

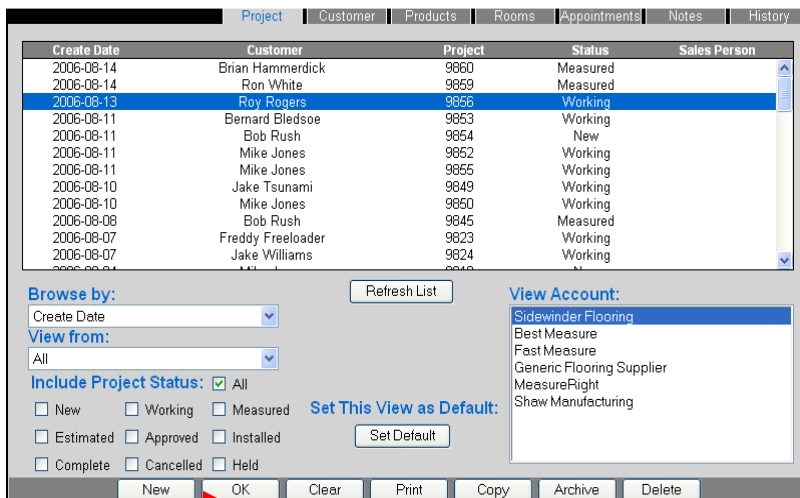
Training Lesson: Appointments, Set Appointments (Administrator Access Only) Revision: 092506-01

This feature allows the user to set new appointments, or edit existing ones. This lesson will also describe the procedure for viewing active or cancelled appointments.

After logging on to the system, click the “Project Center” navigation button.



You will navigate to the following screen :



In order to set an appointment, the project name must appear in the list above. Create a new project or highlight the name of the project you want to set an appointment for, and then click the “OK” button.

Project Name: ROAR Status: Working

Project Number: 9855 Sales Person: Not Assigned

Retail Order Number:

Company Name: Sidewinder Flooring Contact: Randy Kelley

Phone: 336-377-3800 Fax: N/A

Measure Type: Measure - 8/31/2006

Measure PO: Contact: Randy Kelley

Vendor Name: Sidewinder Flooring Phone: 336-377-3800

Measurer: Norm Carter Fax: N/A

Install Type: No install appointments

Install PO: Contact:

Vendor Name: Phone:

Installer: Fax:

You can make any necessary changes to the project information, then open the appointments window by clicking the **“Appointments”** tab

Type	Date	Start Time	Length	PO Number	Assigned To	Apt. Status	Confirmation
Measure	8/24/2006	6:45 AM	1 Hrs. 15 Mins.	123	Charlie Caparella	Active	Unconfirmed

Click **“Add / Edit Appointments”**

Appointments History

Appointments

View Current Appointments ▼

Type	Date	Start Time	Length	Assigned By	Assigned To	Apt. Status	Confirmation
Measure	8/24/2006	8:15 AM	0 Hrs. 45 Mins.	John Petrel	Norm Carter	Active	Unconfirmed
Measure	8/31/2006	6:00 AM	0 Hrs. 45 Mins.	John Petrel	Norm Carter	Active	Unconfirmed

Sales Person:

Company Name: Sidewinder Flooring

Administrative Contact: Randy Kelley

Work Phone ▼ 336-377-3800

Measurer/Installer:

▼

Customer Name: Mike Jones

Work Phone ▼

Appointment PO Number:

Appointment Status: Active ▼

Appointment Confirmation: Unconfirmed ▼

Has Furniture: No

Appointment Notes:

New Update Edit

Ensure that you are viewing the list of current appointments

In this example, multiple appointments are set for the same project. When this occurs, each appointment will be shown in the list above. You can select an existing appointment and click **"Edit"** or create a new appointment by clicking the **"New"** button.

Next, you will be prompted to specify the type of appointment to be set. This is done by selecting the appropriate appointment type from the pull down menu.

Appointments History

Appointments

Mike Jones

Select Appointment Type ▼

- Select Appointment Type
- Measure
- Install - Carpet
- Install - Wood

Back

Appointments History

Appointments

Appointment Type: Company:

This Month 2006

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
					1 Zip Match	2 Zip Match
3	4 Zip Match	5 Zip Match	6 Zip Match	7	8 Zip Match	9 Zip Match
10	11 Zip Match	12 Zip Match	13 Zip Match	14	15 Zip Match	16 Zip Match
17	18 Zip Match	19 Zip Match	20 Zip Match	21	22 Zip Match	23 Zip Match
24	25 Zip Match	26 Zip Match	27 Zip Match	28	29 Zip Match	30 Zip Match

Appointment will fit
 Appointment will fit within 15 minutes
 Appointment will not fit
 Completely Booked
 No one scheduled to work
 Selected appointment

Zip Match: At least one person is working in the customer's area

The calendar displayed on your screen shows the current availability of appointment times. The scheduling application relies upon several factors to determine availability :

- Currently scheduled appointments
- Average length of time required to complete the specified service. This is determined using the established parameters for the size of the job and the capabilities of assigned personnel.
- Availability of personnel due to their established normal work schedules. This factor includes non-routine time off and also makes an accommodation for scheduling cutoff times.

To set a new appointment, click on a green or yellow color-coded day. You will see the following screen :

Zip Match : If the words “**Zip Match**” appear on a calendar day, at least one person is working in the customer’s area.

Appointments History

Appointments

Customer Information	Appointment Information																																																																																																
1284 Lock Rd. Dalton, Georgia 30721 Home: Room Count: 2 Work: Cell:	Company: All Companies Confirmation: Unconfirmed Assigned To: Date: Friday, August 25, 2006 <div style="text-align: right;"> <input type="button" value="Decrease Appointment Length"/> <input type="button" value="Increase Appointment Length"/> </div>																																																																																																
Best Measure Peter Jennings Georgia Work: 706-223-6678 Cell: 706-112-3345 Job Count: 0 Est. Apt. Length: 75 Minutes <input type="button" value="Quick Assign"/>	<table border="1" style="width: 100%; border-collapse: collapse; text-align: center;"> <tr> <td>12:00 - 12:15 AM</td><td>12:15 - 12:30 AM</td><td>12:30 - 12:45 AM</td><td>12:45 - 1:00 AM</td><td>1:00 - 1:15 AM</td><td>1:15 - 1:30 AM</td><td>1:30 - 1:45 AM</td><td>1:45 - 2:00 AM</td> </tr> <tr> <td>2:00 - 2:15 AM</td><td>2:15 - 2:30 AM</td><td>2:30 - 2:45 AM</td><td>2:45 - 3:00 AM</td><td>3:00 - 3:15 AM</td><td>3:15 - 3:30 AM</td><td>3:30 - 3:45 AM</td><td>3:45 - 4:00 AM</td> </tr> <tr> <td>4:00 - 4:15 AM</td><td>4:15 - 4:30 AM</td><td>4:30 - 4:45 AM</td><td>4:45 - 5:00 AM</td><td>5:00 - 5:15 AM</td><td>5:15 - 5:30 AM</td><td>5:30 - 5:45 AM</td><td>5:45 - 6:00 AM</td> </tr> <tr> <td>6:00 - 6:15 AM</td><td>6:15 - 6:30 AM</td><td>6:30 - 6:45 AM</td><td>6:45 - 7:00 AM</td><td>7:00 - 7:15 AM</td><td>7:15 - 7:30 AM</td><td>7:30 - 7:45 AM</td><td>7:45 - 8:00 AM</td> </tr> <tr style="background-color: #e0ffe0;"> <td>8:00 - 8:15 AM</td><td>8:15 - 8:30 AM</td><td>8:30 - 8:45 AM</td><td>8:45 - 9:00 AM</td><td>9:00 - 9:15 AM</td><td>9:15 - 9:30 AM</td><td>9:30 - 9:45 AM</td><td>9:45 - 10:00 AM</td> </tr> <tr> <td>10:00 - 10:15 AM</td><td>10:15 - 10:30 AM</td><td>10:30 - 10:45 AM</td><td>10:45 - 11:00 AM</td><td>11:00 - 11:15 AM</td><td>11:15 - 11:30 AM</td><td>11:30 - 11:45 AM</td><td>11:45 - 12:00 PM</td> </tr> <tr> <td>12:00 - 12:15 PM</td><td>12:15 - 12:30 PM</td><td>12:30 - 12:45 PM</td><td>12:45 - 1:00 PM</td><td>1:00 - 1:15 PM</td><td>1:15 - 1:30 PM</td><td>1:30 - 1:45 PM</td><td>1:45 - 2:00 PM</td> </tr> <tr> <td>2:00 - 2:15 PM</td><td>2:15 - 2:30 PM</td><td>2:30 - 2:45 PM</td><td>2:45 - 3:00 PM</td><td>3:00 - 3:15 PM</td><td>3:15 - 3:30 PM</td><td>3:30 - 3:45 PM</td><td>3:45 - 4:00 PM</td> </tr> <tr style="background-color: #e0ffe0;"> <td>4:00 - 4:15 PM</td><td>4:15 - 4:30 PM</td><td>4:30 - 4:45 PM</td><td>4:45 - 5:00 PM</td><td>5:00 - 5:15 PM</td><td>5:15 - 5:30 PM</td><td>5:30 - 5:45 PM</td><td>5:45 - 6:00 PM</td> </tr> <tr> <td>6:00 - 6:15 PM</td><td>6:15 - 6:30 PM</td><td>6:30 - 6:45 PM</td><td>6:45 - 7:00 PM</td><td>7:00 - 7:15 PM</td><td>7:15 - 7:30 PM</td><td>7:30 - 7:45 PM</td><td>7:45 - 8:00 PM</td> </tr> <tr> <td>8:00 - 8:15 PM</td><td>8:15 - 8:30 PM</td><td>8:30 - 8:45 PM</td><td>8:45 - 9:00 PM</td><td>9:00 - 9:15 PM</td><td>9:15 - 9:30 PM</td><td>9:30 - 9:45 PM</td><td>9:45 - 10:00 PM</td> </tr> <tr> <td>10:00 - 10:15 PM</td><td>10:15 - 10:30 PM</td><td>10:30 - 10:45 PM</td><td>10:45 - 11:00 PM</td><td>11:00 - 11:15 PM</td><td>11:15 - 11:30 PM</td><td>11:30 - 11:45 PM</td><td>11:45 - 11:59 PM</td> </tr> </table>	12:00 - 12:15 AM	12:15 - 12:30 AM	12:30 - 12:45 AM	12:45 - 1:00 AM	1:00 - 1:15 AM	1:15 - 1:30 AM	1:30 - 1:45 AM	1:45 - 2:00 AM	2:00 - 2:15 AM	2:15 - 2:30 AM	2:30 - 2:45 AM	2:45 - 3:00 AM	3:00 - 3:15 AM	3:15 - 3:30 AM	3:30 - 3:45 AM	3:45 - 4:00 AM	4:00 - 4:15 AM	4:15 - 4:30 AM	4:30 - 4:45 AM	4:45 - 5:00 AM	5:00 - 5:15 AM	5:15 - 5:30 AM	5:30 - 5:45 AM	5:45 - 6:00 AM	6:00 - 6:15 AM	6:15 - 6:30 AM	6:30 - 6:45 AM	6:45 - 7:00 AM	7:00 - 7:15 AM	7:15 - 7:30 AM	7:30 - 7:45 AM	7:45 - 8:00 AM	8:00 - 8:15 AM	8:15 - 8:30 AM	8:30 - 8:45 AM	8:45 - 9:00 AM	9:00 - 9:15 AM	9:15 - 9:30 AM	9:30 - 9:45 AM	9:45 - 10:00 AM	10:00 - 10:15 AM	10:15 - 10:30 AM	10:30 - 10:45 AM	10:45 - 11:00 AM	11:00 - 11:15 AM	11:15 - 11:30 AM	11:30 - 11:45 AM	11:45 - 12:00 PM	12:00 - 12:15 PM	12:15 - 12:30 PM	12:30 - 12:45 PM	12:45 - 1:00 PM	1:00 - 1:15 PM	1:15 - 1:30 PM	1:30 - 1:45 PM	1:45 - 2:00 PM	2:00 - 2:15 PM	2:15 - 2:30 PM	2:30 - 2:45 PM	2:45 - 3:00 PM	3:00 - 3:15 PM	3:15 - 3:30 PM	3:30 - 3:45 PM	3:45 - 4:00 PM	4:00 - 4:15 PM	4:15 - 4:30 PM	4:30 - 4:45 PM	4:45 - 5:00 PM	5:00 - 5:15 PM	5:15 - 5:30 PM	5:30 - 5:45 PM	5:45 - 6:00 PM	6:00 - 6:15 PM	6:15 - 6:30 PM	6:30 - 6:45 PM	6:45 - 7:00 PM	7:00 - 7:15 PM	7:15 - 7:30 PM	7:30 - 7:45 PM	7:45 - 8:00 PM	8:00 - 8:15 PM	8:15 - 8:30 PM	8:30 - 8:45 PM	8:45 - 9:00 PM	9:00 - 9:15 PM	9:15 - 9:30 PM	9:30 - 9:45 PM	9:45 - 10:00 PM	10:00 - 10:15 PM	10:15 - 10:30 PM	10:30 - 10:45 PM	10:45 - 11:00 PM	11:00 - 11:15 PM	11:15 - 11:30 PM	11:30 - 11:45 PM	11:45 - 11:59 PM
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<input checked="" type="checkbox"/> Appointment will fit <input type="checkbox"/> Appointment will fit within 15 minutes <input type="checkbox"/> Appointment will not fit <input type="checkbox"/> Other appointments <input type="checkbox"/> Time off																																																																																																	
<input type="button" value="Back"/> <input type="button" value="Add"/>																																																																																																	

Information and features you should be aware of before scheduling the appointment :

- FloorWizard calculates the time required for an appointment based on the size of the job and the time it takes the assigned personnel to complete services. If the appointment type is an installation, FloorWizard automatically adds time to the appointment length to account for the removal of furniture. This time will often vary between personnel and is displayed in the gray area to the left of the time chart.
- FloorWizard uses three factors to determine the displayed order of measuring personnel, in order of greatest to least importance:
 1. Whether or not the person is assigned to the same zip code that the job occurs in.
 2. Whether or not the person is associated with the company who owns the job.
 3. Personnel with the fewest scheduled appointments for the day.
- A person's name appears in green if they are assigned to the same zip code that the job occurs in. Permission is required to assign the appointment to a person who is not working in the customer's area. When you assign the appointment, you will see a dialog box indicating whether or not you have this permission. If you do not, contact your administrator to change "**Person Parameters.**"

- The confirmation status bar indicates whether or not the customer has been contacted and informed of their scheduled appointment.

Procedure for scheduling an appointment:

1. Select the company of the personnel, or select “**All Companies**” to view all available people.
2. View the daily schedules of the specified company’s personnel by advancing the list with the scroll bar.
3. Decide when you would like the appointment to begin from the available colored time periods. Click the desired starting time to assign the appointment. You can also use the quick assign feature at this time. Quick Assign will use logic to choose the best available time period for the intended personnel. Permission is required to assign an appointment which violates the person’s established cutoff time, or scheduling buffer to prevent overbooking. When you assign an appointment that violates the person’s cutoff time, you will see a dialog box indicating whether or not you have this permission. If you do not, contact your administrator to change “**Person Parameters.**”
4. Click the “**Add**” button.

** If necessary, you can increase or decrease the appointment length using the buttons above the time chart. This is especially useful if you know, in advance, that the appointment will be longer or shorter than FloorWizard’s prediction.

Understanding color coding :

- **Green** : The appointment will fit in the time period.
- **Yellow** : The time period is 15 minutes too short to accommodate the appointment. If Necessary, the appointment can be scheduled for this time. Scheduling the appointment in a yellow time period will result in the overlap of adjacent time periods.
- **Red** : The time period is at least 30 minutes too short to accommodate the appointment.
- **Blue** : Other appointments have been scheduled and the time period is completely booked. Without rescheduling, no appointments will fit.
- **Gray** : The person is not working based on their normal work schedule. This can also indicate non-routine time off.

Type	Date	Start Time	Length	Assigned By	Assigned To	Apt. Status	Confirmation
Measure	8/24/2006	6:45 AM	1 Hrs. 15 Mins.	John Petrel	Charlie Caparella	Active	Unconfirmed

Sales Person:	
Company Name: Sidewinder Flooring	
Administrative Contact: Randy Kelley	
Work Phone: 336-377-3800	
Measurer/Installer: Charlie Caparella	
Work Phone: 513-737-3700	
Customer Name: Mike Jones	
Work Phone:	

Appointment PO Number: 123
Appointment Status: Active
Appointment Confirmation: Unconfirmed
Has Furniture: No
Appointment Notes: Ferocious dog in front yard

New Update Edit

To update an existing appointment :

1. Some information can be easily changed from this screen by using the pull down menus or information fields.
2. Make necessary adjustments, and click the **“Update”** button.
3. ****** To change project or customer information about the appointment, revisit the project center. If you would like to reschedule or reassign the appointment, see the following page.

Appointments | History

Appointments

[View Current Appointments](#) ▼

Type	Date	Start Time	Length	Assigned By	Assigned To	Apt. Status	Confirmation
Measure	8/24/2006	6:45 AM	1 Hrs. 15 Mins.	John Petrel	Charlie Caparella	Active	Unconfirmed

Sales Person:

Company Name: Sidewinder Flooring

Administrative Contact: Randy Kelley

Work Phone: 336-377-3800

Measurer/Installer: Charlie Caparella

Work Phone: 513-737-3700

Customer Name: Mike Jones

Work Phone:

Appointment PO Number: 123

Appointment Status: Active

Appointment Confirmation: Unconfirmed

Has Furniture: No

Appointment Notes: Ferocious dog in front yard

To edit an existing appointment :

1. Highlight the appointment you want to edit.
2. Click the **“Edit”** button.
3. From this point, the procedure is the same as setting a new appointment. Make the necessary changes and click the **“Update”** button.

Appointments

Customer Information

1515 Abutment Rd
Dalton, Georgia 30721

Home: Room Count: 0

Work:

Cell:

Appointment Information

Company: All Companies

Confirmation: Unconfirmed

Assigned To: Charlie Caparella of Sidewinder Flooring

Date: Thursday, August 24, 2006, 6:45 AM - 7:30 AM

Sidewinder Flooring	12:00 - 12:15 AM	12:15 - 12:30 AM	12:30 - 12:45 AM	12:45 - 1:00 AM	1:00 - 1:15 AM	1:15 - 1:30 AM	1:30 - 1:45 AM	1:45 - 2:00 AM
	2:00 - 2:15 AM	2:15 - 2:30 AM	2:30 - 2:45 AM	2:45 - 3:00 AM	3:00 - 3:15 AM	3:15 - 3:30 AM	3:30 - 3:45 AM	3:45 - 4:00 AM
Charlie Caparella	4:00 - 4:15 AM	4:15 - 4:30 AM	4:30 - 4:45 AM	4:45 - 5:00 AM	5:00 - 5:15 AM	5:15 - 5:30 AM	5:30 - 5:45 AM	5:45 - 6:00 AM
	6:00 - 6:15 AM	6:15 - 6:30 AM	6:30 - 6:45 AM	6:45 - 7:00 AM	7:00 - 7:15 AM	7:15 - 7:30 AM	7:30 - 7:45 AM	7:45 - 8:00 AM
Nevada	8:00 - 8:15 AM	8:15 - 8:30 AM	8:30 - 8:45 AM	8:45 - 9:00 AM	9:00 - 9:15 AM	9:15 - 9:30 AM	9:30 - 9:45 AM	9:45 - 10:00 AM
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Work: 513-737-3700	12:00 - 12:15 PM	12:15 - 12:30 PM	12:30 - 12:45 PM	12:45 - 1:00 PM	1:00 - 1:15 PM	1:15 - 1:30 PM	1:30 - 1:45 PM	1:45 - 2:00 PM
	2:00 - 2:15 PM	2:15 - 2:30 PM	2:30 - 2:45 PM	2:45 - 3:00 PM	3:00 - 3:15 PM	3:15 - 3:30 PM	3:30 - 3:45 PM	3:45 - 4:00 PM
Cell: 513-571-6171	4:00 - 4:15 PM	4:15 - 4:30 PM	4:30 - 4:45 PM	4:45 - 5:00 PM	5:00 - 5:15 PM	5:15 - 5:30 PM	5:30 - 5:45 PM	5:45 - 6:00 PM
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Job Count: 1	8:00 - 8:15 PM	8:15 - 8:30 PM	8:30 - 8:45 PM	8:45 - 9:00 PM	9:00 - 9:15 PM	9:15 - 9:30 PM	9:30 - 9:45 PM	9:45 - 10:00 PM
	10:00 - 10:15 PM	10:15 - 10:30 PM	10:30 - 10:45 PM	10:45 - 11:00 PM	11:00 - 11:15 PM	11:15 - 11:30 PM	11:30 - 11:45 PM	11:45 - 11:59 PM

Est. Apt. Length: 75 Minutes

Appointment will fit
 Appointment will fit within 15 minutes
 Appointment will not fit
 Other appointments
 Time off

To view current or cancelled appointments :

Use the pull down menu to highlight the desired appointment status.

Account Id: 9 Project Id: 9852

Appointments History

Appointments

Type	Date	Start Time	Length	Assigned By	Assigned To	Canceled
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View Cancelled Appointments
View Current Appointments
View Cancelled Appointments

Sales Person:

Company Name: Sidewinder Flooring
Administrative Contact: Randy Kelley
Work Phone: 336-377-3800

Measurer/Installer:
Work Phone:

Customer Name: Mike Jones
Work Phone:

Appointment PO Number:
Appointment Status: Active
Appointment Confirmation: Unconfirmed
Has Furniture: No
Appointment Notes:

New Update Edit

Back Home Logoff