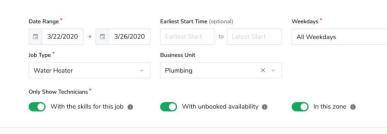
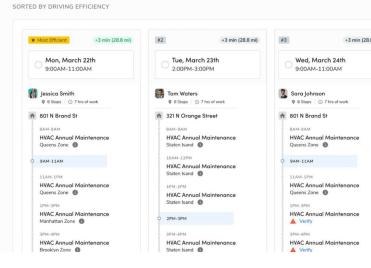
ServiceTitan°

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.





Particle Prive Reduce Drive Time

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

(L) 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.

ServiceTitan[®]

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

•

- Managed Technician
- Maintenance

Install

Sales Estimate

•

- Warranty
- Repair
- Inspection

Add Skills by Job Type

Name 🛛 🕒 Installation Business Unit Priority 0 📰 Urgent

Sold Threshold 0 0.01 Class 0 📃 Job class Tags 🚯 📃

Duration 1 2.00 hours ~

Skills 0 Install

Settings > Job Types

Edit Job Type - Installation Details Default Services

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

| Add Skills by Techniciar | ו |
|----------------------------------|---|
| Settings > Technicians | |
| Soloct the technician click Edit | n |

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

| | Install | |
|-------------------------|------------------|-----|
| Skills 🚯 | Install | |
| Job History Date filter | Last Three Days | • |
| Manager | Select a manager | • |
| | B Save Cancel | Dea |

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.

| Create S | | SHIFT | | TIME O | FF × | | | | | | |
|---|---|----------|----|----------|---------|------|--------|-------------------|--|--|--|
| ON CALL OVERNIGHT SHIFT | | | | | | | | | | | |
| Monday - Friday | | | | | | | | | | | |
| START DATE | | | E١ | ND DATE | | | | | | | |
| 2/8/2022 | | * | | 2/8/2022 | | * | | | | | |
| Start Time | 9:00 AM | © | 1 | End Time | 5:00 PM | 6 | Shift | : length: 8 hours | | | |
| REPEATS REPEATS EVERY | | | | | | | | | | | |
| Weekly * | 1 Week | | 2 | /8/2022 | * | 12/3 | 31/202 | 27 * | | | |
| MON | TUE | WED | | тни | FRI | s | AT | SUN | | | |
| Select Bus | Select Business Units to Filter Technician List | | | | | | | | | | |
| Andre Young \times Bryan Williams \times Joe Smith \times Clear \bullet | | | | | | | | | | | |
| | | | | | | | | | | | |
| Cancel | Add to | schedule | • | | | | | | | | |