

Scheduling Settings

10/29/2024 10:35 am CDT

Overview

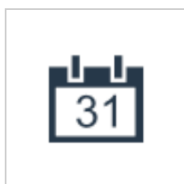
Scheduling configurations will determine the frequency of appointments you are offering, how appointments display on your calendar, whether or not customers can schedule their own appointments in the contact portal and much more. This article will give you an idea of the general scheduling settings you have to choose from.

This article will review:

- [Settings and Navigation](#)
- [Scheduling Configurations](#)
- [FAQs](#)

Settings and Navigation

The **Scheduling** page, found in the **Control Panel**, gives you options to control the calendar display, scheduling, communications, cancel reasons, online scheduling and other miscellaneous options. You can also configure organization-level holidays on this page.



[Scheduling](#)

Scheduling and holiday options.

These settings are default, master settings for your organization. You can specify more details and preferences on each individual **Service** as well.

Scheduling Configurations

Let's walk through each of the sections that you will find in **Control Panel > Scheduling**.

Calendar Options

- Configure color blocks on your calendar for services, service agents, and GeoZones to make it easier to get a quick overview of your schedule.
- **Recurring Appointments for Teams:** Set whether or not updates while in Team View will update future recurring appointments.
- **Optimize Drive and Start:** Enable drive and start time optimization when dragging and dropping in Team View.
 - This feature is similar to auto-snap. If you turn this off, it will affect every appointment. You can drag and drop appointments around and when you update, the system holds the order of appointments based on start time (not based on whatever changes you've made). The time will never update - even if

you click Update on the Calendar.

- **You will most likely want to leave Optimize Drive and Start setting turned on.**
- **Day Click Action:** Set the default view when clicking on a specific date on the calendar.

Scheduling Options

Default Tentative? ☐ Sets the Tentative option by default for new appointments. Tentative appointments won't send out confirmations

Default Ad Hoc? ☐ Sets the Ad Hoc option on by default. Ad Hoc lets you schedule appointments for any time you choose, ignoring availability

- What do you want the scheduling mode to default to?
 - If you use a call center service, for example, you can use scheduling options to make all your appointments **Tentative** by default. This will allow you to approve all appointments before sending any confirmations to contacts.
 - Perhaps your business is outdoors and appointments depend on weather conditions, so you prefer that everything defaults to **Ad Hoc** so you can manually set time slots and agents for appointments.
- **Granularity** defines the desired time between appointment appointments.
 - **Open Time Granularity:** Defines the space between appointments offered when using the Normal Scheduling Style. If you type 30 in this box, for example, you will be shown appointments every 30 minutes when scheduling. If left blank, you will only see the first available appointment of each day.

Scheduling Style ☒ Normal ☐ Ad-hoc ☐ Queued

Target Date ☐ Tentative ☐ Anytime ☐ First

Target Timeframe

Enter an optional time range (e.g. '2p-4p')

Select a Slot ☒ Agents ☐ Teams

☐ Fri, Jun 21, 2024 at 8:00a with Katniss Everdeen
720 mins from Aurora 80016

☐ Fri, Jun 21, 2024 at 8:00a with Harry Potter
720 mins from Aurora 80016

☐ Fri, Jun 21, 2024 at 8:00a with Aelin Galathynius
720 mins from Aurora 80016

☐ Fri, Jun 21, 2024 at 8:00a with Ron Weasley
720 mins from Aurora 80016

- **Appointment Window** determines how many days in the future appointment slots will display when scheduling.

Communications

- **Contact's Schedule Window:** this applies to how far in advance a customer can see their upcoming appointments in the contact portal. This would primarily apply to recurring appointments that are on the calendar months in advance. If you do not have the contact portal enabled, you can disregard this setting.
- **Approximate Times :** Check this box in order to communicate approximate appointment times (like "mid-morning") instead of exact times in client-facing messages. The windows are as follows:
 - Before 10am: Early Morning,
 - 10 am - 12pm: Morning
 - 12pm - 3pm: Early Afternoon
 - 3pm - 6pm: Afternoon
 - After 6pm: Early Evening.

Using **shortcodes** in email templates we can also take a scheduled time and calculate/display a range of time, like 8:30-10:30 for an appointment scheduled at 9:30. See our [shortcode help page](#) for more information.

- **Confirmation/Reminder Reply Email** : You can configure an alternate email for confirmation/reminder replies. For example, if you have an "administrative" email address which multiple associates can access, where you want customer responses to flow (i.e. Admin@BobsHandyman.com)

Proposals and Invoices

- **Show Schedule Dates**: These options control subscription and recurring appointment schedules displaying on proposals and invoices.
- **Expired Subscription Date Mode**:
 - Do Nothing
 - Pro-Rate
 - Call Us
- **Disclaimer Text**: Optional message to attach to scheduled dates section of the proposal/invoice.

Cancel Reasons

- Use this grid to manage your available cancel reasons
- If customers cancel an appointment, you can automatically set their customer category.
- You can also require users to pick one of these cancel reasons when cancelling an appointment - a great thing to track!

Required ☒ Require users to pick a reason when canceling an appointment

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Add...	Reason	Active?	Set Category
Edit Delete	Found Another Company	Yes	Example
Edit Delete	Too Expensive	Yes	Terminated
Edit Delete	Waiting	Yes	Prospect

Online Scheduling

- Use this to enable and control various aspects of the online scheduler.
- **Appt Start Proximity** : Sets the radius in feet for a warning to be displayed on the Appointment Start page in the app. If the device is outside this radius, a warning message is displayed.
- **Send Internal Note Alerts** : Sends an alert when appointments are completed and have Internal Notes.
- **Global Appointment Flash** : Displays this flash message on all appointments in the app. This is useful for cases where a regulatory warning or other message must be displayed for all users working appointments.

Operational Options

- Set alerts for internal users regarding how appointments are started/finished. You can alert your Service Agents if they are starting an appointment outside of the expected proximity or if the appointment duration is much shorter than expected.
- This area is also where the Photo Upload Limit (for Mobile App users) setting lives. **If this field is left blank, the default photo upload limit on the Mobile App is 5 photos.**

> Scheduling Logged in as Karen Libk

Redirects to this URL when contact requests to be contacted for scheduling options.

Require Payment Info ☐

Check this box if you want to require a credit card to make an appointment.

Operational Options

Appt Start Proximity

Display a warning unless within this many feet of the contact's pin location

Duration Alert %

If an appointment is being finished earlier than this percentage of the expected duration, the service agent will see a warning

Require Confirmation ☒ Require user to confirm when starting outside proximity

Require Internal Note ☐ Require user to add internal note when finishing

App Gallery Upload Limit

Send Internal Note Alerts ☒ Send alerts for appointments finished with internal notes

Global Appointment Flash

Displays on all appointment details pages for service agents

Miscellaneous Options

Miscellaneous Options

These options control various global settings.

- **Auto-close** : With this option enabled, all appointments prior to today will be marked as closed. You can use this if you are not normally starting/finishing or Quick Finishing appointments.

Auto-close ☒ Automatically close incomplete appointments each day

Show Part Summaries ☐ Show part summaries with appointments on contact details pages

- **Show Part Summaries** : This controls whether part summaries are displayed on the appointment list on the contact details page.
- **Expired/Expiring Service Windows** : These control how many days in advance contacts that are approaching or have passed their Next Service Date are displayed on the Expiring Service Grid. This is most commonly used for services that have a specific service interval configured, such as a maintenance or warranty window.
- **Backlog/Future Window** : This controls how far into the future appointments are displayed on the Backlog appointment grid.
- **Default Capacity Units** : This is the default units that will be displayed for all demand capacity displays.
- **Default Rate per Hour** : Configuring this will set new proposal durations based on the value of the proposal. For example, if you set this to 100, then a proposal valued at \$400 will have a duration set to 4 hours. This only applies to services/parts that do not have a duration already configured. The duration is always rounded up to the next hour.

Holidays

- Use this grid to create organization-level holidays. These override all availability. To mark your location closed for all scheduling, just add a new Holiday. See our Block Calendar Time article for more information.

Holidays

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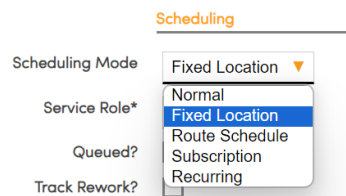


Add...	Name	Dates
Edit Delete	Thanksgiving	Thu, Nov 28, 2024
Edit Delete	Fourth of July	Thu, Jul 4, 2024
Edit Delete	New Year's Day	Mon, Jan 1, 2024

FAQs

Is it a setting where I can say no address is requested to schedule an appointment?

For services like that, that don't require a service address for the contact, you can update it to be "Fixed Location" and that should allow for slots to show in Normal scheduling mode in **Control Panel > Services**. A fixed location will set the appointment address as the organization's warehouse address instead of the contact's. It's good for in-office consultations or virtual meetings/phone calls.



Should I be using auto-close for appointments?

It helps keep the backlog cleared but if the appointments aren't actually being worked then they may want to turn it off.

Auto-close doesn't trigger the usual finish action to generate an invoice or anything, it just updates the status. The appts might need to be reverted back to scheduled status, depending on the situation or what needs to be done.

Otherwise, they can be invoiced manually.