



Manage Service Appointments

Scheduling Service Appointments

All the service appointments in the Dispatch Console are initially scheduled by assigning them to a field agent or crew. Appointments can be scheduled from the *Work Order Details* page, as mentioned [here](#). This can also be done from the Dispatch Console as described below:

To schedule service appointments from Dispatch Console:

1. Click the **Schedule** button for the service appointment you want to schedule.

The service appointments to be scheduled will be in the *New* status.

A screenshot of a service appointment card. The card has a light blue border and contains the following information: 'AP-18' at the top left, a purple circle followed by 'NEW' below it, 'Description : Carpet Stain Removal', 'Start : Dec 28, 2021 02:30 AM', and 'End : Dec 28, 2021 03:30 AM'. At the bottom right of the card is a green 'Schedule' button. There are also a flag icon and a three-dot menu icon in the top right corner of the card.

2. Select the **Service Resource** to whom you want to assign the service appointment.

The Scheduled Start Time and Scheduled End Time can be scheduled for different dates. One or more resource can be assigned to the appointment. If more than one Service Resources is assigned, you can select one of them as the **Lead** else the assigned field agent will be deemed the lead.

Schedule ✕

Schedule Information

Scheduled Start Time

Scheduled End Time
1 Hr

Asset

Service Resource

Lead

The **Lead** field will be displayed only when more than one Service Resources are added.

While scheduling, if the field agent being assigned is unavailable during the period between the **Scheduled Start Time** and **Scheduled End Time**, then the following message will be displayed:

Conflict found

The field technicians listed below are unavailabe during the chosen time.

Resource	Appointment	Scheduled Start Time	Scheduled End Time	Actual Start Time	Actual End Time
Emily Raymond	AP-44	May 09, 2022 09:00 AM (GMT -07:00)	May 09, 2022 10:00 AM (GMT -07:00)	--	--

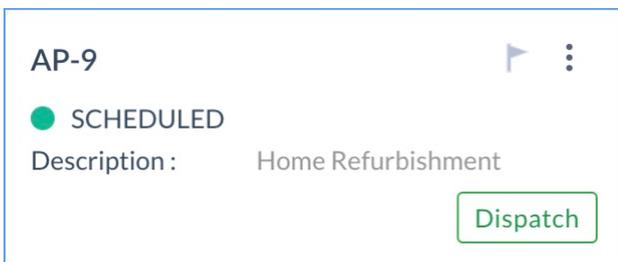
While scheduling, if the Scheduled Start Time and Scheduled End Time falls outside the organization [business hours](#), then a confirmation message will be displayed. You can either choose to continue scheduling the appointment outside the business hours or change the timings.

Dispatching Service Appointments

When a service appointment is dispatched, the field agents assigned to the appointment are notified in their FSM mobile app through push notifications.

To dispatch a service appointment:

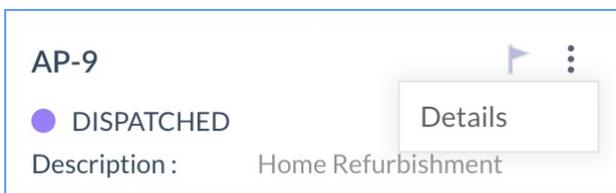
1. Click the **Dispatch** button for the service appointment you want to dispatch.
The service appointments to be dispatched will be in the *Scheduled* status.



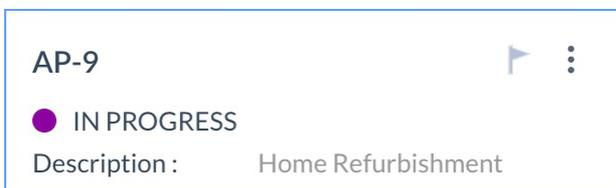
2. Click **Dispatch** in the confirmation message.

Multiple appointments can be dispatched at a time using the **Bulk Dispatch** button at the top of the Service Appointment List. Upon clicking **Bulk Dispatch**, an overlay with all Scheduled appointments will be displayed. You can choose one or more appointments to dispatch.

After the service appointment has been dispatched, the status changes to *Dispatched*. Upon clicking **Details**, the service appointment details can be viewed. The service appointment details can also be viewed by clicking the service appointment bar in the Gantt view.



Once the field agents starts work on the service appointment, then the status of the service appointment changes to **In Progress**.



While the status of the appointment is In Progress, you can see details of the appointment's scheduled and actual start time. The bar will start from the actual time of the appointment and the start of the dotted line indicate the scheduled time (see screenshot below).

The screenshot shows the ZYLKER Dispatch Console interface. The top navigation bar includes Home, Requests, Estimates, Work Orders, Dispatch Console, Contacts, Companies, Analytics, Services And Products, Assets, and Reports. The main area displays a Gantt chart for the date 2nd Jul 20. A resource named Anuja Chauhan is assigned to an appointment AP-1, which is currently in progress. The appointment bar starts at 07:00 PM and ends at 07:00 PM. A tooltip for AP-1 provides the following details:

Summary	Test
Workorder ID	AP-1
Status	In Progress
Preferred Slot	---
Start time	02-07-2020 06:00:35 pm
End time	02-07-2020 07:00:35 pm

Bulk Dispatch

Service appointments can be dispatched in bulk. The **Bulk Dispatch** option will be enabled if there are more than one service appointments with the status **Dispatch**. Click the Bulk Dispatch button and in the overlay, select the appointments you want to dispatch and click **Bulk Dispatch**.

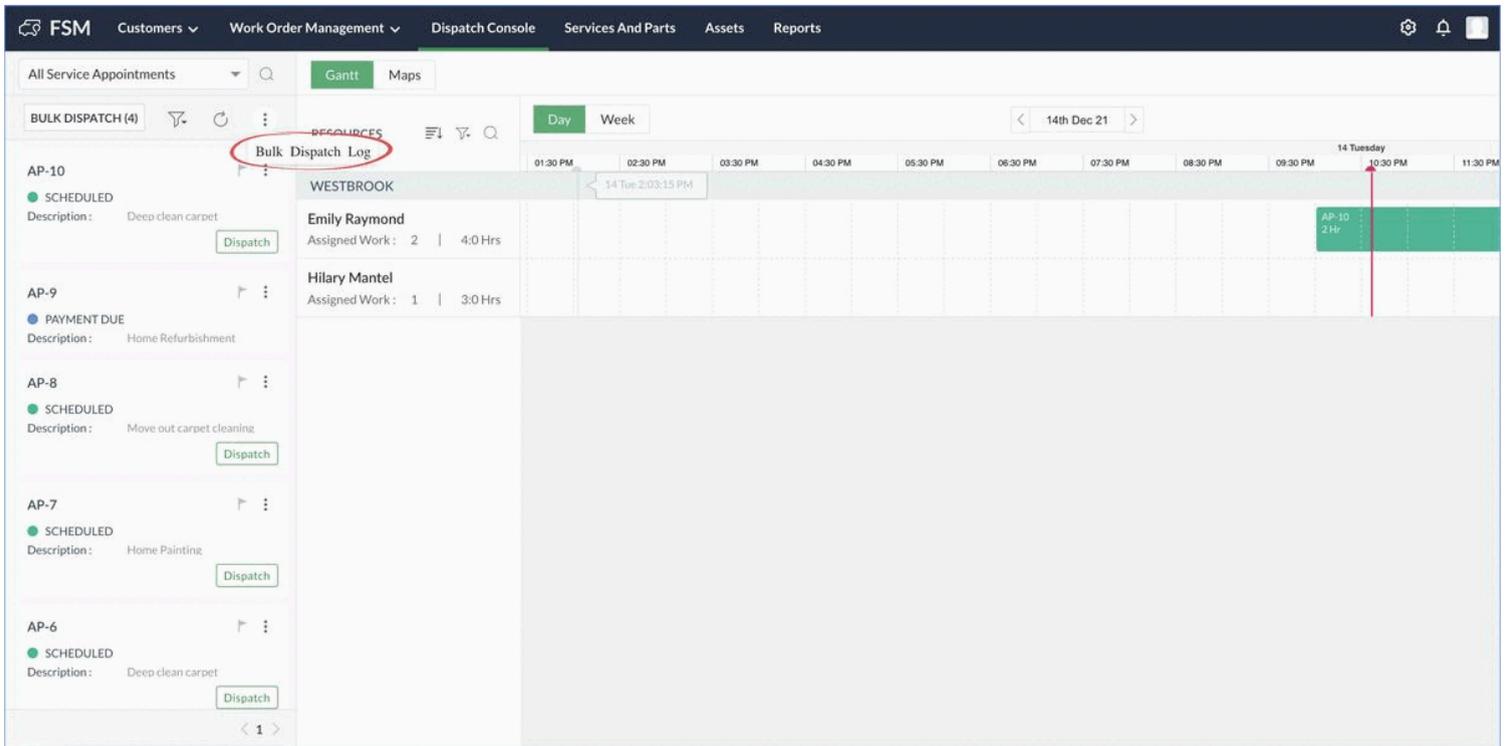
The screenshot shows the FSM Dispatch Console interface. The top navigation bar includes FSM, Customers, Work Order Management, Dispatch Console, Services And Parts, Assets, and Reports. The main area displays a Gantt chart for the date 14th Dec 21. A resource named FILLMORE is assigned to several appointments. The appointments are listed in the left sidebar:

- AP-9: IN PROGRESS, Description: Home Refurbishment
- AP-8: SCHEDULED, Description: Move out carpet cleaning, Dispatch button
- AP-7: SCHEDULED, Description: Home Painting, Dispatch button
- AP-6: SCHEDULED, Description: Deep clean carpet, Dispatch button
- AP-5: PAID, Description: Bathroom Plumbing

The Bulk Dispatch button is circled in red in the screenshot. The Gantt chart shows a bar for AP-9 starting at 05:30 PM and ending at 05:30 PM. A tooltip for AP-9 provides the following details:

Summary	Home Refurbishment
Workorder ID	AP-9
Status	In Progress
Preferred Slot	---
Start time	14-12-2021 05:30:00 pm
End time	14-12-2021 05:30:00 pm

You can view the log details regarding bulk dispatch by clicking on **Bulk Dispatch Log**. The Bulk Dispatch Log option will be displayed when you click the more options [:] icon next to the **Bulk Dispatch** button.



Viewing Service Appointment Details

You can view the details of the service appointment by either clicking on the **Appointment Name** in the left panel of the Dispatch Console or on the service appointment bar in the Gantt. The details about a service appointment will be displayed under the following sections:

Overview

The overview displays all the details about the service appointment.

WO9 / AP-9 ✕

AP-9 Home Refurbishment

● In Progress 👑 Tracy Pollan Complete Work Edit

OVERVIEW | TIMELINE | TIME SHEETS | SERVICE REPORT | INVOICE | TRIPS | ...

▼ SA Information

Service: Painting - Exterior House(SVC-13)

Scheduled Time: ● 15 Dec,2021 09:00 AM
● 15 Dec,2021 11:00 AM

Actual Time: ● 15 Dec,2021 11:19 AM
● —

Assigned Resources

Service Resource	Duration
Tracy Pollan	21 min
Stephen Wright	—
Total Duration	21 min

▼ Service Appointment Summary

Summary: Home Refurbishment

Contact: Dexter Morgan

Company: Nebula

Asset: —

Due Date: —

▼ Preferred Times

Territory: Fillmore

Service Address: SERVICE ADDRESS
 10 Oak St,
 Oconee, Illinois, 62553,
 United States
 Tax : IllinoisSalesTax(6.25%)

Timeline

Select the [Timeline](#) tab.

WO9 / AP-9 ✕

AP-9 Home Refurbishment

● In Progress 👑 Tracy Pollan Complete Work ▾ Edit

OVERVIEW **TIMELINE** TIME SHEETS SERVICE REPORT INVOICE TRIPS ...

All the actions and events related to this Service Appointment are recorded in a chronological order. Show all updates ▾ All Time ▾

Today - Dec 15, 2021

- ✎ Service Appointment details updated
11:20 am . Tracy Pollan

Actual Start Date Time updated from Blank to 2021-12-15 11:19 am
- 📅 Time Sheet **TS7** created
11:19 am . Tracy Pollan
- ↻ Status updated to In Progress
11:19 am . Tracy Pollan
- ↻ Status updated to Dispatched
11:15 am . Daniel Warne
- ✎ Service Appointment details updated
11:15 am . Daniel Warne

Service Appointment Owner updated from Warne to Pollan
User Lead updated from Blank to Tracy Pollan
- ↻ Status updated to Scheduled
11:13 am . Daniel Warne
- ✎ Service Appointment details updated
11:13 am . Daniel Warne

Time Sheets

Select the **Time Sheet** tab. The details of the [time sheets](#) created for the appointment will be displayed here. Time sheets can also be added from within this tab.

WO9 / AP-9 ✕

AP-9 Home Refurbishment

● In Progress 👑 Tracy Pollan Complete Work Edit

OVERVIEW TIMELINE **TIME SHEETS** SERVICE REPORT INVOICE TRIPS ...

Time Sheets Add Time Sheet

View and manage the time spent by the technicians on appointments.

RESOURCES	DESCRIPTION	START TIME	END TIME	ACTIONS
Tracy Pollan 22 min	—	15 Dec,2021 11:19 AM	—	✎ 🗑

Service Report

The Field Agent and Dispatcher can create the service report in the mobile app. Refer to the [mobile help page](#) for details on Service Report.

AP-9 Home Refurbishment

Payment Due Tracy Pollan

Record Payment ▾

Edit

- OVERVIEW
- TIMELINE
- TIME SHEETS
- SERVICE REPORT**
- INVOICE
- TRIPS
- ...

Service Report

Edit ▾

View and manage the service reports generated by the technicians.

Service Report

Zylker

Account Name : Nebula

Customer Name : Dexter Morgan

Service Address : 10 Oak St,
Oconee, Illinois, 62553,
United States.

Service Details

Problem statement : -

Service Summary : Home Refurbishment

Service Duration : 33Min

Technicians Involved : Tracy Pollan
Stephen Wright

Service

ID	Name	Price(\$)	Quantity	Total(\$)
SVC-13	Painting - Exterior House	50	1	53.13

Invoices

Refer to [this](#) page for details on invoicing and payments.

AP-9 Home Refurbishment

Payment Due  Tracy Pollan

Record Payment ▼

Edit

- OVERVIEW
- TIMELINE
- TIME SHEETS
- SERVICE REPORT
- INVOICE
- TRIPS
- ...

Send Invoice

Sent

Zylker
Illinois
U.S.A

INVOICE

INV-000005

Balance Due
\$319.55

Bill To
Nebula
3070 N Water St
Decatur
62526 Illinois
United States

Invoice Date : 14 Dec 2021
Terms : Due On Receipt
Due Date : 14 Dec 2021

#	Item & Description	Qty	Rate	Amount
1	Painting - Exterior House	1.00 Hours	50.00	50.00
2	Exterior Primer - 4Ltr (White)	3.00 Pack	75.25	225.75
3	Texture Roller with Handle for Wall Decor, 7-inch	1.00 Each	25.00	25.00

Trips

Refer to the [mobile help page](#) for details on Trips.

WO9 / AP-9 ✕

AP-9 Home Refurbishment

Payment Due  Tracy Pollan [Record Payment](#) [Edit](#)

OVERVIEW TIMELINE TIME SHEETS SERVICE REPORT INVOICE **TRIPS** ...

Trips

View and manage the trips done by the technicians on appointments.

TRIP	DESCRIPTION	START TIME	END TIME	DISTABCE TRAVELLED	
Trip4 3 min	—	15 Dec,2021 11:52 AM	—	—	

Notes

Select the **Notes** tab. Any additional details about the appointment can be added here.

WO36 / AP-45 ×

AP-45 Home Refurbishment

New
 Not yet Invoiced
 Schedule ▼
Edit ▼

OVERVIEW
TIMELINE
SERVICE AND PARTS
NOTES
...

Upcoming opportunity

The customer wan

⌵

Attach File
x Remove Title
Cancel
Save

👤 **Wooden Gazebo**

Specifications for the gazebo need to be discussed.

👤 Created By William Turner
 🕒 Created Time Feb 01, 2023 02:14 PM



wooden-gazeb...

👤 **Color swatch**

Need to show this color swatch to the customer.

👤 Created By William Turner
 🕒 Created Time Feb 01, 2023 04:03 PM



blue-color-swa...

Editing Service Appointments

The details of a service appointment can be edited (i.e. the Scheduled Start/End time and the assigned field agent/crew can be changed).

To edit a service appointment:

1. In the *Service Appointment List*, click **Details** from the more options [⋮] menu for the service appointment you want to edit.
2. Click **Edit** in the service appointment details overlay.

WO9 / AP-9 ✕

AP-9 Home Refurbishment

● In Progress 👑 Tracy Pollan **Complete Work** ▾ Edit

OVERVIEW | TIMELINE | TIME SHEETS | SERVICE REPORT | INVOICE | TRIPS | ...

▼ SA Information

Service: Painting - Exterior House(SVC-13)

Scheduled Time: 15 Dec,2021 09:00 AM
15 Dec,2021 11:00 AM

Actual Time: 15 Dec,2021 11:19 AM
—

Assigned Resources

Service Resource	Duration
Tracy Pollan	26 min
Stephen Wright	—
Total Duration	26 min

▼ Service Appointment Summary

Summary: Home Refurbishment

Contact: Dexter Morgan

Company: Nebula

Asset: —

Due Date: —

▼ Preferred Times

Territory: Fillmore

659465 ADDRESS

3. Make the necessary edits in and click **Save**.

Edit Appointment ✕

Service Appointment Summary

Summary

Asset

Services Tax: IllinoisSalesTax (6.25%)

Service Name	Quantity	List Price	Discount	Sub Total	Tax Name	
Painting - Exterior House	1 Ho...	50	0 \$	50.00	IllinoisSalesTax	53
Description <input style="width: 100%;" type="text"/>						
Sub Total (\$)						53.13
With tax						
+ New line						
Painting - Exterior House						
Texture Roller with Handle for	1 Each	25	0 \$	25.00	IllinoisSalesTax	26
Description <input style="width: 100%;" type="text"/>						
Service <input style="width: 100%;" type="text" value="Painting - Exterior House"/>						
Sub Total (\$)						266.42
With tax						
Grand Total (\$)						319.55
Services + Parts						

Rescheduling Service Appointments

A service appointment can be rescheduled (i.e. the Scheduled Start/End time and the assigned field agent/crew can be changed). Once the appointment is rescheduled, the affected field agent/crew will be notified of the change.

To reschedule a service appointment:

1. In the *Service Appointment List*, click **Details** from the **more options** [⋮] menu for the service appointment you want to reschedule.

2. Click **Reschedule** from the **more options** [***] menu in the service appointment details overlay.

WO9 /AP-9

AP-9 Home Refurbishment

In Progress Tracy Pollan

Complete Work Edit

OVERVIEW TIMELINE TIME SHEETS SERVICE REPORT INVOICE

SA Information

Service Painting - Exterior House(SVC-13)

Scheduled Time 15 Dec,2021 09:00 AM
15 Dec,2021 11:00 AM

Actual Time 15 Dec,2021 11:19 AM

Assigned Resources

Service Resource	Duration
Tracy Pollan	29 min
Stephen Wright	—
Total Duration	29 min

Service Appointment Summary

Summary Home Refurbishment

Contact Dexter Morgan

Company Nebula

Asset —

Due Date —

Preferred Times

Territory Fillmore

3. Make the necessary edits, then click **Schedule**.

Reschedule ×

Schedule Information

Scheduled Start Time

Scheduled End Time
2 Hr

Asset

Service Resource

Lead

Cancel Service Appointments

To cancel a service appointment:

1. In the *Service Appointment List*, click **Details** from the **more options** [⋮] menu for the service appointment you want to cancel.
2. Click **Cancel** from the **more options** [⋮] menu in the service appointment details overlay.

WO17 / **AP-16** ✕

AP-16 AC Installation

● Scheduled 👑 Daniel Warne

Dispatch Edit

OVERVIEW
TIMELINE
TIME SHEETS
SERVICE REPORT
INVOICE

▼ SA Information

Service AC Installation(SVC-22)

Scheduled Time ● 27 Dec,2021 06:00 PM
● 27 Dec,2021 07:00 PM

Actual Time *Not Available*

Assigned Resources

Service Resource	Duration
Stephen Wright	—
Stephen Wright	—

▼ Service Appointment Summary

Summary AC Installation

Contact Dexter Morgan

Company Nebula

Asset —

Due Date 12/27/2021

▼ Preferred Times

Territory Fillmore

SERVICE ADDRESS
 10 Oak St,
 Oconee, Illinois, 62553,
 United States

Service Address

Cancel

Terminate

Reschedule

3. Add notes, if any, and click **Save**.

Are you sure to Cancel? ✕

Notes

Customer no longer requires this service

Save
Cancel

Terminate Service Appointments

To terminate a service appointment:

1. In the *Service Appointment List*, click **Details** from the **more options** [⋮] menu for the service appointment you want to terminate.
2. Click **Terminate** from the **more options** [⋮] menu in the service appointment details overlay.

WO17 / AP-16

AP-16 AC Installation

Scheduled Daniel Warne

Dispatch Edit

Cancel
Terminate
Reschedule

OVERVIEW TIMELINE TIME SHEETS SERVICE REPORT INVOICE

SA Information

Service AC Installation(SVC-22)

Scheduled Time 27 Dec,2021 06:00 PM
27 Dec,2021 07:00 PM

Actual Time Not Available

Assigned Resources

Service Resource	Duration
Stephen Wright Stephen Wright	—

Service Appointment Summary

Summary AC Installation

Contact Dexter Morgan

Company Nebula

Asset —

Due Date 12/27/2021

Preferred Times

Territory Fillmore

Service Address
SERVICE ADDRESS
10 Oak St,
Oconee, Illinois, 62553,
United States

3. Add any notes, then click **Save**.

Are you sure to Terminate?

Notes

Customer not present at the location

Save Cancel

Adding Notes

To add notes to a service appointment, click **Details** for a service appointment in the *Service Appointment List*, add the notes in the **Notes** section under the **Service Appointment** tab and click **Save**.

WO9 / **AP-9** ✕

AP-9 Home Refurbishment

Payment Due  Tracy Pollan Record Payment Edit

OVERVIEW TIMELINE TIME SHEETS SERVICE REPORT INVOICE **NOTES** ...

Notes

The customer wants to|

 Attach Cancel Submit

Upcoming opportunity
Customer wants us to contact him for a possible refurbishment job in the borough.
Added By Tracy Pollan • 15 Dec,2021 12:02 PM