improveit 360 Appointment Result Report Fields* Process Flow

Flowchart elements:

- **New Lead Source** → Marketing Opportunity to Set Appt → Fresh Leads
- **Set Appointment?** — Yes → Appointment → Set = 1
  - No → (loops back)
- **Assign the Sales Rep** → Assigned = 1
- **Confirm Appointment** → Confirmed = 1
- **Canceled?** — No → Issued?
  - Yes → Result = Canceled → Marketing Opportunity to Reset → Reset Call Campaign
- **Issued?** — Yes → Run?
  - No → Result = Not Covered, Not Confirmed or Canceled → Marketing Opportunity to Reset
- **Run?** — Yes → Sold?
  - No → Result = Not Run → Marketing Opportunity to Reset
- **Sold?** — Yes → Sale is Auto-Created
  - Yes → Result = Sold Close = 1 Sold = 1
  - No → Result = No Show, Not Demoed, Follow-Up, Demoed Not Sold
    - No Show → Marketing Opportunity to Reset
    - Follow-Up → Marketing Opportunity to Follow-Up → Follow-Up Call Campaign
    - Demoed Not Sold → Marketing Opportunity to ReHash → ReHash Call Campaign
- **Sale is Auto-Created** → Deposit Collected? — Yes → Receipts & Adjustements
- **Approved?** — Yes → Create Project
  - No → Manage Sale
- **Create Project** → Final Payment → Project Completed — Yes → Sale Status is changed to Final
- **Marketing Opportunity to ReMarket** → Previous Customer Call Campaign → Existing Database

Campaigns: Reset Call Campaign, ReHash Call Campaign, Follow-Up Call Campaign, Previous Customer Call Campaign

Relationship Legend

Shape	Meaning
Yellow	Process
Light purple/pink	Report Field*
Green	Campaign
Blue	Marketing Opportunity
Red	Key Object

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* For more information on Result Reporting Fields visit:
https://support.improveit360.com/