Rework an Appointment

07/12/2024 1:08 pm CDT

Overview

It happens. Something doesn't go as expected with a job, and your agents need to go back and make a correction. As a business owner, this can be costly. Tracking rework appointments allows you to keep up with these expenses, better-train agents, understand products, and adjust your strategies.

This article will discuss:

- Settings and Navigation
- Create a Rework Appointment
- Reporting

Settings and Navigation

A rework appointment will be tied to the original proposal, and to the associated appointment.

To enable the ability to track reworks, first go to **Control Panel > Services**. Edit the applicable service and scroll down to the **Scheduling** section. You'll see a **Track Rework** checkbox:

	Scheduling				
Scheduling Mode	Normal				
Service Role*	Service V				
Skills	Flooring Install Roofing				
Queued?					
Track Rework?					
Direct Schedule?	Allow scheduling appointments directly				
Internal Accept?	Allow users to internally accept proposals				

Create a Rework Appointment

Once the original appointment is finished, if that Service has tracking reworks enabled, you will find the Rework icon at the bottom of the appointment screen. For this example, let's say an installation went awry. Your installer put a hole in something and it needs to be repaired.



Click the hammer icon to create a rework appointment. Here you can add add notes and other important information.

Schedule an Appointment							
Contact	Brooke Trout 186 Fleet Street Austin, TX 78748 Pri (666) 666-6666 ☐ Customer						
Rework From	Installation Appointment 6/25/2024						
Customer Notes		/ Import					
Internal Notes		l.					
Flash Message							

From there you can choose your service and schedule the appointment.

Reporting

Once the appointment is finished, the data will feed to the Rework Report, found in the Reworks tab in the blue toolbar at the top of your page. You can view this report by date range and can download the data to a spreadsheet.

Reworks by Service

14.3%	Reworks 1 Total 7	ANNUAL M. O% Reworks 1 Total 5	AINTENANCE Reworks 0 Total 1	RESIDENTIAL CLEAN	ING Reworks 0 Total 1		
Service Agent	Service	Appointments	Duration	Quantity	Reworks	Rework Duration	%
Avis Agent	Annual Maintenance	1	2 hours	1	0		0.0 %
Avis Agent		1			0		0.0 %
barney agent	Installation	1	8 hours	1	0		0.0 %