Part Settings: Part Distribution

04/17/2025 11:00 am CDT

Overview

Part Distribution refers to the functionality within service**minder** to automatically or manually attach parts (aka items) that are necessary for an appointment.

You can utilize Part Distribution for either Recurring or Subscription services. Learn more about:

- 1. Recurring
- 2. Subscription Style Services

You can set up part distribution in two different ways:

- 1. You can manually use Part Distribution on a Proposal. This would be one-off or specialty circumstances.
- 2. Or you can automate the distribution of parts. This is best if you have many parts with varying degrees of frequency needed. Typically, this is most used for industries such as pest control, pool maintenance, or lawn care.

Keep reading to learn how to set up Part Distribution.

Part Distribution on a Proposal

The first method of setting up Part Distribution is on a proposal created for a subscription-based service. This functionality allows you to select which line items (aka Parts) are attached to which appointments.

Click Schedule on the proposal in the top menu. Then select the calendar icon next to the correct item.

	Option	Item	Description	Quantity	Rate
	Select a template	Barrier Spray - 2 Weeks	☐ Lawn and foliage barrier spray service,	1	0
₿ 🛛	-option-	Ant Treatment	Ant Killer Stuff EPA#123	1	50
	-option-	Pond Dunks	Pond dunks for killing mosquitos in ponds and other bodies of water.	s 1	50
			00		
≣ ⊗	-option-	Gnats	Gnats be gone!	1	495
			Ø 🗄		
	-option-	-part-	Search Import		

You can select or deselect at the proposal level or set it at the part level. Keep reading to learn more about how to automate this process.

Automating Part Distribution



Automating Part Distribution means that you do not have to schedule specific parts off the proposal. The system will do it for you moving forward. It will not affect previously scheduled appointments or created proposals - only new ones moving forward.

While you can manually set the parts on specific dates every time, you can also configure the distribution of the parts to be done automatically. This is set at the part -level.

Go to Control Panel > Parts > Edit.

Click on the Part Distribution section.

This field lets you define the rules for which dates to add the parts. The rules are a comma separated list of steps. Each step may specify how many sequential visits to add the part to, or how many visits or days to skip till the next visit.

	Part Distribution
Pricing	wated v2 a v
Summarization	v,s45u,v2,s,v
	Steps for automating part distribution for subscription/recurring services
Part Distribution	Distribution Start
Package Consumption	
	The start date for part distribution formulas
	Distribution End
	The end date for part distribution formulas

Part Distribution Formulas

Don't worry! It may look like calculus right now but you can easily learn how to read and create the correct part distribution formula for your business.

Here are the types of formulas followed by examples:

- v[n] Add the part to the current visit. The optional n value can be used to specify the next n visits.
- **s**[**n**[**d**|**v**]] Skip a visit or days. The default is to skip a single visit. If you include a number, the number indicates how many visits to skip. If the number is negative, that means to skip to the end and then go in the reverse direction. You can also append either a d or a v after the number. The d indicates you want to skip calendar days. The v can be used so you're more specific about how many visits you're skipping.
- **dyyy-mm-dd** Skip to the first scheduled date after the specified date. This allows advancing to a specific calendar date.
- **R** Repeat the distribution steps. Reset back to the beginning. This is ignored if no parts have been distributed yet from the preceding steps.

Example	What it Does
v,r	Add to all visits
v,s45d,v2,s,v	Add to first visit, then skip 45 days, add to the next 2 visits, skip a vist, then add to the next visit
s35d,v5	Skip the first 35 days, then do the next 5 visits

Example	What it Does
s1v,v,s120d,v	Skip the first visit, then add to the next visit. Skip 120 days, then do the next visit If the rules extend beyond the available visits (by skipping days or visits) then those part distributions will be skipped.
v1,d2019-08-01,v3	Add to the first visit, then find the next date after September 1 and then add to the next 3 visits.
v,s-1,v	Add to the first visit, then skip to the last date and add to the last visit.
v,s30d,r	Add to the first visit, then skip to the next visit after 30 days, then repeat until there are no more dates.

Below are what these formulas look like when put into the Part Distribution field.

Part Distribution

Part Distribution	
s35d,v10	
Steps for automating par	t distribution for subscription/recurring services.
Distribution Start	
4/1/2025	
The start date for part dis	stribution formulas
Distribution End	
8/31/2025	
The end date for part dist	tribution formulas
Part Distribution	
Part Distribution	
Part Distribution v,d2025-08-01,v4 Steps for automating par	
Part Distribution v,d2025-08-01,v4 Steps for automating par Distribution Start	
Part Distribution v,d2025-08-01,v4 Steps for automating par Distribution Start 2/24/2025	rt distribution for subscription/recurring services
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Part Distribution v,d2025-08-01,v4 Steps for automating par Distribution Start 2/24/2025 The start date for part dis Distribution End	rt distribution for subscription/recurring services
Part Distribution v,d2025-08-01,v4 Steps for automating par Distribution Start 2/24/2025 The start date for part dis Distribution End	rt distribution for subscription/recurring services

Part Distribution Start and End

Here is a second example:

The Start and End fields for distributing parts can be used on their own without formulas. You may want to use the Start and End dates for a part that's only needed for certain times of the year.

For instance, a chemical weed killer for undesirable plants that only grow in the summer season would be set up as the following.

Part Distribution

Part Distribution
Steps for automating part distribution for subscription/recurring services.
Distribution Start
06/01/2025
The start date for part distribution formulas
Distribution End
08/31/2025
The end date for part distribution formulas

FAQs

Do I need to reset these distribution start and end dates each year?

Yes, if you tell the system that a part is only available for a select period of time, it will ignore any appointments and hide that part outside those time frames.

Can I add calculations to the part distribution formula that isn't shown in the examples above?

You should stick to the formula elements provided. If you try to write a brand new one, the system most likely won't recognize it and produce no results for distributing parts.

Troubleshooting

How do I know if the part is distributing correctly after I set it up?

When scheduling off the proposal (for a subscription or recurring service) find the section that will show a date range and the correct season (*see below*). It will tell you when the parts will appear on the appointment schedule. If you see none there, you will no something is incorrect.

Confirm the remove exist	subscription ing dates by	appointme clicking the	nt dates. Y e X.	′ou may add	new dates by	clicking or	
Route Sch	edule						
2025 Se	ason 🔻						
Range							
3/17/20	3/17/2025 to 10/24/2025						
Date	Details			Dur	Subtotal	Tax Notes	
× <u>2025-04-16</u>	Pond Dunks,Gna	ats		40 mins	\$0.00	\$0.00	
× <u>2025-04-30</u>					\$0.00	\$0.00	
× <u>2025-05-14</u>					\$0.00	\$0.00	
× <u>2025-05-28</u>	Ant Treatment			0 mins	\$0.00	\$0.00	
× <u>2025-06-11</u>	Ant Treatment,G	nats		10 mins	\$0.00	\$0.00	
× <u>2025-06-25</u>	Ant Treatment,Gnats			10 mins	\$0.00	\$0.00	
× <u>2025-07-09</u>	Ant Treatment			0 mins	\$0.00	\$0.00	
× <u>2025-07-23</u>	Ant Treatment,Gnats			10 mins	\$0.00	\$0.00	
× <u>2025-08-06</u>	Ant Treatment,Pond Dunks			30 mins	\$0.00	\$0.00	
× <u>2025-08-20</u>	Ant Treatment,Pond Dunks			30 mins	\$0.00	\$0.00	
× <u>2025-09-03</u>	Pond Dunks			30 mins	\$0.00	\$0.00	
× <u>2025-09-17</u>					\$0.00	\$0.00	
Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday	
Mar 17 0/5	18	19 🗖 🗖 🔿	0/2 20	0/30 21	22	1/0 23	

Why isn't the part distributing correctly?

The most common reason is a syntax issue. Carefully review the formula. Did you skip a comma or did you leave out a "d"at the end of a number when skipping days?