

SECTION: PEST PREVENTION & LAWN  
SERVICE PROCEDURESSUBJECT: Using the Scheduler for  
Starts**SPP No.:** 418**Section:** Pest Prevention & Lawn Service Procedures**Subject:** Using the Scheduler for Starts**Approved By:** Tony Massey**Effective Date:** October 14, 2025**Last Reviewed Date:** October 14, 2025**Policy Owner:** Director of Administrative Training**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**

1. First, get the customer's address from the Sales Inspector. This will determine the route.
2. In Scheduler, select Build.
3. Choose the correct Branch (Service Center).
4. Select "Click here to search" to view the Route menu, select the route, and click OK.
5. 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.
6. Click Build New.

Figures 1 and 2.  
Building the Calendar

The image contains two screenshots of the ServicePro Scheduler interface. The left screenshot (Figure 1) shows the 'BUILD' screen. At the top, there are tabs for 'BUILD', 'WORK POOL', and 'QUICK SCHEDULE'. Below these are buttons for 'Clear All' and 'Build New'. A 'Select Branch' dropdown menu is set to 'Quality Assurance', with an 'Add New Account' button next to it. Under 'Favorite Routes', there is a 'Select Favorite Routes' dropdown. The 'Routes' section shows '1 Items Selected' and a search box with 'Click here to search'. Below the search box are 'Select all', 'Select none', and 'OK' buttons. A list of routes is shown with checkboxes: 000-00, 000-01 (checked), 000-02, 000-03, 000-21, 000-64, 009-WEB, 017-00, 017-60, and 017-62. The right screenshot (Figure 2) shows the 'BUILD' screen with the 'Calendar' option selected. It features 'Clear All' and 'Build New' buttons at the top. Below are 'Select Branch' (Quality Assurance) and 'Add New Account' buttons. There are 'Favorite Routes' and 'Routes' sections. A 'Date Range' dropdown is set to 'Calendar'. A calendar for October 2025 is displayed, with the 1st, 2nd, and 3rd highlighted. At the bottom, there is a 'Route Area & Save To Favorites' dropdown and 'Clear All' and 'Build New' buttons.

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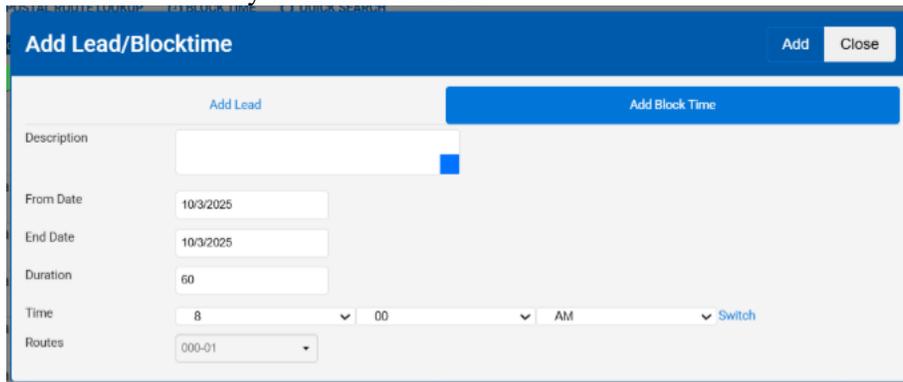
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Starts

## 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. Creating a Block Time directly from the calendar.

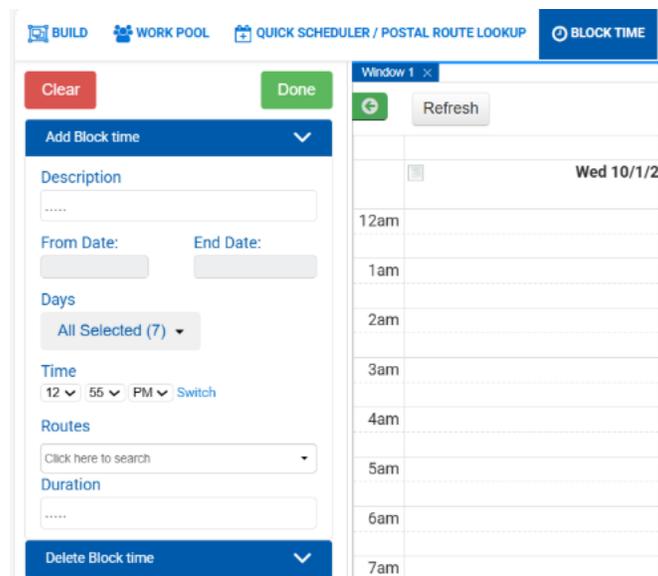


The screenshot shows a software window titled "Add Lead/Blocktime" with "Add" and "Close" buttons in the top right. The window has two tabs: "Add Lead" and "Add Block Time", with the latter being selected and highlighted in blue. The "Add Block Time" tab contains the following fields:

- Description: A text input field.
- From Date: A date input field showing "10/3/2025".
- End Date: A date input field showing "10/3/2025".
- Duration: A text input field showing "60".
- Time: A time selection interface with a dropdown for "8", a dropdown for "00", and a dropdown for "AM", followed by a "Switch" link.
- Routes: A dropdown menu showing "000-01".

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



The screenshot shows the main scheduler interface with tabs for "BUILD", "WORK POOL", "QUICK SCHEDULER / POSTAL ROUTE LOOKUP", and "BLOCK TIME". The "BLOCK TIME" tab is selected. The interface includes a "Clear" button (red) and a "Done" button (green) at the top. Below these is a "Refresh" button (green) and a "Window 1" title bar. The main area is split into a left sidebar and a right calendar view. The left sidebar, titled "Add Block time", contains:

- Description: A text input field.
- From Date: and End Date: Two date input fields.
- Days: A dropdown menu showing "All Selected (7)".
- Time: A time selection interface with a dropdown for "12", a dropdown for "55", and a dropdown for "PM", followed by a "Switch" link.
- Routes: A dropdown menu with a search prompt "Click here to search".
- Duration: A text input field.
- At the bottom of the sidebar is a "Delete Block time" button (blue).

The right calendar view shows a grid for "Wed 10/1/2" with time slots from 12am to 7am.

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SECTION: PEST PREVENTION & LAWN SERVICE PROCEDURES

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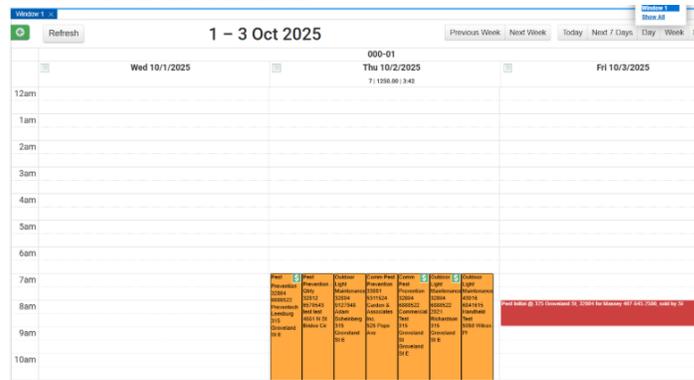
3. Complete the required information in the fields:
  - a) Description: Include the service type, street address, zip code, customer's last name, phone number, and the initials of the team member who sold the service.
  - b) From Date and End Date: These will auto-fill if you use the calendar.
  - c) 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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