Top 10 Questions: Scheduling

02/07/2025 12:47 pm CST

1. Is there a way to cancel the start of an appointment if you accidentally hit start?

In the app there's an "Unstart" option, if you go to the appointment.

You can also go to the appt in the web view, click Edit, and scroll down to the bottom and delete the Actual Start start day and time.

	Tutorial Agent h:mmt duration		
Auto Create Follow-	Auto-create follow-up appointment?		
op:	If checked, invoice for this appointment will be marked Unapproved		
Frequency/Interval	30		
	Days to next appointment		
Actual Start	7/8/2024 2:00pm -		
	Notifications		
	Delivery		
Email	I johndoe@fakeemail.com		

2. Is there a way to change the scheduled duration of an appointment after the appointment is complete?

Once an appointment is complete, you can only edit the Actual Start/Finish to adjust actual duration.

3. How do we set up the Users so they can only see their own appointments?

By default, Service Agents should have the permissions to ONLY see appointments assigned to them. If you have Users that can see other appointments, then you can do the following:

Go to **Control Panel > Users > Edit > Permissions Tab.** Deny the *Calendar* permission and Grant the *My Schedule: Appointments.*

Calendar	Grant ODeny
My Schedule:Appointments	Grant ODeny

4. When we Finish an appointment, it creates another invoice. Is there a way to finish the appointment without it creating a second invoice?

This is controlled by the Finish Action and Invoicing Mode of this service type. Go to **Control Panel > Services > Edit** and scroll down to the Invoicing section. Here there are two dropdown menus:

- Finish Action: What happens when you finish an appointment.
- Invoicing Mode: When proposals are invoiced.

	Invoicing		
Finish Action	Default Action		
Invoicing Mode	Via Appointments	▼	
	Determines how proposals are invoiced		

"Default" Finish Action will automatically generate an invoice if the appointment is for more than zero dollars or has any line items. You may want to change this to "Close Appointment", which will not generate an invoice.

You may want to change the Invoice Mode to something other than "Via Appointments". Possibly "Manual" is the best option if you actually invoice before an appointment is ever scheduled. Learn more about Service Settings: Invoicing Mode.

Alternatively, you can to remove the pricing from the appointment so that it won't invoice again. So if there is a cost showing on the appointment, click on the blue pen icon under the Part or Service description and remove any Base or Unit pricing that is contributing to the total amount shown.

5. Is there anyway in the system to have a part that is added to an open invoice, automatically be on every appointment?

We do not have a way to automate an part to retroactively be added to all recurring appointments. When finishing an appointment, you can add the part then and it will be on the invoice that generates.

6. I finished an appointment for a technician this evening and for some reason it did not automatically create an invoice like it usually does.

Physically clicking **Finish** on the appointment will generate an invoice. Editing the appointment and manually adding the start/finish times does not generate the invoice. If that happens and you need to generate an invoice, click Invoice on the appointment now to generate that.



7. What is the difference between Agent and Teams mode?

Agent means that you typically only have an agent working an appointment. You can schedule multiple agents to an appointment using Agent Mode but normally you have solo agents in the field.

Teams Mode is for businesses that have multiple people working each appointment or have a wider variety of who works together. You can still have a person work an appointment, but typically you have a car with multiple agents

working all the appointments during that day.

For either type of scheduling, you can have an agent show up for only part of the time. You would just include that in the duration field when scheduling.

8. What is the difference about scheduling off the contact or off of the proposal? Does it matter?

If a proposal exists, we always recommend scheduling from a proposal instead of scheduling directly from the contact. This keeps all of the information connected in the system and allows you to track the progress of the proposal.

9. Can I bulk change appointments if I need to postpone for some reason?

Yes, you can!

- 1. Go to Appointments in the main navigation.
- 2. Filter by Scheduled Start. Choose a range of dates or there are options to select things like "This Week" or "Tomorrow".
- 3. Then you can click on the Actions button and choose Bump.
- 4. Then select the number of days you wish to delay these appointments.
- 5. Don't forget to hit the **Bump** button when you are done.

Bump Appointments						
Are you sure you want to bump these appointments? You can choo Days* A	ose a number to days you like to move these a	to move these appointments in ppointments? Use a positive number	to the future below. er to move into the future or a negative	number to move them backwards.	ę	5
			1		в	lump Nevermind
Appointments 2				Filter* All Upcoming Onl	ly In Progress Last Ba	acklog 🛃 Actions 🔻
X Owner V X Categories V X Tags V X Scheduled Start V X Services V X Parts V X Service Agents V Add Reset			3			
Page 1 of 1 (1 items) 🧃 🚺 🕨 🕨						Page size: 25 *
Add Scheduled Start 💡	Status 💡 Te	entative 9 First Available	Duration 💡 Service Name	ନ Total ନ	Name 💡 A	ddress 9 Ci
Edit 🔹 Cancel 🔲 Friday, June 14 at 10:45a	Scheduled No	o No	30 mins Ghost Spraying	\$100.00	Bobby Boater 51	16 6th St Sc
♀ <u>Create Filter</u>	1					

You can also do a similar method to bulk cancel appointment. In the Actions menu, you would select Cancel.

You can also Bump or Requeue from the Calendar Day View by using the Actions menu in the top right corner.

			Nonth Week Day Actions
A ⊕ Mystery Machine* ▼	2 ⊕ ☐ Team 1 ▼	P ⊕ ☐ Test Team ▼	Re-Queue
 Mystery Machine Shaggy, Scooby, Velma 		Image: Test User Image: Bonnie McMurray	Bump Copy Teams From Snap
Cnt 2 Qty 2 Dur 1 hour 20 mins Man 4 hours Dep 7:45a Ret 9:50a Rev \$500 1 - 08:00a Installation Stacey Fakename 5678 Main Street Austin, TX 78703 My Territory, North Austin Drive 15 mins Qty 1 Dur 40 mins 2 - 08:55a Installation John Dee 1234 Easy Street Austin, TX 78746 My Territory, South Austin	Cnt 0 Qty 0 Dur 0 mins	Cnt 1 Qty 1 Dur 17 mins Man 30 mins Dep 7:50a Ret 8:27a 1 - <u>08:00a Weekly Maintenance</u> Ken Tucky 117 Pine Street Austin, TX 78744 South Austin Drive 10 mins Qty 1 Dur 17 mins	

10. What does Backlog appointments mean?

Backlogged appointments mean they have been queued or scheduled, but haven't been started yet.

By default, you will also see future appointments in the Backlog. If you only want to view appointments that were scheduled in the past but not started yet, you can set your Backlog/Future Window to 0 in Control Panel > Scheduling.

Backlog/Future Window	0	days
	Limit Backlog and f	uture agent appointments to this many days into the future.

11. What does each color mean on the calendar for appointment times?

The times for appointments in Month and Week views or the side bar in Day views indicates the status of the appointment. If the time is:

- Black -- scheduled in the future
- Red -- start date/time is now in the past (so overdue)
- Orange -- started but not completed
- Green -- completed

As you refresh the calendar during the day you can tell which ones are currently in progress, which are complete and which ones are running behind.

12. A location is no longer seeing line items/pricing on appointments. I made some changes trying to fix but no luck.

If you switched it to manual mode, that can cause this issue. Also just be aware that adjusting the proposal Invoicing Mode won't affect appointments already scheduled.

To fix, cancel the appt and try scheduling it again. It should pull over the lines, as long as the invoicing mode is no longer manual. Or, if they leave it in manual mode, there should be a little Import button on the line items. Click that and then they'll have the ability to import proposal lines over.

13. Proposal wasn't attached to an appointment and when I cancelled it to reschedule hoping to fix, I can't even get the appointment back on the calendar.

There was an appt already attached to the proposal, so that's why the Scheduled button is no longer there. All they need to do is click Attach appointment and then select the install that needs to be attached to that proposal.

14. What does the lock symbol mean and how do I get rid of it?

The lock symbol means that the appointment was booked using ad hoc mode with auto snap turned off. If you were to drag and drop it on a different day, it would stay the same time. For instance, it is locked into a specific timeframe.

Appointments made with auto-snap may realign times for more optimized schedules/routes. Ad hoc appointments are created without SM taking any of the normal parameters into consideration.

If you want to adjust it, edit the appointment and turn on Auto-Snap. After saving the appointment, you should see that icon go away.