Service

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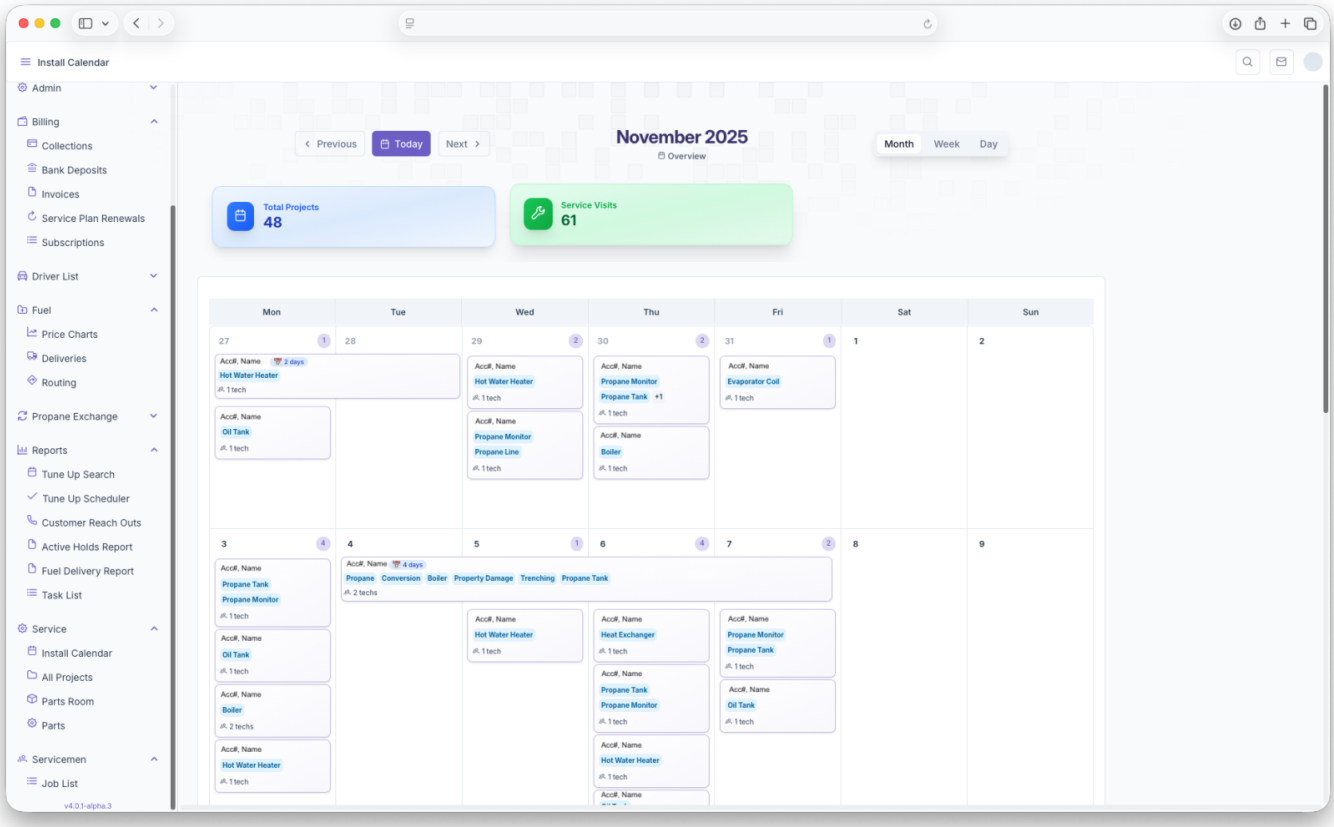
Install Calendar

Introduction

The Install Calendar shows all Projects/Services that are scheduled that have been worked or need to be worked on. To reach the Install Calendar, click on the Service dropodown on the side menu then click on Install Calendar. Clicking on the three bars on the top left of the page expands the side bar to show more detail allowing for easier navigation.

Install Calendar

Upon arriving on the Calendar page, it can then be filtered to display by Month, Week or Day by clicking on said button on the top right of the page. Clicking on the Previous or Next buttons allows the calendar to jump to the next or previous month, week or day depending on how the calendar is displayed. Clicking on Today jumps the calendar to the current month, week or day. Once selected, if there are projects/services on a given day, the calendar will show all work orders for each day. The work orders will then show



- Account Number

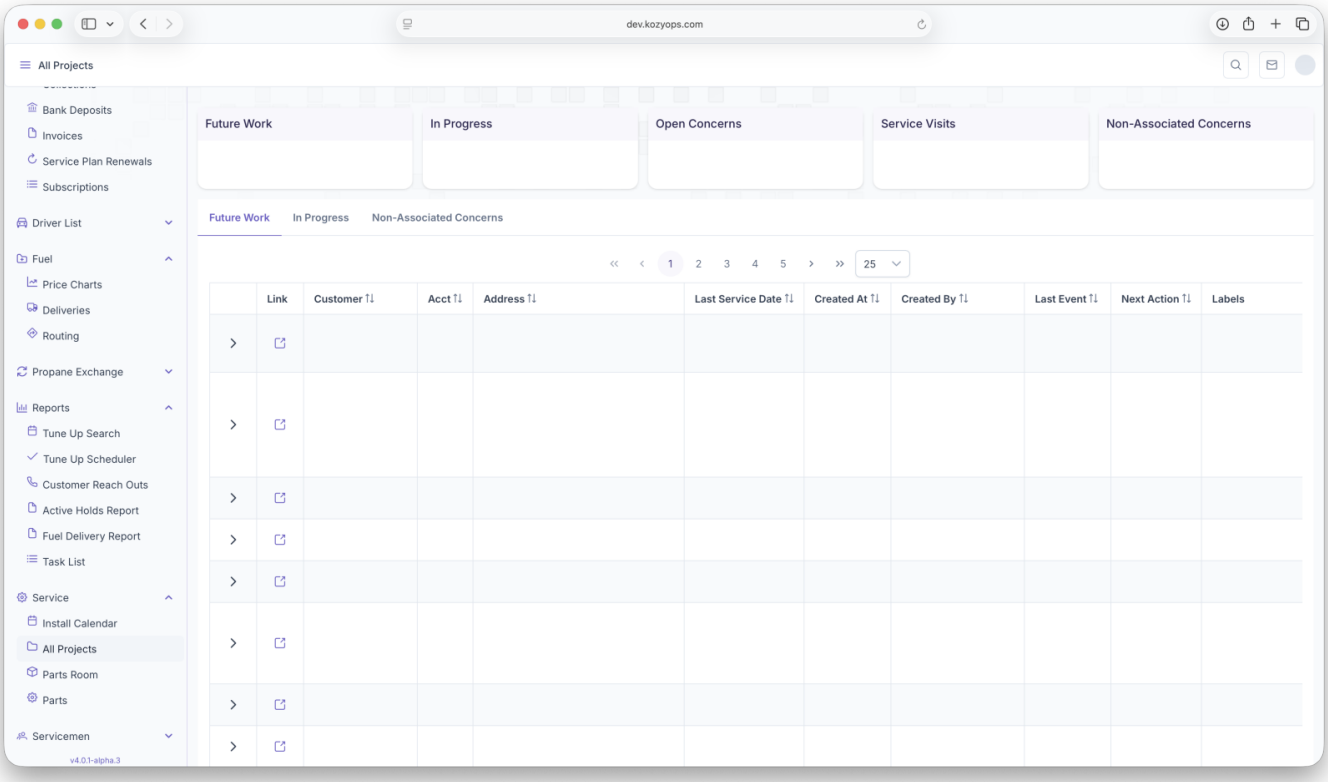
- Customer Name
- Projects/Services
- Number of Techs

Clicking on each project brings up a more detailed page on the selected work order. See Projects for more details

All Projects

All Projects

The All Projects Report shows all projects that are scheduled to be worked on, are currently being worked on. When reaching All Projects, the page will display the following Totals



- Future Work - Projects that had yet to be started
- In Progress - Projects that are currently being worked on
- Open Concerns - Concerns that have been created for the customer, but no project created for it yet
- Service Visits - Total Number of Service Visits
- Non-Asscíated Concerns -

The page can then be filtered to show specific information by clicking on one of the following tabs

- Future Work - Shows only Projects that need to be worked on
- In Progress - Shows only Projects that are currently in progress
- Non-Associated Concerns

Below that, a table will be generated with each project as a line item with the following columns

- Notes - Clicking on the arrow will bring up notes that are associated with the project selected
- Link - Clicking here will bring up the project page
- Customer Name - The Customers Name
- Account - The Customers Account Number
- Address - The Customers Address
- Last Service Date - The last date a service was provided to the customer
- Created Date - When the Project was created
- Created By - Who the project was created by
- Last Event - The last date that the project was updated
- Next Action - The next date that the project is going to be updated
- Project Labels - Any labels that are associated with the project being worked on

The Report can be sorted by hovering over a category and clicking on the arrow next to it when it appears

Parts Room

Parts