Appointment Scheduling

Scheduling Calendar
Staff Capabilities
Distance to Next Appointment
Time Block Scheduling
Staff Calendar Filtering
Custom Calendar Text
Appointment Report Counts

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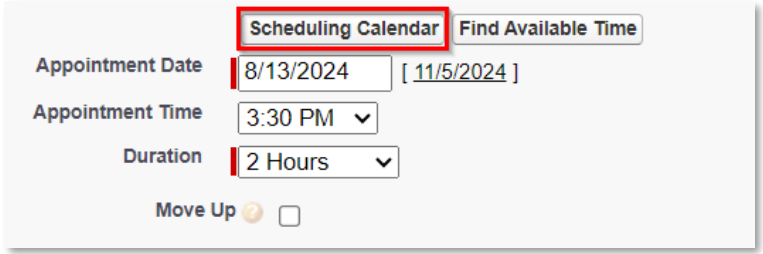
Agenda

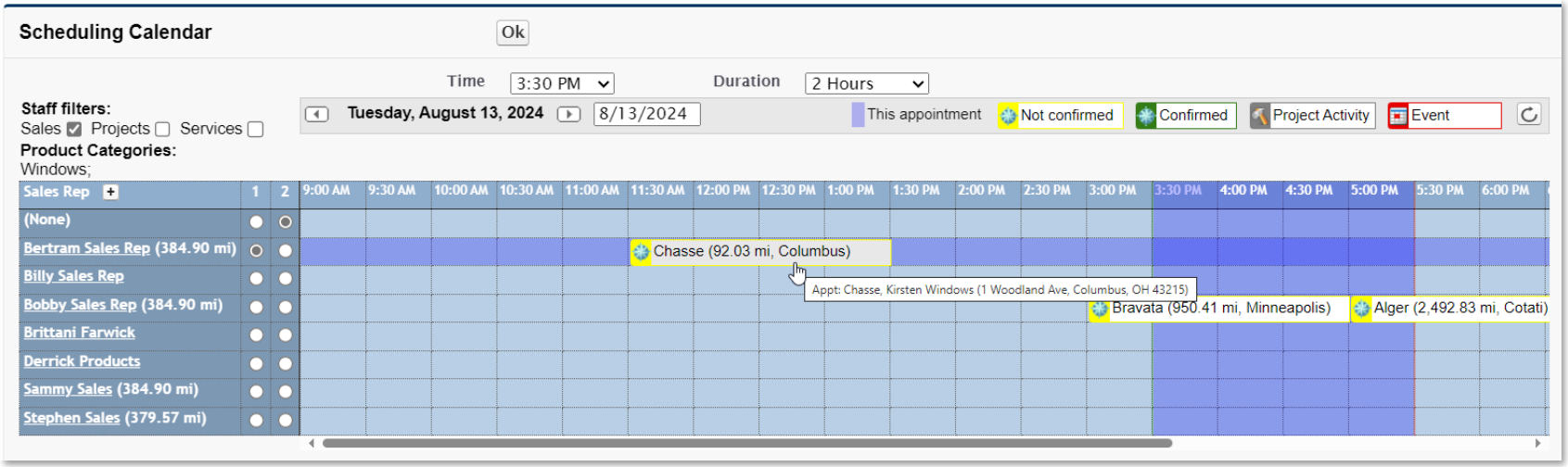
Review the common Appointment Scheduling functionality:

- 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” ?

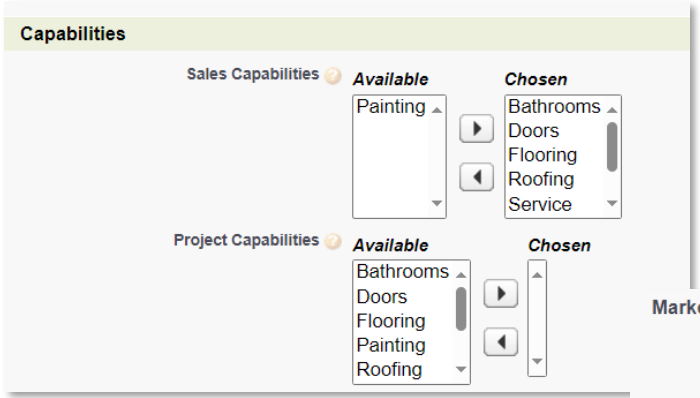
Scheduling Calendar

- 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)





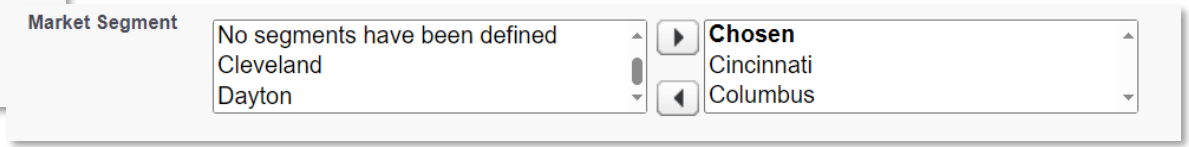
Staff Capabilities & Market Segment

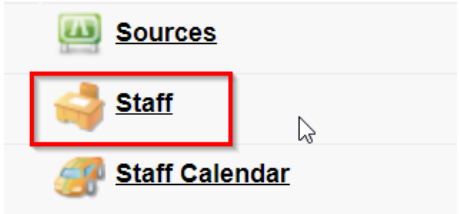


The most common reasons someone does not show up on the Calendar.

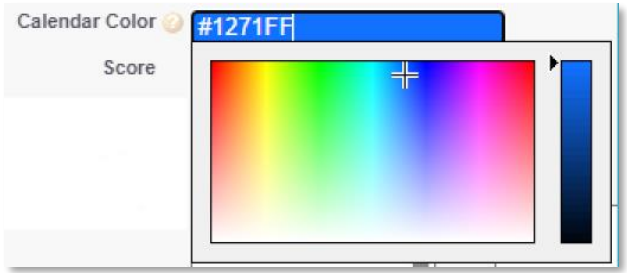
Staff – Set Capabilities

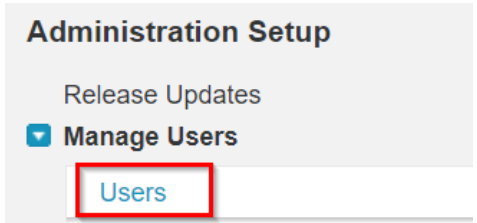
User – Set Market Segment(s)



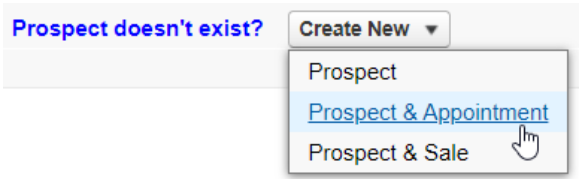


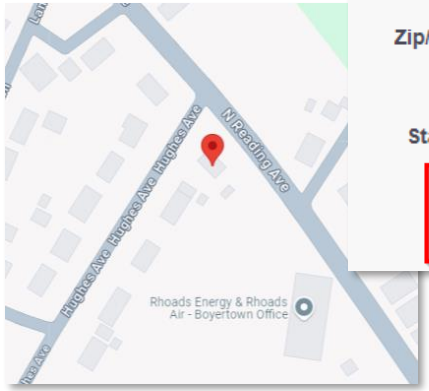
Staff – Calendar Color

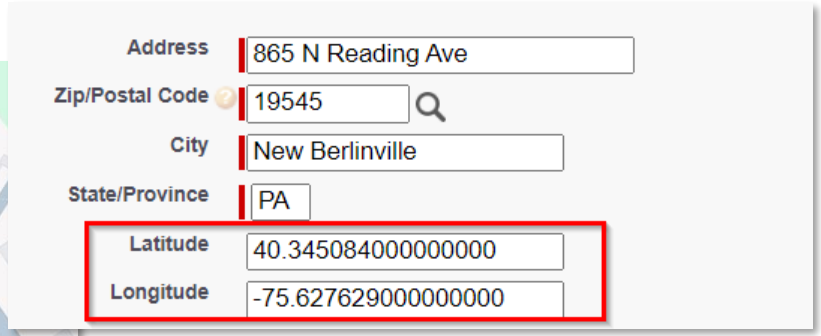




Distance to Next Appointment

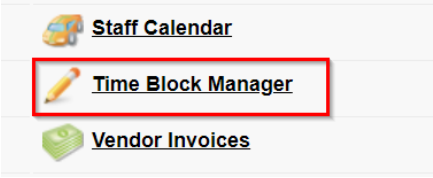


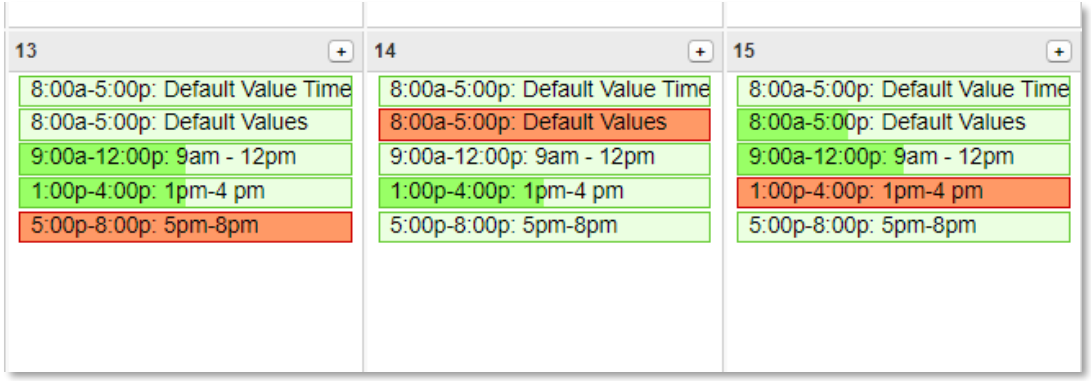


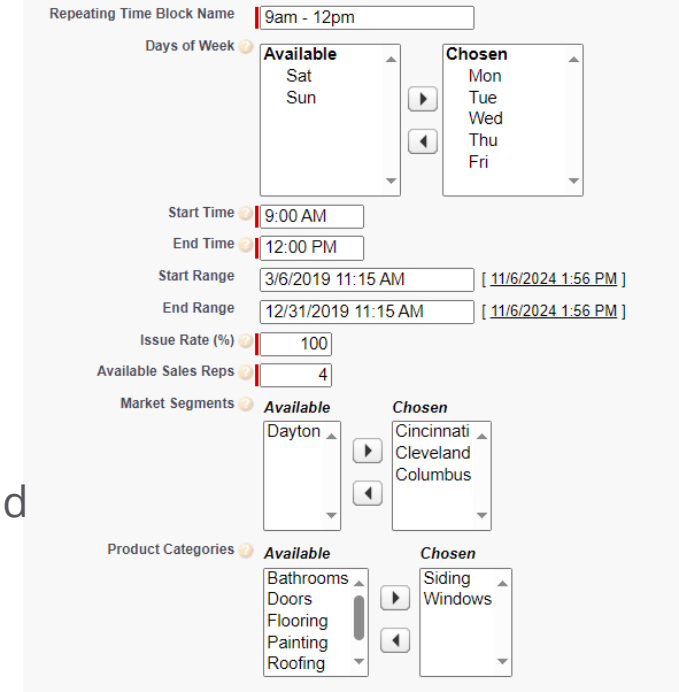


- Geocoding is done when the Appointment is created to get a Latitude and Longitude
- Using 'Prospect & Appointment' feature, cannot display Distance because the Appointment is not yet created (geocoding hasn't happened yet)
- If one or both addresses do not have a Latitude & Longitude, no Distance can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

Time Block Scheduling

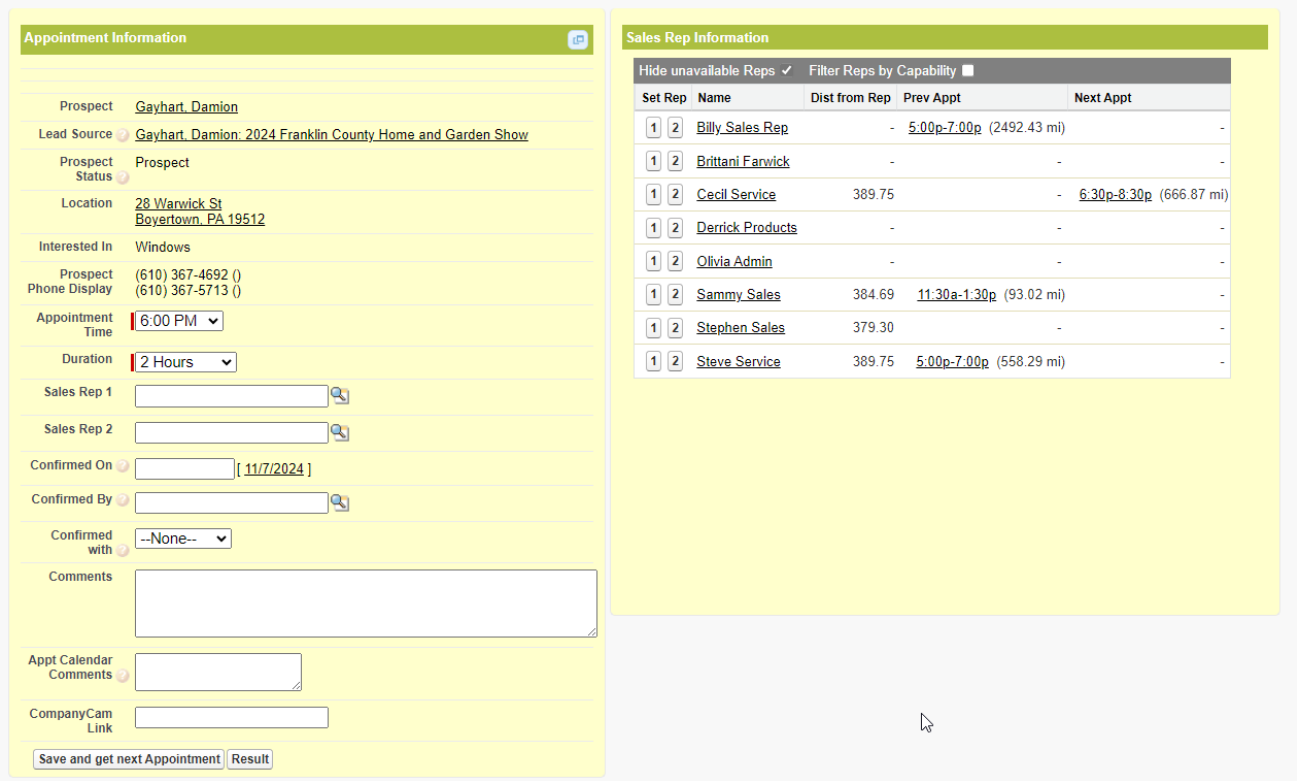


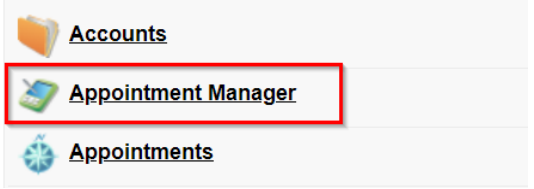




- Allows quick assignment to a Block of time.
- Appointment Schedulers unfamiliar with Sales Reps and not assigning Appointments
- Capacity Scheduling allows blocks to be filled, and Appointments assigned to the Reps later

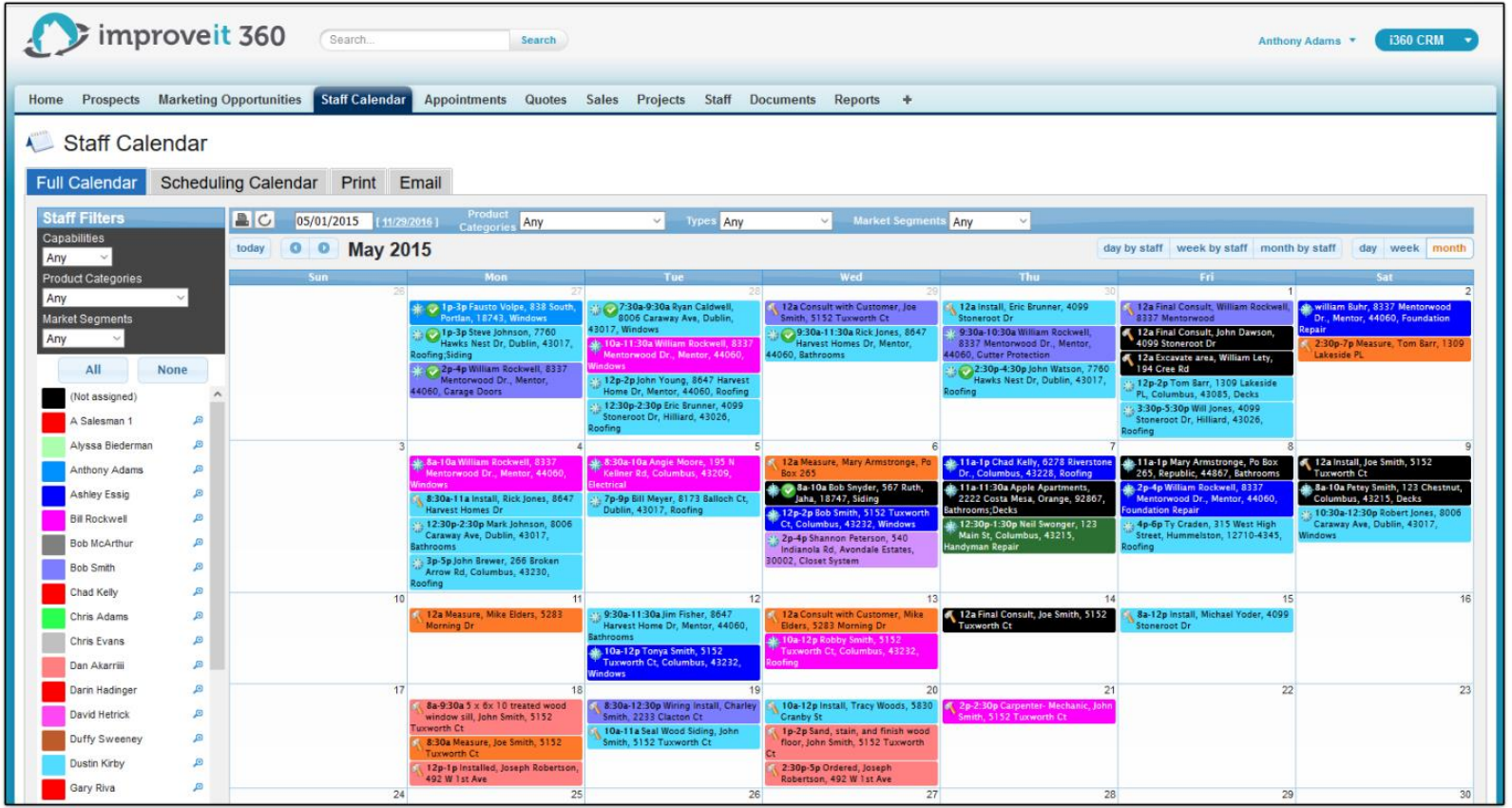
Appointment Manager tool





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

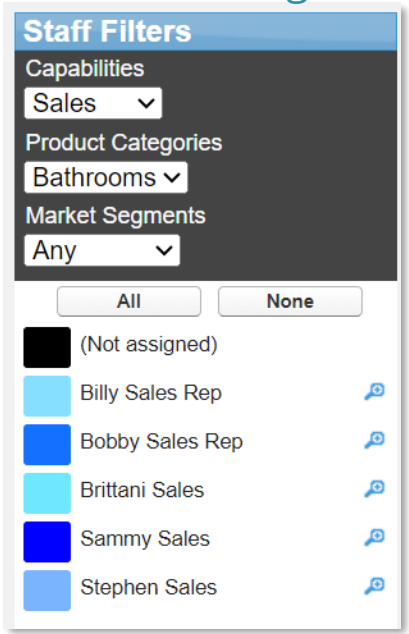
Staff Calendar



Staff Calendar Filtering

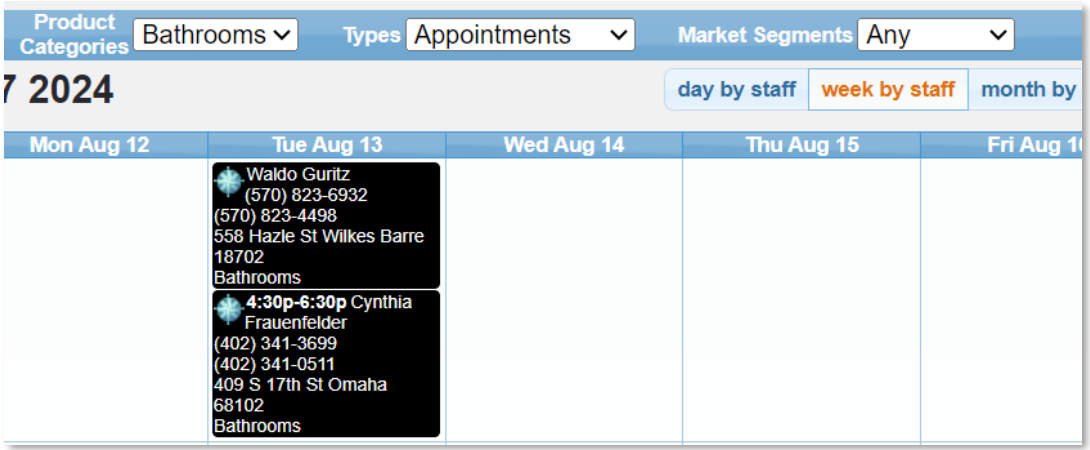
Filter **Staff** members by:

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

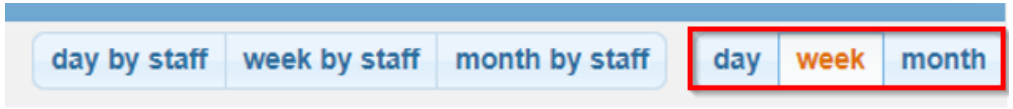


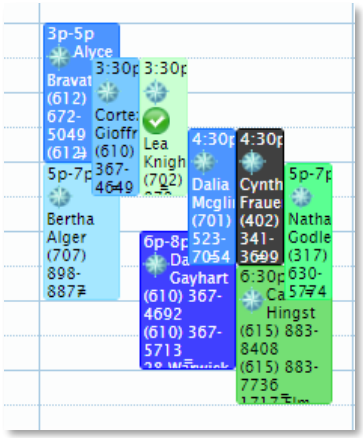
Filter the **blocks** on the Calendar by:

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



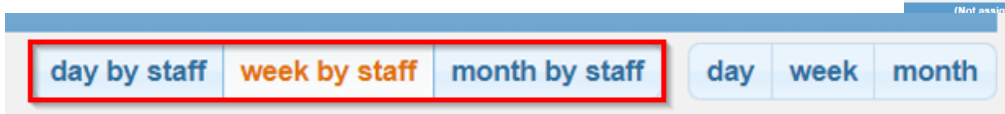
Staff Calendar Views





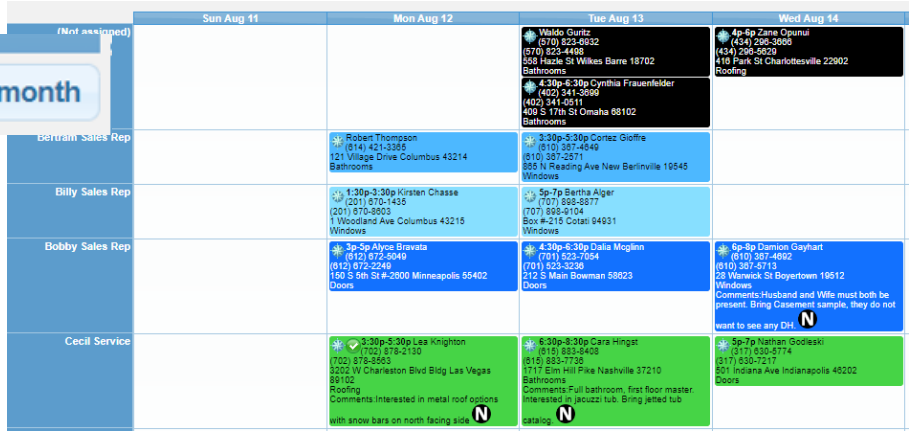
Day / Week / Month

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



Day by Staff / Week by Staff / Month by Staff

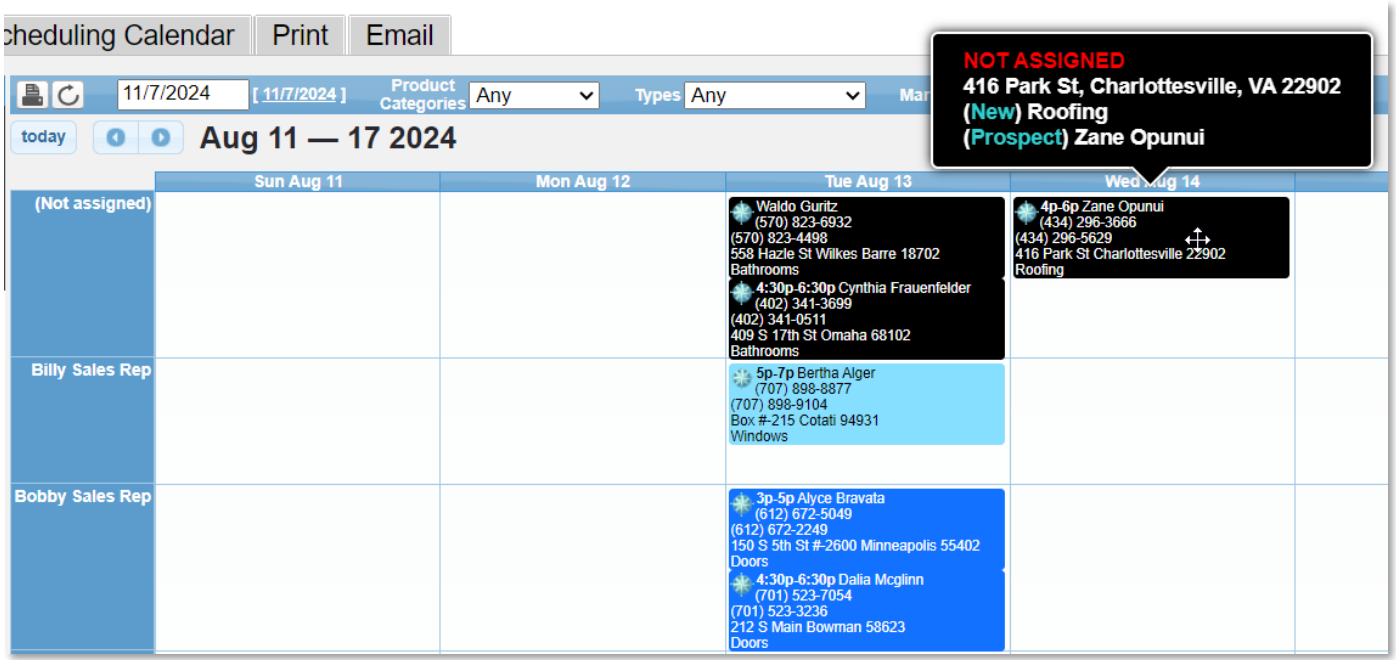
- Display Staff in Rows, grouping each Staff member's events together
- Scroll down to see more Staff
- Use Staff Filters to reduce number of Rows displayed



Staff Calendar Drag and Drop

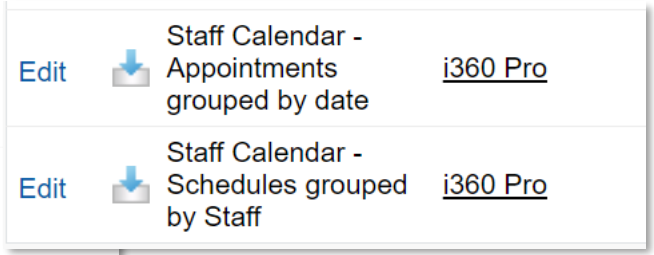
All Unassigned Appointments at the top in Black
Quickly Assign by dragging and dropping

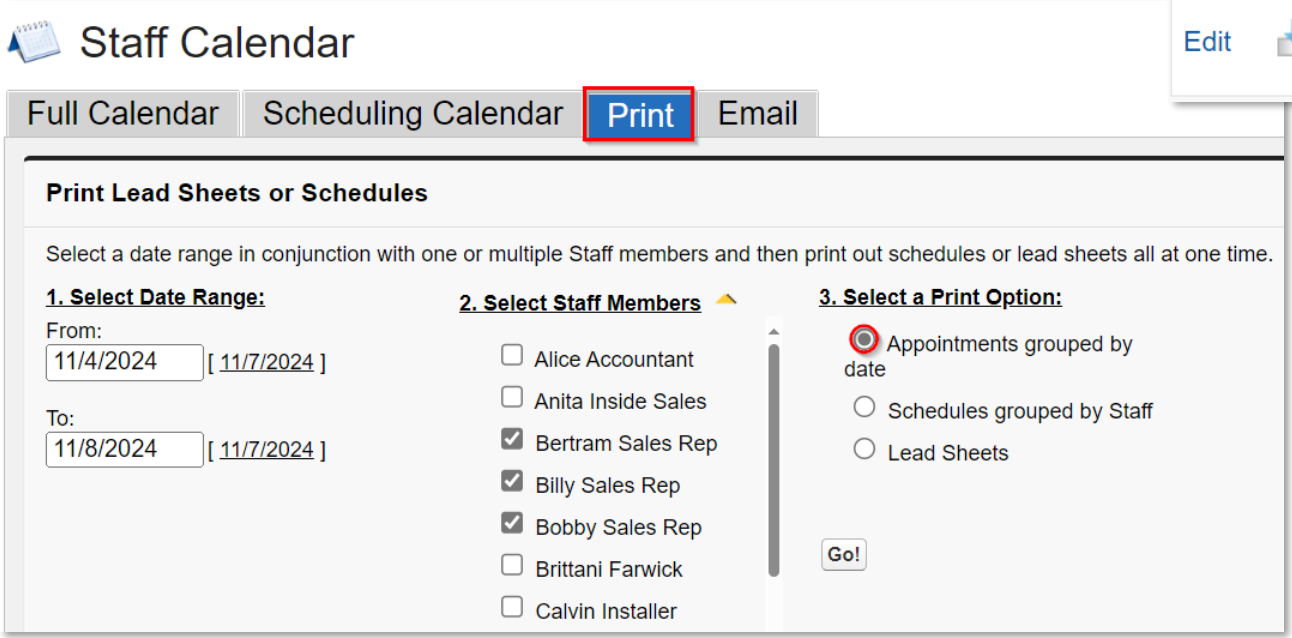
Set View to week by View



Staff Calendar Print and Email

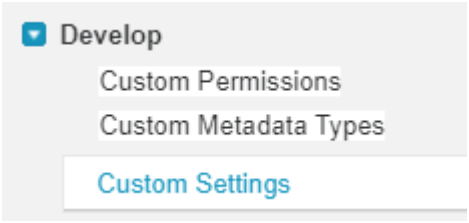
- Select Date Range
- Choose which Staff members
- Select what you want to Print/Email





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:

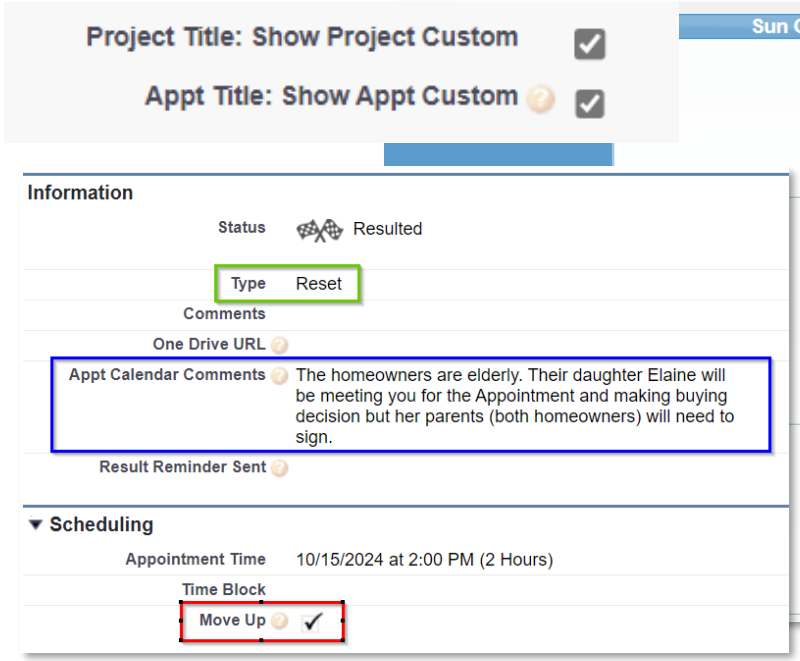
Project Activity Calendar Fields:
Address
City
Job Type (Product Category)
Phone
Prospect
Zip Code
Custom Calendar Text

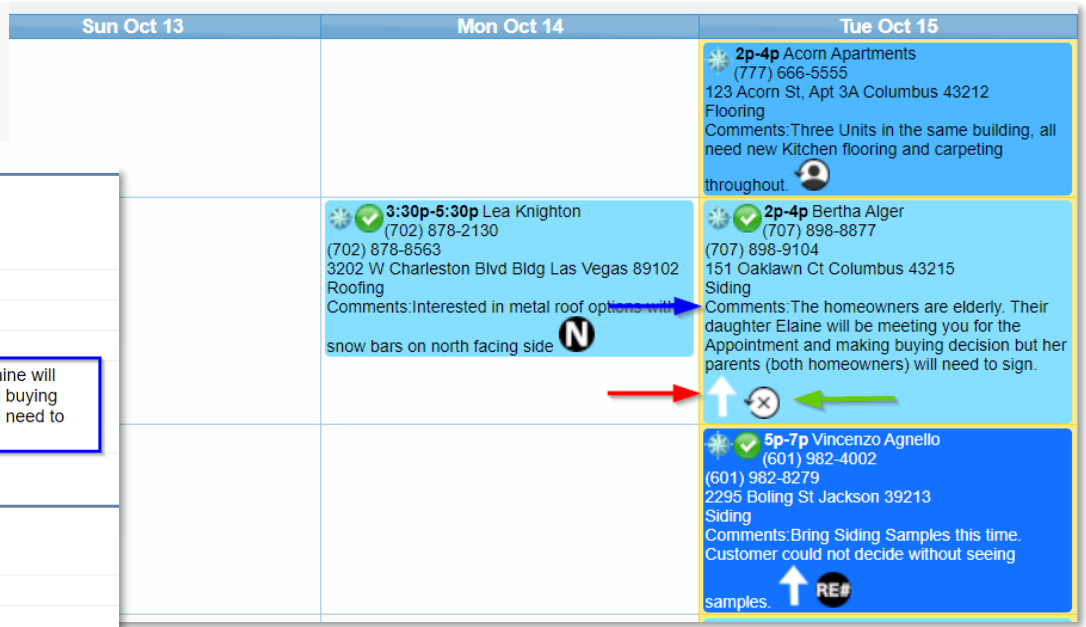
Appointment Calendar Fields:
Address
City
Phone
Prospect
Zip Code
Distance to Next Appointment
Custom Calendar Text

Calendar Custom Text

Customization:
Starts at $500

Supports custom text fields and small custom icons or images:





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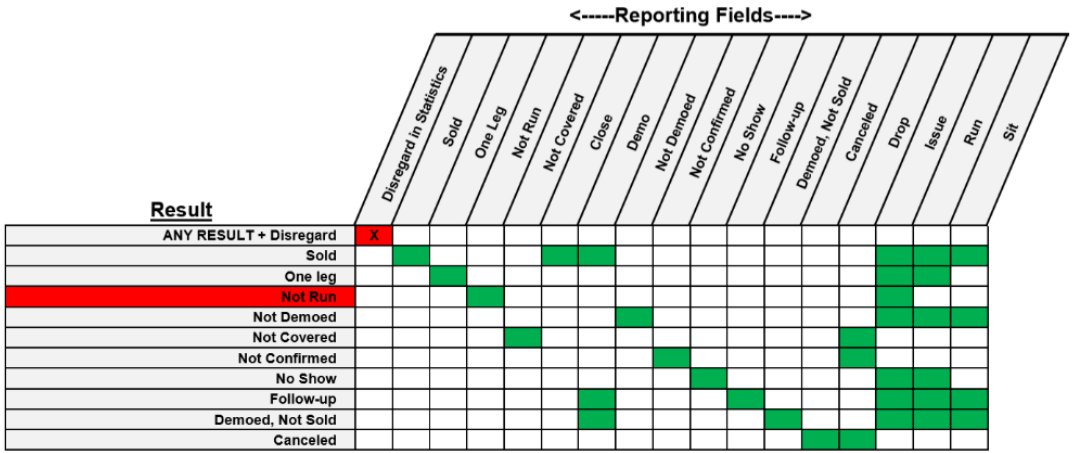
Appointment Report “Count” Fields



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

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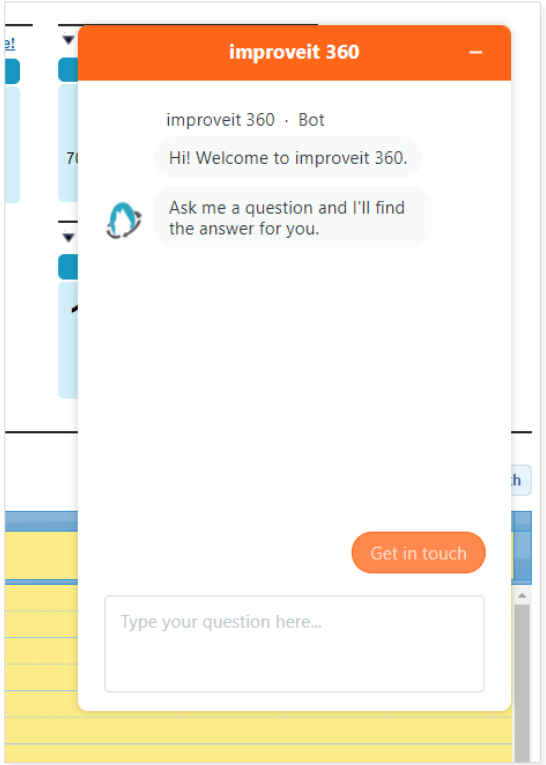
2. Open a Ticket at: https://support.improveit360.com/
3. Or Email Us: support@improveit360.com

Support Office Hours:

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



Thanks for Attending

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