Working with Appointments

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Introduction

To help you assign, track, and record calls and appointments with customers, The Edge offers an appointment module. The primary purpose of this module is to allow you and your staff to create tasks that involve making contact with a customer to discuss potential sales, service jobs, and other business-generating conversations. This is not to be confused with clienteling and other broad marketing modules found in The Edge; it is designed to manage specific interaction with the customer for a specific objective.

Appointments are found in the **Associate** function of The Edge main screen. There are three primary functions within the appointment module:

- Add Appointment
- Find and Edit an Appointment
- Bring Up the Next Appointment.

This document will also discuss working with appointments at point of sale and the new **Appointments** tab in the **Customer Edit** window.

System Options

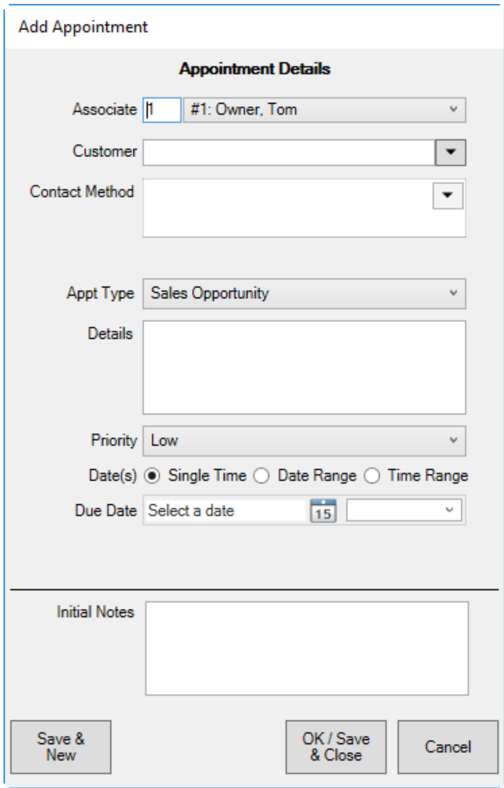
There are three new **System Options** that relate to appointments.

How to Notify Associates of New Appointment	Whether to send a notification to an associate of an assigned appointment and, if so, whether it should be by text or email. The phone number or email address will be taken from the associate record.
Number of Next Up Records Listed	As you'll see later in this document, you can pull up a list of appointments to address. This setting allows you to change the default number presented.
Send Daily Email of Upcoming Appointments	Whether to send a daily email to associates informing them of appointments they have for the day. It will use the email address in the associate's record.

Adding an Appointment

To create a new appointment:

1. Select **Associate ► Appointments ► Add**. The **Add Appointment** window will appear.



Fields and options in the **Add Appointment** window include:

Associate

Offers the **Associate** drop-down menu; use it to assign the task or appointment to an associate.

Customer

Offers the customer find filter to indicate the customer. This is required to proceed with further contact information.

Contact Method

Offers the method contact window:

- `Phone`
- `Email`
- `In Person`.

For each contact type, there may be more than one contact method. Select the correct phone number email address, or store location.

Appointment Type

Allows you to categorize appointments by type:

- `Registry`
- `Service`
- `Wish List`
- `Sales Opportunity`.

Details

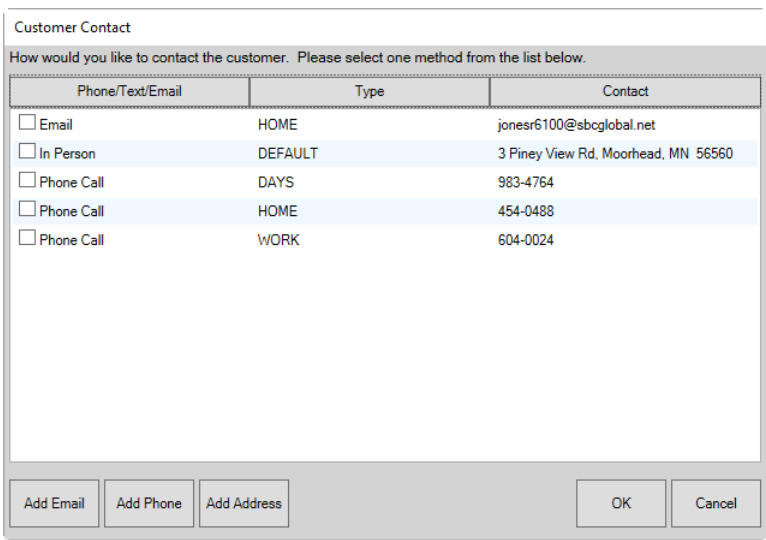
Allows you to record details about the task. It should be a succinct description of the task as it will appear in the list view.

Priority

Indicates the priority of the contact on a scale of `High`, `Medium`, or `Low`.

Dates	You have the option to enter a specific, single time to fulfill the appointment, enter a date range, or enter a time range on a particular date. The options for entering those details change according which radio button you select: • **Single Time**: Select a date from the date picker and select a time in 30-minute intervals from the drop-down menu. • **Date Range**: **Begin Date** and **End Date** fields will be offered; select accordingly. No time frame is recorded, but The Edge will store the time as 12:00 a.m. • **Time Range**: Begin and end dates will be offered, but you can also pick times.
Initial Notes	Notes concerning the purpose of the contact, information about items or transactions to be discussed, etc. There is space to be detailed here; you can include item numbers, descriptions, etc. This information will not appear in the **History** area of the appointment record.

2. Select an associate.
3. Select a customer.
4. Select the **Contact Method** drop-down menu. The **Customer Contact** window will appear.



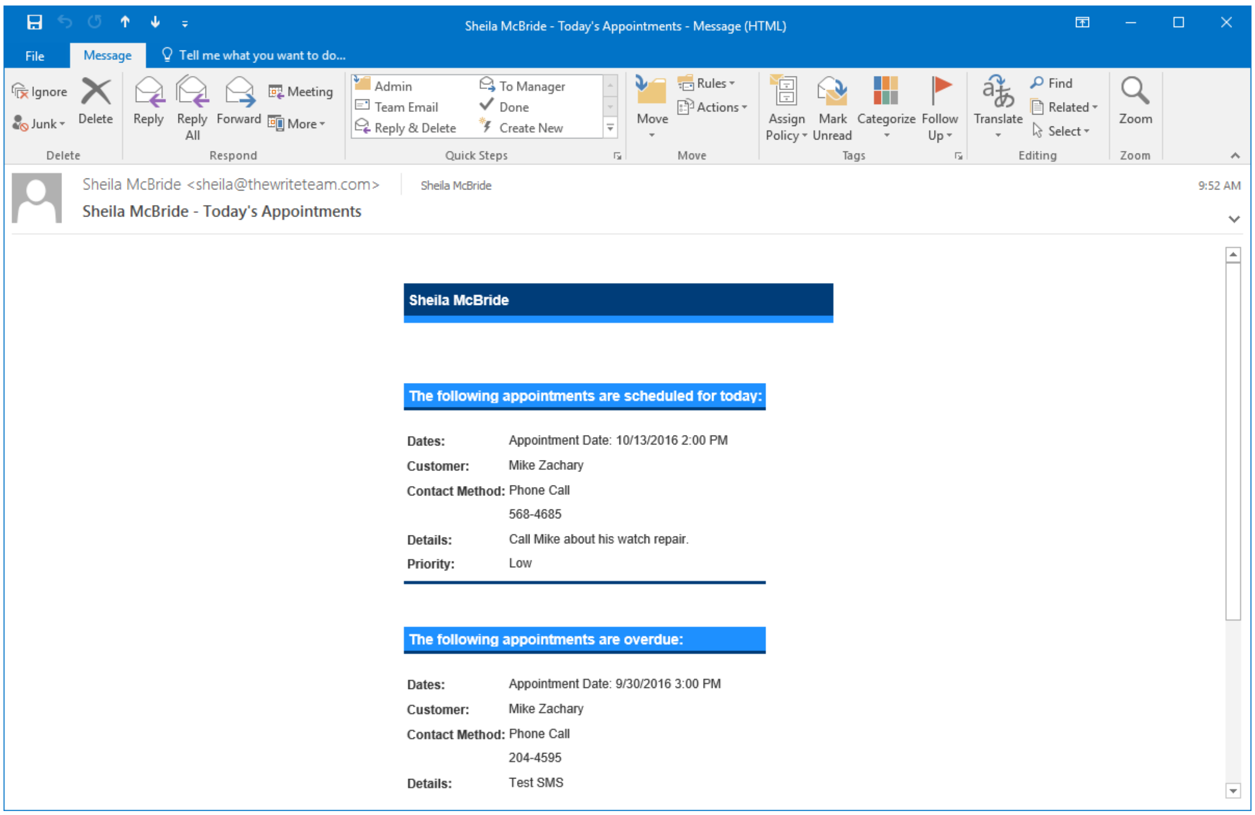
5. Select the type of contact with the desired value from the available options.
6. Select **OK**. You will be returned to the **Add Appointment** window. The **Contact Method** and **Contact Address** will be populated.
7. Complete the remaining fields and select **OK/Save & Close**. The appointment will be saved and the window will close.
8. When you are ready to act on the appointment, find it as described in the section entitled Finding an Appointment.

Appointment Notifications

Depending on **System Options** and associate contact information, the associate to whom the appointment is assigned will receive an email or text message informing him or her of the assignment. For example, if you're a manager, you can set appointments for associates. Then, when the appointment is set, an email or text message can be sent to the associate. In addition, a daily email can be sent to associates listing the day's appointments.

Text Sample

Email Sample

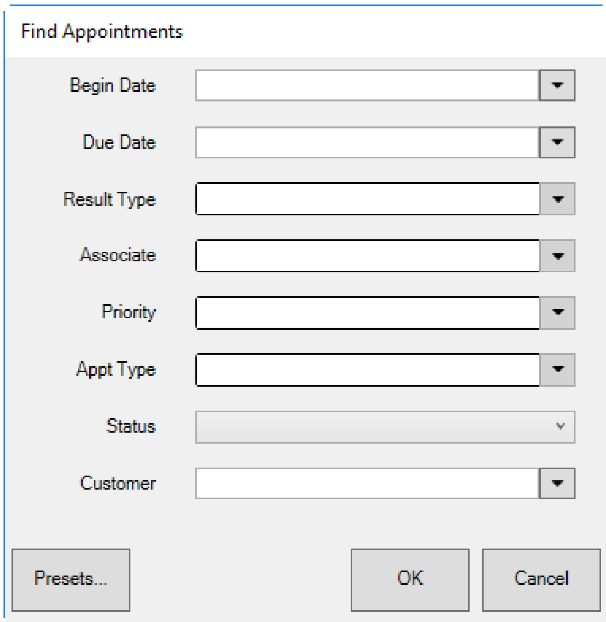


For these notifications to work, you must have text messaging and email set up in The Edge. For instructions, see the section in The Edge User Guide entitled Notifications (http://docs.edgeuser.com/NetHelp/index.html#!Documents/notifications.htm).

Finding and Editing an Appointment

To work with or fulfill and appointment:

1. Select **Associate** ▶ **Appointments** ▶ **Find**. The **Find Appointments** window will appear.



Filter options in the **Find Appointments** window include:

Begin Date Returns appointments with the selected begin date.

End Date Returns appointments with the selected end date.

Result Type Returns appointments based on result type:

- `All`
- `Contact Unsuccessful, Try Again Later`
- `Made Contact, Need Follow-Up`
- `Made Sale, Set New Opportunity`
- `Did Not Make Sale, Set New Opportunity`
- `Discontinue`
- `Data Changed`
- `Initial Note`.

Associate Returns appointments assigned to the selected associate. If none are selected, it will default to the currently logged-in associate.

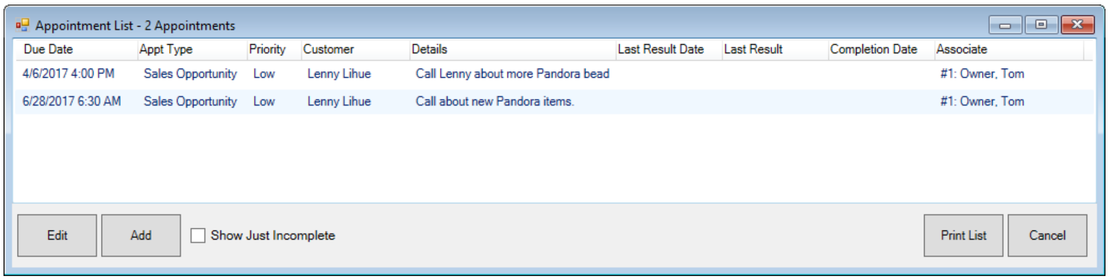
Priority Returns appointment with the selected priority: `High`, `Medium`, or `Low`.

Appt Type Returns appointments based on type:

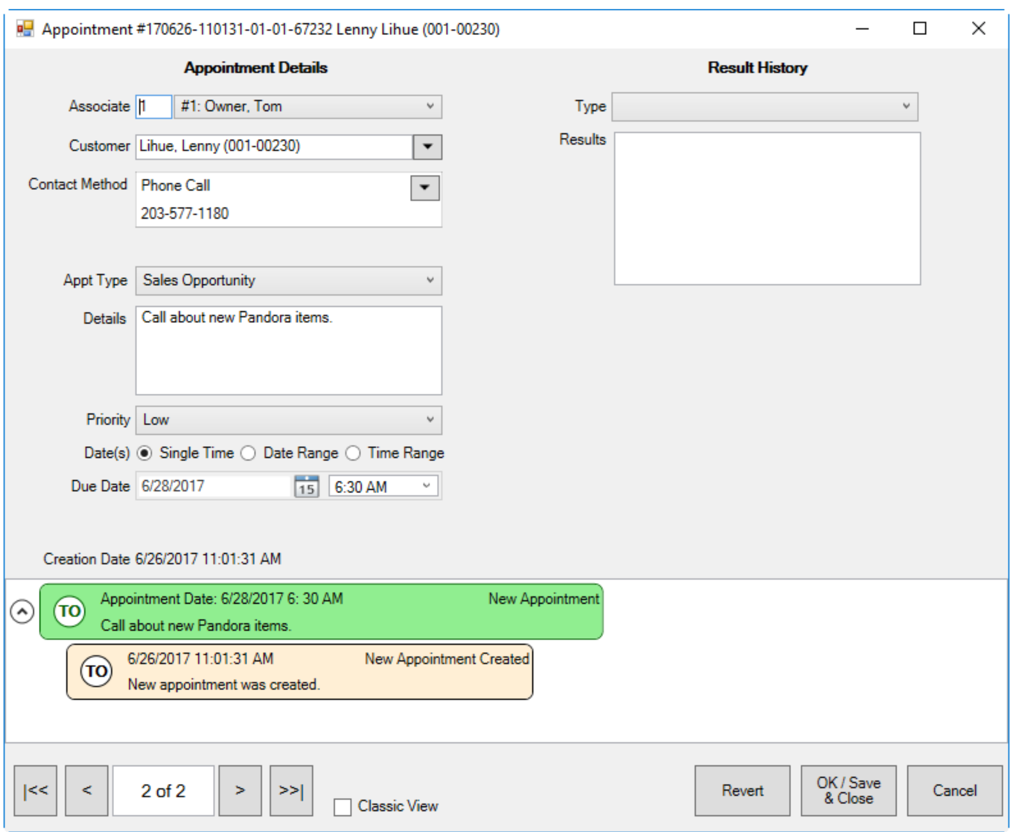
- `Registry`
- `Service`
- `Wish List`
- `Sales Opportunity`.

Status	Returns appointments with the selected status: • `All Appointments` • `Completed Appointments Only` • `Not Completed Appointments Only.`
Customer	Returns appointments with the selected customer.

2. Enter values in the filter to narrow results and select **OK**. The **Appointment List** window will appear.



3. Select the appointment with which you wish to work and double-click or select **Edit**. The **Edit Appointment** window will open. In addition, the **Customer Edit** window will open for easy reference and to allow you to take notes.



The left side of the **Edit Appointment** window contains the data provided when the appointment was created. The right side of the **Edit Appointment** window contains fields for recording activity:

Type — The type of result:

- `Contact Unsuccessful, Try Again Later`. You should make notes in the appointment and change the dates as needed.
- `Made Contact, Need Follow-Up`. You should make notes in the appointment. A prompt for the follow up call within the appointment will appear.
- `Made Sale, Set New Opportunity`. The Edge will close the current appointment and prompt you to create a new appointment for the future.
- `Did Not Make Sale, Set New Opportunity`. The Edge will close the current appointment and prompt you to create a new appointment for the future.
- `Discontinued`. The customer doesn't want to be contacted on this opportunity anymore; the chain will come to a close.

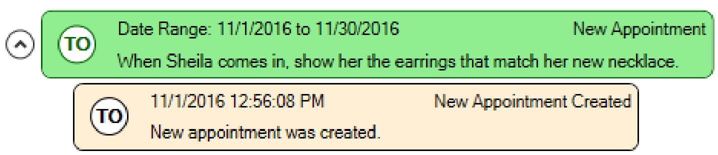
Results — Notes about the success of the appointment and what kind of follow up may be needed as described above.

4. Complete these fields and select a **Save** option. The newly recorded action will appear in the **History** area on the bottom of the window.

Working with Appointment Results

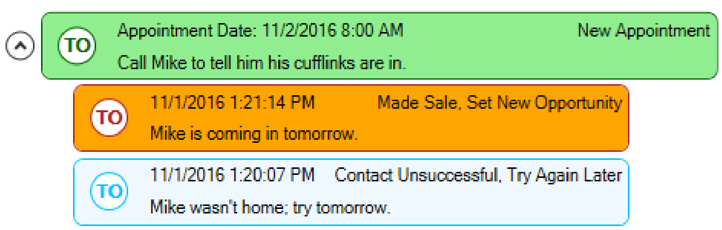
Example 1: Initial Appointment

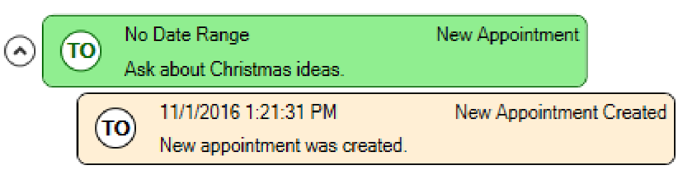
Here is an initial appointment record in which we want to call a customer and tell her about an item she might want.



Example 2: Completed Appointment with New Opportunity

When the appointment is complete, you can record the results and the appointment will be closed. If the appointment is closed, either successfully or unsuccessfully, you will want to keep the conversation going, so The Edge will prompt you to make a new appointment in a new chain, closing the previous chain.

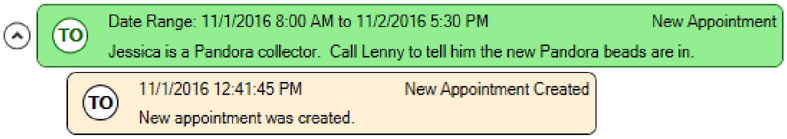




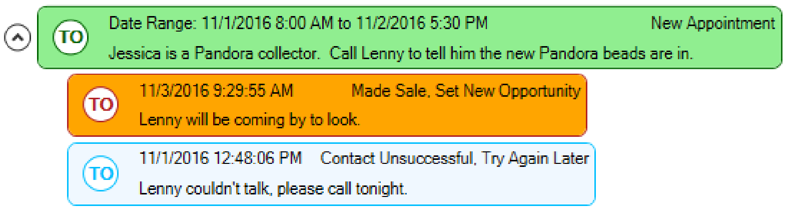
The **Appointment** list view will show the new appointment and the results of the first.

Example 3: Appointment Requires a Follow-Up Call

Suppose you try to fulfill the appointment, but the person is unavailable or unable to talk at that time. You will want to record your actions and set a follow up time. In the case of a follow-up, the history window will show the next action appointment in the same chain. Here is the initial appointment.



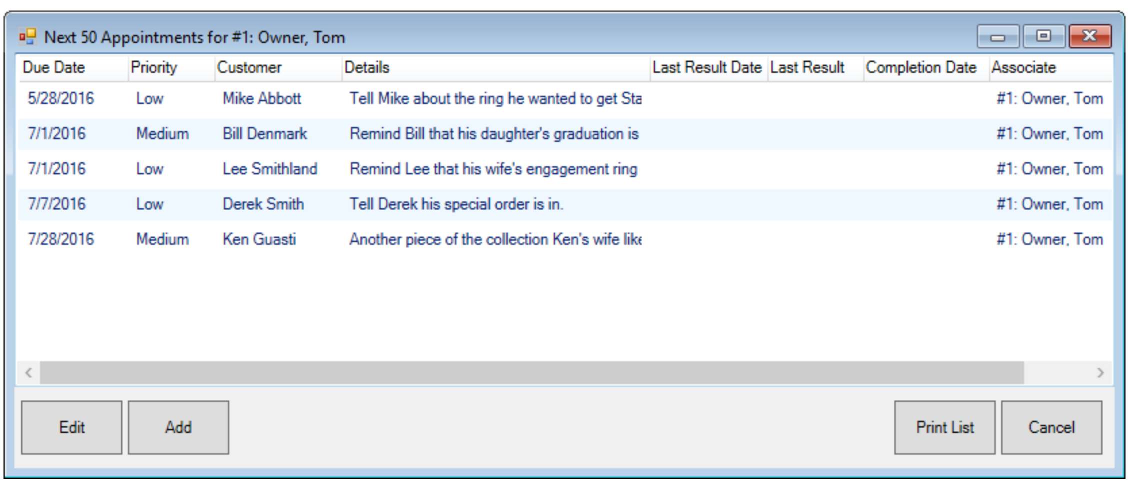
Here it is with the follow-up.



Working the Next Appointment

When it's time to work the appointment list, use the **Next 50 Open** option to return a list of upcoming appointments in order. The number of next appointments to list can be changed in System Options. To obtain the Next 50 Open list:

1. Select **Associate ► Appointments ► Next 50 Open**. The **Next 50 Appointments** window will appear with the current user's appointment list of up to as many appointments as are set in **System Options**.

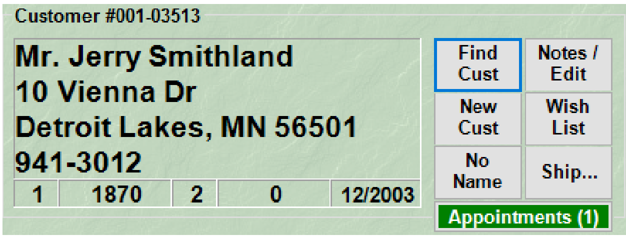


Due Date	Priority	Customer	Details	Last Result Date	Last Result	Completion Date	Associate
5/28/2016	Low	Mike Abbott	Tell Mike about the ring he wanted to get Sta				#1: Owner, Tom
7/1/2016	Medium	Bill Denmark	Remind Bill that his daughter's graduation is				#1: Owner, Tom
7/1/2016	Low	Lee Smithland	Remind Lee that his wife's engagement ring				#1: Owner, Tom
7/7/2016	Low	Derek Smith	Tell Derek his special order is in.				#1: Owner, Tom
7/28/2016	Medium	Ken Guasti	Another piece of the collection Ken's wife like				#1: Owner, Tom

2. Select the record for the appointment with which you want to work and select **Edit**.
3. Work the appointment and record the results as described in the section entitled Finding and Editing an Appointment.

Appointment Features at POS

If a customer with open appointments comes into the store, when his record is brought up at Point of Sale, a green button will come up near his customer information. This allows you to act on the appointment right there.



To work with the appointment:

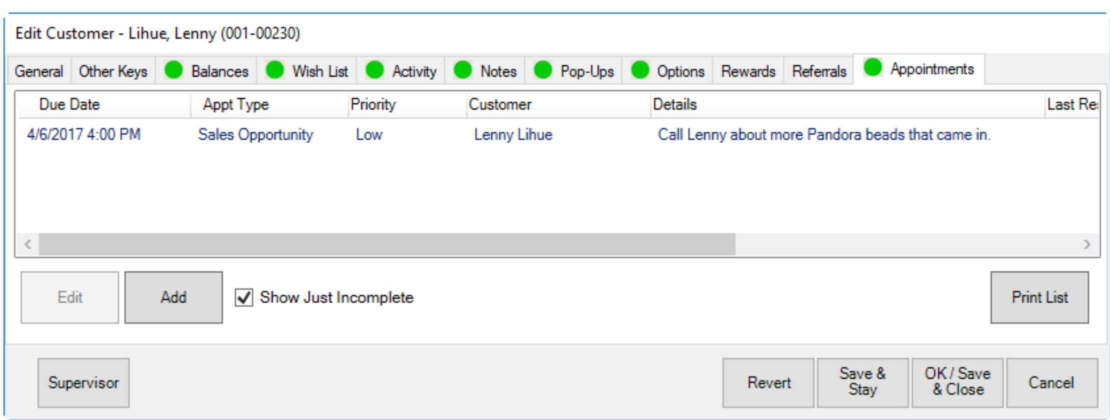
1. Select **Appointments**. The customer record will appear with the **Appointments** tab open.
2. Open the desired appointment record.
3. Make notes and indicate next action as described in the section entitled Finding and Editing an Appointment.
4. You can also add appointments from this window.

Customer Edit Appointments Tab

The **Customer Edit** window has an **Appointments** tab where you can work with appointments from the customer record in addition to the **Appointments** area.

To work with appointments from the **Customer Edit** window:

1. Perform a customer find and locate the record with which you wish to work.
2. Go to the **Appointments** tab. A list view will show existing appointments for the customer.



3. Select an appointment and select **Edit** or double-click it. The appointment will open as described in the section entitled Finding and Editing an Appointment.
4. Add an appointment by selecting **Add**. The **Add Appointment** window will open as described in the section entitled Adding an Appointment. Add the appointment as required.
5. Select **OK/Save & Close**.