

About Scheduling

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Overview

This article provides a comprehensive overview of appointment scheduling in ServiceMinder. It includes available scheduling styles, configuration settings, notifications, and troubleshooting tips. Whether you're an office admin, sales manager, or service agent, this guide will help you navigate scheduling workflows efficiently.

This article will review:

- [Settings and Navigation](#)
- [Date and Time Options](#)
- [Slot Searching & Availability](#)
- [Editing Appointments](#)
- [Notifications](#)
- [Alternate Addresses](#)
- [FAQs](#)

Settings and Navigation

Appointments can be scheduled from several interfaces depending on your workflow:

- **Accepted Proposal Page** (recommended — this carries proposal information forward)
- **Appointments Grid**
- **Contact Detail Page**
- **"Schedule an Appointment" shortcut**

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](#)

Date and Time Options

Schedule an Appointment

Date and Time Options

Scheduling Style

☒ Normal
 ☐ Ad-hoc
 ☐ Queued

Target Date

☐ Tentative
 ☐ Anytime
 ☐ First Available
 ☒ Auto Snap

Target Time

Slots available at/after this time

Select a Slot

☒ Agents
 ☐ Teams

☐ Wed, May 14, 2025 at 7:00a with Demo Agent
15 mins from Plano 75093

Scheduling Styles Comparison

ServiceMinder supports multiple scheduling styles based on use case.

Scheduling Style	Assigns Agents	Sends Confirmation	Uses Availability	Holds Time Slot	Description
Normal	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> if enabled	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Default method using set availability and role-matched slots.
Ad-Hoc	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> if enabled	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Ignores normal availability. Still checks for conflicts and drive time.
Queued	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Saves as placeholder. Used for batch routing or backlog scheduling.
Tentative	<input checked="" type="checkbox"/>	<input type="checkbox"/> until committed	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> <i>italic</i>	Holds slot without notifying customer or agent. Confirm by clicking Commit.

Anytime

A **visual note only** — it doesn't affect scheduling logic. It signals that the customer is open to **earlier times** that may become available that day but doesn't trigger slot prioritization or alerts.

First Available

Indicates that the customer is flexible and wants the **soonest available appointment**. It acts like a waitlist priority and appears in the **Snapshots > At a Glance > First Available** list as well as in the **Appointments** grid to help fill cancellations quickly.

Auto-Snap

- **Auto-Snap is on by default** and ensures appointment times align with drive time and routing.
- **If Auto-Snap is disabled**, a **lock icon** appears next to the time on the appointment details. This indicates the time is fixed.
- Appointments made with **Ad-Hoc mode and Auto-Snap disabled** are locked in time — dragging to another day keeps the same start time.
- To remove the lock:
 - Edit the appointment

- Enable Auto-Snap
 - Save the appointment
 - Services can be configured to disable Auto-Snap by default via **Control Panel > Services > Edit > Scroll to Scheduling > Uncheck Route Optimize**
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Slot Searching & Availability

When scheduling an appointment:

- **Contact address must be present** for slot search to work (used for drive time).
- ServiceMinder searches for available slots:
 - Matching the **service role** (e.g., Sales or Service)
 - Considering **lead time, time off, holidays, and existing jobs**

Common "No Slots Available" Issues:

- No agents have matching role availability in their schedule
 - Appointment duration exceeds available slots
 - Contact lacks address or it's not geocoded
 - The drive time between appointments is too long to fit in that time slot
 - Lead time or Appointment Window is too restrictive
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Editing Appointments

- Edit directly from the **Appointments Grid** or **Appointment Detail Page**
 - You can update: Date/time, assigned agent, service, auto-snap, etc.
 - **Recurring chains:** Changes can apply to one or all future appointments
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Notifications

Schedule and Send

- Schedules the appointment **and** sends automated confirmations (if enabled under **Control Panel > Notifications**).

Schedule Only

- Places appointment on the calendar without notifying the customer.
- Use "Resend Notification" or manually send an ad hoc email at a later time.

Schedule & Send

Schedule

Alternate Addresses

Sometimes you may need to schedule design consultations at vendor sites, offsite training, or one-time

appointments at a different location. To set a different appointment location:

1. Create and save the appointment.
2. Click the pencil icon next to the "Where" field.
3. Enter a new address or click **Clear** to revert to contact address.

Queued Appointment

[Print](#) [Move](#) [Edit](#) [Cancel](#) [Delete](#)

Contact	Fred Rogers 	Primary Phone	(143) 143-1432
Service	Test Service	Where	4802 E 5th St. Austin, TX 78702  Copy
Queued for	Thursday, August 7  <input type="checkbox"/> Confirmed	Service Agent	unassigned
Scheduled Duration	1 hour 20 mins (1 man-hour 20 mins)	Actual Start	Not started
Quantity	1		

FAQs

Q: Can I set buffer time between appointments?

A: Not directly. Adjust **Open Time Granularity** under Control Panel > Scheduling to push slots further out.

Q: How do I make appointments only start on the hour?

A: Set **Open Time Granularity** to 60 minutes.

Q: Can I automate a two-day appointment with linked billing?

A: Yes, if created from a Proposal with Invoicing Mode set to "Via Appointments w/ Carry Forward."

Q: Can I customize scheduler form questions?

A: No, only basic self-service toggles are supported in Control Panel > Scheduling.

Q: Why am I only seeing time slots for myself?

A: Check your User permissions and uncheck the box for "Limit Slot Results to this User"