

Appointment Scheduling

Scheduling Calendar

Staff Capabilities

Distance to Next Appointment

Time Block Scheduling

Staff Calendar Filtering

Custom Calendar Text

Appointment Report Counts



improveit 360

Agenda

Review the common Appointment Scheduling functionality:

- Scheduling Calendar – from Appointment Edit page
 - ❑ Distance to Staff Address and Distance to Next Appointment
 - ❑ Staff Capabilities & Market Segment Filters
- Time Block Scheduling
 - ❑ Assign to Reps later
 - ❑ Group Appointments by Market Segment or Product Category
- Staff Calendar Filtering, Views, and Printing & Emailing
 - ❑ Staff Filters: Capabilities, Product Categories, Market Segment
 - ❑ Event Filters: Appointments, Project Activities, Events
- Calendar Preferences
 - ❑ Set which fields are visible on the Calendar for Appointments and Project Activities
 - ❑ Supports custom fields and HTML – let us know if you want something custom
- Appointment Report Count Fields – what is “Issued” ?

Scheduling Calendar

- On Edit page of Appointment object
- Sorted Staff by Name
- Filtered based on Product Category of Appt
- Distance to previous/next Appointment and Staff
- Filtered by Market Segment (if enabled)

Scheduling Calendar Find Available Time

Appointment Date [11/5/2024]

Appointment Time

Duration

Move Up ☐

Scheduling Calendar

Time Duration

Staff filters:
Sales ☒ Projects ☐ Services ☐

Product Categories:
Windows;

Tuesday, August 13, 2024

☐ This appointment

| Sales Rep | 1 | 2 | 9:00 AM | 9:30 AM | 10:00 AM | 10:30 AM | 11:00 AM | 11:30 AM | 12:00 PM | 12:30 PM | 1:00 PM | 1:30 PM | 2:00 PM | 2:30 PM | 3:00 PM | 3:30 PM | 4:00 PM | 4:30 PM | 5:00 PM | 5:30 PM | 6:00 PM |
|-------------------------------|-----------------------|-----------------------|---------|---------|----------|----------|----------|----------|----------|----------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|
| (None) | <input type="radio"/> | <input type="radio"/> | | | | | | | | | | | | | | | | | | | |
| Bertram Sales Rep (384.90 mi) | <input type="radio"/> | <input type="radio"/> | | | | | | | | | | | | | | | | | | | |
| Billy Sales Rep | <input type="radio"/> | <input type="radio"/> | | | | | | | | | | | | | | | | | | | |
| Bobby Sales Rep (384.90 mi) | <input type="radio"/> | <input type="radio"/> | | | | | | | | | | | | | | | | | | | |
| Brittani Farwick | <input type="radio"/> | <input type="radio"/> | | | | | | | | | | | | | | | | | | | |
| Derrick Products | <input type="radio"/> | <input type="radio"/> | | | | | | | | | | | | | | | | | | | |
| Sammy Sales (384.90 mi) | <input type="radio"/> | <input type="radio"/> | | | | | | | | | | | | | | | | | | | |
| Stephen Sales (379.57 mi) | <input type="radio"/> | <input type="radio"/> | | | | | | | | | | | | | | | | | | | |

Chasse (92.03 mi, Columbus)
Appt: Chasse, Kirsten Windows (1 Woodland Ave, Columbus, OH 43215)

Bravata (950.41 mi, Minneapolis) Alger (2,492.83 mi, Cotati)

Staff Capabilities & Market Segment

The most common reasons someone does not show up on the Calendar.

Staff – Set Capabilities

User – Set Market Segment(s)

Capabilities

Sales Capabilities Available Chosen

Available: Painting

Chosen: Bathrooms, Doors, Flooring, Roofing, Service

Project Capabilities Available Chosen

Available: Bathrooms, Doors, Flooring, Painting, Roofing

Chosen: (empty)

Market Segment

No segments have been defined
Cleveland
Dayton

Chosen
Cincinnati
Columbus

Sources

Staff

Staff Calendar

Staff – Calendar Color

Calendar Color #1271FF

Score

Color selection interface with a rainbow gradient and a blue color bar.

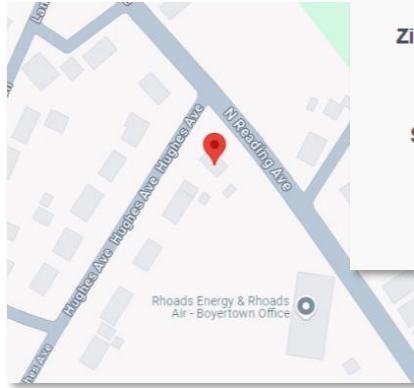
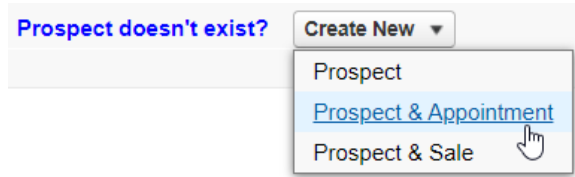
Administration Setup

Release Updates

☒ **Manage Users**

Users

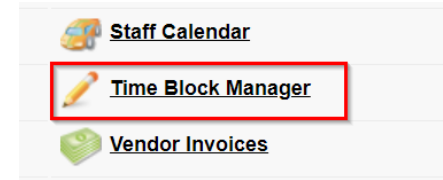
Distance to Next Appointment



| | | |
|-----------------|--|----------------------------------|
| Address | <input type="text" value="865 N Reading Ave"/> | |
| Zip/Postal Code | <input type="text" value="19545"/> | <input type="button" value="Q"/> |
| City | <input type="text" value="New Berlinville"/> | |
| State/Province | <input type="text" value="PA"/> | |
| Latitude | <input type="text" value="40.345084000000000"/> | |
| Longitude | <input type="text" value="-75.627629000000000"/> | |

- Geocoding is done when the Appointment is created to get a Latitude and Longitude
- Using 'Prospect & Appointment' feature, cannot display Distance because the Appointment is not yet created (geocoding hasn't happened yet)
- If one or both addresses do not have a Latitude & Longitude, no Distance can be displayed

Time Block Scheduling



| 13 | 14 | 15 |
|---------------------------------|---------------------------------|---------------------------------|
| 8:00a-5:00p: Default Value Time | 8:00a-5:00p: Default Value Time | 8:00a-5:00p: Default Value Time |
| 8:00a-5:00p: Default Values | 8:00a-5:00p: Default Values | 8:00a-5:00p: Default Values |
| 9:00a-12:00p: 9am - 12pm | 9:00a-12:00p: 9am - 12pm | 9:00a-12:00p: 9am - 12pm |
| 1:00p-4:00p: 1pm-4 pm | 1:00p-4:00p: 1pm-4 pm | 1:00p-4:00p: 1pm-4 pm |
| 5:00p-8:00p: 5pm-8pm | 5:00p-8:00p: 5pm-8pm | 5:00p-8:00p: 5pm-8pm |

- Allows quick assignment to a Block of time.
- Appointment Schedulers unfamiliar with Sales Reps and not assigning Appointments
- Capacity Scheduling allows blocks to be filled, and Appointments assigned to the Reps later

Repeating Time Block Name

Days of Week

Available

Sat
Sun

Chosen

Mon
Tue
Wed
Thu
Fri

Start Time

End Time

Start Range

End Range

Issue Rate (%)

Available Sales Reps

Market Segments

Available

Dayton

Chosen

Cincinnati
Cleveland
Columbus

Product Categories

Available

Bathrooms
Doors
Flooring
Painting
Roofing

Chosen

Siding
Windows

Appointment Manager tool

Appointment Information

Prospect

Gayhart, Damion

Lead Source

Gayhart, Damion: 2024 Franklin County Home and Garden Show

Prospect Status

Prospect

Location

28 Warwick St
Boyertown, PA 19512

Interested In

Windows

Prospect Phone Display

(610) 367-4692 ()
(610) 367-5713 ()

Appointment Time

6:00 PM

Duration

2 Hours

Sales Rep 1

Sales Rep 2

Confirmed On

[11/7/2024]

Confirmed By

Confirmed with

--None--

Comments

Appt Calendar Comments

CompanyCam Link

Save and get next Appointment


Result


Sales Rep Information


Hide unavailable Reps ✓

Filter Reps by Capability

| Set Rep | Name | Dist from Rep | Prev Appt | Next Appt |
|---------|------------------|---------------|--------------------------|-------------------------|
| 1 2 | Billy Sales Rep | - | 5:00p-7:00p (2492.43 mi) | - |
| 1 2 | Brittani Farwick | - | - | - |
| 1 2 | Cecil Service | 389.75 | - | 6:30p-8:30p (666.87 mi) |
| 1 2 | Derrick Products | - | - | - |
| 1 2 | Olivia Admin | - | - | - |
| 1 2 | Sammy Sales | 384.69 | 11:30a-1:30p (93.02 mi) | - |
| 1 2 | Stephen Sales | 379.30 | - | - |
| 1 2 | Steve Service | 389.75 | 5:00p-7:00p (558.29 mi) | - |

 **Accounts**

 **Appointment Manager**

 **Appointments**

See Distance to Next and Previous Appointment
Quickly Assign a Rep
Confirm Appointments at the same time
Result as Canceled if needed

Staff Calendar Filtering

Filter **Staff** members by:

- Capabilities (Sales, Projects, Services)
- Product Categories
- Market Segments

Filter the **blocks** on the Calendar by:

- Product Categories
- Type (Appointment, Project Activity, Event)
- Market Segments

Staff Filters

Capabilities
Sales ▾

Product Categories
Bathrooms ▾

Market Segments
Any ▾

All None

(Not assigned)

Billy Sales Rep

Bobby Sales Rep

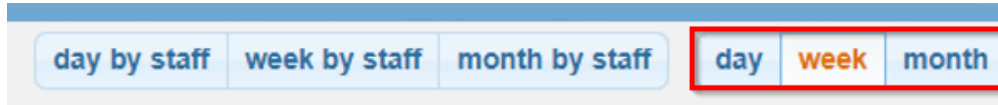
Brittani Sales

Sammy Sales

Stephen Sales

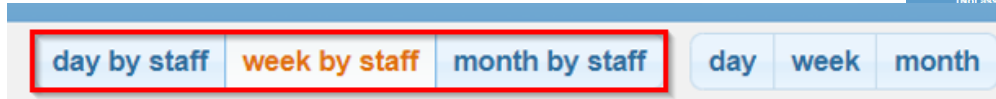
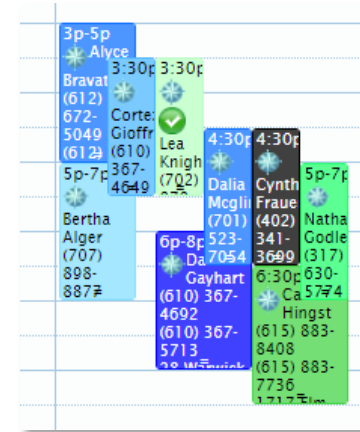
| Product Categories Bathrooms ▾ Types Appointments ▾ Market Segments Any ▾ | | | | |
|---|---|------------|------------|------------|
| 7 2024 | | | | |
| day by staff week by staff month by | | | | |
| Mon Aug 12 | Tue Aug 13 | Wed Aug 14 | Thu Aug 15 | Fri Aug 16 |
| | <div><div></div>Waldo Guritz (570) 823-6932 (570) 823-4498 558 Hazle St Wilkes Barre 18702 Bathrooms</div> <div><div></div>4:30p-6:30p Cynthia Frauenfelder (402) 341-3699 (402) 341-0511 409 S 17th St Omaha 68102 Bathrooms</div> | | | |

Staff Calendar Views



Day / Week / Month

- Display all Staff lumped together
- Different color blocks (based on Staff color) on each day



Day by Staff / Week by Staff / Month by Staff

- Display Staff in Rows, grouping each Staff member's events together
- Scroll down to see more Staff
- Use Staff Filters to reduce number of Rows displayed

| | Sun Aug 11 | Mon Aug 12 | Tue Aug 13 | Wed Aug 14 |
|-----------------|------------|---|---|--|
| (Not assigned) | | | Waldo Gurtz (570) 823-4092 501 Hazle St Wilkes Barre 18702 Bathrooms | 4p-6p Zane Opunui (434) 296-3688 418 Park St Charlottesville 22902 Roofing |
| Debra Sales Rep | | 3:30p-5:30p Cynthia Frauenfelder (402) 341-3699 (402) 341-5911 409 S 17th St Omaha 68102 Bathrooms | 3:30p-5:30p Cortez Gioffr (610) 357-4549 (610) 357-2571 335 N Reading Ave New Berlinville 19545 Windows | |
| Billy Sales Rep | | 1:30p-3:30p Kirsten Chasse (201) 870-1435 (201) 870-5003 1 Woodland Ave Columbus 43215 Windows | 5p-7p Bertha Alger (707) 998-6877 (707) 998-9104 Box #215 Cotati 94931 Windows | |
| Bobby Sales Rep | | 3p-5p Alyce Bravat (812) 672-5049 (812) 672-2249 150 S 5th St #3000 Minneapolis 55402 Doors | 4:30p-6:30p Dalia Moglin (701) 523-7054 (701) 523-3236 312 S Main Bowman 58823 Doors | 6p-8p Damon Gayhart (610) 357-4892 (610) 357-4513 28 Warwick St Boyertown 19512 Windows Comments: Husband and Wife must both be present. Bring Casement sample, they do not want to see any DH. N |
| Cecil Service | | 3:30p-5:30p Lea Knighton (702) 878-2130 (702) 878-2563 3202 W Charleston Blvd Bldg Las Vegas 89102 Roofing Comments: Interested in metal roof options with snow bars on north facing side. N | 6:30p-8:30p Cara Hingst (815) 883-8403 (815) 883-7736 1717 Elm Hill Pike Nashville 37210 Bathrooms Comments: Full bathroom, first floor master. Interested in jacuzzi tub. Bring jetted tub catalog. N | 5p-7p Nathan Goodale (317) 630-5774 (317) 630-7217 501 Indiana Ave Indianapolis 46202 Doors |

Staff Calendar Drag and Drop

All Unassigned Appointments at the top in Black
Quickly Assign by dragging and dropping

Set View to **week by** View

day by staff **week by staff** month by staff

Scheduling Calendar | Print | Email

11/7/2024 [11/7/2024] Product Categories Any Types Any

today Aug 11 — 17 2024

| | Sun Aug 11 | Mon Aug 12 | Tue Aug 13 | Wed Aug 14 |
|-----------------|------------|------------|---|---|
| (Not assigned) | | | <div><p>NOT ASSIGNED 416 Park St, Charlottesville, VA 22902 (New) Roofing (Prospect) Zane Opunui</p></div> | |
| Billy Sales Rep | | | <div><p>Waldo Guritz (570) 823-6932 (570) 823-4498 558 Hazle St Wilkes Barre 18702 Bathrooms 4:30p-6:30p Cynthia Frauenfelder (402) 341-3699 (402) 341-0511 409 S 17th St Omaha 68102 Bathrooms</p></div> | <div><p>4p-6p Zane Opunui (434) 296-3666 (434) 296-5629 416 Park St Charlottesville 22902 Roofing</p></div> |
| Bobby Sales Rep | | | <div><p>5p-7p Bertha Alger (707) 898-8877 (707) 898-9104 Box #215 Cotati 94931 Windows</p></div> | |
| | | | <div><p>3p-5p Alyce Bravata (612) 672-5049 (612) 672-2249 150 S 5th St #2600 Minneapolis 55402 Doors 4:30p-6:30p Dalia McGlinn (701) 523-7054 (701) 523-3236 212 S Main Bowman 58623 Doors</p></div> | |

Staff Calendar Print and Email

- Select Date Range
- Choose which Staff members
- Select what you want to Print/Email



Staff Calendar

Full Calendar

Scheduling Calendar

Print

Email

Print Lead Sheets or Schedules

Select a date range in conjunction with one or multiple Staff members and then print out schedules or lead sheets all at one time.

1. Select Date Range:

From: [[11/7/2024](#)]

To: [[11/7/2024](#)]

2. Select Staff Members

- ☐ Alice Accountant
- ☐ Anita Inside Sales
- ☒ Bertram Sales Rep
- ☒ Billy Sales Rep
- ☒ Bobby Sales Rep
- ☐ Brittani Farwick
- ☐ Calvin Installer

3. Select a Print Option:

- ☒ Appointments grouped by date
- ☐ Schedules grouped by Staff
- ☐ Lead Sheets

Go!

Edit



Staff Calendar -
Appointments
grouped by date

[i360 Pro](#)

Edit



Staff Calendar -
Schedules grouped
by Staff

[i360 Pro](#)

Field Sets allow you to
add Custom Fields from
Appointment to the Email
or Print out

Calendar Preferences Menu

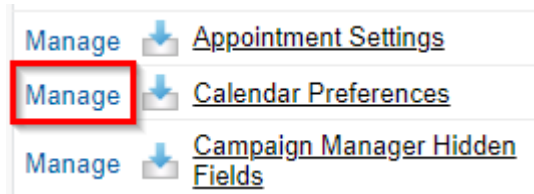
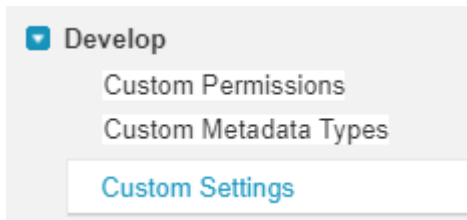
Only specific Fields can be displayed in Calendar blocks out-of-the-box:

Project Activity Calendar Fields:

Address
City
Job Type (Product Category)
Phone
Prospect
Zip Code
Custom Calendar Text

Appointment Calendar Fields:

Address
City
Phone
Prospect
Zip Code
Distance to Next Appointment
Custom Calendar Text



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

Calendar Custom Text

Customization:
Starts at \$500



Supports custom text fields and small custom icons or images:

Project Title: Show Project Custom ☒

Appt Title: Show Appt Custom ☒

Information

Status Resulted

Type Reset

Comments

One Drive URL

Appt Calendar Comments The homeowners are elderly. Their daughter Elaine will be meeting you for the Appointment and making buying decision but her parents (both homeowners) will need to sign.

Result Reminder Sent

Scheduling

Appointment Time 10/15/2024 at 2:00 PM (2 Hours)

Time Block

Move Up ☒

| Sun Oct 13 | Mon Oct 14 | Tue Oct 15 |
|------------|--|--|
| | | 2p-4p 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. |
| | 3:30p-5:30p Lea Knighton (702) 878-2130 (702) 878-8563 3202 W Charleston Blvd Bldg Las Vegas 89102 Roofing Comments:Interested in metal roof options with snow bars on north facing side | 2p-4p Bertha Alger (707) 898-8877 (707) 898-9104 151 Oaklawn Ct Columbus 43215 Siding Comments:The homeowners are elderly. Their daughter Elaine will be meeting you for the Appointment and making buying decision but her parents (both homeowners) will need to sign. |
| | | 5p-7p Vincenzo Agnello (601) 982-4002 (601) 982-8279 2295 Boling St Jackson 39213 Siding Comments:Bring Siding Samples this time. Customer could not decide without seeing samples. |

Appointment Report “Count” Fields

| Result | <-----Reporting Fields-----> | | | | | | | | | | | | | |
|------------------------|------------------------------|------|---------|---------|-------------|-------|------|------------|---------------|---------|-----------|------------------|----------|------|
| | Disregard in Statistics | Sold | One Leg | Not Run | Not Covered | Close | Demo | Not Demoed | Not Confirmed | No Show | Follow-up | Demoed, Not Sold | Canceled | Drop |
| ANY RESULT + Disregard | X | | | | | | | | | | | | | |
| Sold | | | | | | | | | | | | | | |
| One leg | | | | | | | | | | | | | | |
| Not Run | | | | | | | | | | | | | | |
| Not Demoed | | | | | | | | | | | | | | |
| Not Covered | | | | | | | | | | | | | | |
| Not Confirmed | | | | | | | | | | | | | | |
| No Show | | | | | | | | | | | | | | |
| Follow-up | | | | | | | | | | | | | | |
| Demoed, Not Sold | | | | | | | | | | | | | | |
| Canceled | | | | | | | | | | | | | | |
| Drop | | | | | | | | | | | | | | |
| Issue | | | | | | | | | | | | | | |
| Run | | | | | | | | | | | | | | |
| Sit | | | | | | | | | | | | | | |

No Result?

- Not Issued
- Not Demoed
- Not Run

**Appointments
MUST be
Resulted to
Count in
Reports**

Results are NOT Customizable

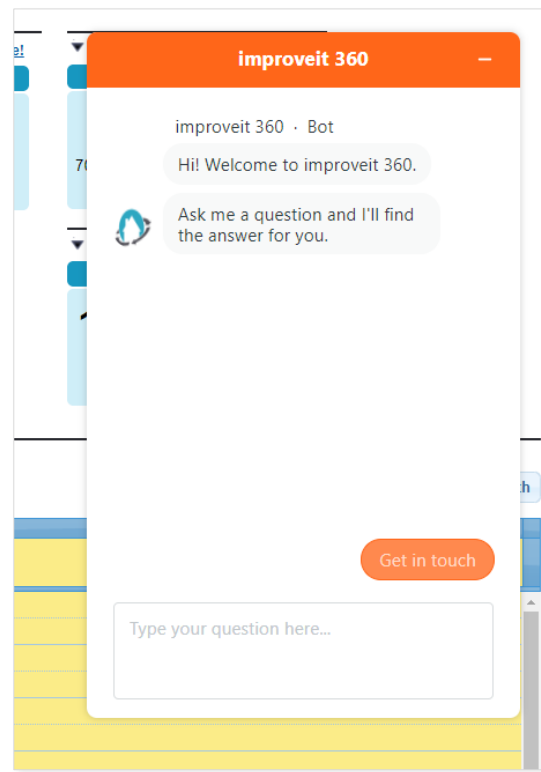
An “**Issued**” Appointment MUST have a Result of one of the following:
Sold, Demoed, Not Sold, Follow-up, No Show, Not Demoed, or One Leg

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



Thanks
for Attending



improveit 360