

Appointment Plus

User Instructions

This document provides the user with instructions for the Appointment Plus System.

Appointment Plus System Features

- This is a tool for managing the following:
 - *Technician Work Force Management* – View appointments to determine whether the technician work schedule supports scheduled repairs
 - *Capacity Planning*
 - Cellairis agents set appointments based on open appointment times in Appointment Plus. The Store Location needs to add in-store set appointments to Appointment Plus. This will prevent double booking an appointment time by Cellairis agents.
 - Reserving Appointment Time Slots – The system has the ability to block out or reserve time slots. Use this option when a technician isn't available for repair appointments. This will prevent Cellairis agents from setting a repair appointment in the time slot.
 - *Parts Inventory* – Determine whether there is inventory to support repairs.
- *Logging Into System* – This is a web-based software. Logging into the system can be accomplished anywhere Internet connection is available. Multiple users can be logged in simultaneously.

Status Guidelines

- All appointments need to be reconciled at the end of every shift. There should be not appointments in the Scheduled or Confirmed Appointment Status.
- At the end of every shift each appointment should be in one of the following statuses:
 - Device Checked In
 - Completed Repair
 - Customer Picked Up Device
 - No Show

Appointment Status & Other Information

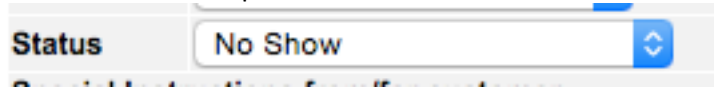
- *Updating Status*
 - Single Click on the appointment to open up the Appointment Details Box

The screenshot displays the Appointment Details Box with the following information:

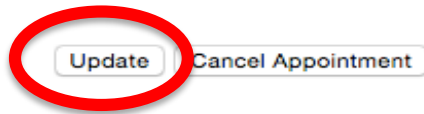
- Customer Information:** First Name: Elanore, Last Name: Gonzales, Address, City, State, Zip Code: 87114, Daytime Phone, Evening Phone, Cell Phone: (505) 897-..., Email: @gmail.com.
- Appointment Details:** With: Cottonwood Mall - Corp, Service: Digi, Add-on Services: iPhone 5c, Duration: 45 minutes, Date: Monday, October 12, 2015, Time: 12:00pm, Status: No Show.
- Special Instructions from/for customer:** screen replacement on iPhone 5c
- Appointment Notes (internal only):** black
- Actions:** Send change e-mail to staff member (checked), Send cancel e-mail to staff member (checked).
- Created By:** CSR Agent on 10/9/2015 at 12:56pm
- Last Update:** Cottonwood Mall - Corp on 10/12/2015 at 2:37pm
- This Update:** CSR Agent

Buttons: Update, Cancel Appointment

- Single Click on the Status Drop Box



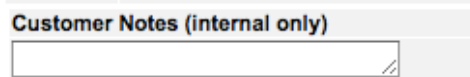
- Single Click on the appropriate status
- Single Click on the Update tab located in the upper right of the appointment details box



- "Appointment information has been updated" note will appear when the update is complete.

▪ **Adding Notes**

- The "Customer Notes (internal only)" box on the left side of the appointment details box is where notes need to be added about the appointment.
 - Single Click on the appointment to open up the Appointment Detail Box.
 - Click into the Customer Notes (Internal Only) box and enter notes



- Single Click the update button at the top right of the appointment details box.
- "Appointment information has been updated" note will appear when the update is complete.
- Close out of the appointment details box when the update is complete.

Adding Store Generated Appointments – Instructions

- Log into Appointment Plus
- Click on Appointment Tab (Located Upper Left)
- Double Click on the appointment time slot to open up Make Appointment Box



- Enter Customer Information:
 - First Name
 - Last Name
 - City
 - Zip Code
 - Best Contact Phone Number
 - Email

Customer Search	<input type="text"/>	Search
	Gann, Makena	
First Name	Makena	view
Last Name	Gann	
Address	<input type="text"/>	
City	<input type="text"/>	
State	<input type="text"/>	
Zip Code	30076	
Daytime Phone	<input type="text"/>	
Evening Phone	<input type="text"/>	
Cell Phone	111-111-1111	
Email	m.gann@ <input type="text"/>	

- Select Service drop down, select production
- Add On Service – Select the device for repair
- Click on date drop down and select date
- Click on time drop down and select time
- Click on status drop down and select appointment status
- Special Instructions for Customer – Add appropriate notes if applicable
- Appointment Notes (Internal Only) – Add appropriate notes if applicable

With	Shux - Buckhead ▾ view
Service	Digi ▾
Add-on Services	iPhone 4 ▾
Date	Wednesday, January 7, 2015 ▾
Time	12:00pm ▾
Status	Scheduled ▾
Special Instructions for Customer	
<input type="text" value="Black, ATT, \$49"/>	
Appointment Notes (internal only)	
<input type="text"/>	
Send appointment e-mail to customer <input checked="" type="checkbox"/>	
Send appointment e-mail to staff member <input checked="" type="checkbox"/>	
Created By	Shux - Buckhead ▾

- Click Finalize Appointment

Customer Search	<input type="text" value="Gann, Makena"/> <input type="button" value="Search"/>	With	Shux - Buckhead ▾ view
	Gann, Makena ▾	Service	Digi ▾
First Name	Makena view	Add-on Services	iPhone 4 ▾
Last Name	Gann <input type="button" value="⌵"/>	Date	Wednesday, January 7, 2015 ▾
Address	<input type="text"/>	Time	12:00pm ▾
City	<input type="text"/>	Status	Scheduled ▾
State	<input type="text"/>	Special Instructions for Customer	
Zip Code	30076	<input type="text" value="Black, ATT, \$49"/>	
Daytime Phone	<input type="text"/>	Appointment Notes (internal only)	
Evening Phone	<input type="text"/>	<input type="text"/>	
Cell Phone	111-111-1111	Send appointment e-mail to customer <input checked="" type="checkbox"/>	
Email	m.gann@ <input type="text"/> <input type="button" value="✉"/>	Send appointment e-mail to staff member <input checked="" type="checkbox"/>	
		Created By	Shux - Buckhead ▾
Customer Notes (internal only)			
<input type="text"/>			
<input type="button" value="Finalize Appointment"/>			

- Appointment has been added to the Appointment Plus schedule for your location.

Reserving Appointment Time Slots

- Single Click on the lightning bolt icon in the time slot

11 am	<input checked="" type="checkbox"/> ⚡
15	<input type="checkbox"/> ⚡
30	<input type="checkbox"/> ⚡
45	<input type="checkbox"/> ⚡

- An **X** will appear, the time slot will be shaded gray and Reserved will appear as the description



- Revising Description

- Single click on Reserved
- Opens Reserved Time Box
- Click in Reason box and type in description

Reason

- Click Update Reserve Time located at the bottom of the box

Reason

Time

Update Reserved Time

- “Reserved Time Has Been Updated” will appear

Reserved time has been updated

Reason This is where you type the reason

Time 10:00am to 11:00am

Edit Reserved Time

- Close out of the box, the reserved time has been updated.

- Revising Time

- Single click on Reserved
- Opens Reserved Time Box
- Choose the reserved from to reserved to time

Time

- Click Update Reserve Time located at the bottom of the box

Reason

Time

Update Reserved Time

- “Reserved Time Has Been Updated” will appear

Reserved time has been updated

Reason This is where you type the reason

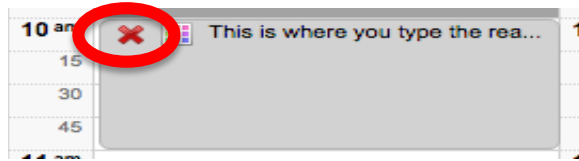
Time 10:00am to 11:00am

Edit Reserved Time

- Close out of the box, the reserved time has been updated.

- Deleting Reserved Time

- Click on the red X, the note “Are you sure you want to un-reserve this timeslot?” will appear, Click OK



- The screen will refresh and the reserved time will disappear.