Scheduling in Teams Mode

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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.

We will go into specifics, but here are the three things you need to understand about having a team to be available on a calendar:

- 1. A team will automatically appear on the calendar when it is created.
- 2. An agent (either person or equipment) has to have availability hours to be placed on the calendar.
- 3. The agent (either person or equipment) has to be placed on the calendar to be available for an appointment to be scheduled on that team.

This article will review:

- Settings and Navigation
- Create a Team
- Schedule a Team
- Edit the Team State
- FAQs

Video Tutorial

Your browser does not support HTML5 video.

Settings and Navigation

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



<u>Service Agents</u> 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.

Name*	Mystery Machine
Kind*	Equipment v
Email Notifications	Send emails when appointments are scheduled or canceled

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**.

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.

Role	Service V]					
Days Available*	Mon	🔳 Tue	Wed	🔳 Thu	🔳 Fri	Sat	🗌 Sun
Time*	From 8:00a	m	to 5:00pm				

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.

Name*	Mystery Machine
Active?	
Description*	Mystery Machine Team
Sort Order	1
	Teams will be sorted in ascending order by the above number first, and then by name

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.

Thursday, June 20, 2024									< > Month Week Doy Actions
Resources	28	Mystery Machine	~ 2 8	Team 1	•	28	Test Team	•	Add a team
Available Service Agents	Image: Mystery Mach Image: Test User Image: Bonnie McMu	ine rray Cnt 0 Qty 0 Dur 0 mins		n <mark>al Agent</mark> Cy 0 Dur 0 mins			Cnt 0 Qty 0 Dur 0 mins		Day View
Unovalidable Service Agents	Lead	Agent	TE	am					

- 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.

Change Appointment To	O Agents Teams		_
Make s	ure you are in	teams	s mode
Filter	Filter appointment slots		
Additional Agents	🗌 Dr. Peter Venkman	h:mmt	duration
-	Egon Spengler	h:mmt	duration
	Fred Jones	h:mmt	duration
	Ghostbuster Van	h:mmt	duration
	Heather Gatlin	h:mmt	duration
Swap out	Mystery Machine	h:mmt	duration
agents	Ray Stantz	h:mmt	duration
as	Scooby Do	h:mmt	duration
needed.	Shaggy Rogers	h:mmt	duration
	Van Helsing	h:mmt	duration
	Velma Dinkley	h:mmt	duration
	Winston Zeddemore	h:mmt	duration

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 .

	i i v
	Scheduling
Scheduling Mode	Normal
Service Role*	Service V
Queued?	
Self Service?	
Track Rework?	
Direct Schedule?	Allow scheduling appointments directly
Internal Accept?	Allow users to internally accept proposals
Seasonal?	Seasonal services enable the Renewals tool to automate seasonal renewals
Auto Optimize on Teams	
Limit to States	

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.

٤	Page 1	of 1 (15 items) 🛛 🕙 💽	1 🕑 🕑					
	<u>Add</u>	Name	User	Email	Phone	Sort Order	ctive?	In
	Edit	Dr. Peter Venkman		heatherg@se			Ye	IS
	<u>Edit</u>	Egon Spengler					Ye	IS
	<u>Edit</u>	Fred Jones					Ye	IS
	<u>Edit</u>	Ghostbuster Van					Ye	IS
	<u>Edit</u>	Heather Gatlin		heatherg@se	(000) 000-00.		Ye	IS
	<u>Edit</u>	In Home Estimate					Ye	IS
	<u>Edit</u>	Mystery Machine					Ye	IS
	<u>Edit</u>	Ray Stantz					Ye	IS
	<u>Edit</u>	Scooby Do			(000) 000-00.		1 Ye	IS
	<u>Edit</u>	Shaggy Rogers					2 Ye	IS
	<u>Edit</u>	<u>thing</u>					Ye	IS
	<u>Edit</u>	Van Helsing					Ye	IS
	Edit	Velma Diokley					Ve	10

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

Is the person who is lead on the team the only user allowed to start and finish appointments?

There is a setting in **Control Panel > General** for allowing additional agents the permission to start or finish the appointment. Scroll to the "Service Agent Settings" section and turn on **Additional Start/Finish**. If this box is unchecked, only the lead agent will be allowed to start or finish the appt.

However, please keep in mind that the user that starts the appt should also always be the one to click Finish. Having different users start and finish the appt will not work within the system.

Service Agent Settings

Hide Pricing on Tickets?	
If enabled, pricing will be hidden for Service Agents	
Additional Start/Finish? Can additional service agents start or finish appointments?	
Recent Appointments Window 14 The number of days back service agents can view their completed appoint	tmer

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.

<u>Service Agents</u> > <u>Teams</u> > Edit	Team	
Edit Team		
N	lame*	Ghosbusters
A	ctive?	
Descri	ption*	Who ya gonna call?

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**.

Future Visibility

The number of days a service agent can see ahead on their schedule.

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.