Organize your Calendar, Communicate with Clients, and Manage their Information and Documents Using the Customer Relationship Management App

Manage Your Day

!! STOP. *Before reading this article, we recommend that you Read CRM- 1 The Leads and CRM-2 - The Sales Pipeline*

Introduction:

The Customer Relationship Management App is a robust tool designed to support Brokers and Sales Agents from the first contact of a prospective buyer all the way through to the closing of a home. With the Customer Relationship Management App, you can:

- **Collect, manage, forecast, qualify, communicate with, and add opportunities to your Leads.** Go to CRM 1- Leads
- **Move Opportunities through the Sales Pipeline to win deals and process a transaction.** Go to CRM 2 - The Sales Pipeline
- **Make your sales efforts more efficient by allowing you to create tasks, schedule appointments, organize reminders, and communicate 1 to 1 with your clients while keeping all of your client's information and documents organized, handy and secure.** Described in this Article

CRM 3- Manage your Day

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Configure your Meeting or Appointment Reminders and the Appointment Booking Widget

Schedule Meetings or Appointments

View, Edit and Delete Appointments

Opportunities

View, Edit and Delete Opportunities

Get Started

1. **Launch the Customer Relationship Management App (CRM)**

    1.1. Go to the project's **Workplace,**

    1.2. Under the **Customer & Transaction Management** section**,** find the **Customer Relationship Management App** (CRM)

    1.3. **Click** on it

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My Work Day Dashboard

Intro: My **Work Day Dashboard** is the CRM's **Homepage**. This dashboard provides a bird's eye view of your sales activity and workload.

‼ ***The dashboard will be Empty until…***
you begin acquiring Leads and engaging with them. Learn how here.

As soon as you acquire leads, your dashboard will show the following information:

Leads at a Glance
- Total Leads *(The total number of Leads Independent of their Lead Score)*
- Total Active Leads *(The total number of Leads with a Lead Score of 4 or More)*
- Total Active Opportunities *(Total number of Opportunities in the Sales Pipeline)*
- Total Unsubscribed (*(Total number of Potential Leads that have unsubscribed from the project)*

Tasks and Appointments at a Glance:
- Task Details *(A summary of your Completed Tasks)*
- Appointments by Month, Week, or Day *(A summary of the Appointments for the Month, Week, or Day)*
- Task Status *(by Month, Week or Day)*
- Closed Deals *(by This month, Last Month, Last Quarter, This Week, or Today)*

‼ ***Do you want to learn more about Collecting and Managing Leads?*** *Read Chapter 1*

‼ ***Do you want to learn more about moving Opportunities through the Sales Pipeline?*** *Read Chapter 2*

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CRM's Main Navigation Options

On the **Left Side** of the screen, you can find the **Main or Left Navigation Bar**. Use it to navigate to the following sections:

- **My Work Day.** *This is the **Homepage** and it provides you with a bird's eye view of your **Sales Activity** and **Workload**.*
- **Leads.** *Select this option to see a list of all your **Leads** with details about each one.*
- **Opportunities.** *Select this option to go to your **Sales Pipeline**. Click **Archived** from the submenu, to open your **Archived Opportunities**.*
- **Email.** *Select this option to go to your **Inbox** where you can read your emails or compose new ones. Click **Sent** from the submenu, to navigate to your **Sent Emails**.*
- **Calendar**
  *Select this option to view a calendar with your **Tasks**, **Appointments,** and **Closing Dates** for your **Opportunities**.*
- **Tasks**
  *Select this option to see a list of all your **Active** tasks. Select **Completed** from the submenu, to view your **Completed Tasks**.*
- **Appointments** *Select this option to **Schedule Virtual Meetings**, **Phone Meetings,** or **Sales Center Visits** with your contacts.*
- **Settings.** *Select this option to:*
  - ***Integrate** to your **Email Account**, **Create Email Signatures** and **Templates**, and Add **Custom Fields** to your **Lead List**, **Sales Pipeline,** and **Task List.***
  - ***Configure** your **Meeting Settings** as well as allow prospective users to **schedule meetings DIRECTLY** from your **Website** or **Landing page***
  - ***Import or Export Data, Bulk Delete Data,** and view **Data History***

!! STOP. ***Make Sure to Connect to Your Email Account.***
*To see your **Emails** or schedule **Appointments**, you need to **Integrate** with your **Email Account**. Follow These Steps.*

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Define Your Email Settings

2. Connect to your Email Account Through Integrations

!! *Connecting to your Email Account is NOT mandatory, BUT,*
*Connecting enables you to send **Emails** to your contacts and **Schedule Appointments Directly** from your **CRM** app. It also allows prospective users to **Set-up Meetings DIRECTLY** from your **Website** or **Landing pages**.*

1.1. To connect to your **Email Account**, go to the **Left Navigation Bar** and select **Settings**
1.2. On the **Settings Submenu,** under **Email & Calendar Settings,** select **Integrations**
1.3. In the **Email Accounts** section**,** select the **Email Account** of your preference and click **Sign in**
1.4. You **MUST Allow** Bildhive to **Connect** to your account
1.5. This will bring you back to the **Email Accounts Window** and the **Status** will appear as **Connected**
1.6. To disconnect from your email account, click **Disconnect**

!! *The Connection will remain Active until you choose to Disconnect. It doesn't matter if you Exit the Project and return at a Later Time.*

!! TIP: *Do you have a team of Independent Sales Agents working together on a project?*
*It is **Recommended** that **ALL** members integrate with the **Sales Center's Email Address** as opposed to each one using their own. This integration ensures **Visibility** for the **Entire** team, allowing **Management** to **Oversee** all interactions and keeping the **History of Correspondence** in one place.*

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3. Connect to your Video Conferencing Account

3.1. Once you Connect to your Email Account, the **Zoom Video Conferencing Section** displays below the **Email Accounts** section

3.2. As long as you have a Zoom **Account, u**se this section to connect to it

!! ***There are other options for Virtual Appointments besides Zoom.***

- *If you use **Gmail**, you are **Automatically** connected to **Google Meet***
- *If you use **Office 365,** you are **Automatically** connected to **Teams***
- *If you use **Outlook**, you can **ONLY** use **Zoom***

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4. Add a Signature to your Emails

4.1. Go to the **Left Navigation Bar** and select **Settings**
4.2. Under **Email & Calendar Settings,** select **Email Signature**
4.3. The **General** tab is open by default
4.4. Enter the **Information** that you want to appear in your signature
4.5. To add a **Logo** to your signature, click the **Logo** tab next to the General tab and select a, previously uploaded, logo from your **Media library** and click **Select**
4.6. Or **Drag** and **Drop** it in the field
4.7. **To** add a **Social Profile,** first, click on the **Social** tab**,** then, at the bottom, click **Add More**
4.8. On the **Add Social Profile** pop-up**,** first, click the **Arrow** to open the **Dropdown Menu** and select a **Platform**
4.9. Then, click on the **Add Social** field and enter your **Link**
4.10. Click **Create**
4.11. To select a different **Signature Layout,** click the **Design** tab and select a different **Layout**
4.12. Click **Save**
4.13. All your **Emails** will **Automatically** include your **Signature**

‼ *Do you want to Delete your Signature from an Email?*
*If you do not want your **Signature** to appear on your email, simply **Deactivate** it.* *Follow These Steps*.

‼ *About Uploading to the Media Library:*
*If you have not uploaded the **Logo** to your Media Library yet, you can upload it now using the **Content Asset Management System** (CAMS). Please Follow These Steps if you don't know how to upload to the Content Asset Management (CAM). Make sure to follow the Bildhive Asset Preparation Guidelines when preparing your assets.*

‼ *About File Formats and Folders:*
*Different **Sections** in the **Bildhive Platform** require you to upload files in **Specific Formats**. When a section requires a **jpeg or png Format**, only the existing files with those formats will be **Listed** in the Media Library.*

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5. Hide your Signature on an Email

5.1. When **Composing** the email, locate the **Show Email Signature** button below the **Subject** field and **Slide** the radio button to the **LEFT**

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6. Create an Email Template

6.1. To add an email **Template**, go to the **Left Navigation Bar** and select **Settings**
6.2. On the **Settings Submenu,** under **Email & Calendar Settings,** select **Email Templates**
6.3. At the bottom of the Templates Screen, click **Add New Template**
6.4. **Type** the **Subject*** and **Message*,** and **Stylize** the font and paragraph
6.5. Upload an **Attachment,** if needed
6.6. **Save** your **Template**
6.7. On the **Templates List,** to the **Right** of your template, you can **Preview, Edit** or **Delete** a **Template**

*****_Mandatory Fields._

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The CRM Calendar

7. Navigate to your Calendar

7.1. To open your **Calendar,** go to the **Left Navigation Bar** and select **Calendar**
7.2. This opens your **Calendar Screen**

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8. **Introduction to the Calendar Screen**

The CRM calendar displays your Tasks, Appointments, and Estimated Close Dates for your Opportunities (in this context, we'll refer to them simply as opportunities).

The Calendar Screen is divided into three sections:

- The **Month Thumbnail** section, located at the top left of the Calendar screen. It displays a snapshot view of your month.
- The **Overview** section, located in the **Main Stage** of the Calendar screen. It displays a detailed view of your Month, Week, or Day
- **My Calendars** section, located below the Thumbnail Section. Here, you can choose to view all three calendars (Tasks, Appointments, or Opportunities), a combination of two, or just one of them

‼️ ***Your Calendar is Updated in Real Time***
*When **Tasks** are **Assigned**, **Close Dates** are **Estimated**, **Appointments** are **Scheduled**, and potential clients or buyers **Schedule** a **Meeting** through a **Website or Landing Page**, they are **Added** to your **Calendar**.*

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9. View your Scheduled Events in the Month Thumbnail Section

9.1. Find the **Month Thumbnail Section** at the **Top Left** of the **Calendar Screen**
9.2. To **Navigate Between Months**, locate the **Arrows** to the left or right of the name of the month and **Click**
9.3. If a date has a **Red Dot,** this indicates you have an **Event** scheduled for that day
9.4. To view the **Details,** click the **Number** with the **Red Dot**
9.5. The **Event** displays in the **Overview Section** of the **Calendar**
9.6. To open a **Quick View Pop-up** with **Details** of the event, **Click** on the event in the **Overview Section**

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10. View, Edit, or Delete Scheduled Events in the Overview Section of your CRM Calendar

10.1. The **Overview Section** appears to the **Right** of the Calendar Screen
10.2. At the **Top Right** of the **Overview Section,** select the **Month, Week,** or **Day View**
10.3. At the **Top Left** of the **Overview Section,** the name of your **Current Selection** displays
10.4. To **Navigate** to a different month/week/ day, **Click** the **Arrows** to either side of the **Current Selection**
10.5. To open a **Quick View Pop-up** of the **Scheduled Event**, locate it in the main section of the calendar and **Select** it
10.6. To **Edit** the event, **Click** the **Edit** icon at the **Top** of the Quick View Pop-up
10.7. Depending on the **Type** of event, the **Task** Pop-up, **Appointment** Drawer, or **Opportunity's** General Information Screen displays
10.8. Make the necessary **Edits** and **Save**
10.9. To **Delete** the event, **Click** the **Delete Icon** at the **Top** of the Quick View Pop-up and **Confirm** Delete

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11. Select Between the Task, Appointments, and Opportunities Calendars

11.1. To select which calendars to **Display** in the **Overview Section**, go to the **My Calendars** section located below the **Month Thumbnail** section

11.2. By default, all three calendars are **Selected**

11.3. To **Hide** a calendar, click on the **Checkmark** to the **Right** of the calendar you want to hide

11.4. To **Display** it again, click on the square to **Checkmark** it

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Create, Edit, Delete, and View Tasks

!! TIP. *Customize your Task Settings before Adding Tasks*

*By **Default**, Bildhive provides three types of tasks: **To-do, Call,** and **Follow-up**; these cannot be adjusted or deleted. However, you can **Add New Task Types** and edit or delete them as needed.*

12. Customize your Task Settings to Add, Edit or Delete Task Types

1.1. To customize your **Task Settings**, select **Settings** on the **Left Navigation Bar**
1.2. On the **Settings Submenu,** under **Customization,** select **Tasks**
1.3. To add a new **Task** type, at the bottom of the field, click **Add Type**
1.4. Enter a **Name***
1.5. Click **Create**
1.6. To **Edit** or **Delete** a **Task Type,** select **Settings** on the **Left Navigation Bar**
1.7. On the **Settings Submenu,** under **Customization,** select **Tasks**
1.8. In the **Task Type List** locate the **Task Type** you want to **Edit** or **Delete**, go to the **Right** of the field, and click **Edit** or **Delete**,
1.9. Once you make the necessary adjustments, click **Save** or **Delete**

!! How come some Options are Locked?

There are three Default Task Options: To Do, Call, and Follow Up. They cannot be edited or deleted.

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13. Add a Task from the Calendar Screen’s Top Bar

13.1. From the **Left Navigation Bar**, select **Calendar** to open the **Calendar Screen**
13.2. Go to the **Top Right Corner** of the screen and click **Add New**
13.3. From the **Dropdown**, select **Task**
13.4. In the Add New Task **Pop-Up,** provide a **Title** *
13.5. Enter a **Description**
13.6. From the **Task Type Dropdown,** select a **Task Type*** or **Add** a **New Task Type**
13.7. Select a **Priority Level** *
13.8. **Assign** to a **Team Member** *
13.9. In the **What is this task related to?** Dropdown, select **Contact** or **Opportunity**
13.10. Enter the name of the **Primary Contact** *or the **Lot/Model/Elevation** related to the **Opportunity***
13.11. Select a **Due Date**
13.12. Click **Create**

**Mandatory Fields*

14. Add a Task from the ‘My Calendars’ Section of the Calendar Screen

14.1. From the **Left Navigation Bar**, select **Calendar** to open the **Calendar Screen**
14.2. Below the **Month Thumbnail**, find the **My Calendars Section**
14.3. At the top of the section, Click **Add**
14.4. At the top of the Pop-up, make sure the **New Task Tab** is selected
14.5. Provide a **Title** *
14.6. Enter a **Description**
14.7. From the **Task Type Dropdown,** select a **Task Type*** or **Add** a **New Task Type** and select it*
14.8. Select a **Priority Level** *
14.9. **Assign** to a **Team Member** *
14.10. In the **What is this task related to?** Dropdown, select **Contact*** or **Opportunity***
14.11. Enter the name of the **Primary Contact** *or the **Lot/Model/Elevation** related to the **Opportunity***
14.12. Select a **Due Date**
14.13. Click **Create**

******Mandatory Fields*

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!! Tip. *Create Tasks with the Minimum Number of Clicks.*
Follow the chart below:

15. How to Add Tasks from the Different Sections of the CRM

Section	***Steps***	**!! *Notes***
My Work Day Screen	Locate the **Task Details Section** below **Total Leads** Go to the **Bottom** of the section and click **View All** to open the **Task List** At the **Top Right** of the **Task List,** click **Add New Task**	
Left Navigation Bar	Select **Tasks** to Open the **Task List** At the **Top Right** of the **Task List,** click **Add New Task**	
Task List	At the **Top Right** of the **Task List,** click **Add New Task**	
Leads List	**Click** on the **Lead** to **Open** the **Quick View Card** Locate the **Tasks Tab** below the **Opportunities** and **Notes Tab** To the **Right,** click **Add**	*The **Primary Contact** field will be **Locked** and **Pre-populated** with the **Name** of the **Lead***
Lead's Quick View Card	Locate the **Tasks Tab** below the **Notes Tab** and to the **Right** of it, click **Add**	*The **Primary Contact** field will be locked and **Pre-populated** with the **Name** of the **Lead***
Lead's General Information Screen	From the **Lead's Navigation Menu,** select **Tasks** The **Task List** related to that **Lead** displays At the **Top** of the **List,** click the **Plus Icon**	*The **Primary Contact** field will be locked and **Pre-populated** with the **Name** of the **Lead***
Sales Pipeline	On the **Card View,** locate the **Card** of the **Opportunity** to which you wish to add a **Task** **On the List View,** locate the **Row** of the **Opportunity** to which you wish to add a **Task** **Roll Over** the **Three-Dot Action Menu** at the right and select **Add Task**	*The **Related To** field will be locked and **Pre-populated** with the **Lot/Model/Elevation** of the **Opportunity***
Opportunity's Quick View Card	Locate the **Tasks Tab** below the **Notes Tab** and to the **Right** of it, click **Add**	*The **Related To** field will be locked and **Pre-populated** with the **Lot/Model/Elevation** of the **Opportunity***
Opportunity's Detail Page	In the **Opportunity's Navigation Menu,** select **Tasks** The **Task List** related to **Opportunity** will display At the **Top** of the **List,** click **the + Plus Icon**	*The **Related To** field will be locked and **Pre-populated** with the **Lot/Model/Elevation** of the **Opportunity***

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16. Open your Active Tasks List

16.1. To view your **Active Task List**, go to the **Left Navigation Bar**
16.2. Select **Tasks**
16.3. From the submenu, select **Active**

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17. **Introduction to the Active Task List**

All of your **Active Tasks** are listed in your **Active Task List**. By default, the tasks are organized by **Due Date** with **Today's** Tasks at the **Top** followed by **Tomorrow's** Tasks, and **Future** Tasks at the **Bottom**. To filter the tasks by **Priority**, go to the top right of the screen and below the **Add New** button, click **Due Date**. From the dropdown menu, select **Priority Level**. The list will now be **Organized** by priority level, with the **Highest Priority** tasks at the **Top**.

On the list, you can see the following information:

- Title
- Task Type
- Description
- Primary Contact (**Click** on it, to **Open** the Primary Contact's **Quick View Card**)
- Priority Level (Click on the **Arrow** to **Change** the **Priority Level**)
- Due Date
- Assign To
- Comments linked to this Task
- Attachments Linked to this Task
- To mark a task as **Completed**, click on the circle at the **Left** of the Title. (The task will then be moved to the **Completed Task List**)

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18. Edit, Copy, Change Due Date, or Delete Active Tasks

18.1. To **Edit a Task**, **Attach** a **File, Type** a **Comment, Change Priority,** and **Add** an **Assignee,** go to the **Left Navigation Bar,** and select **Tasks** to open the **Active Task List**

18.2. **Locate** the Task, **Scroll** right, click the **Three-Dot Action Menu,** and select **Edit** to display the **Task Pop-up**

18.3. Then**,** make your **Edits**

18.4. To **Attach** a file, click **Attach Files,** to open your **Media Library** and select a file

18.5. To type a **Comment**, scroll to the bottom of the Pop-up, and type your comment

18.6. To change the **Priority Level**, go to the **Top Right**, click the **Priority Level,** and select a **New One**

18.7. To add an **Assignee,** go to the **Assignee Section** and click the **Plus Icon**

18.8. To change the **Due Date,** click on the **Date** and select a **New One**

18.9. From the **Task's Three-Dot Action Menu,** you can also **Copy** the **Task, Change** the **Due Date** and **Delete** the **Task**

!! ***Do you want to change the Task Type?***

*Locate the **Lead** or **Opportunity** to whom this task belongs, from the **Quick View Card**, or the **Three-Dot Action Menu**, click **Edit** to open the **General Information Screen**. Once it opens, go to the **Lead's** or **Opportunity's Navigation Bar** and select **Tasks**. Locate the **Task** in the list, and click the **Edit Icon**. **Change** the **Task Type** and click **Save**.*

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19. How to View, Edit and Delete Tasks from the Different Sections of the CRM

Section	***Steps***	**!! *Notes***
My Work Day Screen	Go to the **Bottom** of the **Task Details** or **Task Status** section and click **View All** to open the **Task List** Scroll **Right** and click the **Three-Dot Action Menu**	***Heads-Up:*** *This is the **ONLY PLACE** where you can **Copy Tasks**, Add **Comments** and Upload **Attachments** for this Task. **BUT**, It is not possible to **Edit** the **Task Type from here***
Left Navigation Bar	Select **Tasks** to Open the **Task List** Scroll **Right** and click the **Three-Dot Action Menu**	***Heads-Up:*** *This is the **ONLY PLACE** where you can **Copy Tasks**, Add **Comments** and Upload **Attachments** for this Task. **BUT**, It is not possible to **Edit** the **Task Type from here***
Task List	Scroll **Right** and click the **Three-Dot Action Menu**	***Heads-Up:*** *This is the **ONLY PLACE** where you can **Copy Tasks**, Add **Comments** and Upload **Attachments** for this Task. **BUT**, It is not possible to **Edit** the **Task Type from here***
Leads List	**Click** on the **Lead** to **Open** the **Quick View Card** Locate the **Tasks Tab** below the **Opportunities** and **Notes Tab**	*You can **View the Tasks** and Mark them as **Done,** but **Can't Edit** them*
Lead's Quick View Card	Locate the **Tasks Tab** below the **Notes Tab** and to the **Right** of it, click **Add**	*You can **View** the **Tasks** and Mark them as **Done,** but **Can't Edit** them*
Lead's General Information Screen	From the **Lead's Navigation Menu,** select **Tasks** The **Task List** related to that **Lead,** opens To the **Left** of each **Task**, select the **View, Edit,** or **Delete Icons**	*You can **View, Delete** and make **All Edits.*** ***BUT**, you can't **Copy Tasks**, Add **Comments** or Upload **Attachments.***
Sales Pipeline	On the **Card View,** locate the **Card** of the **Opportunity or,** on the **List View,** locate the **Row** of the **Opportunity.** Go to the **Three-Dot Action Menu** at the right and select **Edit Opportunity** to open the **General Information Screen** Go to the **Opportunity's Navigation Menu and select Tasks** **Locate the Task** and select the **Edit Icon**	*You can **View, Edit all the information and Delete it.*** ***BUT**, from this section, you can't **Copy Tasks**, Add **Comments,** or Upload **Attachments.***
Opportunity's Quick View Card	Locate the **Tasks Tab** below the **Notes Tab** and to the **Right** of it, click **Add**	*You can **View the Tasks** and Mark them as **Done,** but **Can't Edit** them*
Opportunity's General Information Screen	From the **Opportunity's Navigation Menu,** select **Tasks** The **Task List** related to this **Opportunity,** opens To the right of the Opportunity, select the **View, Edit,** or **Delete Icons**	*You can **View, Delete** and make **All Edits.*** ***BUT**, you can't **Copy Task**, Add **Comments** or Upload **Attachments.***

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20. Open your Completed Tasks List

20.1. To view your **Completed Tasks List**, go to the **Left Navigation Bar**
20.2. Select **Tasks**
20.3. From the submenu, select **Completed**

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21. Introduction to the Completed Task List

All of your **Completed Tasks** are listed in this **List**. By default, the tasks are organized by **Due Date** with the **Oldest** tasks at the **Top**.

On the list, you can see the following information:

- Title
- Primary Contact (**Click** on it, to **Open** the Primary Contact's **Quick View Card**)
- Priority Level (Click on the **Arrow** to **Change** the **Priority Level**)
- Due Date
- Task Owner
- Comments added to the task
- Linked or Uploaded Documents

‼ ***Do you want to View, Edit or Delete Completed Tasks?***
Follow the steps on This Chart

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Configure your Meetings or Appointments

‼ TIP. *Customize your Appointment Settings before Adding Appointments*

*By **Default**, Bildhive provides three **Types** of **Appointments**: **Virtual Meetings, Sales Centre,** and **Home Visits**; these cannot be adjusted or deleted. However, you can **Add New Appointment Types** and edit or delete them as needed.*

22. Open the Meetings Settings

22.1. On the **Left Navigation Bar,** Select **Settings**

22.2. On the **Settings Submenu,** under **Customization,** select **Meetings**

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23. Configure the Meeting Dates, Types, Times, Duration, Minimum Notice Time, and Buffer Time

23.1. On the **Meeting Settings** screen, select **Rolling Weeks** or **Custom Date Range** and select a **Range***

23.2. From the **Select your Preferred Meeting Type*** dropdown, select all the options that apply

23.3. Enter the **Days** of the **Week** and **Available Time Ranges*** when people can **Book** a meeting in your calendar

23.4. From the **Duration** dropdown, select the **Length*** of the meetings

23.5. From the **Minimum Notice Time** dropdown, select the minimum time between when a meeting is **Booked** and when it can **Take Place**

23.6. From the **Buffer Time** dropdown, select how much **Time** should pass **Between** the **End** of a **Meeting** and the **Beginning** of the **Next One**

*Mandatory Fields.

!! TIP. ***Provide More Than One Duration Option.***
*This way, the client can **Decide** whether they need a **Short** or a **Long** meeting.*

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Configure your Meeting Reminders

24. Schedule a Pre-Meeting Reminder for Yourself

24.1. In the **Pre-meeting Reminder Section**, select how long before a meeting you would like to receive a **Reminder Email**

24.2. If you are **Logged** into **Bildhive** at the time, you will see a **Pre-meeting Notification** pop up

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25. The Appointment Booking Widget

‼ ***What is the Appointment Widget?***

*It is a **Component** that you can add to a **Website** or **Landing Page** to enable prospects and customers to **Book Appointments.** It also allows **Clients** to **Reschedule Appointments** directly from their **Confirmation Emails**.*

Click Here to Learn How to add it to your Website or Landing Page.

‼ ***What happens If Multiple team Members are logged into the Appointment Booking Widget?***

*The prospects and customers will be able to select from the **Combined Appointment Options** entered by the members of the **Sales Team**. Meetings will be assigned in a **Round Robin** fashion based on when team members **Configure** their **Meeting Parameters**.*

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26. Allow the Clients to Reschedule their Appointments from their Confirmation Email

26.1. To allow your Prospective clients to **Reschedule** their **Appointments**, you need to **Copy and Paste** the **Appointment Widget URL** from the **Website/ Landing** page that **Contains** it

26.2. If the Website or Landing Page **Have Not Been Published**, you **Must** use the **URL** of the **Preview**

26.3. To find it, **Open** the **Website & Landing Page Builder** (WLPB)

26.4. **Select** the **Project** that contains the **Appointment Widget**

26.5. **Preview** the **Page** that **Contains** the **Widget** and copy the **URL** that appears in the **Top Bar**

26.6. Then, go back to the **CRM,** and from the **Left Navigation Bar**, click **Settings**

26.7. On the **Settings Submenu,** under **Customization,** select **Meetings**

26.8. On the **Meeting Settings Screen**, Scroll to the **Appointment Widget URL** section and **Paste** the **Widget URL**

!! STOP*.* ***Once the Website or Landing is Published, you MUST replace the URL with the URL of the Live Site.***

*Just **Open** the **published website**, go to the **page** that contains the **Appointment Widget**, **copy** the **URL,** and paste it into the **Appointment Widget URL** section of the CRM's **Meeting Settings.***

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27. What Users See in the Appointment Booking Widget on the Website

Team Members Define the following in the CRM:	Users see the following on the website:
When a Meeting can be Scheduled ***Info:*** *These consist of a range of dates when people can book a meeting.*	**A calendar showing the available dates when they can meet with a team member.** ***Info:*** *Meeting dates and days are based on availability, defined by the team members in the CRM.* **!!** *Calendar days during which team members are unavailable will be grayed out.*
Preferred Meeting Type ***Info:*** *Select Phone, Virtual, and /or Sales Center Meeting.*	**Buttons showing the types of Meetings Available** **!!** *If the Sales Team only offers Phone Meetings, only a Phone Button is visible.*
Available Times ***Info:*** *These consist of the days and times of the week on which the team member is available for a meeting.*	**A list of available time slots for users to choose from.** ***Info:*** *This is determined by the Available Times defined by the team members, as well as the Buffer Time and the Minimum Notice Time.*
Duration ***Info:*** *The Team member selects one or more time periods during which meetings can take place.*	**A series of options with different time periods.** ***Info:*** *These are based on the time periods selected by the team member. For example, 30 minutes, 45 minutes, and an hour*
Minimum Notice Time ***Info:*** *The team member defines the minimum time between when a meeting is scheduled and when it can take place.*	***Info:*** *A meeting's first time slot is determined by the time of day plus the Minimum Notice Time. If the time is 12:00 and the Minimum Notice Time selected by the team member is 15 minutes, then the first time slot offered is 12:15.*
Buffer Time ***Info:*** *The team member determines how much time should pass between one meeting and the next.*	***Info:*** *The different time slots will be determined by the Duration plus the Buffer time. So, continuing with the previous example, if the duration selected is 30 minutes and the buffer time is 10 minutes, the second time slot offered will be 12:55 (12:15 + 30-minute duration + 10-minute buffer).*

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28. Turn On the Confirmation Email Option and Configure the Email

28.1. To send a **Confirmation Email** to the **Client** and allow them to **Reschedule** or **Cancel** an **Appointment**, go to the **Left Navigation Bar** and select **Settings** then **Meetings**

28.2. Scroll down to the **Email Notifications** section, and make sure the **Confirmation Email** option is **Turned On**

28.3. To **Turn** it **Off, Slide** the button to the **Left**

28.4. You can upload a **Logo**

28.5. Then Enter a **Subject*** and a **Preheader***

28.6. You can **Preview** the Email and send a **Test Email**

*Mandatory Fields.

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29. Activate the Pre-meeting Reminder Email

29.1. If you want your prospects/ customers to **Receive** a **Pre-meeting Reminder Email**, go to the **Bottom** of the **Email Notifications Section** and **Slide** the **Pre-Meeting Reminder Email** slider to the **Right**

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Schedule Meetings or Appointments

30. Schedule an Appointment from your Calendar's Top Bar

30.1. From the **Left Navigation Bar**, select **Calendar** to open the **Calendar Screen**
30.2. Go to the **Top Right Corner** of the screen and click **Add New**
30.3. From the **Dropdown**, select **Appointment**
30.4. In the **Add New Appointment** Pop-Up**,** provide a **Title** *
30.5. Select a **Date** *
30.6. Enter **Start*** and **End*** Times
30.7. Enter **Primary Contact** *
30.8. **Assign** it **To** a Team Member*
30.9. If applicable, enter Guest Email(s)
30.10. Select the **Type*** of Appointment or add a new one
30.11. If the Appointment is **Virtual**, enter the **Meeting Link** *
30.12. **Assign** the appointment to a **Team Member** *
30.13. If applicable, enter a **Guest Email**
30.14. From the **Dropdown,** select **Appointment Type** *
30.15. If applicable, enter a **Location**
30.16. Click **Setup a Reminder** and select the number of minutes or days before the meeting you wish to receive a **Reminder Email**
30.17. Enter some **Notes** for the appointment, if needed
30.18. Click **Create**

*****_Mandatory Fields_

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31. Schedule an Appointment from the ‘My Calendars’ Section of your Calendar

31.1. From the **Left Navigation Bar**, select **Calendar** to open the **Calendar Screen**
31.2. Below the **Month Thumbnail**, find the **My Calendars Section**
31.3. At the top of the section, Click **Add**
31.4. At the **Top** of the **Pop-Up**, select the **New Appointment Tab**
31.5. In the Add New Appointment **Pop-Up,** provide a **Title** *
31.6. If necessary, adjust the **Date** *
31.7. Adjust the **Start*** and **End*** Times
31.8. Enter **Primary Contact** *
31.9. **Assign** the appointment to a **Team Member** *
31.10. From the dropdown, select the **Appointment Type***
31.11. If applicable, enter a **Location**
31.12. Click **Setup a Reminder** and select the number of minutes or days before the meeting you wish to receive a **Reminder Email**
31.13. Enter some **Notes** for the appointment, if needed
31.14. Click **Create**

*****_Mandatory Fields_

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!! Tip. ***Create Appointments with the Minimum Number of Clicks.***
Follow the chart below:

32. Schedule Meetings or Appointments from the Different Sections of the CRM

Section	***Steps***	**!!** ***Notes***
My Work Day Screen	Locate the **Appointment Section** at the Top Right Go to the **Bottom** of the section and click **View All** to open the **Appointment List** At the **Top Right** of the **List,** click **Add New Appointment**	
Left Navigation Bar	Select **Appointments** to Open the **Appointment List** At the **Top Right** of the **List,** click **Add New Appointment**	
Appointment List	At the **Top Right** of the **List,** click **Add New Appointment**	
Leads List	**Select** the **Lead** to **Open** the **Quick View Card** Locate the **Appointment Tab** below the **Task Tab** To the **Right,** click **Add**	*The **Primary Contact** field will be **Locked** and **Pre-populated** with the **Name** of the **Lead***
Lead's Quick View Card	Locate the **Appointment Tab** below the **Tasks Tab** and to the **Right** of it, click **Add**	*The **Primary Contact** field will be locked and **Pre-populated** with the **Name** of the **Lead***
Lead's General Information Screen	From the **Lead's Navigation Menu,** select **Appointments** The **List** of **Appointments** related to that **Lead** displays At the **Top** of the **List,** click the **Plus Icon**	*The **Primary Contact** field will be locked and **Pre-populated** with the **Name** of the **Lead***
Sales Pipeline	On the **Card View**, locate the **Card** of the **Opportunity** for whom you wish to schedule an appt. **On the List View,** locate the **Row** of the **Opportunity** for whom you wish to schedule an appt. **Roll Over** the **Three-Dot Action Menu** at the right and select **Add Appointment**	*The **Related To** field will be locked and **Pre-populated** with the **Lot/Model/Elevation** of the **Opportunity***
Opportunity's Quick View Card	Locate the **Appointments Tab** below the **Tasks Tab** and to the **Right** of it, click **Add**	*The **Related To** field will be locked and **Pre-populated** with the **Lot/Model/Elevation** of the **Opportunity***
Opportunity's Detail Page	In the **Opportunity's Navigation Menu,** select **Appointments** The **List of Appointments** related to this **Opportunity** displays At the **Top** of the **List,** click **the + Plus Icon**	*The **Related To** field will be locked and **Pre-populated** with the **Lot/Model/Elevation** of the **Opportunity***

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33. View, Edit, and Delete Appointments from the Different Sections of the CRM

Section	***Steps***	**!! *Notes***
My Work Day Screen	Go to the **Top Right** and find the **Appointments Section** at the **Bottom Right** of the Section, click **View All** to open the **Appointment List** Scroll **Right** and click the **Three-Dot Action Menu**	*You can **Preview**, **Edit** and **Delete** the Appt. To **BUlk Delete**, Select more than one Appointment, and at the **Top Left**, click the **Delete Button***
Left Navigation Bar	Select **Appointments** to Open the **Appointments List** Scroll **Right** and click the **Three-Dot Action Menu**	*You can **Preview**, **Edit** and **Delete** the Appt. To **Bulk Delete**, Select more than one Appointment, and at the **Top Left**, click the **Delete Button***
Task List	Scroll **Right** and click the **Three-Dot Action Menu**	*You can **Preview**, **Edit** and **Delete** the Appt. To **Bulk Delete**, Select more than one Appointment, and at the **Top Left**, click the **Delete Button***
Leads List	**Click** on the **Lead** to **Open** the **Quick View Card** Locate the **Appointments Tab** below the **Tasks Tab**	*Click on the **Arrow** to the **Left** to display your list of appointments. To the **Right** of each one, you can **Edit** or **Delete**.*
Lead's Quick View Card	Locate the **Appointments Tab** below the **Tasks Tab** and to the **Left** of it**,** click **the Arrow to display the appointments for this Lead**	*Click on the **Arrow** to the **Left** to display your list of appointments. To the **Right** of each one, you can **Edit** or **Delete**.*
Lead's General Information Screen	From the **Lead's Navigation Menu,** select **Appointments** The **List of Appointments** related to the **Lead** displays To the **Right** of each **Appointment**, select the **View, Edit, or Delete Icons**	*You can **Preview**, **Edit** and **Delete** the Appt.*
Sales Pipeline	On the **Card View,** locate the **Card** of the **Opportunity or,** on the **List View,** locate the **Row** of the **Opportunity** Go to the **Three-Dot Action Menu** at the right and select **Edit Opportunity** to open the **General Information Screen** Go to the **Opportunity's Navigation Menu and select Appointments** **Locate the Appointment** and select **View**, **Edit or Delete**	*You can **Preview**, **Edit** and **Delete** the Appt.*
Opportunity's Quick View Card	Locate the **Appointments Tab** below the **Tasks Tab** and to the **Left** of it**,** click **the Arrow to display** the **appointments** for this **Opportunity**	*You can **Preview**, **Edit** and **Delete** the Appt.*
Opportunity's General Information Screen	From the **Opportunity's Navigation Menu,** select **Appointments** The **List of Appointments** related to the Opportunity displays To the right of the Opportunity**,** select the **View, Edit, or Delete Icons**	*You can **Preview**, **Edit** and **Delete** the Appt.*

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34. Open your Sales Pipeline to see your Active Opportunities

34.1. To view your **Active Opportunities List**, go to the **Left Navigation Bar** and select **Opportunities**

34.2. On the Submenu, make sure **Sales Pipeline** is selected

!! ***Read*** *Chapter Two - The Sales Pipeline*
*and learn all about the **Sales Pipeline** and how to **Move Opportunities** through it.*

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35. Add an Opportunity from the Top Bar of the Calendar Screen

35.1. From the **Left Navigation Bar**, select **Calendar** to open the **Calendar Screen**
35.2. Go to the **Top Right Corner** of the screen and click **Add New**
35.3. From the **Dropdown**, select **Opportunity**
35.4. In the **Add Opportunity** pop-up, select a **Lot*** and an **Elevation***
35.5. Enter the **Primary Contact*** or skip this step if the contact is predefined
35.6. Select an **Estimated Opportunity Close Date***
35.7. From the **Dropdown Menu,** select a **Deal Stage*** or **Add** a **New Stage**
35.8. Add a **Value***
35.9. From the **Dropdown Menu,** select a **Deal Source*** or **Add a New One**
35.10. Select **Visibility**
35.11. The **Sales Owner(s)*** field is pre-populated with whoever created the **Opportunity** you can select more than one owner from the dropdown
35.12. In the field titled **Interested In,** describe the **Opportunity**
35.13. Click **Create**

*****_Mandatory Fields_

!! ***Read*** _Chapter Two - The Sales Pipeline_
and learn all about the **Sales Pipeline** and how to **Move Opportunities** through it.

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36. Add an Opportunity from the 'My Calendars' Section of the Calendar Screen

36.1. From the **Left Navigation Bar**, select **Calendar** to open the **Calendar Screen**
36.2. Below the **Month Thumbnail**, find the **My Calendars Section**
36.3. At the **Top** of the section, Click **Add**
36.4. At the **Top** of the **Pop-up**, make sure the **New Opportunity Tab** is selected
36.5. In the **Add Opportunity** tab, select a **Lot*** and an **Elevation***
36.6. Enter the **Primary Contact*** or skip this step if the contact is predefined
36.7. Select an **Estimated Opportunity Close Date***
36.8. From the **Dropdown Menu,** select a **Deal Stage*** or **Add** a **New Stage**
36.9. Add a **Value***
36.10. From the **Dropdown Menu,** select a **Deal Source*** or **Add a New One**
36.11. In the **Probability** Field**, Keep 20%** or **Adjust** the Win Probability
36.12. Select **Visibility**
36.13. The **Sales Owner(s)*** field is pre-populated with whoever created the **Opportunity** you can select more than one owner from the dropdown
36.14. In the field titled **Interested In,** describe the **Opportunity**
36.15. Click **Create**

**Mandatory Fields*

!! *Read* *Chapter Two - The Sales Pipeline*
*and learn all about the **Sales Pipeline** and how to **Move Opportunities** through it.*

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!! Tip. *Create Opportunities with the Minimum Number of Clicks.*

Follow the chart below:

37. How to Add Opportunities from the Different Sections of the CRM

Section	***Steps***	**!! *Notes***
My Work Day Screen	At the **Top**, click Total **Active Opportunities** to open the **Sales Pipeline** Then, at the **Top Right,** click **Add New Opportunity**	
Left Navigation Bar	Select **Opportunities** to open the **Sales Pipeline** Then, at the **Top Right,** click **Add New Opportunity**	
Sales Pipeline	At the **Top Right,** click **Add New Opportunity**	
Leads List	**Click** on the **Lead** to **Open** the **Quick View Card** Click the **Convert Lead** Orange Button	
Lead's Quick View Card	Click the **Convert Lead** Orange Button	
Lead's General Information Screen	At the **Top Left,** on the **Quick Info Square,** click **Convert Lead**	

!! *Read* *Chapter Two - The Sales Pipeline*

*and learn all about the **Sales Pipeline** and how to **Move Opportunities** through it.*

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38. View, Edit, and Delete Opportunities from the Different Sections of the CRM

Section	***Steps***	**!!** ***Notes***
My Work Day Screen	At the **Top**, click Total **Active Opportunities** to open the **Sales Pipeline** Then**,** locate the **Opportunity** To the right, click the **Three-Dot Action Menu** Then**,** select an **Action**	*You can **Preview**, **Edit**, and **Delete**,* ***In Addition,** you can Add **Notes**, add **Tasks**, Add **Appointments**, **Email**, mark as **Lost**, mark as **Won** or **Process** a **Transaction***
Left Navigation Bar	Select **Opportunities** to open the **Sales Pipeline** Then**,** locate the **Opportunity** To the **Right**, click the **Three-Dot Action Menu** Then**,** select an **Action**	*You can **Preview**, **Edit**, and **Delete**,* ***In Addition,** you can Add **Notes**, add **Tasks**, Add **Appointments**, **Email**, mark as **Lost**, mark as **Won** or **Process** a **Transaction***
Lead's Quick View Card	Locate the **Opportunities Tab** below the **Tasks Tab** and to the **Left** of it**,** click the **Arrow** to display the **Opportunities** To the **Right** of the Opportunity**,** click the **Edit** or **Delete Icons**	*You can **ONLY** **Preview**, **Edit**, and **Delete**.*
Lead's General Information Screen	On the General Information Screen, go to the **Lead's Navigation Menu, and** select **Opportunities** The **List of Opportunities** related to the **Lead** displays To the **Right** of each **Opportunity**, select the **View, Edit, Open Pipeline, or Delete Icons**	*You can **Preview**, **Edit**, and **Delete**,* ***In Addition,** you can open the **Sales Pipeline***
Sales Pipeline	On the **Card View,** locate the **Card** of the **Opportunity** or**,** on the **List View,** locate the **Row** of the **Opportunity** Go to the **Three-Dot Action Menu** at the right and select an **Action**	*You can **Preview**, **Edit**, and **Delete**,* ***In Addition,** you can Add **Notes**, add **Tasks**, Add **Appointments**, **Email**, mark as **Lost**, mark as **Won** or **Process** a **Transaction***
Opportunity's Quick View Card	Open the **Quick View Card**, and select an Action. Click the Details Tab to view the Opportunity's Details	*You can **Preview**, **Edit**, and **Delete**,* ***In Addition,** you can **Email**, Add **Notes**, add **Tasks**, Add **Appointments**, **View Form Submissions, Attachments,** and a **Timeline** of **Activities***
Opportunity's General Information Screen	From here, you can View, Edit and Delete all the Details about this opportunity	*You can **Preview**, **Edit**, and **Delete**,* ***In Addition,** you can **Email**, Add Secondary Contacts or Purchasers, add **Notes**, add **Tasks**, Add **Appointments**, **View Form Submissions, Attachments** and a **Timeline** of **Activities***
Archived Opportunities	From the Left Navigation Bar, select **Opportunities** and from the **Submenu,** select **Archived** **!!** ***Click Here*** *for Instructions on how to Archive Opportunities and Move them back to the Sales Pipeline*	*You can move Opportunities **Back** to the **Sales Pipeline** or **Delete Opportunities.*** ***In Addition,** you can **Bulk Move** or **Bulk Delete***

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Date	Reviewer	Status	Activities
Mar 28/2023	Gildie	Done	☑ ~~Add Header and Footer.~~ ☑ ~~Insert Back to Table of Contents~~ ☑ ~~!! double and not in italics~~ ☑ ~~*For **Optimal Performance**, please follow our Asset Preparation Guidelines when preparing your assets.*~~ ☑ ~~Three-dot instead of three-dot~~ ☑ ~~Make sure to say List instead of Menu: Highlight List, Amenity List, etc~~ ☑ ~~Change intro for Introduction~~ ☑ ~~Add get started as a title for Launch~~ ☑ ~~Turn Info headlines to gray~~ ☑ ~~Check table of contents links~~ ☑ ~~Check relevance with App.~~ ☑ ~~Check spelling~~ ☑ ~~Check continuity of numbers~~ ☑ ~~Update Last Edited~~ ☑ ~~Check High-Rise vs Highrise~~ ☑ ~~Change the Info titles to gray~~ ☑ ~~Internal Links~~
Apr 28/2023	Jay	Done	☑ Entered into Freshdesk
May 29, 2023	Gildie	Done	☑ Adjusted the Table of Contents in page 3. Link to comment: https://docs.google.com/document/d/1L3jnZXoSpag_O42p_u3DH4MCjelyzVFYaap2EqMrNLQ/edit?disco=AAAAxso1fcA We don't need Jay to adjust given that the table of Contents is auto-generated in Freshdesk.
Jul 28, 2023	Gildie	Done	☑ ~~Added the logo paragraph to the Add a Signature to your Emails~~
Dec 11, 2023	Gildie	Done	☑ ~~Adjusted the name of the article and the intro page.~~ ☑ ~~Review the article and Make changes to reflect what was changed in CRM 1~~
	Nancy	Done	☑ ~~Ask Jay to adjust the text in the following section:~~ ☐ Add a Signature to your Emails

Last Edited Oct 24/2024

bildhive

Date	Reviewer	Status	Activities
			☐ Change the name and intro of the article ☐ Jay did not mark the previous tasks, so I do not know whether he entered them in FD **Get Started** ☐ Connect to your Email Account using the Integrations Tab ☐ Connecto to your Video Conferencing Account **Table of Contents** ☐ Change the name of the article
Dec 20, 2023	Jay Dadhaniya	Done	☑ ~~Entered updated article into the Freshdesk~~
Oct 24, 2024	Gildie Nazari	Done	Updated the heads-up for 365 integration.
Oct 25, 2024	Nancy Zeni	Done	☑ ~~**Get Started**~~ ☑ ~~Connect to your Video Conferencing Account~~
25 Oct 2024	Jay Dadhaniya	Done	☑ ~~**Updated latest changes into the freshdesk**~~