



## Feature Spotlight: Scheduling Manager Web Portal

**Scheduling Manager's** new **Web Portal** is an exciting new way for you, your employees and your customers to make appointments, view jobs and make payments.



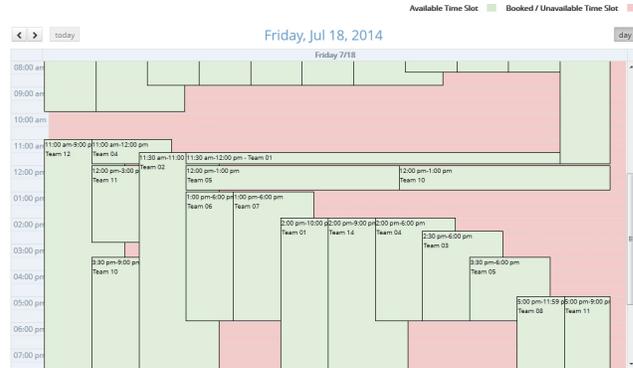
The **Web Portal's** main function is to assist you with organizing information for your customers. Customers can request appointments, to be approved by you, and pay invoices directly. Employees can mark jobs as completed, indicate days and hours they'll be available for scheduling, and make leave requests. The Administrator's suite of tools allows you view all requests by customers and employees to confirm appointments and send messages to your customers and employees.

When your customers log in, they see your company's name, contact information, the next job they have scheduled, and their current account balance.

Your next service info is :		Your current account balance is :	
Job number :	80114		\$125.00
Date :	07/30/2014		
Time :	01:00 PM		
Charge :	\$60.00		
Frequency :	BI-Weekly		
Work to be performed :	General Cleaning		

Your day at the office is hectic and busy, so you may not be able to respond to every customer call. With the **Scheduling Manager Web Portal**, customers can log in and make a request for an appointment. Then, you simply confirm the appointment inside **Scheduling Manager** and dispatch the team. You may be wondering how to manage requests for times that are fully booked. We solved that by making it possible for customers to view all the times you have available.

## Web Portal Availability Calendar



Your clients can check to see if any teams are free and able to meet the appointment time they'd prefer. When customers can see which times your teams will be out on a job, so it keeps them from trying to schedule for a time you can't meet and saves you the hassle of a call or email conversation with the customer to negotiate a better time.

## Web Portal Customer Payments

We make receiving payments easy with the **Web Portal**. Once a job is complete and an invoice is created, customers have the option of paying with a credit card right through the **Web Portal**.

The payment is transferred quickly and securely so you can close out invoices with minimal overhead and transaction costs. This makes the entire process of setting up a job and completing payments incredibly easy and reduces administrative time, saving you money and increasing the amount of business you can do in a day.

**Call now to order!**

## Employee Web Portal Capabilities

Your employees will also have many options when accessing the **Web Portal**. As soon as employees log in, they can see their scheduled jobs for the day.

Job Date	Customer	Start Time	End Time	Team	Work Code	Sched. #	Job #	Status	Complete	View
07/24/2014	Smith, Mary	09:00 AM	10:00 AM	Team 07	General Cleaning	423	79955	Open	<input checked="" type="checkbox"/>	
07/24/2014	Thomas, Sarah	11:00 AM	12:00 PM	Team 07	General Cleaning	568	80007	Open	<input checked="" type="checkbox"/>	
07/24/2014	Booker, Harold	12:30 PM	01:00 PM	Team 07	General Cleaning	371	79933	Open	<input checked="" type="checkbox"/>	
07/24/2014	Aaronson, Lorraine	02:00 PM	03:00 PM	Team 07	General Cleaning	666	80025	Open	<input checked="" type="checkbox"/>	
07/24/2014	Taylor, Mary	03:30 PM	05:00 PM	Team 07	General Cleaning	60	79840	Open	<input checked="" type="checkbox"/>	

After a job is completed, they can close it out so administrators can see which jobs are complete, all without contacting the office directly. This reduces administrative time so your team can focus on other tasks to

**Complete Job**

Job Date:  \*

Start Time:  \*

End Time:  \*

Job #:

Status:

Notes:  \*

Miles:  \*

keep your business running smoothly. We've also added features for employees to request leave and mark their availability which can be approved by an administrator. All of these **Web Portal** features streamline office processes and allow your business to grow.

	Sun 7/20	Mon 7/21	Tue 7/22	Wed 7/23	Thu 7/24	Fri 7/25	Sat 7/26
08:00 am	Submitted Leave - cruise						
09:00 am							
10:00 am							
11:00 am							
12:00 pm							
01:00 pm							
02:00 pm							
03:00 pm							
04:00 pm							
05:00 pm							
06:00 pm							
07:00 pm							

## Web Portal Administrator Access

Administrators have access to all of the same features as customers, employees and more. They can access the schedules of all customers, see all jobs by team for all employees, and acknowledge and approve of job requests, leave requests, and set employee availabilities. The Administrator can also send global messages to all customers to make announcements or to issue notices of service changes.

Thoughtful Systems Web Portal Welcome Admin

---

**Global Message**

Please specify global message below. This message will be shown to every customer on their dashboard when they log into the system.

B I U

To all of our customers,

We are currently offering a special 20% discount for jobs booked in the next week! If you are a recurring customer, this discount automatically applies to you. If you know someone who recently mentioned needing a cleaning service, please let them know about our special offer!

Best,

Timothy Biggs

The overview of all customer and employee data through the **Web Portal** gives administrators quick and easy access to all customer and employee data to make management decisions even easier. We designed the **Web Portal** as an easily accessible management tool for you to use to help run your business.

Administrators can also give access to customers and employees as they request it. When they decide to sign up, the process of scheduling jobs, dispatching teams,

**Edit**

Employee Name:

Start Date:  \*

End Date:  \*

No of Days:  \*

Leave Reason:  \*

Employee Note:  \*

Admin Note:  \*

Status:  \*

and collecting payments becomes much more efficient. The benefits of managing employee timeslots and leave requests from a single interface are undeniable, so we are eager to receive feedback concerning the **Web Portal**. Call or email Thoughtful Systems today to learn more.

**Call now to learn more about your Web Portal options!**