



Appointment Maker

Reference Guide

REV: 08/27/2012_v6





Appointment Maker Reference Guide

| | |
|------------------------------------|----|
| Introduction | 3 |
| Benefits: | 3 |
| Action Required: | 3 |
| Creating an Appointment | 4 |
| Creating Self Appointments | 11 |
| Viewing Schedules | 18 |
| Creating Utilization Reports | 19 |
| Frequently Asked Questions | 21 |



Appointment Maker Reference Guide

Introduction

To provide a better customer experience, the Kitchen Designer Appointment Tool (KDAT) is being replaced with a new appointment tool known as Appointment Maker (AM). Appointment Maker will be rolled out to our Specialty departments including Flooring (D23), Millwork (D30) and Décor (D59) and allows any associate to schedule a customer with a Specialist, Designer, Department Supervisor or COS. In addition, customers will also be able to set up their initial appointments online themselves (available after October 30th). This is great for both customers and associates because they can better plan their day knowing they have a confirmed appointment.

NOTE: KDAT will continue to be used for Kitchens - D29 until October 30th, at which time it will be replaced with Appointment Maker.

Benefits:

- Supports the “call, click or visit” strategy to help customers shop how they want when they want
- Allows customers to schedule appointments with knowledgeable associates in Flooring, Millwork, and Decor
- Enables all associates to make, change, or cancel customer appointments
- Automatically blocks out time at the beginning and end of associates’ work shifts, and before and after associates’ scheduled lunch, as well as allowing appointment scheduling in 15 minute intervals that aligns with the scheduled shifts coming from FaST.
- Shows associate availability for appointments based on their scheduled departments and their job titles to ensure that associates that are cross scheduled into secondary departments will not show up as available for appointments.
- Scheduled shifts available for appointments will be updated daily within Appointment Maker to ensure the most up to date schedules are presented to customers for appointments.
- Sends customers e-mail confirmations of scheduled appointment (if customer provides e-mail address)
- For Initial Appointments only, a lead quote is automatically created with the Appointment ID in the job description; will display in My Quotes for the designer/specialist the appointment is scheduled with.
- For all appointments, a note with the appointment details is automatically created and assigned to the designer/specialist responsible for the appointment, making it easy for associates to quickly see they have an upcoming appointment.

Action Required:

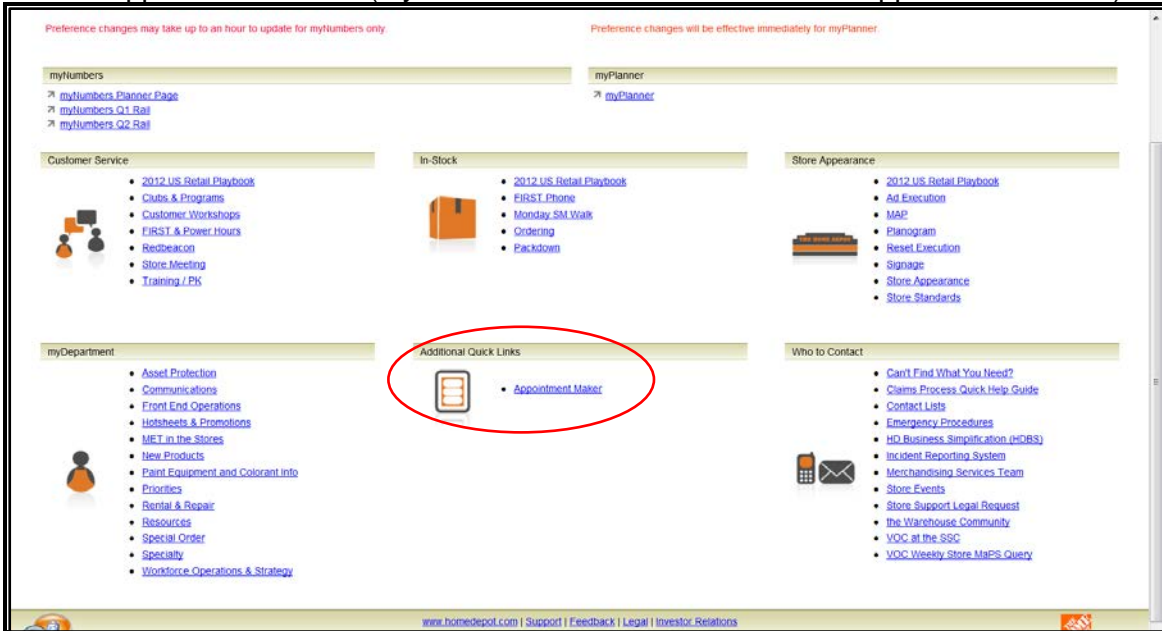
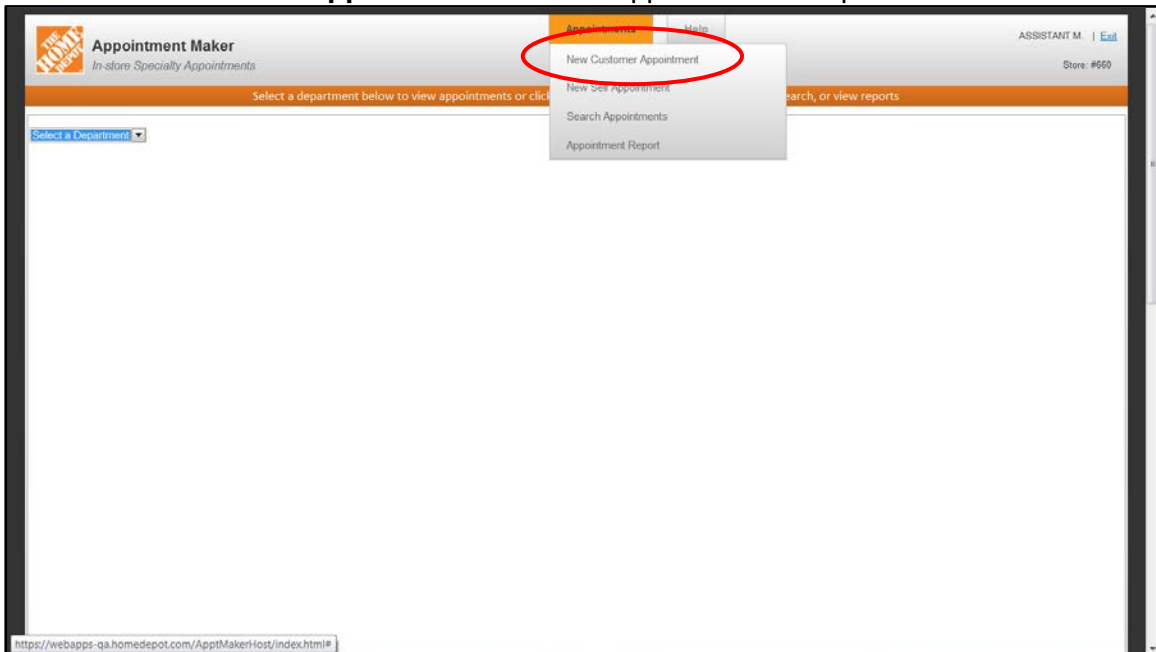
- Complete the Appointment Maker training (WBT-00047700) found in Knowledge Depot (myApron > my Tool Box > Knowledge Depot). Class completion time will take approximately 15 minutes.
- Ensure that all Specialists, Designers, COS and Department Supervisors in D59/D23/D30 are properly assigned by job code. If incorrect, please contact the HR Service Center to modify.
- Review My Quotes and My Notes in ESVS daily at the beginning of work shift to determine if any appointments have been made or need to be changed.
- Review Appointment Maker daily against the store schedule. ASM/MOD will be expected to verify that all appointments are covered for the day. If not, the ASM/MOD must ensure the customer is contacted to determine if they’d like to reschedule or have the appointment covered by another specialist.



Appointment Maker Reference Guide

Creating an Appointment

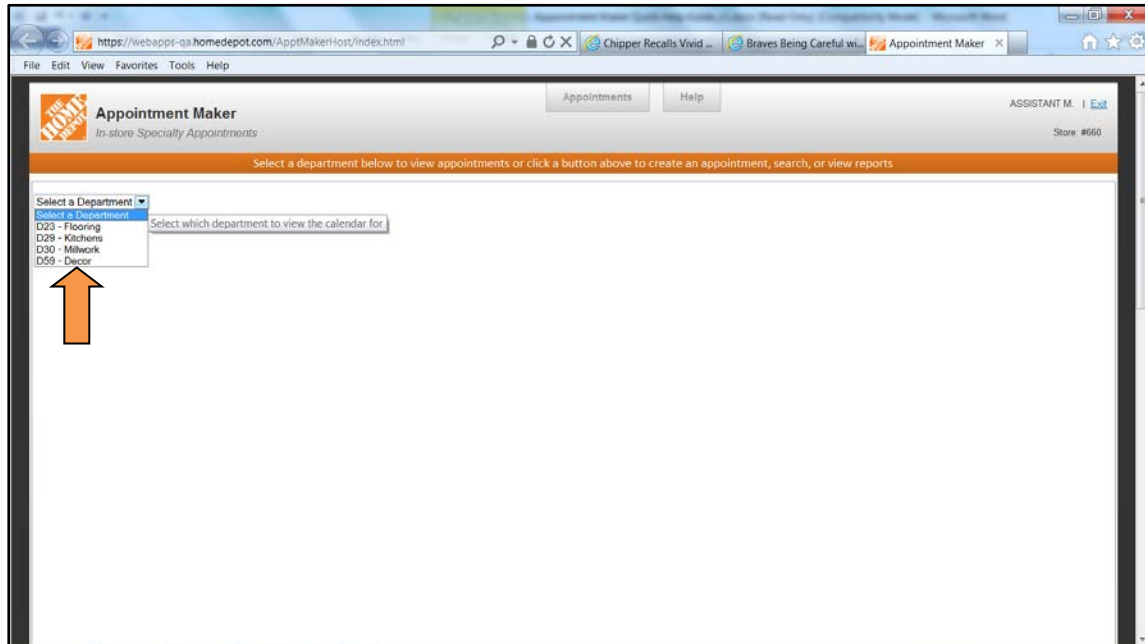
With the Appointment Maker you will be able to better to assist the customer by assigning them specific appointment times. Follow the steps below to properly set up an appointment.

| Step | Action |
|------|---|
| 1 | <p>Access Appointment Maker (My Success>Additional Quick Links>Appointment Maker):</p>  <p>Note: Appointment Maker can also be accessed from myApron>Workbench>Applications>Appointment Maker</p> |
| 2 | <p>Select New Customer Appointment from the Appointments drop-down menu:</p>  |

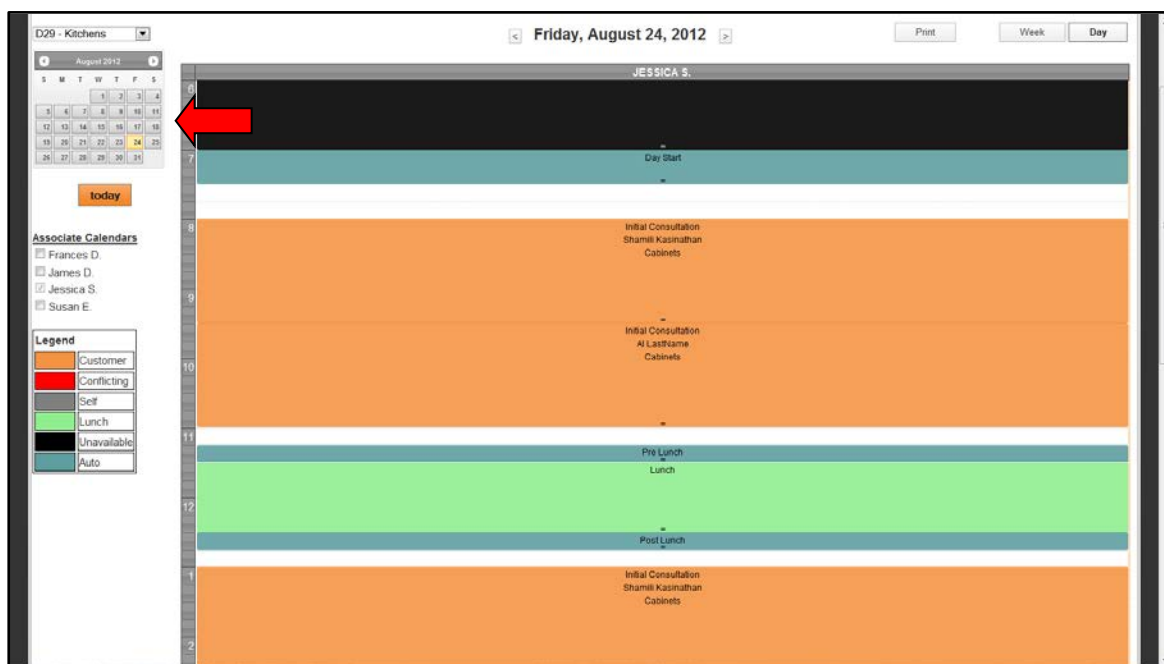


Appointment Maker Reference Guide

- 3 Select the appropriate department from the Department drop-down menu:



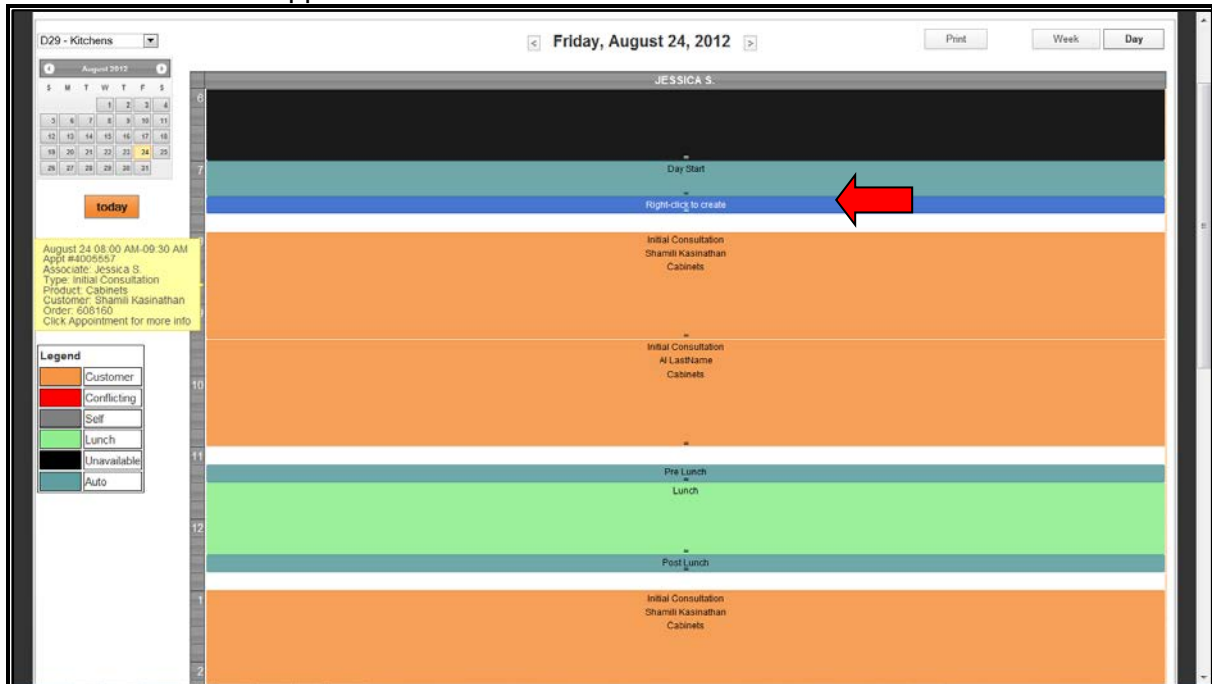
- 4 Click on the desired date on the calendar:





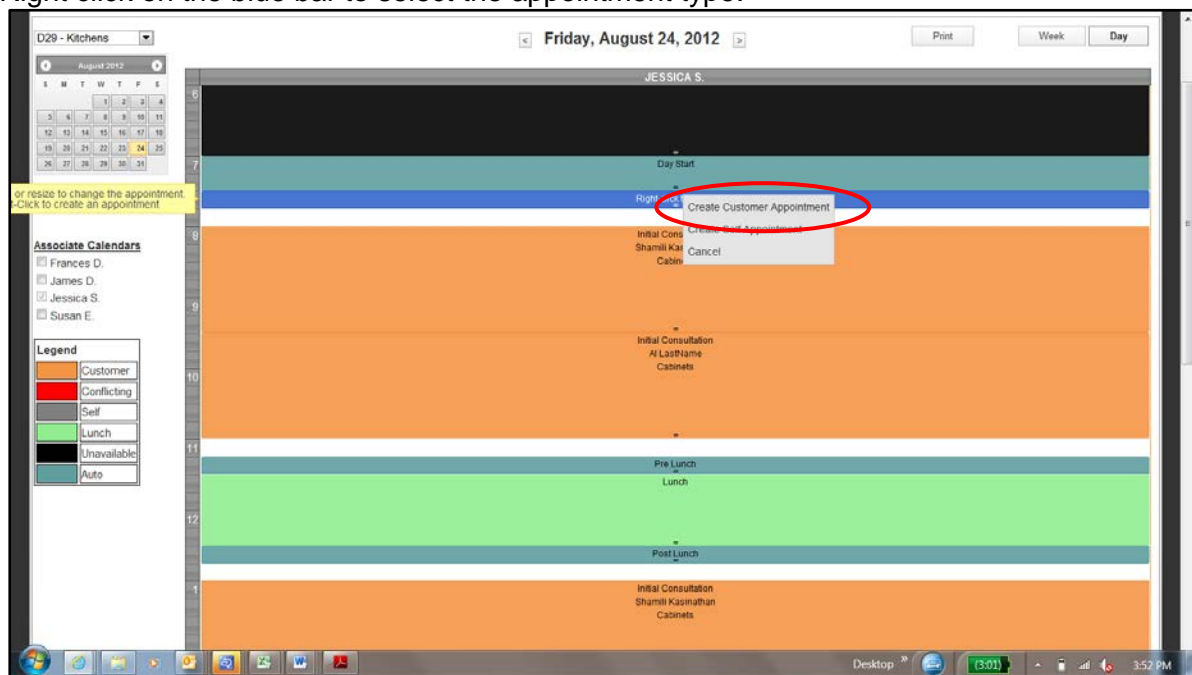
Appointment Maker Reference Guide

- 5 Click on the desired appointment time from the schedule:



Note: To make the appointment longer, click and drag on the blue bar.

- 6 Right click on the blue bar to select the appointment type:





Appointment Maker Reference Guide

7

Select the product for the appointment from the Product Type drop-down menu:

The screenshot shows the 'Appointment Maker' interface. At the top, there's a header with 'Appointment Maker' and 'In-store Specialty Appointments'. Below this, a navigation bar includes 'Home > Create Appointment'. The main form has several fields: 'Department' (D29 - Kitchens), 'Product Type' (Select Product), 'Appointment Type' (Select Appointment), 'Associate' (JESSICA SANCHEZ), 'Date' (08/24/2012), and 'Time' (07:30 AM - 07:45 AM). A red arrow points to the 'Product Type' drop-down menu, which is open, showing options: 'Select Product', 'Cabinets', 'Countertops', and 'Kitchens - Other'. To the left of the main form is a calendar for August 2012, with the 24th highlighted. Below the calendar is a 'Legend' section with color-coded boxes for Customer (orange), Conflicting (red), Self (grey), Lunch (green), Unavailable (black), and Auto (blue). The main calendar area shows a timeline for Jessica S. with slots for 'Day Start', 'Initial Consultation' (Shamili Kasinathan Cabinets), and 'Initial Consultation' (Al LastName Cabinets). A 'Next' button is visible in the top right corner.

8

Select the type of appointment from the Appointment Type drop-down menu, and then click **NEXT**:

The screenshot shows the 'Appointment Maker' interface. The 'Product Type' is now set to 'Countertops'. The 'Appointment Type' drop-down menu is open, showing options: 'Select Appointment', 'Initial Consultation', 'Follow-up Visit', and 'Closing Appointment'. A red arrow points to this menu. The 'Next' button in the top right corner is circled in red. The rest of the interface, including the calendar and legend, remains the same as in the previous screenshot.



Appointment Maker Reference Guide

9

Search for a customer to attach to the appointment in any of the following ways:

- Click **Phone Search**, enter the customer's phone number, and click **Search**
- Click **Name Search**, enter the customer's name, and click **Search**.
- Click **Order Search**, enter the order number, and click **Search**.

The screenshot shows the 'Appointment Maker' interface. At the top, there's a header with 'The Home Depot' logo, 'Appointment Maker', and 'In-store Specialty Appointments'. Below this is a navigation bar with 'Appointments' and 'Help' buttons. The main area is titled 'Enter customer information to search for a customer or create a new one.' It includes a 'Customer Appointment' section with fields for Department, Product Type, Appointment Type, Associate, Date, and Time. Below this is a 'Customer' section with three search options: Phone Search, Name Search, and Order Search. A red arrow points to the 'Search' button.

10

Locate the appropriate customer from the list and click **Select**.

The screenshot shows the 'Appointment Maker' interface with a list of customers. The list has columns for Name, Phone Number, Address, Email, City, State, Zip, and a 'Select' button. A red arrow points to the 'Select' button for the first customer, 'AASFASD ASDFASD'S'.

| Name | Phone Number | Address | Email | City, State, Zip | Select |
|-------------------|--------------|------------------------|-------------------------|-------------------------------|--------|
| AASFASD ASDFASD'S | 7704338211 | UNKNOWN | 1@4.COM | ADFAFDSADF, AL 30309-1111 | Select |
| ROBERT BAARS | 7704338211 | 3588 TUCKERS FARM SE | TEST@GMAIL.COM | MARIETTA, GA 30067-5181 | Select |
| MARNA BAKER | 7704338211 | 2455 PACES FERRY RD NW | | ATLANTA, GA 30339 | Select |
| MARNA BAKER | 7704338211 | 2455 PACES FERRY RD NW | | ATLANTA, GA 30339 | Select |
| SUGANYA CHANDRA | 7704338211 | GREAT | SARIDE_RAKESH@HOMEDEPOT | NEW YORK, NY 10030 | Select |
| JASON DAIGLER | 7704338211 | 610 ATLANTA AVE | JASON_DAIGLER@HOMEDEPOT | ATLANTA, GA 30312 | Select |
| HOMER DEPOT | 7704338211 | 2455 PACES FERRY RD SE | HOMER.DEPOT@HOMEDEPOT | ATLANTA, GA 30339-1834 | Select |
| NORENE ELDRIDGE | 7704338211 | 4987 ALDER LN | NOREJOY@GMAIL.COM | POWDER SPRINGS, GA 30127-3312 | Select |
| MARTY GRECO | 7704338211 | | | .00000 | Select |



Appointment Maker Reference Guide

11

Enter any related notes in the Notes area and click **Create**; then print, view, or close the appointment

12

Message appears “Appointment Successful”; from here, the appointment you can print, view, or close the appointment:



Appointment Maker Reference Guide

13

Once the appointment is created, a quote is created in ESVS (initial appointments only) and is assigned to the associate that the appointment is scheduled with. A note, containing all the appointment details, is added to the order (all appointment types) with a follow-up date one day prior to the appointment as a reminder that the associate has an appointment the following day:

Special Services
Version: 1.4.2.0

Welcome: CASHIER091 STORE OLVM01A #09773 Aug 27, 2012 2:11 PM

Create/Maintain

- Create Stock Product Carry Out
- Create Stock Product Will Call
- Create Stock Product Delivery
- Browse
- Create Measure
- Create and Maintain
- Create Customer Out for Repair

Follow-Up

- Order Management

Applications

- Store Systems
- Store Lead Entry
- HomeDepot.com

My Quotes

| Follow up Date | Order # | RTS/RTS | Customer | Job Desc | Pre-Tax Totals |
|----------------|---------|---------|------------------|----------------------|----------------|
| 2012-09-29 | 432204 | RTS | KREMER, VICTORIA | APPOINTMENT:19742... | \$0.00 |

My Notes

| Follow up Date | Order # | Order Status | Line # | Created By | Note |
|----------------|---------|--------------|--------|-------------------|---|
| 2012-09-29 | 432204 | Quote | 0 | STORE, CASHIER091 | D23 Appointment:1974271. Scheduled for 09/04/2012 02:30 PM. Created by:LOLA MARSH. Product Code: Type:Initial Consultation. Created Name: STORE, CASHIER091. Created Date: 2012-08-27 |

My Store Quotes

Search For Quotes/Orders

Search For Notes

The job description contains the Appointment ID and displays in the My Quotes section for the associate responsible for the appointment.

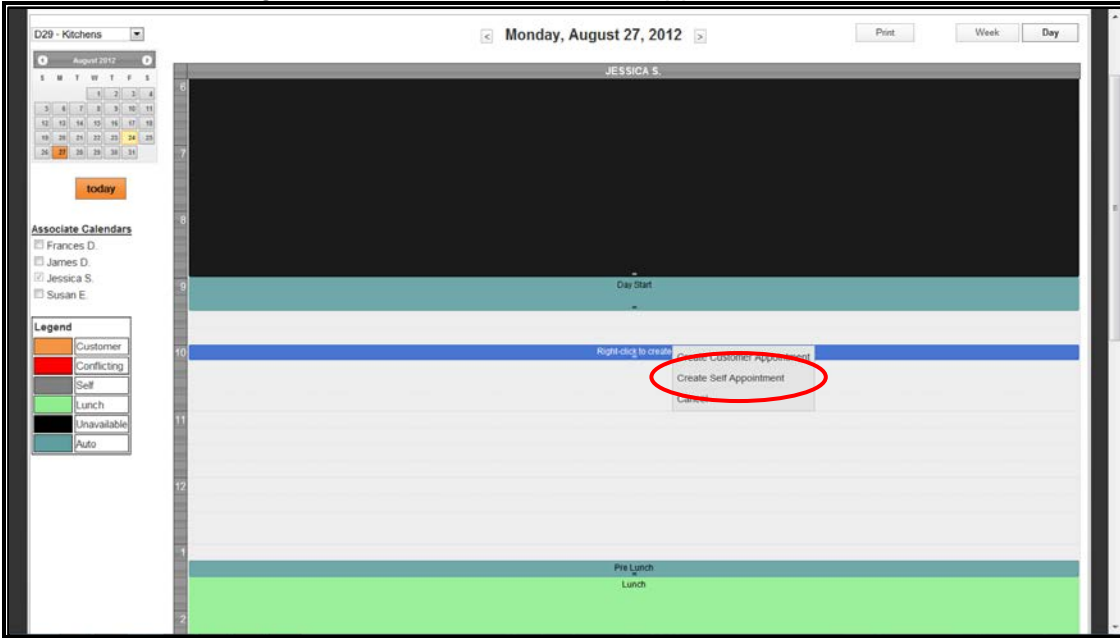
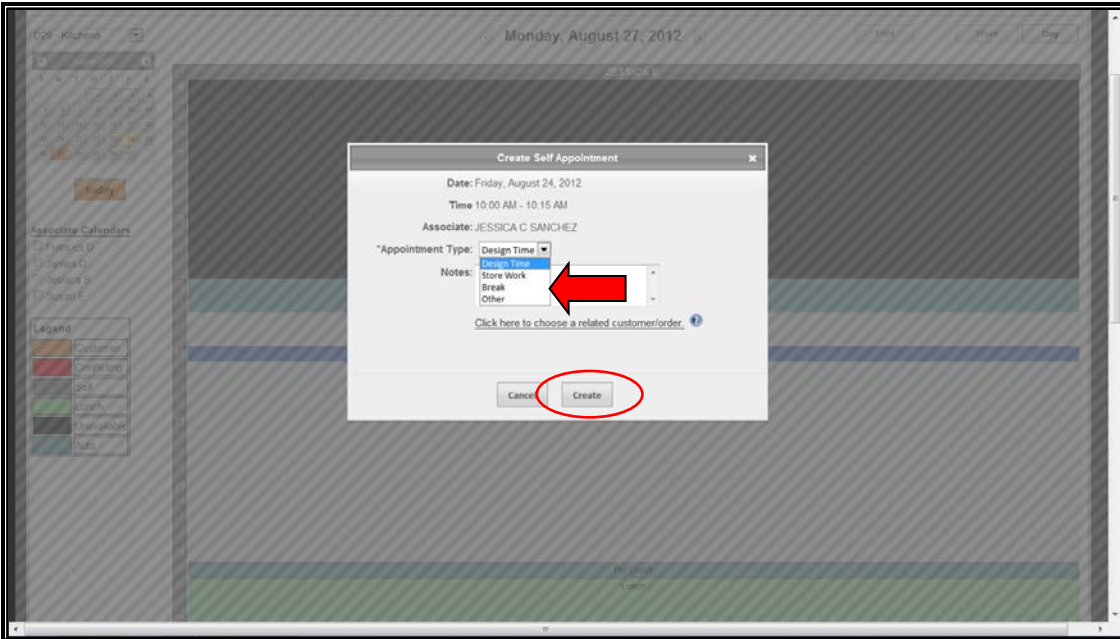
The note on the appointment quote contains all details about the appointment.



Appointment Maker Reference Guide

Creating Self Appointments

Designers and Specialists can create Self Appointments to block out time for store work, design time, or other tasks. Use the steps below to create self appointments.

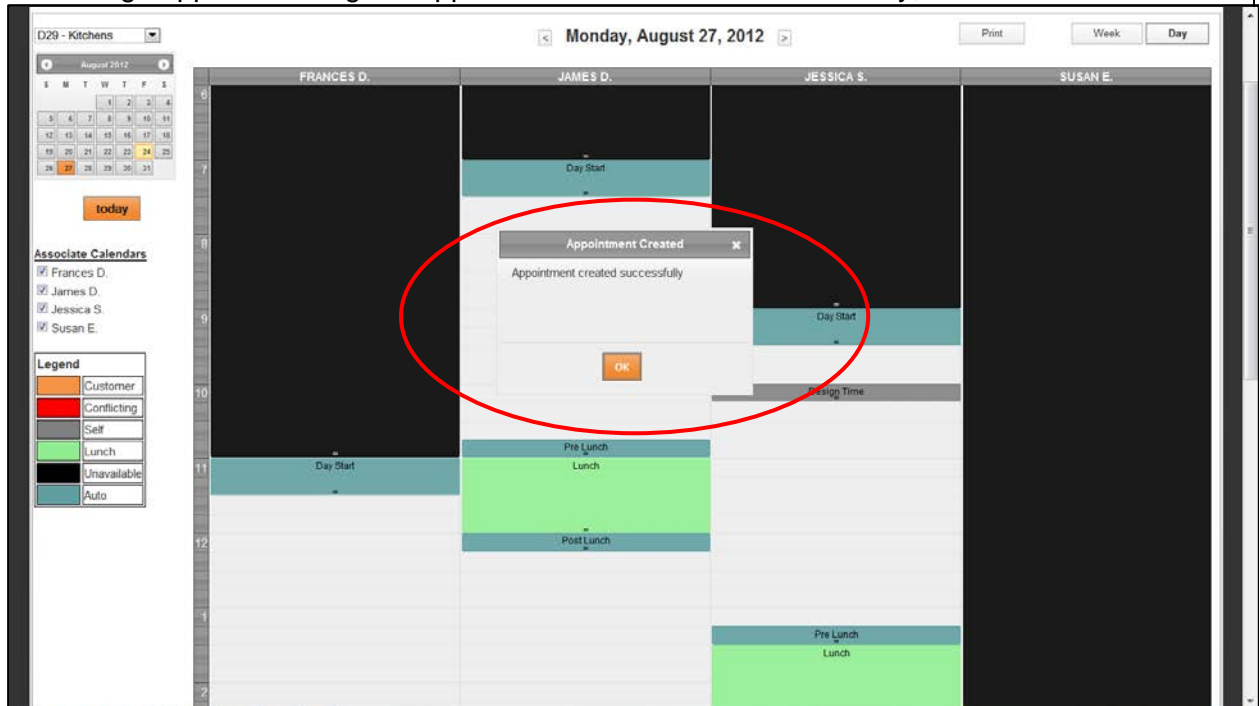
| Step | Action |
|------|---|
| 1 | <p>After selecting the desired department and date, click on the desired appointment time on the schedule and then right click to select Create Self Appointment:</p>  <p>Note: To make the appointment longer, click and drag on the blue bar.</p> |
| 2 | <p>Select the type of self-appointment that you would like to schedule from the Self Type drop-down menu, and click Create:</p>  |



Appointment Maker Reference Guide

3

A message appears stating the appointment was created successfully; click OK:





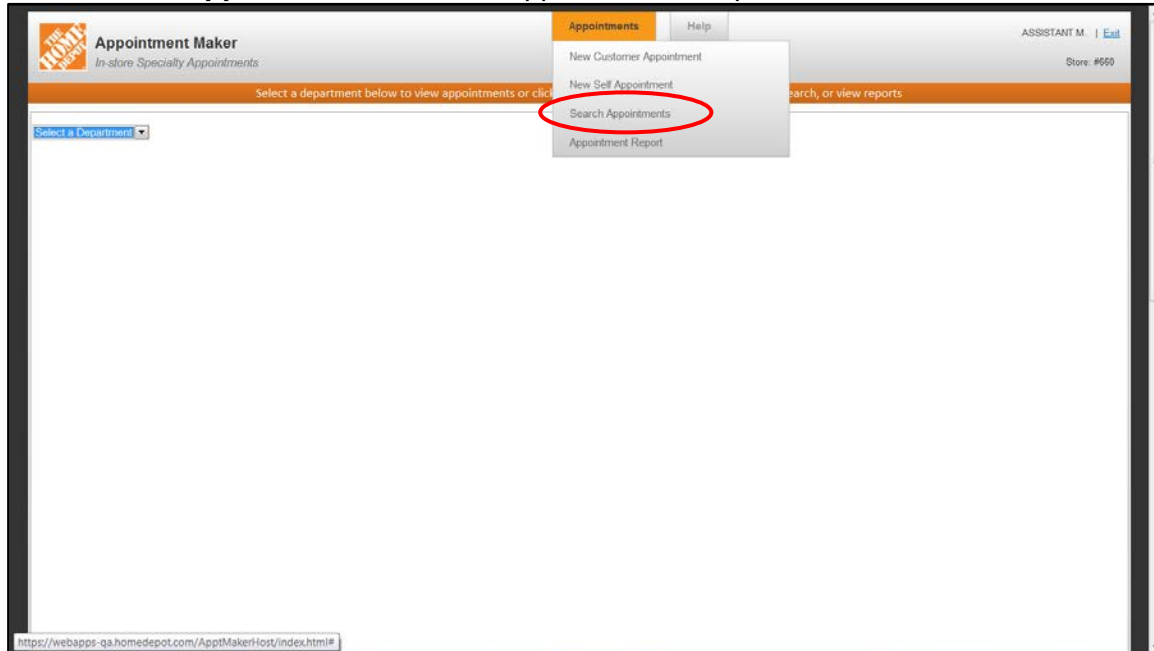
Appointment Maker Reference Guide

Searching for Appointments

You can search for appointments in a variety of ways to quickly locate any appointment. Use the following steps to search for an appointment.

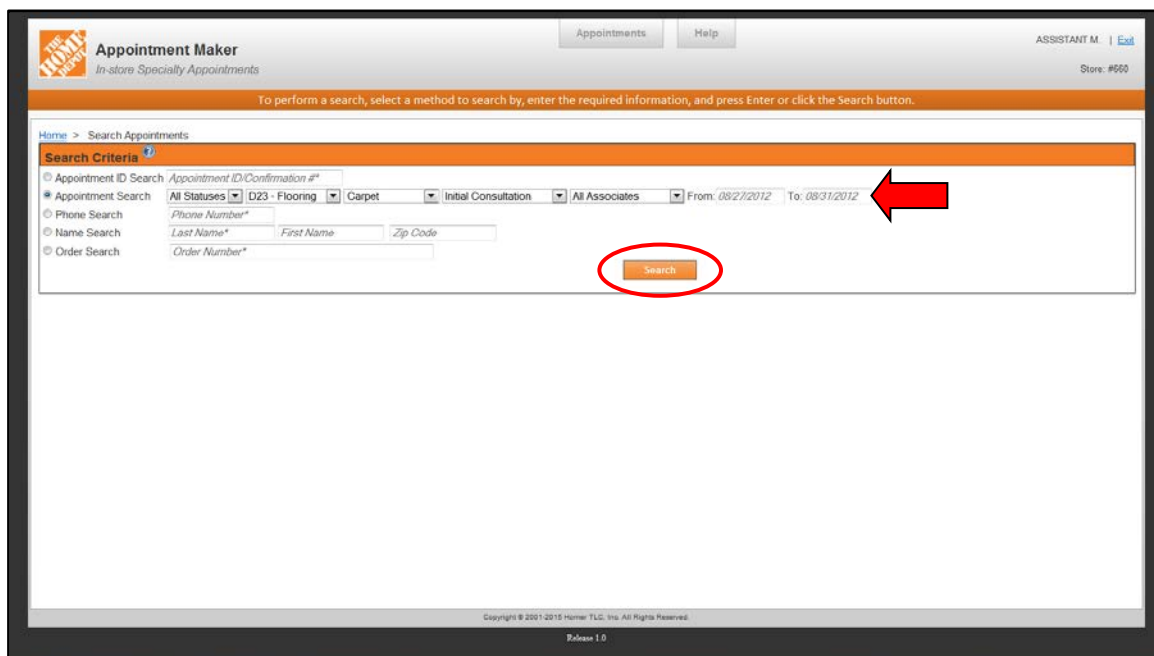
1

Click **Search Appointments** from the Appointments drop-down menu:



2

Select any search criteria from the drop-down menus to search for appointments by your desired method. Click **Search** after selecting search criteria:





Appointment Maker Reference Guide

3

Click on any appointment to view, edit, or print:

to perform a search, select a method to search by, enter the required information, and press enter or click the search button.

Home > Search Appointments

Search Criteria

Appointment ID Search: Appointment ID/Confirmation #*

Appointment Search: All Statuses ▼ D23 - Flooring ▼ Carpet ▼ Initial Consultation ▼ All Associates ▼ From: 08/01/2012 To: 09/30/2012

Phone Search: Phone Number*

Name Search: Last Name* First Name* Zip Code*

Order Search: Order Number*

Search

Appointment List

| Appointment ID | Order | Date/Time | Customer | Associate | Product | Type | Status | Cancellation Reason | Last Modified |
|----------------|--------|------------------------------|-----------------|-------------------|---------------------|----------------------|-------------|---------------------|---------------------|
| 521319 | 607595 | 08/01/2012 07:00 AM-07:45 AM | TIM SIMMONS | MERRY GARWOOD | D23-Flooring Carpet | Initial Consultation | Cancelled | Other | NXB4167 07/26/2012 |
| 521331 | 607574 | 08/01/2012 08:15 AM-08:30 AM | SUGANYA CHANDRA | MERRY GARWOOD | D23-Flooring Carpet | Initial Consultation | Conflicting | | Batch 07/31/2012 |
| 1974323 | 607717 | 08/01/2012 09:45 AM-10:15 AM | BALRAJA LOURDHU | ITEGON | D23-Flooring Carpet | Initial Consultation | Active | | QAT400 08/01/2012 |
| 1974257 | 607783 | 08/01/2012 12:30 PM-01:15 PM | TEST TEST | JULIE WHITEGON | D23-Flooring Carpet | Initial Consultation | Active | | Customer 07/31/2012 |
| 1974326 | 607715 | 08/01/2012 02:30 PM-03:15 PM | BALRAJA LOURDHU | KENNETH LAWRENSON | D23-Flooring Carpet | Initial Consultation | Active | | QAT275 08/01/2012 |
| 1974344 | 607800 | 08/01/2012 06:00 PM-07:00 PM | ASHOK SHAIK | KENNETH LAWRENSON | D23-Flooring Carpet | Initial Consultation | Active | | QAT111 08/01/2012 |
| 1974317 | 607804 | 08/01/2012 07:30 PM-08:00 PM | ASHOK SHAIK | MERRY GARWOOD | D23-Flooring Carpet | Initial Consultation | Active | | QAT111 08/01/2012 |
| 1974341 | 607795 | 08/02/2012 07:30 AM-08:15 AM | TIM SIMMONS | KHIRA VAN VRANKEN | D23-Flooring Carpet | Initial Consultation | Active | | Batch 08/01/2012 |
| 1974342 | 607796 | 08/02/2012 09:00 AM-09:45 AM | TIM SIMMONS | KHIRA VAN VRANKEN | D23-Flooring Carpet | Initial Consultation | Active | | Batch 08/01/2012 |

View/Edit Appointment
View in Calendar
Print Appointment



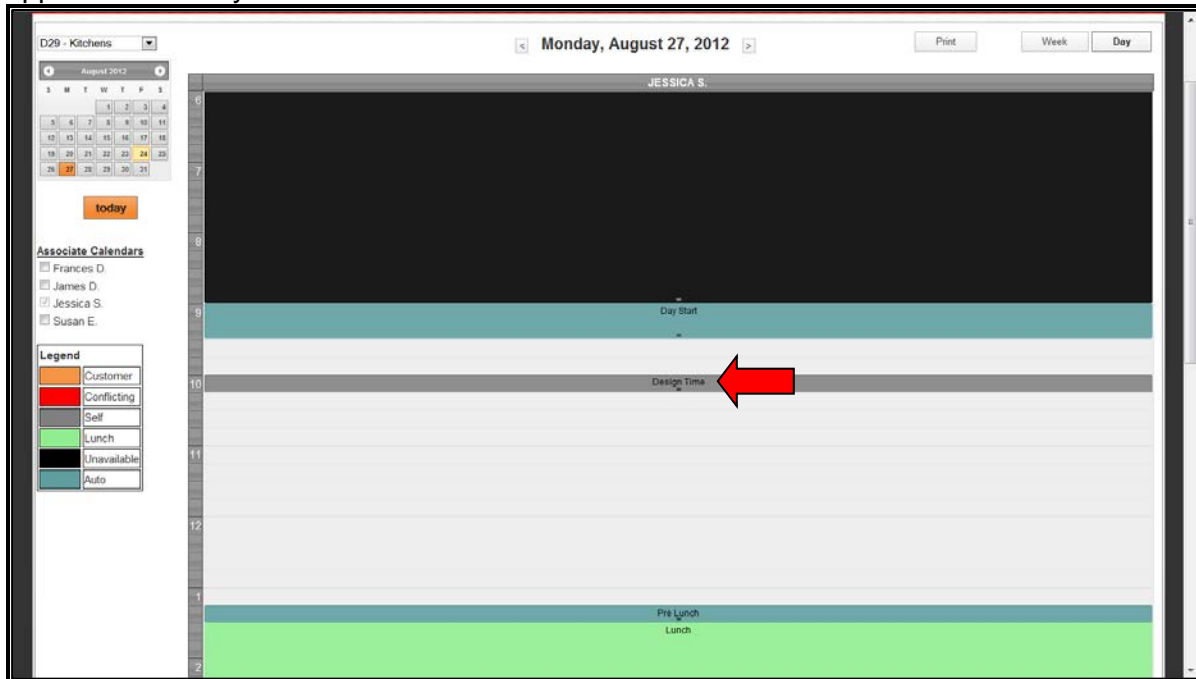
Appointment Maker Reference Guide

Cancelling Appointments

Sometimes the need may arise to cancel an appointment. Complete the following steps to cancel an appointment.

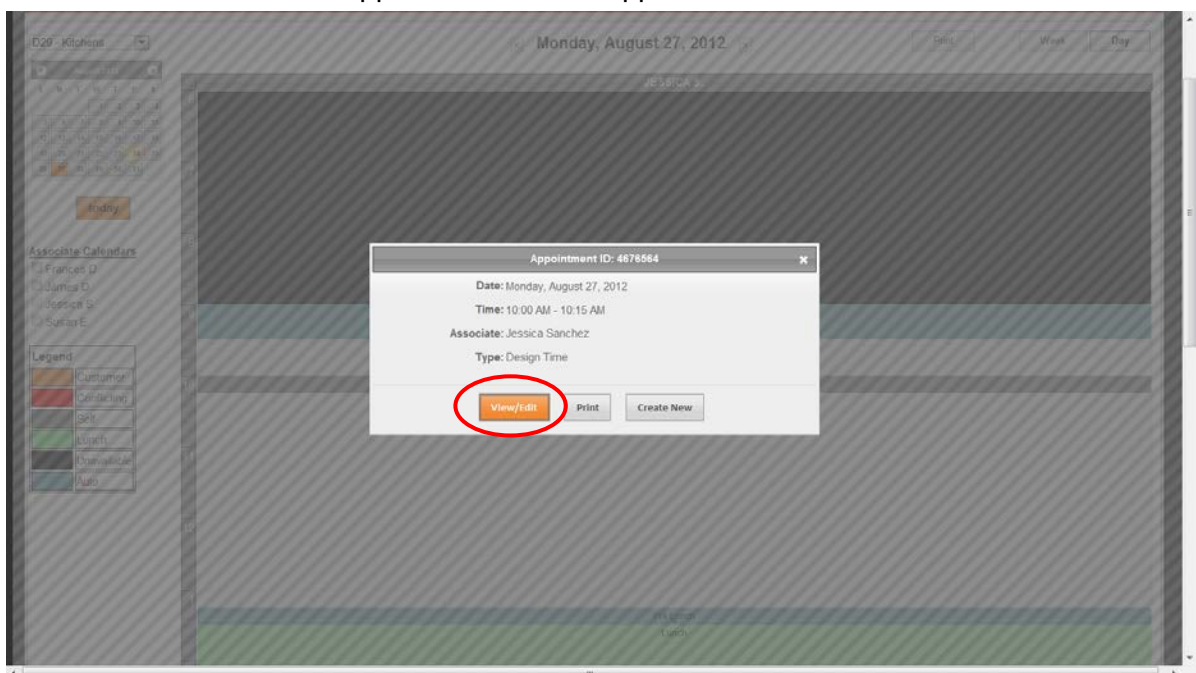
1

From the main appointment schedule (or after searching for an appointment), click on the appointment that you want to cancel.



2

Click **View/Edit** when the appointment ID box appears:





Appointment Maker Reference Guide

3

Click **Delete**:

The screenshot shows the 'Appointment Maker' interface for appointment ID 8417389. The interface includes sections for Customer Appointment, Customer, Quote, Notes, and Tracking. The 'Delete' button is circled in red at the bottom of the page.

| Department | Product Type | Appointment Type | Associate | Date | Time |
|----------------|--------------|----------------------|----------------|------------|---------------------|
| D23 - Flooring | Carpet | Initial Consultation | DEI#163 GIBSON | 10/08/2012 | 09:30 AM - 07:15 AM |

| Name | Home Number | Email |
|--------------|-------------|-----------------------------------|
| DHIVYA THEYA | 9884823591 | DHIVYA_THEYAGARAJAN@HOMEDEPOT.COM |

| Order Number | Job Svc Desc | Status |
|--------------|---------------------|--------|
| 620014 | APPOINTMENT#8417389 | Quote |

| Note Number | Note Date | Note Text |
|-------------|--------------------|---|
| 7 | 10/08/2012 9:15 AM | D23 Appointment#8417389. Scheduled for 10/08/2012 09:30 AM. Created by BMA TESTER275. Product Carpet. Type Initial Consultation |

| Created By | Created Date | Last Modified By | Last Modified Date | Deletion Reason |
|------------|--------------|------------------|--------------------|-----------------|
| GAT275 | 10/08/2012 | GAT275 | 10/08/2012 9:15 AM | |

Buttons: Home, Save, Delete, Create New

4

Select the appropriate reason for canceling from the Cancel Reason drop-down menu:

The screenshot shows the 'Appointment Maker' interface for appointment ID 4670554. A 'Status/Cancel' dialog box is open, displaying the 'Cancel Reason' drop-down menu. The 'CC-Customer Cancelled' option is selected and highlighted by a red arrow.

Dialog Box: Status/Cancel

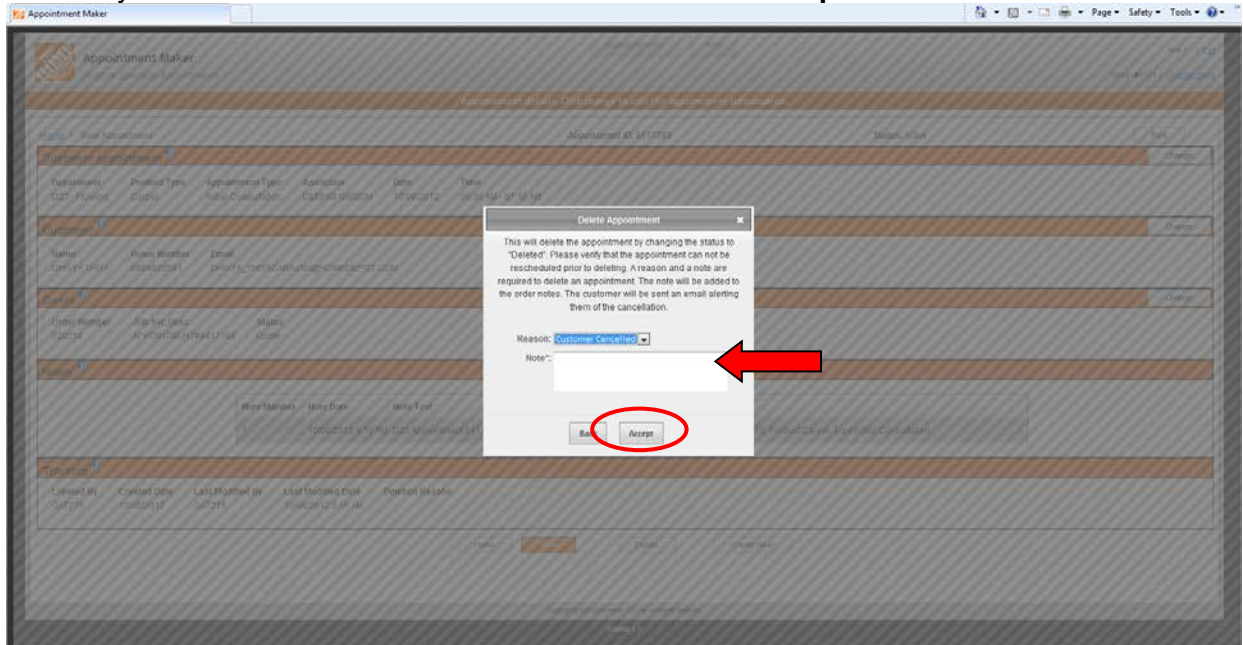
- Status: C-Cancelled
- Cancel Reason: CC-Customer Cancelled
- Note: No-No Show

Buttons: Cancel, Accept

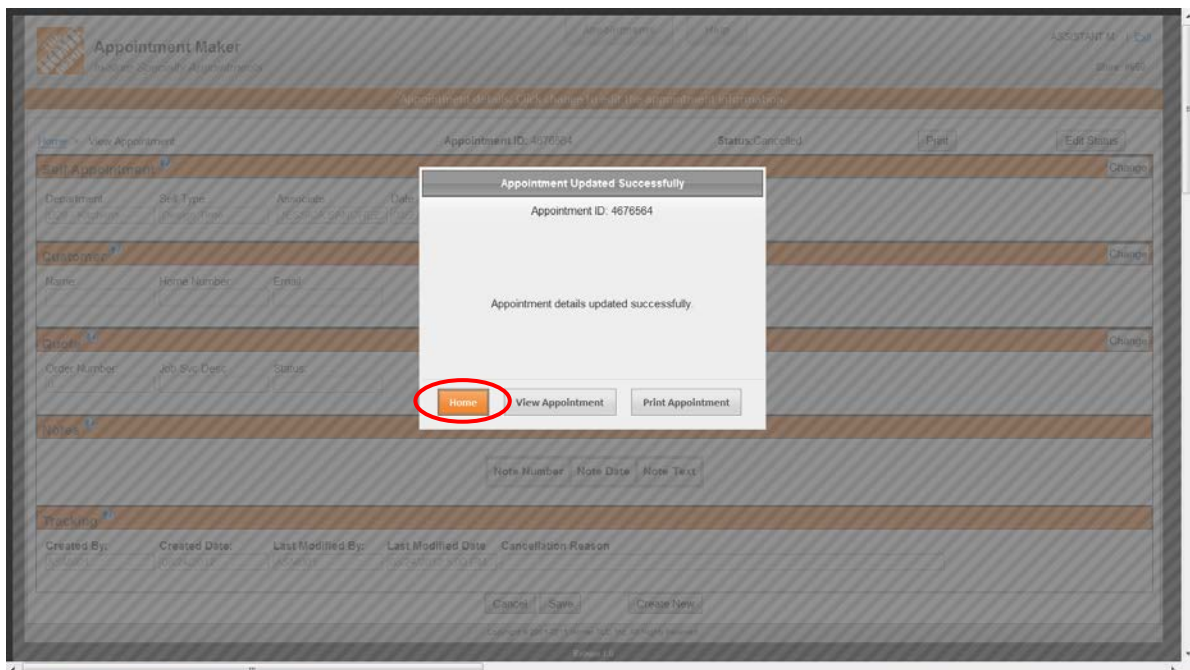


Appointment Maker Reference Guide

- 5 Enter any notes related to the cancellation and then click **Accept**:



- 6 A message will display stating the appointment was cancelled successfully; click **Home**:

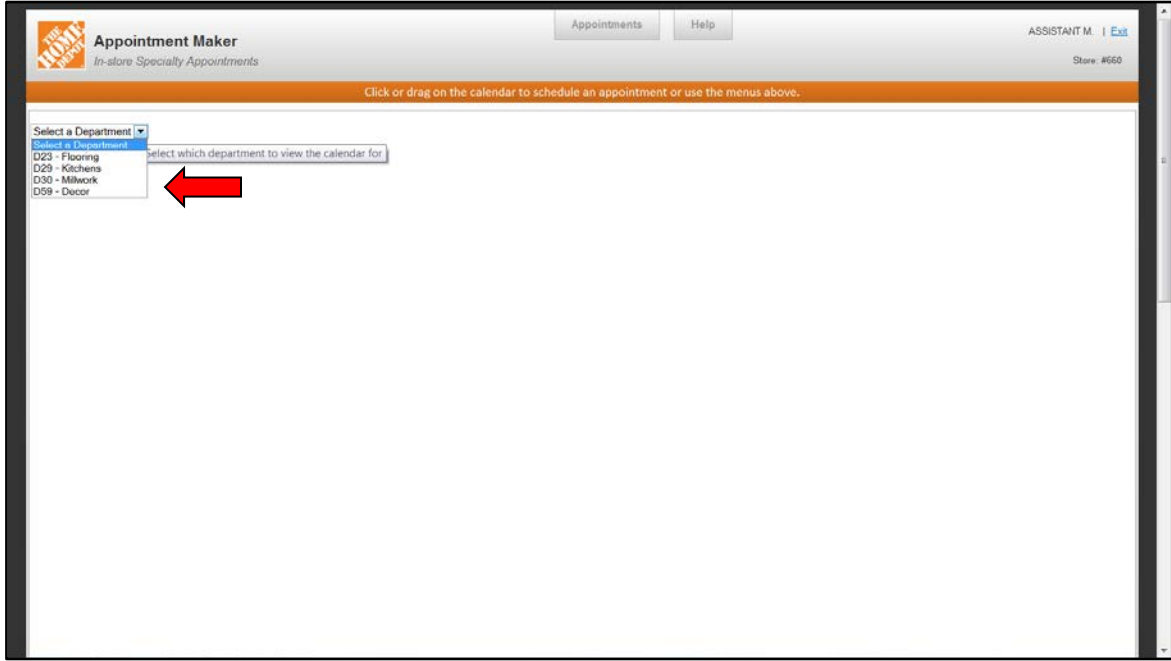
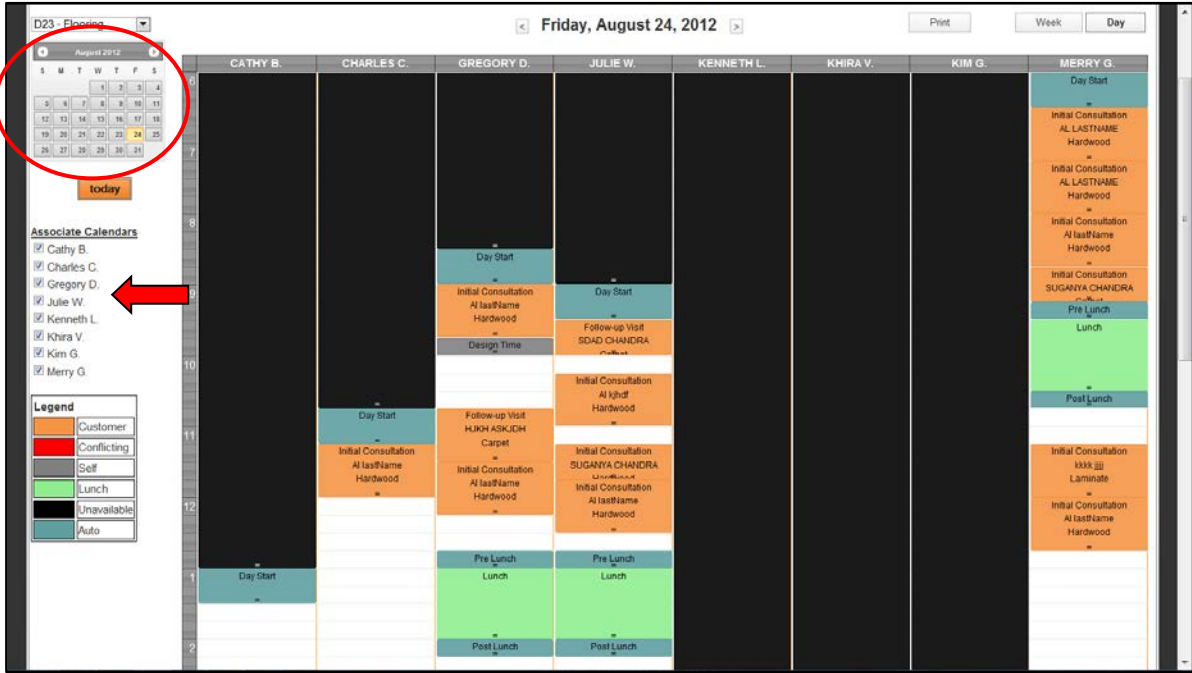




Appointment Maker Reference Guide

Viewing Schedules

To view your appointment schedules in Appointment Maker, complete the following steps.

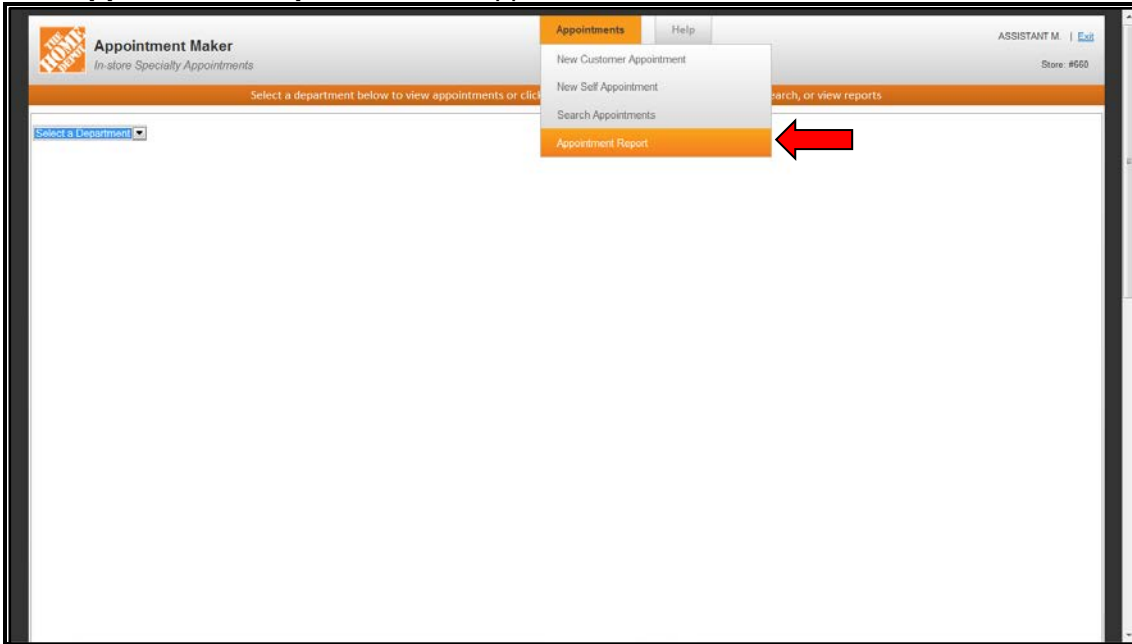
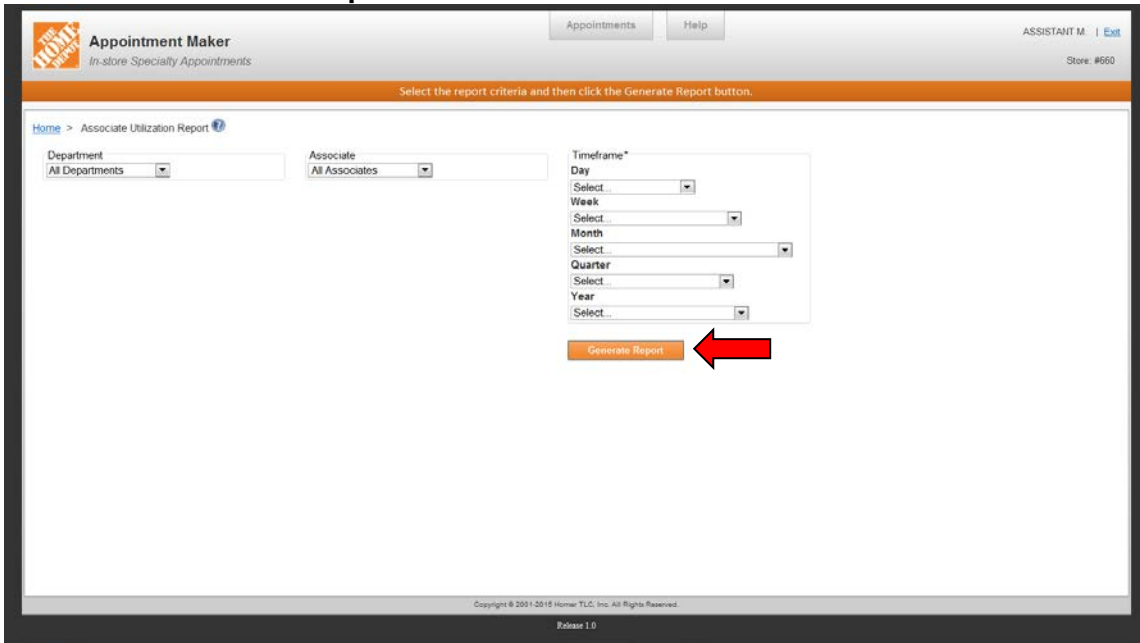
| Step | Action |
|------|--|
| 1 | <p>From the Appointment Maker main menu, select the desired department from the drop down list:</p>  |
| 2 | <p>All associates calendars in the selected department will display on the screen. Click on the calendar to select a specific date; narrow search results by de-selecting the box beside associates' names.</p>  |



Appointment Maker Reference Guide

Creating Utilization Reports

Utilization reports can be created for viewing associates' utilization for given time periods and locations. Use the steps below to create a utilization report.

| Step | Action |
|------|--|
| 1 | <p>Click Appointment Report from the Appointments menu:</p>  |
| 2 | <p>Choose the department (or all departments), associate (or all associates) and timeframe, and then click on Generate Report:</p>  |



Appointment Maker Reference Guide

- 3 The report for the selected criteria will display on the screen; click on Print to print the report:

The Home Depot Appointment Maker
In-store Specialty Appointments
Store #560

Select the report criteria and then click the Generate Report button.

Home > Associate Utilization Report ?

Department: Kitchens
Associate: All Associates
Timeframe*: Day (08/23/2012)
Week: Select
Month: Select
Quarter: Select
Year: Select

Generate Report

Associate Utilization ?

| Associate | Department | Total Hours | Customer Appointments | Self Appointments | Customer Appointments (Hours) | Self Appointments (Hours) | Customer Appointment Utilization % | Self Appointment Utilization % |
|-----------------|--------------|-------------|-----------------------|-------------------|-------------------------------|---------------------------|------------------------------------|--------------------------------|
| JESSICA SANCHEZ | D29-Kitchens | 8 | 3 | 5 | 4.5 | 2 | 56.25 | 25 |
| FRANCES DARLING | D29-Kitchens | 5.75 | 2 | 4 | 3.5 | 1.5 | 60.87 | 26.09 |

Print

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Release 1.0



Appointment Maker Reference Guide

Frequently Asked Questions

General Questions:

Q: What is Appointment Maker?

A: Appointment Maker is a scheduling tool to make in-store meetings for our customers and our specialists/ designers in D23, D29, D30 and D59.

Q: Does Appointment Maker make appointments for in-home Programs like RSW installed windows or cabinet refacing?

A: No, Appointment Maker is only for in-store appointments where a customer wants to meet with a specialist or designer about a new or ongoing project.

Q: Doesn't D29 already have KDAT for appointment scheduling?

Y: KDAT will be retired once Appointment Maker is fully rolled out to the other specialty departments.

Q: Who can make an appointment in the system?

A: Any associate in the store can access Appointment Maker via ESVS or via myApron and enter, modify or cancel any type of appointment for a customer. When Appointment Maker fully deploys to all of the stores, the homedepot.com link will be activated so that a customer can make an initial appointment online.

Q: Who can change an appointment in the system?

A: Any store associate can make, modify or cancel an appointment.

Q: Can appointments be made for the same day that an associate is working?

A: Only appointments made in-store by an associate can be for the same day. The associate should be certain that the Specialist/Designer is available for that time slot.

Q: How often should I check for an appointment?

A: One of the first things you should do, when starting your shift, is to check ESVS for new quotes and notes, or check Appointment Maker. You should check ESVS several times throughout the day.

Q: What happens when an initial appointment is made?

A: If the customer has provided their email address, they will receive a confirmation email. The associate, that the appointment is for, will have a quote opened and note made in ESVS for them. Kitchen Designers will no longer receive an email confirmation; they should consult ESVS.

Q: What happens when follow-up/review, closing appointments, changes or cancellations is made?

A: If the customer has provided their email address, they will receive a confirmation email. The associate, that the appointment is for, will have a note made in ESVS for them. Kitchen Designers will no longer receive an email confirmation; they should consult ESVS notes.



Appointment Maker Reference Guide

Q: What is a “Self-Appointment?”

A: These are appointments where you can block out your time. Examples of when you might block out your time include; a lunch re-schedule, being the “Door Greeter”, Power Hours station, an unscheduled doctor appointment, time you must have to do a design and other times you prefer not to have a customer appointment. Customer Service should always be considered when making a self-appointment and they should only be made when necessary.

Q: How does Appointment Maker know my schedule?

A: FaST will update Appointment Maker every night with the current associate schedule.

Q: What happens if my schedule changes?

A: If the change to the FaST schedule occurs at least the day before, the system will update to reflect the changes. If the change in schedule results in you not being available for an existing appointment, a “Conflict” alert will occur.

Q: What if I am asked to cross-clock to work in another department?

A: Check your calendar for appointments and let your manager know so you ensure that any scheduled customer appointments are done. Make self-appointments to block out your time that you will be in the other department.

Q: I am coded as a Sales Associate but work in specialty? What happens as a result of my not being in Appointment Maker?

A: There will just be fewer appointment time slots in Appointment Maker.

Q: Can I share other associate’s schedule?

A: Yes, you can share and view calendars with other associates in your department.

Q: Can I see the schedule of other associates?

A: Yes, you can see other associates, in your store, schedule by selecting that department.

Q: How do I know what product group a customer is interested in?

A: When an appointment is made, there is a drop down menu to select the department and the type of product the customer is interested in.

Q: What happens when I have an appointment coming up and I am with a walk-in customer?

A: This can be a difficult situation whenever you have two customers at once as everyone’s customer service is paramount. Keeping to reserved times are important so you should honor the scheduled appointment. If you are in a conversation with a customer and you know you have an appointment coming up, tactfully let the walk-in customer know. If your time runs up against the appointment let the customer know that you will find either another associate or a manager to help finish helping them but that you will ensure they are helped. Each situation will be different and you will want to find your own personalized way of saying this. There are many examples, including:

- If a customer has [say] 10 blinds to have cut and you are a specialist that is 15 minutes from a scheduled appointment, find another associate or manager to help you. If there is not an associate or manager that can assist, explain to the customer that you will cut the blinds and offer to have them stop back in [pick some time] and you will have them done, or will call them to let them know they are done (get phone number in either case).



Appointment Maker Reference Guide

- If a customer wants to talk about flooring and you are one hour from an appointment, you are likely to finish helping the customer before your appointment. Be aware of the time.
- A walk-in customer wishes to start a kitchen project and the designer just sat down with another customer and you are not familiar with the showroom. Explain that this often can take an hour and a half to initially discuss a project such as this and tell them that we have an offsite designer that you would like to connect them with in the Collaboration Center at 1-877-355-9817 (M-F: 8:00am -10:00pm, Sat.: 10:00am – 10:00pm and Sunday 9:00am to 9:00pm EST.) If the customer does not wish to speak to an expert on the phone, offer to make an in-store appointment for them with a designer so that they can have the full attention of the designer. If an appointment is acceptable, give the customer a “Kitchen Planning Guide” and let them know that it will provide them excellent information to get started and use Appointment Maker to reserve a time for the customer to speak to a designer.

Q: What kind of appointments can a customer make online?

A: Customers can only make an initial appointment and not for the same day. Other appointment types, or same day appointments, must be done by contacting a store associate. Future releases of Appointment Maker will consider additional appointment types online.

Q: Does the online Appointment Maker show my name or information to the customer?

A: No. The online tool randomly selects from all associates open timeslots and selects one. Only when the customer receives a confirmation email will it provide your first name.

Q: What if an online customer wants to make an initial appointment with a specific associate?

A: They must call the store to make the appointment as we protect your information.

Q: Can you move an appointment to another associate, if needed?

A: Yes. By using the “drag” feature, you can move an appointment to another associate. A note will be created in ESVS for the new associate. The customer should be contacted to tell the name of the new associate they are now meeting with. The original quote will remain in ESVS.

System and Process Related Questions:**Q: How far in advance can an appointment be made?**

A: Up to two weeks. If FaST has loaded your schedule, then those days are available. Days that do not have your schedule loaded will be “grayed out”.

Q: Why are there different appointment lengths for the various product types?

A: The general length of time to sell some products/services is longer than others; a kitchen appointment generally takes longer than flooring, for example. When surveying Specialists and Designers, we found the most usual time for meetings by product/service. If more or less time is actually needed, you can easily drag the time shorter or longer, as needed.

Q: What is a “Conflict” in Appointment Maker?



Appointment Maker Reference Guide

A: A “Conflict” occurs anytime there is an appointment scheduled and an associate becomes unavailable in the system. A “Conflict” is visible as a red task bar. Conflicts must be corrected either by making the associate available for the appointment, calling the customer to reschedule the appointment, or having another associate available for the appointment and the customer notified to the change, if not an initial appointment.

Q: When an initial appointment is made and the quote is made in ESVS, what SKU is used?

A: A “dummy” SKU is created in the quote and are as follows:

D23: SKU 122883

D29: SKU 742531

D30: SKU 121834

D59: SKU 123595

Use this quote to add materials and services and then delete the “dummy” SKU after entering any line item.

Q: If I have an appointment with a customer and am saving a design in 20/20 or M2O, what quote do I use?

A: Select the quote in ESVS that was built for the “initial appointment”. There is no need to create a new quote.

Q: If I have saved a design in 20/20 or M2O and need to make another appointment with the same customer order, what quote do I use?

A: Use the quote in ESVS that was created during the “initial appointment”.

Q: If I am meeting with an “initial appointment” customer and they want to purchase a measure, what do I do?

A: Go to the order in ESVS and create the measure from there.

Q: Where do I find help for Appointment Maker?

A: There is a “HELP” icon on the tool that will take you to a help document. Also, there are several mouse rollovers that will pop up information. If you have technical issues, contact the HELP Desk at 1-800-791-2750.

Q: Will the 1-800-homedepot Call Center make appointments for associates?

A: Only for D23 and D59. The Call Center will warm transfer D30 and D59 customers to your store to set up an appointment.

Department Specific Questions:

Q: Why are there follow-up and closing appointments for D23 when we have HDMS for closing jobs in the home?

A: HDMS closes many of the sales so there are instances where the initial appointment is the only appointment. However, the customer may want to work directly with the store associates so we have follow-up appointments where the customer can come in for whatever reason (perhaps to review flooring



Appointment Maker Reference Guide

choices) and closing appointments where they come in to review the order (perhaps look at carpet seam placements, etc.) and then make the purchase.

Q: What will become of KDAT's Project Tracker?

A: Project Tracker will be retired and associates should use ESVS for project tracking.

Q: How are the schedules handled for flooring and décor?

A: For stores less than \$40 million, the schedules for flooring and décor are combined into one. For stores with sales at \$40 million or more, the schedules for flooring and décor are separate.

Q: For D30, is there anything in the system that tells them they should use the RSW appointment scheduler for scheduling an installed window appointment?

A: Appointment Maker is ONLY for an in-store meeting with an associate. If a customer is interested in Installed Windows, for RSW stores – use the **RSW Online Scheduler** appointment tool in Store Lead Entry **to schedule** a free in-home consultation **with the Day and Time before the customer leaves to store..** For “SFI” stores, call 1-800-homedepot and for “I” stores, set up an install in the store. Future releases of Appointment Maker will address a link to Installed Windows appointment tools.

Management Related Questions:

Q: What happens when an associate calls out or is otherwise unavailable?

A: It is critical that the schedule be reviewed and scheduled customers called to either reschedule the appointment for another time or with another associate. If there is a callout for the opening associate, the Manager-on-Duty (MOD) – or their designate – must review the calendar and contact the customer. If the callout is for an associate other than the opener, the MOD must ensure that either they or the on-the-clock department associate review the calendar and contact any customers scheduled for an appointment to either reschedule that appointment for another time or with another associate.

Q: Who are the associates that are listed in Appointment Maker?

A: Specialists, Designers, Department Supervisors are scheduled each week in Appointment Maker. COS's are scheduled in Appointment Maker if they are scheduled to work in that department as a back-up Specialist/Designer; if they are scheduled in D41, they will not appear in Appointment Maker.

Q: Why are COS's listed as being in Appointment Maker?

A: A COS will only be on the Appointment Maker schedule if they are scheduled out of D41 and in a Specialty Department? They would only be scheduled in a Specialty Department if the ASDS knew the COS was a back-up for that department.



Appointment Maker Reference Guide

Q: What reporting do I have available for Appointment Maker at the Store level?

A: There are four reports that the store level manager can view in Appointment Maker by store, department and associate:

1. Appointments made (number)
2. Appointments cancelled (number)
3. Associate Utilization (percent); the hours of appointments booked / hours worked
4. Sold Orders (Status 700 number from ESVS)

Q: What should a DS do when they need to be away from the sales floor?

A: DSs should make a self-appointment as soon as they know of times they cannot take a customer appointment. Examples of the need for self-appointments would include the weekly staff meeting, MOD duties, etc.

Q: Are there any other reporting levels?

A: Yes. Numbers roll up to the district, region, division and company level with filters for time. Associate reporting only shows up as a number.