



ACP SETUP CHECKLIST

Updated 08/04/2022

Please review the training links below for Adjustable Capacity Planning

Resources	Link
Setup Checklist Video	ACP Setup Checklist Walkthrough
Overview Training	Adjustable Capacity Planning Overview
Manager Training	Adjustable Capacity Planning for Managers
CSR Training	Adjustable Capacity Planning for CSRs
Seminar Recording	How to Master Scheduling with Adjustable Capacity Planning

Complete	ACP Checklist
<input type="checkbox"/>	Schedule > Technician Shifts- Setup Technician Shifts and make sure to update. <i>#1 reason capacity numbers don't look correct, & cases are opened with support.</i>
<input type="checkbox"/>	Settings > Technicians- Assign all technicians to a Business Unit who need to have capacity. <i>#2 reason cases are opened with support.</i>
<input type="checkbox"/>	If these techs work in multiple Business Units then put the BUs into Business Unit Groups to make capacity cover all techs with BUs listed.
<input type="checkbox"/>	Settings > Business Unit Groups > Base Capacity. (Default is 0) Recommended to keep at 0 until you see an opportunity to Overbook/ Underbook on every single arrival window within the BU Group. <i>(Cannot use if you have the skills option on, see next step)</i>
<input type="checkbox"/>	Settings > Capacity Configuration- Capacity View Options. Highly recommended to enable <i>custom arrival windows</i> , but not required. (See CSM to setup) If custom arrival window settings are on, then you MUST choose that option in this menu. Capacity Enhancement- Default On- <i>Manual Adjustments</i> or you can switch it to Skills which would match job type skills to technicians skills in availability & stop manual adjustments from being an option. (You can do one or the other)
<input type="checkbox"/>	Availability Threshold- Time between two jobs below the threshold will be thrown out of capacity availability. Recommend 30-59min depending on city traffic times. With the toggle " Apply availability threshold within arrival window boundaries " ON arrival window boundaries will also be used to compute time thrown out. So if time after a job- before the end of an arrival window- is smaller than the Availability Threshold, then that time will also be thrown out. <i>Default OFF</i>
<input type="checkbox"/>	" Don't include non-managed technicians in capacity calculations " toggle should be ON if you have any unmanaged techs that shouldn't be alone on jobs.
<input type="checkbox"/>	Settings > Employees- Permission: <i>Edit Business Hours And Capacity Planning and Manually Adjust Capacity</i> allow employees to be able to edit ACP settings and the <i>manager</i> capacity planning board. Few need access.
<input type="checkbox"/>	Settings > Job Types- Make sure job durations are accurate numbers so that capacity calculations are realistic to your estimated time off completion