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

SERVICE

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.

Ribbon Access: Service > Scheduling
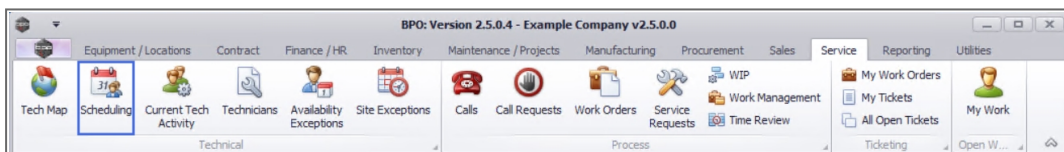
1. The **Work Scheduling** screen will be displayed.

SCHEDULE UNASSIGNED WORK ORDERS

2. Select the **Technician** you wish to assign a Work Order to from the **Technicians** grid.
3. On the **Calendar** grid, navigate to the **date and time** you wish to schedule the work for.
4. Select the work order code you wish to **assign** from the Unscheduled Work grid and **drag** and **drop** the work order to the Technicians calendar.

5. When you receive the **Input Validation** message to confirm;

- **Are you sure you want to schedule this work? Answer 'Yes' to schedule.**

6. Click on **Yes** to schedule the work, or

- Click on **No**, to ignore the request.
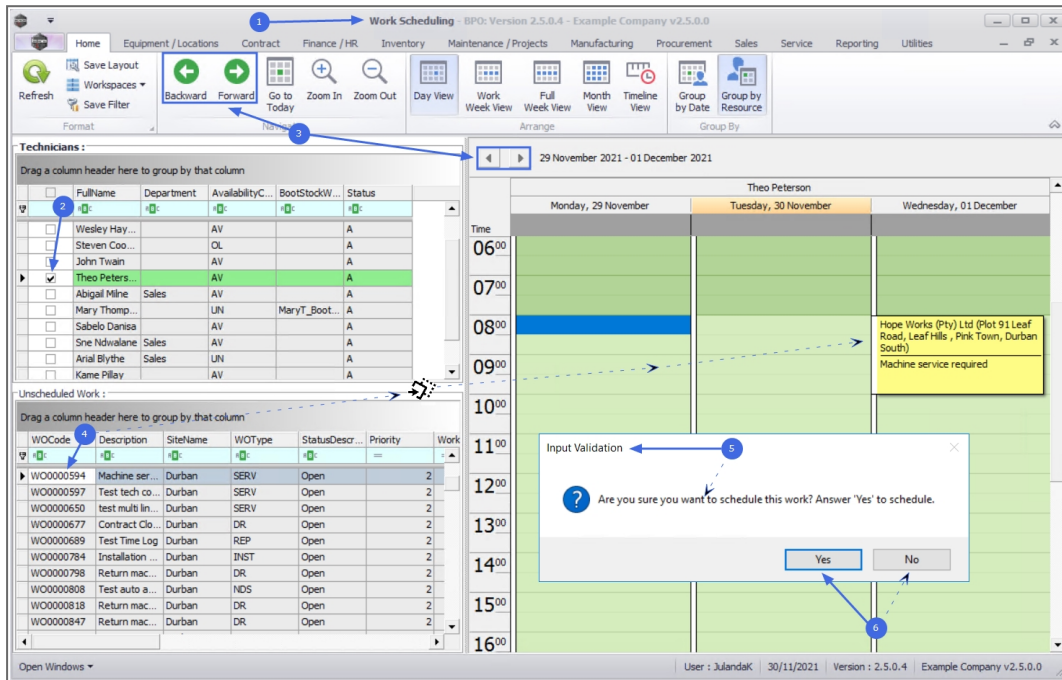
ASSIGNMENT TIME

The duration of the assignment, when first placed on the calendar, will default to what is configured for the <u>Work Order Schedule > Required Craft Estimated Hours</u>.

1. If no Estimated Hours have been configured on the work order, the **default** length will be set to a **2** hour block.
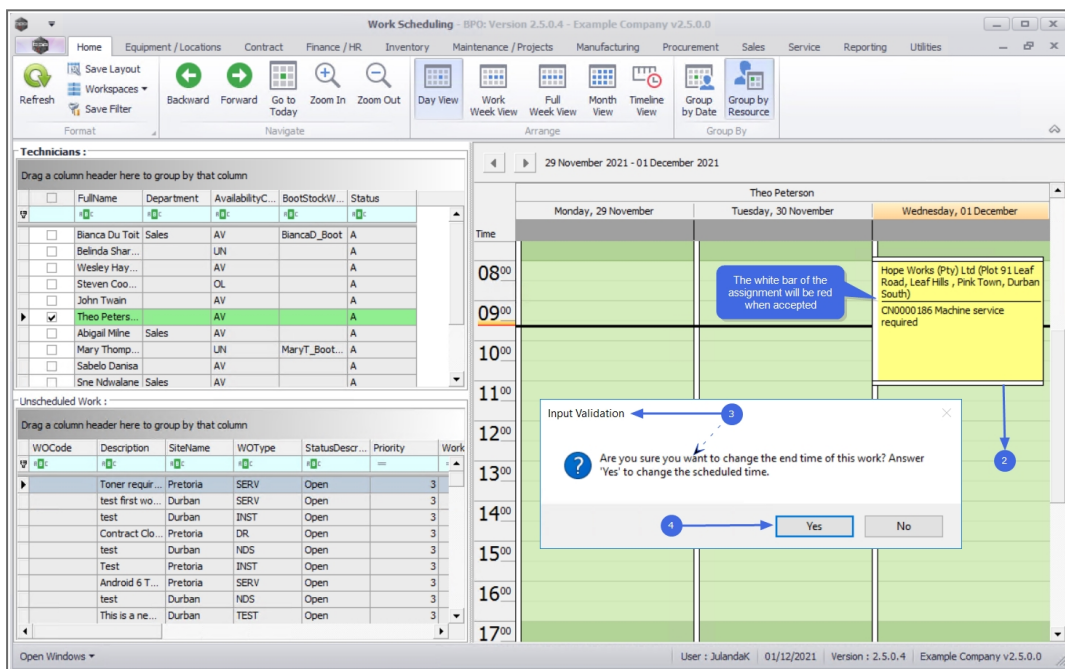
Adjust Assignment Time

2. To change the duration of the assignment, drag the assignment to fit the time required.

3. When you receive the **Input Validation** message to confirm

- **Are you sure you want to change the end time of this work? Answer 'Yes' to change the scheduled time.**

4. Click on **Yes** to change the end time, or

- Click on **No** to ignore the request and leave the end time at the original setting.

> 🖊 **Note** that an assignment **cannot** be changed if it has already been **accepted** by the Technician. The **white bar** on the left of the assignment will change to **red** when accepted.

RESCHEDULE ASSIGNMENT

1. To reschedule a work assignment, **drag and drop** the assignment to the required date and time slot on the technician's calendar.

2. When you receive the **Input Validation** message to confirm;

- **Are you sure you want to reschedule this work? Answer 'Yes' to reschedule.**

3. Click on **Yes**, if you are certain about your selection, or
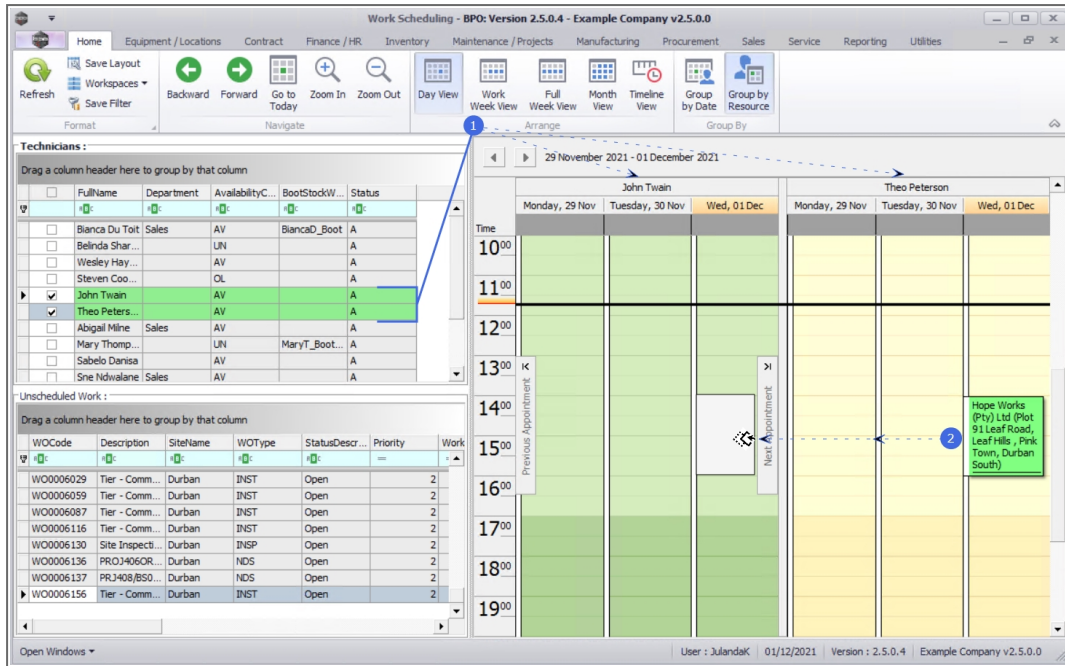   - Click on No to ignore the request and leave the work assignment as originally scheduled.

> 🖉 **Note** that an assignment **cannot** be changed if it has already been **accepted** by the Technician. The **white bar** on the left of the assignment will change to **red** when accepted.

ASSIGN TO ANOTHER TECHNICIAN

1. To move an assignment to a different Technician, ensure that both **Technicians** have been selected in the **Technician grid** to view both calendars.
2. **Drag and drop** the assignment to the required date and time slot for the alternative technician.

3. As you drop the assignment on the new slot,

4. you will receive the **Input Validation** message box to confirm;

   - **Are you sure you want to reschedule this work? Answer 'Yes' to change the reschedule.**
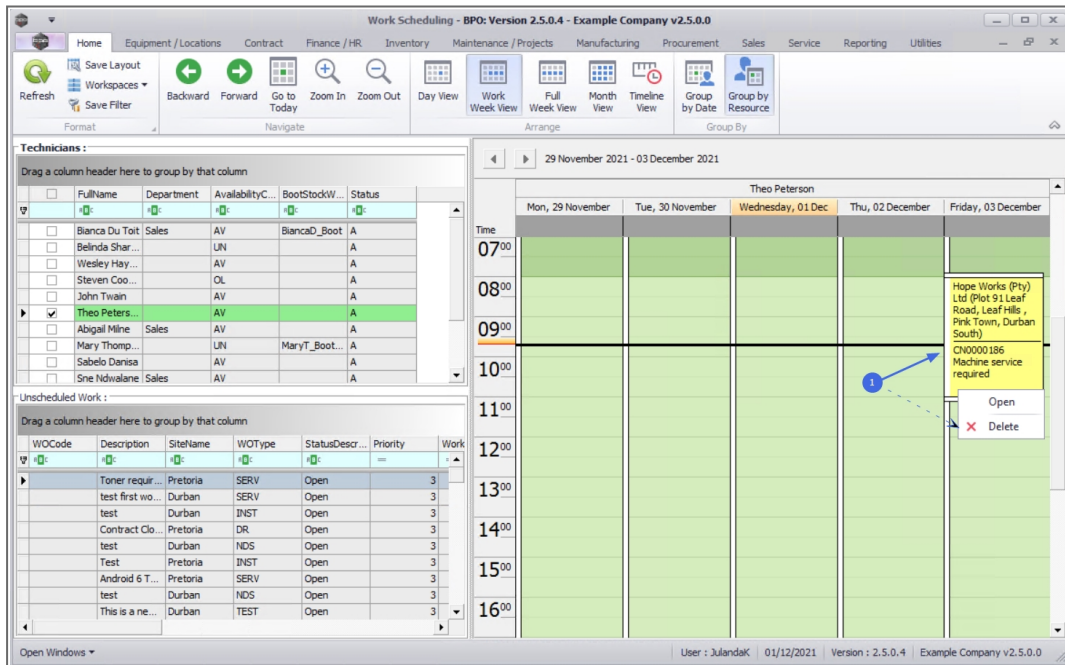
5. Click on **Yes**.

> **Note** that an assignment **cannot** be changed if it has already been **accepted** by the Technician. The **white bar** on the left of the assignment will change to **red** when accepted.
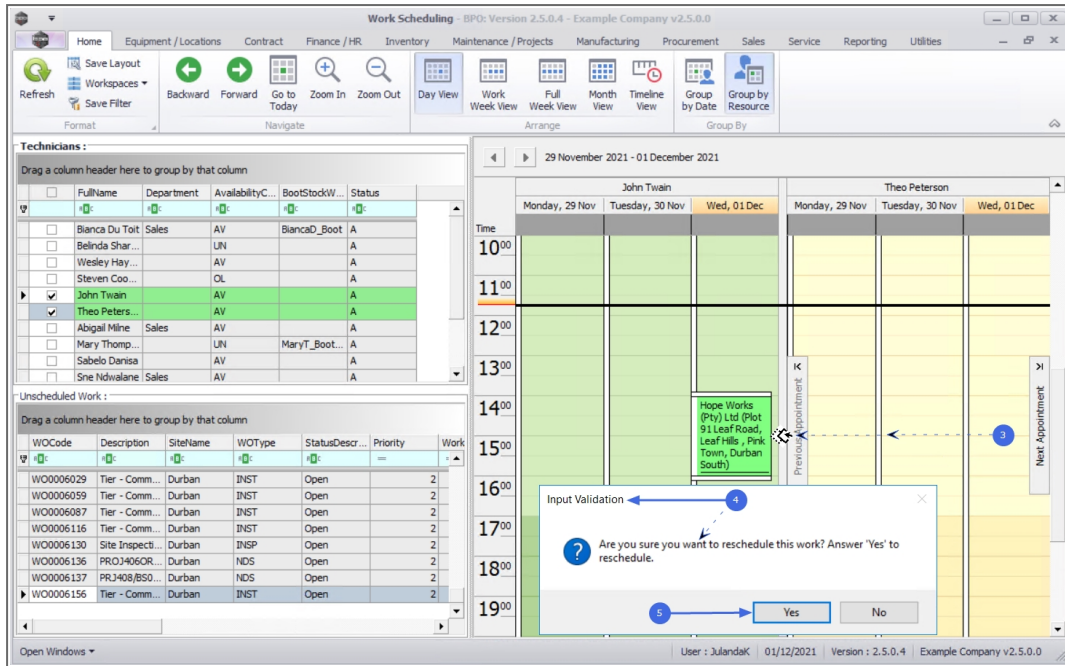
REMOVE/DELETE AN ASSIGNMENT

1. **Right click** on the assignment you wish to remove and then select **Delete**.

2. When you receive the **Deleting** message to confirm;

- **Are you sure you want to delete this assignment?**

3. Click on **Yes** to remove the assignment.

> Note that an assignment **cannot** be changed or deleted if it has already been **accepted** by the Technician. The **white bar** on the left of the assignment will change to **red** when accepted.
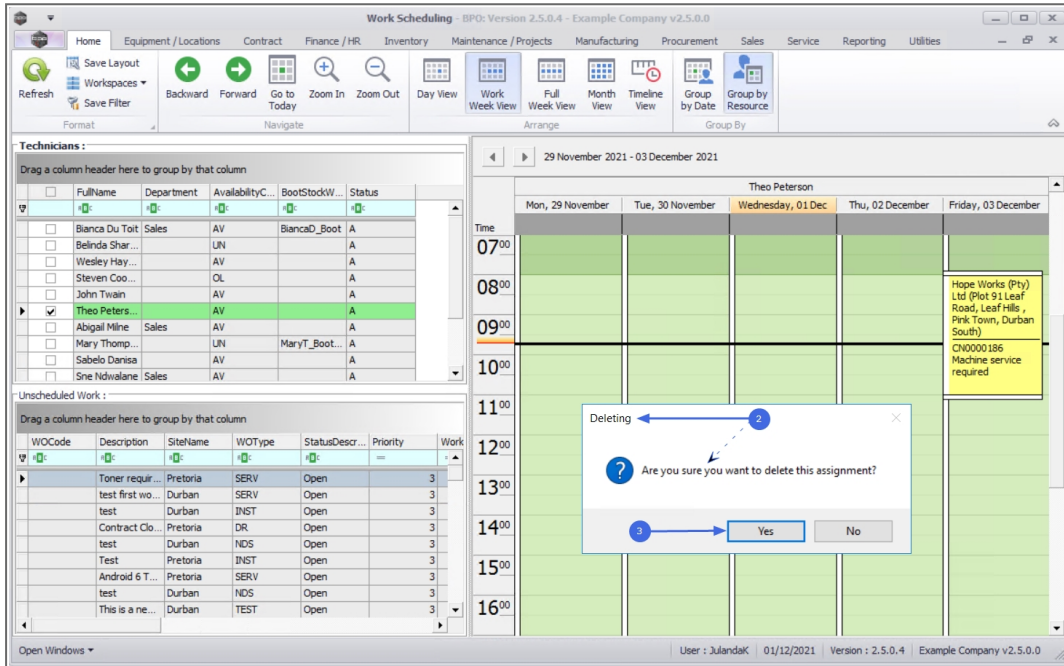
ACCEPT AN ASSIGNMENT

1. When the Technician Accepts the call or project on TechConnect, the **white line** on the **left** of the assignment with turn **red** to indicate that **no** changes can be made to the assignment.

> The Technician will need to continue work on the call or project, until he has End Work
>
> When work has been **completed** - the assignment will be **removed** from the Calendar.

If for some reason, the assignment was accepted, but the Technician is unable to do the work, then he should Reject the Call from TechConnect. The assignment can then be assigned to another Technician.

✎ Note that if a Technician has already **Started Work** on **TechConnect**, then the call cannot be rejected. The Technician will need to **End Work** once done, or **End Work** as **Unresolved**.
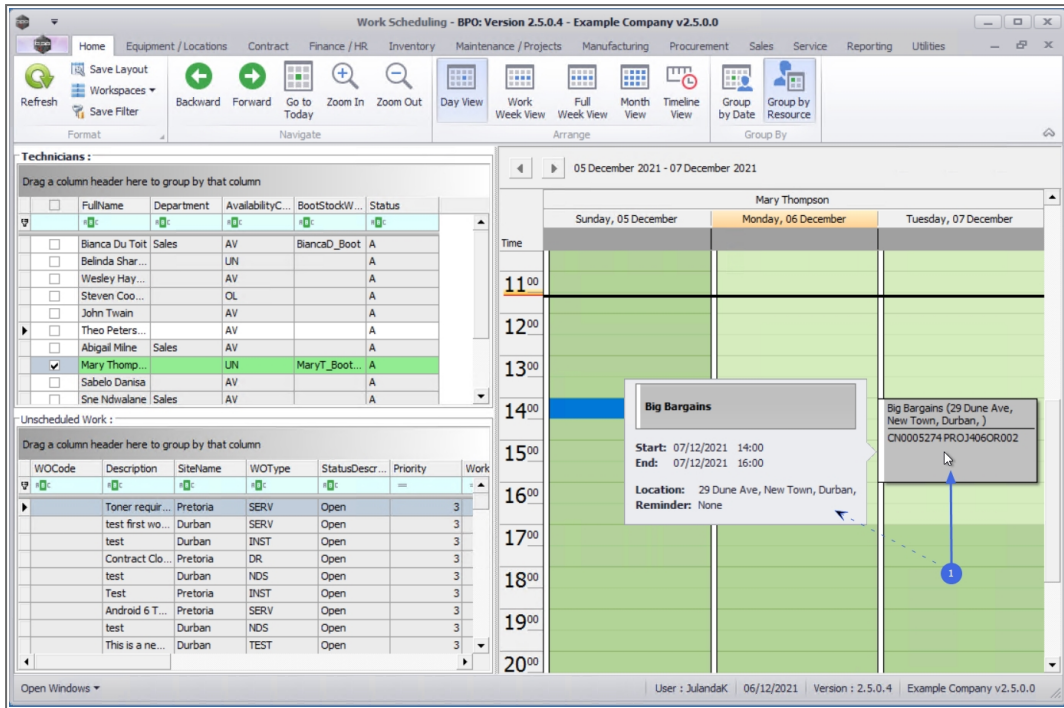

VIEW CALL ASSIGNMENT

From the Work Scheduling screen;

1. **Hover** the mouse over the scheduled assignment to view the **Start** and **End times**, the **Location** and any **Reminders** for the assignment, or

2. To **view** or **edit** the assignment, **double click** on the scheduled assignment.

3. "The Call Assignment: Reference No: [call ref number] screen will be displayed. " on page 4

4. When you are done working on the screen, click on **Save** to update the changes or

   • Click on **Back** to return to the Work Scheduling screen.

MNU.070.001