



improve it 360
an EverCommerce Solution

Staff Setup &

Calendar Preferences

Agenda

Use Address on Staff to see Distance to Appointment on Scheduling Calendar

Color-code your Staff members on the Staff Calendar

How to enable Market Segments on the Calendar, User and Staff

Manage Calendar Preferences – what is displayed on the calendar

Using Staff Score to Sort the Calendar by NSLI or NPS

Custom Calendar Text on Appointment and Project Activity tiles

Staff Addresses

▼ Address & Contact Information

Street Address 1	4249 Easton Way
Street Address 2	
City	Columbus
State/Province	OH
Zip/Postal Code	43219
Email	carl@internet.com

▼ Address & Contact Information

Street Address 1	8394 W. Bowling Green Lane
Street Address 2	
City	Lancaster
State/Province	OH
Zip/Postal Code	43130
Email	stephensales@internet.com
Emergency Contact Relationship	

Complete the Address fields on the Staff record for each person's starting location. This could be your office, warehouse or even the rep's residence.

Scheduling Calendar

Sales Rep +	1	2
(None)	<input type="radio"/>	<input type="radio"/>
Bertram Sales Rep (5.52 mi)	<input checked="" type="radio"/>	<input checked="" type="radio"/>
Billy Sales Rep (5.52 mi)	<input checked="" type="radio"/>	<input checked="" type="radio"/>
Bobby Sales Rep (5.52 mi)	<input checked="" type="radio"/>	<input checked="" type="radio"/>
Sammy Sales (5.52 mi)	<input checked="" type="radio"/>	<input checked="" type="radio"/>
Stephen Sales (25.80 mi)	<input checked="" type="radio"/>	<input checked="" type="radio"/>

In this example, Stephen leaves from home, whereas our other Reps all leave from our office.

Staff Addresses allow Schedulers to see the **Distance** from the Staff member's Address to the Appointment being scheduled.

Color-code your Staff for the Calendar

Staff Filters

Capabilities
Any ▼

Product Categories
Any ▼

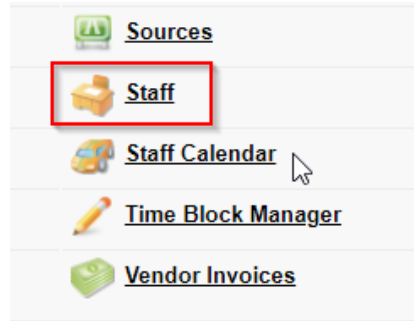
- (Not assigned)
- Anita Inside Sales
- Bertram Sales Rep
- Billy Sales Rep
- Bobby Sales Rep
- Calvin Installer
- Carl Installer
- Cecil Service
- Martha Marketing
- Olivia Admin
- Peter Project
- Sammy Sales
- Stephen Sales
- Steve Service
- Sylvia Service
- Wallace Warehouse

	Sun Mar 12	Mon Mar 13	Tue Mar 14	Wed Mar 15	Thu Mar 16	Fri Mar 17	Sat Mar 18
(Not assigned)							
Bertram Sales Rep			<div style="background-color: #ADD8E6; padding: 2px; font-size: 8px;"> 8-8p Zane Test (777) 888-5555 789 Zane St Columbus 43212 Doors </div>		<div style="background-color: #ADD8E6; padding: 2px; font-size: 8px;"> 1-10p Jason Smith (777) 888-5555 135 Village Drive Columbus 43214 Flooring </div>	<div style="background-color: #ADD8E6; padding: 2px; font-size: 8px;"> 3-10p Lisa Test (777) 888-5555 123 Main St Leoson 29458 Roofing </div>	
Billy Sales Rep			<div style="background-color: #ADD8E6; padding: 2px; font-size: 8px;"> 10-7-30p Marco Test (777) 888-5555 1218 West 5th Columbus 43212 Windows </div>			<div style="background-color: #ADD8E6; padding: 2px; font-size: 8px;"> 8-6p Quize Testing (777) 888-5555 4248 Exeton Way Columbus 43214 Siding </div>	
Bobby Sales Rep			<div style="background-color: #ADD8E6; padding: 2px; font-size: 8px;"> 4-30p-6-30p Dorell Areaga (881) 322-5195 (881) 322-9151 2645 Standard St Bakersfield 93308 Flooring </div>			<div style="background-color: #ADD8E6; padding: 2px; font-size: 8px;"> 3-10p-3-30p Jaime Aubin (211) 888-0082 (211) 888-0059 555 S Grand Ave # 400 Los Angeles 90071 Windows </div>	
Carl Installer	<div style="background-color: #FFA500; padding: 2px; font-size: 8px;"> 7-30a-1:30p install Pearl Drive and Atlanta Test (777) 888-5555 64 North High Columbus 43215 Doors </div>	<div style="background-color: #FFA500; padding: 2px; font-size: 8px;"> 8-4p install Virginia Test (777) 888-5555 1222 North High St Columbus 43202 Siding </div>	<div style="background-color: #FFA500; padding: 2px; font-size: 8px;"> 8-30a-12:30p install Andrew Lane (777) 888-5555 1500 West 5th Columbus 43212 Windows </div>				
Cecil Service				<div style="background-color: #32CD32; padding: 2px; font-size: 8px;"> 8-4p install 2 Matt Cameron (777) 888-5555 100 Chemical Columbus 43216 </div>			
Peter Project	<div style="background-color: #FF4500; padding: 2px; font-size: 8px;"> 7-30a-1:30p Measure Pearl Drive and Atlanta Test (777) 888-5555 64 North High Columbus 43215 Doors </div>	<div style="background-color: #FF4500; padding: 2px; font-size: 8px;"> 8-4p install Virginia Test (777) 888-5555 1222 North High St Columbus 43202 Siding </div>	<div style="background-color: #FF4500; padding: 2px; font-size: 8px;"> 8-30a-12:30p Measure Andrew Lane (777) 888-5555 1500 West 5th Columbus 43212 Windows </div>	<div style="background-color: #FF4500; padding: 2px; font-size: 8px;"> 8-10p Measure Louise Test (777) 888-4555 1232 North High St Columbus 43202 Siding </div>			
Sammy Sales	<div style="background-color: #0000FF; padding: 2px; font-size: 8px;"> 8p Merry Ashworth (262) 262-9743 (262) 262-9784 127 W Elmwood Ave Bismarck 74831 Doors </div>			<div style="background-color: #0000FF; padding: 2px; font-size: 8px;"> 8-4p install Matt Cameron (777) 888-5555 100 Chemical Columbus 43216 </div>	<div style="background-color: #0000FF; padding: 2px; font-size: 8px;"> 8-10p Measure Andrew Lane (777) 888-5555 1500 West 5th Columbus 43212 Windows </div>	<div style="background-color: #0000FF; padding: 2px; font-size: 8px;"> 8-4p install 3 Matt Cameron (777) 888-5555 100 Chemical Columbus 43216 </div>	
Stephen Sales					<div style="background-color: #0000FF; padding: 2px; font-size: 8px;"> 3p-11a Larry Test (777) 888-5555 124 Main St Columbus 43215 Bathrooms Doors </div>	<div style="background-color: #0000FF; padding: 2px; font-size: 8px;"> 8p-12p Sean Carter (777) 888-5555 110 N 21st St Newark 43005 </div>	
Steve Service	<div style="background-color: #32CD32; padding: 2px; font-size: 8px;"> 8-10p install Ernest Anderson (312) 888-0045 (312) 888-0040 643 W Monroe St Chicago 60607 Windows </div>					<div style="background-color: #32CD32; padding: 2px; font-size: 8px;"> 8-10p Measure Andrew Lane (777) 888-5555 1500 West 5th Columbus 43212 Windows </div>	

Quickly spot who is assigned an Appointment or Project Activity from the Calendar.

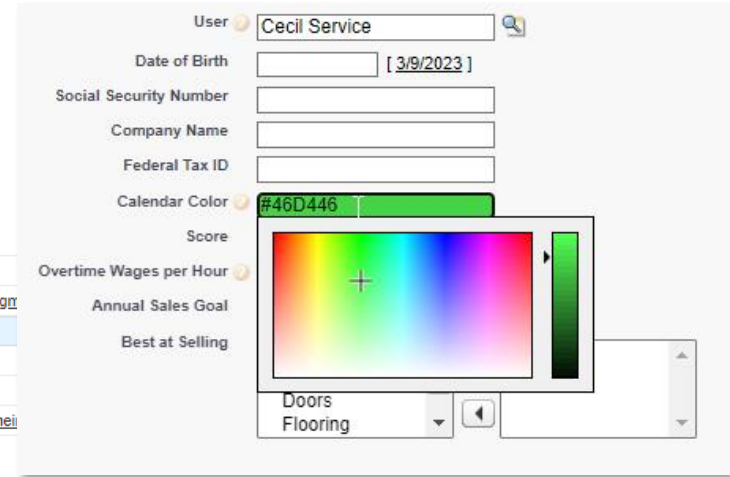
Edit the Color of each Staff record

Navigate to Staff tab



Adjust Calendar Color

<input type="checkbox"/>	Edit Del	Carl Installer	#FFE121	9.10	cari@internet.com
<input type="checkbox"/>	Edit Del	Cathy Call Center	#FF0000	0.00	flahertyalexander58@gm
<input type="checkbox"/>	Edit Del	Cecil Service	#46D446	8.95	cecil@internet.com
<input type="checkbox"/>	Edit Del	eLead Connection User	#00FF00		
<input type="checkbox"/>	Edit Del	Johnny DML Error	#FF0000	0.00	dml@internet.com
<input type="checkbox"/>	Edit Del	Martha Marketing	#A317A3	0.00	martha@universalhomei



A user profile form for 'Cecil Service'. Fields include Date of Birth (3/9/2023), Social Security Number, Company Name, and Federal Tax ID. The 'Calendar Color' field shows a green color swatch with the hex code #46D446. Below it is a color picker tool with a rainbow spectrum and a vertical slider. Other fields include Score, Overtime Wages per Hour, Annual Sales Goal, and Best at Selling (with a dropdown menu showing 'Doors' and 'Flooring').

Edit the Staff record

Best Practice: Two People on the same Crew?

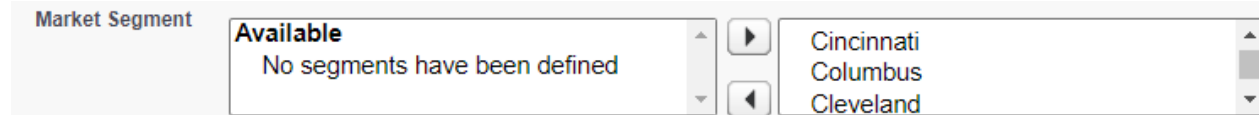
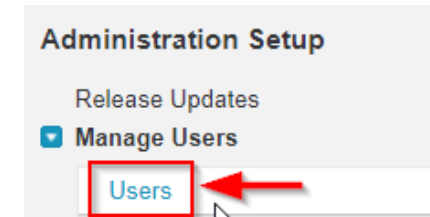
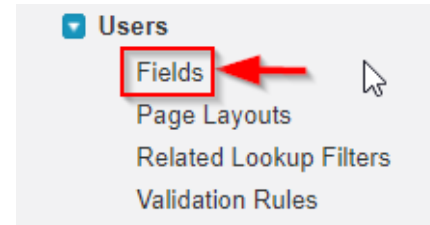
Copy and Paste the Hexadecimal code to make Staff members the same color if they are always working together

Set Market Segment Values for Staff/Users

1: Set Values

Setup > Customize > Users > Fields > Market Segment

Values			
Action	Values	API Name	Default
<input type="checkbox"/> Edit Del Deactivate	No segments have been defined	No segments have been defined	<input type="checkbox"/>
<input type="checkbox"/> Edit Del Deactivate	Cincinnati	Cincinnati	<input type="checkbox"/>
<input type="checkbox"/> Edit Del Deactivate	Columbus	Columbus	<input type="checkbox"/>
<input type="checkbox"/> Edit Del Deactivate	Cleveland	Cleveland	<input type="checkbox"/>
<input type="checkbox"/> Edit Del Deactivate	Dayton	Dayton	<input type="checkbox"/>



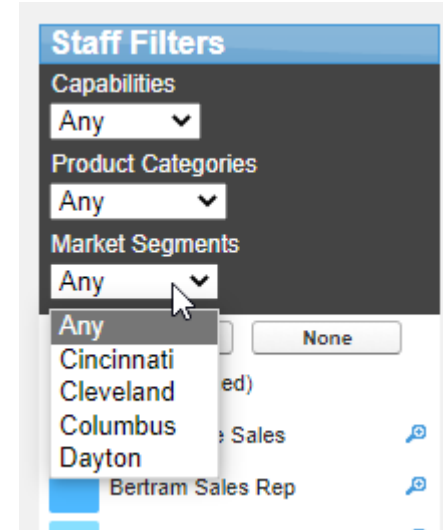
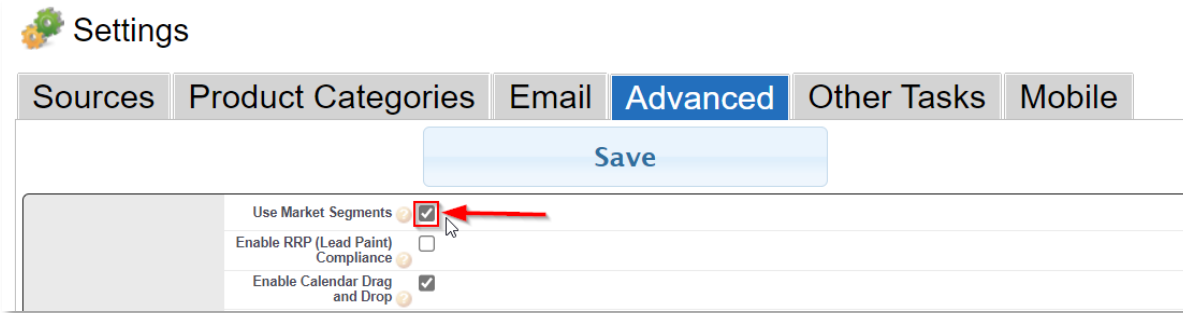
2: Select each User's Market Segments

Setup > Manage Users > Users > Edit User > Market Segment

Enable Market Segment Filters on the Calendar

3: Enable 'Use Market Segments' checkbox

Settings > Advanced > Use Market Segments > Save



Be sure to set Market Segments for Inactive Users too!

This does not add Market Segment to Prospect, Appointment, Sale or Project objects. For a more advanced Market Segment setup, see also: [Zip Code customization](#)

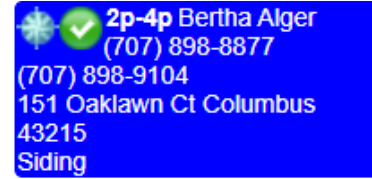
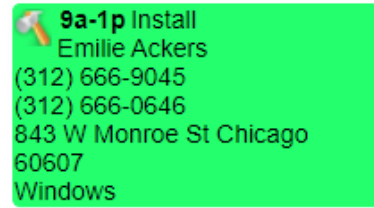
Manage Calendar Preferences

Certain Fields can be displayed on the Staff Calendar tiles using Calendar Preferences under the Custom Settings menu.

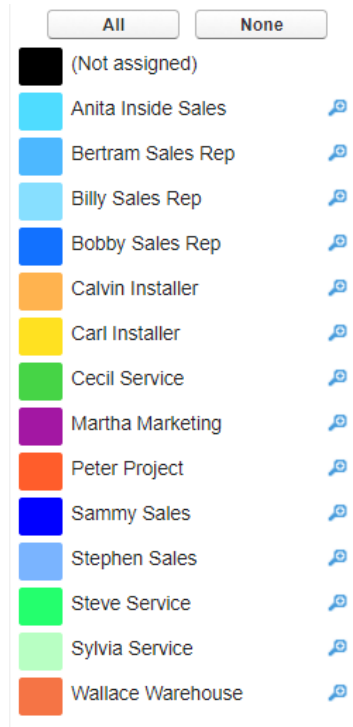
▼ Default Organization Level Value	
Location	<u>Universal Home Improvement</u>
Appt Title: Show City	<input checked="" type="checkbox"/>
Appt Title: Show Phone	<input checked="" type="checkbox"/>
Appt Title: Show Zip	<input checked="" type="checkbox"/>
Project Title: Show City	<input checked="" type="checkbox"/>
Project Title: Show Phone	<input checked="" type="checkbox"/>
Project Title: Show Zip	<input checked="" type="checkbox"/>
Appt Title: Show Appt Custom	<input type="checkbox"/>
Sort Staff by Score	<input type="checkbox"/>
Project Activity: Record Owner Time Zone	<input type="checkbox"/>
Appt Title: Show Address	<input checked="" type="checkbox"/>
Appt Title: Show Components	<input checked="" type="checkbox"/>
Appt Title: Show Prospect	<input checked="" type="checkbox"/>
Project Title: Show Address	<input checked="" type="checkbox"/>
Project Title: Show Job Type	<input checked="" type="checkbox"/>
Project Title: Show Prospect	<input checked="" type="checkbox"/>
Project Title: Show Project Custom	<input type="checkbox"/>
Appt Title: Show Distance to Next Appt	<input type="checkbox"/>
Show Staff Score(s)	<input type="checkbox"/>

- Prospect Name
- Phone(s)
- Street Address, City and Zip
- Product Category
- Custom Calendar Text

Check out this Article on adjusting [Calendar Preferences](#)



Using Staff Score to Sort the Calendar



By default, Staff are listed Alphabetically in the Staff Calendar Filters menu

Enable in Calendar Preferences

Show Staff Score(s)

Sort Staff by Score

Both Settings must be Enabled

Check out our Help Center Article on [Enabling Staff Score and Sorting by Score](#)

Using Staff Score to Sort the Calendar

This field could be used to store data like NSLI, ADL or NPS Scores, or a combination.

Information

Staff Name	Billy Sales Rep	User	Billy_Sales_Rep
Position Title		Date of Birth	
Employment Type		Social Security Number	
Start	4/17/2019	Company Name	
End		Federal Tax ID	
Market Segment		Calendar Color	
Score	3,245.97	Staff First Name	Billy
Overtime Wages per Hour		Base Wages per Hour	
Annual Sales Goal	\$100,000.00	Monthly Sales Goal	\$10,000.00
Best at Selling	Doors; Windows	Staff Capacity	3

When enabled, the Staff are sorted by Staff Score

All None




(Not assigned) ()	
Sammy Sales (3895.79)	
Bertram Sales Rep (3691)	
Billy Sales Rep (3245.97)	
Bobby Sales Rep (2789.6)	
Stephen Sales (2654.25)	
Peter Project (9.20)	
Sylvia Service (9.20)	
Carl Installer (9.10)	
Steve Service (9.10)	
Cecil Service (8.95)	
Calvin Installer (8.75)	
Anita Inside Sales (0.00)	
Martha Marketing (0.00)	
Wallace Warehouse (0.00)	

In my example system, the Sales staff are scored on NSLI, while the Installers and Service staff are scored on NPS.

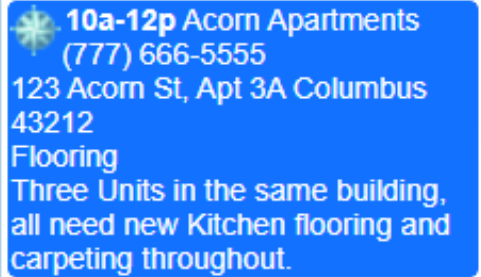
Add something Custom to the Calendar tiles

Create a Flow or Process automation to update the Custom Calendar Text Field with the data you'd like displayed on the Calendar.

Simply use a Text Field on the Appointment to enter the data you want to appear on the calendar...

Information	
Status	 Assigned
Type	New
Comments	
One Drive URL	
Appt Calendar Comments	 Three Units in the same building, all need new Kitchen flooring and carpeting throughout.

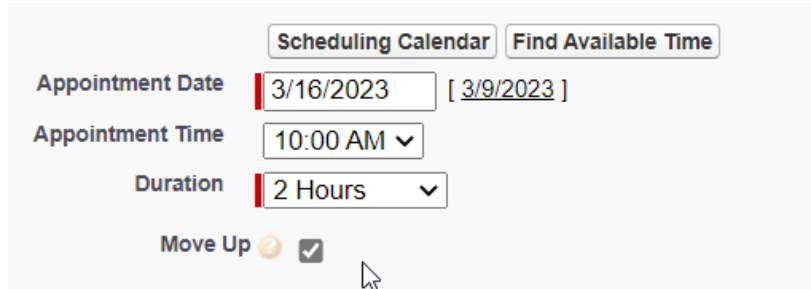
Type the Details here which will appear on the Staff Calendar



 **10a-12p** Acorn Apartments
(777) 666-5555
123 Acorn St, Apt 3A Columbus
43212
Flooring
Three Units in the same building,
all need new Kitchen flooring and
carpeting throughout.

improvet 360 can further Customize your Calendar tiles

Display icons using Text formulas and HTML! Starting at \$500 our team can create automation to populate icons and custom data.



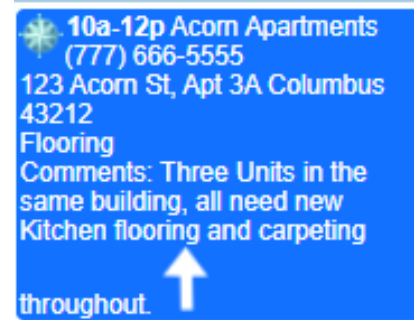
Scheduling Calendar Find Available Time

Appointment Date 3/16/2023 [3/9/2023]

Appointment Time 10:00 AM ▾

Duration 2 Hours ▾

Move Up



10a-12p Acorn Apartments
(777) 666-5555
123 Acorn St, Apt 3A Columbus
43212
Flooring
Comments: Three Units in the
same building, all need new
Kitchen flooring and carpeting
throughout.

In this example the **Move Up** checkbox on the Appointment page is represented on the Calendar tile as a White Arrow. When the checkbox is True, the arrow is displayed.

Note: Custom Calendar Text Field is limited to 2048 Characters

How to reach us?

1. Admins – Use the Help Bot within your system: Click **Get in Touch**
2. Open a Ticket at:
<https://support.improveit360.com/>
3. Or Email Us: support@improveit360.com

Support Office Hours:

Monday – Friday, 9am-5:30pm Eastern time

