

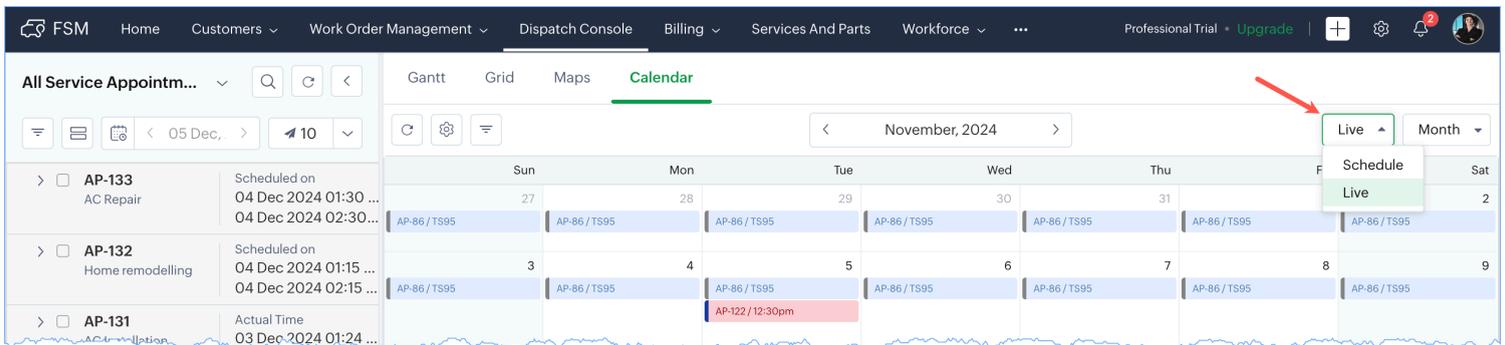


Dispatch Console Calendar

In the **Calendar** view, you can view all the appointments to which service resources have been assigned, Holidays in the organization, and the Time Off taken by the resources. You can view all the service appointments on a day irrespective of the service resources or territories. You can also see the details using the Month, Week, Day, and List views.

Calendar Filters

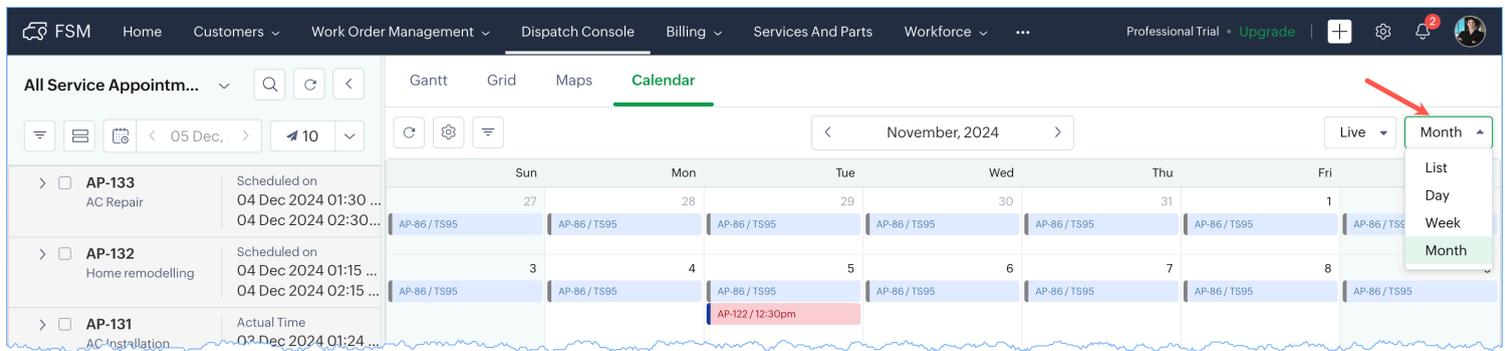
Appointment Date/Time: In this filter, if you select **Schedule**, then the entries for service appointments will be shown at the times that correspond to their Scheduled Date/Time. If you select **Live**, then the entries for service appointments will be shown at the Actual Date/Time of the service appointments if there is an Actual Date/Time present for the service appointment, else they will be shown at the times that correspond to their Scheduled Date/Time. Service appointments will have an Actual Date/Time only after the work has started, i.e. for service appointments with status In Progress or after.



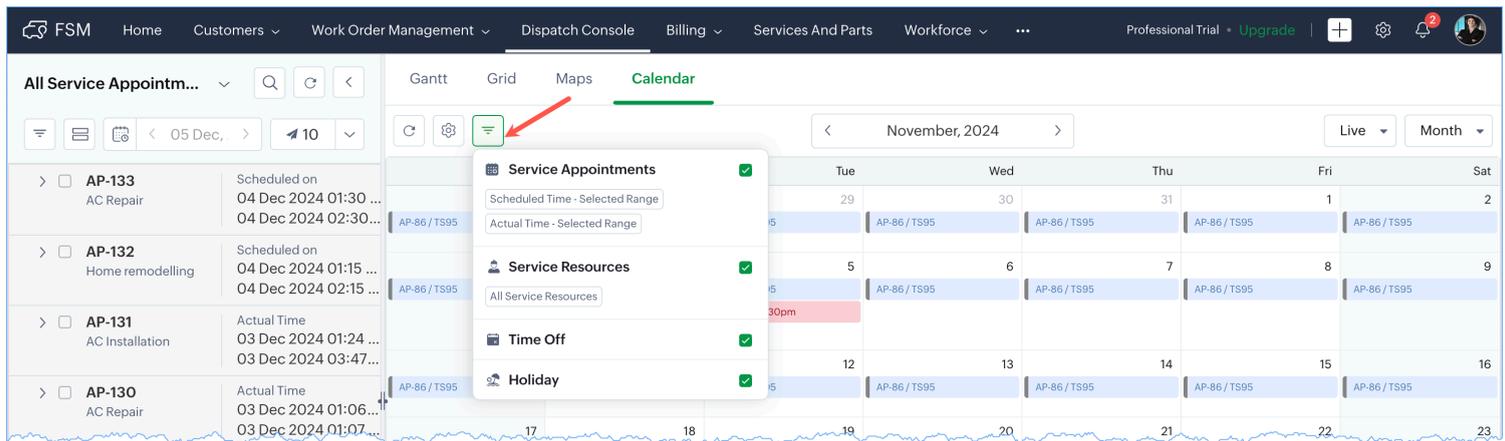
Time Interval: This filter will allow you to select different time intervals for viewing the service appointments:

- Month
- Week
- Day
- List

Based on the time interval, the value in the date picker in the middle of the calendar view will change.



Click on  to use the following filters. Depending on the data you want to see, select or uncheck the respective checkboxes.



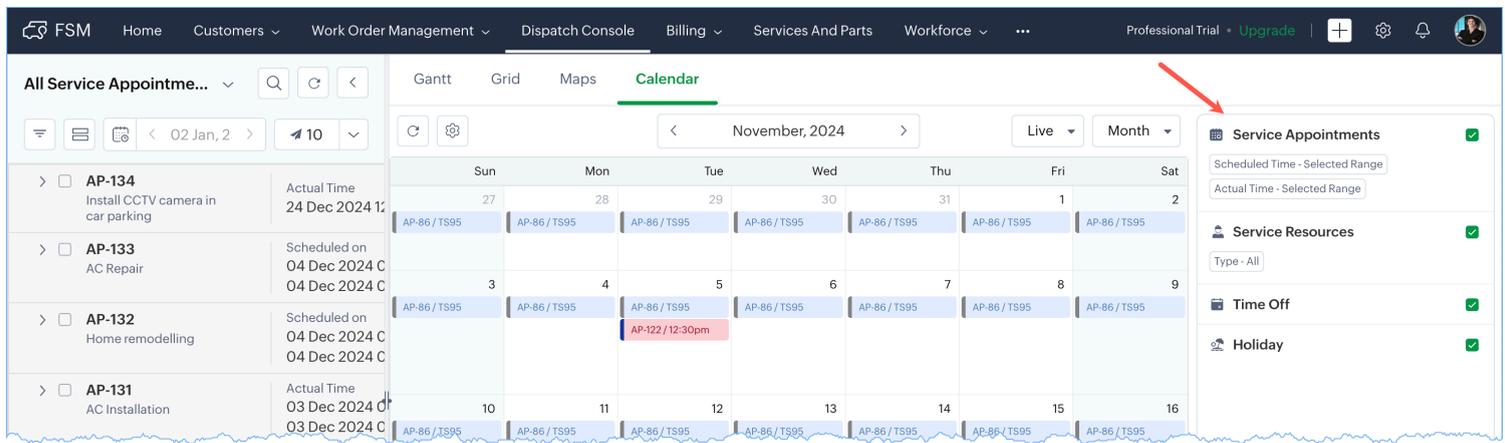
Service Appointments: Click to change the filter criteria. Click **Edit** and change the filters as required and click **Apply**. For any date filter selected, the date range considered will be the one chosen in the date picker in the middle of the calendar view.

Service Resources: Click to change the filter criteria. Select the service resources whose service appointments you want to view. Click **Edit** and choose additional filters as required and click **Apply**.

Time Off: All the time off taken by the service resources will be listed. Unselect the checkbox if you do not want the time off entries to be listed in the calendar.

Holiday: All the holidays added in the organization will be listed. Unselect the checkbox if you do not want the holidays to be listed in the calendar.

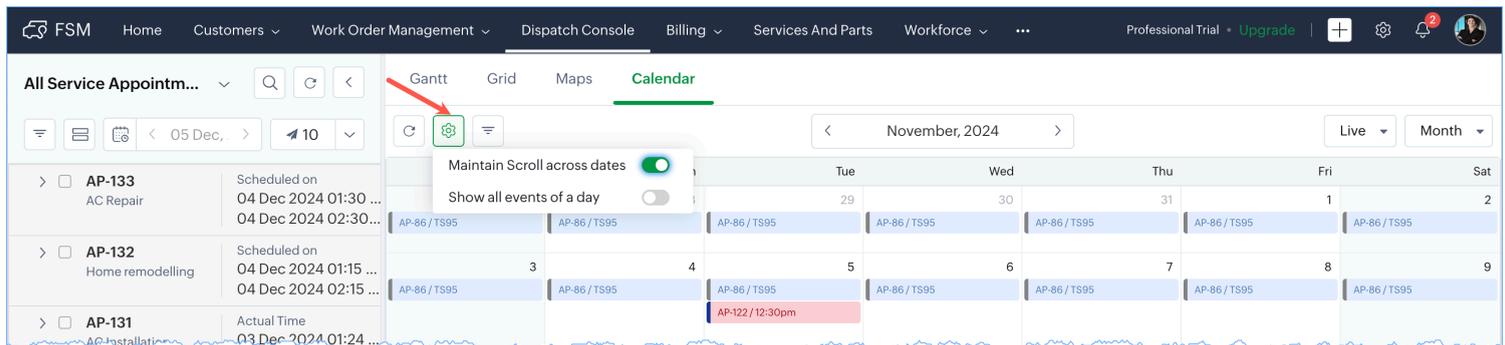
You can also see these filters in a side pane on the right side. The filters will be displayed either in a side pane on the right or as an icon, depending on the width of the calendar area.



Calendar Settings

There are certain settings that you can configure in the Calendar view of the dispatch console. Click on the **Settings** [] icon in the top right corner to see these options:

- **Maintain Scroll across dates:** Use this to maintain the scroll position across dates; otherwise, the scroll will revert to the start of the business hours. This is applicable only for the Week and Day views.
- **Show all events of a day:** If you enable this, all the service appointments for a day will be shown in the Month view; otherwise, only two service appointments will be shown with the +more option.



Create an appointment through drag and drop

You can create service appointments in the following ways:

- Drag and drop a work order
- Drag and drop a service of the work order

To create an appointment through drag and drop:

1. Click Create in the [Work Orders List](#).

Work orders can also be created from the [Work Orders](#) module.

All Work Orders ▼ 🔍 🔄

☰ 📅 < 01 Sep, 22 > Create

<input checked="" type="checkbox"/> WO33 Sundry repairs	Preferred On -	● Dispatched	-None-
<input type="checkbox"/> SVC-83	Extermination	● In Progress	
<input type="checkbox"/> SVC-84	Leakage Repair	● In Progress	
<input type="checkbox"/> SVC-85	Plumbing	● In Progress	
<input checked="" type="checkbox"/> WO32 Bathroom floor repair	Preferred On Aug 08, 2022 - Aug 09, 2022 Morning	● Cancelled	-None-
<input type="checkbox"/> SVC-77	Leakage Repair	● Completed	
<input type="checkbox"/> SVC-78	Extermination	● Completed	

2. In the *Create Work Order* overlay, enter the necessary [details](#) and click **Save**.

The work order will be created and listed in the *Work Orders List*. You can now create service appointments for this work order.

Drag and drop a work order

1. Drag and drop the work order to the desired point in the Calendar that corresponds to the time for which you want to schedule the appointment.

When you select the work order, all its services will be automatically selected. You can uncheck the services you want to exclude from the appointment.

FSM Customers ▼ Work Order Management ▼ Dispatch Console Services And Parts Assets Workforce ▼ ... Standard Trial Unsubscribe 🔍 ⚙️ 🔔 👤

All Work Orders ▼ 🔍 🔄

☰ 📅 < 06 Dec, 22 > Create

<input checked="" type="checkbox"/> WO9 Bathroom repair	Preferred On -	● New
<input type="checkbox"/> SVC-14	Plumbing	● New
<input type="checkbox"/> SVC-15	Leakage repair	● New
<input checked="" type="checkbox"/> WO8 Repair coffee machine	Preferred On -	● Scheduled...
<input type="checkbox"/> SVC-13	Vending Machine Repair	● Scheduled
<input checked="" type="checkbox"/> WO7 Carpet stain	Preferred On -None-	● In Progress
<input type="checkbox"/> SVC-12	Move out carpet cleaning	● Completed
<input checked="" type="checkbox"/> WO6 Carpet stain	Preferred On -	● In Progress
<input type="checkbox"/> SVC-9	Move out carpet cleaning	● Completed
<input checked="" type="checkbox"/> WO5 Clogged drain pipe	Preferred On -	● In Progress
<input type="checkbox"/> SVC-5	Plumbing	● Completed

Total records: ### 10 Records per page < 1 >

Gantt Maps **Calendar**

All Calendar Service Appointments Holiday Time Off

🔄 < Dec 4 - 10, 2022 > Week Day

	4 Sun	5 Mon	6 Tue	7 Wed	8 Thu	9 Fri	10 Sat
All Day							
12 PM							
1 PM							
2 PM							
3 PM							
4 PM							

2. In the *Create Appointment* overlay, the following details will be populated, which you can change if required.

- a. Service
 - b. Summary
 - c. Scheduled Start/End Date Time
3. Select a **Service Resource** (Agent or Crew)
 4. Click **Schedule** or **Schedule and Dispatch** to continue.

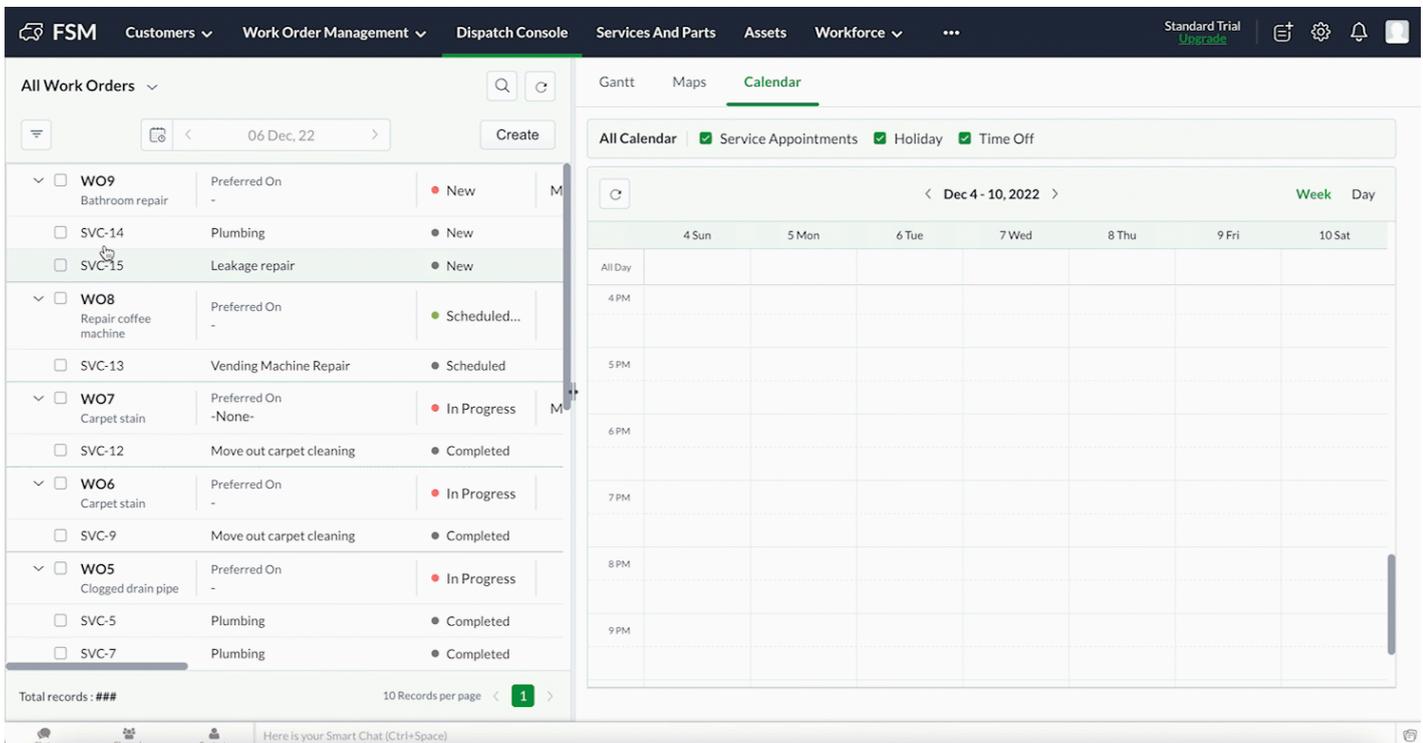
The screenshot displays the 'Create Appointment' dialog in the FSM interface. On the left, a list of work orders is visible, including WO9 (Bathroom repair), WO8 (Repair coffee machine), WO7 (Carpet stain), WO6 (Carpet stain), and WO5 (Clogged drain pipe). The 'Create Appointment' dialog is open, showing the following details:

- Choose WorkOrder:** WO9-Bathroom repair
- Work Order Details:** WO9 Bathroom repair, New Service, Edward Cor...
- Service:** Plumbing (SVC-14) (New, Quantity: 1) and Leakage repair (SVC-15) (New, Quantity: 1)
- Summary:** Bathroom repair
- Asset:** Search Asset
- Scheduled Start Date Time:** Dec 06, 2022, 12:30 PM
- Scheduled End Date Time:** Dec 06, 2022, 01:30 PM
- Service Resource:** Lucy Robins

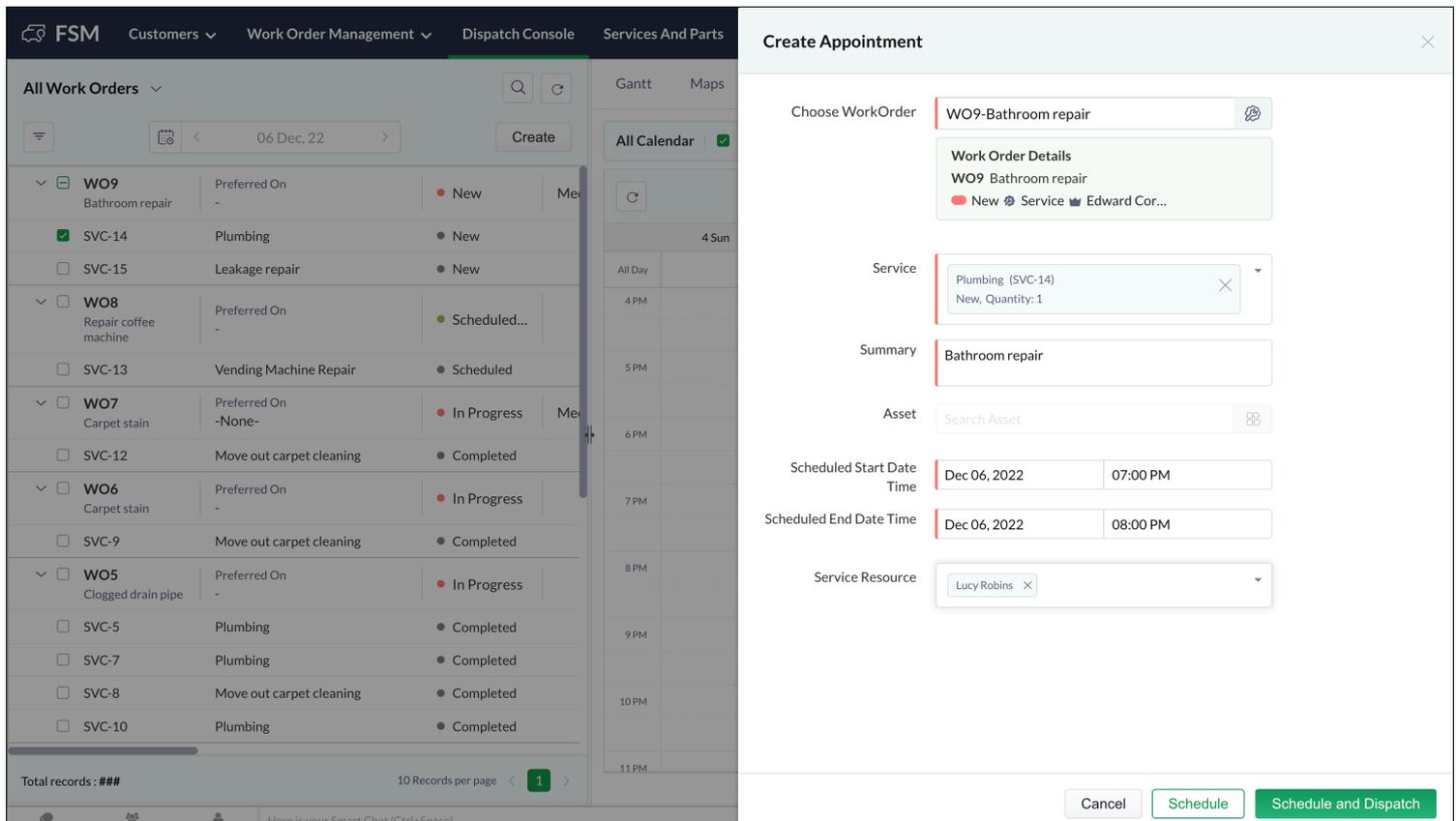
At the bottom of the dialog, there are three buttons: 'Cancel', 'Schedule', and 'Schedule and Dispatch'.

Drag and drop a service of the work order

1. Drag and drop the service to the desired point in the Calendar that corresponds to the time for which you want to schedule the appointment.



2. In the *Create Appointment* overlay, the following details will be populated, which you can change if required.
 - a. Service
 - b. Summary
 - c. Scheduled Start/End Date Time
3. Select a **Service Resource** (Agent or Crew)
4. Click **Schedule** or **Schedule and Dispatch** to continue.



Note:

As shown in the screenshot below, you can drag and drop by clicking anywhere in the row corresponding to the work order or service.

✓	WO9 Bathroom repair	Preferred On -	New
✓	SVC-14	Plumbing	New
✓	SVC-15	Leakage repair	New

Create Appointments from Calendar

You can create appointments directly from the Calendar. To do so:

1. Click on the point in the Calendar that corresponds to the time for which you want to schedule the appointment.
2. In the *Create Appointment* overlay, choose the work order for which you want to create the appointment.

The screenshot displays the Zoho FSM Dispatch Console interface. On the left, a list of work orders is shown, including WO9 (Bathroom repair), SVC-14 (Plumbing), and SVC-15 (Leakage repair). On the right, a calendar view is active for the week of December 4-10, 2022, with a time slot from 9 AM to 1 PM. The interface includes navigation tabs for Gantt, Maps, and Calendar, and a search bar at the top.

3. In the *Create Appointment* overlay, the following details will be populated, which you can change if required.
 - a. Service
 - b. Summary
 - c. Scheduled Start/End Date Time
4. Select a **Service Resource** (Agent or Crew)
5. Click **Schedule** or **Schedule and Dispatch** to continue.

The screenshot displays the FSM Dispatch Console interface. On the left, a list of work orders is visible, including WO9 (Bathroom repair), SVC-14 (Plumbing), SVC-15 (Leakage repair), WO8 (Repair coffee machine), SVC-13 (Vending Machine Repair), WO7 (Carpet stain), SVC-12 (Move out carpet cleaning), WO6 (Carpet stain), SVC-9 (Move out carpet cleaning), WO5 (Clogged drain pipe), SVC-5 (Plumbing), SVC-7 (Plumbing), SVC-8 (Move out carpet cleaning), and SVC-10 (Plumbing). The right side shows a calendar view for December 7, 2022, with a 45-minute appointment slot highlighted. The 'Create Appointment' modal is open, allowing for the configuration of a new appointment based on the selected work order.

Reschedule through drag and drop

You can reschedule an appointment in the following ways:

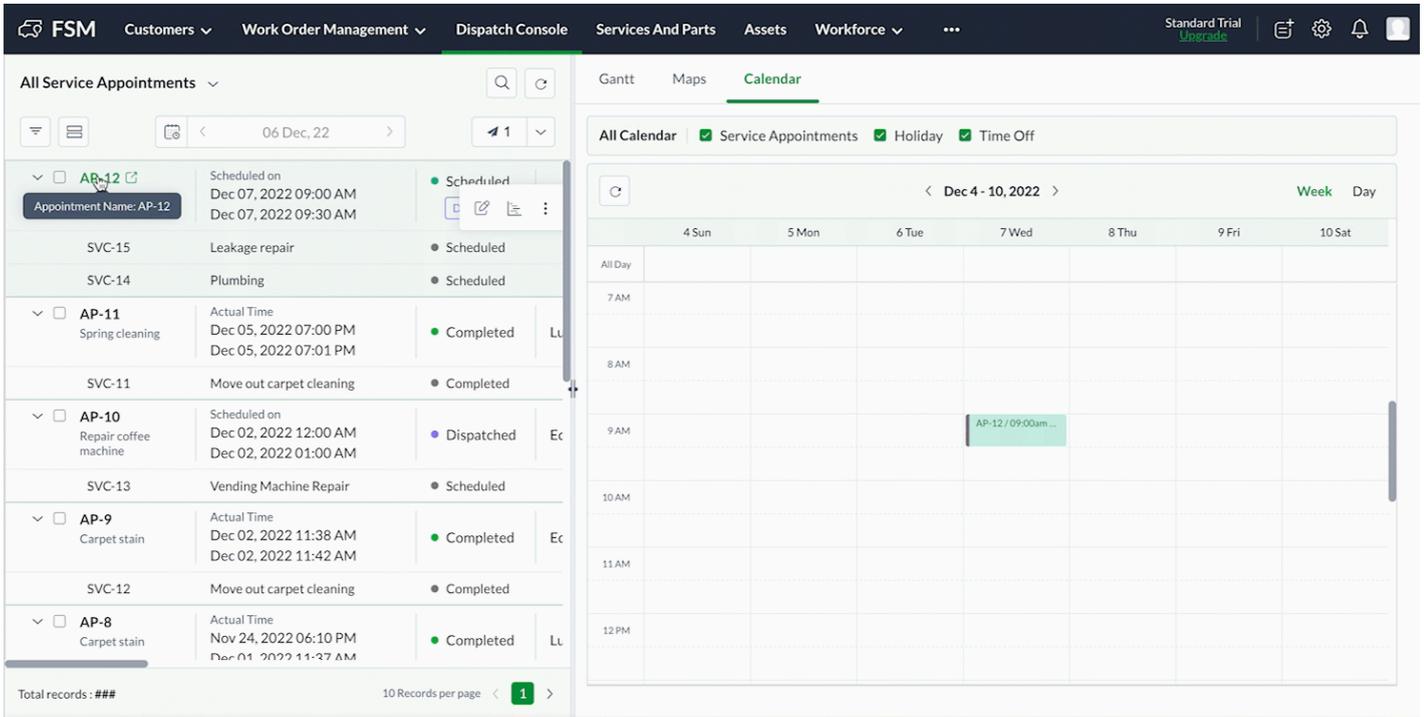
1. In the Calendar view, drag and drop an appointment to a different time
 2. In the Calendar view, resize the appointment
 3. Drag and drop the appointment from the *Service Appointments List* to a new time in the Calendar view
1. In the Calendar view, you can reschedule an appointment by dragging and dropping it to a different time.

The screenshot displays the FSM Dispatch Console interface. On the left, there is a list of work orders (WO) and services (SVC) with their respective statuses (Scheduled, In Progress, Completed). The right side shows a calendar view for the week of Dec 4 - 10, 2022. A service appointment is visible on Wednesday, Dec 7, 2022, from 9 AM to 10 AM, labeled 'AP-12 / 09:00am...'. The interface includes navigation tabs for Gantt, Maps, and Calendar, and a search bar at the top.

2. In the Calendar view, you can also reschedule an appointment by resizing the appointment. Move your cursor to the bottom edge of the service appointment and when the cursor changes to a downward arrow, resize it to the duration you want for the service appointment.

This screenshot is identical to the one above, showing the FSM Dispatch Console interface. The mouse cursor is now positioned at the bottom edge of the service appointment 'AP-12 / 09:00am...' on Wednesday, Dec 7, 2022, indicating that the user is about to resize the appointment.

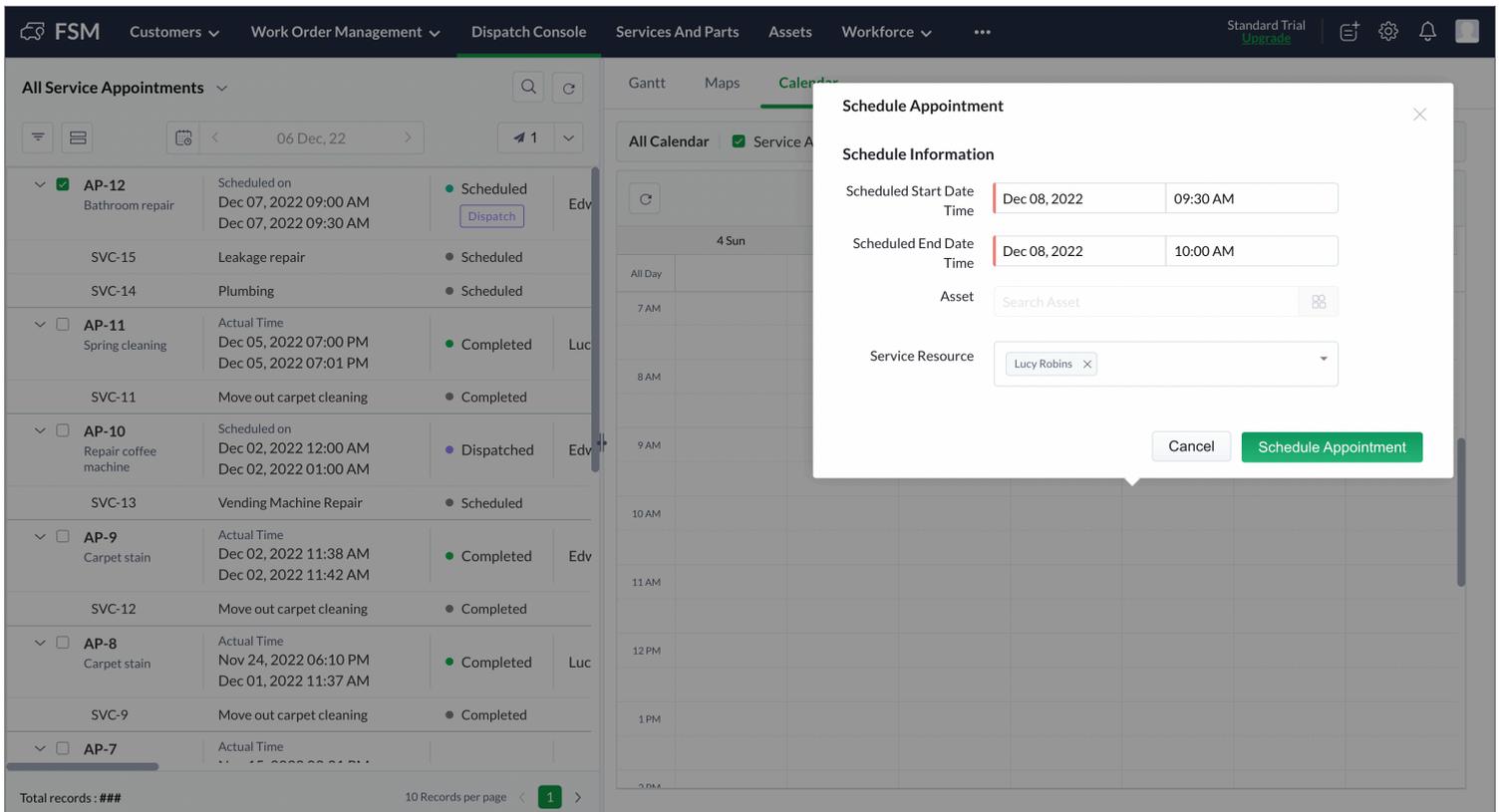
3. Lastly, you can reschedule an appointment by dragging and dropping the appointment from the Service Appointments List to a new time in the Calendar view.



After rescheduling, in the *Schedule Appointment* dialog, make the following changes if necessary and click **Schedule Appointment**.

1. Schedule Start/End time
2. Assigned agent

Click  to view the appointment details in a new window.



Note:

The drag-and-drop option will be available for appointments in the **New**, **Scheduled**, and **Dispatched** statuses.