We are currently updating our site; thank you for your patience.

SERVICE

INTRODUCTION TO SCHEDULING

A Work Scheduling screen has been added within the **BPO_V2** application interface. It is designed for and can only be used by companies using TechConnect (the Auto Accept Call Assignment configuration flag must be set to 'No'), who needs to schedule Installations in advance.

Note that this function should **not** be used for every day service calls.

Users can easily view a list of Technicians and Unscheduled Work.

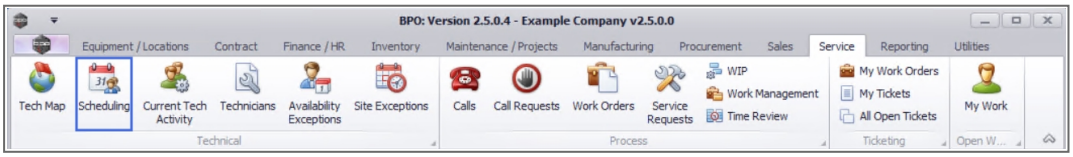
Technician calendars can be viewed across multiple or a filtered list of Technicians, within a variety of calendar view options.

An Unscheduled Work Order can be dragged onto a Technician's calendar, which will create a Call or Project Assignment.

Assignments can be rescheduled or reassigned to another Technician if the assignment has not yet been accepted.

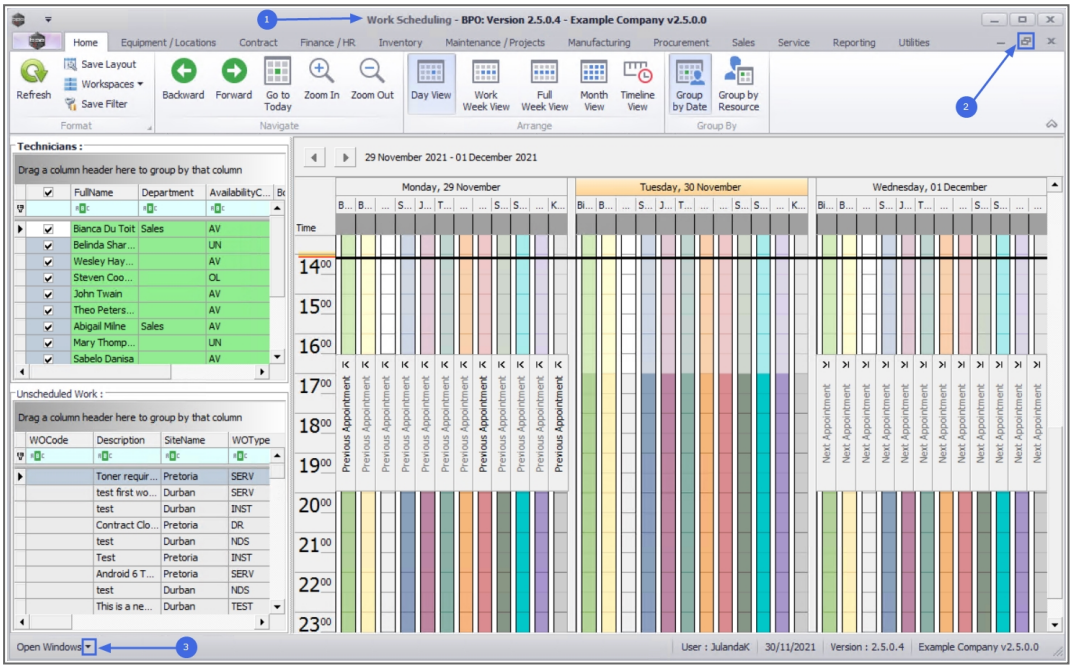
The assignment will be removed from the calendar when work has been completed.

Ribbon Access: Service > Scheduling



CO3 Technologies (Pty) Ltd © Company Confidential

1. The **Work Scheduling** screen will be displayed.
2. Maximizing the screen will enable you to view all the information more clearly.
3. If you have multiple screens open, navigate between the screens by clicking on the **down arrow** next to **Open Windows** and then click on the screen you wish to work in.



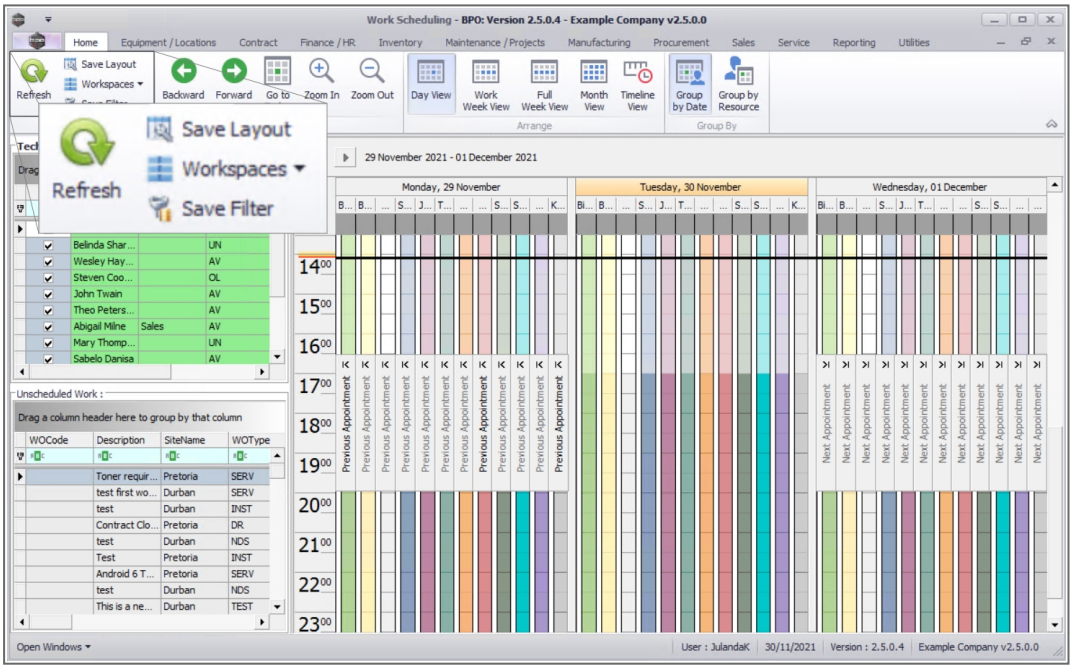
FORMAT ACTION BUTTONS

- **Refresh:** Updates the Technicians, Unscheduled Work and Calendar frames.
- **Save Layout:** Any changes made to the column order in the Technicians and Unscheduled Work frames will be saved.
- **Workspaces:** Workspaces refers to the grouping of windows on your desktop.
    - The purpose of this function is to reduce clutter and to make the screen that you are working in easier to navigate in.

CO3 Technologies (Pty) Ltd © Company Confidential

- You can **capture** multiple separate workspaces for different groups of related tasks. For example, a workspace you've named Reports could contain certain selected frames, panels and columns displaying the data that you use for preparing reports.
- You might set up other workspaces according to windows that you need to manage projects. All the Captured Workspaces can be saved and named and will then be listed in the drop-down list under **Workspaces**.
- Use **Reset** to reset the screen to it's original configuration before any adjustments were made.

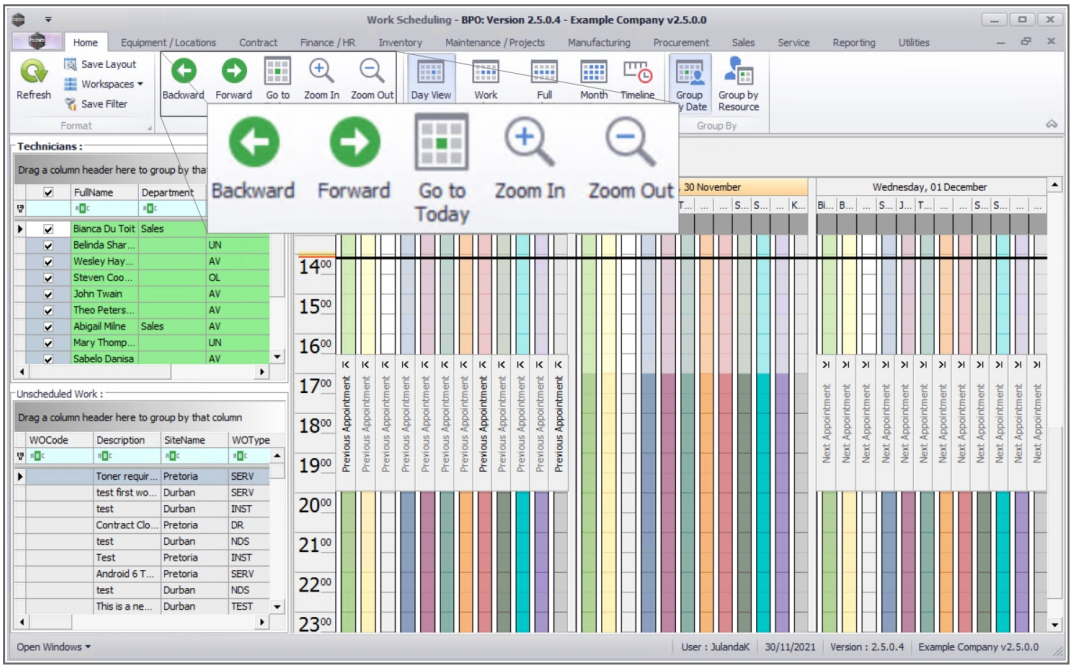
- **Save Filter:** Click on the Save Filter button if you wish any of the applied filters in this screen to be saved.



CO3 Technologies (Pty) Ltd © Company Confidential

NAVIGATE BUTTONS

- **Backward and Forward:** Navigate forward and backward in the calendar view.
- **Go to Today:** Navigates the calendar to the current day.
- **Zoom In and Zoom Out:** Increase or decrease the calendar view using the zoom buttons.



ARRANGE BUTTONS

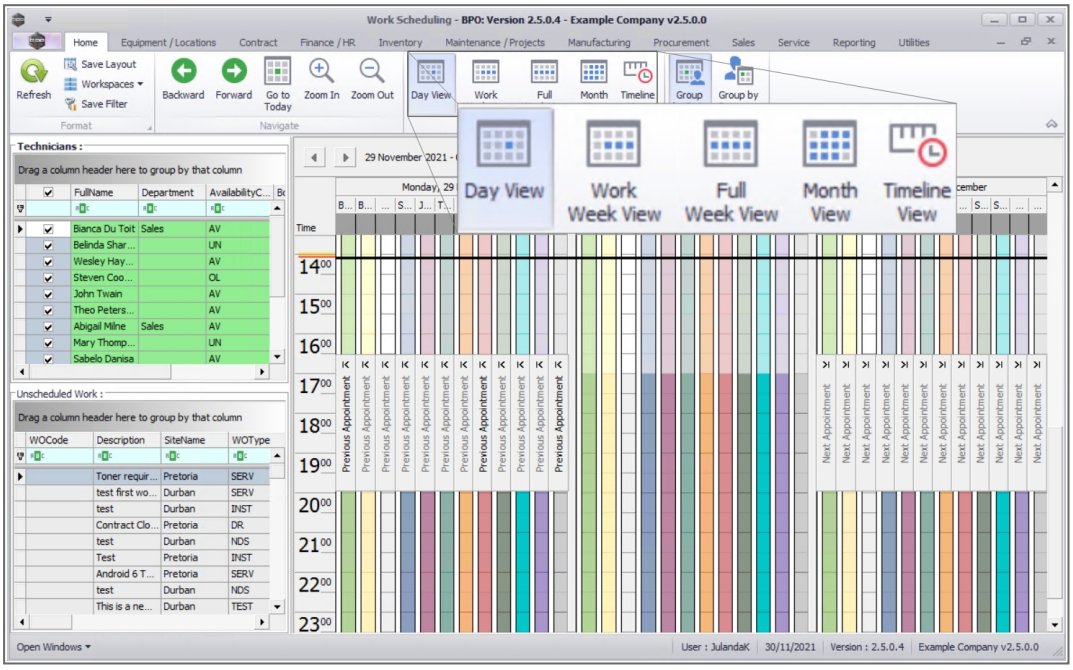
- **Day View:** This view is the most detailed view of appointments for a specific day.
- **Work Week View:** This view provides a detailed view for the working days for a certain week.
- **Full Week View:** This view arranges appointments for a particular week in a compact form.
- **Month View:** This is a multi-week calendar view, which is useful

CO3 Technologies (Pty) Ltd © Company Confidential

for long term planning.

- **Timeline View:** This view plots appointments in relation to time.

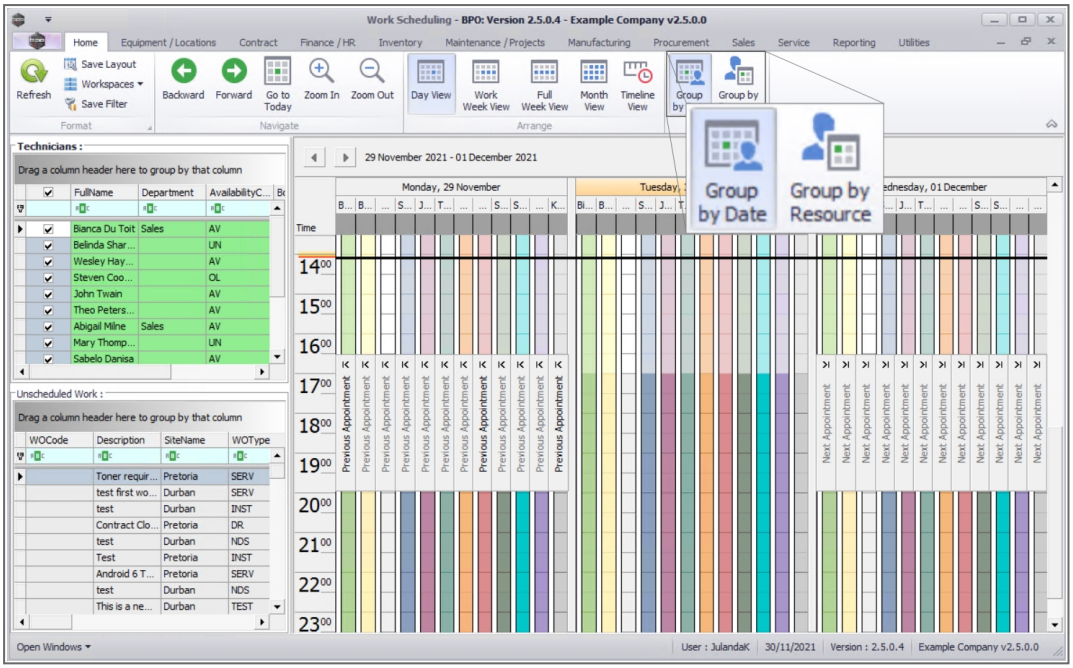
Refer to Different Calendar Views for further information and examples of each Arrange button.



GROUP BY ACTION BUTTONS

- **Group by Date:** Arrange the calendar view to group appointments by date.
- **Group by Resource:** Arrange the calendar view to group appointments by resource.

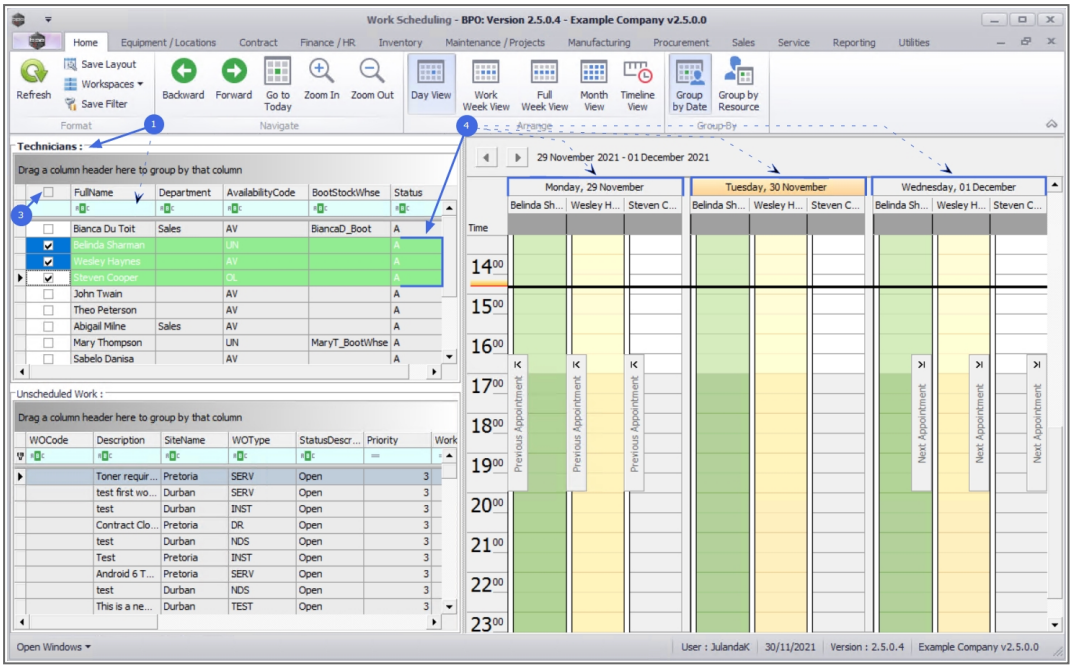
CO3 Technologies (Pty) Ltd © Company Confidential



TECHNICIANS GRID

1. All employees configured as Technicians will display in the **Technicians** grid.
2. All Technicians will be selected by **default**.
3. Click on the **header check box** to toggle between selecting or deselecting all Technicians.
4. Deselecting all technicians will allow you to select only the Technicians you wish to view a Work Schedule for.

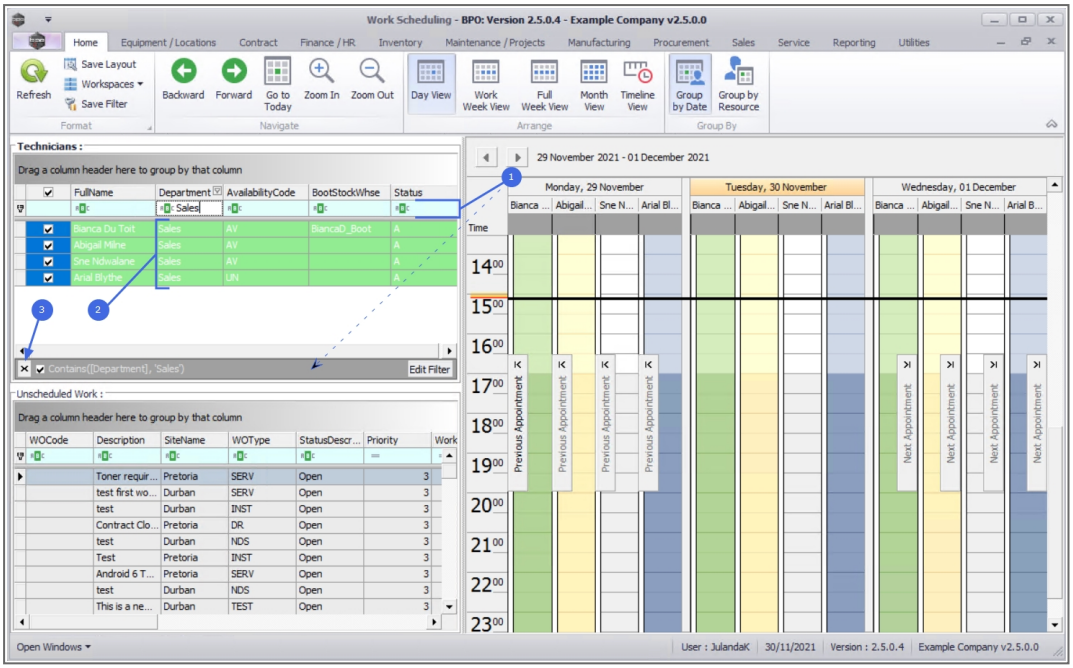
CO3 Technologies (Pty) Ltd © Company Confidential



FILTER ROW

1. Use the filter row to filter the Technician list. The Edit Filter row will display the selected filter(s).
    - The example has **Department** set to filer for the **Sales** department.
2. All the technician names linked to that department will be listed.
3. Click on the **X** to clear the filter.

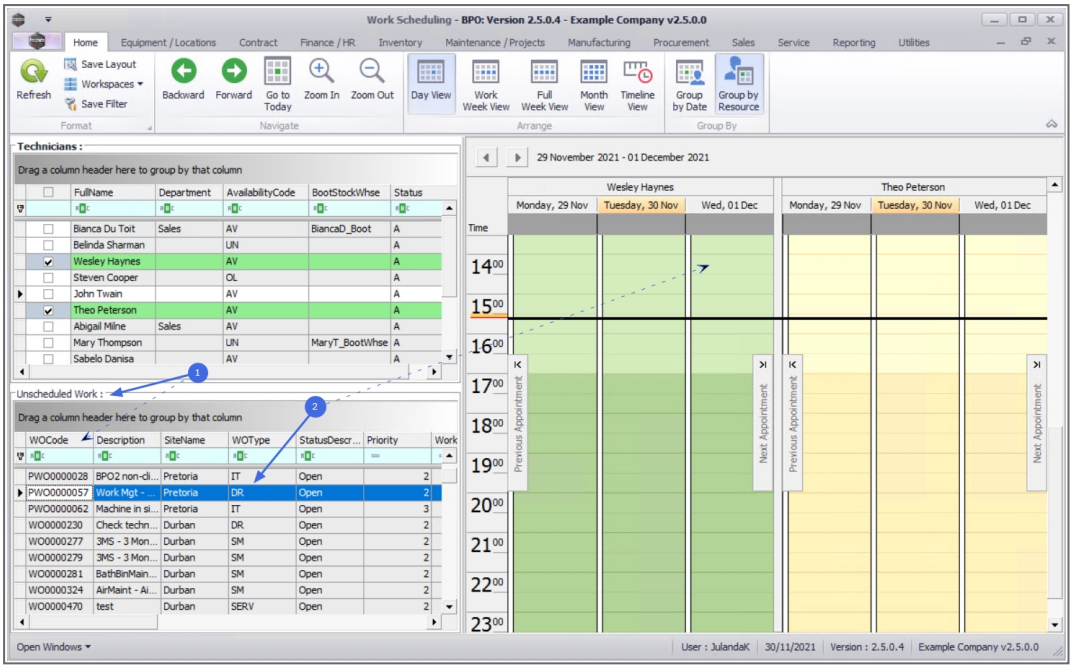
CO3 Technologies (Pty) Ltd © Company Confidential



UNSCHEDULED WORK

1. A list of all unassigned work orders (linked to Calls or Projects) will display in the **Unscheduled Work** grid.
2. You can **assign** a work order by **dragging** and **dropping** an Unscheduled Work order to a Technicians calendar.

CO3 Technologies (Pty) Ltd © Company Confidential

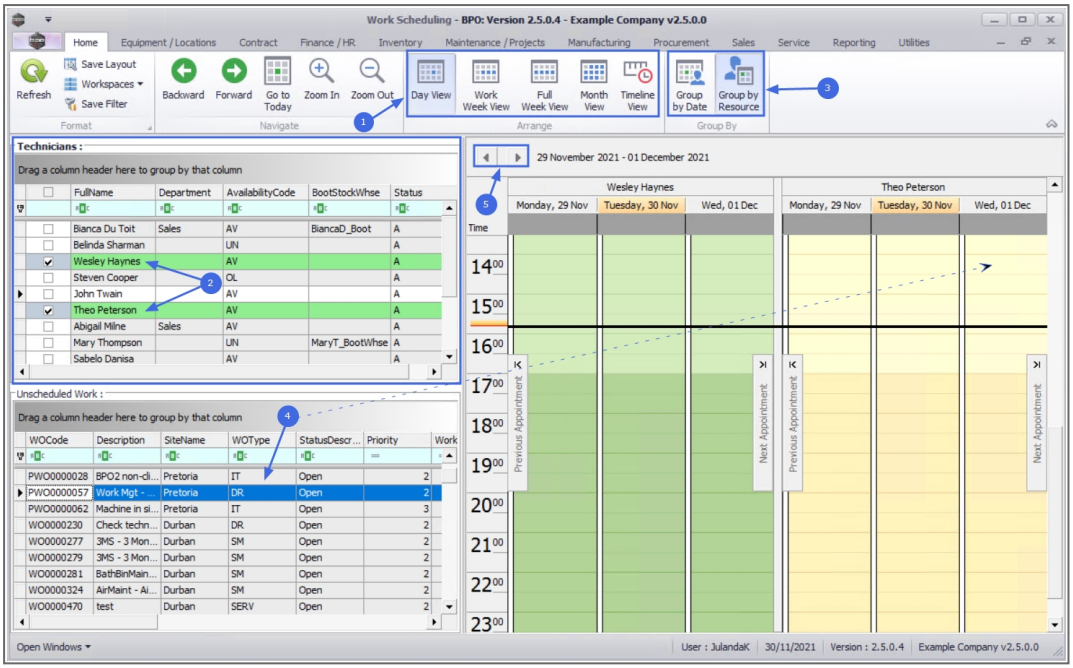


CALENDAR FRAME

The Calendar frame is configured by the following:

1. Arrange toolbar to change the calendar view (Day, Week, Month etc.)
2. Technician selection in order to view the required Technicians.
3. Group by Date or by Resource (Resource = Technician).
4. Dropping unscheduled work into this area to assign work.
5. Navigate buttons to navigate forward and back in the calendar.

CO3 Technologies (Pty) Ltd © Company Confidential

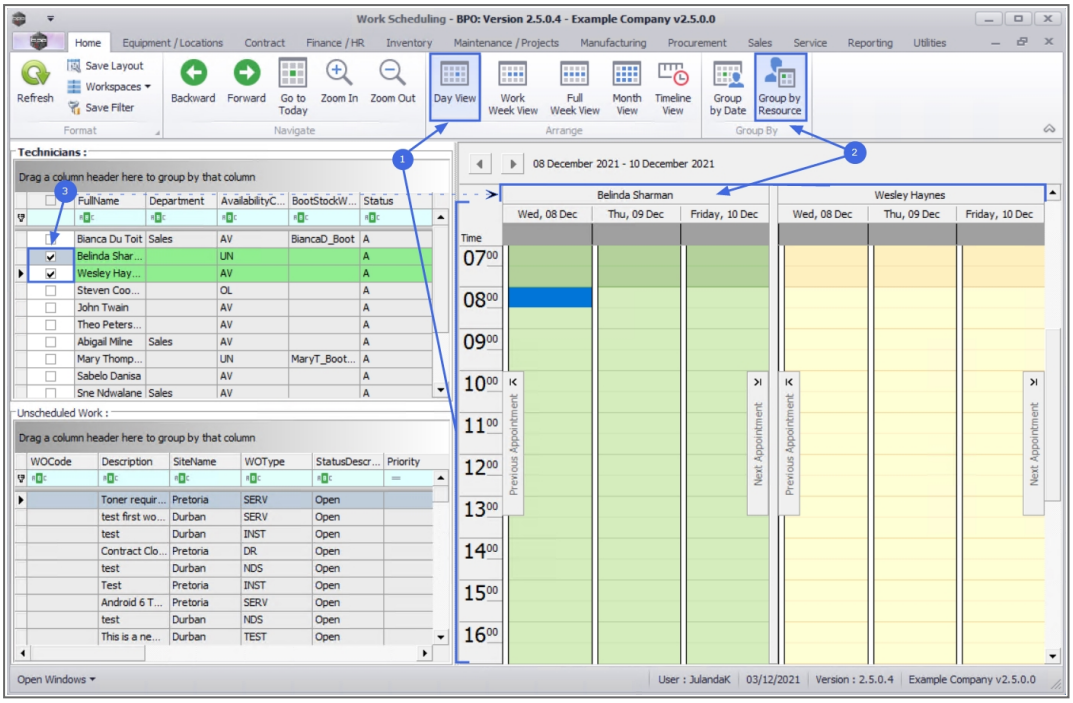


DIFFERENT CALENDAR VIEWS

Day View / Group by Resource

1. The image has **Day View** selected. This is the most detailed view of appointments for a specific day.
2. The **Group by Resource** (Technician) configuration has been selected.
3. **Remember** that the calendar will display only the technicians selected in the **Technicians** grid.

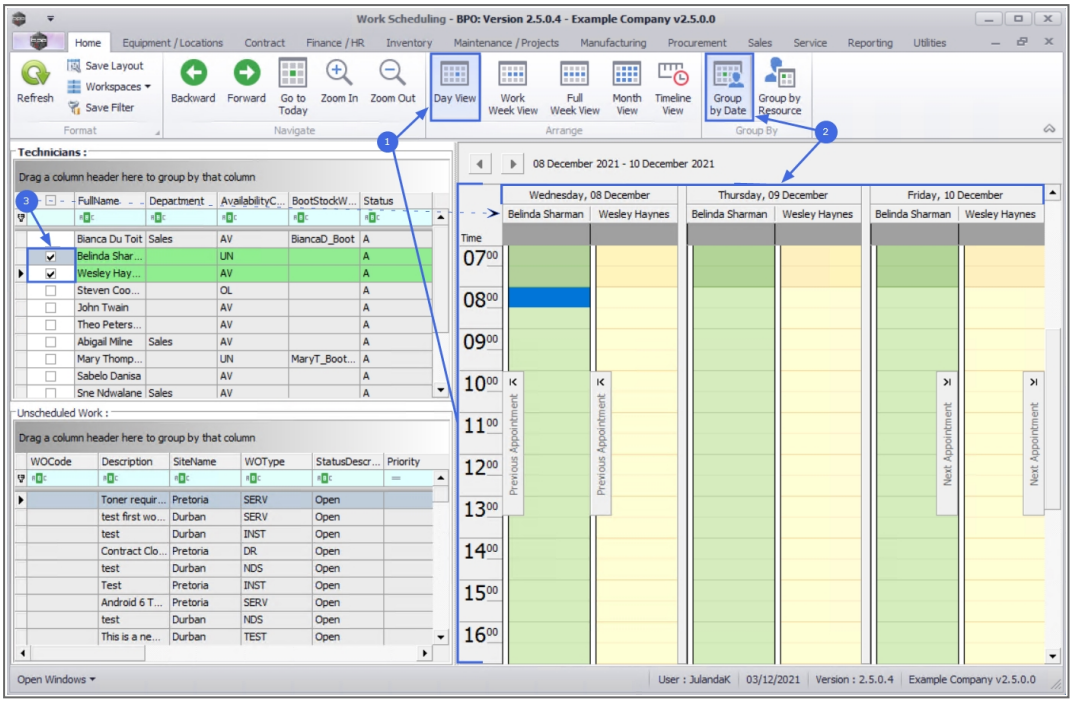
CO3 Technologies (Pty) Ltd © Company Confidential



Day View / Group by Date

1. The image has Day View selected. This is the most detailed view of appointments for a specific day.
2. The **Group by Date** configuration has been selected.
3. **Remember** that the calendar will display only the technicians selected in the **Technicians** grid.

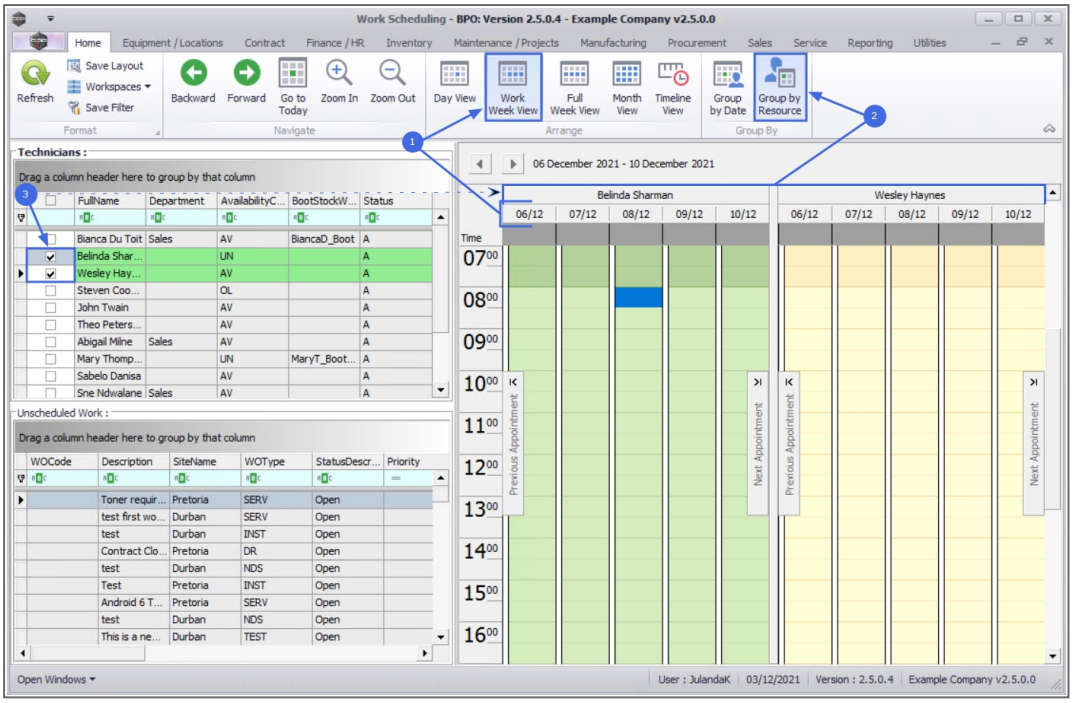
CO3 Technologies (Pty) Ltd © Company Confidential



Work Week View / Group by Resource

1. The image has **Work Week View** selected. This is a detailed view for the working days in a certain week.
2. The **Group by Resource** configuration has been selected.
3. **Remember** the calendar will display only the technicians selected in the **Technicians** grid.

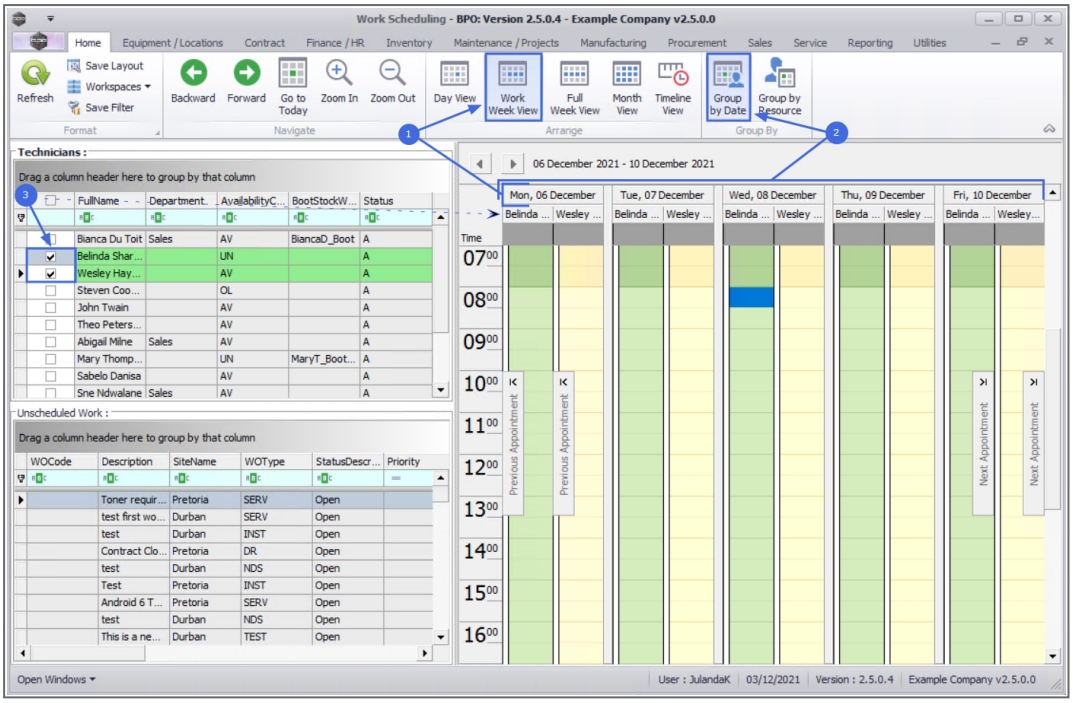
CO3 Technologies (Pty) Ltd © Company Confidential



Work Week view / Group by Date

1. The image has **Work Week View** selected. This is a detailed view for the working days in a work week - Monday to Friday.
2. The **Group by Date** configuration has been selected.
3. **Remember** the calendar will display only the technicians selected in the **Technicians** grid.

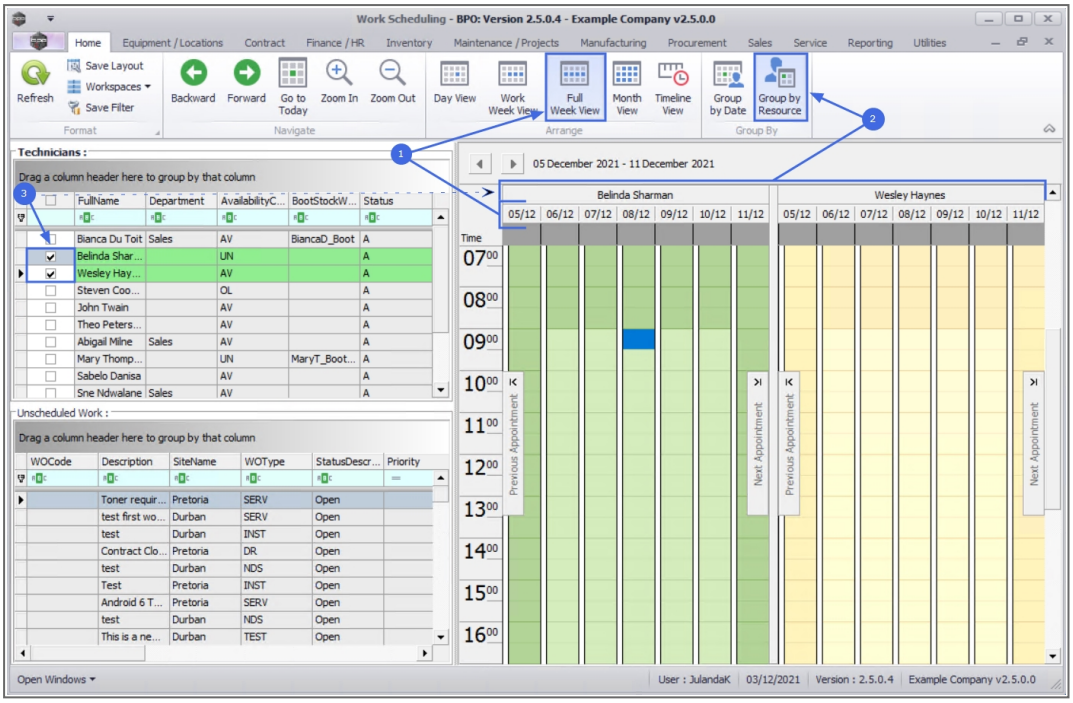
CO3 Technologies (Pty) Ltd © Company Confidential



Full Week View / Group by Resource

1. The image has **Full Week View** selected. This view arranges appointments for a particular week in a compact form and includes Saturday and Sunday.
2. The **Group by Resource** configuration has been selected.
3. **Remember** the calendar will display only the technicians selected in the **Technicians** grid.

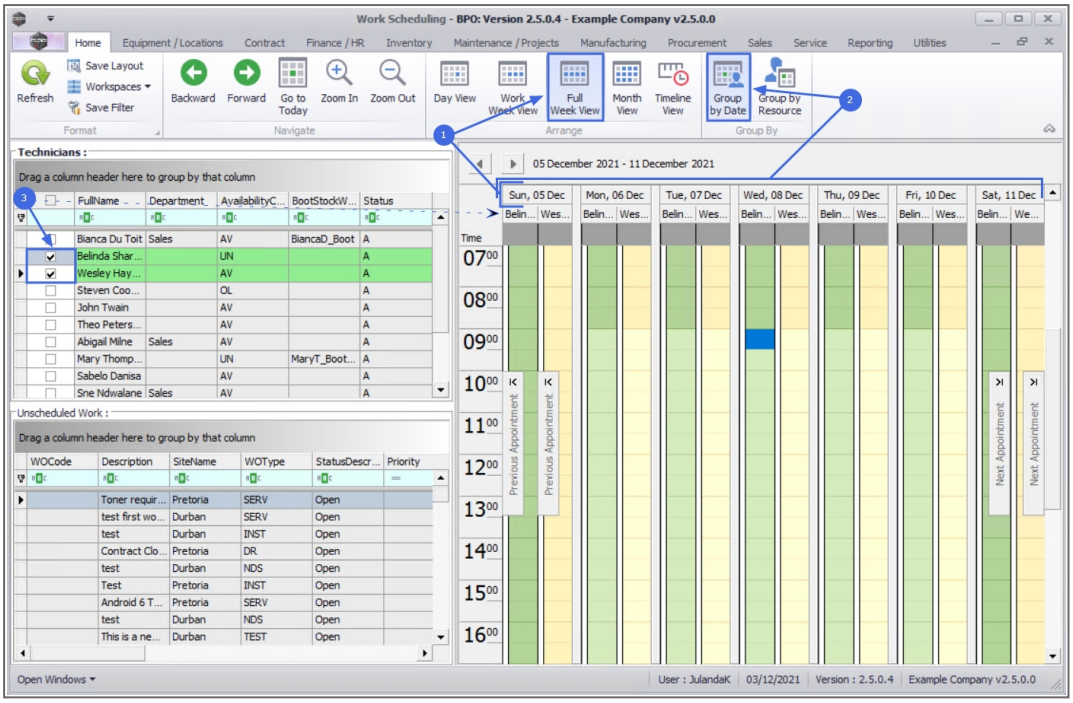
CO3 Technologies (Pty) Ltd © Company Confidential



Full Week View / Group by Date

1. The image has **Full Week View** selected. This view arranges appointments for a particular week in a compact form and includes Saturday and Sunday.
2. The **Group by Date** configuration has been selected.
3. **Remember** the calendar will display only the technicians selected in the **Technicians** grid.

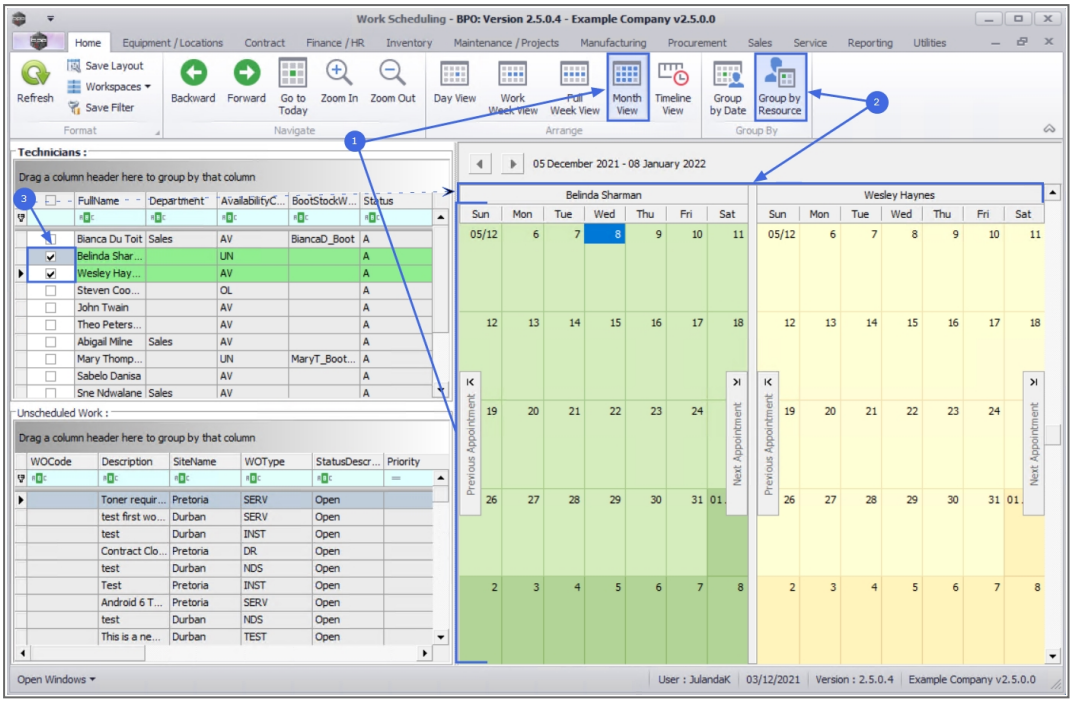
CO3 Technologies (Pty) Ltd © Company Confidential



Month view / Group by Resource

1. The image has **Month View** selected. This view is useful for long term planning.
2. The **Group by Resource** configuration has been selected.
3. **Remember** the calendar will display only the technicians selected in the **Technicians** grid.

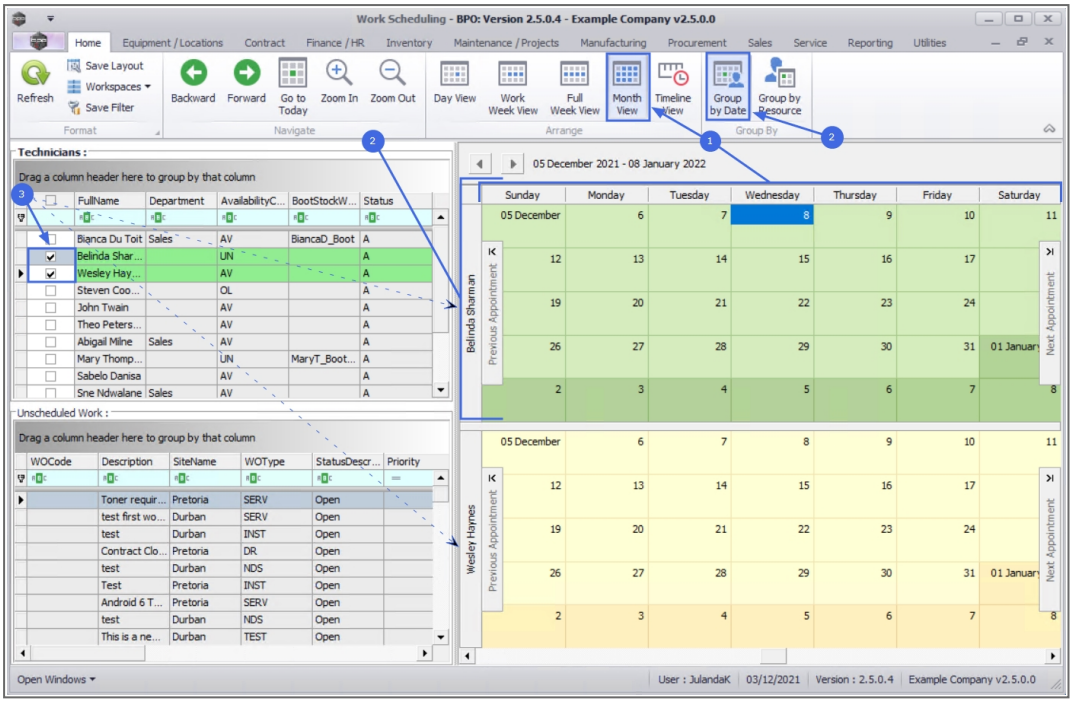
CO3 Technologies (Pty) Ltd © Company Confidential



Month View / Group by Date

1. The image has **Month View** selected. This view is useful for long term planning.
2. The **Group by Date** configuration has been selected.
3. **Remember** the calendar will display only the technicians selected in the **Technicians** grid.

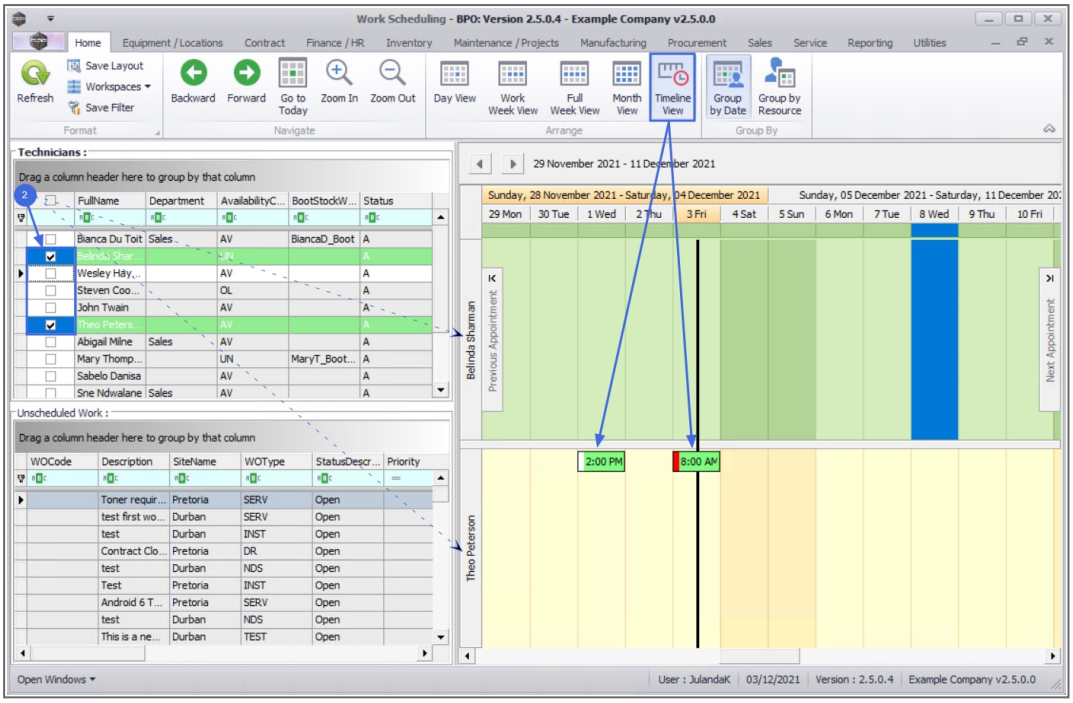
CO3 Technologies (Pty) Ltd © Company Confidential



TIMELINE VIEW

1. The **Time View** functionality plots appointments in relation to time.
2. **Remember** the calendar will display only the technicians selected in the **Technicians** grid.

CO3 Technologies (Pty) Ltd © Company Confidential



BPO.MNU.070

CO3 Technologies (Pty) Ltd © Company Confidential