**Step 1:**

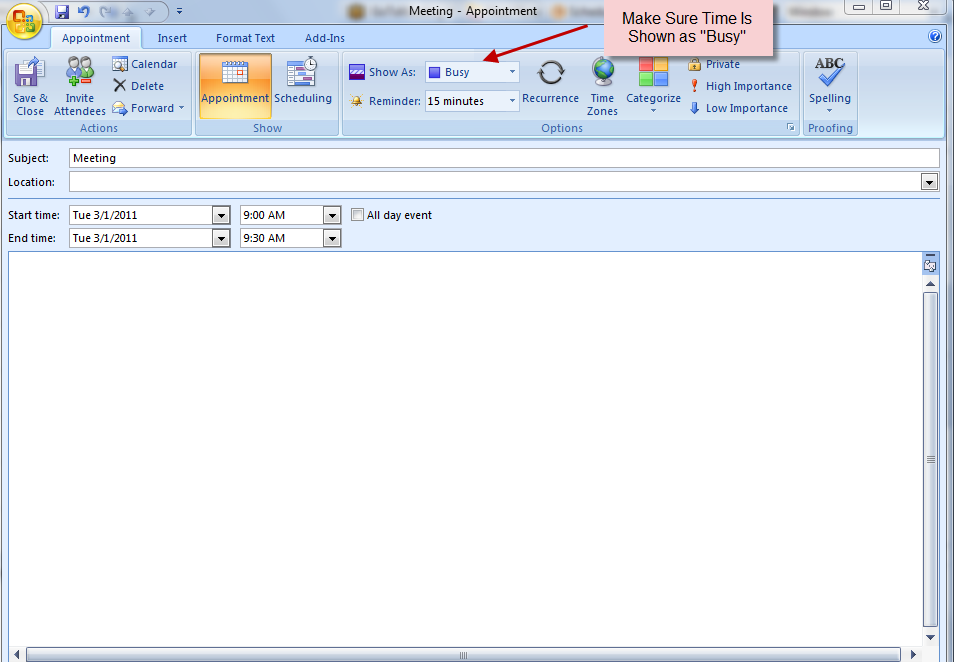
**Make sure each user has their own Outlook setup on a separate computer.**

**Go to Admin Tab and Enable Outlook Syncing  on the Setup Menu---Sync Outlook to only 1 Computer**

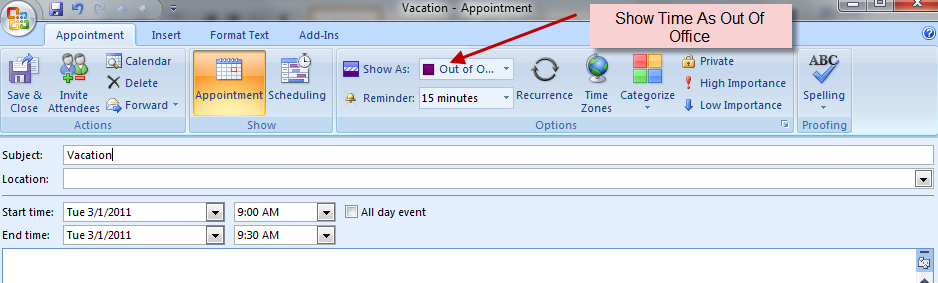
**Step 2:**

On your local version of Microsoft Outlook add any/all **non-customer** related schedule items that you have (all customer related activities must be booked on InspireNet Calendar or InspireNext).

\*For regular meetings and appointments (events that are less than a full day):



For all day events or out of office time (like vacations):

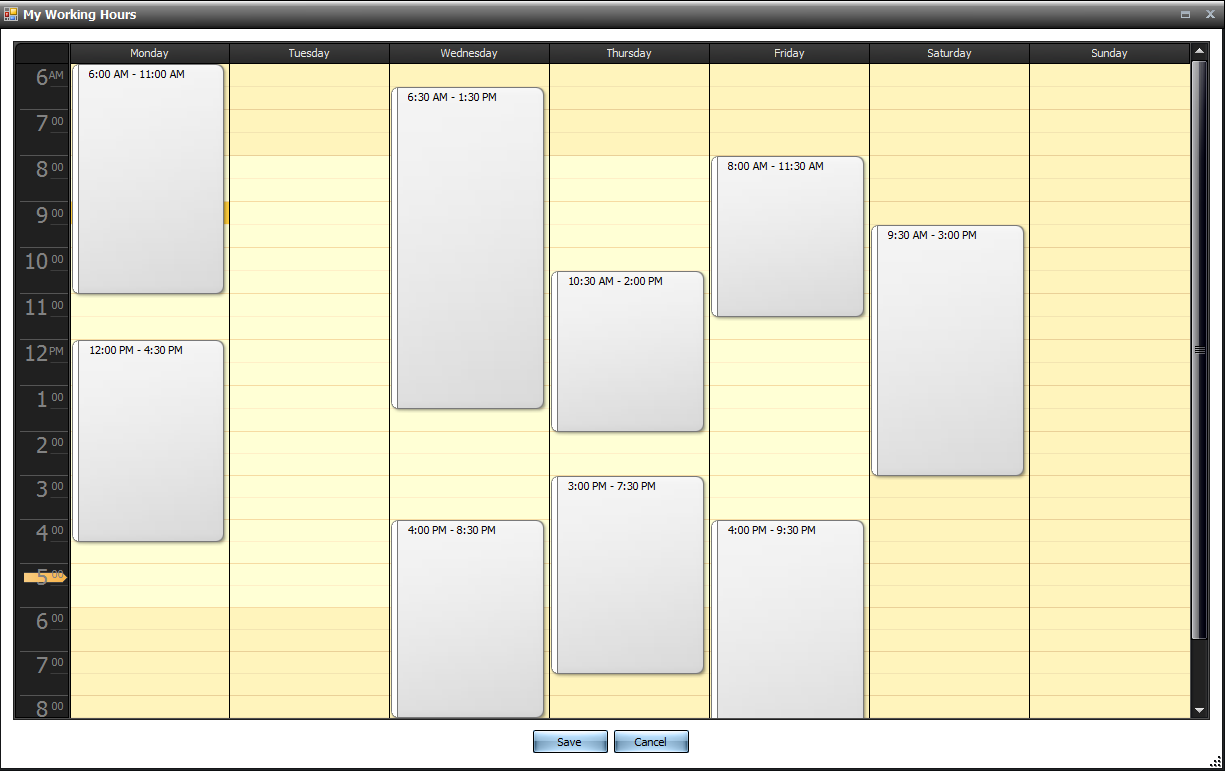


Note: The InspireNet Calendar Does Not Register Recurring Appointments. You will need to simply exclude any recurring appointment times from your “free slots” in the next step

**Step 3:**

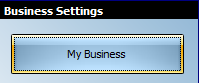
Set up your working hours and business rules:

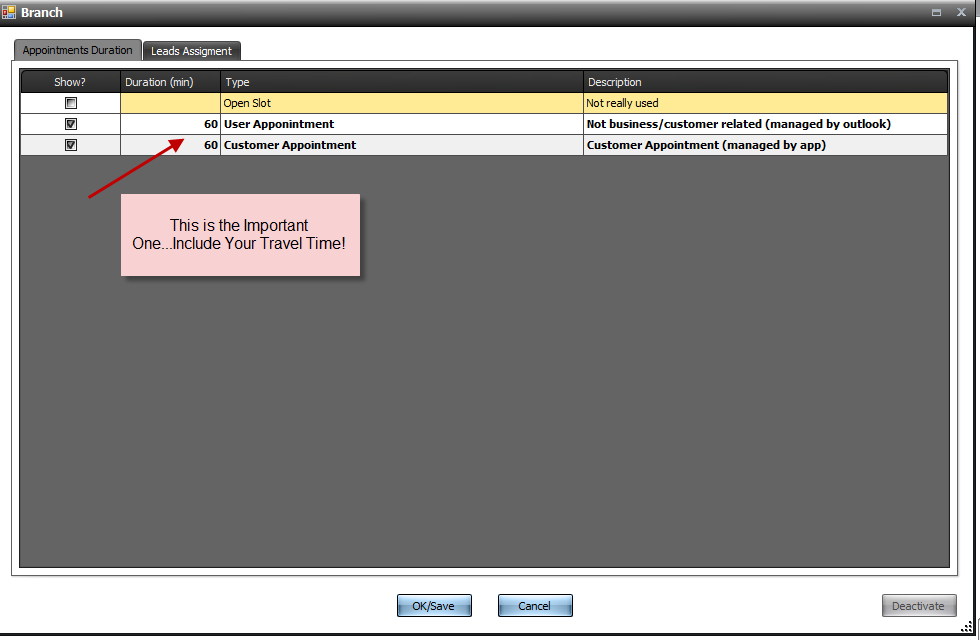
From the Admin Tab Click on My Appointment Hours



Drag a block of time and click enter to add a period of time that you are available for appointments. You can drag these blocks around as needed. (Note, you will set appointment duration in the next step, so if you have an 8 hour window of appointment time, you needn’t break it up into smaller sections…just include the whole block of time.)

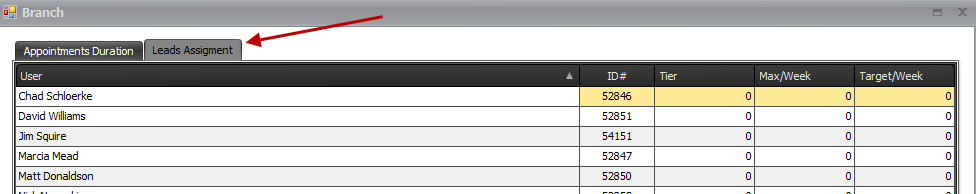
**Setting your appointment length and lead balancing:**

****



* First set duration of customer appointments, remember to include travel time.

Then set up your lead balancing plan:



**Explanation:**

There are 3 different things to consider for each design associate:

1. Target # of Leads Per Week
2. Maximum # of Leads they can Handle Per Week
3. Tier

**Target/Week:**

This should be the # of leads that you want this design associate to receive weekly on a regular basis. This # will also be used to figure out priority…for example:

If Jane has a target of 8 leads per week and Joe has a target of 4 leads per week in the system…If 12 leads come in over the course of the week, Jane will receive 8 of them and Joe will receive 4.

**Max/Week:**

This should be the maximum each design associate can handle. The system will stop sending leads once it hits the design associate’s maximum…

**Note:** One of your staff (either you as the owner, or your lead sales person) should have no maximum entered, this way if all other sales people are filled up, the leads will continue to flow.

**Tier:**

The system will provide leads to everyone on tier one (up to their maximum) prior to providing any leads to someone on tier 2. This is used primarily for overflow leads.

Example: As the owner, I want my design associates to each hit their maximum leads per week before I receive any. I will set myself up as Tier 2 and they will be fed with their max leads before I receive any. This could also apply to a project coordinator that does a bit of sales.

Example of how this could look:

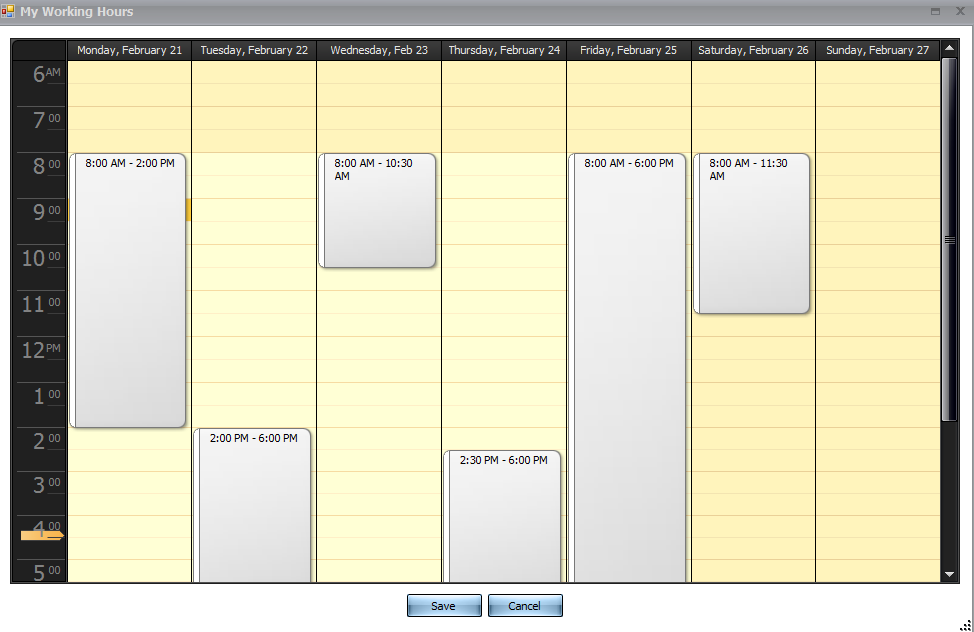
|  |  |  |  |
| --- | --- | --- | --- |
| User | Tier | Max/Week | Target/Week |
| DA 1 | 1 | 11 | 8 |
| DA 2 | 1 | 8 | 5 |
| Owner | 2 | 0 | 0 |

In this example,

* As the leads flow in, DA 1 would receive 8 of the first 13 leads.
* The system would then continue to hand out the leads on a pace of 8 to 5 in favor of DA 1
* When DA 1 reached their maximum DA 2 would receive leads up until their max.
* Then the user on Tier 2 (the owner) would receive leads

**Setting up working hours:**

Click on My Working Hours:



You are now setting up your general schedule for when you are available to have customer appointments. For example, you may do appointment Monday-Thursday 10:00 AM-6:30 PM. Wednesday evenings 7:00-9:00 and Saturdays 11:00-2:00 PM…simply select the time period for which you want to be available with your cursor and drag until you have the correct duration and hit the enter key.

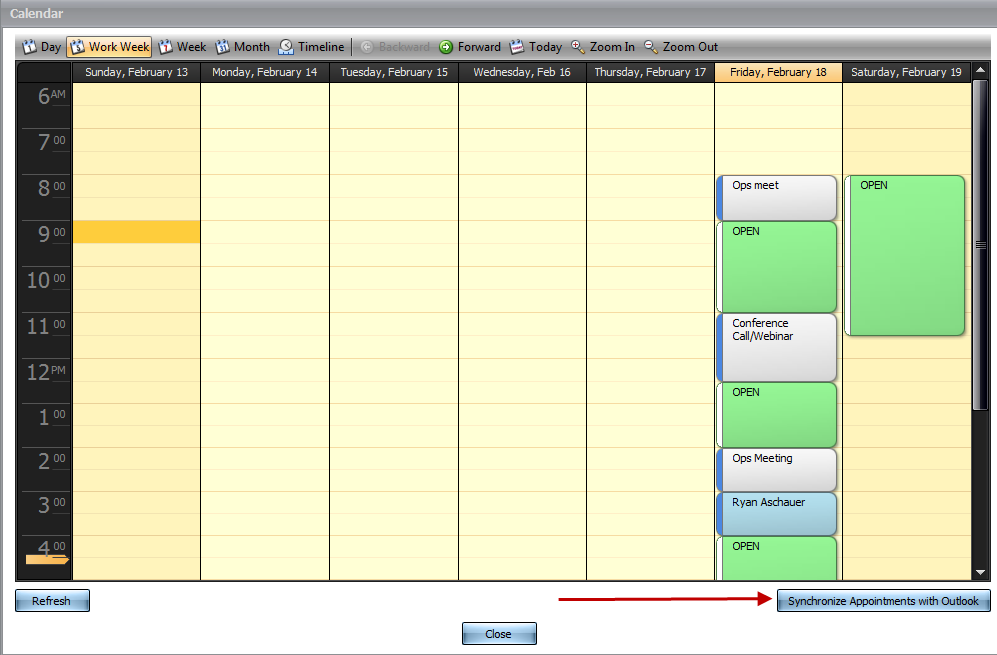
Note: You will generally only need to set this up once, as daily exceptions to your schedule will be managed with Outlook. If you have a structural change to your work week (for example, you decide to no longer offer Saturday appointments, you would come back here to delete that time slot.)

Remember to Click Save when you are done!

**Final Step:**

**Synchronize with Outlook**

Each time you log in and out of the system it will sync with your Outlook calendar. You can also manually sync by visiting your calendar and clicking the sync button.



Very Important Note: Synchronize often! Your InspireNet calendar is only as accurate as its last sync. Make sure that you are syncing at least once per day.