

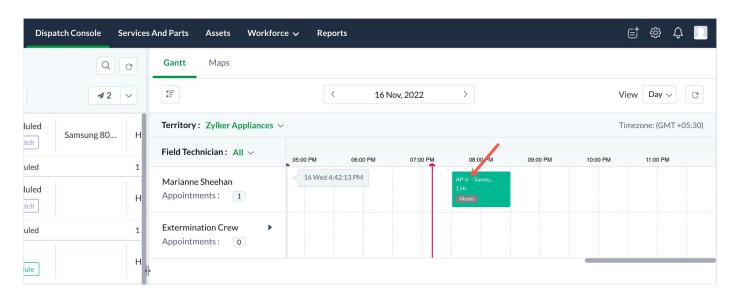
# **Dispatch Console Customization**

You can customize the details in the service appointment bar in the Gantt view of the Dispatch Console and the appointment entry in the Grid view of the Dispatch Console and the Service Resource Calendar. The service resource calendar can be seen in the *Users Details* page, *Crew Details* page, and the *Service Resource Details* popup in the Gantt view of the Dispatch Console.

#### **Gantt View**

You can customize the service appointment bar in the Gantt view of the Dispatch Console. You can choose the appointment parameters that you want to see in the appointment bar and the order in which you want them to be displayed. By default, the following parameters will be displayed in the appointment bar:

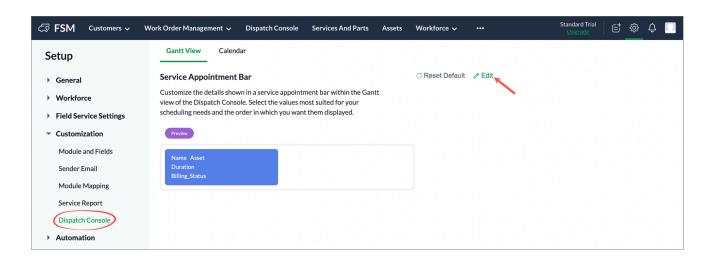
- Appointment name
- Asset used in the appointment
- Duration of the appointment
  - Scheduled duration if the appointment hasn't started
  - Actual duration if the appointment has started
- Billing status of the appointment



To customize the service appointment bar:

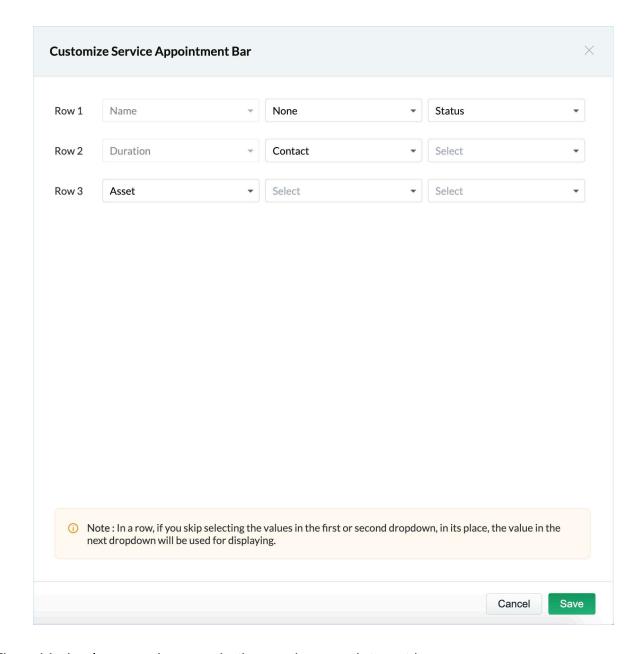
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1. Navigate to **Setup > Customization > Dispatch Console**. Select the **Gantt View** tab and click **Edit**.

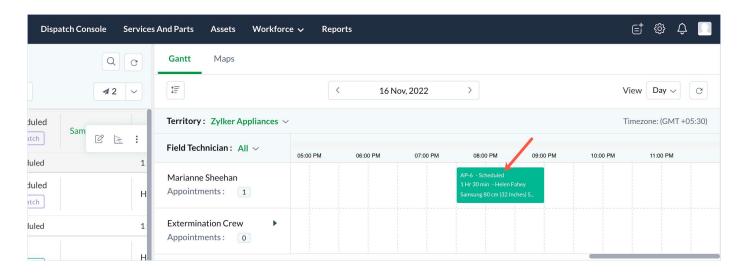


2. In each row, select the parameters whose values you want to see in the appointment bar. Click **Save**.

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The added values can be seen in the service appointment bar.



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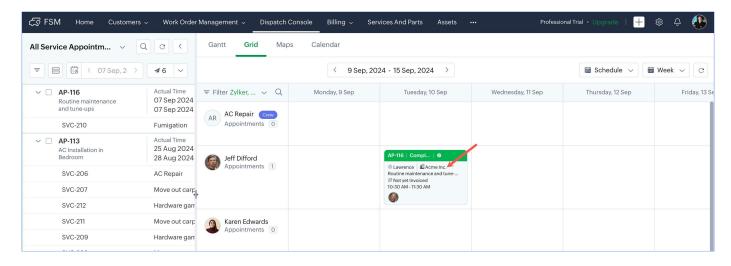
#### Note:

- If you do not select a value in the first or second dropdown, the parameter, if any, present in the subsequent dropdown will be used.
- If for an appointment, the value is not present for a selected parameter, then there are two possibilities:
  - The value of the next parameter, if present, will be displayed
  - That position will be left empty
- The parameters Name and Duration are not editable.

#### **Grid View**

You can customize the service appointment entries in the Grid view of the Dispatch Console. You can choose the appointment parameters that you want to see in the entry and the order in which you want them to be displayed. By default, the following parameters will be displayed in the service appointment entry:

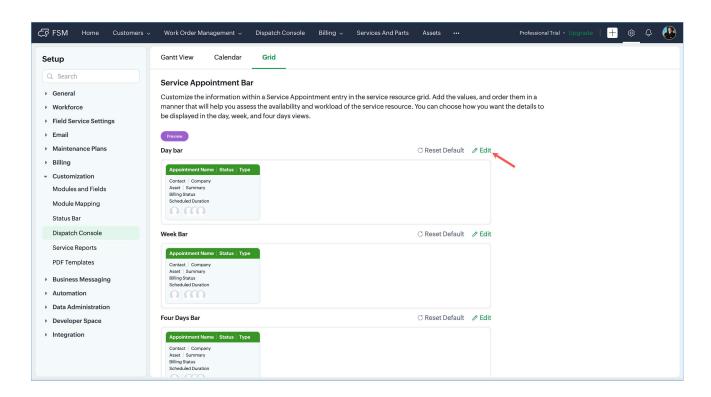
- Appointment Name, Status and Type in the heading. You can choose the Type to be shown as an icon or text.
- Contact (if present) and Company (if present) for whom the appointment is created
- · Asset used in the appointment
- Summary of the appointment
- Billing status of the appointment
- Scheduled Duration of the appointment



To customize the service appointment entry:

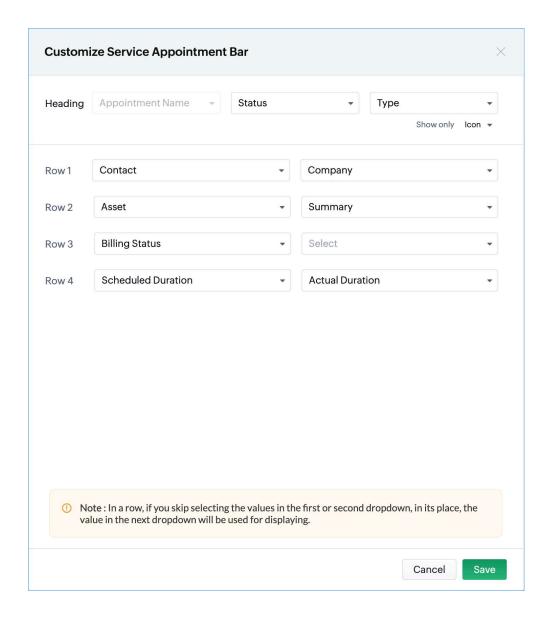
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1. Navigate to **Setup > Customization > Dispatch Console**. Select the **Grid View** tab and click **Edit**.

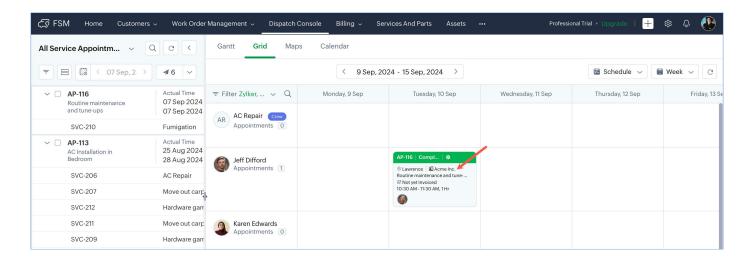


2. In each row, select the parameters whose values you want to see in the appointment entry. Click **Save**.

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The added values can be seen in the service appointment entry.



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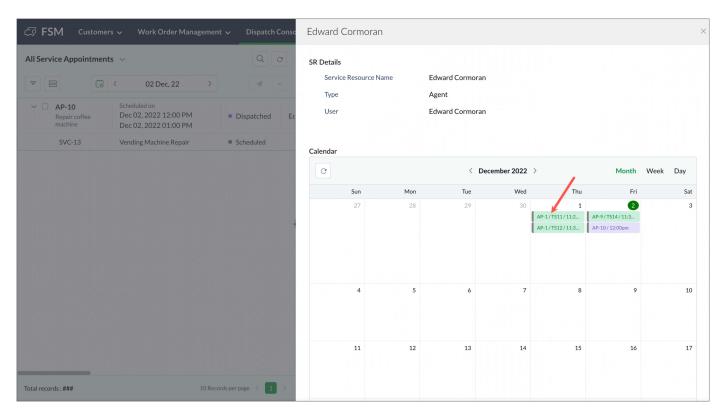
#### Note:

- If you do not select a value in the first or second dropdown, the parameter, if any, present in the subsequent dropdown will be used.
- If for an appointment, the value is not present for a selected parameter, then there are two possibilities:
  - The value of the next parameter, if present, will be displayed
  - That position will be left empty
- The parameter Name is not editable.

#### Service Resource Calendar

You can customize the service appointment entry in the Service Resource Calendar, wherever it is used. You can choose the appointment parameters that you want to see in the entry and the order in which you want them to be displayed. By default, the following parameters will be displayed in the service appointment entry:

- Appointment Name/Time sheet ID (if present)
- Start **Time** of the appointment
  - Scheduled Start Time if the appointment hasn't started
  - Actual Start Time if the appointment has started
- Asset used in the appointment (applicable only for the entries in the Day view)

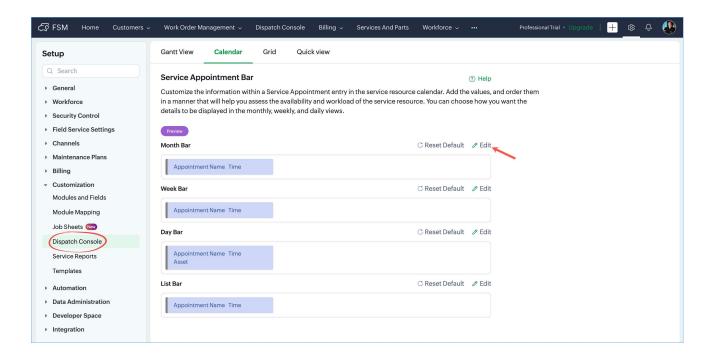


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To customize the service appointment entry:

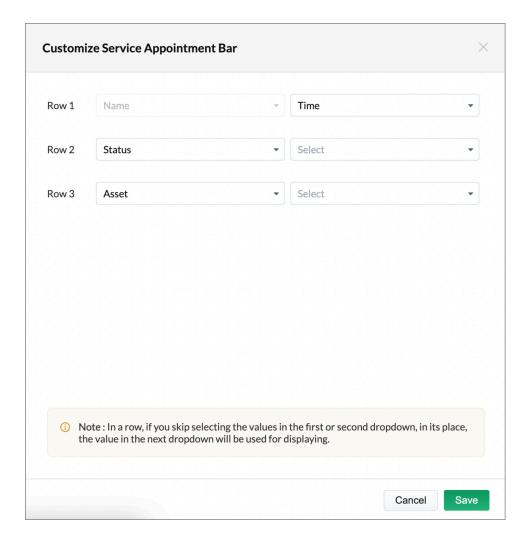
1. Navigate to **Setup > Customization > Dispatch Console**. Select the **Calendar** tab and click **Edit**.

You can customize the entries in the Month, Weekly, Day, and List views of the calendar.

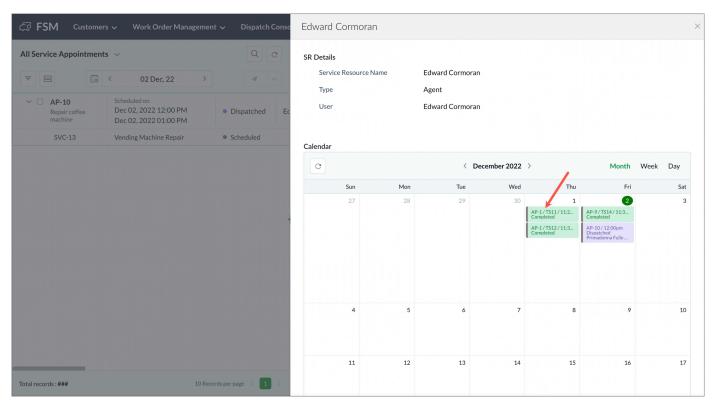


2. In each row, select the parameters whose values you want to see in the appointment entry. Click **Save**.

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The added values can be seen in the service appointment entry.



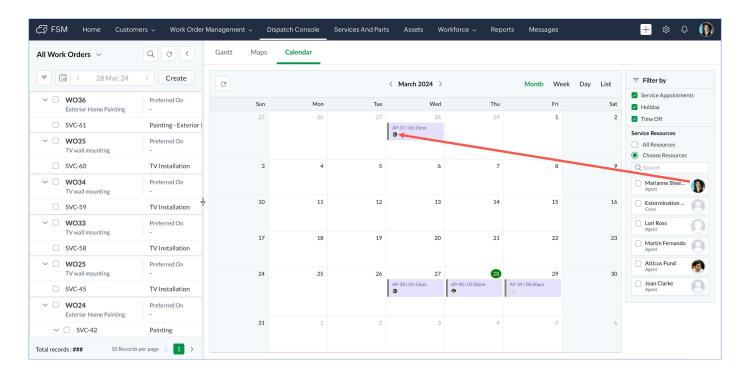
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#### Note:

- If you do not select a value in the first dropdown, the parameter, if any, present in the subsequent dropdown will be used.
- If for an appointment, the value is not present for a selected parameter, then there are two possibilities:
  - The value of the next parameter, if present, will be displayed
  - That position will be left empty
- The parameter Name is not editable.

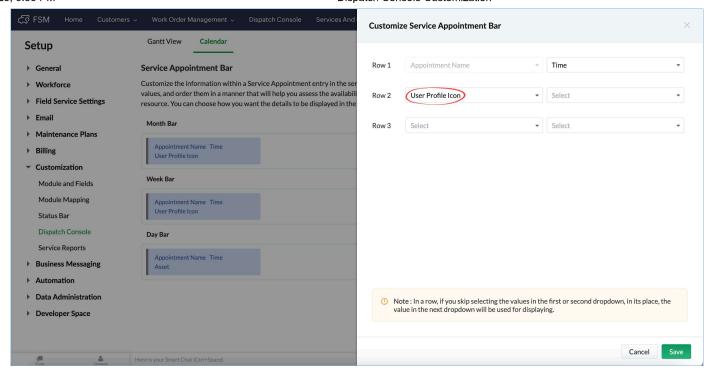
### **Identify Appointments Using Field Agent's Profile Image**

You can include the image of the field agent in the service appointment entry in the Service Resource Calendar.

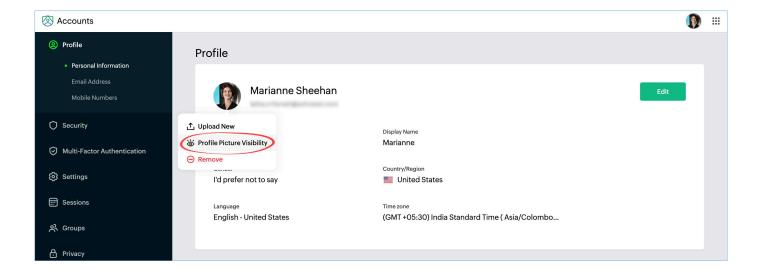


To do so, select the parameter **User Profile Icon** while customizing the service appointment entry.

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Ensure that you have chosen the suitable option for **Profile Picture Visibility** in the field agents's Accounts settings. If you choose the option **Only myself**, your profile picture will not be visible to anyone else.



## **Service Appointment Quick View**

You can customize the details that are shown in the popover displayed on hovering over the service appointment entries in the Gantt, Grid, and Calendar views of the Dispatch Console. You can choose the details that you want to see and the order in which you want them to be displayed. By default, the following parameters will be displayed:

- Appointment name
- Summary of the appointment

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- Status of the appointment
- Billing status of the appointment

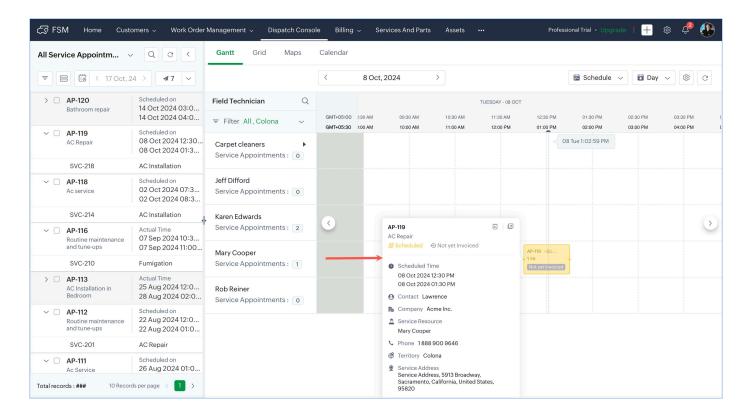
To customize the service appointment quick view popover:

- Navigate to Setup > Customization > Dispatch Console. Select the Quick View tab and click Edit.
- 2. Click **+ New line** to add an entry and select the value you want displayed in the quick view. You can rearrange [ii] or remove [iii] these entries. Click **Save**.

  If you add an entry without selecting a value, it won't be saved.

Use the toggle switch **Enable/disable the quick view for appointments** to display/hide the quick view for appointments. Select the value in **Timeout in millisecond after which the popover will be hidden after mouse out** after which you want the quick view popover to disappear. Based on the value you choose in **Event for which the quick view will be shown**, the quick view popover will be shown on mouseover of the service appointment bar or mouse click of the service appointment bar.

The added values can be seen in the quick view of a service appointment entry.

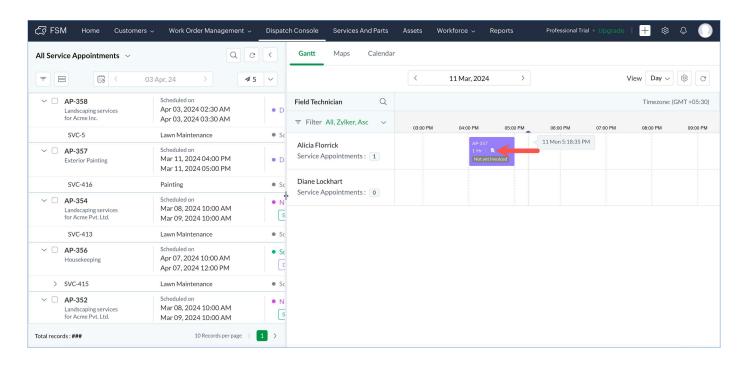


### **Identify Appointments Using Icons**

In the service appointment entries in the Gantt, Grid and Calendar views of the Dispatch Console, you can include the icon that is assigned to the **Type** field of a service appointment.

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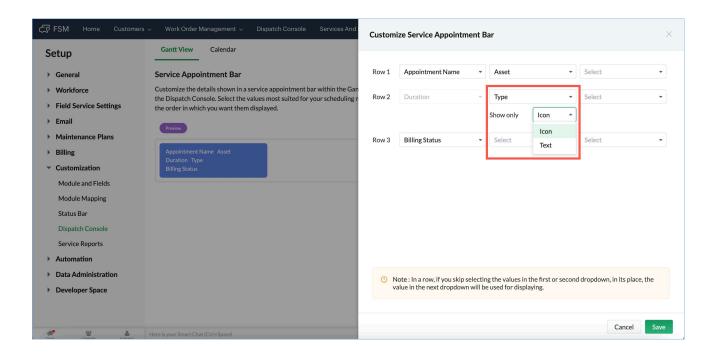
The value of the Type field in the service appointment will be taken from the parent work order unless the value of the Type field is changed while creating the service appointment.



To do so, follow the steps below:

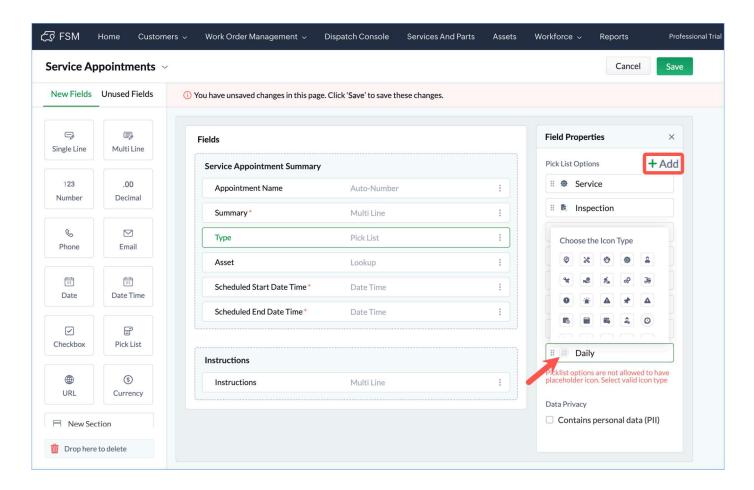
- 1. Navigate to Setup > Customization > Dispatch Console.
- 2. Select the desired view (Gantt View, Calendar) and click **Edit**.

  In the Calendar view, you can customize the entries in the Month, Weekly, and Day views.
- Choose Type in the dropdown corresponding to the position where you want the icon to be displayed. In the Show only dropdown, select Icon.



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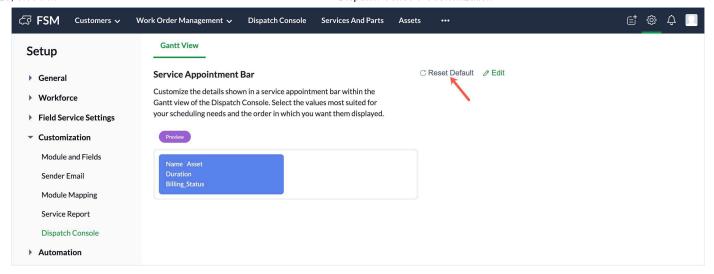
You can choose the icons for the values in the Type field of the service appointment module in the *Module Builder* (**Setup** > **Customization** > **Module and Fields**). The standard values of the Type field will have some icons assigned by default. To change it, click on the icon and select a new one from the icon gallery. You can also add new values to the Type field. Click +Add and enter the name of the new Type and click on the placeholder icon [ ] to open the icon gallery. Choose the desired icon.



### **Reset Settings**

You can reset the settings for the service appointment bar or entry to its default values. Click **Reset Default** to do so. Select **Reset** in the confirmation message to continue.

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https://help.zoho.com/portal/en/kb/fsm/customize-field-services/articles/dispatch-console-customization

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