Scheduling in Teams Mode

12/30/2024 12:23 pm CST

Overview

Teams are a way of grouping individual service agents together if you have multiple agents that work appointments. The simplest way of doing it is creating a "vehicle/truck" within service**minder** then placing agents into that truck. You can have the same team working together each day, or have different agents assigned to that truck each day.
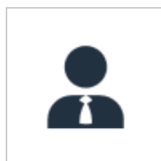
> This article will review:
> - Settings and Navigation
> - Create a Team
> - Schedule a Team
> - Edit the Team State
> - FAQs

Video Tutorial

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Settings and Navigation

You can find settings for Teams under **Control Panel > Service Agents**.

Service Agents
Manage resource scheduling and availability.

Create a Team

The first step in creating a team is to make a Service Agent that will be designated as the "lead agent" on the team. In the example below, we will create the Mystery Machine. To do this, go to **Control Panel > Service Agents** and click **Add** in the top left corner.

You will want to set up an agent as a piece of equipment. Think of this as a service vehicle or a placeholder for who will be in that vehicle each day (even if you do not have a company car). You need to have a category or a "lead agent" that your actual technicians will be attached to for the schedule.

Give this agent the same name that you want the Team to have. The **Kind** should be **Equipment**.

Then scroll towards the bottom of the page to provide a schedule for this agent. Provide the days and times you want this team to be available. Set the **Role** to **Service**.

> ℹ️ You can make the role "Sales" if you are setting up an In-Home estimate route, but that is usually reserved for a single agent, not a team.

Once the equipment service agent has been created, go back to the Service Agents grid and click the **Team** button in the top right corner of the screen.

You will want to create a team that is named the same as the equipment. Mark the Team as active and provide a brief description.
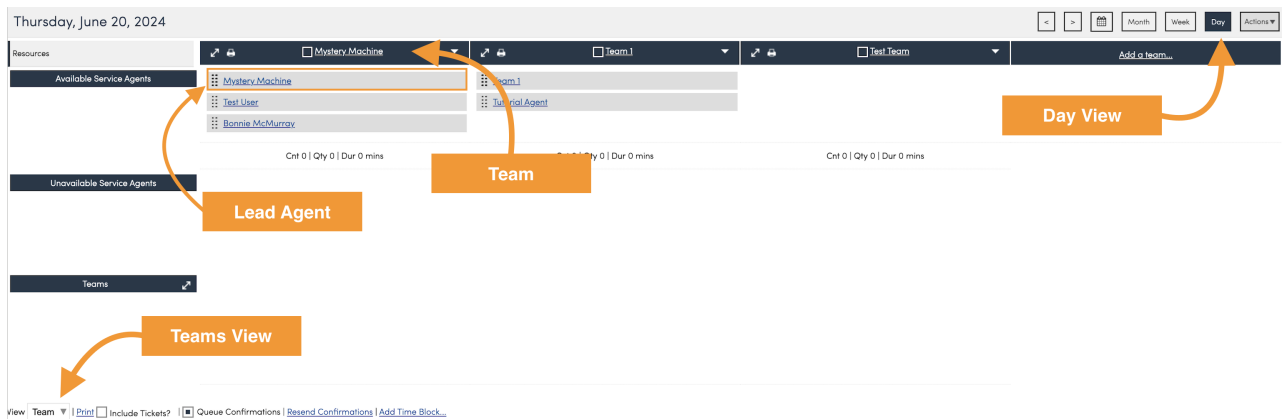

Schedule a Team

To schedule a team, go to the calendar in the top blue menu bar. This where you will put your teams together for the day.

Switch to see the current day and make sure you are in **Teams** view at the bottom of the page.

1. Drag and drop your equipment agents under the corresponding Team name by clicking on the array of dots on the left side of the agent card.

2. Arrange the agents you want under those equipment agents.

See how Shaggy, Scooby, and Velma are under the Mystery Machine under the Team labeled "Mystery Machine".
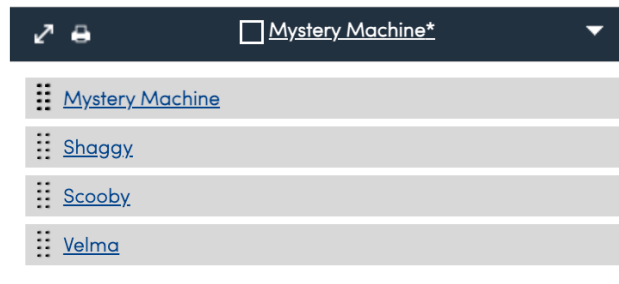
✅ You can save these teams as is if your groups work together frequently, or you can assign different agents to each team when scheduling the appointment.

You can always go back and drag and drop different agents into the teams on the calendar if last-minute changes are needed.
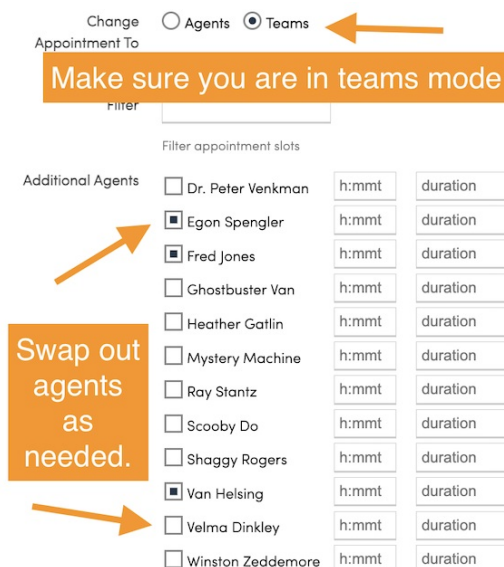
Edit the Team State

If you go to the team (you can click the team name when on the day view to open it) it gives you a timeline of the "states" of that team, past and future.

If you have high enough permissions level, you can click **Delete Future States** in the upper right which basically resets it after the next day. So if you've shuffled agents around on teams a lot and it's gotten kind of messy, you can do this to reset them. When you update your teams again, it'll set new future states.

Auto Optimize on Teams

This is done automatically if this option is selected for a Service. If you don't want the scheduled times to be altered when other services are added to the schedule, this setting can be disabled in Control Panel > Services > Edit .

Sort Order

Many organizations not only want efficient routes, but also to have the same Service Agent on the same property from cycle-to-cycle. This guide will help you set up (and keep) your Service Agents in order daily so they generally get the same customers and geography while allowing the routing engine in Service Minder to remain efficient.

The order of Teams and hence Service Agents is determined by the Sort Order field on a Service Agent. If no Sort Order is present, it will use the last name alphabetically.

When adding sort orders, 0 is first and 9 is last. The Teams are then sorted by the team's lead (first) service agent's order, then lastly by the team's name. If no orders are set on any Service Agents, SM will sort by team names.

FAQs

How do I delete a Team?

You cannot directly delete a Team. The reason being that there may be prior appointments attached to that team and reporting information will be deleted along with it. You can make the teams "Inactive", which effectively does the same thing without losing the reporting data.

If you have access, you can go to **Control Panel > Service Agents** and select "Teams" option in the upper right corner of the screen. Select the Team you wish to Edit. You will see a checkbox for "Active?". Deselect that box to make the Team no longer appear for scheduling purposes.

Our service agents change what Teams they will be on each day What settings can I change so that they can only see the schedule for the day they are working on that Team?

You can edit these settings in **Control Panel > Users > Edit > Permissions >** Scroll down to **Schedule/Inventory Permissions**.

Troubleshooting

I adjust times or dates or teams and everything will switch after I save.

You may be updating the calendar and all (or most) of the appointments have "Auto Snap" setting turned on.

What happens is whenever you make an update on the calendar, if something was overridden before, auto snap kicks back in and will shuffle the appointments around again. If you are trying to place appointments at specific times, you need to edit the appointments and uncheck "Auto Snap" for those, then they won't move.

If you have checked these settings and it is still occurring (or only occurring for a specific Service), go review the Service that you are scheduling for. It may have "Auto Optimize" turned on.