

Customer Appointment Manager

Downloading the demo of Customer Appointment Manager was your first step to managing appointments with ease. You'll soon discover how quickly you can schedule new appointments, change existing appointments, find open times, print reports and more! To help you optimize the features of Customer Appointment Manager, read this Tips & Tricks guide.

How do I...

Customize the appointment form or customer form?	<p>Use definable fields to store information important to you and your business. Five custom fields can be added to the customer record and five custom fields can be added to the appointment window.</p> <p>Here's how: File > Custom Fields > Add > Select Customer or Appointment form > Enter caption/name > Select data type > Enter field length. Note: if you entered a selection list, you will need to type your selections into the list area.</p>
Print the screen or print appointments in a calendar format?	<p>Print a snapshot of the day or week and share what you see in the appointment scheduling worksheet.</p> <p>Here's how: Select the Day or Week View by clicking on the appropriate icon on the toolbar > File > Print > Choose Same as on screen or One employee per page > Preview or Print.</p>
Create and send customized letters to my customers?	<p>Using Microsoft® Word you can create and customize your own letters populated by various fields from your Customer Appointment Manager database. Invite customers to an open house, send out a special promotion, or request customers who have not scheduled an appointment for some time to come back — the possibilities are endless!</p> <p>Here's how: Tools > Letters > Create/Edit > New > Name the document > Customize your letter with options from the CAM Merge Files dropdown. Don't forget to save your work!</p> <p>To publish letters go to Tools > Letters > Publish > Choose the customer options you need > Select the name of the letter to publish > Click Publish and a Microsoft Word file will open with the published letters > Print the letters or save the file for later use.</p>
View all appointments for a specific customer or all of my customers?	<p>Create a report to view previous appointments, services and preferences for specific customers or to create a list of upcoming appointments for all customers.</p> <p>Here's how: Reports > Appointments by Customer > Select the desired date option or choose a custom date range > Select the customer(s) > Select Status to include on the report > Select additional fields you would like to include on the report > Choose formatting and sorting options > Preview or Print.</p>
Schedule employee days off?	<p>Access Employee Maintenance when planning for regularly scheduled days off (i.e. if an employee has every Monday off). If employee schedules change frequently, simply book an appointment and check the "All day" check box in the appointment form.</p> <p>Here's how: File > Employee Maintenance > Select employee > Click Edit > Work Schedule tab > leave start and end fields blank to indicate day(s) off.</p>
Schedule repeat appointments?	<p>Customer Appointment Manager gives you the ability to schedule repeating appointments for your customers.</p> <p>Here's how: Schedule a new appointment or open an existing appointment > Select Repeat appt > Click Edit > Select the date(s) for the next appointment(s) by clicking within the calendar boxes or choose Daily, Weekly, Monthly, or Yearly to schedule patterns such as every day or every third Monday.</p>
Synchronize with QuickBooks®?	<p>Don't waste time or risk mistakes on data entry. Use the synchronization feature with QuickBooks. When you add customer information in Customer Appointment Manager, it gets added to QuickBooks (and vice versa). You can also import services and employee information. Launch a QuickBooks invoice right from Customer Appointment Manager to save time.</p> <p>Here's how: File > Import from QuickBooks > Import Customers from QuickBooks, Import Employees from QuickBooks or Import Services from QuickBooks > Click Yes > Click OK. After you import your information, turn on the automatic synchronization by going to File > Import from QuickBooks > QuickBooks Connection Options > Check the box to Automatically synchronize customers and services with QuickBooks.</p>
Manage the waiting list?	<p>You'll accommodate more requests and book more business with the Waiting List. Based on date and time ranges, Customer Appointment Manager will instantly tell you if an item on the waiting list can be scheduled. All the information you need to confirm the appointment with the customer is at your fingertips.</p> <p>Here's how: File > Waiting List Maintenance > Add > Complete the Date Time Range tab and the Appointment Details tab. Note: the next time you launch the Waiting List, it will indicate with a "Yes" or a "No" in the Open column if the appointment can be scheduled or not.</p>

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Don't see your question on the list? We're happy to help. Call us: 1-800-874-8801, e-mail us: sales@abs-usa.com, or review Help > Contents within Customer Appointment Manager for answers to your questions.

