Last Updated: October 2026

# AdCap Setup Checklist

*A scannable setup guide for setting up Adaptive Capacity. For AdCap specific support, please reach out to adcap@servicetitan.com*

## Setup Checklist

| Done | AdCap Setup Item |
|---|---|
| | **Before You Start — Settings Check** |
| ☐ | **Shifts:** Set up technician shifts for all technicians included in AdCap. Shifts tell AdCap when a technician is available to work, so without shifts, capacity will always be zero or negative if jobs or NJE's are assigned to shiftless technicians. |
| ☐ | **Arrival windows:** Do you need to adjust your arrival windows? Either shorter or longer arrival windows will work, but best practice is to have a morning and an afternoon arrival window, especially if working with Dispatch Pro. **All business units that will be using AdCap need to be mapped to arrival windows.** |
| ☐ | **Multi-BU techs:** Do any techs work across multiple Business Units? ServiceTitan limits each technician to one BU. You can either combine multiple BU's into a BU Group or skip the BU filter and use skills/zones instead (usually cleaner). |
| ☐ | **Technician and Job Type Skills:** Do all technicians work all job types? Highly recommended to use job and tech skills. Required if some techs can't perform all job types within a BU or BU group. Our new Skills Management settings make this process easy. |
| ☐ | **Job Types:** Make sure job durations and job skills are accurate. We use a default value of 2 hours for any job types missing job durations. Job types without skills can be assigned to any tech and can deduct capacity from all technicians, so we **strongly recommend** adding skills to every job type even if that job type isn't normally scheduled through AdCap. If using the BU filter, you should also map job types to the relevant BUs.<br>***Note:*** *Using the new skills management feature linked above will ensure job type skill changes are retroactive.* |
| ☐ | **Job Type Groups:** Job type groups make it easy to group together jobs with similar capacity needs. These groups can be used to more efficiently set up reporting filters or even strategic rules. Ask your CSM or support to enable the feature if it's not on already. |
| ☐ | **Zones:** Do technicians work in every zone? If not, use zone mapping to determine individual service areas. If using the VA, map your zones to Business Units to ensure that the VA only books within your service area. |

Last Updated: October 2026

| | |
|---|---|
| ☐ | **Drive time:** Does drive time matter when you think about capacity? If so, ask your CSM or support to enable drive time with Adaptive Capacity so you can see capacity results sorted by route efficiency and select the technician with the shortest additional drive time. This setting also allows you to set a maximum drive time so that you are able to book jobs into arrival windows with more efficient routes. |
| ☐ | **Voice Agent:** Voice Agent job booking depends entirely on AdCap availability. Define after hours settings for VA in VA settings and set up technician shifts or on call shifts accordingly. VA settings can define what kinds of jobs can be booked after hours and AdCap strategic rules can be used to make after hours booking more granular. |
| ☐ | **Atlas Rule Builder:** Are there capacity patterns you want to control with strategic rules, like seasonal limits, after-hours restrictions, or holiday blocks? The Atlas agent is built into the Strategic Rules builder. Describe the rule in plain language and Atlas fills in the conditions and capacity threshold for you to review. Default capacity is 100%, so you only need rules for exceptions.<br>***Note:*** *Atlas can make mistakes, so always review the rule before saving. Specific prompts work best, e.g. "Reduce HVAC capacity by 20% in July Monday - Friday."* |
| | **Configuration** |
| ☐ | **Schedule > Technician Shifts:** Once your account is configured for shifts, set up Technician Shifts and maintain them. Without shifts, capacity will always show zero or negative since jobs and assigned Non Job Events (NJE's) deduct capacity regardless of whether a technician has a shift.<br>***Note:*** *AdCap can also be configured to recognize on-call shifts.* |
| ☐ | **Settings > Arrival Windows:** If your account uses arrival windows, ensure every Business Unit that produces capacity has one. Different Business Units can have different Arrival Windows if needed.<br>***Note:*** *Arrival windows can't be configured per day-of-week, only per BU.* |
| ☐ | **Settings > Technicians:** Assign all technicians who should produce capacity to a Business Unit. If skills are configured, ensure they're assigned correctly. Techs are only eligible for a job type if they satisfy ALL required skills (not just one). Techs without skills can only perform job types without skills, and job types without skills can be performed by any tech. Technicians that get booked outside of Adaptive Capacity can be excluded from capacity under Technician exclusion settings.<br>***Note:*** *BU mapping is only required for AdCap if you want to calculate capacity by BU. It's a ServiceTitan best practice but can be ignored otherwise.* |

Last Updated: October 2026

| | |
|---|---|
| ☐ | **Settings > Employees > Permissions:**<br>***Access Get Adaptive Availability Filters****: Allows the employee to access and use filters in the Get Adaptive Availability pop-up in Call Booking.*<br>***Access Adaptive Capacity Settings****: Allows the employee to access and view Adaptive Capacity Settings, but not make edits to the settings.*<br>***Edit Adaptive Capacity Settings****: Allows the employee to access, view, and edit Adaptive Capacity Settings in ServiceTitan Settings.*<br>***Access Adaptive Capacity Rules****: Allows the employee to access and view Adaptive Capacity Rules, including rule builder, but not make edits to rules.*<br>***Edit Adaptive Capacity Rules****: Allows the employee access, view, create, and edit Adaptive Capacity Rules in ServiceTitan Settings.*<br>***Apply Manual Adjustments****: Allows the employee to apply manual adjustments in Adaptive Capacity Reporting, Advanced Mode.* |
| | **Basic Settings** |
| ☐ | **Basic Settings > 'Default to include Non-Managed Technicians' Capacity in Availability Calculation':** Recommended OFF, so non-managed techs aren't included. |
| ☐ | **Basic Settings > 'Default to include On Call Technician Shifts in Availability Calculation':** Determines whether on-call shifts count toward capacity. Turn ON if Voice Agent or CSRs need to book into after-hours on call shifts. |
| ☐ | **Basic Settings > 'Default to include Zones in Availability Calculation':** Use zones when techs should be limited to specific service areas. If using zones, make sure they're created and assigned to techs. |
| ☐ | **Basic Settings > 'Default to include Business Units in Availability Calculation':** Recommended ON only when techs are meant to work jobs for a single BU. In most cases, leave OFF and use job type / tech skills for more control. |
| ☐ | **Basic Settings > 'Default to honor Business Unit Groups over Business Units':** Legacy setting that helps accounts with techs who work across multiple BUs. In most cases, leave OFF and use job type skills instead since skills offer you the most granularity. |
| ☐ | **Basic Settings > 'Default to treat non-job events as time-off shifts':** When OFF, each NJE counts as a separate technician commitment, so overlapping NJEs are double counted and NJEs that partially overlap a scheduled shift count as overbooking. When ON, NJEs are treated as time-off shifts: overlapping NJEs are combined into a single time-off block, NJEs outside a scheduled shift are ignored, and NJEs that partially overlap a shift cut the shift early. We recommend this setting be turned ON.<br>***Note:*** *Example: A tech has an 8am–4pm shift with two NJEs overlapping from 2pm–4pm. With the toggle OFF, that's counted as an overbooking since the tech has two commitments in that time. With the toggle ON, the NJEs cut the tech's shift off early.* |

Last Updated: October 2026

| | |
|---|---|
| ☐ | **Basic Settings > 'Default to count out-of-window appointments toward overall capacity':** When OFF, capacity is calculated per arrival window. Appointments or NJEs outside a given arrival window or shift are ignored for that window's calculation, so a tech double-booked in an earlier arrival window or outside a shift won't affect capacity in a different window. When ON, all appointments and NJEs count toward the tech's overall capacity, regardless of arrival window or shift boundaries. We recommend you turn this setting OFF if you stage jobs before or after technician shifts.<br>***Note:*** *Example: A tech has an 8am–4pm shift with a job appointment at 6am. With the toggle OFF, that 6am job doesn't affect capacity for the later arrival windows. With the toggle ON, all jobs count against the tech's overall capacity to prevent overbooking for the entire day.* |
| ☐ | **Basic Settings > Technician Exclusions:** Use to fully exclude techs from AdCap like placeholder techs, field managers assigned manually, or any tech who shouldn't contribute to capacity like installers. Otherwise, any assigned job or non job event will deduct from overall capacity. Jobs/non job events assigned to excluded techs are ignored in overall capacity calculations. |
| ☐ | **Basic Settings > Get Adaptive Availability Preference > 'Display drive time and assign technicians during booking':** Shows available techs, stop counts, and drive time for each time slot in Get Adaptive Availability, and lets CSRs assign a tech during booking. The Most Efficient tab sorts each slot by the shortest route. Drive time is calculated from validated addresses, so make sure customer location records and technician home addresses have verified coordinates.<br>***Note:*** *This setting also allows you to set a max drive time to limit capacity for jobs that are too far out of the way. If Dispatch Pro is enabled, we take the Dispatch Pro provided max drive time.* |
| | **Advanced Settings** |
| ☐ | **Advanced Settings > Availability Threshold:** Default buffer between jobs and at the start of arrival windows for estimated drive time. Generally leads to underbooking; the recommended value is 0 in most cases since we have better ways of incorporating drive time.<br>***Note:*** *Example: a 2-hour job with a 30-min threshold requires 2.5 hours of space to book.* |
| ☐ | **Advanced Settings > Minimum Booking Lead Time:** Buffer that prevents bookings into arrival windows that are about to close. If an arrival window ends within the configured lead time from now, it won't be offered to CSRs so your team isn't dispatched into windows with insufficient time remaining. Keep in mind this will apply to all arrival windows including the last one of the day when attempting to book jobs into the current window.<br>***Note:*** *Example: With a 60 minute lead time, you won't be able to book a job until 61 minutes from now to prevent last minute bookings into the current arrival window.* |
| ☐ | **Advanced Settings > Tag Selections:** Designate which tags are relevant for AdCap. Mapped tags can be used as report filters or to build strategic rules. To trigger rules, tags must appear on the call booking screen tags field, meaning they need to exist on the job, job type, location, or equipment level. |

Last Updated: October 2026

| | |
|---|---|
| ☐ | **Adaptive Capacity Settings > Strategic Rules:** Set up rules for special cases — strategic overbooking, after-hours emergency-only bookings, seasonal maintenance limitations, specific zone service days etc. Start simple and only add complexity when needed. When rules overlap, we use the strictest rule calculation.<br>***Note:*** *Atlas (Rule Builder Assistant) can interpret plain-language rule descriptions and suggest configurations — useful when building your first few rules. In Strategic Rules, click Atlas, describe the rule you want, and keep the conversation going to refine it. Atlas fills in the conditions and threshold and flags any issues or inconsistencies it finds. Always review the suggested rule before saving.* |
| | **Verify Your Setup** |
| ☐ | **Run a quick check before going live:**<br>• Test a booking in Get Adaptive Availability for a representative job type. Does it return availability where you'd expect it?<br>• Click 'Availability Details' on any slot under "All Available" to confirm which techs are eligible, which rules are applied, and what's consuming capacity. |
| | **Tips and Best Practices** |
| ☐ | **Don't stack jobs or Non Job Events on the same tech.** Stacked jobs and events are all counted, so capacity fills up even when the board looks open. Two stacked 2-hour jobs at the same time consume 4 hours, not 2. |
| ☐ | **Non Job Events consume capacity.** Specifically: an NJE consumes capacity if timesheets are configured (old NJE UI) OR if 'include in capacity' is checked (new NJE UI). Audit NJEs before troubleshooting 'phantom' capacity loss. |
| ☐ | **Create shifts for all techs.** Don't assign jobs/NJEs to techs without shifts. Capacity is still consumed when a tech has no shift unless they're explicitly excluded from AdCap. |
| ☐ | **Assign jobs as soon as possible.** Unassigned jobs make Capacity Reporting harder to read and can prematurely close arrival windows when there are more jobs scheduled than available technicians for that scheduled time. |
| ☐ | **Voice Agent:** Voice Agent books whatever capacity AdCap shows once the job type is passed through. After Hours can be defined within Voice Agent rules, but you can use Adaptive Capacity strategic rules to prevent certain job types from being offered during those predefined after hours. Atlas can draft this kind of rule from a prompt like "After 5:00 PM, my technicians should only work on No Cool and No Heat jobs." |

## Training Resources

Additional Resources to review post setup.

Last Updated: October 2026

| Resource | Link |
| --- | --- |
| **Quick Start – Basic Settings** | Adaptive Capacity Quick Start – Basic Settings |
| **Quick Start – Advanced Settings** | Adaptive Capacity Quick Start – Advanced Settings |
| **Quick Start Overview** | Adaptive Capacity Overview |
| **Weekly Webinar Training** | Weekly setup walkthrough webinar |
| **Setup Overview Deck** | Adaptive Capacity Best Practices + Sneak Previews |
| **Basic Troubleshooting** | Troubleshooting Basics |