.key2act.io/display/SCHED47/Working+with+Notes+and+Attachments
42 https://docs.key2act.io/display/SCHED47/Creating+Additional+Appointments
43 https://docs.key2act.io/display/SCHED47/Using+the+Appointment+Wizard

If you are receiving an error message when using the Google Maps API with MapView, see Google Maps Error Messages on page 97 for additional Status information.

Viewing Appointments on the Map

Access the Map and Route Resources window

1. To open the Map and Route Resources window, select the *Map View* icon.
2. The Map and Route Resources window opens and displays icons for on the map for all job and service appointments, scheduled and unscheduled, as well as unassigned appointments.
3. The icons that display for the job/service appointments as well as unassigned and unscheduled appointments depend on the mapping options on page 22 in Configuration settings.
   The default icons are:
   - - Resource
   - - Scheduled appointment
   - - Unscheduled appointment
   - - Unassigned appointment
4. To view the traffic situation, mark *Show Traffic*.

See also:

- Viewing Appointment Details on page 92
- Viewing and Optimizing Routes on page 93
- Viewing Unscheduled/Unassigned Appointments on the Map on page 93
- Using Drawing Tools on the Map on page 94

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. Select *Open Appointment*.

See also:

- Viewing Appointments on the Map on page 92
- Viewing and Optimizing Routes on page 93
- Viewing Unscheduled/Unassigned Appointments on the Map on page 93
- Using Drawing Tools on the Map on page 94

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

   > See Using Drawing Tools on the Map on page 94 to learn how to draw a shape on the map to include those appointments in the technician's route.

4. In this window, you have the option to:
   - Manually re-arranging the route items by dragging and dropping in the list.
   - - Add the start address as the end location.
   - - Add a lunch break and time in minutes.
   - - Remove selected item.
   - Process Route
     - - Route Current List - Select 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 - Select 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 do not save any changes, nothing will change for the resource schedule.

See also:

- Viewing Appointments on the Map on page 92
- Viewing Appointment Details on page 92
- Viewing Unscheduled/Unassigned Appointments on the Map on page 93
- Using Drawing Tools on the Map on page 94

Viewing Unscheduled/Unassigned Appointments on the Map

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

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

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

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

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

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

See also:

- Viewing Appointments on the Map on page 92
- Viewing Appointment Details on page 92
- Viewing and Optimizing Routes on page 93
- Using Drawing Tools on the Map on page 94

Using Drawing Tools on the Map

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

- Using Google Maps on page 94
- Using Bing Maps on page 95
    - Editing a shape on page 95

Using Google Maps

1. Select the resource by clicking the *Select Resource for Routing* drop-down and selecting the technician.
2. Select the Google Maps drawing tool that you'd like to use. You can select between a circle, a polygon, or a square . The hand icon may be used to close the polygon shape, although you can also complete the polygon shape by clicking on the starting point.
3. Click the starting point on the map.
    - Circle - The starting point is the center of the circle. Click again on the map to define the outer edge.
    - Polygon - You can click more than one time on the map to draw your shape. Double-click on the final point of the shape.
    - Square - The starting point is the top left corner or the bottom right corner, depending on the direction that you move your mouse. Click on the map a second time to determine the outer edge of the shape.
4. After defining the shape with the final mouse click, you are prompted to add the unscheduled appointments to the technician's route. Appointments that are already scheduled are not added to the list.
5. You can edit the technician's route by dragging the appointments or by using the icons at the top of the route list. See Viewing and Optimizing Routes on page 93.

Using Bing Maps

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

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

8. You can edit the technician's route by dragging the appointments or by using the icons at the top of the route list. See Viewing and Optimizing Routes on page 93.

Editing a shape

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

See also:

- Viewing Appointments on the Map on page 92
- Viewing Appointment Details on page 92
- Viewing and Optimizing Routes on page 93
- Viewing Unscheduled/Unassigned Appointments on the Map on page 93

Resetting Technician Starting Locations

In order to reset the technician's vehicle location to the same starting point each day for routing purposes, at the beginning of the work day, the dispatcher can reset all technicans to their starting home location. The technician starting locations are set up on the **Resource Options** tab in Administration Setup. See Setting up resource options[44][45] for more information.

To obtain technician starting locations:

1. In Schedule, select the **Hamburger menu** icon.
2. Select **Geocoding**.
3. On the far left side of the window, select *Reset Resource Locations*.

> Administrators also have the ability to reset the starting locations as described in Processing Requests on page 14.

44 https://docs.key2act.io/display/SCHED45/Setting+up+resource+options
45 https://docs.key2act.io/display/SCHED45/Setting+up+resource+options

Troubleshooting

Topics within this section:

Appointment Start Date Field is Missing

On the appointment window, the Start Date label is displayed but the Start Date field is missing. This may be that the system is not reading the Unschedulable Status list. To fix this, you can access General Settings and save the Unschedulable Status to allow the system to read the list.

1. In Schedule, select the menu icon and then select *General Settings*.
2. In **Company Options** under Schedule Configuration, scroll down to Automatic Status Assignment.
3. In the **Unschedulable Status** list field select the status(es) that should not be able to be scheduled, or select the top blank item if all statuses are schedulable.
4. Select *Save*.

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, select the menu icon.
2. Select *About*.
3. Select *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, select the menu icon.
2. Select *About*.
3. Select *Clear Customer Hub Cache*.

Geocode was Not Successful for <Service Call>

If you receive an error message on the Map and Route Resources window that displays "Geocode was not successful for: <service call ID>", this means that the latitude and/or longitude information is not entered for the associated appointment address for the service call. You will need to run the Geocoding Fetch Coordinates process to update your locations with valid latitude/longitude. This process only updates those records where the values are zero, existing latitude and longitude information will not be overwritten. See Setting up Geocoding for Service Locations on page 23 for more information.

Google Maps Error Messages

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

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

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

  See the Google Maps FAQ (external link)[46] to learn how to fix this.
- **OVER_QUERY_LIMIT** indicates that you are over your quota.
- **REQUEST_DENIED** indicates that your request was denied.
- **INVALID_REQUEST** generally indicates that the query (address, components or latlng) is missing.
- **UNKNOWN_ERROR** indicates that the request could not be processed due to a server error. The request may succeed if you try again.

Refreshing Tooltip Content

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

To refresh the tooltip content:

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

46 https://developers.google.com/maps/faq#over-limit-key-error

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, select the *Menu* ☰ icon .
2. Select *About*.
3. Next to **Reset Grid**, select 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.

- Verify that you have the resource options set up for your resource in Setting up resource options[47].
- Verify that you have fetched the coordinates for the technician starting locations in Setting up Geocoding for Technician Starting Locations on page 25.
- Verify that Vehicle Setup has been completed for each technician in Signature Service Management in Setting Up Vehicles on page 28.

Schedule Board isn't Updating

Refresh the Schedule Board

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

47 https://docs.key2act.io/display/SCHEDULE3/Setting+up+resource+options

Contact Information

Support

Phone: 262-317-3800
Email: support@wennsoft.com[48]
Hours: Normal support hours are 7:00 a.m. to 6:00 p.m. Central Time. After-hours and weekend support is available for an additional charge. Please contact WennSoft Support for additional information.

WennSoft will be closed in observance of the following holidays: New Year's Day, Memorial Day, Juneteenth, Independence Day, Labor Day, Veteran's Day, Thanksgiving Day, the day after Thanksgiving, Christmas Day, and the day after Christmas.

Support Plans

We're committed to providing the service you need to solve your problems and help your team maximize productivity.

We offer several Signature Enhancement and Support Plans to meet your needs and Extended Support Plans for retired product versions available at https://www.wennsoft.com/wsportal[49].

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