WEB SCHEDULER SETUP CHEAT SHEET

Please review the training links below for Web Scheduler

Resources	Link
Feature Demo	[Homeowner and Office Experience Overview](#)
Setup Overview	[Overview of Widget Creation](#)

Complete	Web Scheduler Pre-Setup Checklist
☐	**Create a Campaign For Web Scheduler -** Navigate to Settings > Operations > Campaigns and [add a new campaign](#) that you can assign to your web scheduler. **Resources:** [Adding marketing campaign in ServiceTitan](#)
☐	**Create a Campaign Tracking Number for Campaign -** Navigate to Settings > Phones > Phone Numbers and create a unique tracking number. Assign that number to the campaign you created for the Web Scheduler. ****IF USING PHONES PRO**** Add your tracking number to DialPad. **Resources**: [Assign tracking numbers to campaigns](#) [Add tracking number to Dialpad](#)
☐	**Map Your Job Types -** [Assign your custom job types to standardized job types](#) to be displayed on the web scheduler to your homeowners. (**If your trade is not available in job type mapping**, please know we are working on expanding the offerings available. In the meantime, please email web-tools-beta@servicetitan.com so we can include you in our development.) Resources: [Job type mapping](#)
☐	**Adjust Business Hours -** Web Scheduler will use the time slots you've set as your business hours to display windows of available time to your customers when booking a job. If you need to adjust your business hours to display to your liking, you can do so at Settings > Operations > Business Hours. If you're currently using Adjustable Capacity Planning, the web scheduler will use that instead. **Resources:** [How to set up business hours](#)

Section Setup Definitions

Contact Details Section	
Widget Name (Not Visible to Customer)	Widget name is how you can tell your widgets apart on the main page of the web scheduler (Settings > Integrations > Marketing Integrations > Web Scheduler) so you should choose something identifiable to you.
Business Name (Visible to Customer)	Business name is visible during the booking process for your customers in addition to on the call booking screen in ServiceTitan. This name should be recognizable to your homeowners (IE: Titan Home Services)
Phone Number (Not Visible to Customer)	Phone number should be the ServiceTitan tracking number that you have assigned to the marketing campaign created for your Web Scheduler. While this phone number is not customer facing right now, it will be in the future so a unique tracking number and campaign will allow you to see where customers found you.
Email (Not Visible to Customer)	Email is optional and should be an email that gets checked regularly. Most customers will use an email that their homeowners use for general inquiries such as "info@titanhomeservices.com". This field is currently not visible on the Web Scheduler during the booking process but will be in the future.
Website Link	****IMPORTANT** Website URL should always start with the prefix https://** Website link is what establishes the connection between ServiceTitan's web scheduler and your website. If you're unsure what the official URL for your website is, please contact your web administrator. Once your widget is saved, this field will lock and become uneditable. If you entered the wrong website URL in this field and it is locked, you will need to create a new web scheduler from scratch with the correct URL and generate a new code for installation.
Marketing Campaign	The marketing campaign assigned here auto-populates in the "Campaign" field on the call booking screen when a web booking is being booked into a job so we can attribute revenue from jobs booked from the web scheduler to the web scheduler.

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General Settings	
Job Types	Job types that you have mapped in Job Type Mapping that you would like to display to your customers in the "Issue" drop down menu.
Business Units	Business units mapped to your job types in Job Type Mapping available for this web scheduler.
Exclude Zones (Set Up and Use Zones)	Zones added here are zones you would like to exclude from the web scheduler. When a homeowner in one of the excluded zones attempts to book a job, they will receive a stop in the workflow with a message telling them that you are not currently serving that area and to contact the office if they have questions.
Automatically create a job on the Dispatch board	This feature allows jobs booked from the web scheduler to be booked automatically without the need for a CSR to accept and book the job on the call booking screen. These jobs will show up in the "Unassigned" section in the job tray of the dispatch board as ServiceTitan will not assign a technician for jobs booked from the web scheduler. **Recommended:** ● For more accurate booking availability for your homeowners, we recommend setting up Adjustable Capacity Planning. ● Most compatible with job type mapping where your standard job types are mapped to a single custom job type in ServiceTitan as opposed to multiple job types.

Message Customization	
Confirmation Message	This message shows when the homeowner has sent their booking request. An effective message regardless of using the automatic creation feature or not is: *"Thank you! You will receive confirmation when your job is booked!"*

Design	
Buttons Color	Changes the color of the "Next" button.
Primary Color	Changes the color of highlighted items such as appointment selection dates.
Header/Footer	Changes the color of the header/footer of the web scheduler window. We do not recommend using dark colors as the text may become illegible.
Background Color	Changes the color of the main background of the web scheduler window. We do not recommend using dark colors as the text may become illegible.