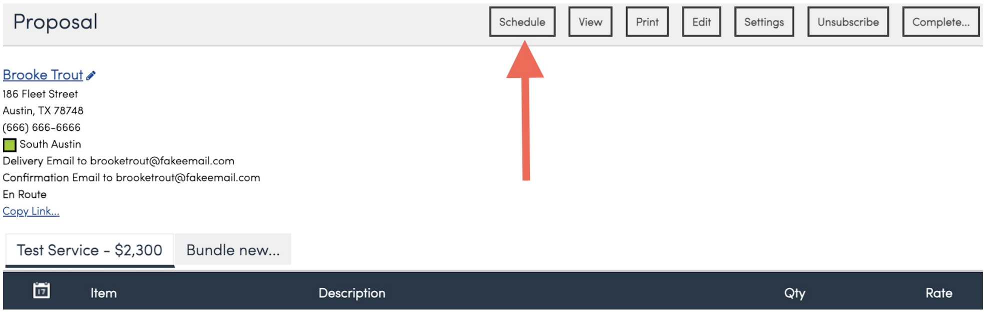
About Scheduling

04/03/2025 8:56 am CDT

Overview

When it is time to schedule an appointment on the calendar, there are a few places you can go depending on your workflow. Scheduling appointments can happen on the Appointments Grid, on a Contact Detail Page, directly on an Accepted Proposal, or from the "Schedule an Appointment" shortcut.

Whenever there is an accepted Proposal, we recommend using the Schedule button directly from the Proposal details page. This will carry forward all information from the Proposal to the Appointment, and eventually to the Invoice.



Settings and Navigation

You can configure master settings for Scheduling in **Control Panel > Scheduling** or on individual services in **Control Panel > Services**.

To learn more about these settings you can view the following articles:

- Scheduling Settings
- Service Scheduling Options

How Slot Searching Works

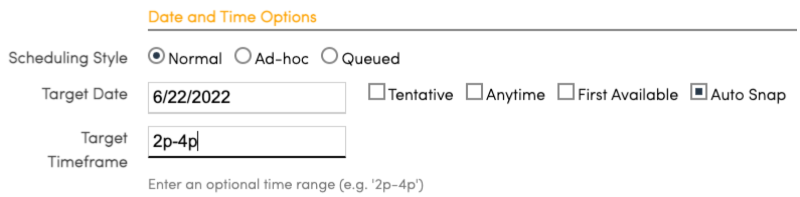
When you are creating an appointment and assuming a contact is selected (so service**minder** knows where the appointment is going to be), it will go look for all active/available service agents starting at the initial appointment start date and who has timeslots that are in the same service role as the service you selected. For example, if you selected an Estimate appointment, it might go return timeslots for any agents who have Sales timeslots available. The dates and times returned will be the ones available based on holidays, time off and other appointments, as well as drive time between adjacent appointments. Only the slots that are truly available and can be booked will be shown.

If you get "No slots are available," there can be a few common reasons why:

- Nobody has any time slots available with the same Role as the service you selected
- The duration of the appointment is larger than any available time slots
- The contact is missing an address or the address is not geocoded
- Lead time days for scheduling settings or the individual service settings is pushing

appointment slots too far out to see

Choose a Scheduling Style



Normal

This means "default". The default setting in service**minder** is connected to the organization's scheduling settings located in **Control Panel > Scheduling**.

Ad - hoc

Ad-hoc appointments allow you to schedule appointments outside of the defined availability (i.e., schedule an employee on a day they are normally off, or assign them to an appointment with a Sales role when they are usually Service role agents). You can check the Ad -hoc box, select the exact date and time, then pick the Service Agent.

It is important to note that Ad-hoc will still check for conflicts and drive time for adjacent appointments. When an appointment won't book in the Ad-hoc style, this is typically the reason.

Queued

Appointments that are queued are just given a target date and then saved as a queued appointment. There is no communication to the customer about the appointment and it's not assigned to a service agent. It does not take up any "appointment bandwidth" -- it's simply a placeholder or "to do" item.

The most common use for this type of appointment is when you want to collect enough appointments up before making a schedule, typically due to geographic efficiency. You can then schedule queued appointments using the Backlog Scheduler where you can filter to see just Queued appointments and then manually route them in the most efficient order for drive times. You can also use our Routing Add-On feature to automate the routing process for queued appointments.

You can also schedule a queued appointment by editing it and then choosing a desired slot, using Ad Hoc to schedule it for a specific agent and time, or dragging and dropping it on the calendar. An appointment will only successfully 'drop' when it's been dropped on an available time slot.

More Scheduling Options

Tentative

The Tentative checkbox allows you to book the appointment (queued or scheduled) without sending a confirmation to the customer or service agent. A good example is when you think the date/time for the appointment is a best guess -- you don't want to commit yet but you still want to hold the time for the appointment.

The appointment will still be visible on the calendar (and will show up in italics to indicate it is tentative) and will show up on the service agent's schedule. Any time you move or reschedule the appointment, it won't send confirmations. When you're ready to lock in the appointment, you can edit it to clear the Tentative checkbox. You can also click the "Commit" link at the bottom of the calendar (Day view). Confirmations will get sent then.

Anytime

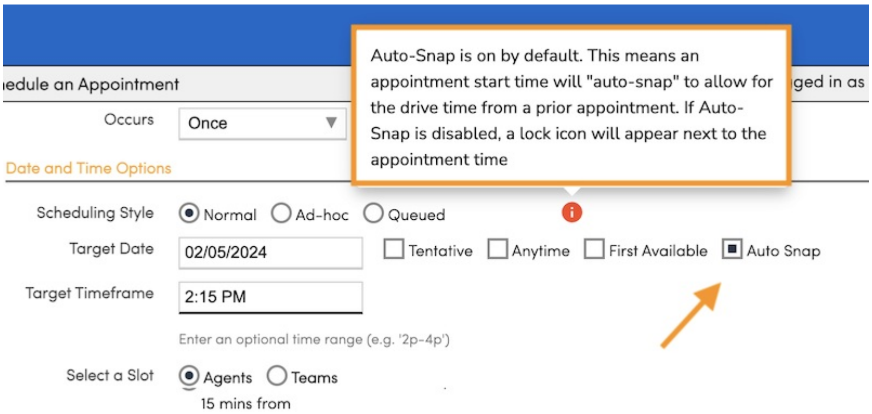
This is just an annotation and doesn't affect scheduling or slot searching. It is just used as an indication that the customer would like an earlier time that day if one opens up. The First Available setting is shown in the Appointments grid so if you have a cancelation, you can use that as a way to find someone who might have a flexible schedule.

First Available

Ad-hoc appointments allow you to schedule based on when the first appointment is available for that day.

Auto Snap

Auto-snap is a feature that automatically adjusts appointment start times to be as soon as practical (given configured drive time constraints) when dragging and dropping in Team view (or selecting the Snap action).



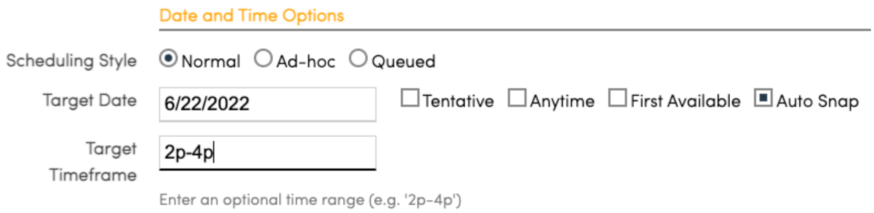
Auto-snap is on by default for all services but can be disabled for specific services by editing the service and unchecking the Auto-snap box. For example, for your Estimate services, where you are meeting clients at specific times would typically have Auto-snap off. Services that can be done at any time will typically leave Auto-snap on.

If you have services that need to work both ways, you can set the Auto-snap for the service to match the most common case, then when scheduling the appointment, you can change the Auto-snap checkbox just for that appointment. And if you need to change it later, you can edit the appointment to toggle the setting.

If Auto-snap is disabled for a service or an appointment, we'll display a lock icon next to the time on the appointment. To clear it, edit the appointment and re-check the auto-snap box.

Target Timeframe

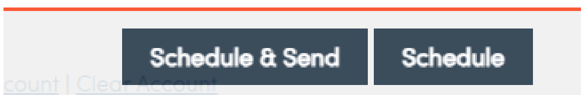
This is used to search for available slots within a window of time, instead of searching for one set start time. I.e. search for slots between 2:00 and 4:00 pm instead of just at 2:00. A user may type-in a desired time or use the "spinner" to choose a time.



> If you want to display a timeframe to your customer on confirmation emails instead of the set start time, you can use shortcode filters to put together a timeframe to use in appointment emails and texts.
>
> Example: For an appointment that starts at 11:00am, you can set up a "window" to show to the customer in the confirmation email instead. The below shortcode would show as 10:00am - 12:00pm instead.
>
> **{appointment.scheduled-start|addtime:-1:hour|short_time} - {appointment.scheduled-start|addtime:1:hour|short_time}**
>
> Another option is to use our approximate start shortcode, which will display a friendly approximation, like "Monday morning" or "Thursday afternoon."
>
> **{appointment.date_approximate}**

Schedule and Send vs. Schedule Buttons

When you have the appointment ready, you have two button options.



When creating the appointment, clicking **Schedule and Send** will:

1. Place the appointment on the calendar

2. Immediately send the selected email addresses an Appointment Confirmation.
   - This only happens if **Control Panel > Notifications>Appointment Confirmation** is turned on. Please review User Notifications to view all.
   - If that master setting is not checked in Control Panel>Notifications nothing gets sent.
   - If reminders have been enabled, they will be scheduled to go out based on default settings.

If you only click **Schedule**, no Appointment Confirmation is sent by default. In order to send a confirmation for this appointment manually, you would need to:

1. Use the **Resend Notifications** button at the bottom of the calendar

2. Use an Ad Hoc Email template by clicking on the “Email” button in the appointment.

3. If you have the master setting checked for Appointment Confirmation in Notifications, you can click the “Send” button.

Alternate Address

Many businesses have situations where an appointment with a contact (prospect or customer) needs to be at a location different than the contact's location:

- Meeting a customer to choose something for a project - at a design store or stone quarry
- A series of cooking class appointments, where one class meets at an outdoor market rather than at the client's home

Choosing an alternate address is a relatively easy process in service**minder.**

1. Schedule (save) the Appointment or series of appointments

2. Go to the appointment (do not hit Edit)

3. Choose the edit pencil icon next to "Where" location line

4. The "Set Alternate Address" screen appears

5. Enter your Alternate Address and Save

6. Want to revert it back to the contact location? You'll see a "Clear" button next to the "where" on the appointment.

7. The system will ask you if you are sure. Choose "Yes".

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FAQs

Is there a way to have a hard coded setting in scheduling to have an hour in between appointments?

Not at the moment, but another option you could try is to set up the open-time granularity to 20 or 30 minutes (as an example). It would push the slot options out a little later which may help.

Open time granularity can be set by going to **CP > Scheduling > Scheduling** option section > open time granularity.

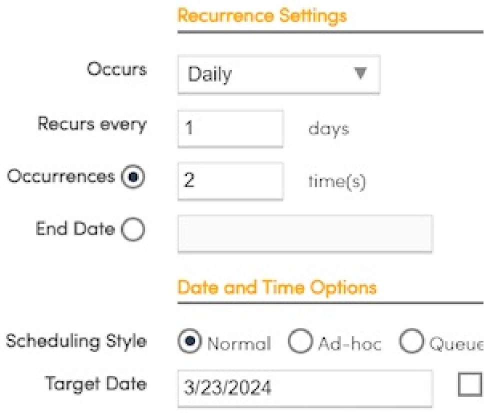
How do I organize it so appointments are only available to start at the top of the hour?

Use the open time granularity setting and adjust to be 60 minutes. Then you will only see every hour that is available.

What is the most efficient way to schedule a 2-day appointment so there would automatically be 2 appointments scheduled but the invoice would follow the tech?

There's a way to do it if scheduling from a proposal. If the **Invoicing Mode** is set to **Via Appointments w/ Carry Forward** then the pricing will move from appt to appt, and invoice when the final appointment is done.

If just scheduling directly, there's not a way to automate it like that. But you can do a recurring appt with settings shown below so they're connected in a chain, and then make sure the pricing is only on the last appointment. The first appointment could be set to $0.



Is there a way to customize the questions / information being collected on the form on the email scheduler?

There is not currently, apart from the settings that are listed in **Control Panel > Scheduling**. Only services marked as "self-service" will show up. Then they can select if they want to allow account creation, cancellation settings, require a payment, etc.

Does clicking the box for Queued Confirmations on the calendar only pause the reminders? Or does it also hold the original appointment confirmation?

"Queue Confirmations" does not catch appointment reminders.

If you only click Schedule, do Appointment Reminders also not get sent?

No, nothing is sent automatically for that appointment if you only push the Schedule button. You can "resend" the confirmation and that will make reminders automatically send.

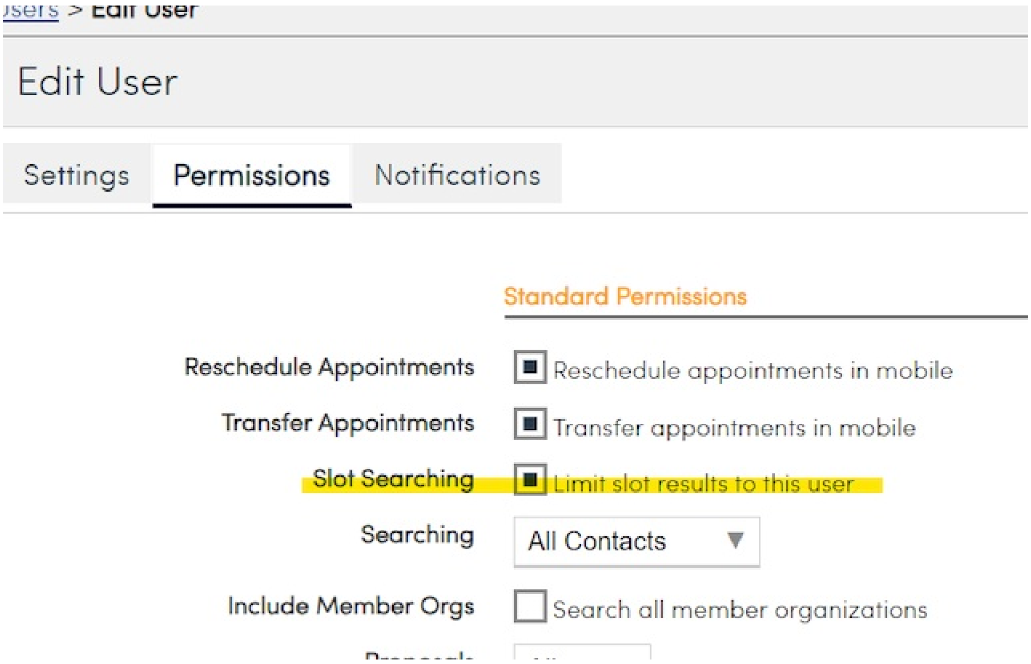
Troubleshooting

I am not seeing availability when I go to schedule.

Go to **Control Panel > Scheduling > Appointment Window**. This may be happening because the value for 'Appointment Window' is set to 0. This was telling serviceminder to not return any appointment day availabilities. By putting in a value there, this tells SM to return appointment availabilities up to # many days out.

There are no slots showing up for a user.

Double check that the Contact has an address saved on their profile. service**minder** won't return slots unless there is one, since drive time and distance have to be calculated.



I am only seeing MY availability when I go to schedule, not all slots for all service agents or salespeople.

If a particular User is having issues seeing all Slot results, then go review their permissions (**Control Panel > User > Permissions** tab. If this is turned on, then whoever is logged in will only see slots for themselves.

How come I can't add a queued appointment to the schedule without having to manually change the date?

Make sure that you are doing the following:

1. Hover over dots to the left of queued appointment in the 'Queued Appointments' section until the cursor turns to a multidirectional arrow icon
2. Click and hold to grab the appointment
3. Drag the appointment to a selected team. A good indicator is to drag the appointment to the team area with agents. Seeing the background change from white to grey should indicate your selected team
4. Drop appointment to that team
5. Select **Update** in bottom right corner
6. Confirm Update once more selecting 'Update Teams'