Appointment Scheduler™

Organizational Tool for the HVAC Professional

Instruction Manual

ADTEK SOFTWARE

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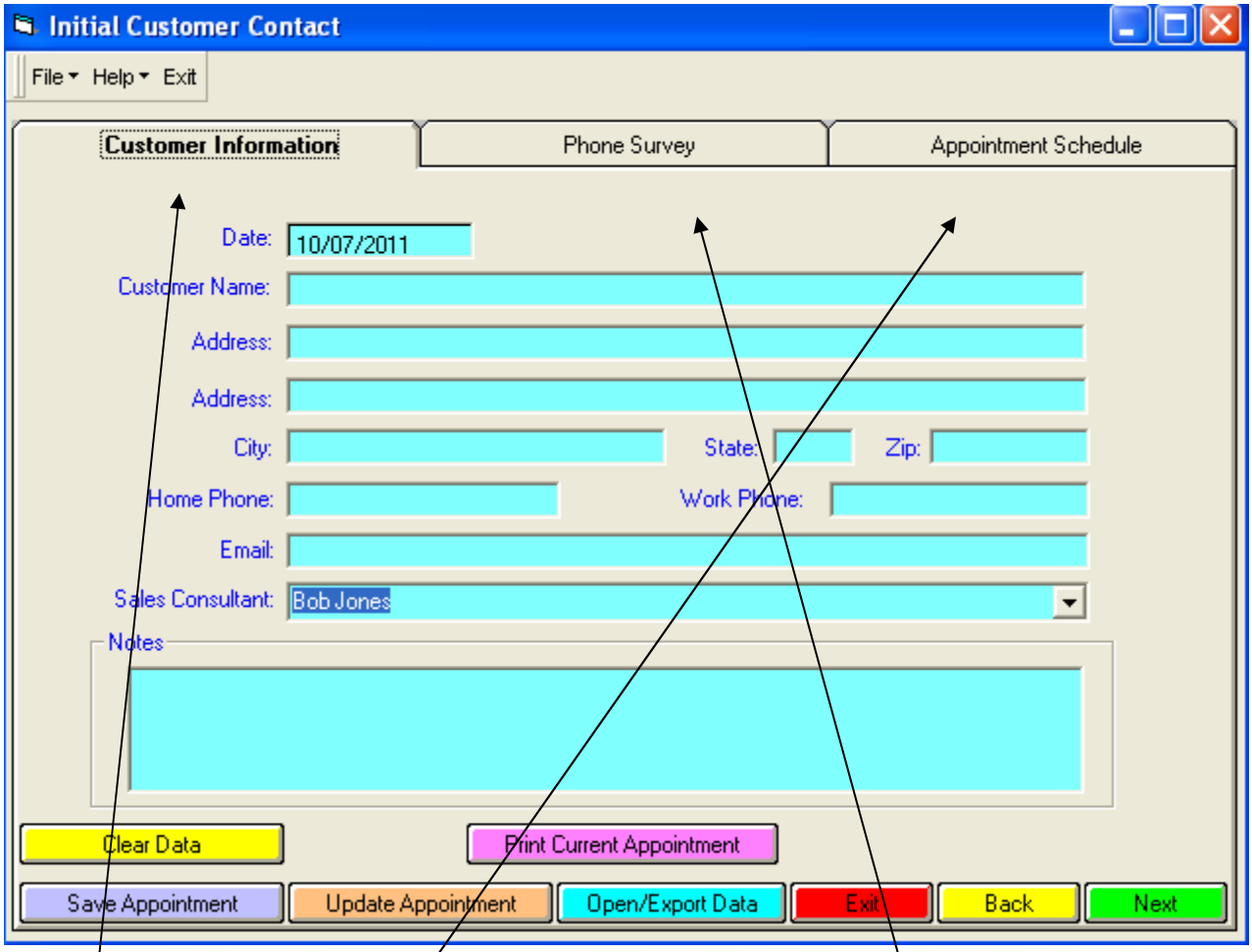
I. Customer Information Screen
Screen Layout

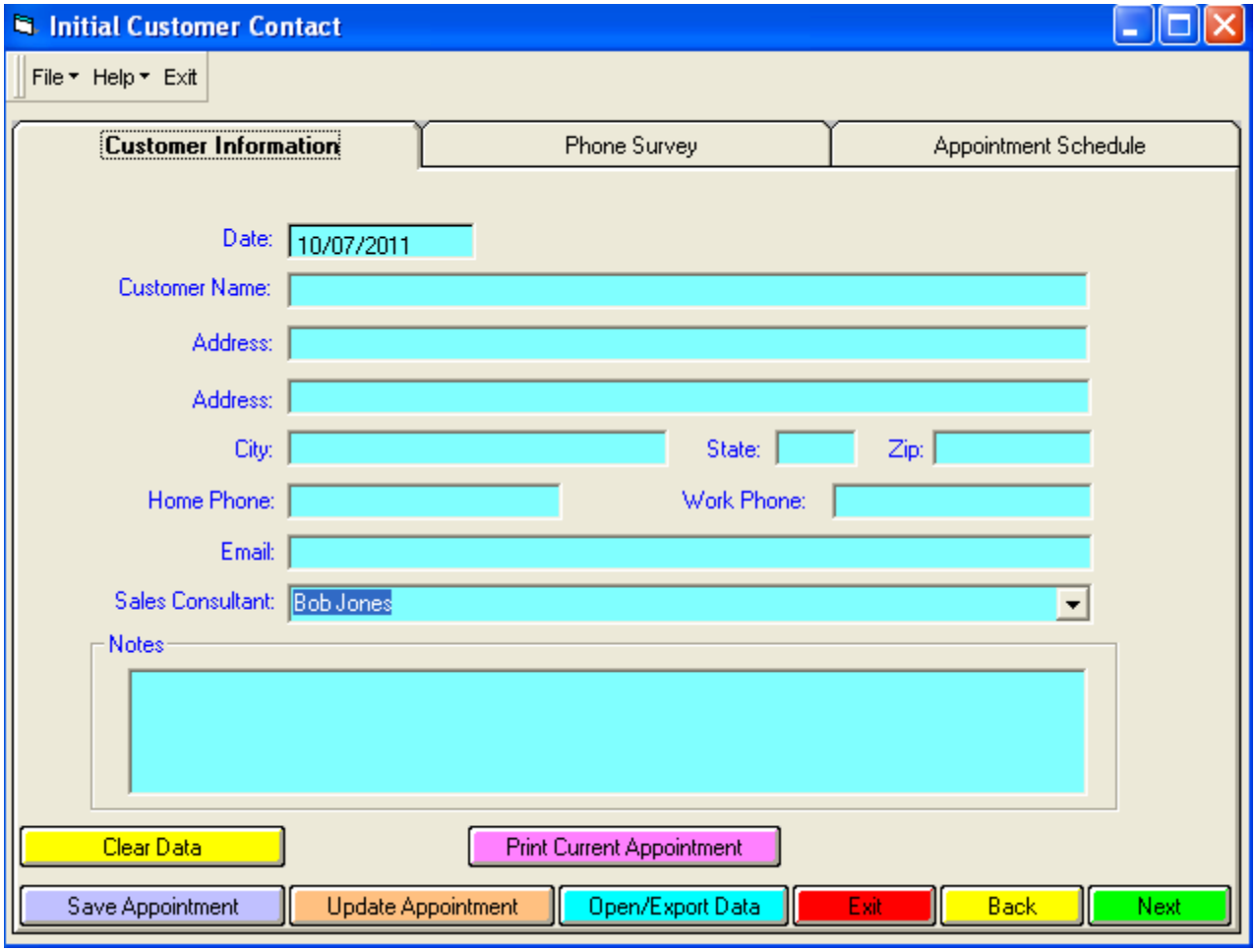


Customer Information: Simply record all of your necessary customer information.

Phone Survey: Follow the pattern of questions, to get a better feel for what your client may need in terms of an HVAC System.

Appointment Schedule: View, Edit, and Print Daily or Weekly Appointments

I. Customer Information Screen
Button Features



Clear Data: Clears Current Record and starts a new record

Print Current Appointment: Prints the current open customer's log

Save Appointment: Saves current open appointment record

Update Appointment: Updates current open appointment record

Open/Export Data: Open Customer Files and/or Export Customer data to other sales consultants

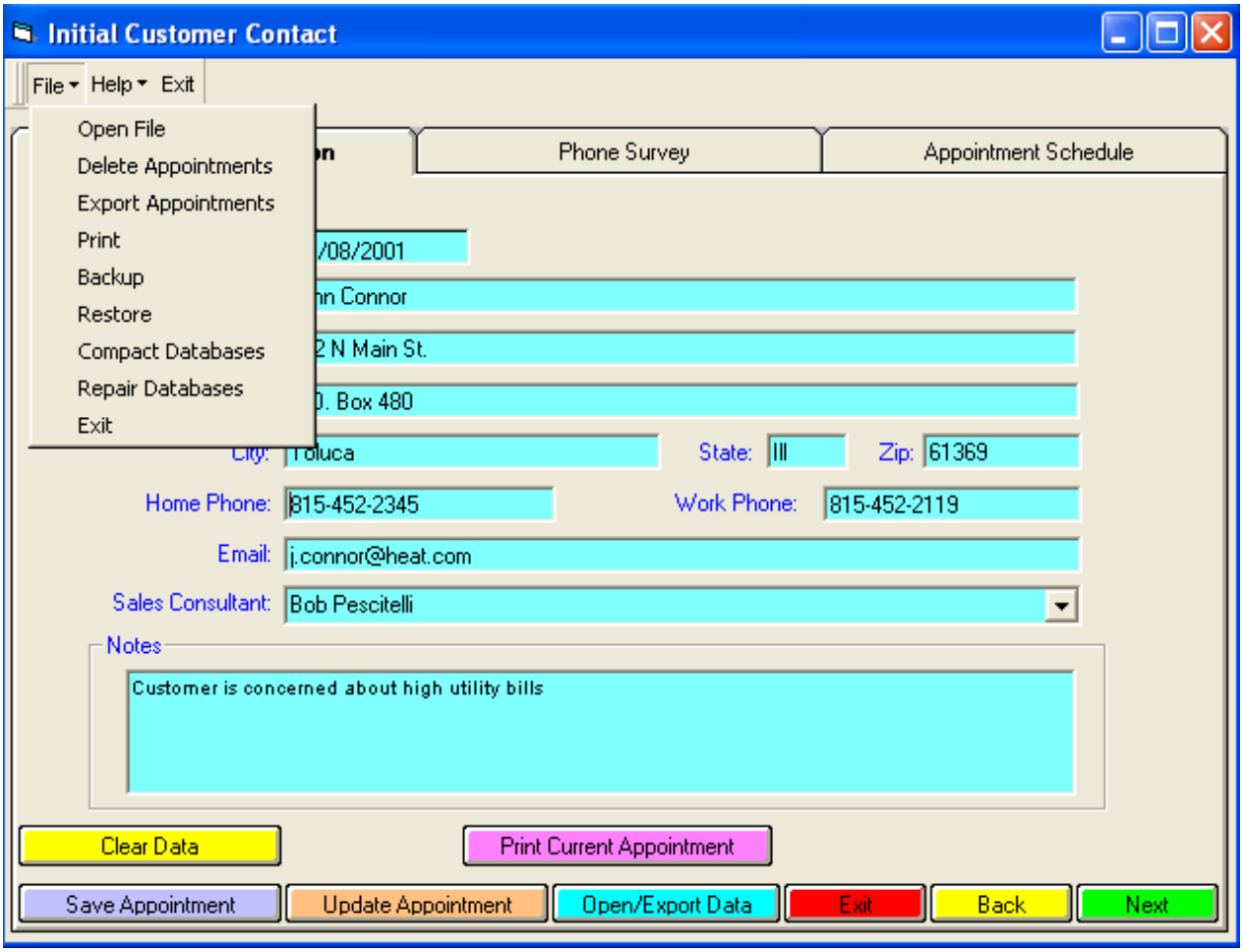
Exit: Closes the program

Back: Goes to previous screen

Next: Goes to Phone Survey screen.

Tip: Use the "tab" button on your keyboard to quickly move from text box to text box when entering customer information.

I. Customer Information Screen
Menu Bar



Open File: Open any customer record stored within your program

Delete Appointments: Remove customer information and appointments no longer needed

Export Appointments: Export customer files to other sales personnel machines

Print: Opens print options

Backup: Store your customers in a specific location

Restore: Pull in previously backup up customers

Compact/Repair Databases: Minimize the size of your customers by a routine compacting

Exit: Closes the program

Tip: Routinely backup your customers in case of hard drive failure or computer crash.

II. Phone Survey
Six Critical Questions

1) What type of job is the customer interested in? Ask your client what the type of job you will be dealing with in relation to the install.

2) After coming to terms with the type of job, what equipment is your client interested in? Simply check the boxes for the type of equipment your client is concerned with installing.

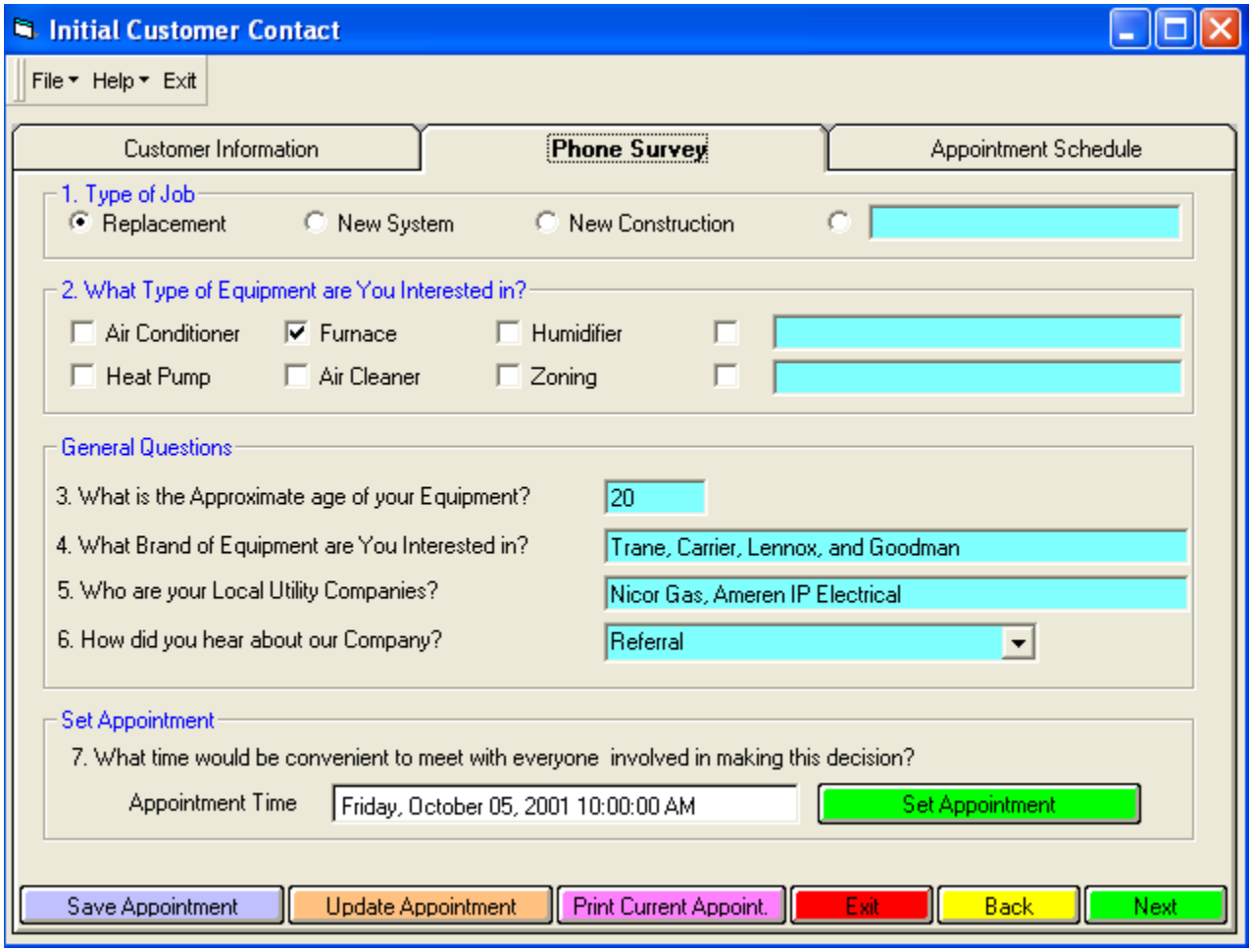
3) How old is the current equipment? By getting this answer, you can then utilize it for use with operational cost savings of newly installed equipment.

4) What brand of equipment? Depending on how many lines of equipment you offer, your customer may look at a few different brands and styles of equipment, depending on the job.

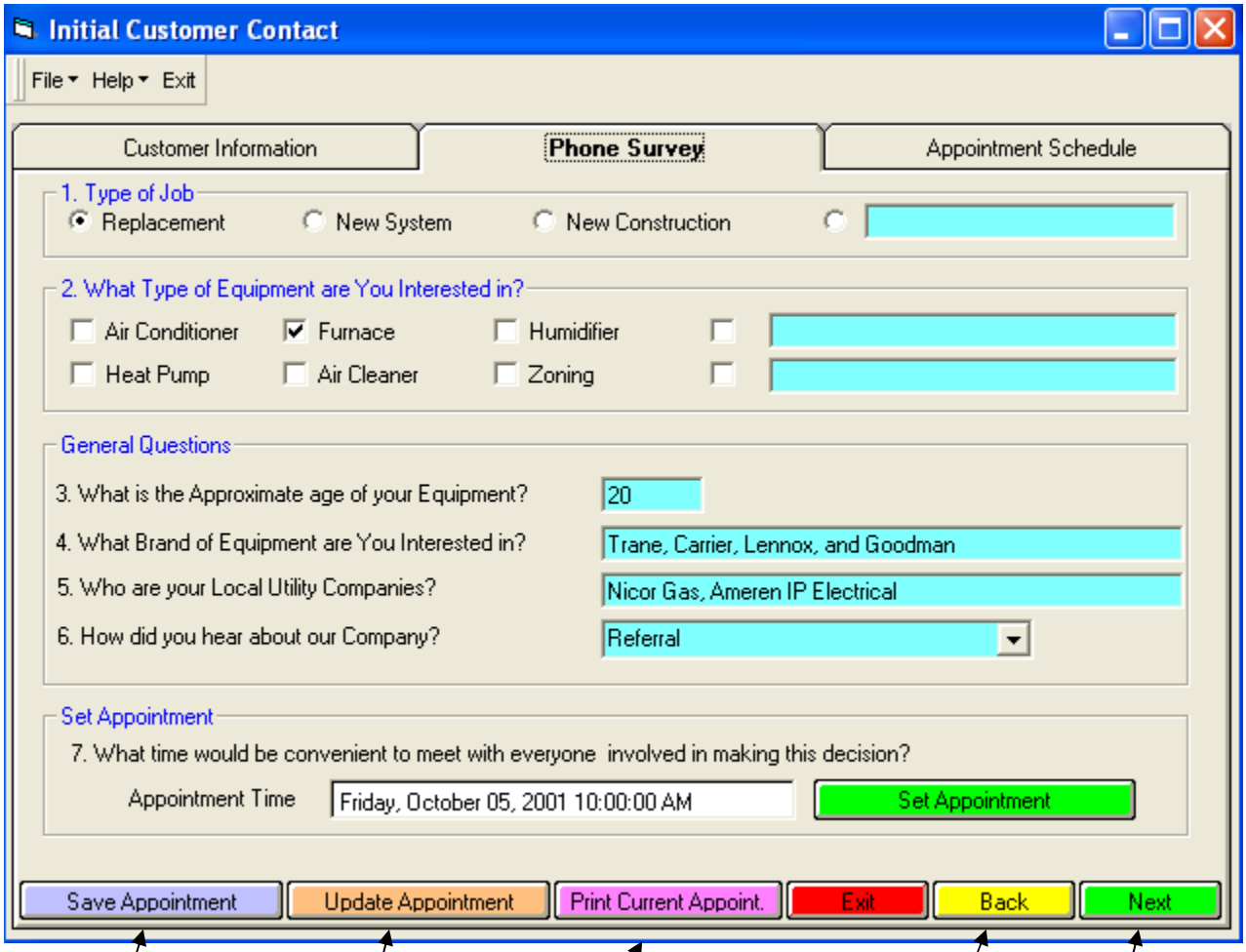
5) Who are the local utility companies? This gives you the option of not only scheduling meetings with those utility companies, but allows you access to important rebate information as well.

6) How did you hear about our Company? Record and track leads.

7) What time is the appointment? After recording all of the necessary information, schedule your appointment and add it to your calendar for future use.



II. Phone Survey
Survey Buttons



Save your current appointment, and information you have previously entered

Update current appointment information

Print the current customer information after you have scheduled a time

Exit the Program

Go back to the customer information screen

Go to the appointment screen to view, and/or print appointments

III. The Calendar View
Maneuvering Around

Customize Schedule: Create your own customized schedule in relation to times, how your calendar looks, and what you would like to show up.

Add Sales Consultants: Insert newly hired or new staff to track their schedules.

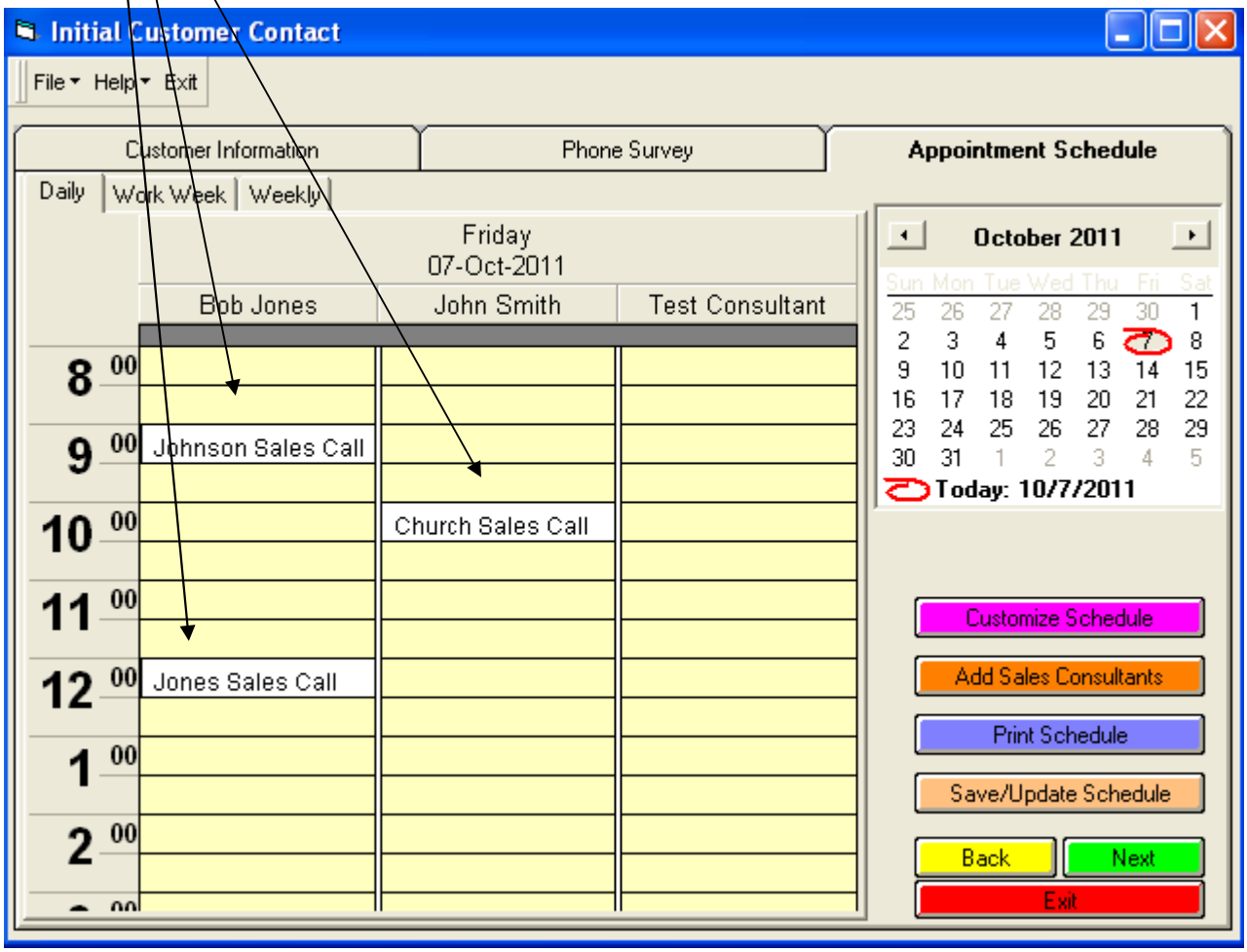
Print Schedule: Print a daily, weekly, or monthly schedule by one sales consultant or all of them.

Save/Update Schedule: Save or update current schedule information.

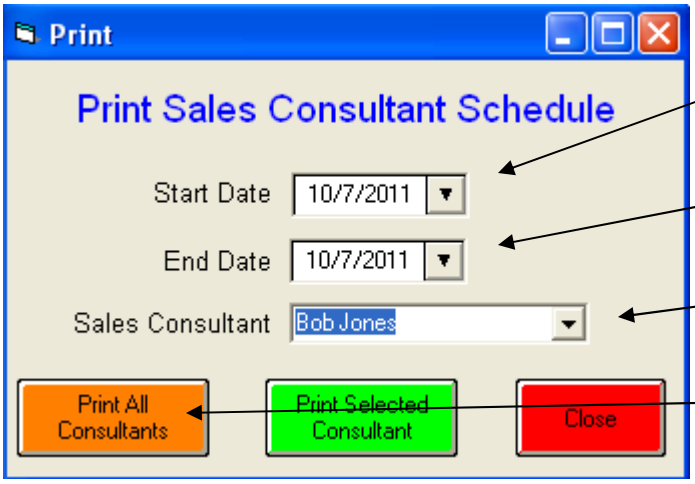
Back/Next: Go back to the phone survey, or next to go to the customer information.

Exit: Close the program.

Appointments: From previously entered information, you can now see your current appointments as they appear on the calendar screen.



IV. Printing
Printing Options



Choose the start date of the calendar you would like to print.

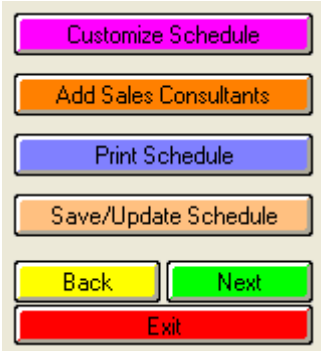
Choose the end date of the calendar you would like to print.

Choose the consultant you would like to print.

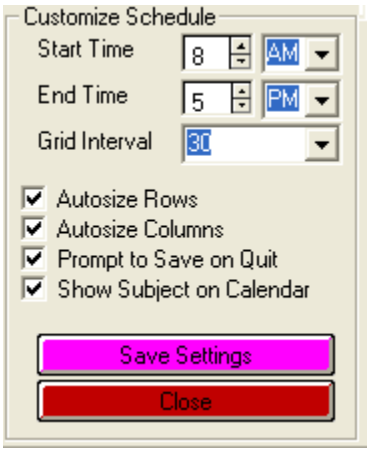
Print All Consultants

IV. Printing
Customizing your Schedule

To customize your schedule, including times, how you want your schedule to appear, and the layout of a certain schedule, click on the purple "customize schedule" button.



Tip: Always leave the "prompt to save on quit" box checked. This will prevent you from closing the program without saving important customer information.



Insert the start and end time of your appointments that will print out on your schedule.

Format how your calendar will print out, including size for each appointment and information that may or may not be included with your files.

V. Reports
Daily Schedule

Your Sales Consultant Name

Sales Consultant Schedule

Bob Jones

10/7/2011

9:00:00 AM	Johnson Sales Call
12:00:00 PM	Jones Sales Call

Time of Daily Appointments

Subject of Daily Appointments

V. Reports
The Current Appointment

Sales consultant info

All entered customer information

Phone Survey Questions appear as they do within the program, including type of equipment, and lead tracking

Sales Appointment for: **Bob Pescitelli**

Scheduled Appointment: **Friday, October 07, 2011 9:00:00 AM**

Customer Name: John Connor
Address: 122 N Main St.
Address: P.O. Box 460
City: Toluca State: Ill Zip: 61369
Home Phone: 815-452-2345 Work Phone: 815-452-2119
Email: j.connor@heat.com
Notes:
Customer is concerned about high utility bills

Type of Job: Replacement

Equipment Interested In:

- [ ] Air Conditioner
- [x] Furnace
- [ ] Humidifier
- [ ] _____
- [ ] Heat Pump
- [ ] Air Cleaner
- [ ] Zoning
- [ ] _____

Approximate Age of Equipment: 20
Equipment Brand Interested In: Trane, Carrier, Lennox, and Goodman
Local Utility Companies: Nicor Gas, Ameren IP Electrical
How did you hear about our Internet

Any customer notes/concerns

Notes:

For Ordering Information

Or Technical Support

Telephone: (815) 452-2345

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E-mail: sales@adteksoft.com

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