

Calendar

12/22/2025 10:08 am CST

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

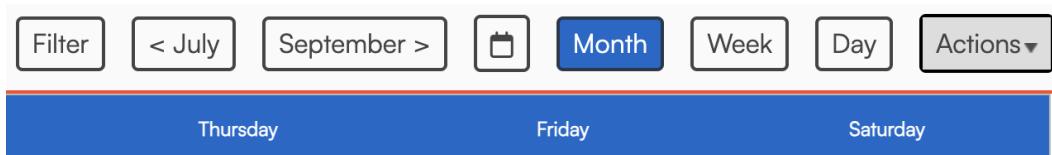
The color of the **timestamp** for appointments in Month and Week views or the **side bar** in Day view indicates the status of the appointment. As you refresh the calendar throughout the day, you can tell which ones are currently in progress, which are complete and which ones are running behind.

- **Blue/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

<u>25</u>	4
10:00a	█ █ Harrison James
11:00a	█ █ Bob Smith
01:00p	█ █ █ John Doe
02:00p	█ █ Stacey
Fakename	

<p> 1 -  10:00a Test Service</p> <p>Harrison James 7493 Chevy Chase Dr. Austin, TX 78752 North Austin Drive 15 mins Qty 1 Dur 1 hour</p>	<p> 1 -  01:00p Test Service</p> <p>John Doe 1234 Easy Street Austin, TX 78746 My Territory, South Austin Drive 15 mins Qty 1 Dur 30 mins</p>
<p> 2 -  11:00a Test Service</p> <p>Bob Smith 7213 Poulain Dr Austin, TX 78738 Drive 45 mins Qty 1 Dur 1 hour</p>	
<p> 3 -  02:00p Test Service</p> <p>Stacey Fakename 5678 Main Street Austin, TX 78703 My Territory, North Austin Drive 35 mins Qty 1 Dur 1 hour</p>	

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

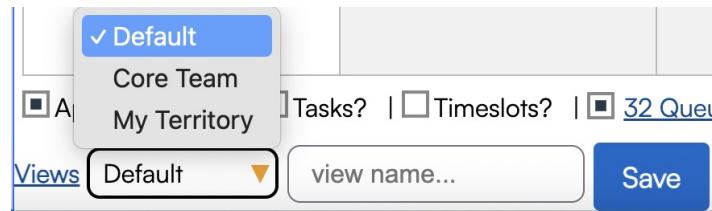
Appointments? | Tasks? | Timeslots? | [32 Queued Confirmations](#) | [Resend Confirmations](#) | [Add Time Block...](#)

- **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

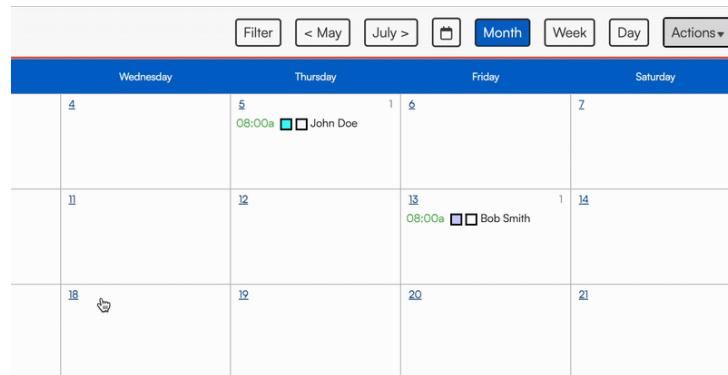
At the very bottom of the Calendar page, the Month and Week views have the option to save filters and refer back to them quickly.



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.

InfoZoom Tooltip

Hover your mouse over an appointment to see a tooltip appear. Click on that tooltip to see an expanded InfoZoom text box. Both of these options provide quick ways to review additional details about appointments on any view of the calendar.



Customize the information in these tools in **Control Panel > Scheduling > Presentation** using [Shortcodes](#).

```
Default Tooltip Template
{contact.name}
{contact.address1}
{contact.city} {contact.zip}
{service.name}
{appointment.date}

Default InfoZoom Template
{contact.name}
{contact.phone}
{contact.address1}
{contact.city} {contact.zip}
{service.name}
{appointment.date}
{service_agent.names}
```

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.



You may find it useful to configure **Calendar Color Blocks** to make it easier to visualize your monthly schedule.

Nov 2024

Filter | < October | December > | | Month | Week | Day | Actions ▾

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
27	28 08:00a Dennis Mitchell	1 29 08:00a Ken Tucky	1 30	1 31 08:00a John Doe 08:00a Brooke Trout 09:30a Harrison James	1 08:00a John Doe 08:00a Barb Dwyer 01:00p Meeting - Bonnie McMurray	3 2
3	4 12:00a John Doe 08:00a Bella Notte	2 5	6	3 7 08:00a Stacey Fakename 08:00a Stacey Fakename 12:00p John Doe	8 08:30a Jane Doe 11:15a Some guy 01:00p Meeting - Bonnie McMurray	3 9 09:30a Bob Smith
10	11 08:00a Sunny SideUp	1 12	13 08:30a Oli Oksinfree 09:00a Elsa Arendelle	2 14 08:00a Butch Cassidy	1 15 08:00a Stacey Fakename 01:00p Meeting - Bonnie McMurray	2 16
17	18	19	20 12:00p John Doe	1 21	22 01:00p Meeting - Bonnie McMurray	1 23
24	25 Bonnie McMurray: PTO	26	27 07:00a Jane Doe	1 28	29 01:00p Meeting - Bonnie McMurray	1 30

Appointments? | Tasks? | Timeslots? | 32 Queued Confirmations | [Resend Confirmations](#) | [Add Time Block...](#)

Views

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.

Dec 2024

Filter | Sliding | < | > | | Month | Week | Day | Actions ▾

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
1 08:00a Barb Dwyer	1 2 11:45a Bob Smith	1 3 10:30a John Doe	1 4 12:00p John Doe	1 5 08:00a Anna Arendelle 08:00a Anna Arendelle	2 6 Bonnie McMurray: Meeting (1p-2p) Wylie Coyote	1 7 08:00a Wylie Coyote 08:00a Wylie Coyote 09:00a Wylie Coyote 09:30a Wylie Coyote 10:00a Wylie Coyote

Mode Include Tickets? | [Download](#) | Appointments? | Tasks? | Timeslots? | 32 Queued Confirmations | [Resend Confirmations](#) | [Add Time Block...](#)

Views

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

- **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.

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

- **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 moved.

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 top right corner. Then on the bottom left corner you will see "view.." This allows you to see a Team view - a split view that shows each person on a team separately, or a combined "view.." 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.

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