

Schedule Assistant

Reducing drive time is a growth opportunity for any service business. Whether scheduling your maintenance or membership jobs or optimizing your routes in general, Schedule Assistant can help reduce drive time, save time in the office, and help you get more jobs done in less time.

The screenshot displays the Schedule Assistant interface with the following filters and settings:

- Date Range:** 3/22/2020 to 3/26/2020
- Earliest Start Time (optional):** Earliest Start to Latest Start
- Weekdays:** All Weekdays
- Job Type:** Water Heater
- Business Unit:** Plumbing
- Only Show Technicians:**
 - ☒ With the skills for this job
 - ☒ With unbooked availability
 - ☒ In this zone

Below the filters, the interface shows a list of technicians sorted by driving efficiency:

- Most Efficient:** +3 min (28.8 mi)
 - Mon, March 22th 9:00AM-11:00AM**
 - Jessica Smith** (6 Stops, 7 hrs of work)
 - 801 N Brand St**
 - 8AM-9AM** HVAC Annual Maintenance Queens Zone
 - 9AM-11AM** (Selected)
 - 11AM-1PM** HVAC Annual Maintenance Queens Zone
 - 1PM-3PM** HVAC Annual Maintenance Manhattan Zone
 - 3PM-4PM** HVAC Annual Maintenance Brooklyn Zone
- #2:** +3 min (28.8 mi)
 - Tue, March 23th 2:00PM-3:00PM**
 - Tom Waters** (6 Stops, 7 hrs of work)
 - 321 N Orange Street**
 - 8AM-9AM** HVAC Annual Maintenance Staten Island
 - 10AM-12PM** HVAC Annual Maintenance Staten Island
 - 1PM-2PM** HVAC Annual Maintenance Staten Island
 - 2PM-3PM** (Selected)
 - 3PM-4PM** HVAC Annual Maintenance Staten Island
- #3:** +3 min (28.8 mi)
 - Wed, March 24th 9:00AM-11:00AM**
 - Sara Johnson** (6 Stops, 7 hrs of work)
 - 801 N Brand St**
 - 8AM-9AM** HVAC Annual Maintenance Queens Zone
 - 9AM-11AM** (Selected)
 - 11AM-1PM** HVAC Annual Maintenance Queens Zone
 - 1PM-3PM** HVAC Annual Maintenance Queens Zone
 - 3PM-4PM** HVAC Annual Maintenance Queens Zone



Reduce Drive Time

Maximize technician schedules to spend less time driving and more time building customer relationships and generating revenue.



Save Time Scheduling

Take the guesswork out of scheduling with recommendations for the best day, time, and technician for the job, so any CSR or Dispatcher can maximize productivity in the field.



Get More Jobs Done

Get more jobs done in less time by optimizing technician schedules based on their skills, availability, and drive time.

Skills & Shifts

To maximize the power of Schedule Assistant, you must be using the **Skills & Shifts** features in ServiceTitan.

- ▶ **Skills** lets you customize a list of skills relevant to your business and assign them to job types and technicians so that the right people are assigned to the right job.
- ▶ **Shifts** let you determine the days/hours a technician is available to work, is on call, and their time off.

Skills

To start creating skills, go to the **Settings** page and search for Skills. From the Skills page, click **Add skill**. After your skills are created you'll attach them to Job Types and Technicians. Not sure what Skills are most relevant? Check out the list below for the top Skills used in ServiceTitan.

Most used Skills in ServiceTitan:

- Service
- Install
- Maintenance
- Managed Technician
- Sales
- Estimate
- Warranty
- Repair
- Inspection

Add Skills by Job Type

Settings > Job Types

If your Job Types are already created, click **Edit** and then add the appropriate Skills.

Add Skills by Technician

Settings > Technicians

Select the technician, click **Edit**, and then add the appropriate Skills.

Shifts

To start creating shifts, click **Schedule** in the top navigation bar, then click **Technician Shifts**, then **Create Shift**.

Enter a name for your shift and select the **Start Date** (this can be today). In the example to the right, we're creating a shift for Monday - Friday to start immediately and repeat every week. You'll select the Technicians or Business Units this applies to. Once all your details are in, click **Add** to schedule.