

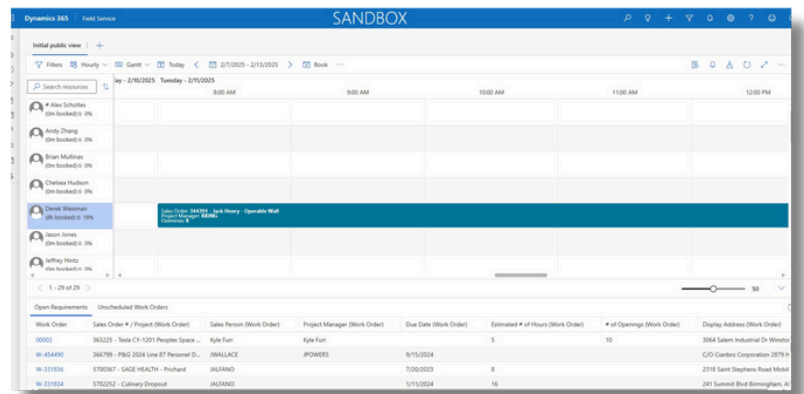
FSL QUICK GUIDE

EDITING A BOOKING



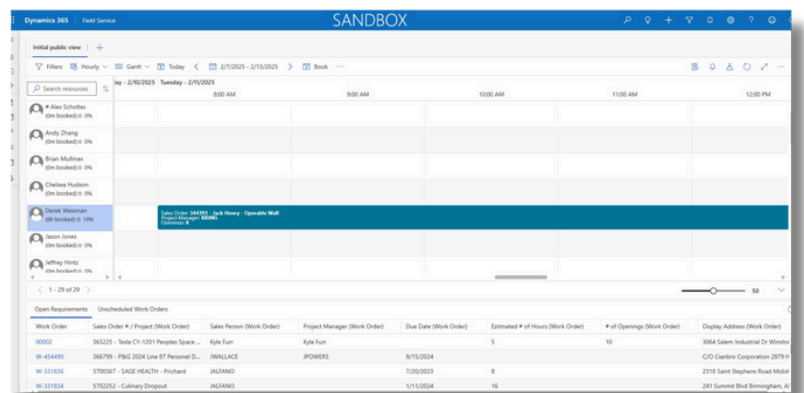
NAVIGATE TO THE SCHEDULE BOARD

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.



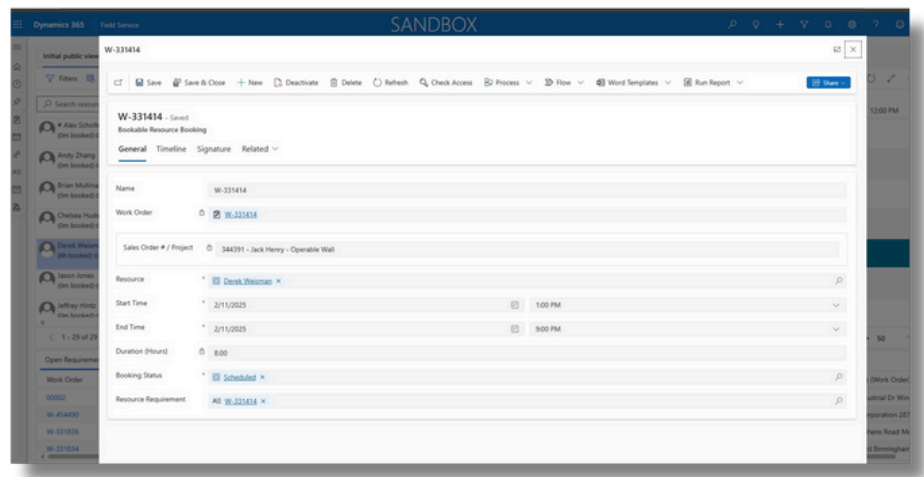
LOCATE THE BOOKING

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



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.



The screenshot shows the 'Open Booking Record' form in Dynamics 365. The form is titled 'W-331414 - Saved' and is a 'Bookable Resource Booking'. It includes tabs for 'General', 'Timeline', 'Signature', and 'Related'. The 'General' tab is active, showing fields for Name (W-331414), Work Order (W-331414), Sales Order # / Project (384291 - Jack Henry - Operable Wall), Resource (Desk Workman), Start Time (2/11/2025 1:00 PM), End Time (2/11/2025 9:00 PM), Duration (Hours) (8:00), Booking Status (Scheduled), and Resource Requirement (W-331414). The form is displayed in a 'Sandbox' environment.

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