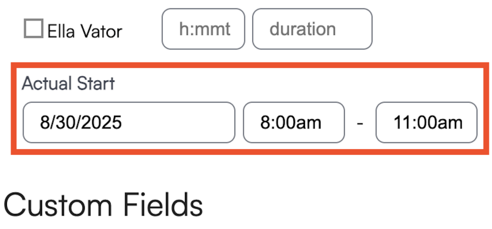
Top 10 Questions: Scheduling

09/29/2025 10:15 am CDT

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.



You can also adjust the duration of the appointment this way by editing the Actual Start/Finish times.

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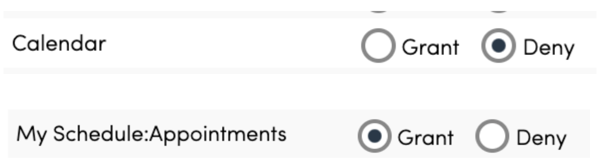
2. How do we set up the Users so they can only see their own appointments?

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.*



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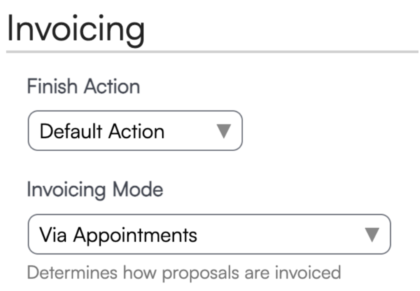
3. When we Finish an appointment, it creates another invoice. Is there a way to finish the appointment without it creating a second invoice?

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.



"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.

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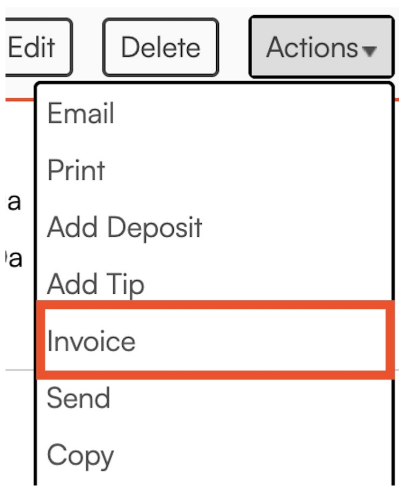
4. I finished an appointment for a technician this evening and for some reason it did not automatically create an invoice like it usually does. How can I create the invoice after the fact?

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 **Actions>Invoice** on the appointment now to generate that.



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

Agent Mode 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.

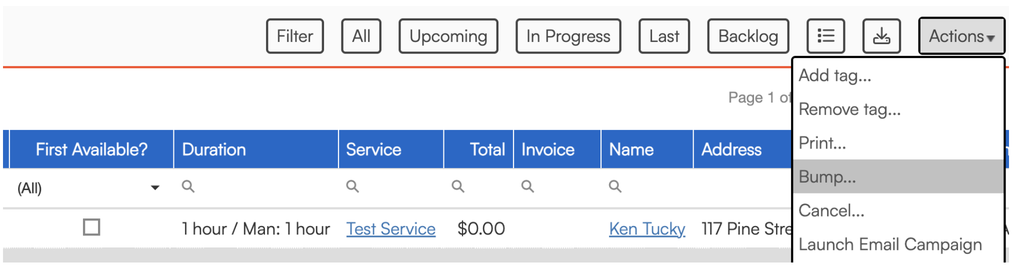
6. What is the difference between scheduling from the contact or from of a proposal? Does it matter which one I do?

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.

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

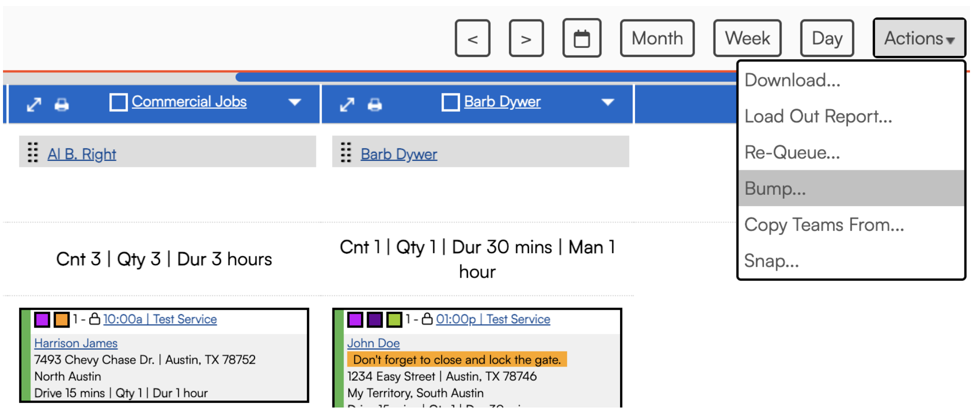
Yes, you can!

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.



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.



8. What are "backlogged" appointments?

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 > Miscellaneous Options**.

9. 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:

- **Blue** -- 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.

10. 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.