

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 <u>TechConnect</u> (the <u>Auto Accept Call Assignment</u> 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.

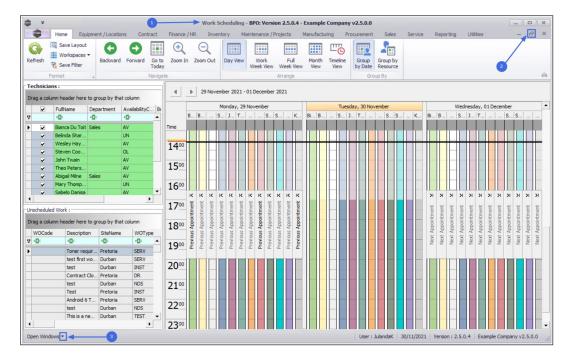
The assignment will be removed from the calendar when work has been completed.

Ribbon Access: Service > Scheduling





- 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

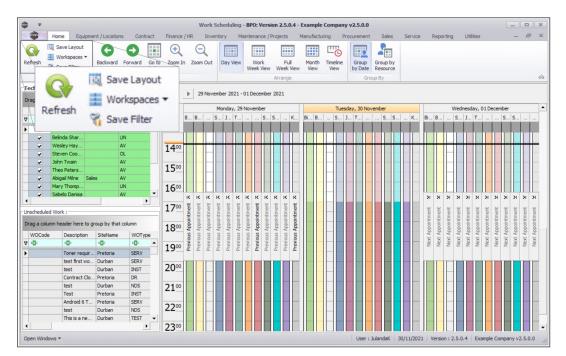
- **Refresh:** Updates the Technicians, Unscheduled Work and Calendar frames.
- **Save Layout:** Any changes made to the column order in the Technicians and Unscheduled Work frames will be saved.
- Workspaces: Workspaces refers to the grouping of windows on your desktop.
 - The purpose of this function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



- 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.





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.

ф т	Work 9	Scheduling - BPO: Version 2.5.0.4	- Example Company v2.5.0.0	×
Home Equipment / Locations Contract	Finance / HR Inver	ntory Maintenance / Projects	Manufacturing Procurement Sales Se	rvice Reporting Utilities — 🗗 🗙
Refresh Save Filter		Day View Work Full	Month Timeline V Date Croup by Croup by	
None Exponent / Locator Contract Prance / H2 Inventory Maintenance / Projects Neurofication Description Little - Description Description <thdescription< th=""> <thdescription< th=""> Descrip</thdescription<></thdescription<>				
	d Forward		20011 001	
Steven Coo OL				
Abigail Milne Sales AV				
Sabelo Danisa AV		* * * * * * * * *		
	17º0 te ut	ntment ntment ntment ntment ntment ntment ntment		ment ment ment ment ment ment ment ment
WOCode Description SiteName WOType	1800 Inddy sng	ous Appoi ous Appoi ous Appoi ous Appoi ous Appoi ous Appoi ous Appoi		t Appoint t Appoint t Appoint t Appoint t Appoint t Appoint t Appoint t Appoint t Appoint
Toner requir Pretoria SERV	Levin Previo	Previu Previu Previu Previu Previu Previu		Nee Nee Nee Nee Nee Nee Nee Nee Nee Nee
test Durban INST	2000			
Test Pretoria INST	2100			
test Durban NDS				
4	2300			
Open Windows 🕶			User : JulandaK 30/11	I/2021 Version : 2.5.0.4 Example Company v2.5.0.0

ARRANGE BUTTONS

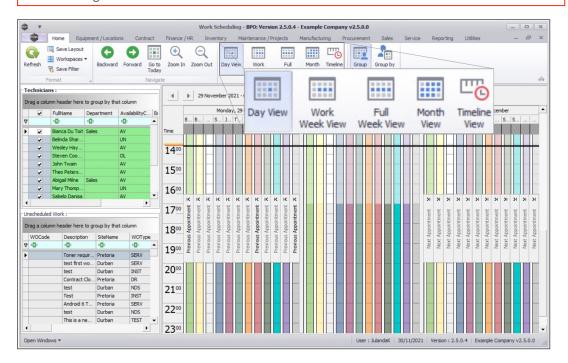
- **Day View:** This view is the most detailed view of appointments for a specific day.
- Work Week View: This view provides a detailed view for the working days for a certain week.
- Full Week View: This view arranges appointments for a particular week in a compact form.
- Month View: This is a multi-week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



for long term planning.

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

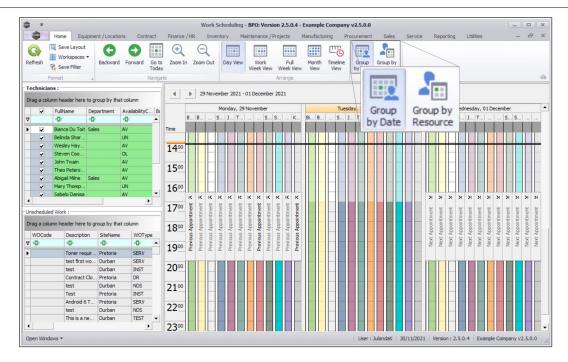
Refer to **Different Calendar Views** for further information and examples of each Arrange button.



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.





TECHNICIANS GRID

- 1. All employees configured as <u>Technicians</u> 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.



• •					Work Se	cheduling	- BPO: Ver	sion 2.5.0.4	- Example	Company	v2.5.0.0						_	
	Home Equipm	ent / Locations	Contract	Finance / HR	R Inven	tory M	aintenance	Projects	Manufactur	ing Pro	curemen	t. Sale	s Servio	e Reportir	ng Utilities		- 4	8 3
C.	🔯 Save Layout	G	0	(+)	Ξ					E.								
Refresh	Workspaces 🔻	Backward	Forward Go to	Zoom In 2	Zoom Out	Day View	Work	Full	Month	Timeline								
Refresh	🐐 Save Filter	Backward	Forward Go to Today		200m Out	Day view	Work Week Vier			View	Group by Date	Group Resour						
	Format		Naviga	te			4-22	Arrange			Gr	oup-By -			- 5.			4
Technici	ans :						T		1.			114.			125			
Drag a co	lumn header here to	roup by that o	column			/		▶ 29 No	vember 202	- 01 Decen	nber 202:	1	1 a			· - 1		
	FullName w	Department	AvailabilityCod	e BootStock	Whee St	atus		Mor	nday, 29 Nov	ember		Tues	day, 30 Nove	ember	Wedn	esday, 01 De	cember	
	* 0 :	REC	R	R				Belinda Sh	Wesley H.	Steven C	Bel	inda Sh	Wesley H	Steven C	Belinda Sh	Wesley H.	Steven	C
<u> </u>	Bianca Du Toit	Sales	AV	BiancaD B	Boot A		Time											
V	Belinda Sharman		UN		A													
~	Wesley Haynes						1400											
• •	Steven Cooper				A		17_											
	John Twain		AV		A		1 5 00											=
	Theo Peterson		AV		A		1500				-11-							_
	Abigail Milne	Sales	AV		A													_
	Mary Thompson Sabelo Danisa		UN AV	MaryT_Bo	otWhse A	-	1600				_ _							_
•	Sabelo Danisa		AV		A			к	к	к					к	к		ж
Unschedu	led Work +						1700	nent	lient	nent					성	넏		ŧ
	lumn header here to o	mount hu that a	a huma				-	ointr	Previous Appointment	Appointment					Next Appointment	Appointment		Appointment
							1800	App	App	App					bbo	odd		odd
WOCol	de Description	SiteName	WOType	StatusDescr.	Priority	Wor	k	ions	ious	Previous					ot A	Next A		Next A
A MC				-	-	_	1900	Prev	Prev	Prev					ž	Ž		ž
•	Toner requir. test first wo.	Pretoria	SERV	Open Open		3												
-	test first wo.	Durban Durban	INST	Open	_	3	2000											
	Contract Clo	Pretoria	DR	Open	-	3	_0											
	test	Durban	NDS	Open		3	2100											_
	Test	Pretoria	INST	Open		3	21											
	Android 6 T	Pretoria	SERV	Open		3	2200											_
	test	Durban	NDS	Open		3	2200											
	This is a ne	Durban	TEST	Open		3 -	2300											
4						•												

FILTER ROW

- 1. Use the <u>filter row</u> to filter the Technician list. The <u>Edit Filter row</u> 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.



T					Work Sc	heduling	BPO: Ver	ion 2.5.	.0.4 - Exa	ample C	ompany	v2.5.0.0							-		X
-	Home Equipme	ent / Locations	Contract	Finance / HR	Invent	ory Ma	intenance	Projects	Man	ufacturin	g Pri	ocuremen	t S	ales	Service	Reportin	g Util	ities	-	Ð	2
G	Save Layout	G	0) (Q																
Refresh	Save Filter	Backward F	Forward Go to Toda		oom Out	Day View	Work Week Vier	Week		Nonth 1 View	imeline View	Group by Date		up by ource							
	Format 4		Navigi	ate				Arrang	je			Gr	oup By								4
Technicia	ans:																				
Drag a col	lumn header here to g	roup by that o	olumn				•	▶ 2!	9 Novemb	er 2021 ·	01 Dece	mber 202:									
	FullName	Department S	AvailabilityCo	de BootStock	Whse Sta	tus	1		Monday,						0 Novemb				01 Decemb		
9	ADC .	I Sales	REC	8 0 0	·0•		\mathbf{F}	Bianca .	Abigail	Sne N	Arial	Bl Bia	nca	Abigail	Sne N	Arial Bl	Bianca	. Abigail	Sne N	Arial B.	
~	Bianca Du Toit	Sales					Time														
~	Abigail Milne	Sales																			
V	Sne Ndwalane	Sales					1400														
v	Arial Blythe	Sales	UN		Α,	1															
					1		1500						_								-
9	2				1.		12														
				1			1600														۲
•				- E		•	10.00										к	к	Х	>	-
× v Co	ntains([Department], '	'Sales')		*		Edit Filter	1 700	ĸ	ĸ	ĸ	ĸ		_				<u>з</u>	<u>л</u>		· ·	ы
Unschedul	led Work :						17ºº	mer	- a				_				ent	ent	ent	the second	G
Drag a col	lumn header here to g	roup by that o	olumn				1800	Previous Appointment	Previous Appointment	Previous Appointment	Previous Appointment						Next Appointment	ointment	ointm	- the second sec	Appointment
WOCod	de Description	SiteName	WOType	StatusDescr.	Priority	Work	18	IS At	IS At	IS Ag	- st						App	App	App	Ann	App
W #00	n 🖬 c	n C	# 	n 🗖 c	=	-		evior	evior	evior	evior		_				Next	Next	Next	Alont	Next
Þ	Toner requir	. Pretoria	SERV	Open		3	1900	ζ.	- E	- A	E										
	test first wo	Durban	SERV	Open		3															
	test	Durban	INST	Open		3	2000									_					
	Contract Clo	. Pretoria	DR	Open		3															
	test	Durban	NDS	Open		3	2100														
	Test	Pretoria	INST	Open		3															1
-	Android 6 T	Pretoria	SERV	Open	_	3	2200														
	test	Durban	NDS	Open	_	-															
	This is a																				
	This is a ne	Durban	TEST	Open		3 -	2300														

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.



•							Wor	k Scheduling	- BPO: Vers	ion 2.5.0.4 - Exa	mple Compa	ny v2.5.0.0)						>
-	Home	Equipme	ent / Location	s Cont	ract	Finance / I	HR In	ventory M	aintenance /	Projects Man	afacturing	Procuremen	t. Sales	Service	Reportin	g Utilities	-	8	
0	Save La	ayout	0	0	1111	(+)	Θ												
	Worksp	aces •				Q	4				-C								
Refresh	Save F		Backward	Forward	Go to Today	Zoom In	Zoom Ou	ut Day View	Work Week Viev		onth Timelin iew View								
	Format	incer			Navigate				week viev	Arrange	iew view	by Date	e Resource						
Technic		1			navigate				1	Arrange		6	roup by						
									4	29 November	r 2021 - 01 De	cember 202	1						
Drag a co	olumn header	r here to g	roup by that													Theo Peterson			
	FullName		Department		lityCode		ockWhse	Status		Monday, 29 Nov	Wesley Ha								
9	R C		RBC	ROC		8 0 0		* 0 ¢		Monday, 29 Nov	Tuesday, 3		Ned, 01 Dec	Monda	/, 29 Nov	Tuesday, 30 Nov	Wed, 01	Dec	ä
	Bianca Di		Sales	AV		BiancaD	_Boot	A	Time										l
	Belinda S			UN				A											
~	Wesley H			AV				A	1400			-7	•						
	Steven C John Twa			OL AV		_		A				1							
	Theo Pet			AV				Δ	1500										
	Abigail M		Sales	AV				Δ	10										-
	Mary The		buice	UN		MarvT	BootWhse	A	1600										
	Sabelo D			AV				A	10	к			к	к				X	
4			1						1 700	K 2									
Unschedu	led Work : ¬		1				100		17º	E	-		Tent	the				tent	1
Drag a co	umn header	here to g	roup by that	column		2			1000	Appoin			Next Appointment	evious Appointment				Next Appointment	
-	de 🔺 Des	-	SiteName	WOTy	~ /	StatusDes	cr Priori	ity Wor	18ºº	s Ap			Appe	s Ap				Anne	4
V =0:	100		n C	10017		REC.	=	=		Mon			lext	- NOL				lext	14.74
PWO0	000028 BPC)2 non-cli	Pretoria	П		Open	_	2	1900	Prev			-	Pre				-	1
	000057 Wo		Pretoria	DR	_	Open		2	1										
	000062 Mac		. Pretoria	Π		Open		3	2000										
WOOD	00230 Che	ck techn	. Durban	DR		Open		2											
WOOD	00277 3MS	5 - 3 Mon	. Durban	SM		Open		2	2100										
WOOD		5 - 3 Mon	. Durban	SM		Open		2											
WO00		hBinMain	Durban	SM		Open		2	2200										
WO00		1aint - Ai	Durban	SM		Open		2	2200										
WOOD	00470 test	t	Durban	SERV	1	Open		2 👻											
4								•	2300										

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.



ф т					Work Scheduli	ng - BPO: Vers	ion 2.5.0.4 - Exa	mple Company	y v2.5.0.0						
	Home Equipme	ent / Locations	Contract	Finance / HR	Inventory	Maintenance /	Projects Man	afacturing P	rocuremen	t Sales	Service	Reporting) Utilities	-	8
Refrech	I Save Layout Workspaces ▼ Save Filter	G Backward		4	m Out Day Vie	ew Work	Full M	onth Timeline	Group	Group by		3			
			Today			Week Viev		iew View	by Date						
	Format 4		Navigat	e		1	Arrange		G	oup By					
Technicia	uns : umn header here to o	and the state of	- L			•	29 November	er 2021 - 01 Deci	ember 202	ı					
	FullName	Department	AvailabilityCode	BootStockW	nse Status	-		Wesley Hay	nes				Theo Peterson		
67	Pulivame	Department	AVailabilityCode	BOOTSTOCKW	ille	. 5	Monday, 29 Nov	Tuesday, 30	Nov V	Ved, 01 Dec	Monday	29 Nov	Tuesday, 30 Nov	Wed, 011	Dec
-		-													
	Bianca Du Toit Belinda Sharman	Sales	AV	BiancaD_Boo	A A	Time									
~	Wesley Haynes		AV		A	1 4 00									
•	Steven Cooper		OL		A	1400									
	John Twain	2	AV		A	·									
	Theo Peterson		AV		A	1500					1				
	Abigail Milne	Sales	AV		A			-	-	1.185					
	Mary Thompson		UN	MaryT_Boot	Whse A	1600		1	1						
	Sabelo Danisa		AV		A		K			к	к				к
4					•	1700	2				2				
Unschedule	ed Work :				11000	1/	E .	-		Tent	the				lent
Drag a colu	umn header here to g	group by that o	olumn 4			1800	doin			Next Appointment	Appointment				Next Appointment
WOCod	e Description	SiteName	WOType /	StatusDescr	Priority V	Vork 1800	Al SI			App	Is At				App
V 10:	100	A C	10:	100			avio.			Vext	Previous				Vext
	00028 BPO2 non-cli.	Pretoria	Π	Open	2	1900	ž			2	- F				2
	00057 Work Mgt	. Pretoria	DR	Open	2										
	00062 Machine in si.		Π	Open	3	2000									
W00000	0230 Check techn.	Durban	DR	Open	2										
W00000	0277 3MS - 3 Mon	. Durban	SM	Open	2	2100									
W00000	0279 3MS - 3 Mon	. Durban	SM	Open	2										
		. Durban	SM	Open	2	2200									
WO0000	0324 AirMaint - Ai	. Durban	SM	Open	2	2200									
WO0000				Open	2	-									
	0470 test	Durban	SERV	Open	-	2300									

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.



•	-								sion 2.5.0.4 - Exa			Constant Day	oorting Utilities	2	×
1			ent / Location	is Contract	Finance / H	R Invent	ory	Maintenan	ce / Projects Ma	nufacturing Pro	ocurement Sales	Service Rep	oorting Utilities		
C	2 1	💐 Save Layout	G	0	• •	Θ	E			·····	5 🔢 🗸				
		Workspaces 🔻			- ·	~						_			
Ref	resh	🐔 Save Filter	Backward			Zoom Out	Day		Work Full ek View Week Vie	Month Timeli w View View		source			
	F	ormat							Arrange	n nen nei	Group B				4
Ta	hnicia					~	/					2			-
						- 0		4	08 December	2021 - 10 Decemb	er 2021	2			
Dra	ig a colu	mn header here to	group by tha	it column								\leq			_
Т		FullName D	Department	AvailabilityC	BootStockW	Status	- 1 -	<u> </u>		Belinda Sharman			Wesley Haynes		
V		8 0 0 8	ome Equipment / Locations Contract Finance / HR Save Layout Workspaces ▼ Save Fitter Ted Save Ted Save Fitter Ted Save Ted Save Fitter Ted Save Ted Sa				-		Wed, 08 Dec	Thu, 09 Dec	Friday, 10 Dec	Wed, 08 Dec	Thu, 09 Dec	Friday, 10 Dec	:
T		Bianca Du Toit S	me Equipment / Locations Contract Finance / HR Save Eayout Workspaces - Save Filter term factor of the second					Time							
	~	Belinda Shar	Equipment / Locations Contract Finance / HR. e Layout kapaces • e Filter Badward Forward Go to Go to Today Jonn In Today AvailabilityC BootstotdKV BootstotdK		A		0700								
Þ	~	Wesley Hay		AV		A	1	0/_							
		Steven Coo		OL		A		0000							
		John Twain		AV		A		0800							
		Theo Peters		AV		A									
		Abigail Milne S	ales	AV		A		0900							
		Mary Thomp		UN	MaryT_Boot	A									
		Sabelo Danisa				A		1000	к		К	к)	ж
		Sne Ndwalane S	ales	AV		A	-	10_	t			ŧ			
Uns	chedule	d Work :					_	1100	the		Tien	the			nen
Dra	ig a colu	mn header here to	group by tha	t column				11	poir		Next Appointment	Appointment			Next Appointment
	VOCode	Description	SiteName	WOType	StatusDe	scr Priorit	v	1 200	ty sr		App	ly sr		You V	App
9						=	-	1200	evior		Vext	revions		tout	Vext
Þ		Toner requi	r Pretoria	SERV	Open				£			ě.			
		test first wo	Durban	SERV	Open			1300							_
		test	Durban	INST	Open										
		Contract Cl	o Pretoria	DR	Open			1400							
		test	Durban	NDS	Open										
		Test	Pretoria	INST	Open			1500							
		Android 6 T	Pretoria	SERV	Open			15.							
T		test	Durban	NDS	Open			1.0.1							
		This is a ne.	Durban	TEST	Open		•	1600							
4							•	L							

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.



•				Wo	rk Schedulin	g - BPO: Ver	sion 2.5.0.4 - Example Company v	/2.5.0.0	_ □	
	Home Equipm	ent / Location	s Contract	Finance / HR	Inventory	Maintenan	ce / Projects Manufacturing Pro	ocurement Sales Service Re	eporting Utilities — 🗗	P X
Pefrech	Save Layout Workspaces • Save Filter	Backward	Forward G		Coom Out	ay View	Vork Full Month Timeli	ine Group Group by		
				day		We	ek View Week View View View			
	rmat	4	Nav	/igate		N	Arrange	Group By 2		6
Technician	s :				7		08 December 2021 - 10 December	er 2021		
Drag a colum	n header here to	group by that	t column							
3	FullName D	epartment	AvailabilityC	BootStockW Sta	atus		Wednesday, 08 December	Thursday, 09 December	Friday, 10 December	
9			88C	REC RE		>	Belinda Sharman Wesley Haynes	Belinda Sharman Wesley Haynes	Belinda Sharman Wesley Hayn	es
	Bianca Du Toit S	ales	AV	BiancaD Boot A		Time				
~	Belinda Shar		UN	A		0700				
•	Wesley Hay		AV	A		0/_				
	Steven Coo		OL	A		0800				
	John Twain		AV	A		00				
	Theo Peters		AV	A		0.000				
			AV	A		0900				
	Mary Thomp Sabelo Danisa		UN AV	MaryT_Boot A						
	Sne Ndwalane S		AV	A		1000	к		к	ы
Unscheduled		uica I		10		-V	Jent		t i	t
						1100	Appointment		Vext Appointment	Next Appointment
Drag a colum	n header here to	group by that	t column				Appo		poir	poir
WOCode	Description		WOType	StatusDescr.	Priority	1200	sno		t Ap	t Ap
9 a 🛛 c	a 🗖 c	n C	R C	a 🗖 c			Previous		S	Nei
•	Toner requi	r Pretoria	SERV	Open		1300	aa			
	test first wo		SERV	Open		12.00				-
	test	Durban	INST	Open		1 4 00				
	Contract Cl		DR	Open		1400				
_	test Test	Durban Pretoria	NDS INST	Open	-					
	Android 6 T		SERV	Open Open		1500				
	test	Durban	NDS	Open						
	This is a ne.		TEST	Open		- 1600				
					•					

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.



•		-				W	ork Schedu					le Compa	ny v2.5.0.0	•				-		×
	-		Home Equip	oment / Locati	ons Contract	t Finance / HR	Inventor	ry	Maintenan	ce / Project	ts Manuf	facturing	Procureme	ent Sales	Service	Reporti	ng Utiliti	es	- 8	>
6	2	1	💐 Save Layout	G	0	+	Θ		II II				E C							
0	31		Workspaces			\sim	4	_					-		_					
Re	fre	sh	Save Filter	Backwar			Zoom Out	Day		Work ek View	Full Week View	Month View			source					
			ormat					/	Inte		rrange	VICH	VIC 10	Group B		2^2				6
.		nicia		4	110	avigate					mange			Group b	7	/				-
									4	▶ 06 D	ecember 20	21 - 10 Dec	ember 2021							
	ag	a colu	imn header here	to group by th	nat column				\sim											-
3	2		FullName	Department	AvailabilityC		Status					elinda Sharr					esley Hayn			4
9	/		R <mark>B</mark> C	Vorkspaces * ave Fiter * ist Newgate * Newgate			E C	•		06/12	07/12	08/12	09/12	10/12	06/12	07/12	08/12	09/12	10/12	4
	4		Bianca Du Toit	Ave Layout forkspaces • ave Filter t backward Forward Go to Com Com Com Com Com Com Com Com Com Co					Time											
		¥	Belinda Shar	apment / Locations Contract Finance / HR At s - Badoward Forward Co to Zoom In 2 Badoward			1		0700											
۲		✓	Wesley Hay																	
			Steven Coo					_	0800											
			John Twain					- 1	00_											
			Theo Peters			f	`		0000											
-			-	Sales		-		-	0900											
+								- 1												4
+	-	<u>–</u>		Color				-	1000	к				к	к				Х	1
			d Work :	Juica						lent				ť	lent				2	2
									1100	ointr				Next Appointment	Appointment				Next-Appointment	
Dra	ag	a colu	imn header here	to group by th	nat column					App				ppoi	App				ioou	2
		OCode					r Priority		1200	sno				xt A	evious				vt A	
9	•	¢	a 🗖 c	e C	R C	* 0 ¢	-	•		revi				Ne	Previ				Ne	2
Þ			Last Press Press						1300	-					-					
									15											1
								_	4 4 00											
4	_							_	1400											
-							-	_												
4	_						_	_	1500											
+							-	-												
+	-		This is a n				_	•	1600											
4			1115 15 0 11	ourbait	1601	open			10_											
							-				11	11	11						1	
Эþ	en	Winde	ows 🕶										User : Julan	daK 03/12	2/2021 Ver	sion: 2.5.0	.4 Examp	ole Company	v2.5.0.0	

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.



6	•	Home Equip	ment / Locatio	ns Contract	Finance / HR	Inventor	ry	Maintenan	ce / Proje	ects Manu	ufacturing	Procureme	ent Sales	Servio	e Report	ting Utiliti	es -	- 0	×
C	57	🔍 Save Layout	G	Ð	•	Q	11	•				CC I							
Refi	och					Zoom Out	Day	View	Nork	Full		-		oup by					
		🐐 Save Filter							ek View	Week View	View			source					
	F	ormat	4	Na	vigate					Arrange			Group B	y	2				6
Teo	hnicia	ns:																	
-	t	and based on base 4	a manual builds	- to a large state of the state				1	▶ 06	December 2	021 - 10 De	cember 2021							
3	g a colu								Mag. O	6 December	Tur 0	December	Wed on	December	Thu oo	December	Fri, 10 D		٦
-	t									Wesley		Wesley	Belinda			Wesley	Belinda		ł
4			-	88C	-	-	•	· · · ·	beinga .	wesley	beinda .	wesley	beinga	wesley	beinga	. wesley	beinda	wesley	1
			ave Layout forkspaces - ave Filter t Badoward Forward G to Zoom In Zoor Today Badoward Forward G to Zoom In Zoor Today Coor In Zoor Coor In Zoor Today Badoward Forward G to Zoom In Zoor Today Status Badoward Forward G to Zoom In Zoor Today Status Coor Status Coor Co			Time											4		
	~	Belinda Shar		Badward Forward Go to Zoom In Zo Today Revigate Go to Zoom In Zo Today Revigate group by that column apartment. AvaiabilityC BoolStockW Stat av av Av Av A A Av A			0700										1		
•	•	Wesley Hay																1	
							- 1	0800										1	
-							- 1											1	
-			Salec					0900										1	
		Mary Thomp	Juica					09_										1	
-		Sabelo Danisa						1000									к	к	
		Sne Ndwalane	Sales	AV	A		-	1000	×	K							×	<u>л</u>	1
Uns	chedule	d Work :							- uer								ent	ent	5
Dra	g a colu	imn header here t	to group by th	at column				1100	opoint	Previous Appointment							Vext Appointment	Next Appointment	
N	/OCode	Description	n SiteName	e WOType	StatusDesc	Priority		1300	IA 21	Is Al							App	App	Ê.
9						=	•	1200	svior	evior							Vext	Vext	1
Þ		Toper reg	ir Pretoria	SERV	Open				Pre-	Pre							-		
						-		1300											J
-		test	Durban	INST	Open	_	- 34											1	
		Contract C	lo Pretoria	DR	Open			1400										1	
		test	Durban	NDS	Open														
		Test	Pretoria	INST	Open			1500										i l	
					-			13_											
		test				_	_	1 6 00										il l	
		This is a ne	e Durban	TEST	Open		•	1600											
4							•											i l	

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.



	*	Home Equir	ment / Locatio	ns Contract	Finance / HR	ork Schedu Inventor		BPO: Ver Maintenan				cturing		5.0.0	Sales	Serv	ica D	eporting	u Utili	ties			×
		Save Layout	ment / Locauo		-	0	_		_							Jeiv	ue n	epor ung	, 00	iues	_	-	1
0			G	Ð	• 🕀	Q	10.10	1 1 1 1 1 1					Ш										
Ref	resh	Workspaces	Backward			Zoom Out	Day	View	Work	Fu	_	Month	Timeline	Gro	_	up by							
		🐐 Save Filter			oday		,		ek View	Week	View	View	View	by D		source	-	-					
	F	Format	4	Nav	vigate			/		Arrange	2				Group B	γ	/						6
Те	chnicia	ins :				-0-	$ \frown$		-								/						
Dra		umn header here	to group by the	at column				•	▶ 0	5 Decem	per 202	1 - 11 De	cember :	2021		/							
3	y a coi							<u> -></u>			Beli	nda Shar	man					We	slev Hav	nes			٦
Ţ	<u> </u>	FullName	Department	AvailabilityC					05/12	06/12	-			10/12	11/12	05/12	06/12				10/12	11/12	, î
8		-	-		-	Open Open Open Open			00/12	00/11	01/12	00/11	03/12	10/11	11/12	00/12	00/12	07712	00/12	03/12	10/12	11/12	1
		Bianca Du Toit Belinda Shar	Sales		BiancaD_Boot A			Time															
	~	Belinda Shar Wesley Hay		UN AV				0700															
1		Steven Coo		OL																			
		John Twain		AV			- 1	0800															
		Theo Peters		AV	A		- 1																
		Abigail Milne	Sales	AV	A			0900															
T		Mary Thomp		UN	MaryT_Boot A																		
		Sabelo Danisa		AV	A			1000	к						н	к						к	
		Sne Ndwalane	Sales	AV	A		-	10	뉟													-	
Uns	chedule	ed Work :						1100	ti -						- lei	the	-					nent	
Dra	ig a col	umn header here	to group by the	at column				11.00	poir						Next Appointment	Appointment						Next Appointment	
	NOCod	e Descriptio	n SiteName	WOType	StatusDesc	Priority		1 3 00	Is Ap						App	Is Ap						App	£.
9		100	n C	# 0 0		=	•	1200	evior						Vext	evious						Vext	
Þ		Toner reg	uir Pretoria	SERV	Open				ě.							E _							
		test first	vo Durban	SERV				1300															J
		test	Durban	INST	Open		-																
		Contract	Clo Pretoria	DR.	Open			1400															
		test	Durban	NDS	Open																		
		Test	Pretoria	INST				1500															
		Android 6		SERV	-			13_															
4		test	Durban	NDS		_		1600															
		This is a n	e Durban	TEST	Open		-	16º															
4						,																	

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.



	-					Vork Sched															_	
100		Home Equip	ment / Locatio	ons Contract	Finance / HF	t Invento	ry	Maintenan	ce / Pro	jects	Manuf	acturing	Proc	urement	Sales	s Ser	vice	Reporting) Utili	ties	-	8
C		Save Layout	G	0	+	$\overline{-}$	11	•					Ш		A.							
0		Workspaces			\sim	~	_			_	_		- U									
Refr	esh 💡	Save Filter	Backware		o to Zoom In oday	Zoom Out	Day		Work		-ull k View	Month	Timeline View	e Gro by D		oup by source		2				
		rmat			ivigate				CK VICH	Arran		VICIT	VICIN	by b	Group E							6
_			4	TVC	ivigate		1			And	iye				Group c		/					
Tec	hnicians	s:					_		b (05 Decer	mber 203	21 - 11 D	ecember	2021								
Drag	g a colum	nn header here	to group by th	at column				-×.														
3	E	FullName	Department	AvailabilityC	BootStockW	Status		r I	Sun, (05 Dec	Mon,	06 Dec	Tue,	07 Dec	Wed,	08 Dec	Thu,	09 Dec	Fri, 1	0 Dec	Sat, 1	1 Dec
9	_	8 8 0	H E C	80C	ROC	R B C	-	>	Belin	Wes	Belin.	Wes	Belin	. Wes	Belin	Wes	Belin	Wes	Belin	Wes	Belin	We
T		Bianca Du Toit	Sales	AV	BiancaD_Boot	A		Time														
	-	Belinda Shar		UN	_	A		0700														
•		Wesley Hay		AV		A		0/_														
		Steven Coo		OL		A		0800														
		John Twain		AV		A		08.00														
		Theo Peters		AV		A																
			Sales	AV		A		0900														
		Mary Thomp		UN		A	_															
		Sabelo Danisa		AV		A	-	1000	к	к											н	к
		Sne Ndwalane	Sales	AV		A			aut	ti												4
Unso	cheduled	Work :					_	1100	the state	- E											mer	mer
Dra	g a colum	n header here	to group by th	at column				++-	bpol	Previous Appointment											Next Appointment	Vext Appointment
M	/OCode	Descriptio	n SiteNam	e WOType	StatusDes	cr Priority		1200	A SL	A SL											App	App
9 a	C	8 0 0	n C	# 	* 0 ¢	=	•	1200	evior	evior											Vext	Vext
Þ		Toner reg	uir Pretoria	SERV	Open			1.000	£	a.												
		test first v		SERV	Open			1300														
		test	Durban	INST	Open																	
		Contract	Clo Pretoria	DR.	Open			1400														
		test	Durban	NDS	Open																	
		Test	Pretoria	INST	Open			1500														
		Android 6		SERV	Open			15_														
		test	Durban	NDS	Open		_	1 6 00														
		This is a n	e Durban	TEST	Open		-	1600														

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.



	_				rk Schedu														_		
-	Home Equipme	ent / Locations	Contract	Finance / HR	Inventor	y I	Maintenan	ce / Proje	ects N	lanufact	uring	Procuren	nent	Sales S	ervice	Reporti	ng Ut	ilities	-	8	2
	Save Layout	0		(+)	Θ					1 🗉		0									
	Workspaces -			~	~	_					_	~		▲:::							
Refresh	Save Filter	Backward			oom Out	Day		Work ek view	Week V			eline	Group by Date	Group by Resource		2					
	mat					_	V.	EK VIEW		iew vi	ew v	ew		NUD By		/					6
		1	NBV1	igate 1		-	[Arrange				Gro	зир ву	/					_	-
Technician	5:			7			4	▶ 05	Decembr	er 2021 -	08 Janua	ry 2022		/							
Drag a colum	n header here to	group by that	column				<u> </u>					,									
3	FullName D	epartment	AvailabilityC	BootStockW St	tus	>			Belir	nda Sharr	man					We	sley Hayr	es			I
3	a[]c a	me Equipment / Locations Contract Finance / HR Save Layout Workspaces at backward Forward Go to Zoom In Today at backward Forward Go to Zoom In Today backward Forward Go to Zoom backwar				•	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat	
	Bianca Du Toit Sa	les	AV	BiancaD Boot A			05/12	6	7	8	9	10	11	05/12	6	7	8	9	10	11	1
	Belinda Shar			A																	
	Wesley Hay		AV	A																	
	Steven Coo		OL	A		1															
	John Twain		AV	A																	
	Theo Peters		AV	A			12	13	14	15	16	17	18	12	13	14	15	16	17	18	3
	Abigail Milne Sa	ales /	AV	A																	
	Mary Thomp			MaryT_Boot A																	
	Sabelo Danisa			A		Λ	к						к	к						Я	1
	Sne Ndwalane Sa	les /	AV	A		4	ㅎ							t							
Inscheduled	Work :						et 19	20	21	22	23	24	nen	19 IS	20	21	22	23	24	nen	
Drag a colum	n header here to	group by that	column				Appointment 61						Appointment	Appointment 61						ointi	
WOCode	Description	SiteName	WOType	StatusDescr	Priority		IS AG						App	is Ap						App	ŧ -
7 100					=	•	evious						Next	evious						Next Appointment	1
	Toper requir	Pretoria	SERV	Open			26	27	28	29	30	31		26	27	28	29	30	31		
															2.						
	test	Durban	INST	Open		-															
	Contract Clo	Pretoria	DR.	Open																	
	test	Durban	NDS	Open																	
	Test	Pretoria	INST	Open			2	3	4	5	6	7	8	2	3	4	5	6	7	8	3
	Android 6 T.	Pretoria	SERV	Open																	
	test	Durban	NDS	Open																	
	This is a ne	Durban	TEST	Open		-															
4					•																

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.



• •	_								Example Com					_ •	
	Home Equipme	nt / Locations	Contract	Finance / HR Inve	ntory	Main	tenan	ce / Projects	Manufacturing	Procurement	Sales Ser	vice Reporting	Utilities	- 8	2
efrech	Save Layout Workspaces 🔻	Backward	Forward Go	to Zoom In Zoom Ou	_	View	1	Work	Full Month	Timeline Grou	p Group by				
			Too				vve		ek View View	View by Da					
Fo	ormat 4		Navi	igate 2				Arra	nge		Group By	2			
Technician	is:														
Drag a colun	nn header here to	roup by that o	column				•	IF US Dece	ember 2021 - 08 J	anuary 2022					
-								Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturda	av
7	FullName De			BootStockW Status			1	05 December	6	7		9	10		- /
			-		λ -			oo becember		· · · · ·			10		
-	Bianca Du Toit Sa		-	BiancaD_Boot A			к								
	Belinda Shar		N	A				12	13	14	15	16	17		
_	Wesley Hay Steven Coo	A	V	A		E	me								
	John Twain	-	V	A		La La	luio	19	20	21	22	23	24		
	Theo Peters	~ ~ ~ ~ ~ ~ ~ ~ ~ ~ ~ ~ ~ ~ ~ ~ ~ ~ ~ ~	V	A	— T	ts e	App					30	31		
	Abigail Milne Sa	× 11	V	Δ		Belinda Sharman	ous								
	Mary Thomp			MaryT Boot A	_	ă	Previous Appointment	26	27	28	29			01 Januar	ary
	Sabelo Danisa		V	A	_		-								
	Sne Ndwalane Sa	es A	V N	A	-			2	3	4	5	6	7		
Inscheduled	Work :		×.,												
				1.											
Drag a colun	nn header here to	group by that o	column	1				05 December	6	7	8	9	10		
WOCode		SiteName	WOType	StatusDescr Prior	ty			1							
9 8 🖸 C	a 🗖 c	a C	R C	* 0 : ` 、 =	•		ĸ	12	13	14	15	16	17		
	Toner requir.	Pretoria	SERV	Open 🔪			nent								
	test first wo.		SERV	Open	-	Wesley Haynes	intr								
	test	Durban	INST	Open		L F	dd	19	20	21	22	23	24		
	Contract Clo		DR	Open		esle	IN SU								ary
	test	Durban	NDS	Open		Ŵ	Previous Appointment	26	27	28	29	30	31	01 Januar	m
	Test	Pretoria	INST	Open			P								
	Android 6 T		SERV	Open				2	3	4	5	6	7		
	test	Durban	NDS	Open	_			2	3	-	5	0	,		
	This is a ne	Durban	TEST	Open	•										
•					•	1									
Doen Windo										User : JulandaK	antining a	Version : 2.5.0.4	1		1

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.



v					Work Sched	uling -	BPO	D: Version	2.5.0.4 - E	xample	Compa	ny v2.5	.0.0							_		×
	Home Equip	ment / Locatio	ns Contract	Finance / H	R Invento	ry	Main	ntenance / F	rojects	Manufac	turing	Procu	remen	nt S	ales	Servic	e Rej	porting	Utilities	_	æ	×
Q	Save Layout	G	•	• •	Q	1	•					⊡ <mark>©</mark> ⊡			2	1						
Refresh	Save Filter			o to Zoom In oday	Zoom Out	Day	Viev	v Work Week Vi	Fi ew Week		onth 1 liew	Timeline View		Date	Group b Resource							
Format Navigate									Arrang	je				Group By						6		
Technici	ans:											Λ										
Drag a co	lumn header here	to group by th	at column				-	4 F	29 Nover	nber 2021	- 11 De	den ber 2	2021									
2 51	FullName	Department	AvailabilityC	BootStockW	Status		Г	Sunday,	28 Novem	ber 2021 ·	Satur	ay, D4 D	ecemb	ber 202	1	Sund	lay, 05 D	ecember 2	2021 - Satu	rday, 11D	ecembe	er :
9		HEC.	88 C	R C	800	-		29 Mon	30 Tue	1 Wed	27h	u 3	Fri	4 Sat	t 55	un	6 Mon	7 Tue	8 Wed	9 Thu	10 Fr	ri
	Bianca Du Toit	Sales	AV	BiancaD_Boot	A																	
~	Belinda Shar		UN	-	A			к														
	Wesley Hay		AV .		A																	5
	Steven Coo	s	OL	1	A																	1
	John Twain	1.	AV		A		E	Appointment			1											1
~	Theo Peters		AV		A		E	it i			1											- tota
	Abigail Milne	Sales .	AV		A		Relinda Sharman	d														1
	Mary Thomp		UN	MaryT_Boot	A		2	evions		/											Alant Americation and	
	Sabelo Danisa		AV .		A		20			1												Alas
	Sne Ndwalane	Sales	AV		A	•		2				1										
Unschedu	ed Work :			×																		
Drag a co	lumn header here	to group by th	at column	1.			L			4												
WOCod	de Descriptio	n SiteNam	e WOType	StatusDe	scr Priority					2:00 PM		8:0	0 AM									
9 allc	8 🗖 C	n C	REC	* 0 0	х. =	•							Г									
۶.	Toner req	uir Pretoria	SERV	Open																		
	test first v	vo Durban	SERV	Open			5															
	test	Durban	INST	Open		· .	Peterson	5														
	Contract (Clo Pretoria	DR	Open			Pot															
	test	Durban	NDS	Open			Theol															
	Test	Pretoria	INST	Open																		
	Android 6	T Pretoria	SERV	Open																		
	test	Durban	NDS	Open																		
	This is a n	e Durban	TEST	Open		-																

BPO.MNU.070

Help v2024.5.0.7/1.0 - Pg 19 - Printed: 21/08/2024

CO3 Technologies (Pty) Ltd © Company Confidential