

ORDER VERIFICATION AM/PM CALENDAR: USERS GUIDE

The new Order Verification Calendar is very similar to the Remeasure/OV Calendar that we have used for years. The main difference is that sales reps will schedule a job in the morning or afternoon.

The system can be found at: www.pellaoki.com/OV. Note, if you use links to the old calendar you will be redirected to the new calendar.

Same	Different
Rep schedules an appointment by choosing a day. Ted is notified by email of the appointment.	Rep chooses morning or afternoon, Ted determines the actual time of the appointment.
Zip Codes determine which days you can schedule an appointment.	Quote number is now being used, and is required.
You must enter all information when filling out the form.	
If you forget your password you can get it by using the "Forgot Password" link on the login page.	

Take a look at the 3 screen images below. Though they may look like the "help file" for the old system, they actually explain many of the new features/layout of the new OV system.

The screenshot shows the Order Verification Calendar interface. At the top, it displays 'User: 758E CINN_SHOW_ALL' and a dropdown menu currently set to 'CINN_SHOW_ALL'. To the right, it shows 'New Region/Zip 45202'. Below this is a calendar for August 2009. The calendar grid shows days of the week (Mon-Fri) and dates (3-13). Each date has 'AM PM' slots. Callout boxes provide the following information:

- Filter calendar, ALL, to Ted-RM1, Dan-RM2:** Points to the 'CINN_SHOW_ALL' dropdown menu.
- Change the zip code when needed:** Points to the 'New Region/Zip 45202' text.
- Choose AM or PM Dec 2009—Each OV person has 4 slots per day, 2 in AM 2 in PM:** Points to the 'AM PM' labels on the calendar dates.
- Can't enter a job on these days—based on zipcode:** Points to a highlighted area on the calendar grid (Tuesday, 4th).

Another view of the calendar

Tue	Wed	Thu	Fri
7	8 PM	9	10
	4 Bob Martin Units: 1	1111 Jane A Units: 1	
	adsfadsf Rep: 758c Charles Smith 45202 / Units: 0	<input type="checkbox"/> List_OV_Jobs	Mark Sn Units: 0
	Sam Kent Units: 0		3 Cary Kin Units: 22
	9333 Rep: 758c Joe Billy 45202 / Units: 1		
	94		

Rep can only edit his own jobs (green hyperlinks).

Only PM slots left for July 8. The morning appointments are all taken.

Below gold line is AM
Above gold line is PM

You can edit your job after you submit it

Order Verification Person CINN_RM1

Appointment Time: AM

CUSTOMER INFO

Name: kim smith	Job Address: 3933 millsbrae
City: Cincinnati	Zip: 45202
Home Phone: 494949	Cell Phone:
Work Phone:	Email: N/A

Can't edit these three fields. One has to delete the job and start a new one.

1. AM or PM
2. Name
3. Zip

Ted is notified of any changes to the appointment.

After the Order Verification

After the Order Verification is completed, Ted will go into the system and mark it as either "Order Stands As Is" or he will make comments, including any revenue changes. The sales rep will get an email. If there are revenue changes, then the sales manager will be notified.