ADCAP SETUP CHECKLIST

Please review the training links below for Adaptive Capacity

Resources	Link
Overview Training	[Adaptive Capacity Overview](#)
Manager Training	[Adaptive Capacity for Managers](#)
CSR Training	[Adaptive Capacity for CSRs](#)
BCN Recording	[Blue Collar Nerd - Book More Efficiently with Adaptive Capacity](#)
Setup Overview Deck	[Adaptive Capacity Best Practices + Sneak Previews](#)

Complete	AdCap Checklist
❑	**Schedule > Technician Shifts**: If configured for shifts, set up [Technician Shifts](#) and make sure to maintain them. Without created shifts, your capacity reporting will always show as negative since jobs and assigned non-job events always deduct capacity, regardless of whether a technician has a shift. Also note that AdCap can be [configured to recognize On Call shifts.](#) Note: *Shifts are only required for AdCap if configured for the account. Shifts are strongly recommended in order to control when [capacity is produced.](#)*
❑	**Settings > Technicians:** Assign all technicians to a Business Unit who need to show capacity. If you have skills configured in your account, ensure that skills are properly assigned to technicians. Technicians will not be considered available for capacity purposes unless they satisfy all skill requirements of a job type (not just one of the skill requirements. Technicians without skills can only perform job types without skills. *Note: this is a ServiceTitan best practice, but Business unit technician mapping is only required for AdCap if you want to organize capacity based off Business Units. Business unit mapping can be ignored for Adcap otherwise.*
	Settings > Employees > Permissions: *Edit Adaptive Capacity Settings* - allows employees to edit AdCap settings *Edit Adaptive Capacity Rules* - allows employees to edit rules *Access Get Adaptive Availability Filters* - allows employees to change default filters when using Get Adaptive Availability

❏	**Settings > Adaptive Capacity Settings** - Do your technicians work jobs across multiple Business Units? If so, our recommendation is to use skills to determine which technicians should be available for each job type. We generally recommend that job types themselves have no more than 1-2 skills, whereas technicians can have multiple skills. *Note: Please see the [setup overview deck](#) linked above for skill setup recommendations.*
❏	**Availability Threshold** : Creates a default buffer to account for drive time. The buffer creates a buffer between jobs and at the start of arrival windows. This will generally lead to underbooking so most of the time, the recommended value will be 0. *Ex:) A 2 hour job with a 30 minute threshold requires 2.5 hours of space to book*
❏	**Settings > Adaptive Capacity Settings > "Default to include Non-Managed Technicians' Capacity in Availability Calculation":** Our recommendation is to have this toggle disabled so that Non-Managed technicians are not included in capacity.
❏	**Settings > Adaptive Capacity Settings > "Default to include On Call Technician Shifts in Availability Calculation":** Determines whether you want On Call shifts to count towards capacity.
❏	**Settings > Adaptive Capacity Settings > "Default to include Zones in Availability Calculation":** Determines whether zones are considered for capacity. [Zones](#) should be used when you want technicians to only be included for capacity for specific Service areas. If you decide to include zones, ensure zones are properly created and assigned to your technicians.
❏	**Settings > Adaptive Capacity Settings > "Default to include Business Units in Availability Calculation"** We recommend only using this toggle when technicians are only meant to work jobs for a single Business Unit. In most scenarios, leaving this toggle off and using just job type and technician skills instead will produce better results.

❏	**Settings > Adaptive Capacity Settings > "Default to honor Business Unit Groups over Business Units"** Legacy setting meant to help migrate tenants using ACP onto AdCap and to account for technicians working jobs across multiple BUs. In most scenarios, leaving this toggle off and using job type skills instead will produce better results. *Note: If this toggle is on, <u>every BU within a BU group needs to be mapped to the job type.</u>* **This means that all mapped BU's will appear in the dropdown menu when a job type is selected on the call booking screen**
❏	**Settings > Job Types**: make sure job durations and <u>job skills</u> are accurate. The default is set to 2hrs, but the more accurate, the better your capacity calculations will be. Job types without skills can be assigned to any technician. If using the Business Unit filter, make sure to map job types to relevant BU's. If using the Business Unit Group filter, <u>every BU within a BU group needs to be mapped to the job type.</u> **This means that all mapped BUs will appear in the dropdown menu when a job type is selected on the call booking screen.** **Please note:** Changes made to job type skills **are not** retroactive, so changes made to skills will need to be mapped onto previously booked jobs via data task if you have concerns about previously booked capacity being accurate. Jobs booked after changes are made should inherit the job type skill. *Note: For the data task, reach out to support and request that the "Assign Job Type Skills to Job" tool be run for your account. Support will need a list of the job ID's that need to be updated.*
❏	**Settings > Adaptive Capacity Settings > Strategic Rules**: <u>Set up rules</u> to account for special circumstances, like strategic overbooking or underbooking. Our recommendation is to start simple and build towards complexity if needed. When rules conflict, we will use the strictest logic possible.
❏	**Gotchas and <u>Best Practices</u>:** ● Do not stack jobs or non job events to the same technician. Stacked jobs and events are all counted, so capacity will be filled up even though space will be open on the board. Ex: stacking two- two hour jobs on a tech for the same time will take away 4 hours not 2. ● Create shifts for all technicians if possible, or refrain from putting Jobs or NJE's on techs with No Shifts. Capacity will still be <u>consumed</u> even if a technician doesn't have a shift. ● Assign jobs to technicians as soon as possible to avoid a confusing report view.