



Appointment Scheduling

Scheduling Calendar

Staff Capabilities

Distance to Next Appointment

Time Block Scheduling

Staff Calendar Filtering

Custom Calendar Text

Appointment Report Counts



improveit 360



Agenda

Review the common Appointment Scheduling functionality:

- Scheduling Calendar – from Appointment Creation Screen Flow
 - ❑ Distance to Staff Address and Distance to Next Appointment
 - ❑ Staff Capabilities & Territories Filters
- Time Block Scheduling
 - ❑ Assign Sales Appointments to Reps later using Dispatcher
 - ❑ Group Appointments by Territory or Product Category
- Staff Calendar Filtering
 - ❑ Staff Filters: Product Categories, Territory
 - ❑ Calendar Tile Filters: Appointments, Project Activities, Events
- Scheduling Settings
 - ❑ Set Default Duration for Sales Appointments and Project Activities
 - ❑ Select Scheduling Settings: Time Block Calendar and/or Scheduling Calendar
- Reporting
 - ❑ Sales Appointment Report Count Fields – what is “Issued” and “demoed” and how does that relate to Resulting?

Scheduling Calendar

Available from...

- Account page: click Schedule Sales Appointment
- Sales Appointment page: click Reschedule

The screenshot displays the 'Scheduling Calendar' interface. At the top, a navigation bar includes buttons for 'Edit', 'Schedule Sales Appointment' (highlighted with a red box), 'Create Address', 'Create Sale', and 'New Note'. Below this, the 'Account Timeline' section shows a list of appointments with times and dates: 1:17 PM | 9/16/24, 12:50 PM | 9/16/24, and 12:48 PM | 9/16/24. A map view is also visible, showing a street map with a red location pin. The map includes labels for 'Map', 'Satellite', 'Buttles Ave', 'Highland St', 'Virginia Ct', and 'Hunter Ave'. A red location pin is placed on the map near the intersection of Neil Av and Highland St. The map also features a 'Reschedule' button (highlighted with a red box) and a 'Create Quote' button.

Scheduling Calendar

- Sorts Staff by Name, Score or Distance to Appointment
- Filtered based on Product Categories (selectable)
- Filtered by Territory (selectable)
- Distance to previous/next Appointment and Staff

Staff/Time Block Territory

Cincinnati X

All

None

Sort Scheduling Calendar By

Name

✓ Name

Score

Distance

Sales Capabilities

Doors X

Flooring X

Sammy Sales

7.3 mi to Next

7.3 mi to New

Steve Sales Guy

27.6 mi to Next

21.7 mi to New

Steven Service

20.5 mi to New

Sylvia Sales

16.3 mi to Next

5.5 mi to New

Sales Appointment

Jordan McDowell

Columbus

Exterior Trim, Siding, Soffit & Fascia



27.6 mi to Staff

13.5 mi to New

Sales Appointment

Jordan McDowell

Columbus

Exterior Trim, Siding, Soffit & Fascia



10.2 mi to Next

13.5 mi to New

Sales Appointment

Gerry Hopewell

Columbus

Exterior Trim, Gutters, Leaf Guards



No

13.6 mi to Staff

8.3 mi to New

Staff Capabilities, Territories & Color

The most common reasons someone does not show up on the Calendar.

- Set Capabilities
- Show on Calendar
- Territories

Show on Calendar

☒

Sales Capabilities

Available		Chosen
Basement Remodel	▶	Roofing
Baths	◀	Siding
Doors		Soffit & Fascia
Flooring		Trim
Kitchen Remodel		Gutters

Territories

Available		Chosen
Nevada	▶	Cincinnati
California	◀	Cleveland
Arizona		Columbus
		Pittsburgh

Calendar Color

 #FC7A57 Reset Save





Hex: #FC7A57 R: 252 G: 122 B: 87

Cancel Done

Distance to Next Appointment

Q 1185 F

1185 Fair Ave, Columbus, OH 43205

1185 Fairwood Ave, Columbus, OH 43206

1185 Fountain Ln, Apt (7 entries), Columbus, OH 43213

1185 Fountain Ln, Columbus, OH 43213

Map

Satellite

Map

Satellite

✓ Verified

✓ Geolocated

Ingrid Inside Sales

8.1 mi to Next

Sales Appointment

Marissa Massucci

Baths

Phone: 614-589-6253

N

3.7 mi to Next

Event

Lunch M...

Sales Appointment

Teresa Dunn

Columbus

Flooring, Roofing

Phone: 614-3982623

N

7.0 mi to Staff

- An Address record related to the Staff record determines the Distance to the first Appointment of the day
- Distance to/from Calendar Events is not Calculated (lunch meeting in this example)

Distance to Next Appointment

✕ Verified ✕ Geolocated

📍 Update Address

🔍 305 E Whitt

- 305 E Whittier St, Columbus, OH 43206
- 305 E Whittier Ave, Fairborn, OH 45324
- 305 Whittlesey Dr, Tallmadge, OH 44278

📍 Update Address

🔍 305 E Whittier St, Columbus, OH 43206 ✕

Street
305 E Whittier St

City
Columbus

State/Province
OH

Postal Code
43206

Country
US

Save

- Use the **Update Address** Modal to re-Verify and re-Geolocate
- If one or both addresses on the Calendar have not been Geolocated, no Distance can be displayed

Toggle between Scheduling Tools

☐ Hide Full Time Blocks

▼ Time Block Scheduling Calendar

Work Week

Apr 21 – 26, 2025

Mon 4/21	Tue 4/22	Wed 4/23	Thu 4/24	Fri 4/25
Mon Wed Fri AM 0/5 9:00a - 12:00p	Tues Thurs AM Sales 0/4 9:00a - 12:00p	Mon Wed Fri AM 0/5 9:00a - 12:00p	Tues Thurs AM Sales 0/4 9:00a - 12:00p	Mon Wed Fri AM 1/5 9:00a - 12:00p
Mon Wed Fri PM Sales 0/5 2:00p - 5:00p	Tues Thurs PM Sales 0/4 2:00p - 5:00p	Mon Wed Fri PM Sales 0/5 2:00p - 5:00p	Tues Thurs PM Sales 1/4 2:00p - 5:00p	Mon Wed Fri PM Sales 0/5 2:00p - 5:00p

> Scheduling Calendar

☐ Hide Full Time Blocks

> Time Block Scheduling Calendar

▼ Scheduling Calendar

Staff Day

Wednesday, March 18, 2026

Today

<

>

Staff	8am	9am	10am	11am	12pm	1pm	2pm	3pm	4pm	5pm
Cathy California ★★★★★ Unknown to New										
Cecil Service ★★★★★ 1.5 mi to New										

- Expand Time Blocks Scheduling Calendar and it automatically collapses the Scheduling Calendar
- ...and vice versa

Time Block Scheduling

15	16	17	18	19
MWF Pittsburg... 0/4 9:00a - 11:00a		MWF Pittsburg... 2/4 9:00a - 11:00a		MWF Pittsburg... 0/4 9:00a - 11:00a
22	23	24	25	26
MWF Pittsburg... 4/4 9:00a - 11:00a		MWF Pittsburg... 0/4 9:00a - 11:00a		MWF Pittsburg... 4/4 9:00a - 11:00a
29	30	1	2	3
MWF Pittsburg... 4/4 9:00a - 11:00a		MWF Pittsburg... 2/4 9:00a - 11:00a		

- Allows quick assignment to a Block of time, rather than a specific Rep
- Appointment Schedulers unfamiliar with Sales Reps
- Capacity Scheduling allows blocks to be filled, and Appointments assigned to the Reps later, using the Dispatcher tool

improveit 360 Sales Appointmen

App Launcher

Time Block

Apps

No results

Items

Create Time Blocks

Time Block Calendar

* Time Block Name
M W F Service Pittsburgh AM

Department
Service

* Capacity
4

Territories
Pittsburgh

* Time Block Type
Capacity Scheduling

Staff
Search Staff...

Allow Overcapacity Scheduling
☐

Product Categories
Search Product Categories

Service

* Start Date/Time
* Date
Apr 29, 2026
* Time
9:00 AM

* End Date/Time
* Date
Jul 1, 2026
* Time
11:00 AM

* Days of Week
Sun Mon Tue Wed Thu Fri Sat

Create One Time Block for Multiple Territories
☒

Reset Save

Time Block Scheduling

Staff Availability vs Capacity Scheduling

Assign a Specific Rep to the Time Block

versus

No Staff related to
the Time Blocks

* Time Block Name

Cincy Cincinnati Sales Appts

Department

Sales

* Capacity

2

Territories

Q Search Territories

Cincinnati X Columbus X

Start Date/Time

* Date

Jun 29, 2026

* Time

9:00 AM

* Days of Week

Sun

Mon

Tue

Wed

Thu

Fri

Sat

* Time Block Type

Staff Availability

* Staff

Cindy Cincinnati Sales X

Allow Overcapacity Scheduling

☐

Product Categories

Q Search Product Categories

Basement Remodel X Baths X Doors X Exterior Trim X Flooring X Gutters X Kitchen Remodel X Leaf Guards X Roofing X Siding X Soffit & Fascia X Trim X Windows X

End Date/Time

* Date

Jul 31, 2026

* Time

6:15 PM

Create One Time Block for Multiple Territories

☒

Reset

Save

Dispatcher tool

- See Distance to Next and Previous Appointment
- Quickly Assign a Rep



App Launcher

Apps
No results
Items
Dispatcher
[View All](#)

Filter

Display Field
Appointment Date/Time ▼

▼ Robin Mastley - New
3/19/26, 10:00 AM EDT

Appointment Date/Time ⓘ
3/19/2026, 10:00 AM

Appointment End Date/Time
3/19/2026, 1:00 PM

Street Address
4158 Woodville Dr

City
Columbus

State/Province
OH

Zip/Postal Code
43230

Product Categories
Doors

Sammy Sales 9.7 mi to New	Sales Appointment Jasmine Elias Columbus Flooring, Other N No 6.3 mi to Next 2.4 mi to New	Sales Appointment Teresa Dunn Columbus Flooring, Roofing N 6.9 mi to Staff 7.4 mi to New
Steve Sales Guy 20.4 mi to New	Sales Appointment Jordan McDowell Columbus Exterior Trim, Siding, Soffit & Fascia N 27.6 mi to Staff 15.7 mi to New	
Steven Service 19.2 mi to New		
Sylvia Sales 6.2 mi to New	Sales Appointment Lawrence Huttleson Columbus Basement Remodel N 4.2 mi to Next 11.6 mi to New	Sales Appointment Gerry Hopewell Columbus Exterior Trim, Gutters, Leaf Guards N 13.6 mi to Staff 9.2 mi to New

Staff Calendar



all events sales appointments project activities

Week

June 28 – July 4, 2026

Today



Staff	Sun 6/28	Mon 6/29	Tue 6/30	Wed 7/1	Thu 7/2	Fri 7/3	Sat 7/4
Cathy California ★★★★★			Sales Appointment Harry Hood Columbus Bathrooms Phone: (614) 362-4334 N				
Cecil Service ★★★★		Event PTO Day	Sales Appointment Heather Corriea Baths Phone: 508-717-9422 N				
Cindy Cincinnati Sales ★★★★★			Sales Appointment Douglass Furr Roofing Phone: (614) 398-2623 N		Sales Appointment Joshua Allen Columbus Gutters, Roofing Phone: 614-845-4521 N		
Ian Installer ★★★★★	Project Activity Installation Joe Lonardo Baths				Project Activity Installation Lauren Williams Columbus		
			Project Activity Installation Mary Greever Cleveland Doors				
Igor Installer ★★★★★		Project Activity Install Helen Mallory Columbus Doors	Project Activity Installation Ramon Alvarez Windows				

Staff Calendar Filtering

Filter **Staff** members by:

- Territories
- Capabilities (Sales, Projects) Product Categories

Filter the **Items** on the Calendar by:

- Territories
- Product Categories

The 'Filter Staff' dialog box contains three sections for filtering staff members. The 'Territory' section has a dropdown menu with four selected items: 'Pittsburgh', 'Cincinnati', 'Columbus', and 'Cleveland', each with a close button (X). To the right are 'All' and 'None' buttons. The 'Sales Capability' section has a dropdown menu with 'Sales Capability' selected. Below it is a list of project categories: 'Basement Remodel', 'Baths', 'Doors', 'Flooring', 'Gutters', 'Kitchen Remodel', 'Leaf Guards', 'Roofing', 'Siding', 'Soffit & Fascia', 'Trim', and 'Windows', each with a close button (X). To the right are 'All' and 'None' buttons. The 'Staff' section has a search bar with a magnifying glass icon and 'All' and 'None' buttons.

The 'Filter Calendar Items' dialog box contains two sections for filtering calendar items. The 'Territories' section has a dropdown menu with four selected items: 'Pittsburgh', 'Cincinnati', 'Columbus', and 'Cleveland', each with a close button (X). To the right are 'All' and 'None' buttons. The 'Product Categories' section has a dropdown menu with 'Flooring' selected. To the right are 'All' and 'None' buttons.

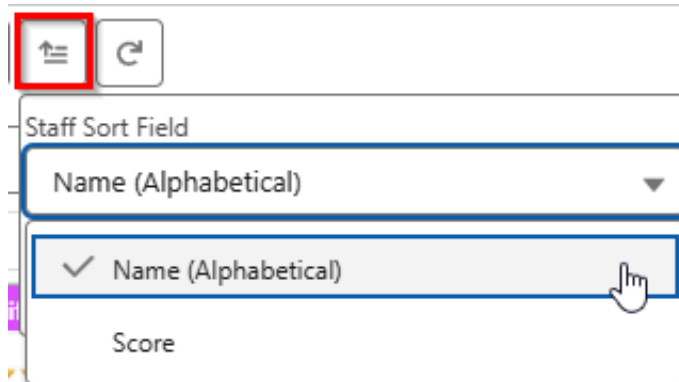
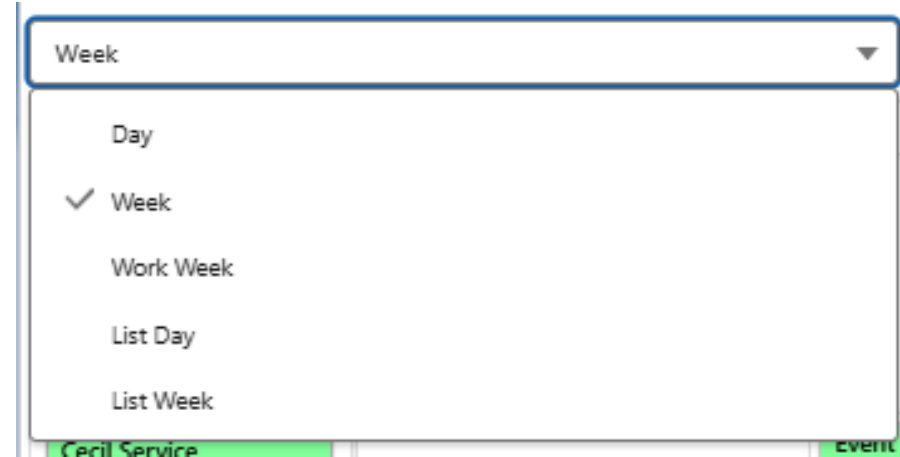
Filter on the **Type** of Calendar Item as well

The 'Filter Calendar Items' dialog box shows a 'Type' filter section with four buttons: 'all', 'events', 'sales appointments', and 'project activities'. The 'sales appointments' button is highlighted in blue.

Staff Calendar Views

Views: Day / Week / Work Week

- Sort Alphabetically or by Score
- Display Staff in Rows, grouping each Staff member's events together
- Scroll down to see more Staff
- Use Staff Filters to reduce number of Rows displayed



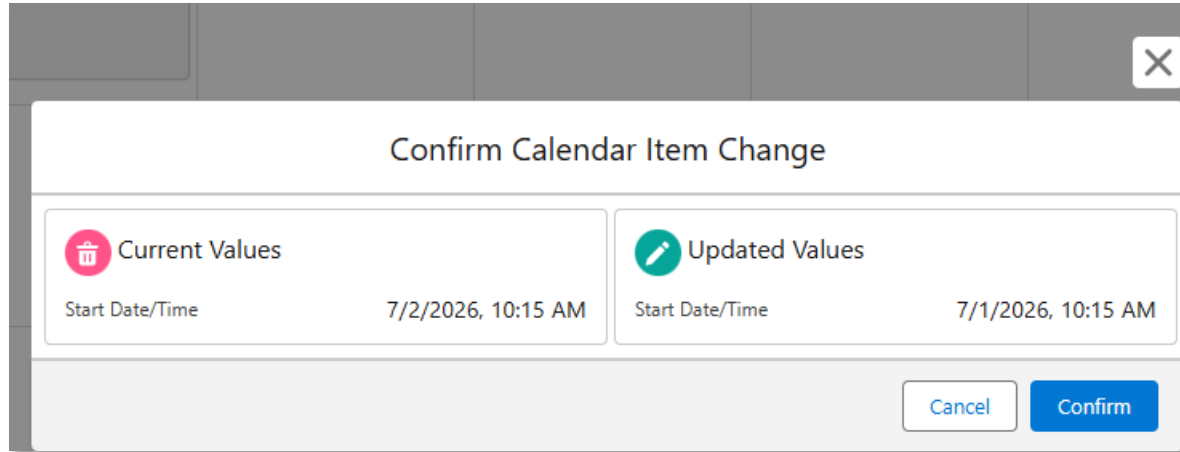
Scheduling Tip:

Sort Staff by Score and always assign the top performer to the most valuable leads

Staff Calendar Drag and Drop

Quickly Re-Assign by dragging and dropping
Move Appointment to a different day or time

NOTE: Unassigned Appointments will not show up on the Calendar
Use the Dispatcher tool to assign any Unassigned Appointments



A screenshot of a 'Confirm Calendar Item Change' dialog box. The dialog has a title bar with a close button (X). It contains two columns: 'Current Values' with a trash icon and 'Updated Values' with a pencil icon. Both columns show 'Start Date/Time' as '7/2/2026, 10:15 AM' and '7/1/2026, 10:15 AM' respectively. At the bottom are 'Cancel' and 'Confirm' buttons.

Confirm Calendar Item Change	
 Current Values	 Updated Values
Start Date/Time	Start Date/Time
7/2/2026, 10:15 AM	7/1/2026, 10:15 AM
Cancel Confirm	

Scheduling Settings

Edit Scheduling Settings Save Cancel

Scheduling Settings Information

Location Your Company Name

Default Sales Appointment Duration

Use Project Activity Time Blocks ☒

Use Sales Appointment Time Blocks ☒

Use Project Activity Scheduling Calendar ☒

Use Sales Appt Scheduling Calendar ☒

Default Project Activity Duration

Setup **Home** **Obj**

▼ Custom Code

Custom Settings

☐ Hide Full Time Blocks

> Time Block Scheduling Calendar

▼ Scheduling Calendar

Staff Day ▼

Wednesday, March 18, 2026

Today

Staff	8am	9am	10am	11am	12pm	1pm	2pm	3pm	4pm	5pm
Cathy California ★★★★★ Unknown to New										
Cecil Service ★★★★★ 1.5 mi to New										

Action	Label ↑
Manage	Calendar Settings
Manage	PaySimple Settings
Manage	Scheduling Settings
Manage	Record 11 Scheduling Settings



Custom Staff icons
provide at-a-glance data

Assisting Appointment Schedulers

Be sure to Assign the best possible Rep to each Appointment

Sort by Score - Sylvia should be at the top!

Calendar Tile Custom Icons

Customization:
Starts at \$500



Supports custom
text fields and
small custom
icons or images:

Appointment Details

Type

New

Product Categories

Doors

Taken By

[Olivia Admin](#)

Ingrid Inside Sales ★★★★★		Event Lunch Meeting with Alice @ Q...	Sales Appointment Marissa Massucci Baths Phone: 614-589-6253 ✓ N	Sales Appointment Teresa Dunn Columbus Flooring, Roofing Phone: 614-3982623 🔄	
Kyle Commerce ★★★★★	Sales Appointment Douglass Furr Roofing Phone: (614) 398-2623 ✓ N →		Sales Appointment Jordan McDowell Columbus Exterior Trim, Siding, Soffit & Fa... Phone: 740-589-6523 ✕		Sales Appointment Lawrence Huttleson Columbus Basement Remodel Phone: 740-859-6235 N
Lisha Collins ★★★★			Sales Appointment Patrice Williams Columbus Doors Phone: 740-859-5412 RE#		
Sammy Sales ★★★★	Sales Appointment Gerry Hopewell Columbus Exterior Trim, Gutters, Leaf Guar... Phone: 740-865-2156 ✓ N →	Sales Appointment Robin Mastley Columbus Doors Phone: 740-859-6523 ✓ N →	Sales Appointment Jasmine Elias Columbus Flooring, Other Phone: 740-859-6523 N	Sales Appointment Teresa Dunn Columbus Flooring, Roofing Phone: 614-3982623 🔄	
Steve Sales Guy ★★★★			Sales Appointment Jordan McDowell Columbus Exterior Trim, Siding, Soffit & Fa... Phone: 589-589-6523 ✕		

Appointment Report “Count” Fields

		<----Reporting Fields---->						
		Sold	Demoed	Not Confirmed	Canceled	Issued	Set	Ran
Sales Appointment Status Detail								
	Sold							
	One leg							
	Not Demoed							
	No Show							
	Follow-up							
	Demoed, Not Sold							
	Canceled							
Any Status Detail + Staunts = Ran								
Confirmed On Date is Blank								

Not Resulted?

- Not Issued
- Not Demoed
- Not Run

**Appointments
MUST be
Resulted to
Count in
Reports**

An “**Issued**” Appointment MUST have a Status Detail of one of the following:

Sold, Demoed Not Sold, Follow-up, No Show, Not Demoed, or One Leg

Sales Opportunity tracking

▼ Sales Opportunities ⓘ

 **Doors**

Result
Dead

Result Detail
--None--

Comments

Project Budget ⓘ

▼ Sales Opportunities ⓘ

 **Doors**

Result
Sold

Result Detail
--None--

Comments

Project Budget ⓘ

Not Sold – allows your team to continue working the lead until it sells

▼ Sales Opportunities ⓘ

 **Doors**

Result
Not Sold

Result Detail
One Leg

Comments

Project Budget ⓘ

Dead and Sold

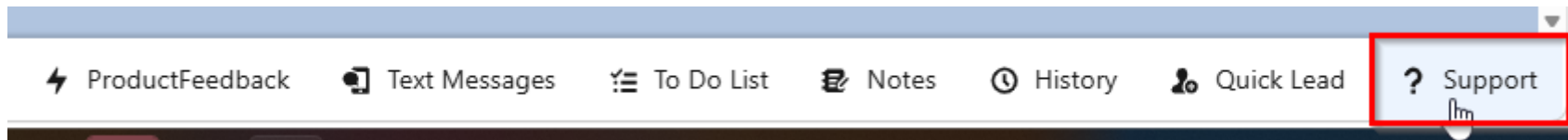
Complete the Sales Opportunity

How to Reach Us

1. Admins – Use the Toolbar within your system: Click **Support**
2. Open a Ticket at:
<https://i360lightning.zendesk.com/>
3. Or Email Us:
support@improveit360.com

Support Office Hours:

Monday – Friday, 9am-5:30pm Eastern time





Thanks for Attending



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