

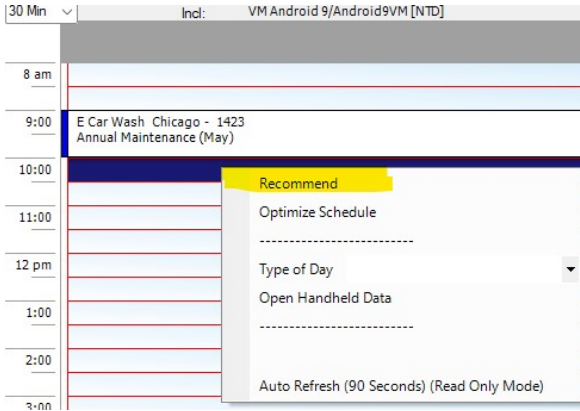
### 3– Review Schedule

Look at the schedule for any days that already appointments and still time in their day.

If found, click a blank time after an appointment

Right Click

Click Recommend



This opens Recommendations sorted by Distance to the one already on the calendar

(If ApptRequired = 1 call them to confirm appointment.)  
Otherwise just double click the top row (the closest) fill in any Notes and F9 (Save & Close)

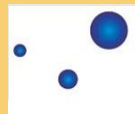
Refresh. Repeat for blank time after this appointment  
Repeat until Trucks Day is full.  
Repeat entire process for another day or another truck

### 4– Fill In the Rest

At some point all of the recommendation times may be filled.  
When that happens, just go to the recommendation tab and select any desired customer and put it onto any desired open day/time.

Then repeat step 3  
Until ALL Unscheduled appointments have been scheduled

For more details visit  
[www.LongwellTech/tta](http://www.LongwellTech/tta)



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# Trakker Quick Start Scheduling Unscheduled Appointments



**Longwell Technologies, Inc.**

[www.LongwellTech.com](http://www.LongwellTech.com)

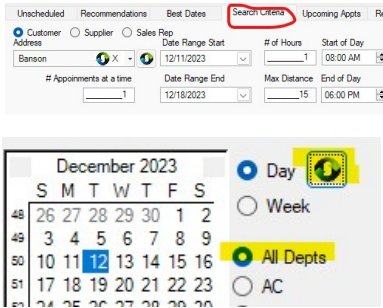
# 1- Set Search Criteria

On the schedule, select Search Criteria Tab

Verify all of the fields to base searches on

- Start Date
- Max Dist
- ...

Also set All Depts and Refresh

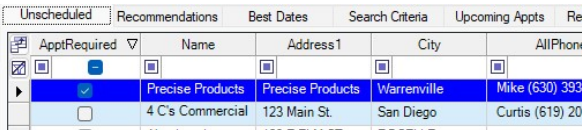


# 2- Call Required Appts

Making appointments with customer who require appointments is a great place to start. This will build starting points for many days, and help ensure that even your most difficult customers are efficiently schedule .

Go to Unscheduled Tab

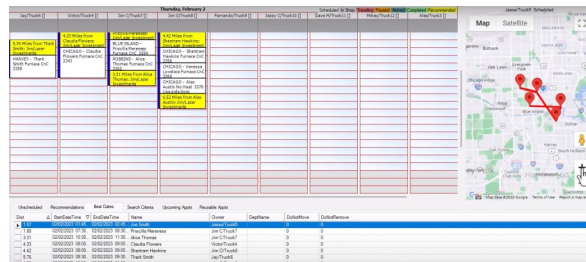
Sort by Appt Required (ones with check Appt Required)



Call them, using All Phone, or open and look at Phone list

Click on row right click-> Recommend

Shows Best Dates with Distance from exiting Appt. Click on a row to view in YELLOW on calendar



Click on Trucks day to see on Map

- Decide with Customer best date/time
- Click Yellow Box to Open Appt and Save
- Check DO NOT MOVE

Times and details can be changed while open (F9 Save)

Repeat for all customer's Requiring Appointments

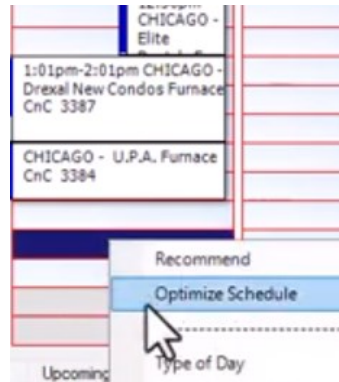
# 5- Go Back To Calls

There will surely be some customer's who you were unable to reach when calling to scheduled require appointments.

Repeat step 2

# 6- Optimize Day

To Optimize Schedule click a blank time on the desired trucks day  
Right Click  
Optimize Schedule  
YES



Note: DO NOT MOVE

Any appointments set to Do Not Move will be left at the specific scheduled time.

Full optimization may not be quite as good because of those appointments, but if the overall process laid out here is followed, it will still be about the best balance possible between pure optimization and meeting the customer's specific needs

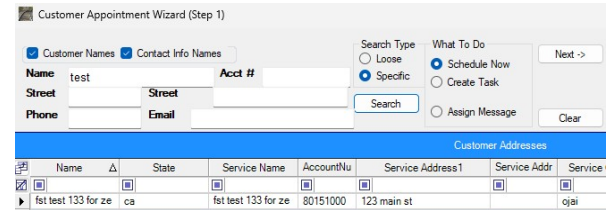
# 7- Taking a Call

If a customer calls to schedule an appointment use the Appt Wizard

Click Clear

Click Schedule Now

Fill in part of the customer name and Search



If customer name is found highlight it and Click Next

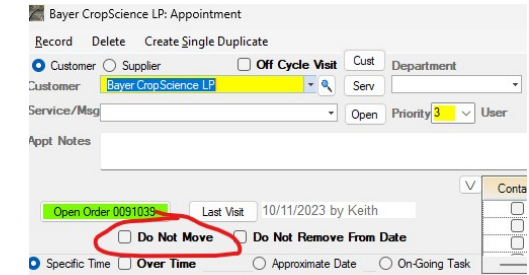
If not found just click Next-> (Fill in New Customer Wizard)

This opens Search Criteria Tab

Click Search

At this point process is the same as in Step 2

Remember to set as Do Not Move



NOTE:

Ultimately you are in control...

If none of the recommended date/times are good for the customer you can always pick a time slot and Double Click it and it will create an appointment for that time slot

HINT:

If a customer calls and needs service today or tomorrow, you can still Search for Recommendations for upcoming days.

Then if you see a day that would be much better than today, you could put them on that days schedule and have your guy in the truck change days on his schedule to run that days schedule instead of todays. Then run todays schedule tomorrow or whatever day you put that customer on. This will help keep travel times down but satisfy the customer's needs.