This feature allows the user to set new appointments, or edit existing ones. This lesson will also describe the procedure for viewing active or cancelled appointments.

After logging on to the system, click the “Project Center” navigation button.

You will navigate to the following screen:

In order to set an appointment, the project name must appear in the list above. Create a new project or highlight the name of the project you want to set an appointment for, and then click the “OK” button.
You can make any necessary changes to the project information, then open the appointments window by clicking the “**Appointments**” tab

**Click “Add / Edit Appointments”**
Ensure that you are viewing the list of current appointments

In this example, multiple appointments are set for the same project. When this occurs, each appointment will be shown in the list above. You can select an existing appointment and click “Edit” or create a new appointment by clicking the “New” button.

Next, you will be prompted to specify the type of appointment to be set. This is done by selecting the appropriate appointment type from the pull down menu.
The calendar displayed on your screen shows the current availability of appointment times. The scheduling application relies upon several factors to determine availability:

- **Currently scheduled appointments**
- **Average length of time required to complete the specified service.** This is determined using the established parameters for the size of the job and the capabilities of assigned personnel.
- **Availability of personnel due to their established normal work schedules.** This factor includes non-routine time off and also makes an accommodation for scheduling cutoff times.

To set a new appointment, click on a green or yellow color-coded day. You will see the following screen:

**Zip Match**: If the words “Zip Match” appear on a calendar day, at least one person is working in the customer’s area.
Information and features you should be aware of before scheduling the appointment:

- FloorWizard calculates the time required for an appointment based on the size of the job and the time it takes the assigned personnel to complete services. If the appointment type is an installation, FloorWizard automatically adds time to the appointment length to account for the removal of furniture. This time will often vary between personnel and is displayed in the gray area to the left of the time chart.

- FloorWizard uses three factors to determine the displayed order of measuring personnel, in order of greatest to least importance:
  1. Whether or not the person is assigned to the same zip code that the job occurs in.
  2. Whether or not the person is associated with the company who owns the job.
  3. Personnel with the fewest scheduled appointments for the day.

- A person's name appears in green if they are assigned to the same zip code that the job occurs in. Permission is required to assign the appointment to a person who is not working in the customer's area. When you assign the appointment, you will see a dialog box indicating whether or not you have this permission. If you do not, contact your administrator to change “Person Parameters.”
The confirmation status bar indicates whether or not the customer has been contacted and informed of their scheduled appointment.

Procedure for scheduling an appointment:

1. Select the company of the personnel, or select “All Companies” to view all available people.

2. View the daily schedules of the specified company’s personnel by advancing the list with the scroll bar.

3. Decide when you would like the appointment to begin from the available colored time periods. Click the desired starting time to assign the appointment. You can also use the quick assign feature at this time. Quick Assign will use logic to choose the best available time period for the intended personnel. Permission is required to assign an appointment which violates the person’s established cutoff time, or scheduling buffer to prevent overbooking. When you assign an appointment that violates the person’s cutoff time, you will see a dialog box indicating whether or not you have this permission. If you do not, contact your administrator to change “Person Parameters.”

4. Click the “Add” button.

** If necessary, you can increase or decrease the appointment length using the buttons above the time chart. This is especially useful if you know, in advance, that the appointment will be longer or shorter than FloorWizard’s prediction.
Understanding color coding:

- **Green**: The appointment will fit in the time period.
- **Yellow**: The time period is 15 minutes too short to accommodate the appointment. If necessary, the appointment can be scheduled for this time. Scheduling the appointment in a yellow time period will result in the overlap of adjacent time periods.
- **Red**: The time period is at least 30 minutes too short to accommodate the appointment.
- **Blue**: Other appointments have been scheduled and the time period is completely booked. Without rescheduling, no appointments will fit.
- **Gray**: The person is not working based on their normal work schedule. This can also indicate non-routine time off.

To update an existing appointment:

1. Some information can be easily changed from this screen by using the pull down menus or information fields.
2. Make necessary adjustments, and click the “Update” button.
3. **To change project or customer information about the appointment, revisit the project center. If you would like to reschedule or reassign the appointment, see the following page.**
To edit an existing appointment:

1. Highlight the appointment you want to edit.

2. Click the "Edit" button.

3. From this point, the procedure is the same as setting a new appointment. Make the necessary changes and click the "Update" button.
To view current or cancelled appointments:

Use the pull down menu to highlight the desired appointment status.