# **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**



### **Scheduling Styles Comparison**

ServiceMinder supports multiple scheduling styles based on use case.

| Scheduling<br>Style | Assigns<br>Agents | Sends<br>Confirmation   | Uses<br>Availablity | Holds<br>Time Slot | Description   |
|---------------------|-------------------|-------------------------|---------------------|--------------------|---|
| Normal              | <b>V</b>          | ☑<br>if enabled         | <b>V</b>            | ~                  | Default method using set availability and role-matched slots.               |
| Ad-Hoc              | <b>V</b>          | ☑<br>if enabled         | ×                   | ~                  | Ignores normal availability. Still checks for conflicts and drive time.     |
| Queued              | ×                 | ×                       | ×                   | ×                  | Saves as placeholder. Used for batch routing or backlog scheduling.         |
| Tentative           | <b>▽</b>          | ×<br>until<br>committed | <b>\</b>            | ☑<br>italic        | 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

- o Enable Auto-Snap
- Save the appointment
- Services can be configured to disable Auto-Snap by default viaControl Panel > Services > Edit > Scroll to
   Scheduling > UncheckRoute Optimize

### **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)
  - o 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

### **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

### **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.

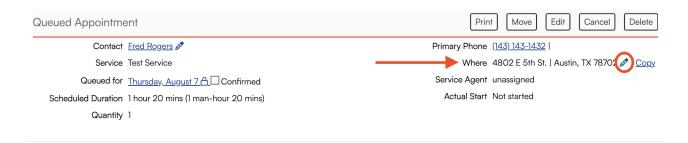
Schedule & Send Schedule

### **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.



### **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"