🔧 Core Rules & Guardrails

Rule	Protocol
Same-Day Appts	Supervisor, SM, BM, or the SP required; notify SP via Teams
Next-Day After 1PM	Treat as same-day; needs RC, Field Support, or Field Leader approval
Weekend Appts (Sat/Sun)	Not allowed without RC or Field Leader approval
>2 Weeks Out from Original	Requires Supervisor/Sen Specialist approval; max 30 days for Loyalty
Balance Over $70	🚫 No scheduling allowed
Appointment Reminder	✅ Always send via route after confirming with customer

⏱️ Route Duration

Condition	Max Hours	Exceptions
Regular Days	6.0 hrs	Supervisor may approve up to 7 hrs if mileage ≤ 60
Mondays (Meeting Days)	5.0 hrs	No exceptions unless in Branch Notes

📅 Check "Hrs" on top-right of SP route
→ First number = total active job time
→ Never exceed thresholds without documented permission

⏰ Timed Appointment Rules

Constraint	Enforcement
Max timed appts per route	Typically 1–3; always check route header
Must follow 2-hour windows	e.g. 8–10, 9–11, ..., 3–5
No overlap allowed	Must be staggered
After 4PM (e.g., 3–5, 4–6)	Requires BM, SM, or Route Creation approval
Multiple appts = same time window	CX preference applies to all appts on route
Mondays	No timed appts before 10AM; only 2 timed per route

🛠️ Service Pro Skills
Schedule ONLY if route shows the skill for:
- VIP Services
- Cockroach Treatments
- Flea Tick Interior Reduction
- Termite Baiting
- Bed Bug

✅ Hover over "S" icon to verify

🛑 Jobs outside this list = free to assign to any SP

📎 Technician & Branch Notes

Follow local variations based on:

- "DO NOT ADD" — requires RC, BAM/DAM, SP, or Manager approval
- "RESCHEDULE ROUTE" — do not book on these routes; check with BAM
- "X Jobs Only" — check CX address to confirm zone
- Max timed or total job caps — listed per branch/SP behavior
- Latest appointment time — don't exceed route-specific limits

📅 Lead Service Pros (LSPs)

Metric	Rule
Who Can Schedule	Inside Sales, Loyalty, Sups, Ticket Responders only
Job Types Allowed	Initials, Reservices, VIP, Save attempts
Max Distance	30 miles
Route Duration Limit	5.5 hours
Time Windows	4-hour blocks
Job Limit	6 total

📍 LSP routes found in **Lead Pro tab**

🛑 CS team should **only schedule** with ticket or supervisor directive

🔐 Locked Routes

Routes may restrict access if:

- Locked by Manager
- Assigned to restricted Office Staff

✅ Unlock only with approval from: RC, BAM/DAM, Field Manager, SP themselves

✅ Supervisor or Sen Specialist can perform unlock **if**:

- CX has appointment already — adding on route
- SP calls in to Pro Support on current date
- Future changes approved by branch, RC, or field
  → Re-lock the route post-scheduling

📉 Empty Routes

Do not book unless:

- ≥2 appointments on the route
- All ≤9 miles apart

✅ If 1 or fewer appointments: submit ticket for approval