SPP 418: Using the Scheduler for Starts

SPP 400: Pest Prevention & Lawn Service Procedures · https://milo.masseyservices.com/docs/spp-418-using-the-scheduler-for-stats/

Section: Service Procedures
Subject: Using the Scheduler for Starts
Approved by: Tony Massey
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Policy Owner: Director of Administrative Training

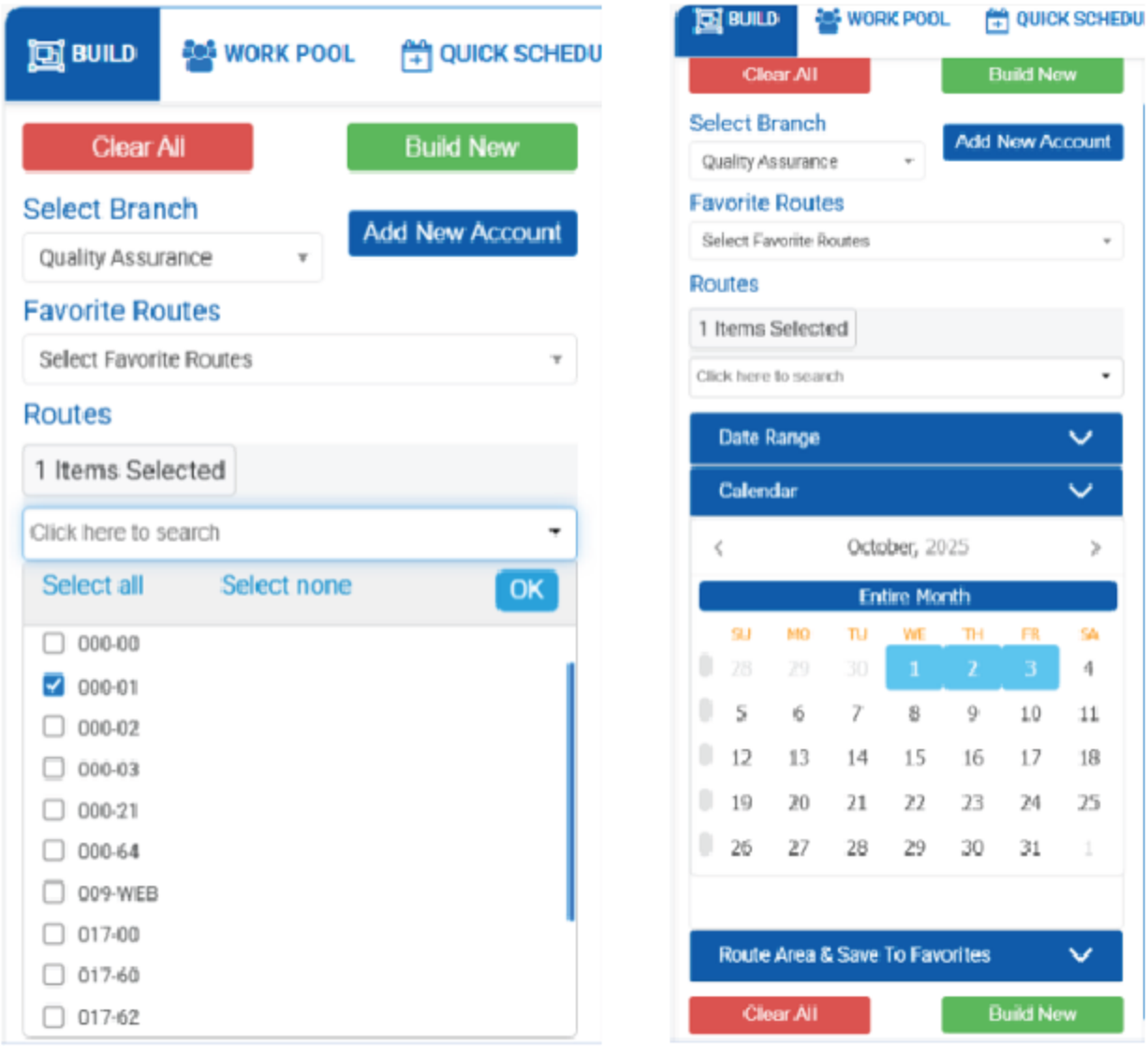
Policy

Purpose

This procedure outlines the process for scheduling starts using the ServicePro Scheduler. This tool allows for visibility from any service center or Customer Care, ensuring a consistent and accurate scheduling process.

Part 1: Building the Calendar

- First, get the customer's address from the Sales Inspector. This will determine the route.
- In Scheduler, select Build.
- Choose the correct Branch (Service Center).
- Select “Click here to search” to view the Route menu, select the route, and click OK.
- Next, choose either the Date Range or Calendar option. For example, under Date Range, you may select options such as "Today & Next 2 Days" or "This Week," while the Calendar allows you to select a specific date or date range.
- Click Build New.



Figures 1 & 2: Building the Calendar

Part 2: Scheduling and Creating a Block Time

1. Work with the Sales Inspector to find the best day and time for the appointment.
2. To open the Block Time window, you have two options:
   A. Option A: Click directly on an open time slot on the calendar. A pop-up window will appear. (Figure 3)
   B. Option B: Click Block Time at the top of the screen. The Block Time fields will appear on the left side, like the Build screen. (Figure 4)

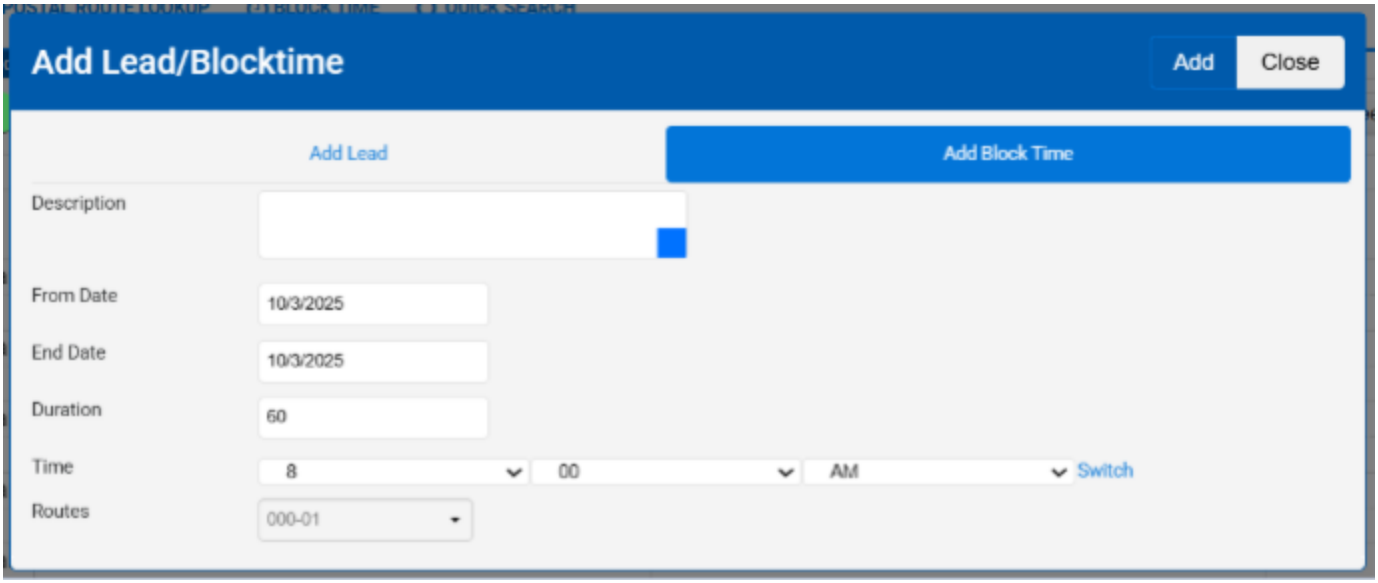


Figure 3. Creating a Block Time directly from the calendar.

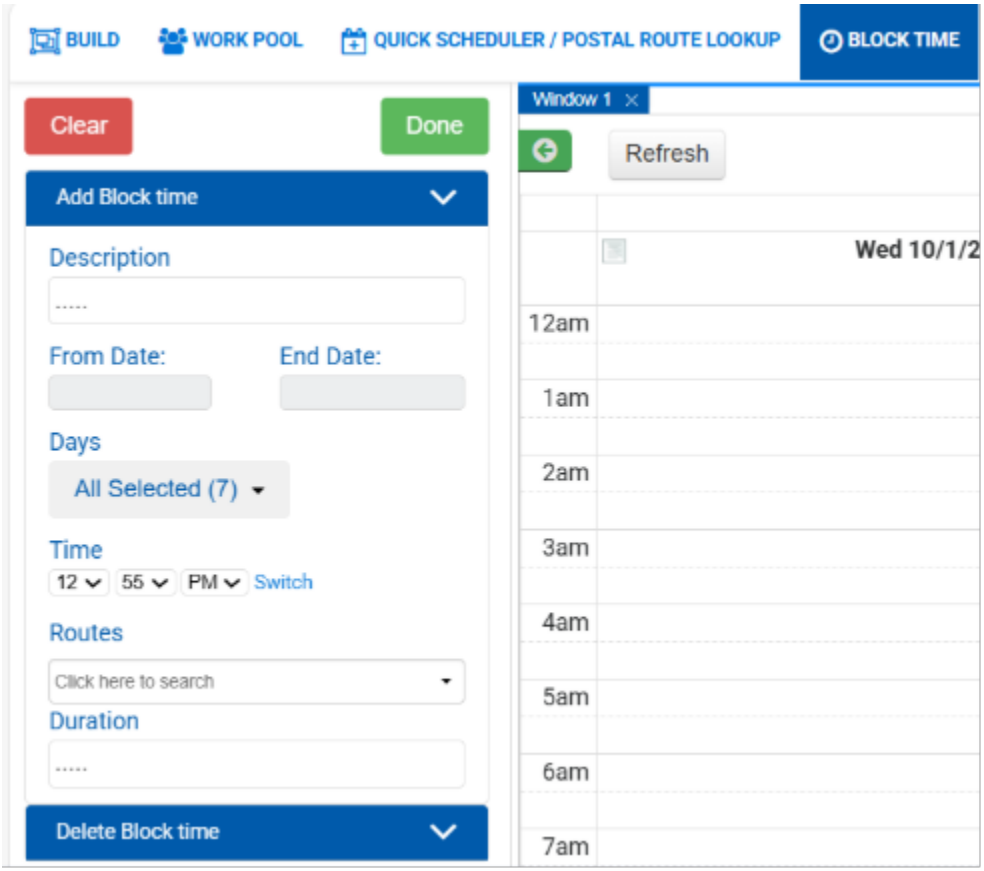


Figure 4. Creating a Block Time from the link at the top of the screen.

3. Complete the required information in the fields:
   A. Description: Include the service type, street address, zip code, customer's last name, phone number, and the initials of the team member who sold the service.

B. From Date and End Date: These will auto-fill if you use the calendar.

C. Duration: The default time set by the Scheduler is 60 minutes, but you will adjust it as needed. Refer to our Service Standards for specific guidance.

D. Time: Enter the service time agreed upon with the customer.

E. Route: This will auto-fill if you use the calendar.

4. Finally, click Add (or Done if you used the header link).

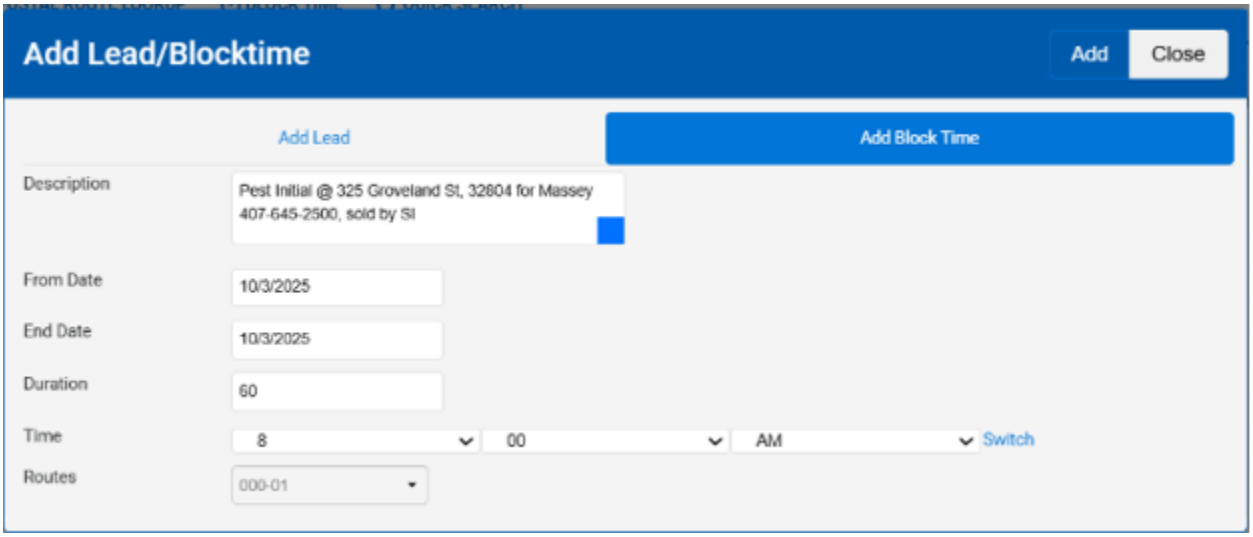


Figure 5. Completing the required information in the fields.

Part 3: Confirmation

1. A green notification will appear, confirming the block time was created successfully.
2. View the new appointment on the calendar. If you don't see it immediately, click Refresh.

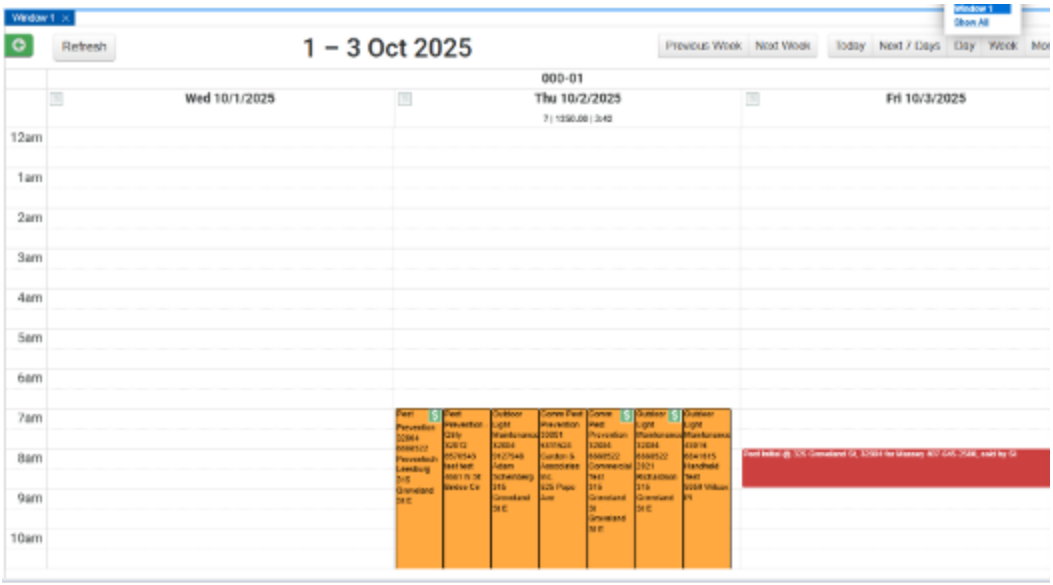


Figure. 6 The Block Time is shown on the Calendar.

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