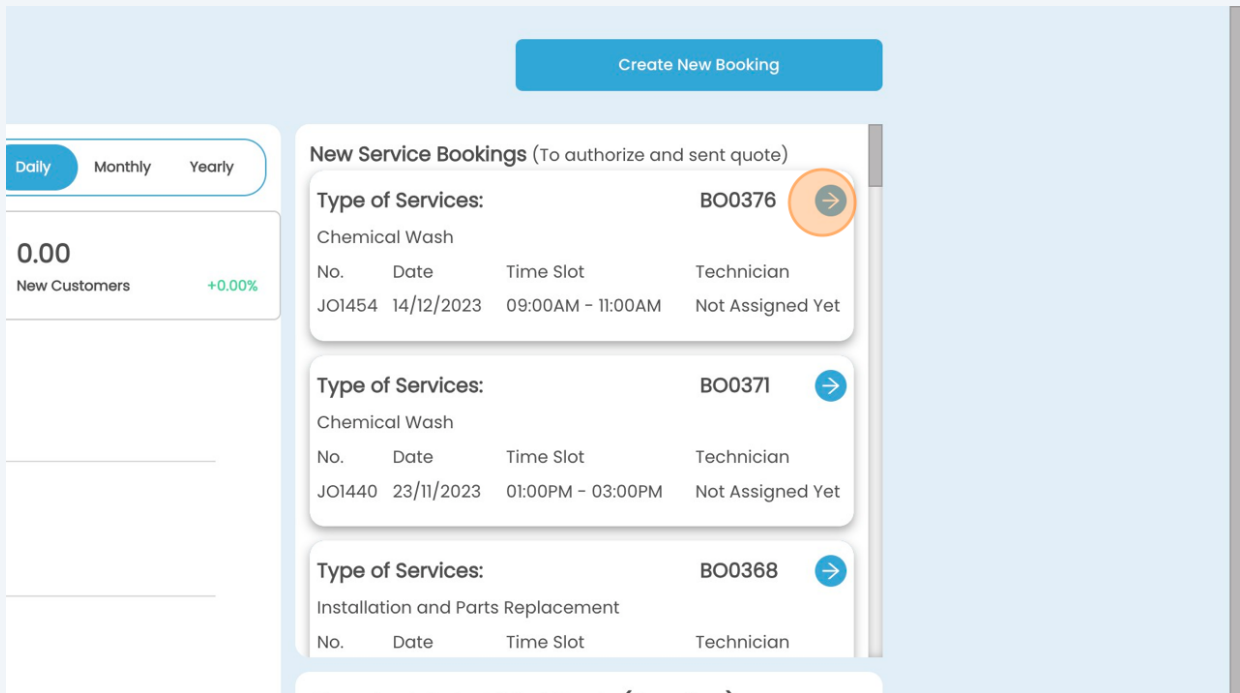


# How To Assign A Technician To Booking

## To assign for one-time bookings

1 Click to view a new booking



The screenshot displays the ShareDule interface for managing bookings. At the top, there is a blue button labeled "Create New Booking". Below this, the interface is divided into two main sections. On the left, there is a sidebar with a "Daily" tab selected, showing a balance of "0.00" and a "+0.00%" change. On the right, there is a section titled "New Service Bookings (To authorize and sent quote)". This section contains a list of bookings. The first booking is highlighted with an orange circle and a right arrow icon, indicating it is the one to be viewed. The bookings are as follows:

New Service Bookings (To authorize and sent quote)			
Type of Services:		BO0376	
Chemical Wash			
No.	Date	Time Slot	Technician
JO1454	14/12/2023	09:00AM - 11:00AM	Not Assigned Yet

Type of Services:		BO0371	
Chemical Wash			
No.	Date	Time Slot	Technician
JO1440	23/11/2023	01:00PM - 03:00PM	Not Assigned Yet

Type of Services:		BO0368	
Installation and Parts Replacement			
No.	Date	Time Slot	Technician

## 2 Select a technician from here

The screenshot shows a booking form with the following fields and values:

- Address (Line 1): Carvey Road
- Address (Line 2): [Empty]
- Postal Code: 369610
- Country: [Empty]
- Appointment Date: 14/12/2023
- Type Of Service: Chemical Wash
- Assign Technician: Select A Technician (dropdown menu is open)

The dropdown menu for 'Assign Technician' lists the following options: Bach le, Jimmy Tan, tech mot, Ty, and Thanhnd. The option 'Jimmy Tan' is highlighted with an orange circle.

Buttons: View Quote, Send Booking Details.

Quote Attached: QT0396

## 3 Click "Save"

The screenshot shows the same booking form as above, but with the 'Assign Technician' dropdown menu closed and 'Jimmy Tan' selected. The 'Save' button is highlighted with an orange circle.

The form fields and values are:

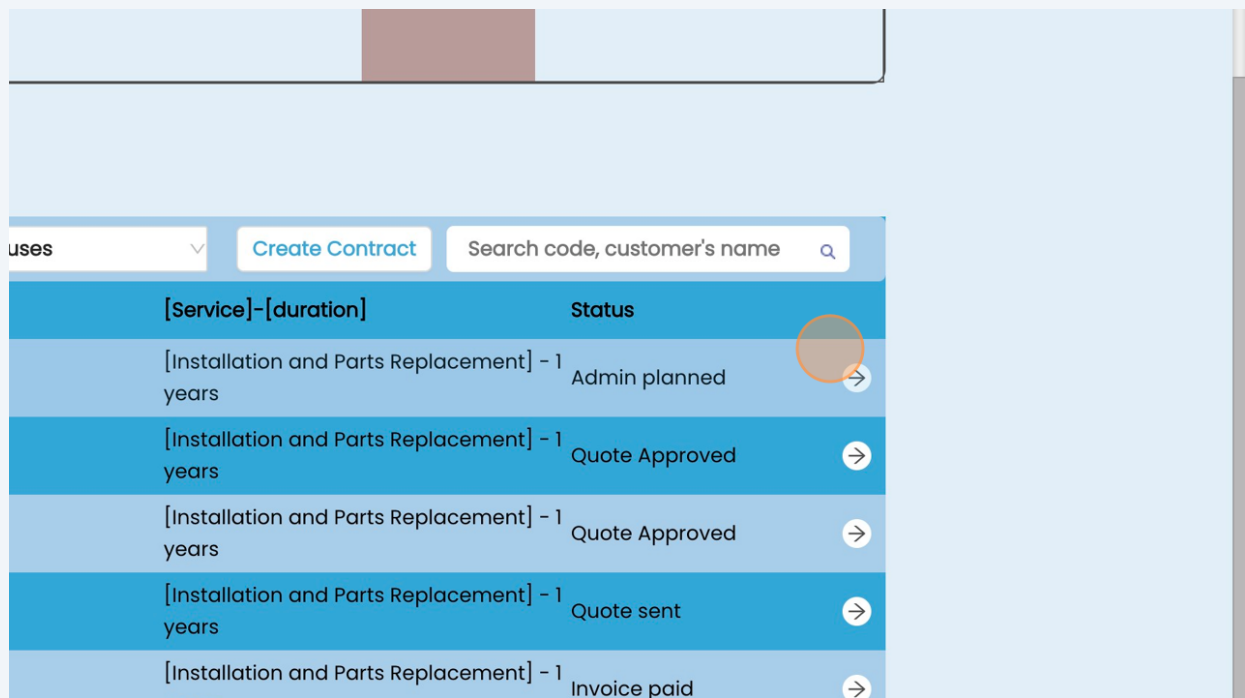
- City: [Empty]
- Country: [Empty]
- Appointment Date: 14/12/2023
- Type Of Service: Chemical Wash
- Assign Technician: Jimmy Tan

Buttons: View Quote, Save, Send Booking Details.

Quote Attached: QT0396

To assign for recurring/contract bookings

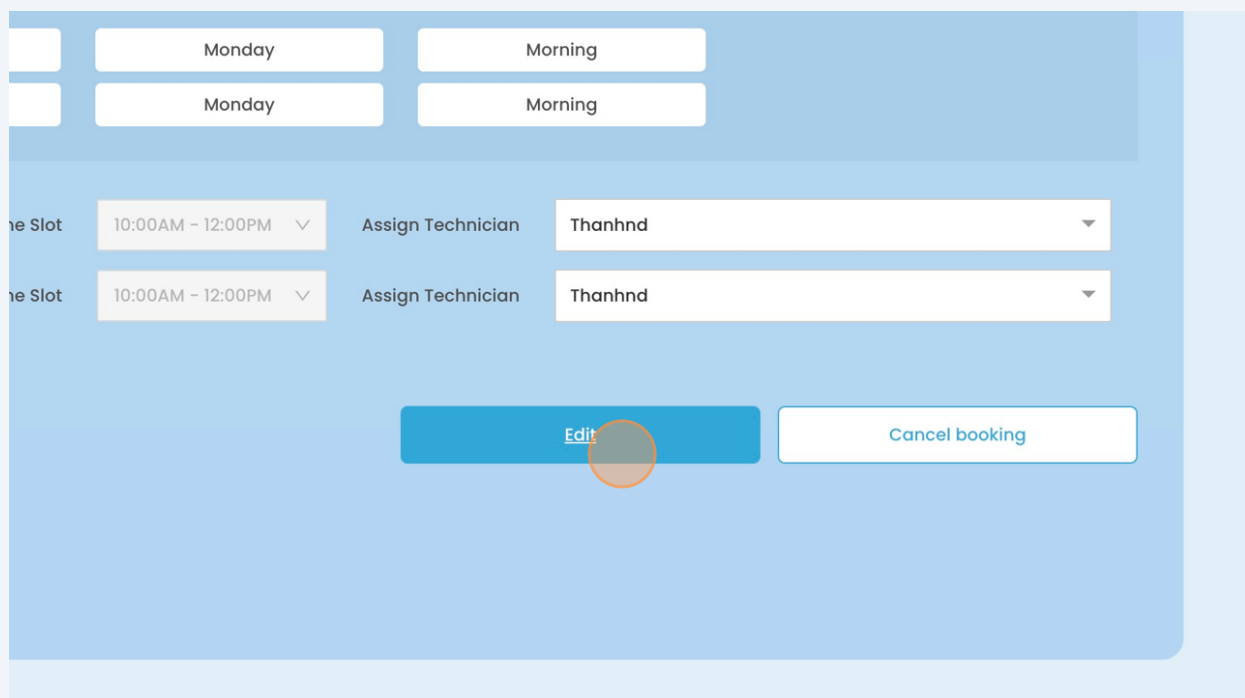
4 Select a contract booking that is under "Admin Planned" or "Self Planned" Status



The screenshot shows a web interface for managing contract bookings. At the top, there is a search bar with the placeholder text "Search code, customer's name" and a "Create Contract" button. Below the search bar is a table with two columns: "[Service]-[duration]" and "Status". The table contains five rows of data. The first row, "[Installation and Parts Replacement] - 1 years" with status "Admin planned", is highlighted in blue. A red circle is drawn around the right side of this row, specifically over the right arrow icon. The other rows have statuses of "Quote Approved", "Quote Approved", "Quote sent", and "Invoice paid", each with a right arrow icon.

[Service]-[duration]	Status
[Installation and Parts Replacement] - 1 years	Admin planned
[Installation and Parts Replacement] - 1 years	Quote Approved
[Installation and Parts Replacement] - 1 years	Quote Approved
[Installation and Parts Replacement] - 1 years	Quote sent
[Installation and Parts Replacement] - 1 years	Invoice paid

5 Click "Edit"



The screenshot shows a web interface for editing a booking. At the top, there are two rows of buttons for "Monday" and "Morning". Below these, there are two rows of "Time Slot" dropdown menus, both set to "10:00AM - 12:00PM". To the right of each time slot is an "Assign Technician" dropdown menu, both set to "Thanhnd". At the bottom, there are two buttons: "Edit" and "Cancel booking". The "Edit" button is highlighted with a red circle.

Monday Morning

Monday Morning

Time Slot: 10:00AM - 12:00PM Assign Technician: Thanhnd

Time Slot: 10:00AM - 12:00PM Assign Technician: Thanhnd

Edit Cancel booking

## 6 Select a technician from here

The screenshot shows a booking interface with two rows of time slots. Each row has a date selector set to 'Monday' and a time slot dropdown set to '10:00AM - 12:00PM'. To the right of each time slot is an 'Assign Technician' label and a dropdown menu. The first dropdown menu is open, showing a list of technicians: 'Thanhnd', 'Bach le', 'Jimmy Tan', 'tech mot', 'Ty', and 'Thanhnd'. An orange circle highlights the 'Bach le' option in the list.

## 7 Click "Save"

The screenshot shows the same booking interface as in step 6. The 'Assign Technician' dropdowns are now closed, with 'Bach le' selected for the first time slot and 'Thanhnd' selected for the second. At the bottom of the form, there are two buttons: a blue 'Save' button and a white 'Cancel booking' button. An orange circle highlights the 'Save' button.