Appointments Revamp

Overview

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With the introduction of customer **Opportunities**, the **Appointments** feature has been redesigned to function <u>only</u> as an appointment tracker, much like you would find in Microsoft Outlook or other software.

Previously, **Appointments** behaved as a hybrid of an appointment and a sales opportunity.

Working with Appointments

Appointments can be accessed from the following places:

Associate Menu

Point of Sale

	_						
Associate 1	Sales, Billy (1)	~	Share				
Customer #001-4	3686						
Dominick Ma	stri			Find	Notes /		•
13 Colony St				Cust	Edit	Cor acts	Орро
Seymour, C1				New			
203-500-6000				Cust	Wish List	Appts (1)	Quotes
	ail.com						

Customer Record

🖳 Edit C	Custome	er - Mastri, D	ominick (0	01-43686)						
General	Sizing	Other Keys	Balances	Wish List	Merchandise	Activity	Notes	Options	Appointment	ts
Gener	-	Prir	mary		Spouse/Partn	er				
	ID #	001-43686			oposourian	-		Method	Туре	w
C	Gender			~		~		_		
	Title							C	Cell	Domini
	First	Dominick						\bigcirc	Cell_1	Domini
	Middle							ĭ	Home	Domini
	Last I	Mastri						\bullet	nome	Domini

> Opportunities

	Appointment: Gift	3 Corporate	Dr, Shelton,	CT 06484						10/12/2022 1:11 PM
<u>ر</u>	Phone: (203) Customer caller i would pick sor	d to inquire ab				his niece, adv	ised we had a	a nice selectio	n in stock and	10/12/2022 1:08 PM
Close	Contact	Email	Note	(Ö) Item	H Wish	Spo	Quote	Task	Appt	\$ as POS + Wish

> Calendar

POS	Customer	Clientele	Inventory	Services	Reports	Dashboards	Associate	Cale	ndar	News	1
									`		

Adding an Appointment

To add an appointment:

1. Click Associates > Appointments > Add. The Add a new Appointment window will appear.

Add a new Appointm	nent					
(P) Billy Sales (1)	Notify Email Any Associate Associate					
	Customer Non-Custo	omer				
Customer*		යි	Notify			Ŧ
Contact Method*						
Subject*						
Date*	Enter date	÷	Start Time*	Enter time)	
			End Time	Enter time		
Details						
					Save / Close	Cancel

- 2. Use the drop-down in the top left to select one or more **Associates** or click **Any Associate** if this appointment can be viewed and fulfilled by any associate in the store.
- 3. Optionally, use the **Notify** checkboxes at the top if you want the associate to receive an **Email** or **Text** with the appointment details.
- 4. Select whether this appointment is for a Customer or Non-Customer.
 - a. For **Customer** appointments, select the customer using the **Find Customer** button, then specify a **Contact Method**. Optionally, use the **Notify** drop-down if you want the customer to receive an **Email** or **Text** with the appointment details.

	Customer O Non-Custo	mer				
	Mastri, Dominick (001-43686)		දි	Notify	Text (203) 500-6000	•
Contact Method*	Address	3				
	3 Corporate Dr, Shelton, CT 06484					

b. For Non-Customer appointments, type in With Who and Location.

	Customer 🔘 Non-Customer
With Who*	Vendor ABC
Location*	Store

5. Enter a **Subject**, choose the **Date** and **Start Time** (**End Time** is optional), then enter any additional information into the **Details** field.

Subject*	Coming to look at a watch	h					
Date*	11/15/2022	÷.	Start Time* 1	0:00 AM 🕒			
			End Time	inter time 🕒			
Details	We have a watch the cust	omer is intere:	sted in trying on				
					Save / Close	Cancel	

6. Click **Save / Close** to save the appointment.

Finding and Editing

To Find and Edit an appointment:

1. Click Associates > Appointments > Find. The Find Appointments window will appear.

Find Appointments			
	Find Appointme	ents	
Date			-
Associates			-
Customer			•
Completed	Doesn't Matter		•
Cancelled	Not Cancelled		•
Presets		Find	Cancel

- 2. Enter desired criteria and click **Find**. A list of matching appointments will appear.
- 3. Select the appointment you wish to work with and click **Edit**. Alternatively, you can double click.
- 4. Make any desired changes, then click **Save/Close**.

Completing or Canceling

To complete an appointment:

- 1. Edit the appointment.
- 2. Enter Completion Notes, then click the Complete button in the top left.



Use the **Undo Complete** button in the lower left to open an appointment previously marked complete.

To cancel an appointment:

- 1. Edit the appointment.
- 2. Enter **Completion Notes**, then click **Cancel** in the top left.



NOTE

Use the **Undo Complete** button in the lower left to open an appointment previously marked cancelled.