Calendar

04/22/2025 12:12 pm CDT

Overview

The Calendar module is the core tool for managing your schedule. It includes three views: Month, Week, and Day. In all views, you can download the displayed appointments, drag and drop to reschedule, or click to add new appointments.

This article will review:

- Settings and Navigation
- Month View
- Week View
- Day View
- Agent vs Team Mode
- FAQs

Video Tutorial

Your browser does not support HTML5 video.

Settings and Navigation

Appointment Color Coding

The color of the **timestamp** for appointments in Month and Week views or the **side bar** in Day view indicates the status of the appointment. As you refresh the calendar throughout the day, you can tell which ones are currently in progress, which are complete and which ones are running behind.

- Black -the appointment is scheduled in the future
- Red the start time is now in the past (overdue)
- Orange the appointment is started but not completed
- Green the appointment has been completed



I - James /8/52 lest Service 8 Harrison James Sacey Fakename /8/03 lest Service 7 93 Chevy Chase Dr. Austin TX 78752 578 Main Street Austin TX 78703	3 AM
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Above the Calendar



- Filter: Filter by Service, Service Agent, Accounting Class, Contact Owner (if enabled), and/or GeoZone (this option is not visible on the Day view)
- < and > : Toggle forward and backward one month/week/day at a time.
- Calendar Icon: Jump to a specific date.
- Month/Week/Day: Change how much of the calendar you are viewing at once using these buttons.
- Actions: This menu will vary depending on the view. The Day view has the most options in this menu.
 - **Download:** All views provide the option to download a list of all appointments shown on the calendar in CSV format. Depending on your device, this may open an application like Excel or Numbers and load the data automatically.
 - Load Out Report: Specific to the Day view, this generates a CSV file of parts that service agents will need for the day.
 - **Re-Queue:** On the Day view only, take scheduled appointments and move them back to the Queued status meaning they have a date assigned, but no time or service agent. This is most helpful if you use routing to create your schedules for the day.
 - **Bump:** This option on the Week and Day view gives you the ability to move multiple appointments at once to a new date. This comes in handy in situations like inclement weather that force you to reschedule an entire day worth of appointments.

Below the Calendar



- Appointments: Shows your scheduled and queued appointments for the month.
- Tasks: Displays all tasks that are assigned to users for the month.
- **Timeslots**: Lists all available time slots at the top of each day.
- Queued Confirmations: The checkbox turns on/off confirmation emails for all queued appointments. The hyperlink takes you to a list of those appointments, where you can enable or disable the confirmation emails for each one individually. At the bottom of that list, you'll find a Send or Delete option.
- **Resend Confirmations**: Takes you to a page where you can filter appointments, choose an email template, and resend appointment confirmation emails to contacts.
- Add Time Block: Opens up a set of options to create a time block for one or more Service Agent(s). This is most useful for PTO, staff meetings, or other tasks that occupy time during the day.

Save a View

At the very bottom of the Calendar page, the Month and Week views have the option to save filters and refer back to them quickly.



First, set all filters to create the view you want to save. Then, type the name in the "view name" box and click Save. It will now be saved in the dropdown menu to quickly load whenever you want to refer back to it. Refer to **this article** to learn how to save a view in your Shortcuts menu.

Month View

The Month view displays your entire schedule for the month on one page. Use the arrow buttons at the top to easily navigate to the next or previous month. You can also download all the appointments for the currently visible month. This view has the fewest configurable options, and provides the most general overview of your schedule.



Nov 2024				Filter Cctober December > Image: Month Week Day Actions ▼			
Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	
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3	4 2 12:00a ☐ John Dee 08:00a ☐ Bella Notte	5	6 3 08:00a ☐ Stacey Fakename 08:00a ☐ Stacey Fakename 12:00p ☐ John Doe	Z 08:30a Jane Doe : Call	₿ 3 08:30a ☐ Jane Doe 1155a ☐ Some guy 0:00p Meeting - Bonnie McMurray Bob Smith : Call 12:15p Some guy : Task	2 09:30a 🔲 Bob Smith	
10 08:00a Sunny SideUp : Call	11 08:00a 🛄 🖬 Sunny SideUp	12 08:30a Oli Oksinfree : Call 09:00a Elsa Arendelle : Call	13 2 08:30a Oli Oksinfree 09:00a Elsa Arendelle	14 1 08:00a Dutch Cassidy	15 2 08:00a Stacey Fakename 01:00p Meeting - Bonnie McMurray	<u>16</u>	
Σ	18	19	20 1 12:00p Dob John Doe	21	22 1 01:00p Meeting - Bonnie McMurray 11:45a Bob Smith : Call	23	
24	25 Bonnie McMurray: PTO	26	2Z 1 07:00a Jane Doe	28 Thanksgiving	29 Thanksgiving 1 01:00p Meeting - Bonnie McMurray	30	
Appointments? Tasks? Jefault view name	Timeslots? 21 Queued Confirm	nations Resend Confirmations Add	Time Block			(?	

Week View

The Week view shows seven days of appointments. Several options provide flexibility in how the week is displayed, including the first day of the week and whether it's a single calendar or one per Service Agent. This view also shows Queued/Backlogged appointments that you can use to build your schedule.

Feb 2025					Filter Sliding < >	Month Week Day Actions		
Test User's Week								
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Tutorial Agent's Week								
Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday		
16	1 <u>7</u> 08:00a 🗖 🗖 Luna Azul	18	12	20	21	22		

Below the calendar, you will see the following options that are specific to the Week View:

Mode Split V List V | Print Include Tickets? | Download | Appointments? | Tasks? | Timeslots? | gueued Confirmations | Resend Confirmations | Add Time Block...

- Mode: control how the calendar is displayed with these options.
 - **Combined**: Displays everyone's appointments, tasks, and time blocks on the same page in a traditional week calendar view.
 - Split: Splits each Service Agent into their own weekly calendar. Within Split view, you can choose:
 - List: Lists all appointments for each agent by day (similar to the Month view).
 - Block: Breaks each day down by the hour for each agent (similar to the Combined week view).
 - Team: Displays the weekly schedule by Team.
- **Print**: Generates a PDF with a list of appointments for each agent/team for the week with a checkbox option to "**Include Tickets** which generates a work order sheet for each appointment as part of the PDF.

Day View

The day view provides you with an hour-by-hour breakdown of your agents' schedules for the given day or a quick glance at your team's general daily outline. The arrow buttons at the top allow you to easily change to the next or previous day. You can download each agent's schedule individually.



If you have **Queued Appointments**, which are appointments that do not have a set day and time, they will show on the Day view of the calendar.

Wednesday, February 19, 2025								Month Week Day Actions v
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View Agent 🖲 Layout Horizontal 🔍 | Print 🗈 Include Tickets? | 🔳 28 Queued Confirmations | Resend Confirmations | Add Time Block... | Import Route | Availability Debug

Below the calendar, you will see the following options that are specific to the Day View:

View Agent 🔻 Layout Horizontal 🔻 | Print 🔳 Include Tickets?

- View:
 - Agent: View the day's schedule for each individual agent.
 - Team: View the day's schedule for teams.
- Layout: Choose to view the Day calendar in a Horizontal or Vertical format.
- Import Route: Import a route using a CSV file.
- Availability Debug: Shows remaining available time for the day by service agent.

Agent vs Team Mode

Agent Mode

Agent view mode allows you to print and download individual agent schedules, requeue and bump appointments, optimize routes, and manually set new appointments. The calendar will display times from the earliest available agent or the earliest scheduled appointment, up to the latest. Dragging and dropping appointments updates them in real time and sends confirmation emails if configured. The scheduled time updates to match the highlighted block you drop the appointment on, and only the dropped appointment is adjusted (other appointments remain unchanged).

When dragging and dropping in Agent mode, you're assigning an appointment to a specific agent and time. The highlighted block on the calendar shows when the appointment will start. You may receive a prompt to confirm if you want to adjust the appointment.

Team Mode

For instructions on creating teams, refer to the **Scheduling in Teams Mode** article. Team view mode displays appointments by team (groups of agents) and allows you to reorganize team members. You can also drag and drop appointments in this mode. Changes to team members are saved automatically.

Appointments won't be updated until you click the "Update" button at the bottom of the calendar

This mode also optimizes the start times for appointments to match the lead agent's start time and includes drive time between appointments automatically. The start times will only be updated for teams with modified appointments (indicated by an asterisk next to their names). Other teams' start times won't be adjusted.

Team mode has an additional action called **Snap**, which automatically adjusts appointments for a team or day to the previous appointment's end time, adding appropriate drive time. Appointments with Auto-snap disabled will not be adjusted.

When dragging and dropping in Team view, you're moving an appointment to a set team and a position in the sequence. Appointments for that agent will be snapped to start as soon as possible, factoring in drive time from the previous appointment. Auto-snap-disabled appointments won't be

For more information on Auto Snap and other Scheduling Settings, visit the relevant help pages.

FAQs

Can calendar views be saved?

When on the Calendar, select Week view in the to right corner. Then on the bottom left corner you will see "view." This allows you to see a Team view - a split view that show each person on a team separately, or a combined "view.." The weekly view can't be saved however it is a sticky page and will remain on the page until you change that view.

Why can I see all queued appointments no matter what day I am looking at?

You're not able to limit the queue to certain days when you're on the calendar view, but you can click "Queued Backlog" so that it's turned off. That will only show you future queued appts. But again, it doesn't limit it to a certain time frame. The only place to do that is on the Appointments grid using the filters.

Queued Appointments

Queued Backlog Move..

Why are some of the service agents displaying first on the calendar when they should be displayed later based on sort order/alphabetical order?

The service agents are first grouped by whether or not they are Internal or External (determined by whether or not the Internal box is checked when editing their service agent). External agents (without the box checked) will display first, then all internal agents will display after. Within that grouping they will be ordered by Sort Order first, then by alphabetical order.