



## Mapping Features

### Setting up the Scheduling Map

**Scheduleview® PLUS Map** - Service businesses such as plumbers, lawn care, delivery trucks, etc, may use this Map feature to check addresses when scheduling appointments at the customer's location.

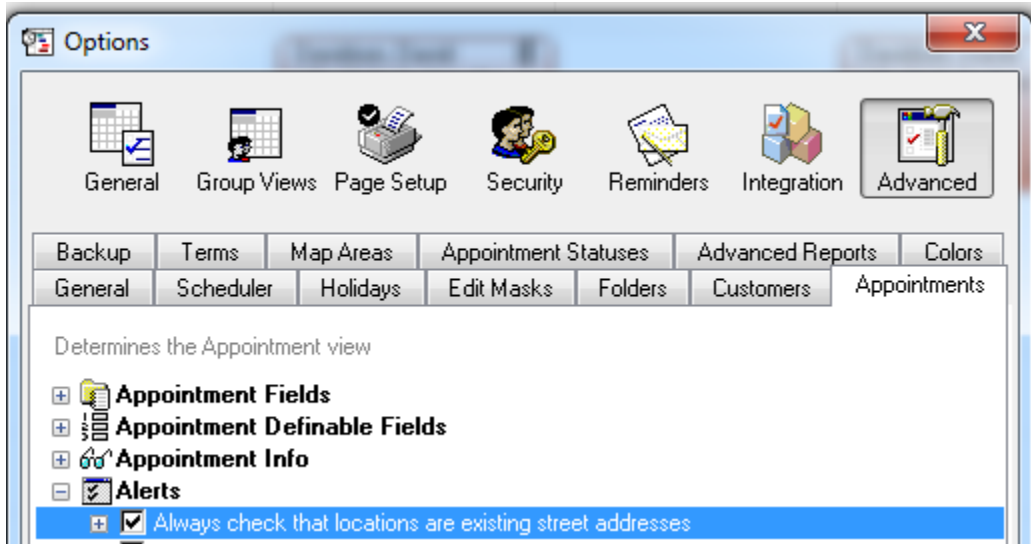
**NOTE: An active internet connection is required to use Scheduleview® Maps.**

The default address for all appointments is "Office"; this is the Company/Business Address entered in Options > General. The customer address will need to be entered to use the Map feature.

Addresses are entered in Customer Information. To enter the fields, edit a customer and fill in the address; required fields are 'Address 1', 'City', 'State' and 'Zip Code'.

Davidson, David		Customer Information	
<input checked="" type="checkbox"/> Active	<input checked="" type="checkbox"/> Allow Calls		
<b>General</b>			
Last Name:	Davidson	E-mail:	daviddavids
First Name:	David	Initials:	
Company:		Service Code:	Taxes
Birthdate:	5/10/1931	Customer Type:	Accounting
Sex:	Male	Provider:	Wallace
Address1:	2146 Kings Hwy	Resource:	
Address2:		Referral Source:	Telemarketin
City:	Fort Charlotte	ID number 2:	
Zip Code:	33980	Social Security #:	444-44-4444
	State:	FL	

The address information can be verified. Go to Options > Advanced > Appointments > Alerts > and choose. "Always check that locations are existing street addresses".



## Using the Scheduling Map

**Scheduleview® PLUS Scheduling Map on the Schedule** - Service businesses such as plumbers, lawn care, delivery trucks, etc, may use the Map feature to view appointments throughout the day, mapped out to the customer's location.

Click "Map" at the top of the schedule for an integrated view. A map will be generated with the appointments flagged at their respective locations. Plan the route for the whole day!

The screenshot shows the Scheduleview software interface. The menu bar includes File, Edit, View, Activity, Window, Reports, and Help. The toolbar contains various icons, with the 'Map' icon highlighted in a red box. The main window displays a map for June 22, 2015, with a sidebar on the left showing a list of appointments. The 8:00 am - 9:00 am appointment is circled in red. A pop-up window for the 8:00 am - 9:00 am appointment is open, showing the appointment details and navigation buttons ('prev', 'next') circled in red. A red circle on the map highlights the appointment flag for 'Mo 22, 8:00 am'.

Click an appointment on the left, or double-click a flag on the map for more detail.

Use the 'Next' and 'Previous' buttons to scroll through the appointments:

In the example below, the boxes show the empty time available before and after the appointment. David Davidson is the first appointment of the day so there is 0 time before, and there are 30 minutes between his appointment and the one for Andy Adams.

Day 2015-06-22, Monday

8:00 am - 9:00 am  
Davidson, David / Wife Melinda does the bookkeeping.  
Out of Office

9:30 am - 10:30 am  
Adams, Andy /  
Out of Office

12:00 pm - 1:00 pm  
LUNCH

3:00 pm - 4:00 pm  
Georges, Grace /  
Office

Week

Monday, 2015-06-22

8:00 am - 9:00 am  
Davidson, David / Wife Melinda does the bookkeeping.  
2146 Kings Hwy, Port Charlotte, FL 33980

< prev 0 min 60 min 30 min next >

Click on the available time, "30 min" in this example. The Open Time Slots window comes up, showing the available time in italics:

Open Time Slots

**Search criteria:**

From Date: 6/22/2015

Until Date: 6/22/2015

Time: 09:00 am - 09:30 am

Duration: 30 minutes

Providers: Dave,

Map Area:

Search in templates only

Days:  Sun  
 Mon  
 Tue  
 Wed  
 Thu  
 Fri  
 Sat

**Suggested time slots:**

Monday, June 22, 2015

09:00 am - 09:30 am

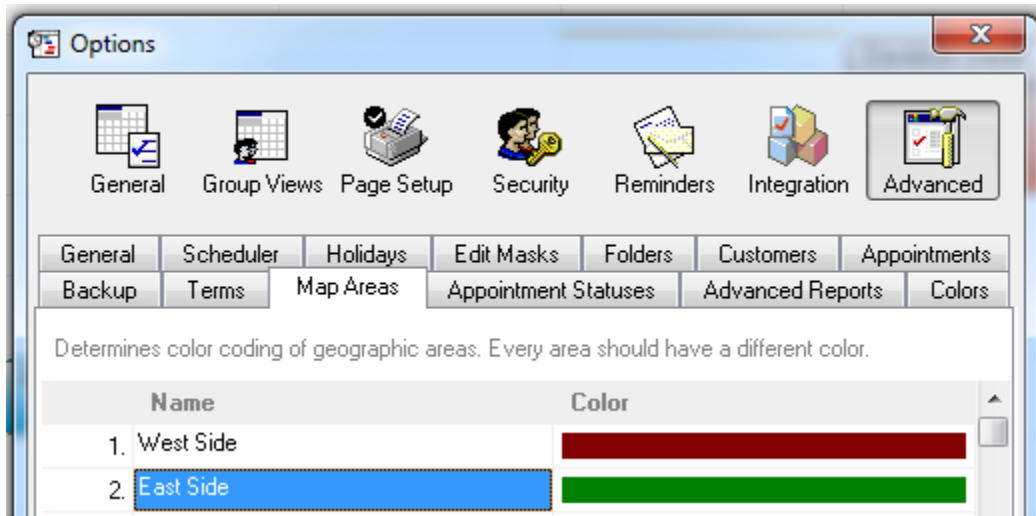
*09:30 am - 10:00 am*

## The Map Area Feature

**Scheduleview® PLUS** Map Area feature helps efficiently plan the workday; most businesses prefer to schedule appointments in the same geographical area together.

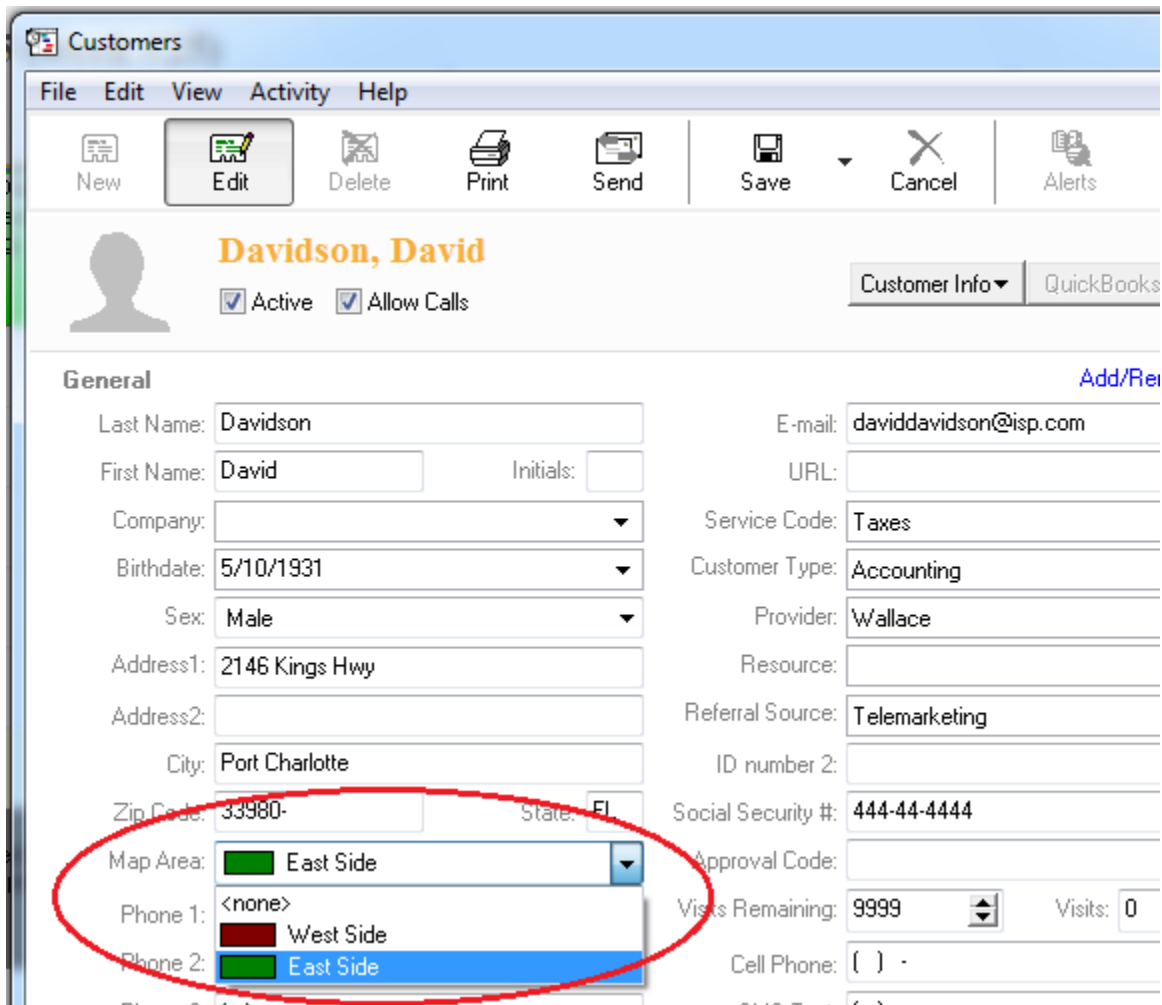
**NOTE: An active internet connection is required to use Scheduleview® Map Area.**

Go to Options > Advanced > Map Areas. Enter a name and color for each area (Color is required)



The default address for all appointments is "Office"; the Company/Business Address entered in Options > General. The customer addresses are entered in Customer Information. To enter the fields, edit a customer and fill in the address; required fields are 'Address 1', 'City', 'State' and 'Zip Code'.

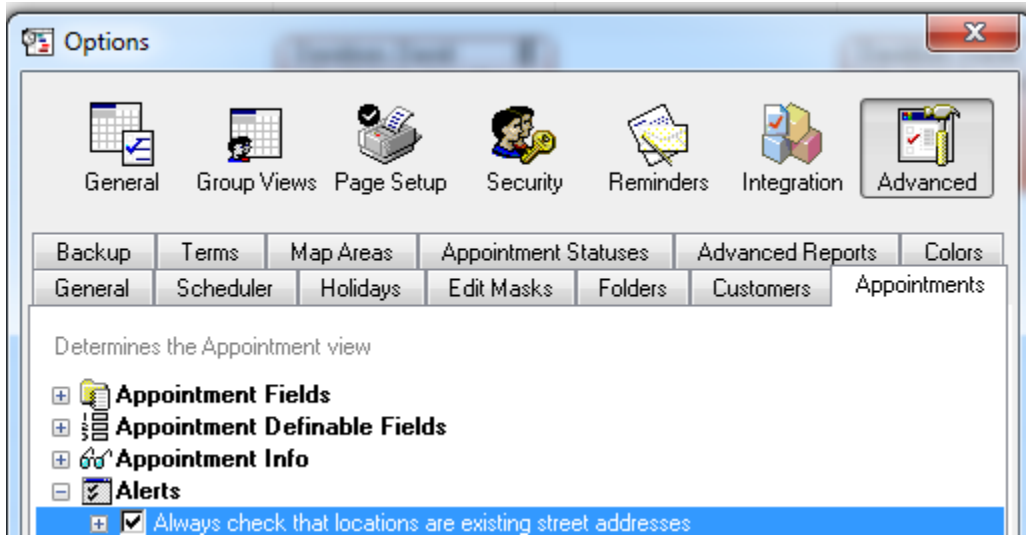
To assign the Map area in Customer Information, click the drop-down to choose one:



The screenshot shows a software window titled "Customers" with a menu bar (File, Edit, View, Activity, Help) and a toolbar with icons for New, Edit, Delete, Print, Send, Save, Cancel, and Alerts. The main content area displays the profile for "Davidson, David", including checkboxes for "Active" and "Allow Calls", and buttons for "Customer Info" and "QuickBooks". The "General" section contains various fields for customer details. A red circle highlights the "Map Area" dropdown menu, which is currently open to show three options: "East Side" (with a green square), "West Side" (with a red square), and "East Side" (with a green square). The "East Side" option is selected and highlighted in blue.

General		Add/Re	
Last Name:	Davidson	E-mail:	daviddavidson@isp.com
First Name:	David	Initials:	
Company:		Service Code:	Taxes
Birthdate:	5/10/1931	Customer Type:	Accounting
Sex:	Male	Provider:	Wallace
Address1:	2146 Kings Hwy	Resource:	
Address2:		Referral Source:	Telemarketing
City:	Port Charlotte	ID number 2:	
Zip Code:	33980-	State:	FL
Map Area:	East Side	Social Security #:	444-44-4444
Phone 1:	<none>	Approval Code:	
Phone 2:	East Side	Visits Remaining:	9999
		Visits:	0
		Cell Phone:	( ) -

The address information can be verified. Go to Options > Advanced > Appointments > Alerts > and choose. "Always check that locations are existing street addresses".

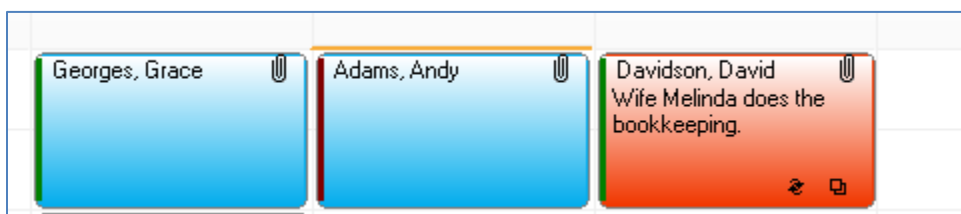


When scheduling an appointment, the Map area will auto-fill; or choose from the drop-down list.

The screenshot shows the 'Appointments' window with the following details:

- Customer:** Davidson, David (checked)
- Phone:** (555)555-4455
- Job:** (empty)
- Status:** Scheduled
- Services:** Taxes, Accounting
- When:** Starts: 6/22/2015 8:00 am, Duration: 1 hour
- Where:** Location: Office
- Providers, Resources:** Dave, Conference Room 1
- Color:** Custom Color 1
- Priority:** Low
- Reminder:** <none>
- Notes:** Wife Melinda does the bookkeeping.
- Map Area:** East Side (selected), <none>, West Side, East Side

A color line will be added on the left-hand side of all appointments with a Map Area.







## The Map Route Feature

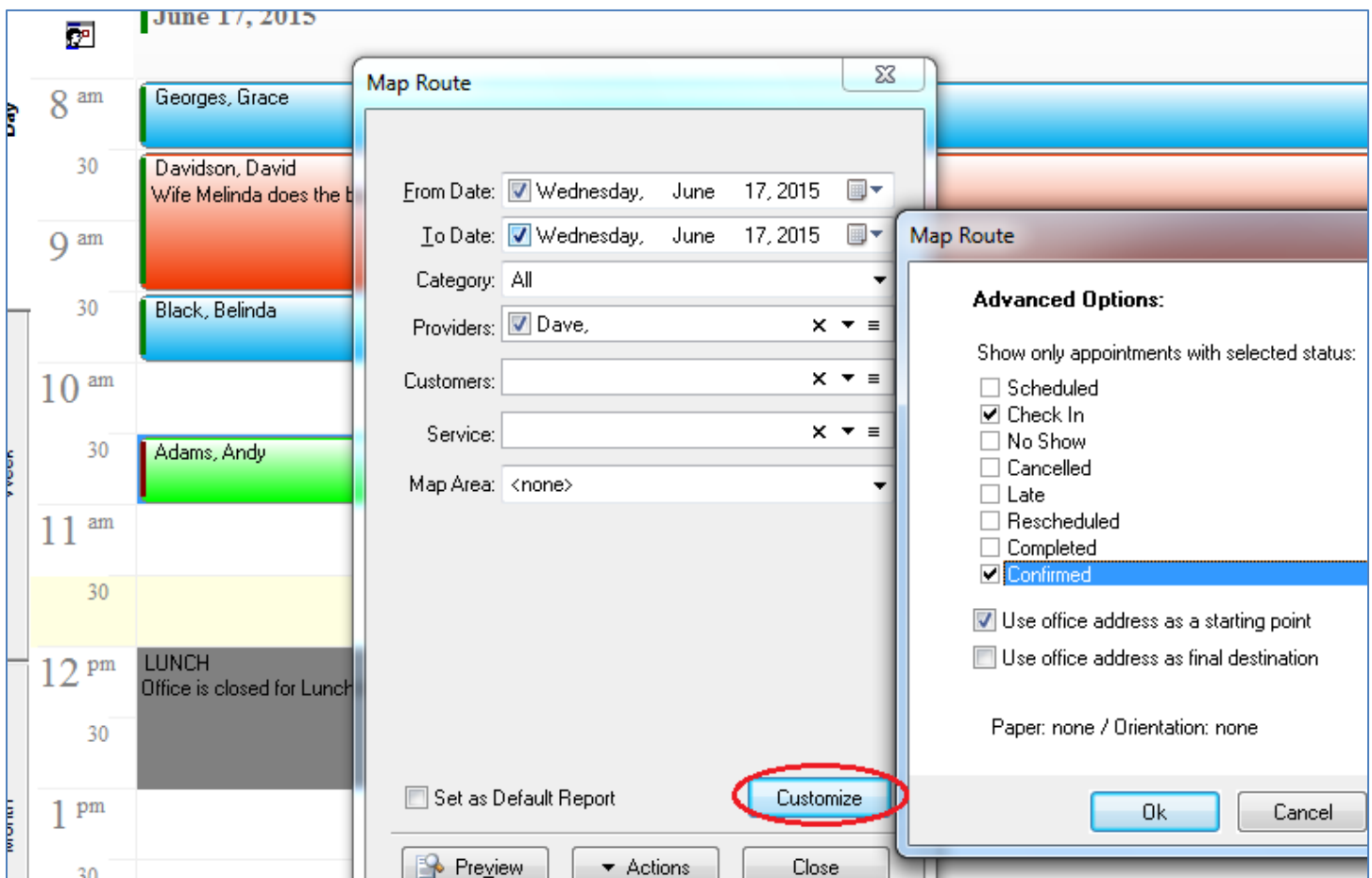
**Scheduleview® PLUS** Map Route feature will put the appointments for the day on a Map. Use this report to print a map outlining the route that starts from the office and goes to each and every appointment for the day.

Click Reports > Advanced Reports > Map Route

It defaults to the information on the screen; for instance, when in a day view for June 17<sup>th</sup>, the report will default to that date. To change dates or edit the criteria click on the  or  buttons.

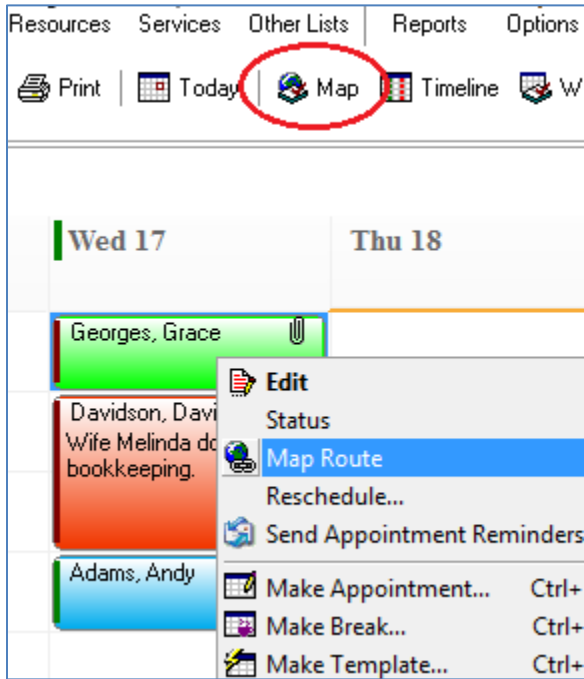
Choose a Map Area if desired. For this example only those appointments with a status of 'Check In' or 'Confirmed' will appear. Also, the office is the starting point, but not the end point – the last appointment will be the end point.

- For this report to work correctly, appointment statuses must be updated throughout the day.

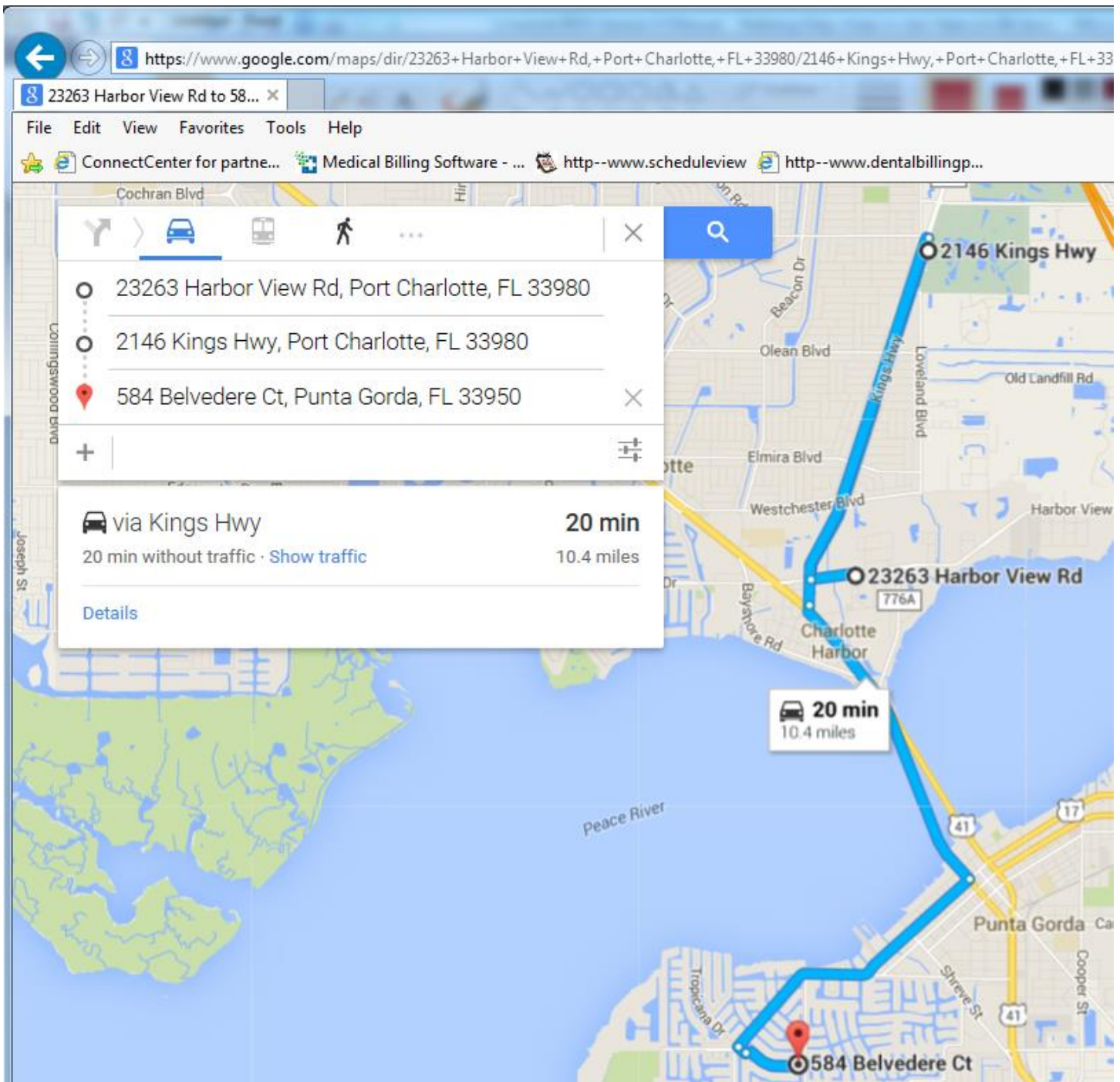


The screenshot displays the Scheduleview software interface for June 17, 2015. The main window shows a day view with appointments for Grace Georges (8 am), David Davidson (9 am), Belinda Black (9:30 am), and Andy Adams (10:30 am). A 'LUNCH' block is shown from 12 pm to 1 pm. The 'Map Route' dialog box is open, showing filters for 'From Date' and 'To Date' (both Wednesday, June 17, 2015), 'Category' (All), 'Providers' (Dave), and 'Map Area' (<none>). A 'Customize' button is circled in red. A secondary 'Map Route' dialog box is open over the main one, showing 'Advanced Options' with checkboxes for appointment statuses: Scheduled, Check In, No Show, Cancelled, Late, Rescheduled, Completed, and Confimed. The 'Confimed' checkbox is checked. There are also checkboxes for 'Use office address as a starting point' and 'Use office address as final destination'. The 'Paper' and 'Orientation' are set to 'none'.

The Map Route feature has been also added to the Right-click menu. Right click any appointment in the day with a map area, choose “Map Route”.



A street map will pop up online, with a list of the addresses on the left and the route marked out. It is an interactive map, with the typical features such as zooming in and out and details. Click an address on the left and click the 'X' to remove it from the route.



NOTE: **Scheduleview**<sup>®</sup>'s Map Route Report is by appointment, not by location. It maps the appointments exactly in order by time of day of the appointment. It does not rearrange the route to map the closest appointments first.