Appointment Plus

User Instructions

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

Appointment Plus System Features

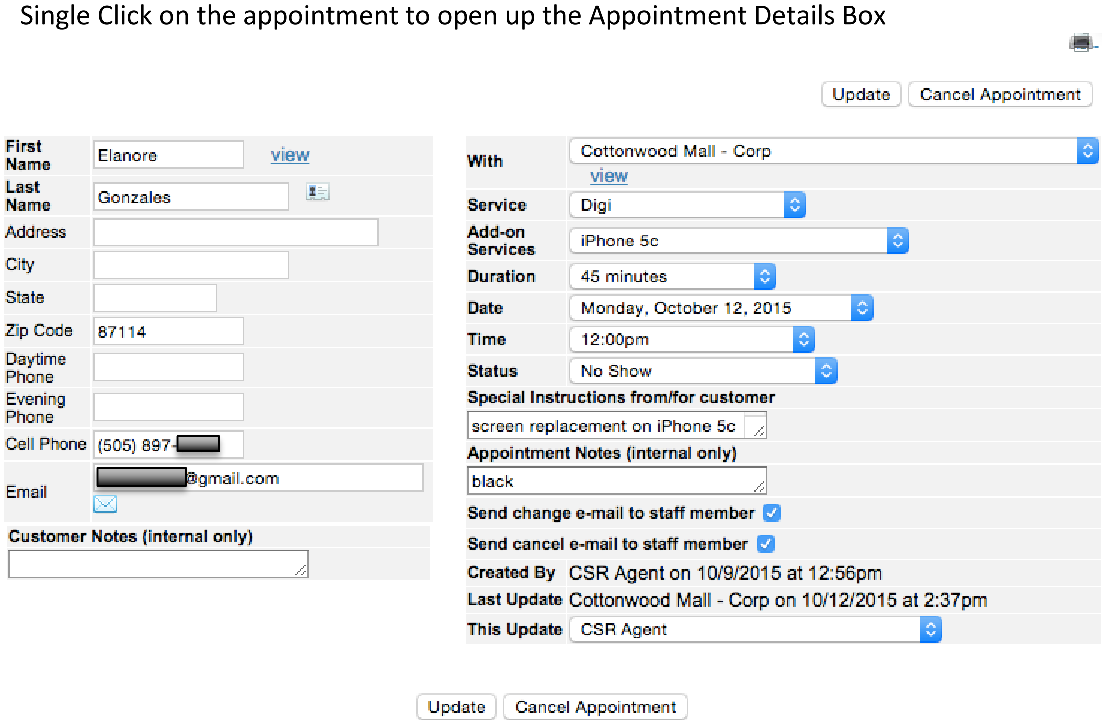
- This is a tool for managing the following:
  - *Technician Work Force Management* – View appointments to determine whether the technician work schedule supports scheduled repairs
  - *Capacity Planning*
    - Cellairis agents set appointments based on open appointment times in Appointment Plus. The 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

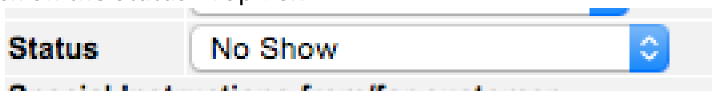
- All appointments need to be reconciled at the end of every shift. There should be not appointments in the Scheduled or Confirmed Appointment Status.
- At the end of every shift each appointment should be in one of the following statuses:
  - Device Checked In
  - Completed Repair
  - Customer Picked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

Appointment Status & Other Information

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



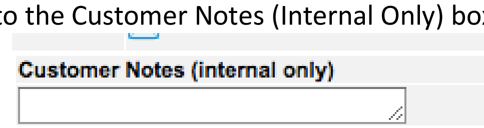
- Single Click on the Status Drop Box



- 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.

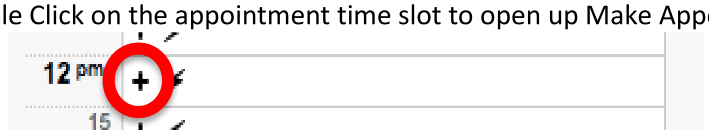
- ***Adding Notes***
  - The "Customer Notes (internal only)" box on the left side of the appointment details box is where notes need to be added about the appointment.
    - Single Click on the appointment to open up the Appointment Detail Box.
    - Click into the Customer Notes (Internal Only) box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



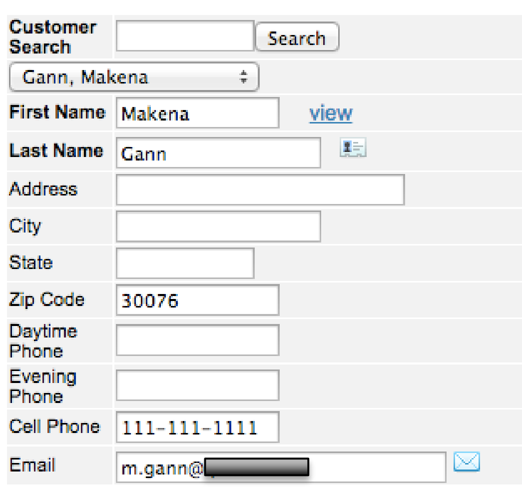
    - Single Click the update button at the top right of the appointment details box.
    - "Appointment information has been updated" note will appear when the update is complete.
    - Close out of the appointment details box when the update is complete.

Adding Store Generated Appointments – Instructions

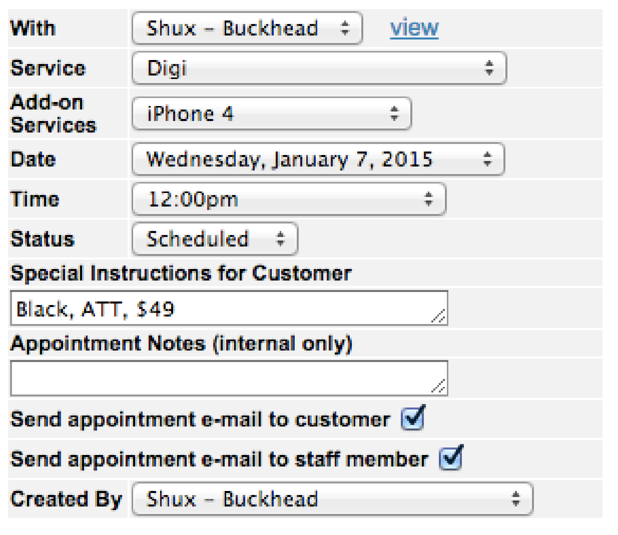
- Log into Appointment Plus
- Click on Appointment Tab (Located Upper Left)
- Double Click on the appointment time slot to open up Make Appointment Box



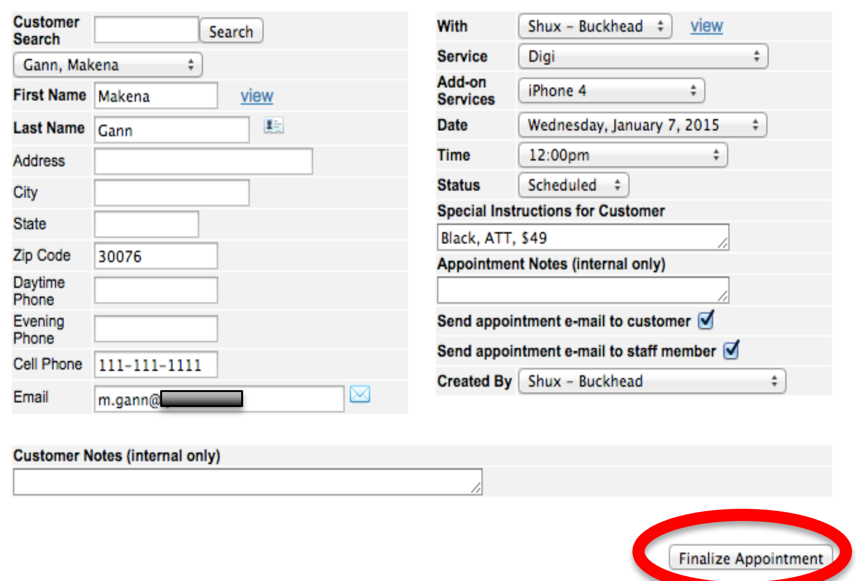
- Enter Customer Information:
  - First Name
  - Last Name
  - City
  - Zip Code
  - Best Contact Phone Number
  - Email



- 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



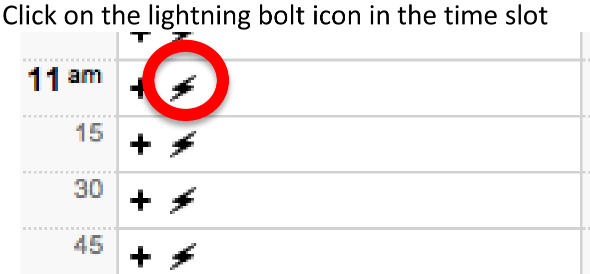
- Click Finalize Appointment



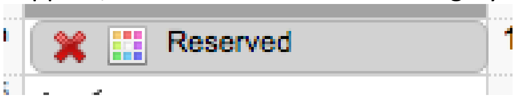
- Appointment has been added to the Appointment Plus schedule for your location.

Reserving Appointment Time Slots

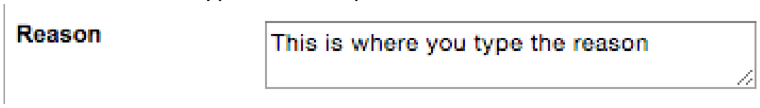
- Single Click on the lightning bolt icon in the time slot



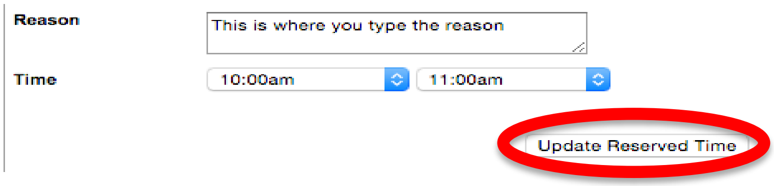
- An **X** will appear, the time slot will be shaded gray and Reserved will appear as the description



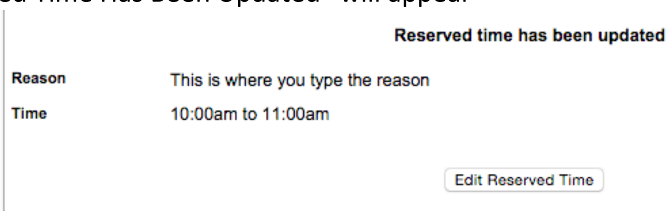
- Revising Description
    - Single click on Reserved
    - Opens Reserved Time Box
    - Click in Reason box and type in description



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

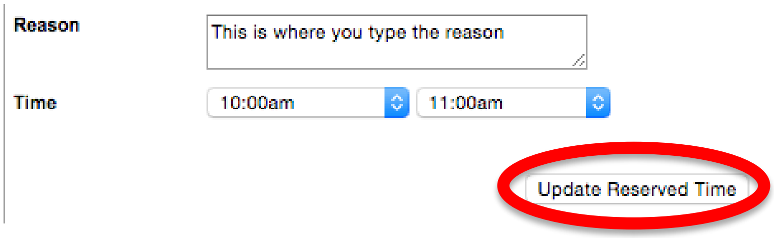


    - "Reserved Time Has Been Updated" will appear

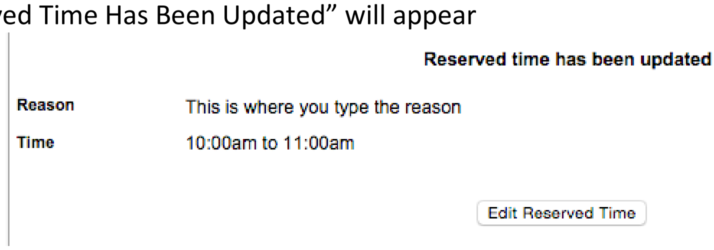


    - Close out of the box, the reserved time has been updated.
- Revising Time
    - Single click on Reserved
    - Opens Reserved Time Box
    - Choose the reserved from to reserved to time

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

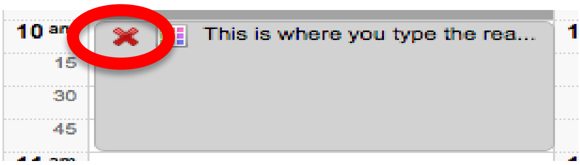


    - "Reserved Time Has Been Updated" will appear



    - 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.