Allpro SchedulePro

Software Brochure

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Provided By:

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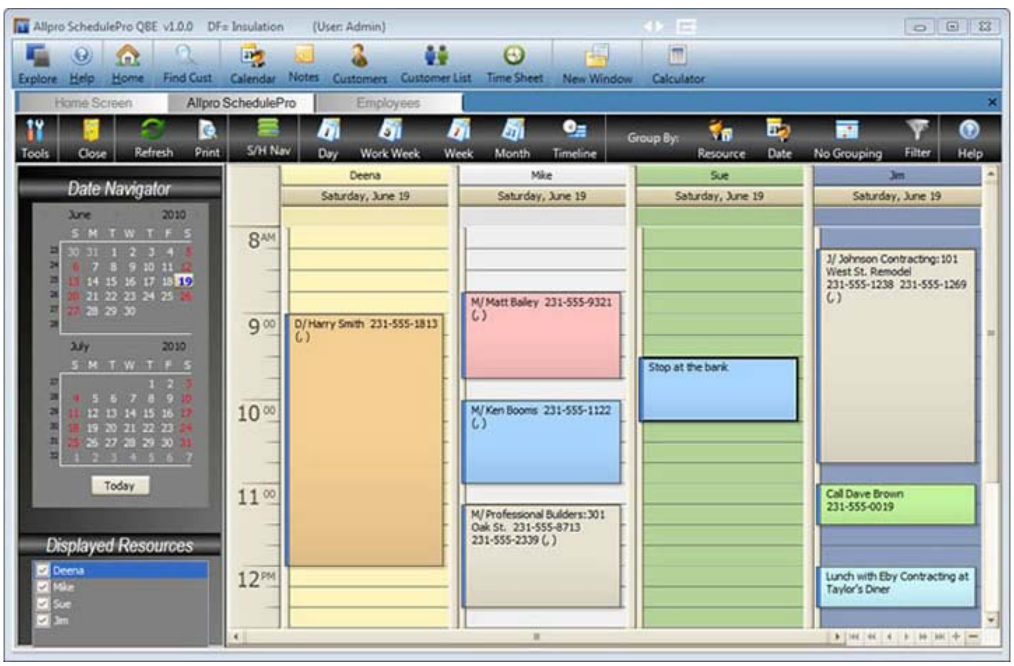
Viewing the Multiple Resource Calendar Grouped by Resource

While *Allpro SchedulePro* allows you to manage several aspects of your business, the calendar control is of course the most useful feature.

- Create detailed schedules
- View your schedule in the Day, Work Week, Week, Month, or Timeline View
- Create recurring appointments
- Maintain multiple calendar resources (Office Staff, Estimator, Equipment Rentals, etc.)
- View the schedule for each resource or merge all resources into one calendar
- Set Alarm/Reminders so you never miss an appointment
- Drag appointments from one calendar to another
- Print calendars in any view to take on the road

The image below displays the *Allpro SchedulePro* calendar in the Day - Grouped view. The Day View allows you to view appointments for each time slot. You will notice that there is a separate calendar for each resource. A resource can represent a person, crew, room, piece of equipment, or any other item that you may need to manage a schedule for. *Allpro SchedulePro* allows you to create an unlimited quantity of resources. You can display all resources or you can choose to view only selected resources.

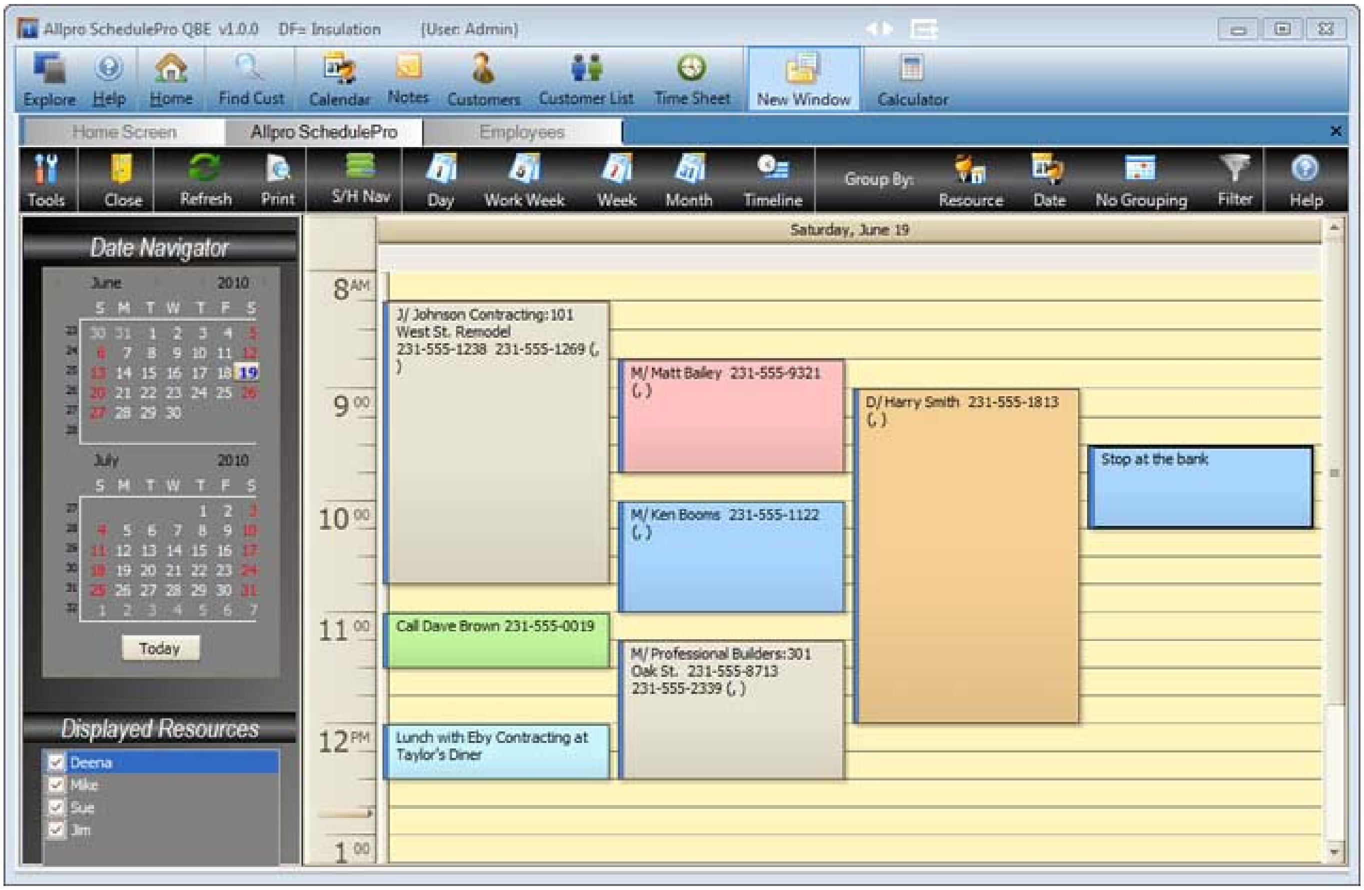


This view makes it easy for you to see what each resource has scheduled for any given day.

To create new appointments with the **Scheduling Software** double-click on the calendar and the Appointments Dialog box will be displayed. You can move appointments by dragging appointments from one location on the calendar to another with your mouse. You can also create copies of appointments by holding down the *Ctrl* key on your keyboard while you drag appointments from one location on the calendar to another with your mouse.

Viewing the Multiple Resource Calendar with No Grouping

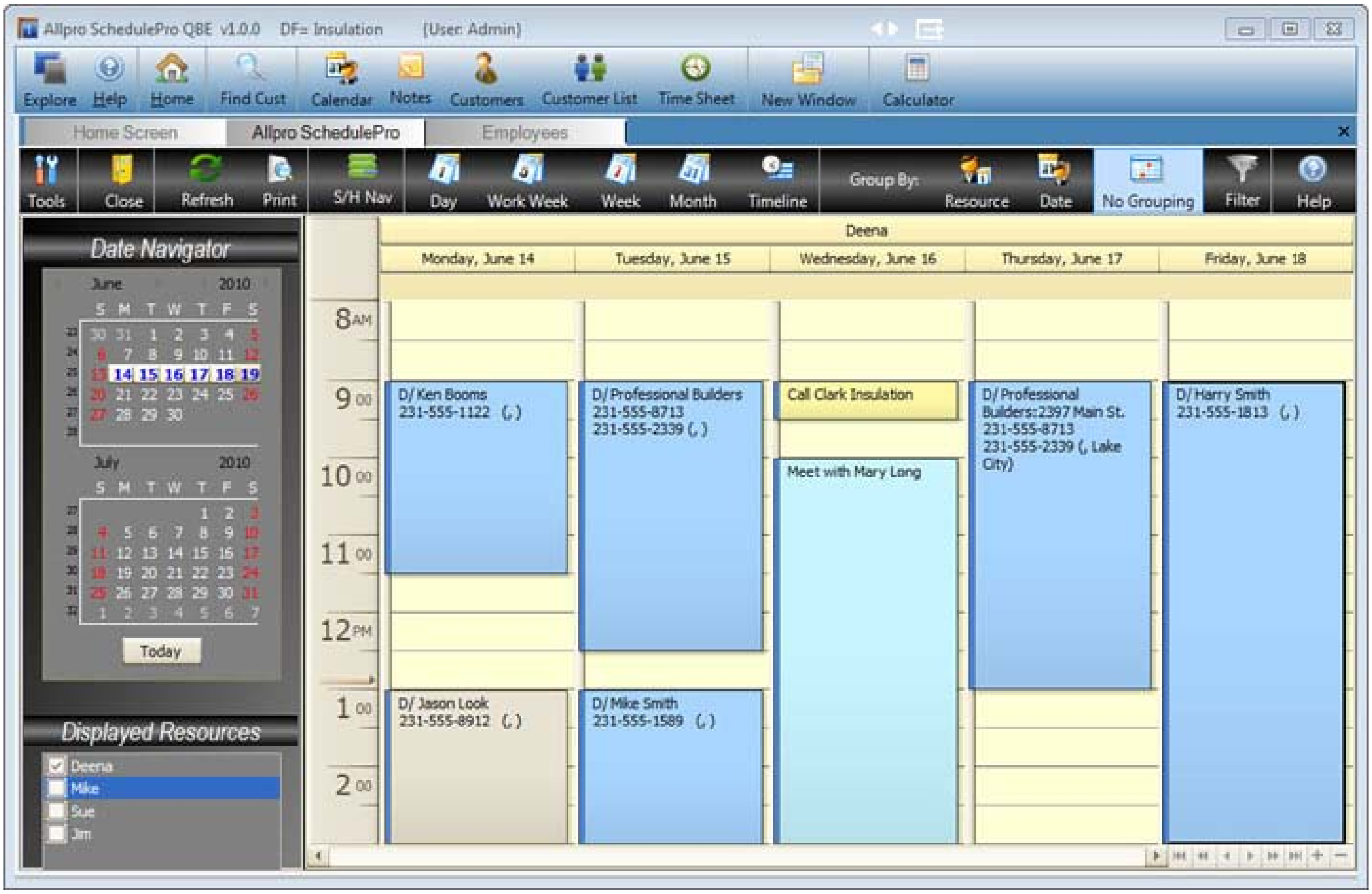
The image below displays the *Allpro SchedulePro* **Calendar Software** in the Day - No Grouping view. This view is very similar to the previous view except you will notice that all the appointments for each resource are displayed on the same calendar. All of the available views allow you to group by Resource, Date, or No Grouping.



This view allows you to easily see the full schedule for your entire company in one place.

Viewing the Work Week Calendar

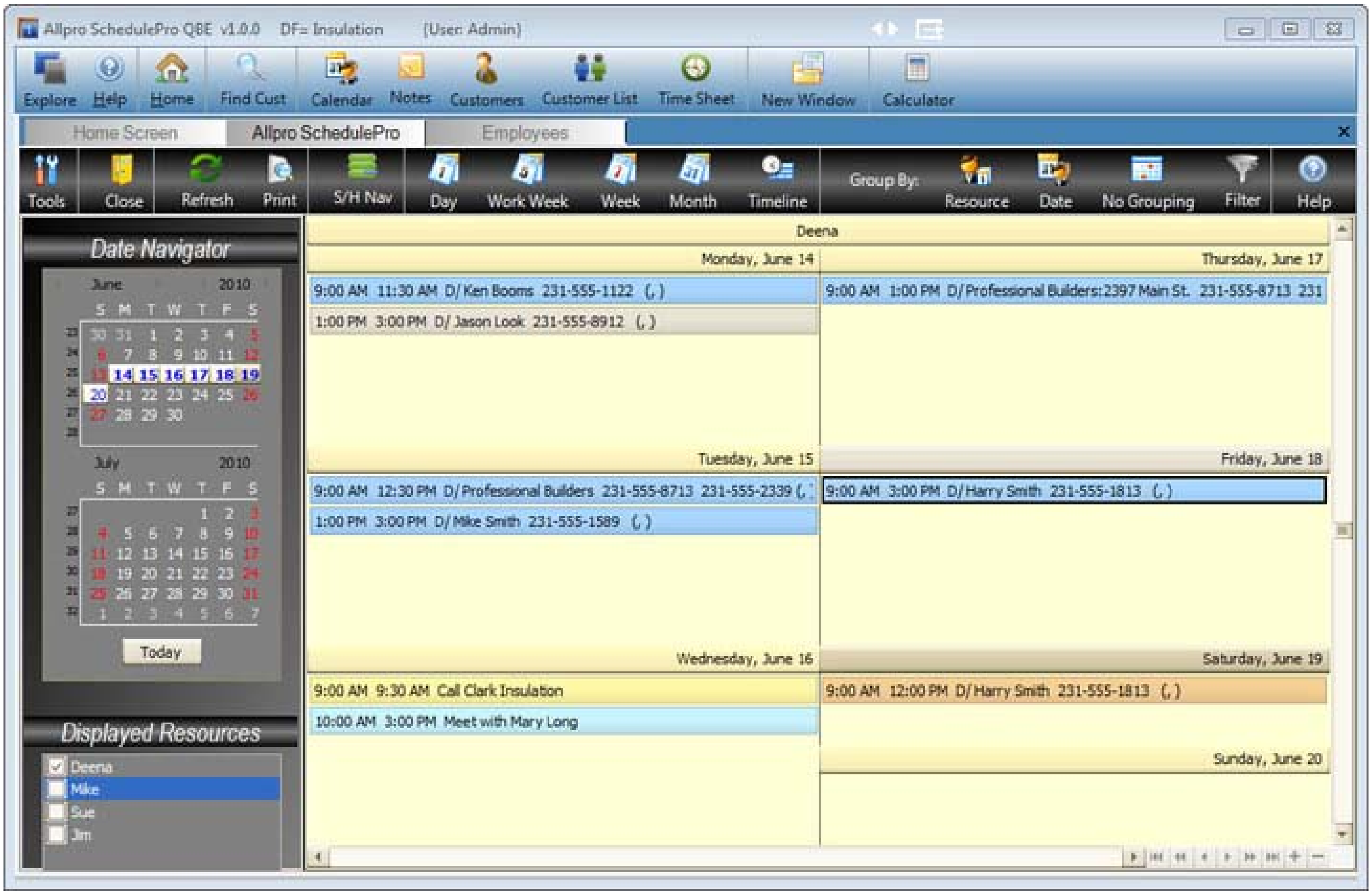
The image below displays all the appointments for the "Deena" resource in the **Scheduling Software** Work Week View. This view also allows you to view appointments for each time slot.



This view is useful if you want to view the work week's schedule for a particular resource. The Work Week view is also useful when you are scheduling appointments to make sure you don't accidentally create any scheduling conflicts.

Viewing the Week View Calendar

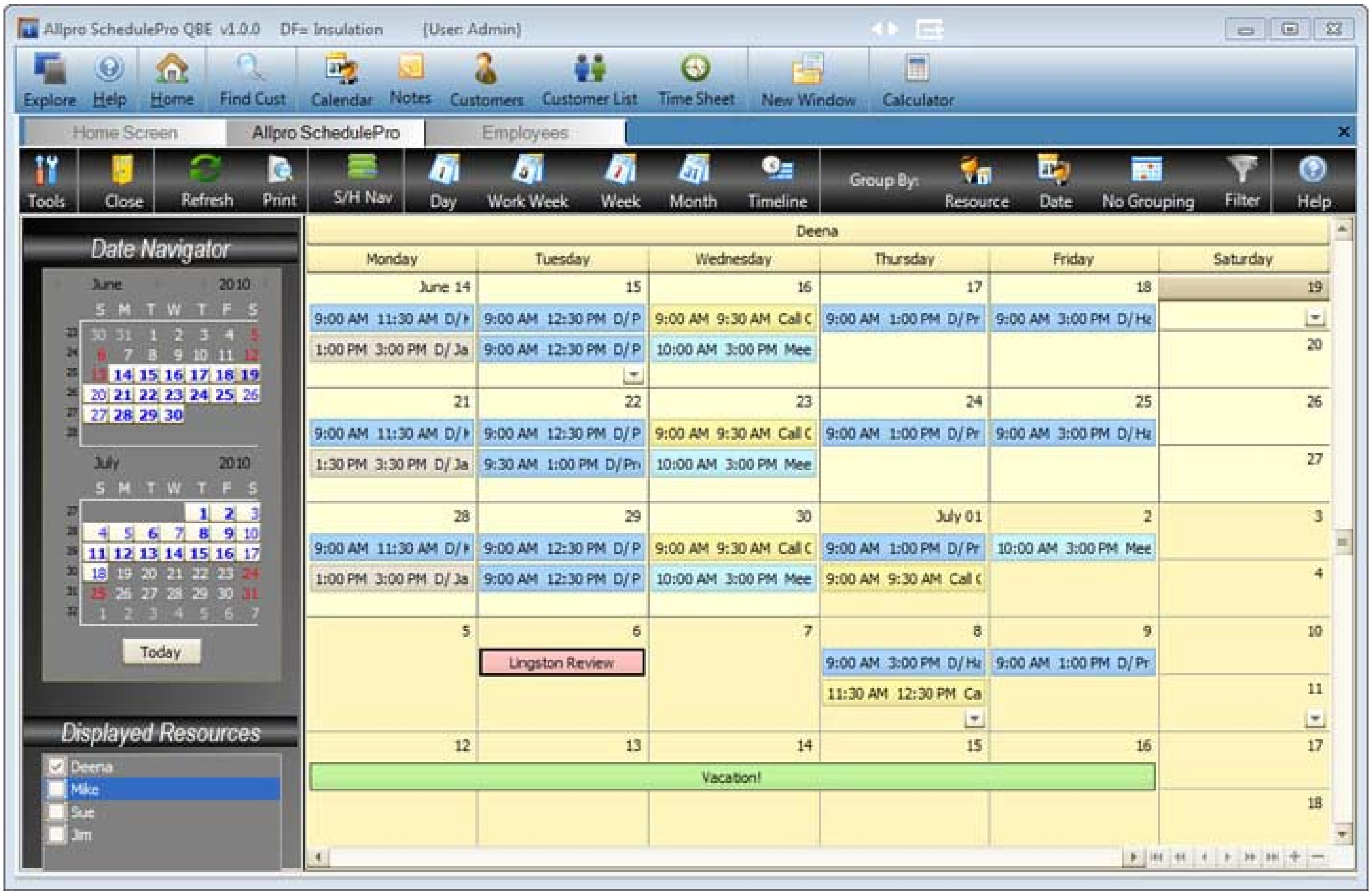
The image below displays all the appointments for the "Deena" resource in the **Scheduling Software** Week View. This view allows you to view appointments for the entire week.



This view is useful if you want to view the week's schedule for a particular resource. The Week view is also useful when you are scheduling appointments to make sure you don't accidentally create any scheduling conflicts.

Viewing the Month View Calendar

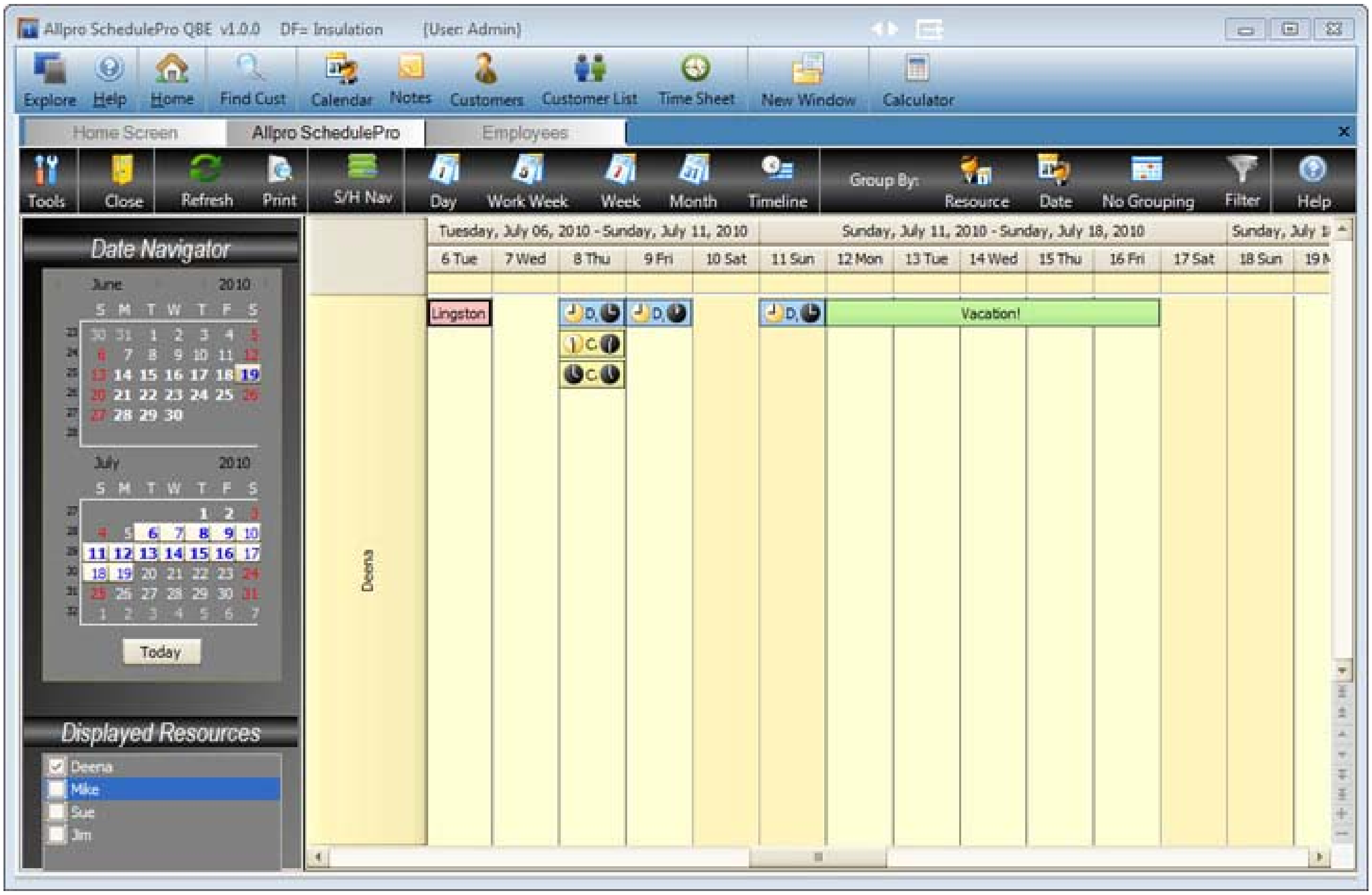
The image below displays all the appointments for the "Deena" resource in the **Scheduling Software** Month View. This view allows you to easily look at all the appointments for the entire month.



This view is useful when you are looking for openings in a large time period.

Viewing the Timeline View Calendar

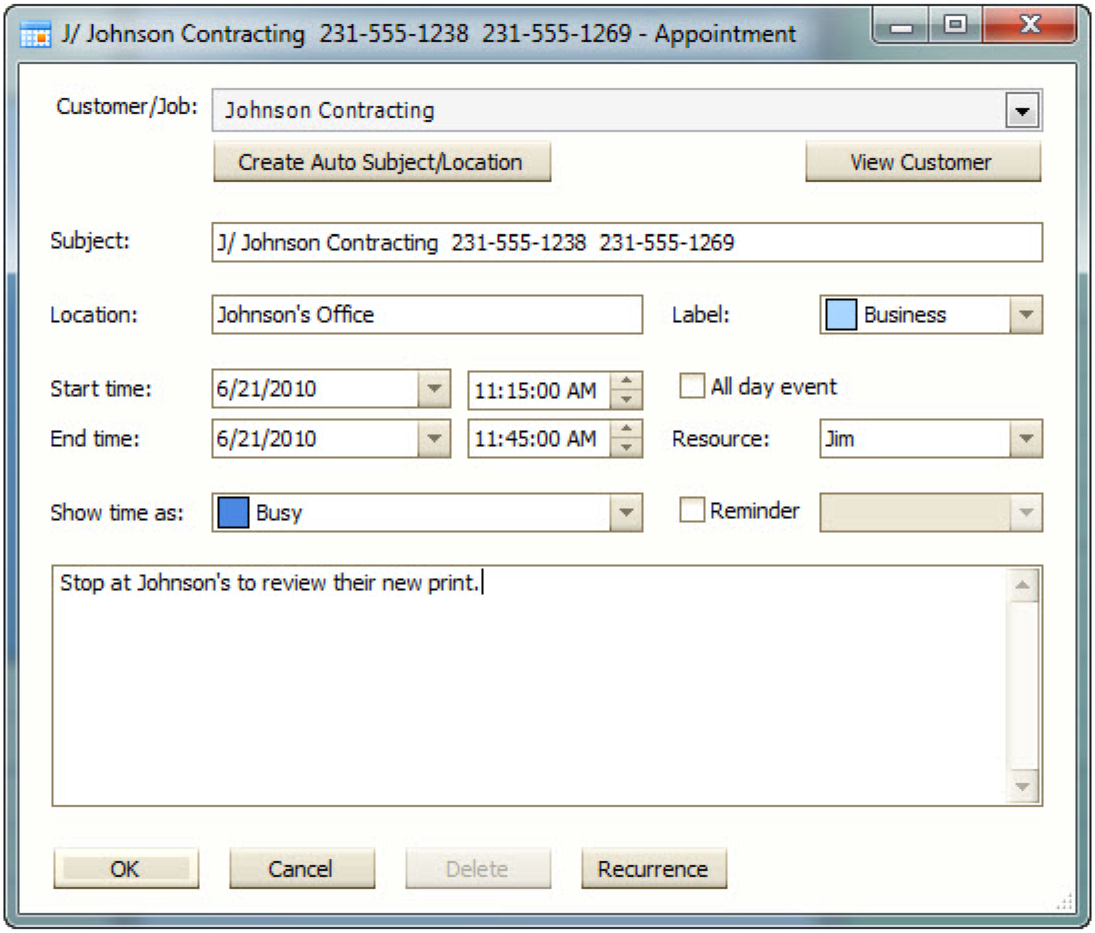
The image below displays all the appointments for the "Deena" resource in the **Scheduling Software** Timeline View. This view allows you to easily look at all the appointments for an extended period of time.



This view is especially useful if you work on larger projects that extend over a large period of time.

Viewing the Appointments Dialog Form

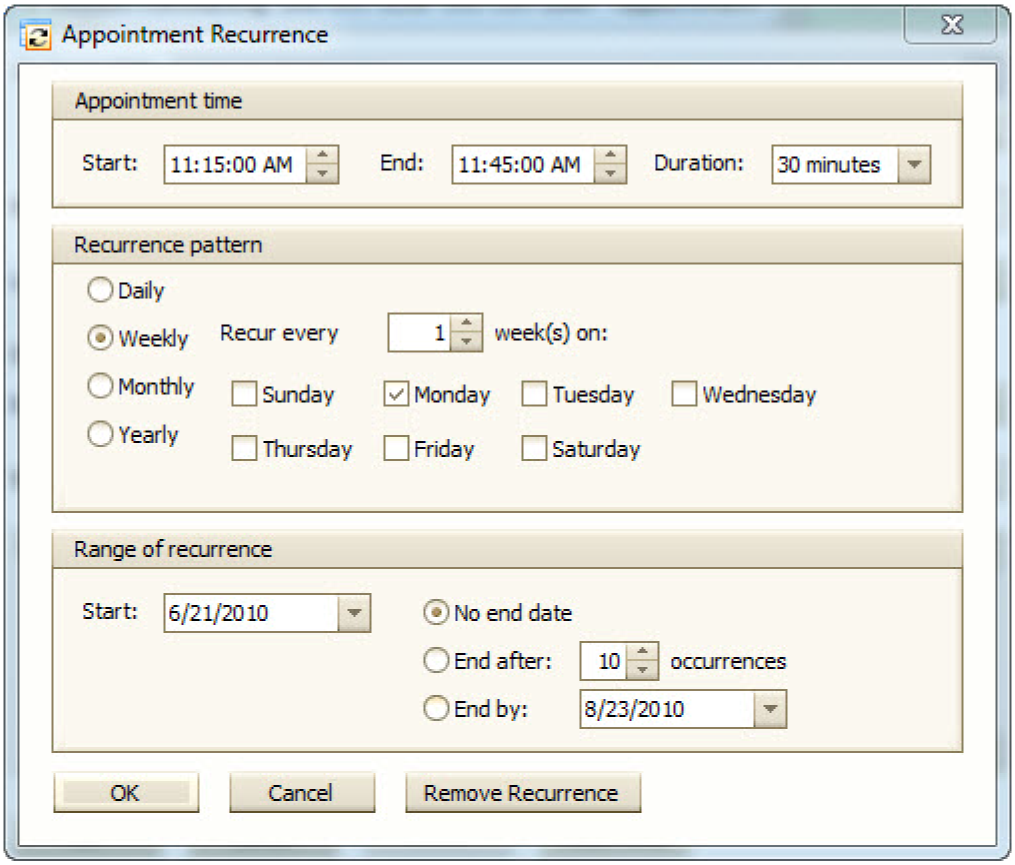
The image below displays the **Calendar Software** Appointment dialog form. This form is displayed when you double-click on the time slot you would like to create an appointment for. The Appointment Dialog form is where you actually create your appointments. This form not only allows you to create appointments but you can also select an existing Customer and or Job from the dropdown list that you would like to associate the appointment with. This feature allows you to easily view the entire schedule for any given customer and or job.



Better Integration! You simply select the Customer/Job you would like to schedule and then select the "Create Auto Subject/Location" button. All of your job location and contact information will automatically be pulled from the Customers form so you do not have to reenter all of this information on your calendar. This allows your calendar to have all the information needed when printing or viewing appointments. You will also be able to view the full schedule for a specific job from the Customers form. The best part is there is no double entry!

Viewing the Appointment Recurrence Form

The image below displays the Appointment Recurrence form. The Recurring Appointments Dialog is displayed when you select the *Recurrence* button from the Appointments Dialog form. This form allows you to create recurring appointments to help organize appointments that appear on a regular basis. For example, you could create a separate calendar Resource for all your monthly bills. You could then create a recurring appointment for each bill's due date so you never forget to pay a bill on time.



Allpro SchedulePro provides you with far more than just your standard calendar features. There are literally limitless uses for this **Scheduling and Task Management Software**.

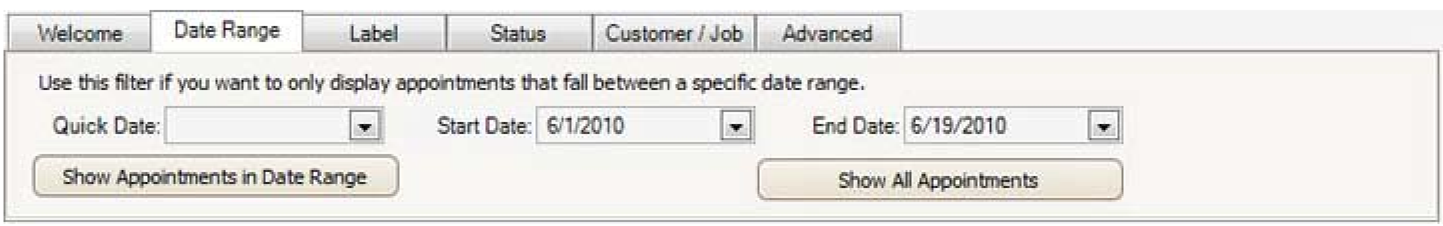
Filtering Appointment Data

Allpro SchedulePro provides you with several powerful ways to filter your calendar data so you can easily find what you are looking for.

The Filter panel is displayed when you select the *Filter* button from the main toolbar. There are five tabs which provide you with different methods to filter your data.

Date Range Filter

The first filter tab is the Date Range tab. By default only appointments that fall between the default date range will be loaded into the Calendar. This feature will greatly improve the performance of the **Calendar Software** because old past appointments that are no longer relevant will not be loaded. The default date range is based on the Previous Days Qty and the Future Days Qty values you enter on the Options tab of the Company Setup form. You can adjust the dates on the Date Range tab and select the *Show Appointments in Date Range* button to adjust the current calendar filter. You can also select the *Show All Appointments* to remove the filter and load all appointments into the calendar. You can also use the Quick Date combo box to automatically adjust the Start Date and End Date based on a specific parameter (example: Month will set the date range to include appointments for the current month).



Label Filter

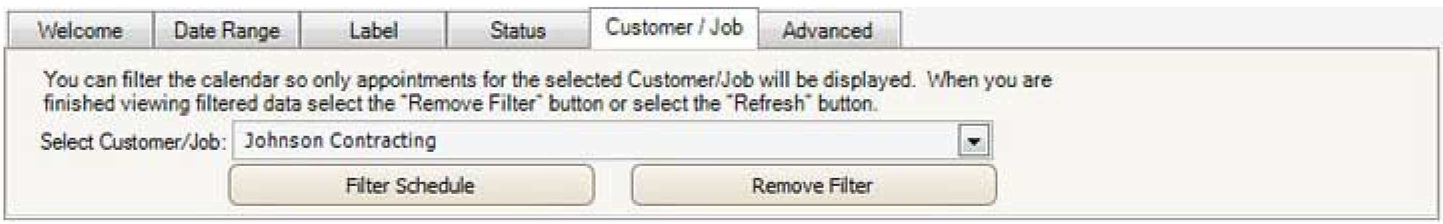
The second filter tab is the Label tab. When you create an appointment you can select a specific Label for the appointment. For example, you could label certain appointments as "Important". Each label will have a specific color assigned to it so you can look at your calendar and easily find all "Important" appointments. You can define your own labels on the Calendar Options form. The Label filter allows you to select a specific Label and only appointments that have that Label will be displayed on the calendar. To remove the Label filter select "All Labels" from the *Filter by Label* dropdown list.

Status Filter

The third filter tab is the Status tab. When you create an appointment you can select a specific Status for the appointment. For example, you could assign certain appointments a status of "Out of Office". You can define your own statuses on the Calendar Options form. The Status filter allows you to select a specific Status and only appointments that have that Status will be displayed on the calendar. To remove the Status filter select "All Statuses" from the *Filter by Status* dropdown list.

Customer / Job Filter

The fourth filter tab is the Customer / Job filter tab. To create this filter you simply select the Customer/Job you would like to filter by from the dropdown list and then select the *Filter Schedule* button. Then when you view the calendar you will notice that only appointments for the selected Customer/Job will be displayed. This feature is very useful if you are having a hard time finding a Customer/Job on the schedule. You can choose to display the Month view and easily locate the required appointments. To remove the filter select the *Remove Filter* button.



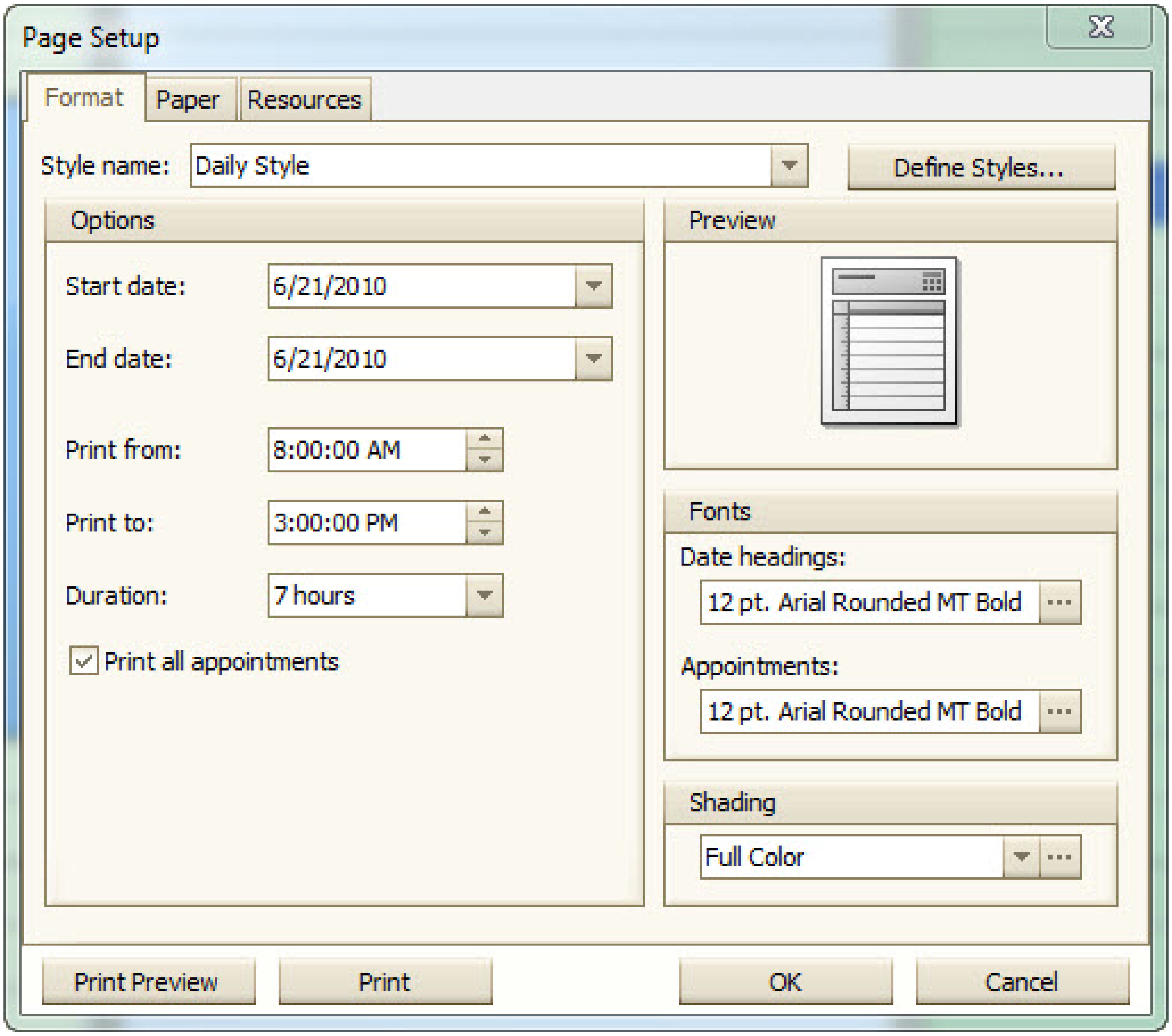
Advanced Filter

The fifth filter tab is the Advanced tab. The advanced filter tab allows you to create a very specific filter which allows you to find appointments in an almost unlimited quantity of ways. In the example below, Location was select as the field to filter by. Equals was selected as the method of searching. Other examples of methods would be "Starts With, Contains, Greater Than, etc.). "Hilton Center" was entered as the search criteria. With this filter created if you were to select the *Apply Filter* button only appointments that contain the text "Hilton Center" in the Location field will be displayed on the calendar. Advanced filter allows you to create very specific filters so you can find exactly what you are looking for. To remove the advanced filter select the "X" to the right of the filter and then select the *Apply Filter* button.

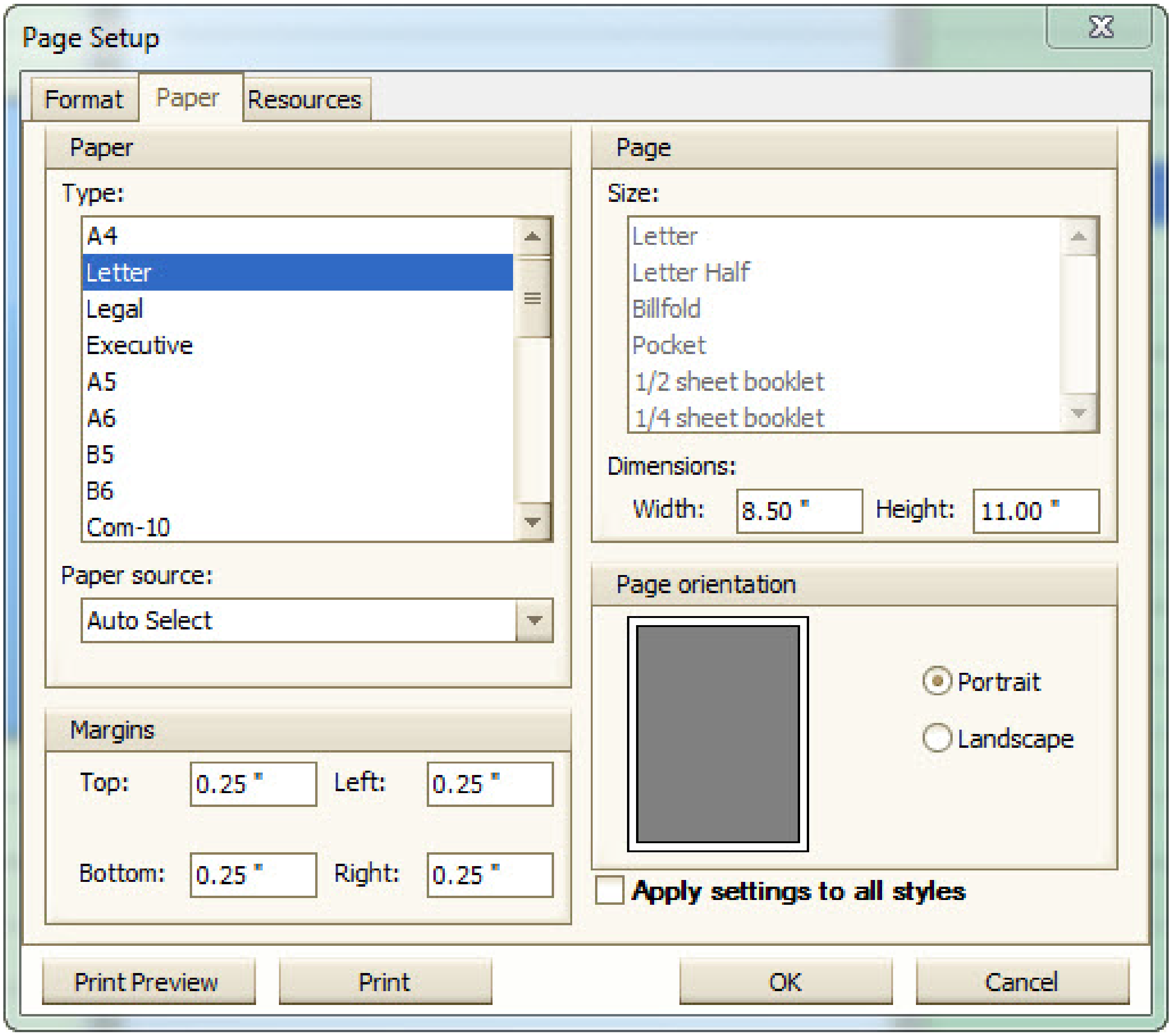
Through all the various powerful searching and filtering options this **Scheduling Software** makes it extremely easy to find the appointments you are looking for.

Printing Calendar Data

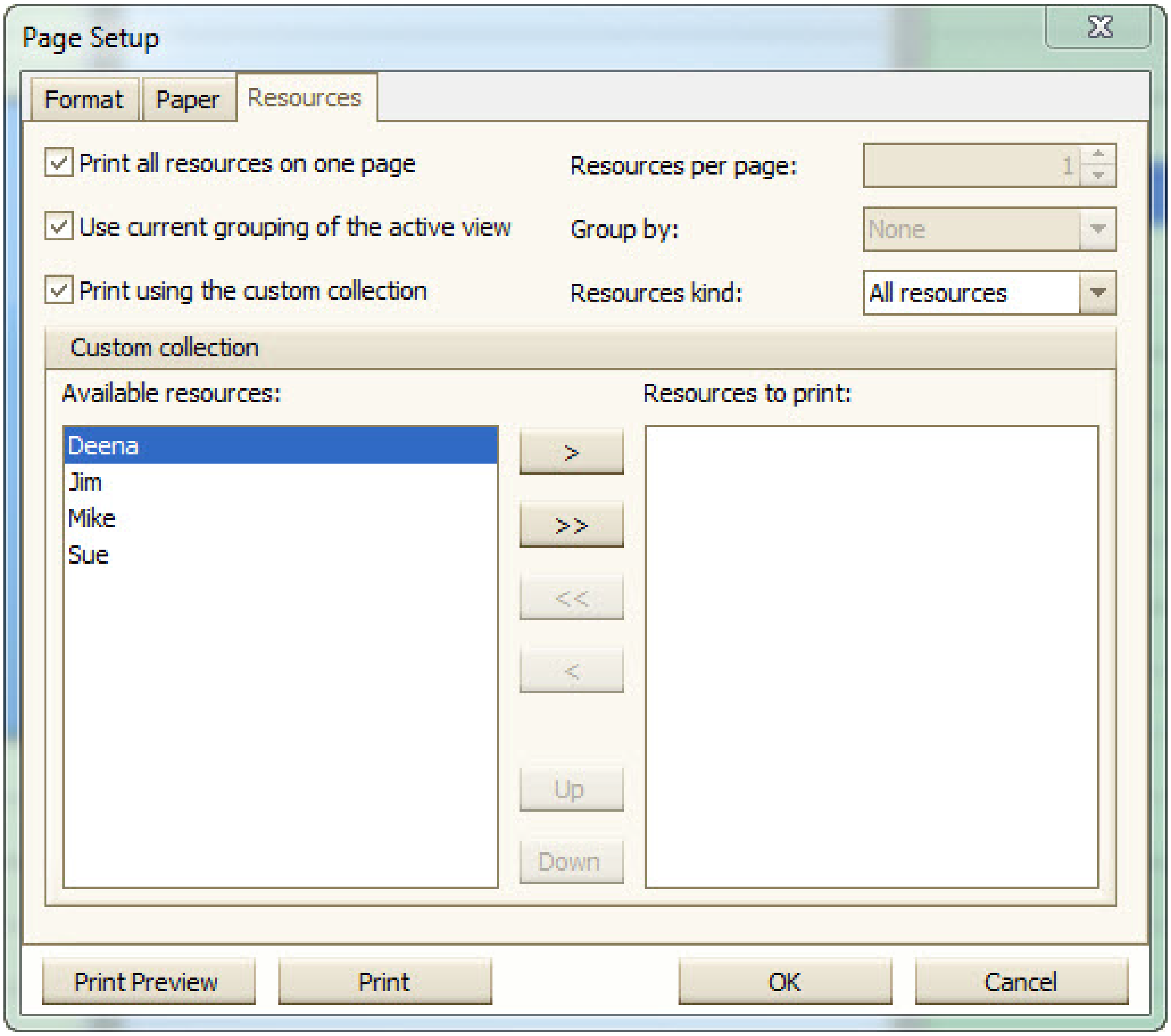
Allpro SchedulePro provides you with complete printing capabilities. There are multiple printing options and formats available.



The calendar can also be printed to a variety of different document types.



You can choose to only print specific resources or you can print all resources in a single calendar if needed.

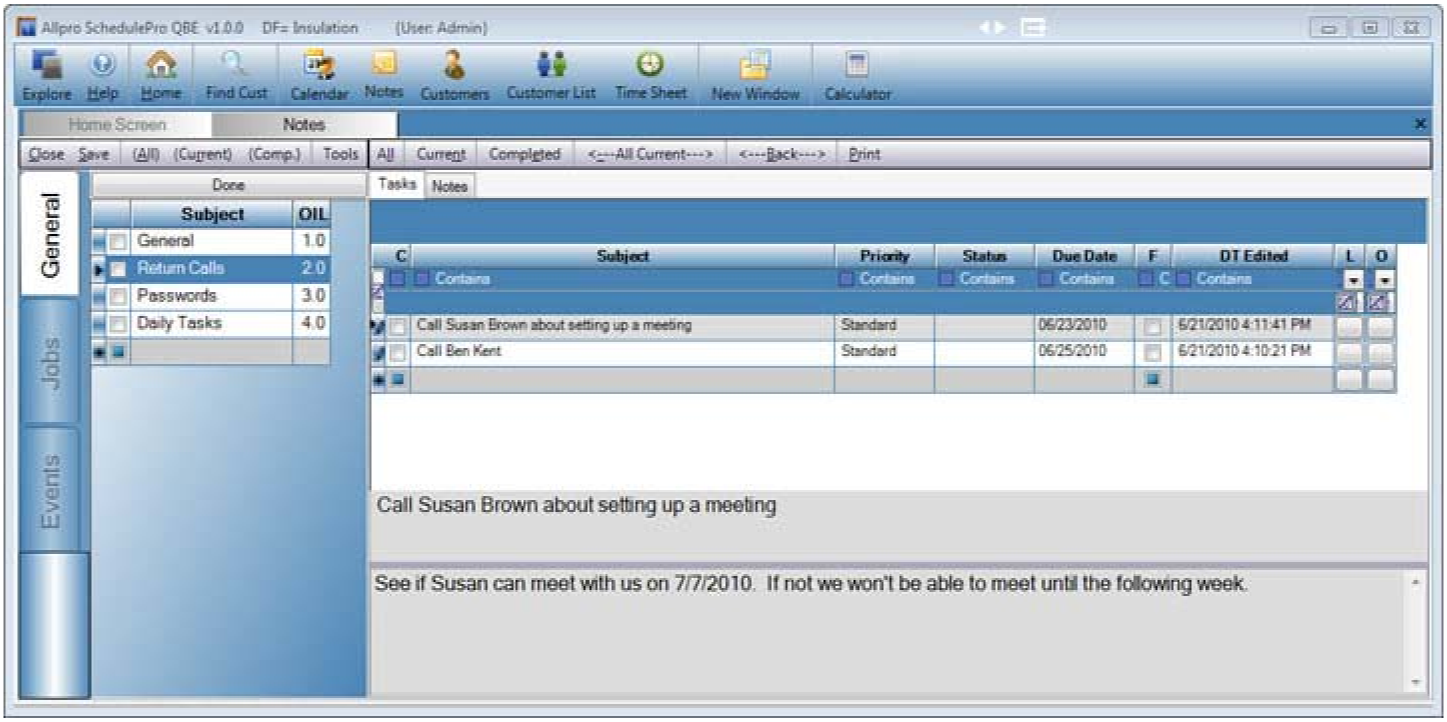


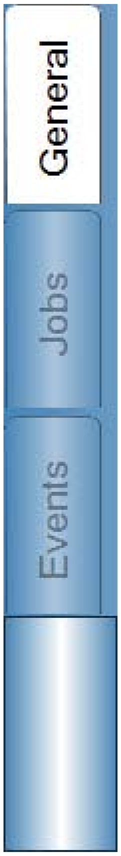
This **Calendar and Task Management Software** provides you with all the printing capabilities you may require.

Working with the Notes Form

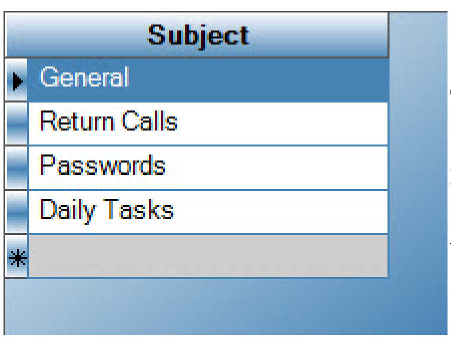
Allpro SchedulePro provides you with complete task management capabilities. The Notes form gives you a convenient place to store and organize your tasks. This **Task Management Software** form provides you with far more than just a simple task list. We have created an easy to use and very time effective way to get organized.

The image below displays the complete Notes form. The Notes form contains several sections. These sections include Notebooks, Subjects, Tasks, and Task Details. The structure of this form is similar to what you would have with an actual paper notebook. Most notebooks contain the notebooks itself, which is broke down into several sections. Each section contain several lines.



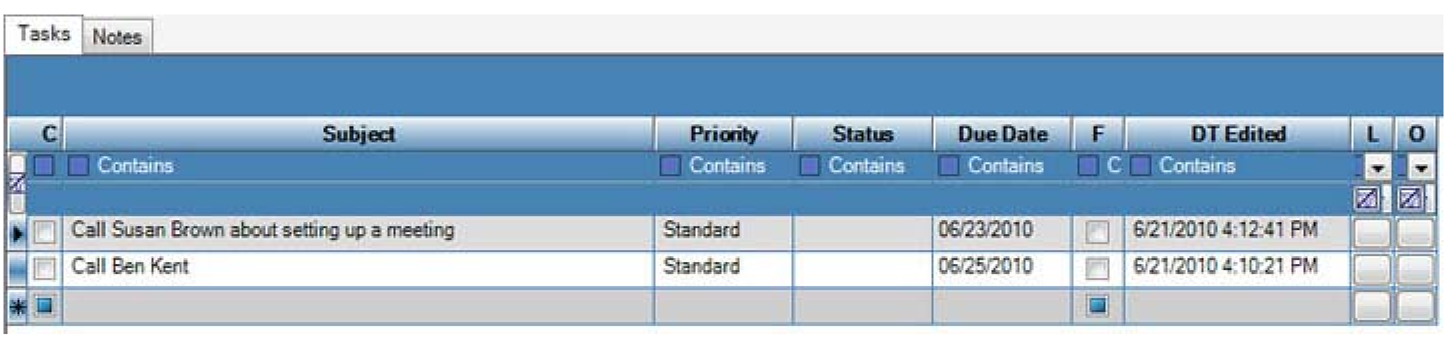


The image to the left displays the Notebook selector. *Allpro SchedulePro* allows you to create as many notebooks as you require. Notebooks usually represent a large category of items you may need to organize. You can think of the notebooks you would like to create similar to what you would name an actual paper notebook. If you were still working on paper you would likely have a separate notebook for each type of information you need to track. To switch from one notebook to the other you simply click on the notebook you would like to work with.

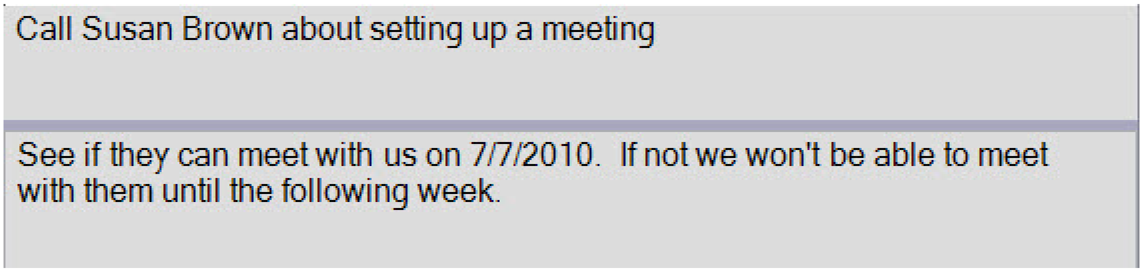


The image to the left displays the Subject Selector. This **Task Management Software** allows you to create as many notebooks as you require. Subjects represent a small group of items you may need to organize. To switch from one subject to the other you simply click on the subject you would like to work with.

The image below displays the Tasks Grid. This grid is where you enter the actual task information. There are several columns that you can use to sort and filter your tasks.



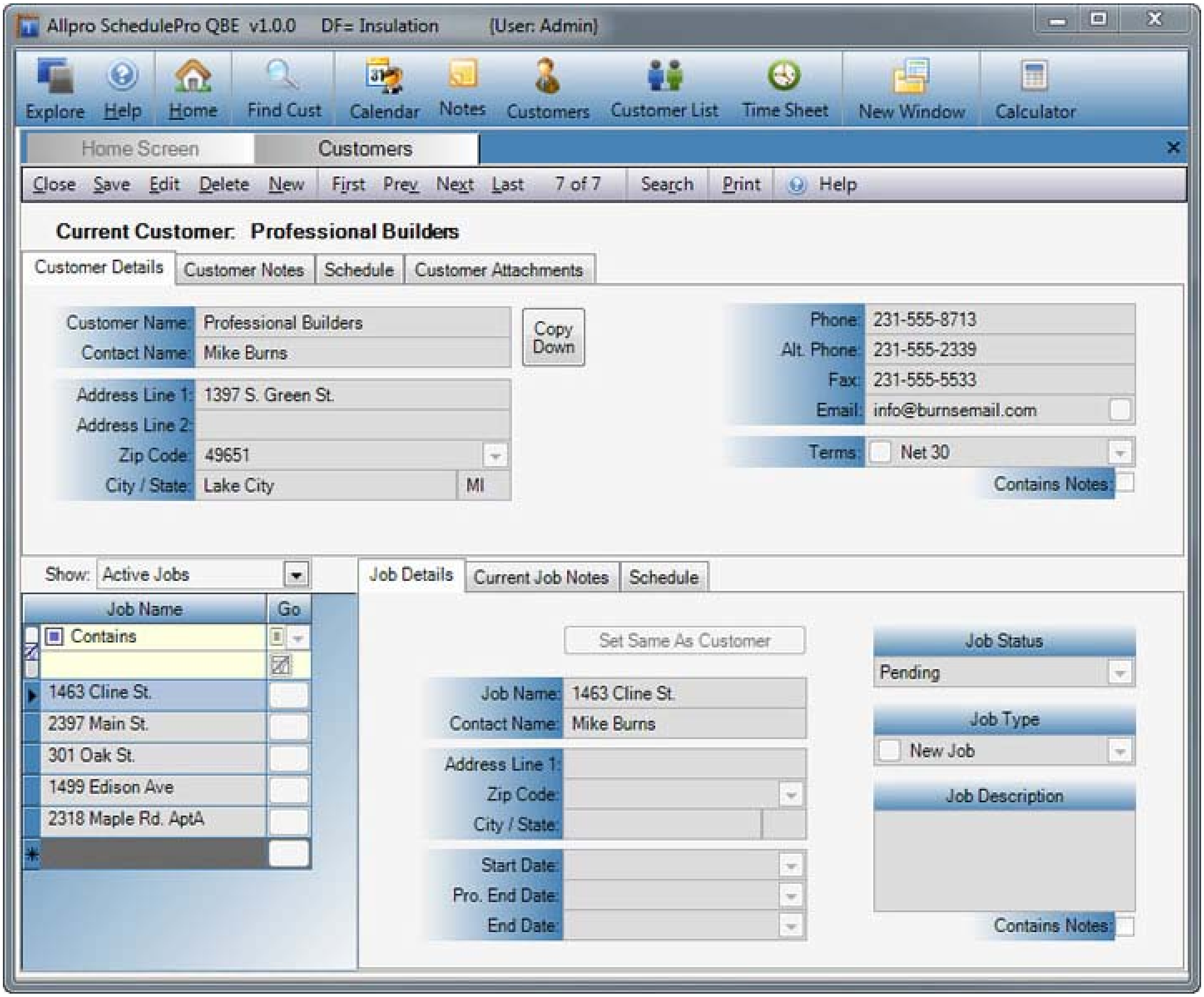
The image below displays the Details area. This area is where you can enter additional information about your tasks. This area can be expanded to be as large as necessary. If a given task contains a lot of information you can simply enter a brief description in the Tasks Grid and then enter all the details in the Details area. The Details area automatically shows the details for each task when you click on a task in the Tasks Grid.



This simple structured **Task Management Software** guarantees to make you more organized. It is extremely easy to use but yet still very effective. Not only can you manage all your personal tasks but you can choose to share your tasks so other Allpro SchedulePro users can view and edit your tasks. This provides better communication between you and the rest of your staff.

Working with the Customers Form

Allpro SchedulePro provides you with an easy way to manage your customers and or jobs. Just like QuickBooks, *Allpro SchedulePro* allows you to create multiple jobs for a single customer. For example, if you do several jobs for a builder, you enter the builder's information on the Customers section of the form (the top section). Then you create a separate job record in the job grid (located on the bottom left side of the form) for each job you do for the builder.



The Customers Form also allows you to view any appointments that were created for a particular customer and or job. This allows you to review the customer's appointment history with your business.

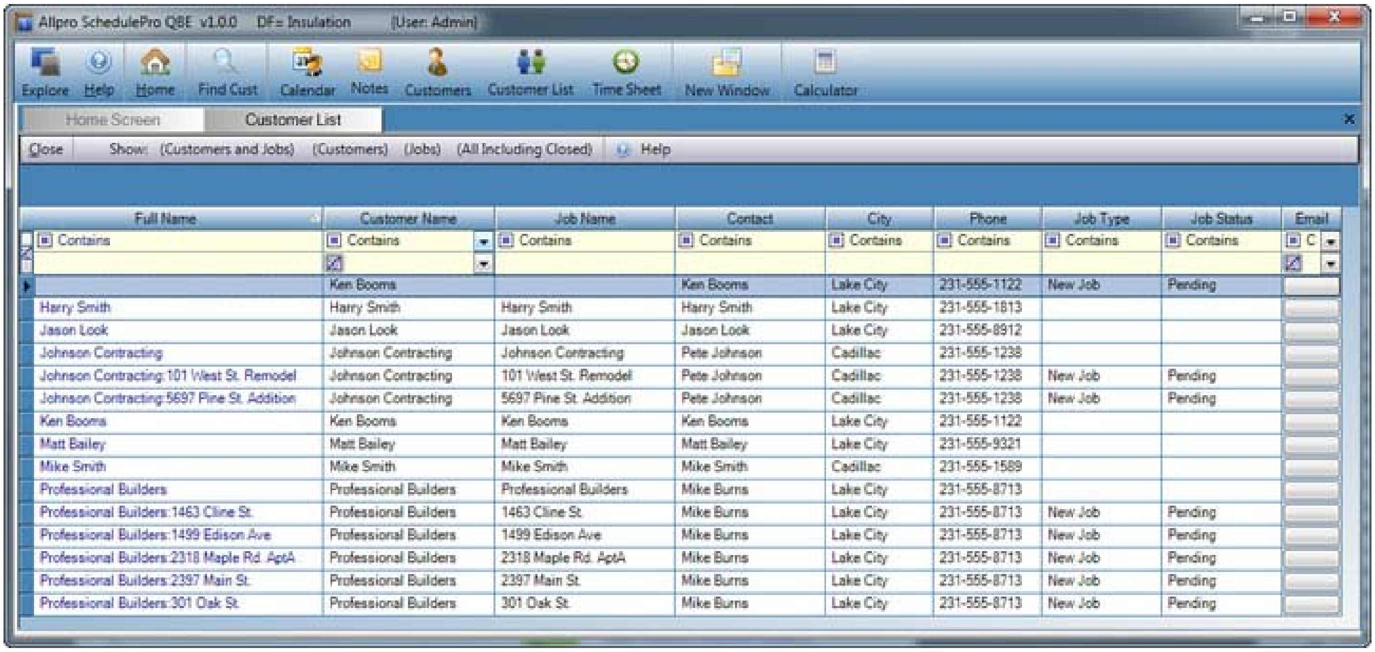
The Attachments tab allows you to create a link to external documents for the current customer. For example, you may have a contract that was created using Microsoft Word or a document that you scanned into the computer as an image. In the Description column you enter a brief description about the file you will be linking to and then select the Browse button. The Open dialog box will be displayed. You can then navigate to the file you would like to link to and then select the Open button. A link will then be created to the file and the file path will be displayed in the Attachment Path column. You can then open the document by selecting the Open button.

By creating links to these external documents you can easily view all of your customer's information from the Customers form even if some of the information is stored outside of the **Scheduling Software**. There is also no quantity limit so you can link to as many files as you need.

Working with the Customer List

The Customer List form allows you to easily locate customers and jobs. When the form is first opened all the customers and jobs that do not have a status of "Closed" are loaded into the grid. You can use the toolbar on the top of the form to easily filter the list to display Customers and Jobs, only Customers, only Jobs, or all Jobs including inactive jobs.

They are sorted by the full Customer/Job name (Customer Name: Job Name). You can change the way the records are sorted by clicking on one of the blue column headers.



Full Name	Customer Name	Job Name	Contact	City	Phone	Job Type	Job Status	Email
Contains	Contains	Contains	Contains	Contains	Contains	Contains	Contains	C
	Ken Booms		Ken Booms	Lake City	231-555-1122	New Job	Pending	
Harry Smith	Harry Smith	Harry Smith	Harry Smith	Lake City	231-555-1813			
Jason Look	Jason Look	Jason Look	Jason Look	Lake City	231-555-8912			
Johnson Contracting	Johnson Contracting	Johnson Contracting	Pete Johnson	Cadillac	231-555-1238			
Johnson Contracting:101 West St. Remodel	Johnson Contracting	101 West St. Remodel	Pete Johnson	Cadillac	231-555-1238	New Job	Pending	
Johnson Contracting:5697 Pine St. Addition	Johnson Contracting	5697 Pine St. Addition	Pete Johnson	Cadillac	231-555-1238	New Job	Pending	
Ken Booms	Ken Booms	Ken Booms	Ken Booms	Lake City	231-555-1122			
Matt Bailey	Matt Bailey	Matt Bailey	Matt Bailey	Lake City	231-555-9321			
Mike Smith	Mike Smith	Mike Smith	Mike Smith	Cadillac	231-555-1589			
Professional Builders	Professional Builders	Professional Builders	Mike Burns	Lake City	231-555-8713			
Professional Builders:1463 Cline St.	Professional Builders	1463 Cline St.	Mike Burns	Lake City	231-555-8713	New Job	Pending	
Professional Builders:1499 Edison Ave	Professional Builders	1499 Edison Ave	Mike Burns	Lake City	231-555-8713	New Job	Pending	
Professional Builders:2318 Maple Rd. AptA	Professional Builders	2318 Maple Rd. AptA	Mike Burns	Lake City	231-555-8713	New Job	Pending	
Professional Builders:2397 Main St.	Professional Builders	2397 Main St.	Mike Burns	Lake City	231-555-8713	New Job	Pending	
Professional Builders:301 Oak St.	Professional Builders	301 Oak St.	Mike Burns	Lake City	231-555-8713	New Job	Pending	

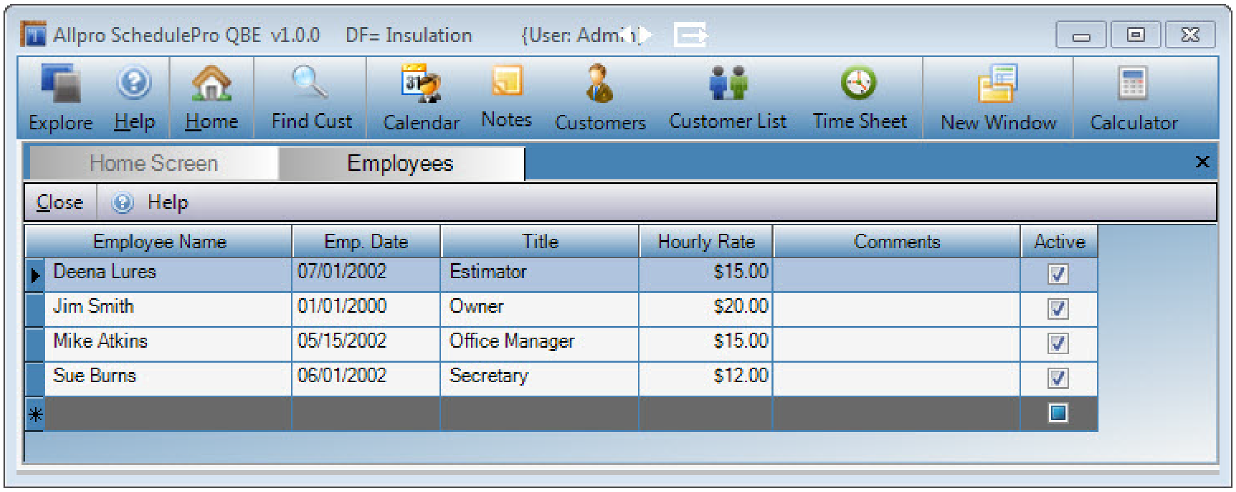
You will also notice that the Full Name column text is dark blue and all the other column's text is black. Blue text in a grid indicates that when selected the text is a link. When you hover your mouse over the Full Name column, a button will be displayed. If you selected the button the current customer will be opened in the Customers form.

The Email Button column which is located to the far right of the grid allows you to easily send emails to your customers. If you click on this button Microsoft Outlook or Outlook Express will open and a new email message will be created with the Customer's email address entered into the "To" field. Note that this feature only works if you are using Microsoft Outlook or Microsoft Outlook Express.

The **Scheduling Software** Customer List form provides you with several ways to filter and sort your customers so you can easily find customers even if you don't know all of their information when you are starting the search.

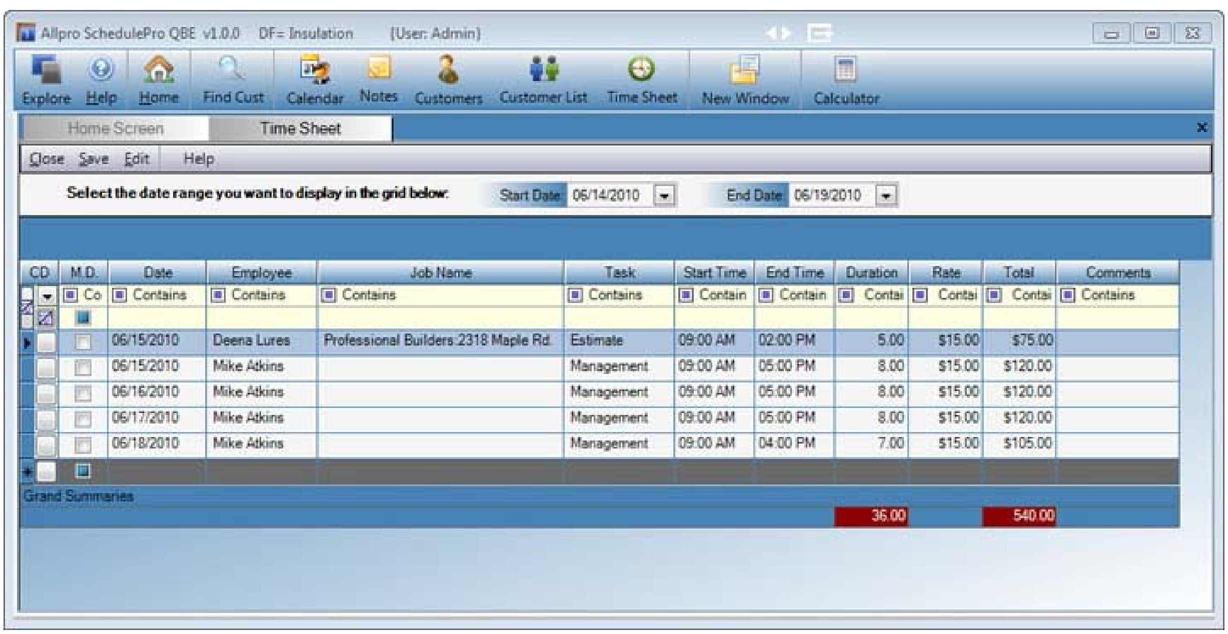
Setting Up Your Employees

Before you can start entering information on the **Scheduling Software** Time Sheet form you have to create your employees. The grid below is displayed when you open the Employees form. This grid allows you to enter information about all of your employees.



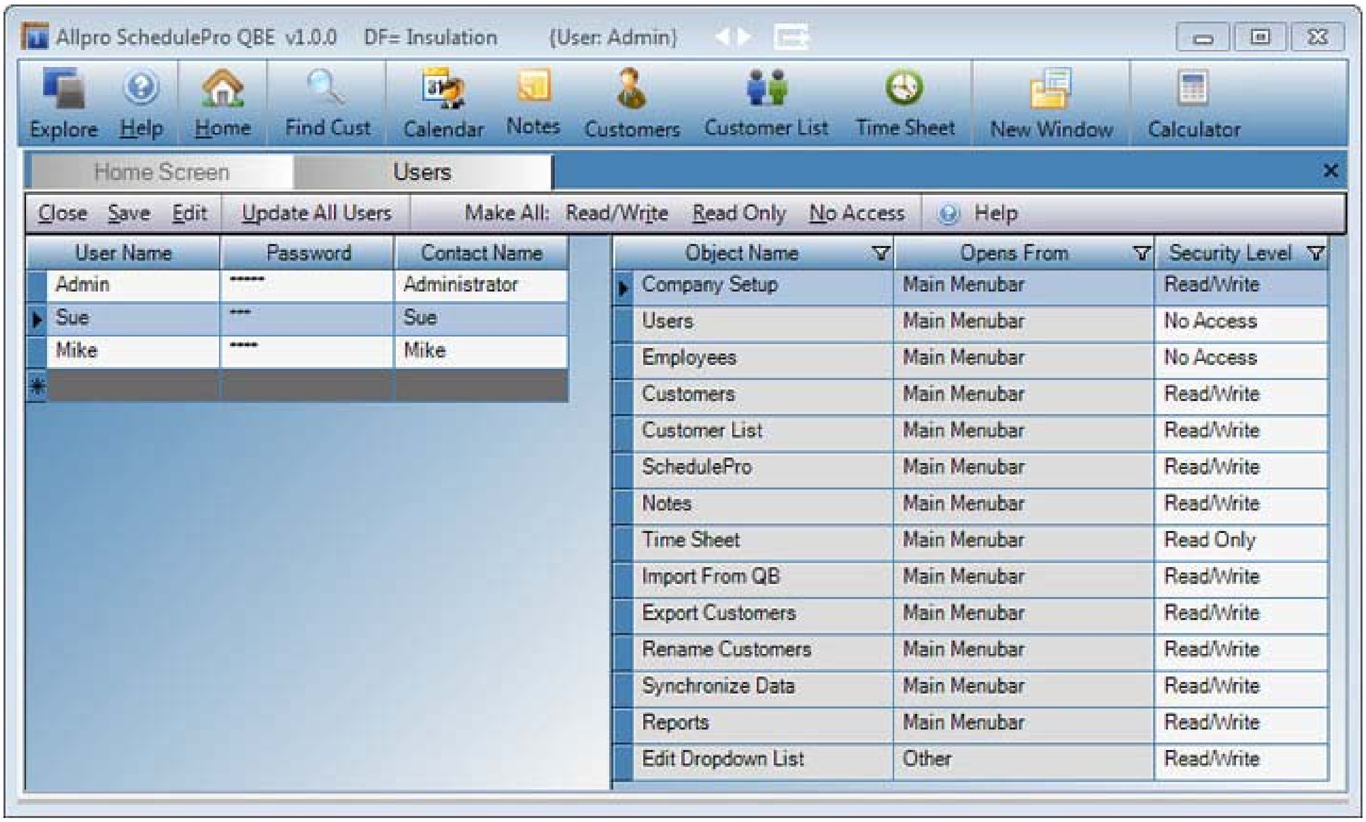
Entering Time Sheet Information

Allpro SchedulePro provides you with a simple way to track your employees time sheet information. The Time Sheet form not only allows you to track time durations but you can also associate each time sheet entry with a task and a Customer/Job. This provides you with an easy way to track how much labor you are spending on each task and Customer/Job.



Setting Up Your Software Users

Allpro SchedulePro provides you with complete user level security. This **Scheduling Software** allows you to create a separate user account for each person who will be using the software. The Users form allows you to specify which forms and reports each user will have access to. For example, you may not want all of your users to have access to the Employees form because they would be able to view each employees pay rate. You can set their Security Level to "No Access". By setting "No Access" the user will not be able to open the form.



Regardless of whether you will be installing *Allpro SchedulePro* on one computer or one hundred, you can create an unlimited quantity of **Calendar Software** users.

Multiple User Support

Allpro SchedulePro can be installed on multiple computers on your network. If all of your computers are always connected to the same network then there is no reason to synchronize your data. You would simply install *Allpro SchedulePro* on each computer and then point each workstation installation to the database located on the main computer. On the other hand if you have a laptop that you will be taking out of the office you can synchronize your copy of *Allpro SchedulePro* with the primary computer on your network. This allows you to take your laptop to job sites or even home with you for easier after hours work.

When you synchronize your laptop with the primary computer any changes that were made from any of the computers on the network will be copied over to your laptop. Any changes that were made on your laptop will also be copied over to the primary computer.

By providing two powerful data sharing options you are guaranteed to always have all of your important data with you at all times. This ensures you don't ever have to go without your **Scheduling Software**. The data synchronization method is also superior to online calendars because you don't have to worry about having an internet connection to do your work. Your business is self contained and not reliant on any external services.

Multiple Data File Support

Allpro SchedulePro also allows you to work with multiple data files. This is useful if you own multiple companies and you want to track each company separately. You can track each company in a separate data file and easily switch from one company to the other.

Allpro SchedulePro Tour Summary

As you can see *Allpro SchedulePro* provides you with all the tools you need to fully automate your office operations. This tour demonstrated what we feel are the most useful features in this comprehensive **Scheduling Program**. There are however, several more features not mentioned.

This software is ideal for any business that needs to automate their scheduling and task management processes.

If you have any questions about *Allpro SchedulePro* please don't hesitate to contact us via email or telephone.

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