



# Dispatch Console Resources List

The Service Resources List is displayed on the left side of the [Gantt](#), and [Grid](#) view.

The screenshot displays the Zoho FSM Dispatch Console interface. On the left, there is a list of service appointments (AP-55, SVC-86, AP-54, AP-51, AP-50, AP-49) with their respective details. On the right, a Gantt chart shows the schedule for these appointments, with a red box highlighting the 'Field Technician' resource list. The list includes names like Cris Lass, Home Painting, John Stillman, Lilly Rush, Nick Vera, Scotty Valens, and Will Jeffries, along with their service appointment counts. The Gantt chart shows appointment bars for 'AF-48' (2 Hr 50 min) and 'AF-48' (2 Hr 15 min), both marked as 'Not yet Invoiced'.

You can filter the Service Resources List using the following criteria:

- Resource type, i.e. All, Crew, or Agents
- Territory
- Skills

You can also sort the Service Resources List using the agent or crew name. The agents will be listed first followed by the crew.

The screenshot shows the FSM Dispatch Console interface. On the left, there is a list of service appointments with columns for appointment ID, description, and scheduled/actual times. On the right, a Gantt chart displays a calendar view for Friday, March 15, 2024, with a red block representing appointment AP-27 (1 Hr, Not yet Invoiced) and a purple block. A dropdown menu is open for 'Field Technician', showing a search filter 'All, Zylker, Asc' and a list of options: 'All' (selected), 'Crew', and 'Agent' under the 'Field Technician' category; 'Territory' with options 'Zylker' (selected), 'Alaska', 'Montana', and 'Quebec'; 'Skills' with options 'Carpet Cleaning & Stain Removal' and 'Painting'; and 'Sort By' with options 'Service Resource Name', 'Asc' (selected), and 'Desc'. 'Clear' and 'Apply' buttons are at the bottom of the dropdown.

The following details about the field agents and crew are displayed:

- Name
- Assigned service appointments count

This close-up shows three resource entries. The first entry, 'Cris Lass', is highlighted with a red box and shows 'Service Appointments : 1'. The second entry, 'Home Painting', shows 'Service Appointments : 0'. The third entry, 'John Stillman', shows 'Service Appointments : 1'. Each entry has an expand/collapse arrow to its right.

For a crew, you can see the agents in the crew by clicking the expand arrow [▶].

Cris Lass Service Appointments : 1
Home Painting Service Appointments : 0
Scotty Valens
Will Jeffries
John Stillman Service Appointments : 1

## Service Resource Details

Clicking on a particular row will show the details of the field agent/crew.

The appointments assigned to the field agent/crew can be viewed in the service resource calendar with Monthly, Weekly, or Daily views. Hover over an entry to view the details. Further details of the appointment can be viewed by clicking on the entry. The [TimeOff](#) entries will also be displayed. Within this service resource calendar, you can [schedule](#) appointments.

SR Details

Service Resource Name Edward Cormoran  
Type Agent  
User Edward Cormoran

Calendar

Calendar interface for Edward Cormoran, showing a monthly view for November 2022. The calendar displays appointments for various dates, including a detailed popup for a scheduled appointment on Nov 11, 2022.

Calendar View: November 2022 (Month view selected)

Sun	Mon	Tue	Wed	Thu	Fri	Sat
30	31	1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26

Appointment Details (Nov 11, 2022):

- WO3 / AP-3
- Clogged sink
- Scheduled
- Resources: Edward Cormoran
- Scheduled Time: Nov 11, 2022 09:00 AM - Nov 11, 2022 10:30 AM
- Contact: Lucy Robins
- Company: ABC Services

Other appointments shown in the calendar:

- AP-1 / 06:30am (Sun 13)
- AP-5 / 09:00am (Sun 13)
- AP-3 / 09:00am (Thu 10)
- AP-6 / 11:00am (Thu 17)
- AP-7 / 12:00am (Fri 18)
- Leave - Personal work (Mon 21)

All the appointments assigned to the field agent/crew are also displayed in a list view.

Edward Cormoran						
Appointments assigned to		SR	CREW			
Appointment	Status	Total	Work Order	Asset	Start Date Time	End Date Time
AP-4	Scheduled	\$106.5	WO4		Nov 15, 2022 09:00 AM	Nov 15, 2022 11:00 AM
AP-3	Scheduled	\$138.45	WO3		Nov 11, 2022 09:00 AM	Nov 11, 2022 10:30 AM
AP-2	Scheduled	\$127.8	WO2		Nov 17, 2022 09:00 AM	Nov 17, 2022 10:00 AM
AP-1	Scheduled	\$259.26	WO1		Nov 14, 2022 06:30 AM	Nov 14, 2022 08:00 AM

Other details of the field agent/crew like the **Territories** they have worked in, their **Skills**, their [TimeOff](#) and [Trip](#) entries will be displayed.

Edward Cormoran			
<b>Territories</b>			
Name	Start Date Time	End Date Time	
Zylker	Nov 09, 2022 01:10 PM		
<b>Skills</b>			
Name	Rating		
Plumbing	4		
<b>TimeOff</b>			
Start Date Time	End Date Time	Reason	
Nov 22, 2022 12:00 AM	Nov 22, 2022 11:59 PM	Leave	
<b>Trips</b>			
Name	Start Time	End Time	Distance Travelled
Trip1	Nov 14, 2022 04:17 PM	Nov 14, 2022 04:49 PM	0.00 mi

## Scheduling in Service Calendar

You can do the following in the service resource calendar:

- Create appointment
- Reschedule through drag and drop

## Create Appointment

1. Click on the point in the calendar that corresponds to the day or time for which you want to create the appointment.
2. In the *Create Appointment* popup, choose the work order for which you want to create the appointment.
3. In the *Create Appointment* popup, the following details will be populated, which you can change if required.

Click **Schedule** or **Schedule and Dispatch** to continue.

- a. Service
- b. Summary
- c. Scheduled Start/End Date Time
- d. Service Resource

You can create appointments from the Month, Week, and Day views.

The screenshot shows a Zoho calendar interface for a user named Edward Cormoran. The calendar is in 'Month' view for November 2022. The interface includes a sidebar with search and navigation icons, and a main calendar grid. The grid shows days from Sunday to Saturday. Appointments are represented by colored bars with labels: 'AP-1 / 06:30am' on Sunday the 13th, 'AP-2 / 09:00am' on Wednesday the 9th, and 'AP-3 / 12:00am' on Thursday the 10th. The number '10' is highlighted in a green circle on the 10th. The bottom of the interface shows a 'per page' selector set to '1'.

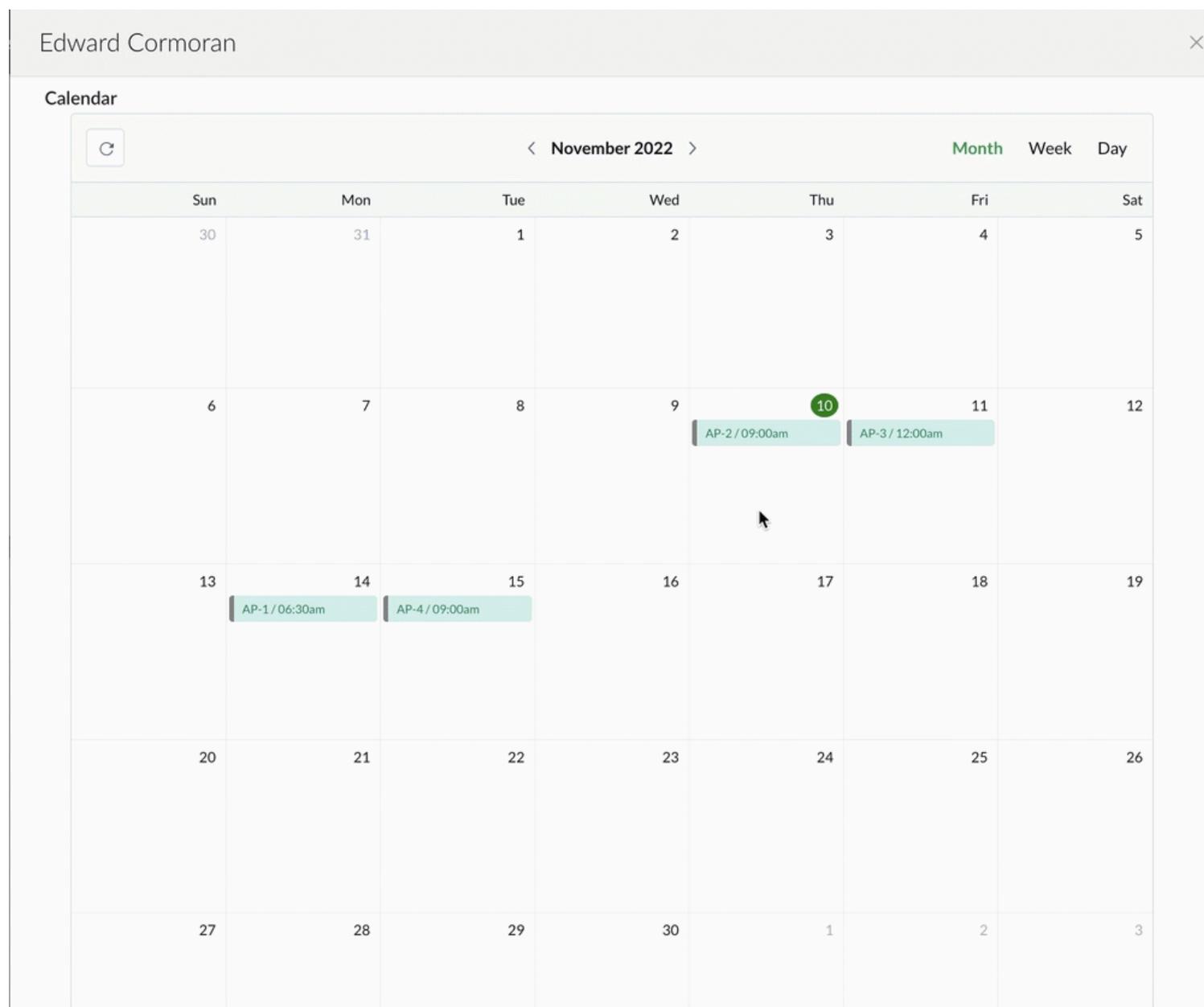
Calendar							Month	Week	Day
Sun	Mon	Tue	Wed	Thu	Fri	Sat			
30	31	1	2	3	4	5			
6	7	8	9	10	11	12	AP-2 / 09:00am	AP-3 / 12:00am	
13	14	15	16	17	18	19	AP-1 / 06:30am		
20	21	22	23	24	25	26			
27	28	29	30	1	2	3			

## Reschedule Appointment

From the service resource calendar, you can reschedule an appointment in the following ways:

1. Drag and drop an appointment to a different date or time
2. Resize the appointment

You can reschedule an appointment by dragging and dropping it to a different date or time. In the *Schedule Appointment* popup, the details are prefilled. Make the necessary changes and click **Schedule Appointment**. You can reschedule appointments from the Month, Week, and Day views.



The screenshot shows a calendar interface for Edward Cormoran. The calendar is set to November 2022 and is in the 'Month' view. The calendar grid shows days from Sunday to Saturday. Appointments are represented by light blue bars with labels: 'AP-1 / 06:30am' on Sunday, November 13; 'AP-2 / 09:00am' on Thursday, November 10; 'AP-3 / 12:00am' on Friday, November 11; and 'AP-4 / 09:00am' on Monday, November 14. A mouse cursor is positioned over the Thursday, November 10 appointment bar. The calendar interface includes a refresh button, navigation arrows, and view toggles for 'Month', 'Week', and 'Day'.

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. In the *Schedule Appointment* popup, the details are prefilled. Make the necessary changes and click **Schedule Appointment**. You can resize and reschedule appointments only from the Week, and Day views.

The screenshot shows a calendar interface for Edward Cormoran. At the top, there is a navigation bar with a refresh icon, a date range for November 2022, and view options for Month, Week, and Day. The calendar grid shows dates from 30th to 5th. A pop-up window is open over the date 11th, displaying the following information:

- WO3 / AP-3**
- Clogged sink
- Scheduled -None-
- Resources**  
Edward Cormoran
- Scheduled Time**  
Nov 11, 2022 09:00 AM  
Nov 11, 2022 10:00 AM
- Contact** Lucy Robins
- Company** ABC Services

**Tip:** Click on the date in the Month view to go to the Day view.

Calendar

◀ November 2022 ▶							Month	Week	Day
Sun	Mon	Tue	Wed	Thu	Fri	Sat			
30	31	1	2	3	4	5			
6	7	8	9	10	11	12	AP-3 / 09:00am		
13	14	15	16	17	18	19			
	AP-1 / 06:30am	AP-4 / 09:00am		AP-2 / 09:00am					
20	21	22	23	24	25	26			
27	28	29	30	1	2	3			