



Feature Spotlight: Scheduling Manager Web Portal

Scheduling Manager's new **Web Portal** is an exciting new way for you, your employees and your customers to make appointments, view jobs and make payments.



The **Web Portal** assists you with organizing information. Customers can request appointments and pay invoices directly. Employees can mark jobs as completed, indicate availability, and make leave requests. You can view all requests by customers and employees to confirm appointments and requests.

Web Portal Availability Calendar

We make it possible for customers to view all the times you have available with the Availability Calendar. Your clients can see available times and schedule when teams are free.

Web Portal Customer Payments

We make receiving payments easy with the **Web Portal**. Once a job is complete and an invoice is created, customers have the option of paying with a credit card right through the **Web Portal**. The payment is transferred quickly and securely so you can close out invoices with minimal overhead and transaction costs.

Employee Web Portal Capabilities

Your employees will also have many options when accessing the **Web Portal**. As soon as employees log in, they can see their scheduled jobs for the day, complete jobs online, and make an availability schedule.

Web Portal Administrator Access

Administrators have access to all of the same features as customers, employees and can also send global messages to all customers to make announcements or to issue notices of service changes. The overview of all customer and employee data through the **Web Portal** gives administrators quick and easy access to all customer and employee data to make management decisions even easier. We designed the **Web Portal** as an easily accessible management tool for you to use to help run your business.



Active Customers Report

Many of our clients provide a regular service to paying customers weekly, bi-weekly, monthly, etc. You may know who they are but it can be difficult to gather information about all of them in one place. We make it easy to view active customers with recurring schedules. Once you set a customer's job frequency in the calendar, they will appear in this report. It's a quick way to see all of the customers who have regularly scheduled work.

First Name	Last Name	Address	City	State	Zip	Frequency	Start Date	Phone	Source
Lorraine	Aaronson	1784 East 10th St	Brooklyn	NY	11230	Select Days	05/30/2013	555-833-7948	YELLOW PAGES
Frederick	Douglas	672 9th St	Brooklyn	NY	11215	Select Days	11/02/2013	555-385-8958	Google
Jenny	Rutherford	1023 Coney Island	Brooklyn	NY	11230	Select Days	01/14/2013	347-312-6216	YELLOW PAGES
Marilyn	Abwood	1234 Mermaid Ave	Brooklyn	NY	11224	1-day	07/16/2013	718-355-3376	WEB SITE
Sammy	Adams	1022 Ocean Avenue	Brooklyn	NY	11226	Select Days	11/01/2013	347-445-0778	DAILYNEWS
Mary	Baker	357 Schermerhorn	Brooklyn	NY	11217	Select Days	07/18/2013	555-937-5029	DAILYNEWS
Michelle	Baldwin	1501 Smiths Lane	Brooklyn	NY	11236	Select Days	10/23/2013	555-385-8958	Google
Sarah	Bampton	2880 Ocean Avenue	Brooklyn	NY	11235	Select Days	07/18/2013	718-345-0789	REFERRAL
Maria	Sanchez	85-07 Queens Bou	Elmhurst	NY	11373	1-2wk	01/14/2013	(555) 917-1856	YELLOW PAGES
Fred	Baxter	123 Oak St	Brooklyn	NY	11222	Select Days	12/13/2013	555-385-8958	DAILYNEWS

These valuable customers provide a regular income to your business, so having the list of your best customers can provide valuable insight about your marketing efforts and customer satisfaction. You can call, send out survey through our email feature, or speak to these customer to find out exactly what their needs are so you can market those services to a wider population, providing your company with more reliable income. You'll find this new report under "Reports", then "Customers", "Customer Summary Reports", and "Active Customer Report (Schedules)".

Automatic Address Changes

Many of our clients' customers have only one address where they need work. If that's the case for your business, we offer the option to update the address of the Work Location whenever their Billing Information changes.

Prompt to add Phone Log entry when clearing reminders?

Source Code Required?

Default Value for "Allow Sending Auto Emails" for Customers

Automatically update the Location Address if Billing Address changes?
(Note: This will only apply if there is only 1 location for the Customer)

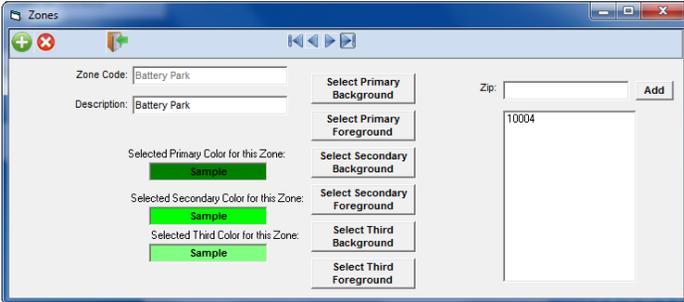
Enable Email Verification

A simple check in the box shown above will automatically sync the Billing and Location addresses for any customer with one location, eliminating double entry. We take every opportunity we can to reduce inefficiency and make running your business easier.

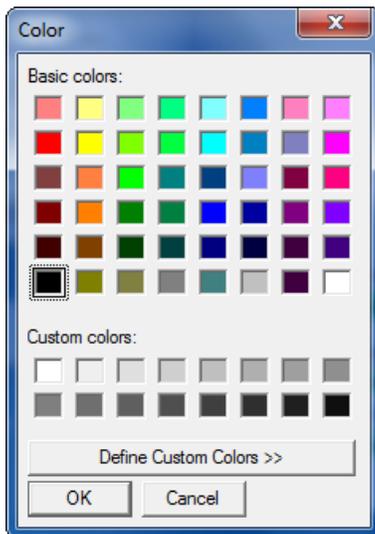
Call now to learn more about your Web Portal options!

How To: Set and Color Zones

Scheduling Manager offers the ability to make Zones based on your own geographic preferences. The most popular and practical is setting Zones based on ZIP Codes.

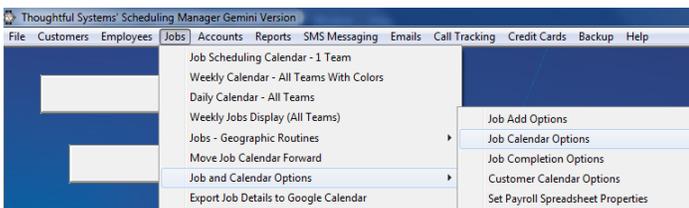


When creating a new zone, you can set the Zone Code to any name you like. Neighborhood names are popular and can help create an easy visualization for anyone doing the scheduling.

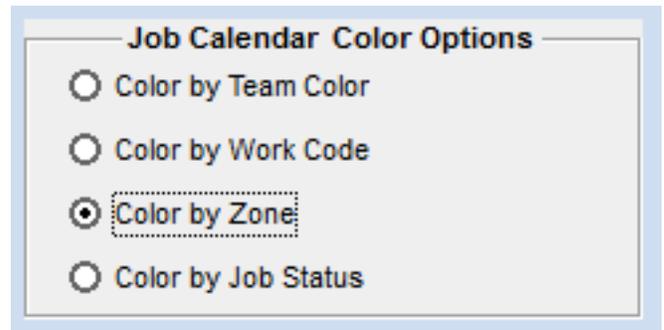


Zone colors also help users recognize where a job is at a glance and can help with assigning jobs to teams or deciding the best time for a job to be scheduled. We offer a popular selection of colors by default and offer color customization with RGB color codes. You can change the background color that displays on the calendar and you can change font color.

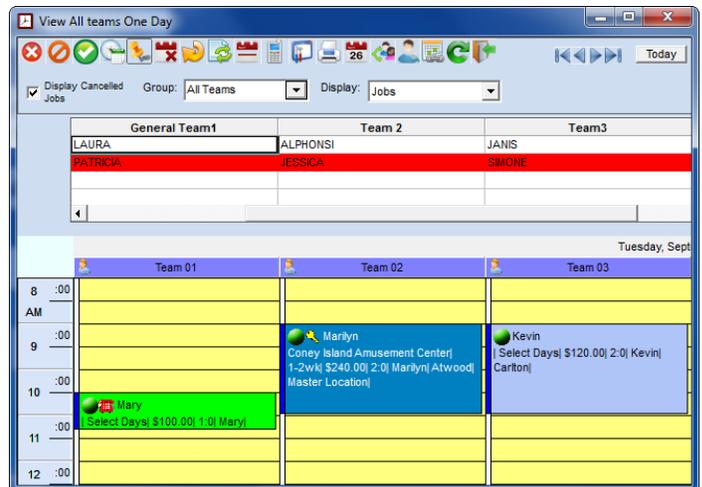
To show the jobs colored by Zone on the job calendar, go to "Jobs" on the menu bar, then "Job and Calendar Options". From there select "Job Calendar Options".



Once you click on "Job Calendar Options", you'll see a variety of customizable features for your job calendars. In this case we're searching for "Job Calendar Color Options", which will display a list of choices to color based on your needs. You can also quickly switch between the choices to help you visualize each job's status.



Once you set the options, you'll see them displayed on the calendar screen. All customer jobs will be colored based on the Zone they're in and the color you selected.



This makes it very easy to see all of your jobs separated by zone. You can describe the Zones however you like and set customer profiles to certain zones. We've added an extremely convenient feature that can automatically assign zones to customers. If you decide to set zones by ZIP code, whenever you add a new customer with an address in that ZIP code, they'll automatically be assigned to that zone!

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