Service Settings: Repeating Chaining Options

07/22/2024 11:10 am CDT

Overview

This article explores the Repeating/Chaining Options section of the Services settings (Control Panel > Services > Edit or Add).

 This article will review: Recommended Interval Queue Date Repeat Service Auto-Schedule Follow Up 	
Recommended Interval	Repeating/Chaining Options 0 Value in days
Queue Date?	
Repeat Service	Select one
Auto-schedule Follow Up?	Select a followup service to perform after this service is complete Check to automatically create the chained appointment

Recommended Interval

This is the number of days between appointments of this service. This is commonly used for services that are periodic in nature, such as annual maintenance. It is used to set up service reminders and tracking for the client to remind them to schedule the periodic service.

Recommended Interval will place a **Next Service Date** on a contact's profile. For example, if the Recommended Interval is set to 7 days and the first appointment is scheduled for June 3rd, the contact will have a Next Service Date on their profile of June 10th. If the next service is not scheduled for June 10th, that contact will show up on the Expiring Services grid leading up to that date and will move to the Expired Services grid after that date. This is most useful for repeating services that you do not want to automatically schedule using the Recurring Services settings, but you want a reminder to get the appointment placed on the calendar.

Expiring/Expired services show up in Snapshots when a customer has a service that had a "recommended interval" set up on it.

For example, a service has a recommended interval of four months. If a contact has a service with a recurring interval set up, and nears that four month mark without completing that next appointment, they'll show up in

Expiring. If they pass four months without an appointment completed for that service, they'll be in Expired.

Snapshots		Conta	cts					
Pulse								
At a Glance		25 👻						
Open Invoices	6	ld	Name	 Phone 	Email	Service Address	City	Sto
Unapproved Invoices	2	Q	Q	Q	۹	Q	Q	Q
Projects	1	7358456	Brooke Trout	(666) 666-6666	brooketrout@fakeemail.com	186 Fleet Street	Austin	ТΧ
Accepted Proposals	3	T Create	e Filte					
Open Proposals	1	Views De	fault 🔻	view name	Save			
Backlog \$625	5/5							
Expired Service	1		-					
Expiring Service	1							
Checklists	0							
Tasks	16							

You can check the Service Interval timeline by clicking on the blue "Timeline" link next to the Next Service Date.

Customer Since	6/4/2024 (Test Service)
Last Service	6/25/2024 4:41:53 PM
Next Test Service	7/2/202 Timeline

Default Confirmation Email to brooketrout@fakeemail.com

This will show any time that a recommended interval or other automated setting triggered that date to be entered onto the contact's profile. If the date was manually entered on the contact profile, it will not display on this timeline.



Don't want to see a contact on the Expiring or Expired service grid? Go to their contact profile, click edit, and **delete** the **Next Service Date** (or **Next Project**) field or check the **Declined** box.

	Basic Info		
Name	Brooke Trout		
Company			
Pri Phone*	(000) 000-0000	Select one V	
Alt Phone		Select one V	
Email	brooketrout@fakeen	nail.com	Email Declined?
Next Service Date	7/2/2024	Test Service	veclined?
Category*	Customer 🔻		

Queue Date

Queue Date is most useful for seasonal services. For example, you may have a drip trigger that sets an appointment with this service type to be scheduled for a customer every October to perform winterizing services. If a Queue date is entered into this space, *all* winterizing service appointments will be queued on that date in order to be spaced out manually on the calendar for that season.

Repeat Service

Repeat Service allows specifying an alternate service for the recommended service interval. A common example would be when doing an install, you can specify the Annual Maintenance service as the repeat service after 365 days. This is a great option for any service that *always* comes after another. Common examples are "set-up/take-down", estimate/service, or demolition/installation service combinations.

Auto-Schedule Follow Up

You can choose to automatically schedule a follow up service which will open up a new set of options. You will select which service you want to automatically create on the calendar as well as how many days later it should be created.

Auto-schedule Follow Up?	
	Check to automatically create the chained appointment
Follow Up Service	Select one
	Select the service to automatically create
After How Long?	
	Value in days
Create Follow Up On	Finish Relative To Appointment Actual Start
	Select when to create the chained service appointment.
Align Day of Week?	No Checked V day of week
	Schedule on the closest or next same day of week.
Attach to Same Proposal?	
	Attach the new appointment to the same proposal
Carry Forward Add Ons?	☐ Mode Keep pricing on first appointment ▼
	For auto-created follow ups, check this to carry forward any add on lines

- Create Follow Up On: This option affects when the follow up appointment is created, based on when an appointment is scheduled or finished with this service:
 - Schedule: When this appointment is scheduled, go ahead and schedule the follow up appointment
 - Finish: When this appointment is finished, then schedule the follow up appointment
 - Queue on Schedule: Create the follow up appointment in the Queue when this appointment is scheduled
 - Queue on Finish: Create the follow up appointment in the Queue when this appointment is finished
- **Relative To Appointment:** This controls what date the scheduled follow up appointment is created relative to:
 - Actual Start: The follow up appointment will be created relative to the actual start date of this appointment
 - Actual Finish: The follow up appointment will be created relative to the actual finish date of this appointment
 - Scheduled Start: The follow up appointment will be created relative to the scheduled start of this appointment
- Align Day of Week: This option forces the newly created follow up appointment to "snap" to a particular day of the week. The first dropdown contains either Yes or No. If Yes is selected, then the available options are:
 - Scheduled: The day of week from the Scheduled Start is used
 - Actual: The day of week from the Actual Start is used
 - Target: The day of week from the Target Date is used
- Carry Forward Options: This option determines what happens to any add-on lines when auto-creating follow-ups.
 - Keep pricing on first appointment: This option will leave the pricing on the first appointment. The lines will be copied to the follow up appointment, but will all have a zero price.
 - Move pricing to next appointment: This option will duplicate the add ons to the follow up appointment including pricing, and then zero out the pricing on the first appointment.
 - Move lines to next appointment: This option will move the add ons and associated pricing to the follow up appointment. The first appointment will not have any add ons.
 - Copy pricing to next appointment: This option copies the add ons and the pricing to the follow up appointment. The pricing and add ons will stay on the first appointment also.