

FSL QUICK GUIDE EDITING A BOOKING



NAVIGATE TO THE SCHEDULE BOARD

1. Click on the Field Service app from the Dynamics 365 home page.
2. In the left navigation pane, select Schedule Board.
3. Locate the booking you need to edit using filters like date, resource, or status.

Work Order	Sales Order # / Project (Work Order)	Sales Person (Work Order)	Project Manager (Work Order)	Due Date (Work Order)	Estimated # of Hours (Work Order)	# of Openings (Work Order)	Display Address (Work Order)
00002	363225 - Telia CY-1201 Peoples Space ...	Kyle Furr	KYLE FURR	5/15/2024	5	10	3064 Salem Industrial Dr Winston-Salem, NC 27105
W-454490	366799 - PBG 2024 Line 87 Personnel D...	JWALLACE	JPOWERS	5/15/2024	5	10	C/O Cambro Corporation 2879 H...
W-331836	5700587 - SAGE HEALTH - Prichard	JALTANDO		7/05/2023	8	8	2319 Saint Stephens Road Mobile, AL 36606
W-331834	5702252 - Culinary Dropout	JALTANDO		5/11/2024	16	16	241 Summit Blvd Birmingham, AL 35203

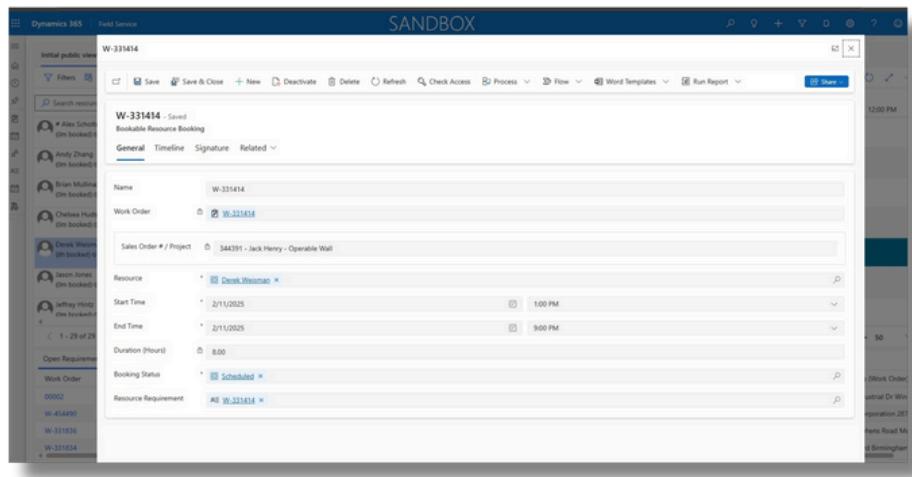
LOCATE THE BOOKING

1. Use the search function or manually find the booking on the Schedule Board.
2. Click on the booking block assigned to a resource.

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OPEN THE BOOKING DETAILS

1. Once you click on the booking, a pop-up window or form will appear with the booking details.
2. Click on "Open Booking Record" to view the full booking form.



EDIT BOOKING DETAILS

You can edit multiple fields, depending on the required changes:

1. Adjust Date & Time:
 - Modify the Start Time and End Time as needed.
 - Ensure that the time slot does not conflict with other bookings.
2. Reassign to a Different Resource:
 - In the Resource field, click the dropdown and select the new resource.
 - Check for resource availability before reassigning.
3. Update Status:
 - Change the booking status (e.g., Scheduled, In Progress, Completed, or Canceled).
4. Modify Booking Notes:
 - Update any additional notes regarding the booking.
5. Change Work Order Association (if applicable):
 - If the booking is linked to a Work Order, update the associated record.
6. Click Save & Close to apply the changes.
 - If prompted, confirm any modifications.

Refresh the Schedule Board