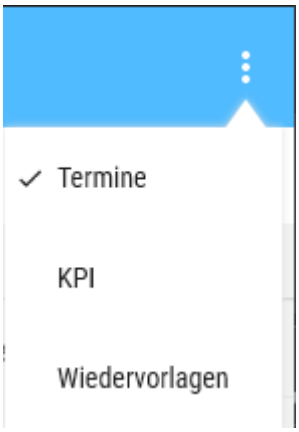
Client - Calendar management

- Display Upcoming Day Appointments
- Drag & Drop
- Map
  - Create tour via map
  - Create tour using radius search

Display Upcoming Day Appointments

On the dashboard, you can permanently display all appointments for the current day. Overdue appointments or appointments after today are not displayed.

Display the Calendar management by opening the kebab menu and ticking Appointments:



Drag & Drop

An appointment can be moved directly via Drag & Drop without opening or editing it.

To do this, **press and hold (Longpress)** the desired appointment with the mouse or touch. The appointment will be highlighted in light grey and can then be dragged to the desired Item.

View Month:
The appointment is moved to another Day, the Time remains unchanged.

Day and Weekly Overview:
The appointment can be moved in 15-Minute Steps to another Time or Day.

Map

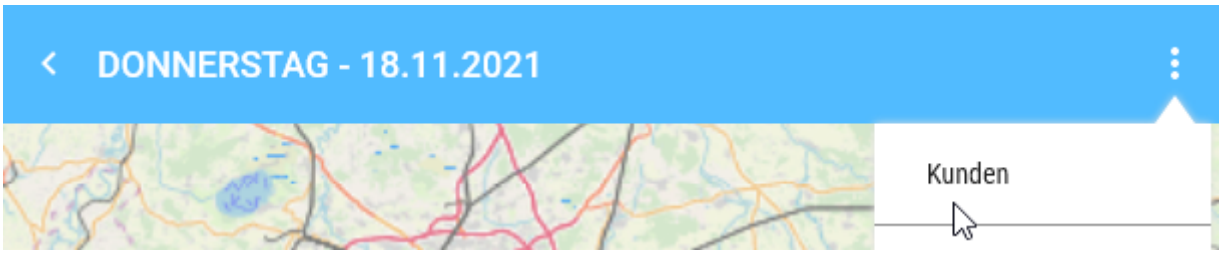
Create tour via map

You click on the lower right area "Map" in the 4x2 widget. If coordinates have been provided for you via the backend, the item is approximately in the middle of the window.

You can zoom in or out on the map using the mouse wheel or finger gestures.

Customer names are no longer displayed when there are more than 1000 customers.

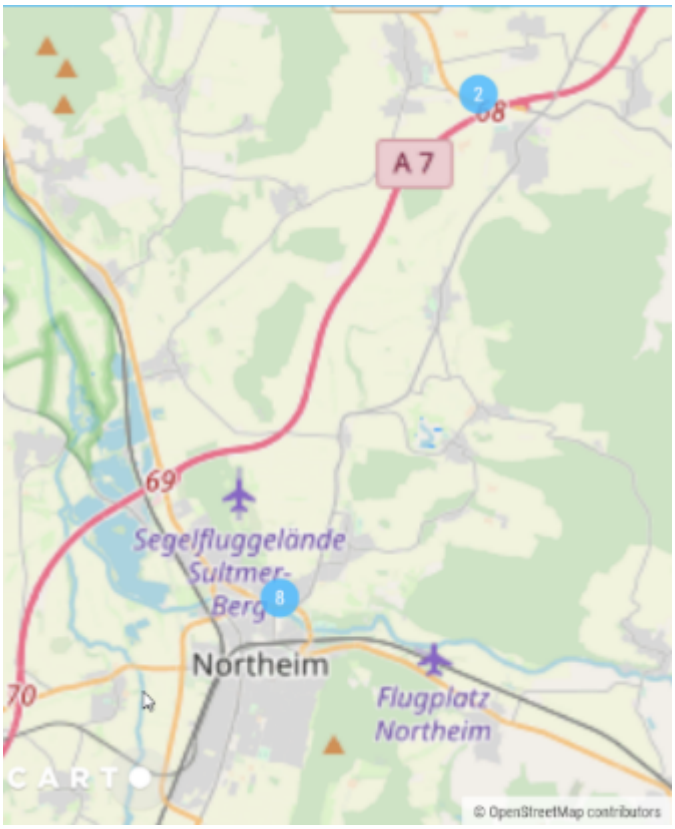
In portrait mode, you only see the map. Here you then click on the menu at the top right and select a customer via "Customers".



In the following window, you enter the criteria for your Customer Search. This can be done by name, but for example also by the first two digits of the postcode. The search starts immediately upon input. If you want to see all customers, press ENTER once.

Only active customers are considered in the search.

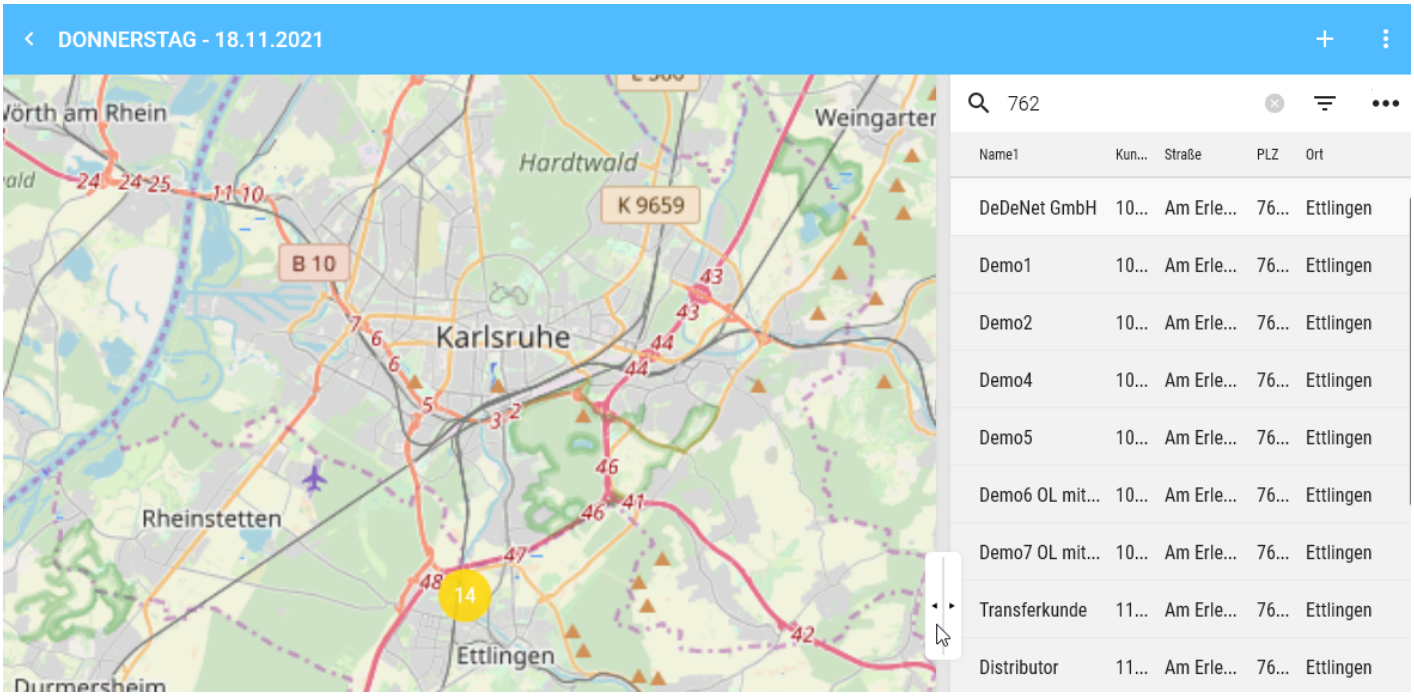
If you are satisfied with your search result, switch back to the map by pressing the Back button at the top left.



You now see your selected customers on the map (the map may need to be scrolled a bit if the type is too small).

The numbers in the circles indicate how many customers are at this location. Zooming in on the point on the map will show you more details accordingly.

If your screen is large enough, the picture is displayed split directly and you do not need to go via the "Customers" menu. On the left side you see the map and on the right side you can select the corresponding customers.



The arrows in the transition (see mouse cursor) give you the option to switch the view, for example, to display only the selection list. From version 21 onwards, the view can be freely moved by holding down these arrows. The position is saved automatically.

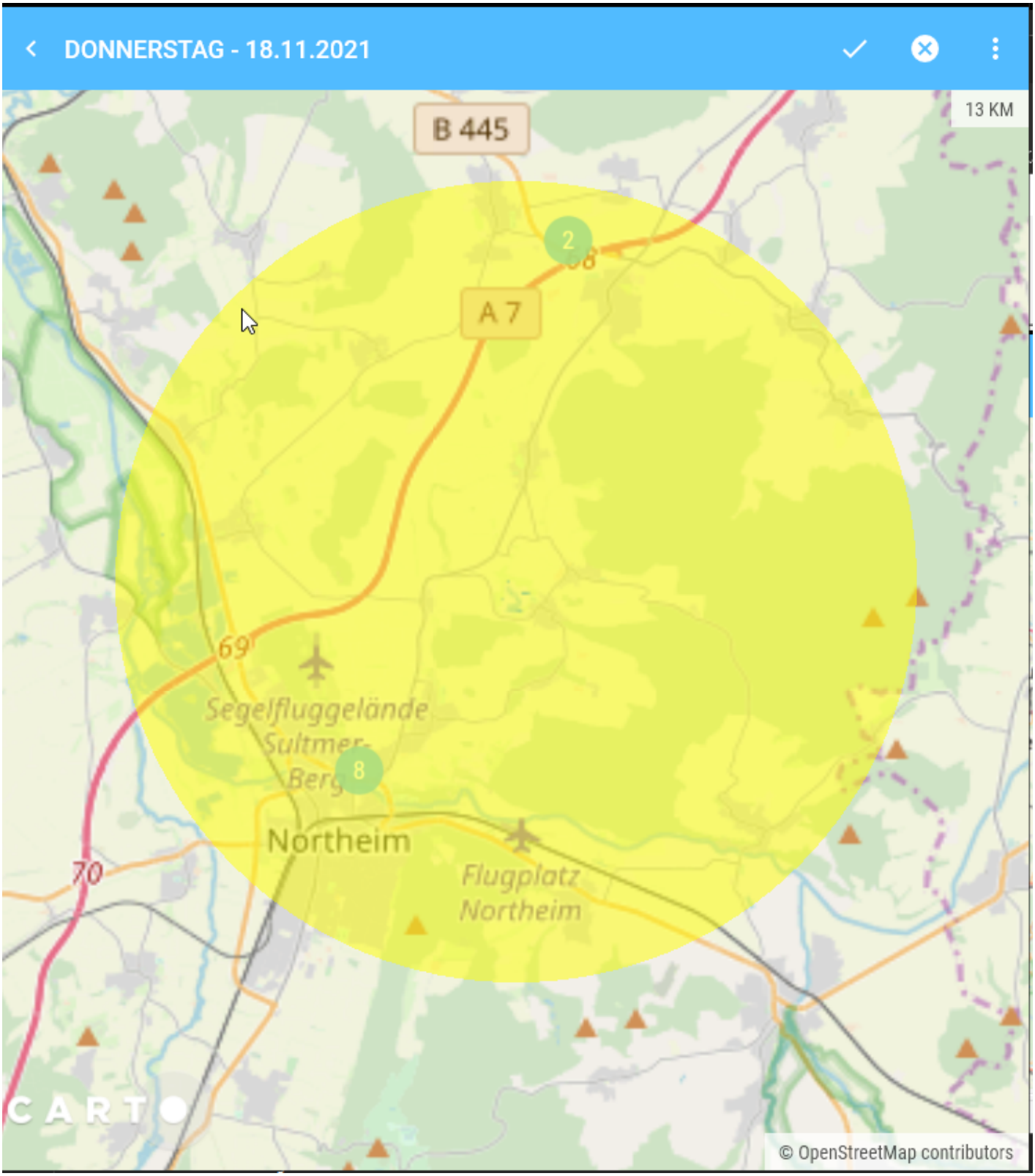
If there are too many customers at one ADDRESS (see yellow 14 at the top of the picture) and you cannot zoom further into the map, click on the corresponding number and a window opens with the customers located there.

The desired customer can be selected by clicking on the line.

Create tour using radius search

Once you have entered the first Search Term, you can also Select customers via the radius search on the map. To do this, click on the + that appears in the menu and place the mouse pointer on the map. (If your screen is too small, you must leave the search mask using the Back button.)

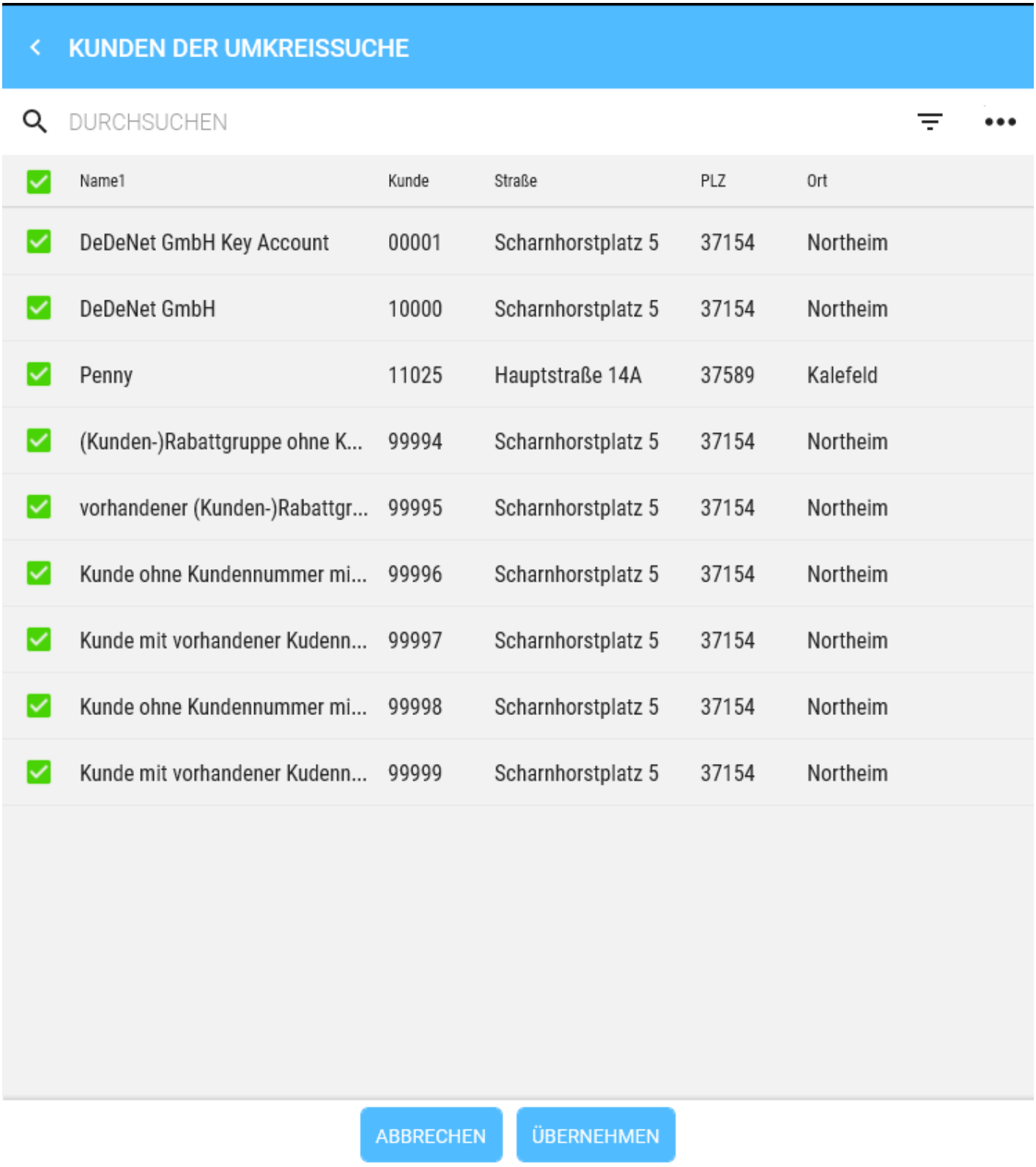
Hold down the left mouse button here and draw a circle.



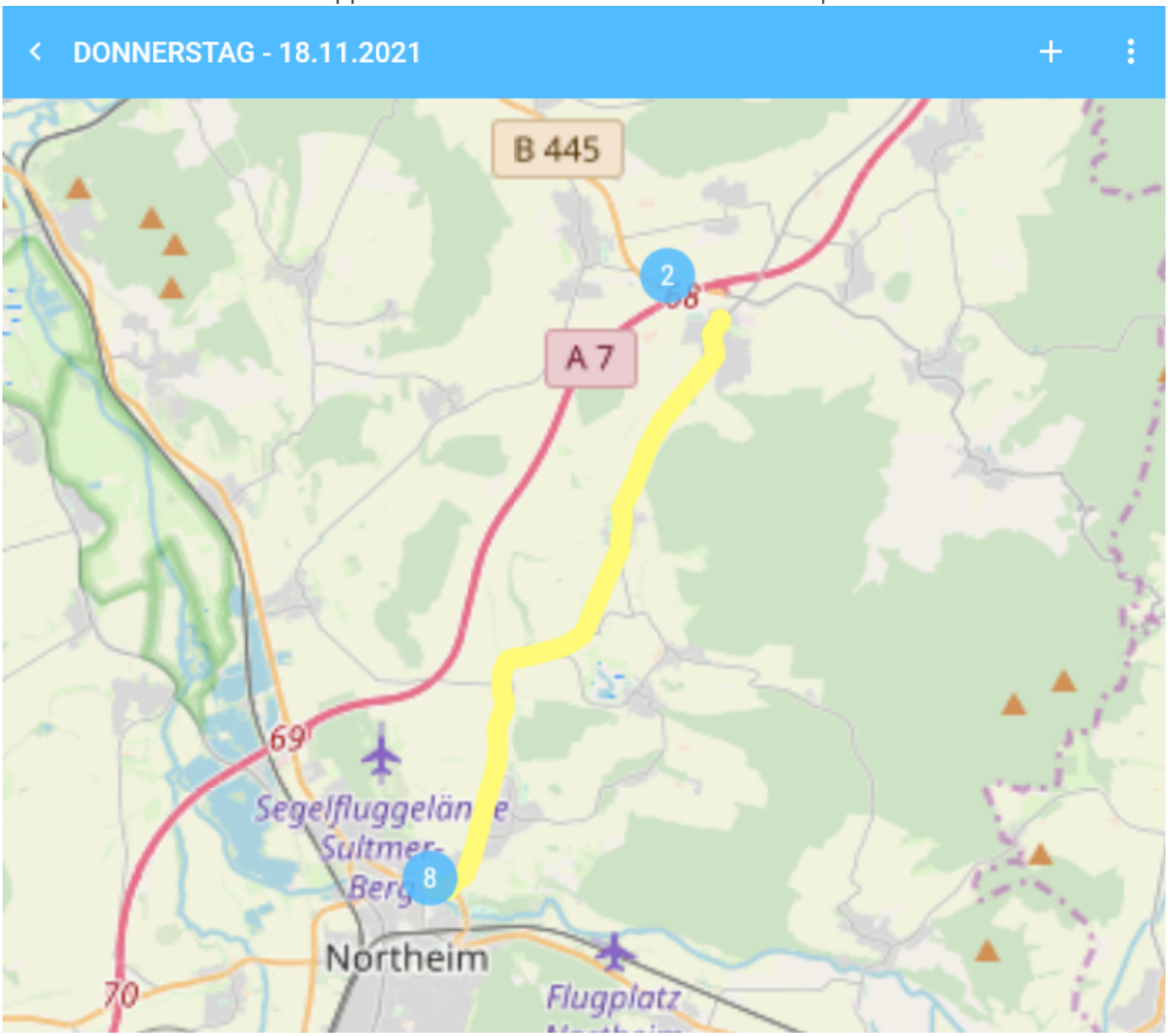
You can see the radius currently selected at the top right of the screen.

- You can confirm the selection with the tick.
- You can cancel the circle with the X. If you then want to draw a new circle, you must press the + button again.
- You can draw a new circle with the left mouse button.

Click on the tick if you are satisfied with your selection. You will then enter the menu of Customers who are within your radius search.



In this Summary you can still Delete individual Customers who should not be considered during the Apply.

Press the Apply button to insert the Customers into the Calendar management. If you want to perform a new search, then select the Cancel button.

It takes a moment and the Appointments will be transferred to the map