

Price Engines Ltd
Making the most of your lead appointment / callback calendar – a guide.

It's now possible to automatically post all of your lead appointments / callbacks onto a Google Calendar. Google Calendars are free and give you the ability to access your appointment & callback calendar on any PC with internet access.

How to do it:

1. Make sure you have a Google Calendar account which uses your 'Invoice Email Address' as the username. You can access your account details here: https://delivery.priceengines.co.uk/?ref=update_account

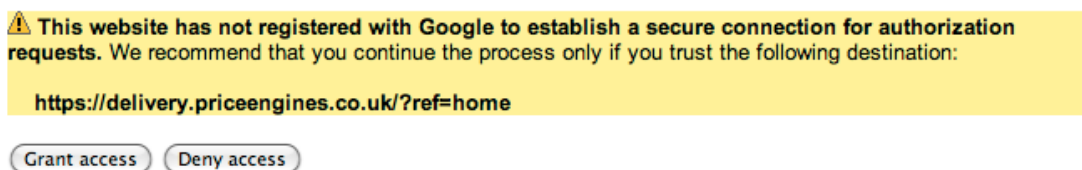
If you don't already have a Google account, you can create one here: <http://www.google.com/calendar/>

 Your Twitter username for LEAD DELIVERY:	<input type="text"/>
Fax for INVOICE:	<input type="text"/>
E-mail for INVOICE:	<input type="text" value="newsletter@priceengines.co.uk"/>
Website:	<input type="text"/>

“Customer Admin Area > Account Details > Update Account – Contact Information”



2. When handling your new leads in the Search Leads > Recent Leads' section: <https://delivery.priceengines.co.uk/?ref=home> you will now see a new link which says: *“Please click here to authorise this site to post appointments to your Google Calendar Account.”* - This will tell Google that you authorise us to post information to your private Google calendar.

We do it this way because it's secure and means we never need to ask you for your Google password. Click on this link. You only need to do this once each session. Click 'Grant access' and Google will return you to your Price Engines Account.



“Click 'Grant Access' to allow your Admin Area access to your Calendar”

3. Book some appointments / diary callbacks. The Booking system is found under the 'call...' option in Search Leads > Recent Leads:

Recent Leads					
	Ref.	Name/Address	Contacts	Details	Actions
	3906506 2010/02/24	Mr. G Tyers, RIPLEY, DE58NU	 01332268198	Bedroom	<input type="button" value="call.."/> <input type="button" value="send.."/>

“The 'call option' in Search Leads > Recent Leads”

Add some call notes - such as the name of the rep who will be making the visit - and select 'appointed' or 'callback' from the 'Select' drop-down menu.

Call Notes	Action
<input type="text" value="Booked with Steve"/>	<p>appointed</p> <p>Set appointment date?</p> <p>FOR: Feb 24 2010</p> <p>AT: 08 00</p> <p>no thanks ok</p> <p>send..</p> <p>finish</p>

“adding some call notes and selecting 'appointed'”

4. Set the appointment / callback date and time, Click 'ok' to fix the time, and then either 'finish' or 'send' if you want to forward a copy of the details to the rep.

The appointment / callback is now added to your Google Calendar where you can keep track of, share, and view your appointments etc. There's also integration between Google Calendar and Google Maps so you can view or print off a street map before visiting.

Viewing your appointment / callback calendar

To view your calendar, from your Customer Admin Area, select Lead Manager > View appointments.

If you're not already logged into your Google Account, you'll see a Google Account login panel. Remember to use the Google Account you created using your Price Engines invoice delivery email address, otherwise it won't work.

You'll then be presented with a standard online calendar which you can move through by day, week or month. Clicking on an entry will show you the full lead details.

For more information or help in using your Customer Admin Area calendar – please contact Price Engines Ltd on 01332 297472 or email sales@priceengines.co.uk.