Scheduling Options Based on Service

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Overview

Services are the core of service**minder** scheduling system. They define how things are scheduled, workflow options as well as recurring or subscription appointment options.

This article will review:

- Settings and Navigation
- Service Scheduling Options
- Scheduling Appointments from a Next Service

Settings and Navigation

You can configure scheduling-related settings for each service you provide by navigating to **Control Panel > Services.**



Services

Configure the services you offer, including which are available for your customers to schedule themselves.

In this article, we will also discuss how **Skills** and **Service Roles** can impact scheduling. Those can also be configured in the **Control Panel**.



Service Roles

Configure your service roles, such as Service and Sales.



<u>Skills</u>

Manage your list of skills that can be used to refine matching Service Agents to appointments.

1.

Service Scheduling Options

Scheduling Modes dictate how an appointment is placed on the calendar:

Normal: When a service is set to Normal scheduling mode, available slots are presented with set times and

2. service agents. They are sorted by date and drive time so available slots which are closer to existing appointments are shown first. This is the best mode to use when your normal way of scheduling is to hand out set dates and times to clients when they call in.

Fixed Location: The Fixed Location mode is essentially the same as Normal with the exception that drive
 time is eliminated. This mode is handy for cases where the customer is coming to your retail location. The slots presented can be adjacent to other appointments with no drive gap between since the service agent

performing the work doesn't have to go anywhere.

- 4. <u>Subscription</u>: The Subscription mode is for scheduling services that run on a cycle, such as every week or every two weeks, etc. Subscription services are tied to Route Schedules. A route schedule along with the client's GeoZones are used to determine what days are available for the service.
- 5. <u>Route Schedule</u>: The Route Schedule mode works similarly to the Subscription mode with the exception of
 being used to only schedule a single appointment (or a recurring appointment). A single date will be presented based on the available Route Schedules for the service and the intersection of the client's and Route Schedule's GeoZones. The appointment will get queued on that date.

<u>Recurring</u>: The Recurring service schedule mode should be selected for a service that recurs on a regular basis, whether it's weekly, quarterly, or annually. When you have designated a service as recurring, you can check out this Help section to learn more about creating Recurring Appointments.

	For more information about configurations for recurring appointments, see our help page titled
i	Recurring Appointments.

Scheduling Mode	Normal	▼	
Service Role*	Service V]	
Skills	Flooring	Instal	I Roofing

Service Roles are assigned to Service Agents on their schedules. The two most common Service Roles are Service and Sales. This feature helps assure that you do not accidentally schedule a salesperson for an installation appointment or a technician for a sales appointment. These are configured in Control Panel > Service Roles.

Skills are used to describe what knowledge or abilities a Service Agent needs in order to run an appointment with this service type. These are configured in Control Panel > Skills. Note: If you assign skills to a service and no Service Agents have this skill marked on their profile, then no appointments will display in Normal scheduling mode.

Queued?			
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		
Route Optimize	Auto-snap on Teams		
Limit to States			

Other Settings

- **Queued** Places the appointment on the date, but does not assign it a time. The appointment will have to be assigned a time manually.
- Track Rework This allows you to create Rework appointments and connect them to the original service appointment if you ever need to go in and correct a problem, enabling you to track the costs associated with

the rework.

- **Direct Schedule** Enable this checkbox if you want to be able to schedule this appointment directly from the contact without generating a proposal first.
- Internal Accept This will allow you to accept or decline proposals on behalf of customers if you do not require customer signatures on proposals. The buttons will appear at the top of the proposal details page next to the schedule button.
- Seasonal Is this a service that you only provide during the summer, for example?
- **Route Optimize** Allows you to optimize the appointments on a particular agent so they are in the optimal order to minimize overall drive time. You can complete this action from the Calendar.
- Limit to States List which states in which this service is offered (for national brands).

Open Time Granularity	240
	Optional appointment slot size, in minutes. Leave blank for "first available only
Timeslot Sorting	Default
Lead Time Hours	
	Minimum lead time for offering slots, in availability hours.
Lead Time Days	
	Minimum lead time for offering slots, in availability days.
Drivetime Warning Window	
	Warn about drivetimes larger than this window.
Alternate Date Window	
	Provide the next n days as alternate dates for appointments

- **Open Time Granularity** This controls the frequency with which you want to offer appointments for this service when using Normal scheduling mode. If you type 60 in this box, you will see appointments every hour. If left blank, you will only see the first available time slot for each day.
- **Timeslot Sorting** Choose whether you want to see appointment time slots displayed in order by date or driving distance.
- Lead Time Hours/Days Set a minimum number of hours or days you need in advance before scheduling an appointment. This prevents last-minute scheduling of services that need preparation time.
- Drive Time Warning Window Don't want to drive over an hour to an appointment? Set a 60 minute window here so the system warns you before scheduling an appointment too far away.
- Alternate Date Window Provide alternate date options within this window of time.

Scheduling Appointments From a Next Service

A contact will have a next service date assigned to them if they ever complete a recurring service. That next service date can be edited from the contact's edit page, as well as what service needs to be completed on that date. If you have any contacts with next service dates that are within the past 30 days, they will show up in the Expired Service area, which is located on the left-hand side under 'Snapshot'. Any services due in the next 30 days will show up in the same place, but under Expiring Service. To schedule an appointment for a contact's next service:

- Select a contact with a next service date.
- Click on the 'Schedule' button as if you were scheduling an appointment normally.
- When selecting a service, choose the contact's next service. This will auto-populate the date field.

• Once the appointment is scheduled, you have successfully scheduled a contact's next service date.