



## Alpha Tracker & FLS/Solvares VISITOUR



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## Introduction

This document explains how to work with the Alpha Tracker & FLS/Solvares VISITOUR integration to optimise diary appointments.

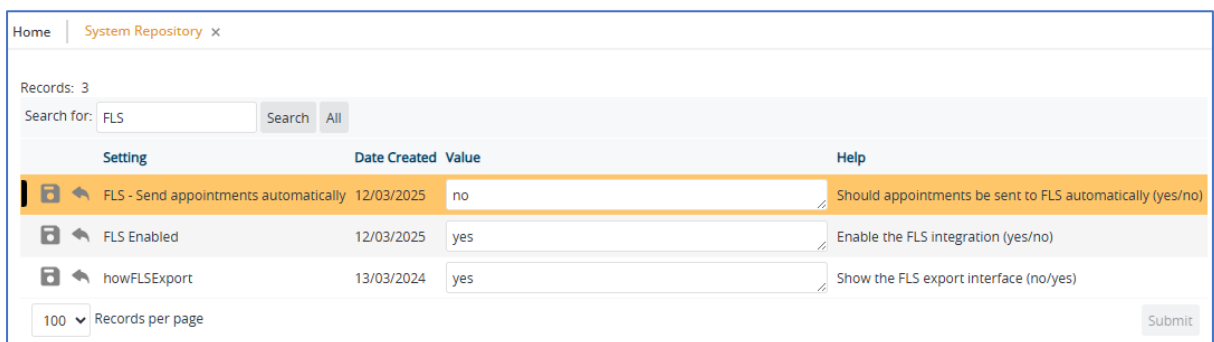
There are settings in the system to control how the process works and there are procedures to follow to ensure you are working in the best way for appointment optimisation.

There will be two methods for working with VISITOUR – sending appointments or sending projects/jobs. This manual describes the first approach whereby appointments are created in Alpha Tracker and optimised in VISITOUR.

## Setting up your system for appointment optimisation

For appointments to be sent from Alpha Tracker to VISITOUR for optimisation, three settings must be set in the System Repository. These are:

- **FLS – Send appointments automatically** – this should be set to “no”
- **FLS Enabled** – this should be set to “yes”
- **howFLSExport** – this should be set to “yes”.



Home | System Repository x

Records: 3

Search for: FLS Search All

Setting	Date Created	Value	Help
FLS - Send appointments automatically	12/03/2025	no	Should appointments be sent to FLS automatically (yes/no)
FLS Enabled	12/03/2025	yes	Enable the FLS integration (yes/no)
howFLSExport	13/03/2024	yes	Show the FLS export interface (no/yes)

100 Records per page Submit

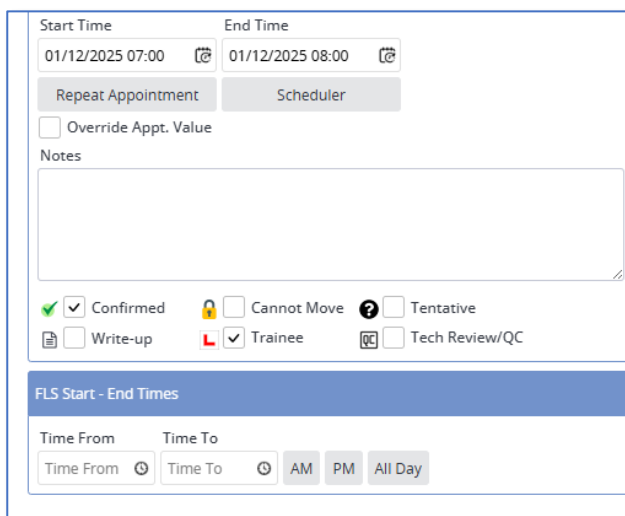
In addition, you can control which types of project/job are eligible for optimisation. For example, you would not want to optimise projects that are used for booking holiday or medical appointments; these should remain as fixed for the person and day/time. To do this, tick the **Optimise with FLS** flag on all Project Types that should be sent to VISITOUR on the Project Types screen.

Wallboard Colour	Risk Assessments	Key Service	Settings		Date Active	Date Inactive	Delete
purple			<input type="checkbox"/> Send Emails	<input type="checkbox"/> Send SMS	18/03/2024		<input type="checkbox"/>
			<input type="checkbox"/> Quote from Costs	<input type="checkbox"/> Optimise with FLS			
			<input type="checkbox"/> Send Emails	<input type="checkbox"/> Send SMS	18/03/2024		<input type="checkbox"/>
			<input type="checkbox"/> Quote from Costs	<input type="checkbox"/> Optimise with FLS			
aqua			<input type="checkbox"/> Send Emails	<input type="checkbox"/> Send SMS	18/03/2024		<input type="checkbox"/>
			<input type="checkbox"/> Quote from Costs	<input checked="" type="checkbox"/> Optimise with FLS			
blue			<input type="checkbox"/> Send Emails	<input type="checkbox"/> Send SMS	18/03/2024		<input type="checkbox"/>
			<input type="checkbox"/> Quote from Costs	<input checked="" type="checkbox"/> Optimise with FLS			
blue		0	<input type="checkbox"/> Send Emails	<input type="checkbox"/> Send SMS	18/03/2024		<input type="checkbox"/>
			<input type="checkbox"/> Quote from Costs	<input checked="" type="checkbox"/> Optimise with FLS			

## Sending appointments for optimisation

The process for sending appointments for optimisation is:

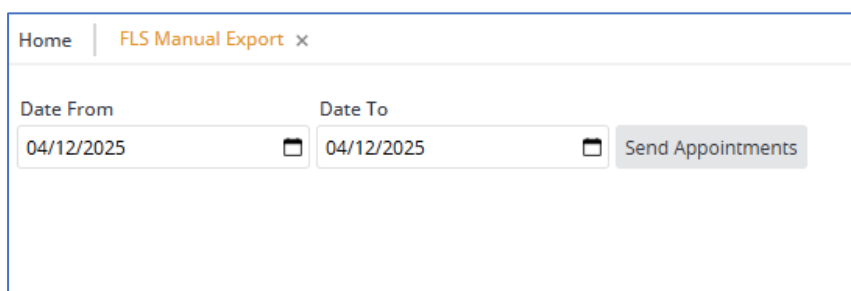
1. Add appointments into the Alpha Tracker diary for future dates. These can be individual appointments or linked appointments.
2. When making the appointments in Alpha Tracker, you can specify some parameters for VISITOUR. Specify these parameters on the Add/Edit Event screen where the details of the calendar appointment are specified, in a box labelled FLS Start-End Times.



The screenshot shows the 'Add/Edit Event' screen in Alpha Tracker. At the top, there are fields for 'Start Time' (01/12/2025 07:00) and 'End Time' (01/12/2025 08:00), each with a calendar icon. Below these are buttons for 'Repeat Appointment' and 'Scheduler'. A checkbox for 'Override Appt. Value' is present. A large text area for 'Notes' is below. At the bottom, there are several status checkboxes: 'Confirmed' (checked), 'Cannot Move' (locked icon), 'Tentative' (question mark icon), 'Write-up' (document icon), 'Trainee' (checked), and 'Tech Review/QC' (QC icon). The 'FLS Start - End Times' section is highlighted with a blue header. It contains 'Time From' and 'Time To' fields, each with a calendar icon, and three buttons: 'AM', 'PM', and 'All Day'.

Enter the earliest and latest times acceptable for the appointment, or click the **AM** button to restrict the scheduling to the morning, **PM** to restrict it to the afternoon, or **All Day** to allow the appointment to be scheduled at any time of the day. If left blank, all day is assumed.

3. When you are ready to hand a day's appointments over to VISITOUR for optimisation, select the date to send in FLS Manual Export and click **Send Appointments**. You would normally do this process only once for a day.



The screenshot shows the 'FLS Manual Export' screen. At the top, there are tabs for 'Home' and 'FLS Manual Export' (selected). Below the tabs, there are 'Date From' and 'Date To' fields, each with a calendar icon. The 'Date From' field is set to 04/12/2025 and the 'Date To' field is set to 04/12/2025. To the right of these fields is a button labeled 'Send Appointments'.

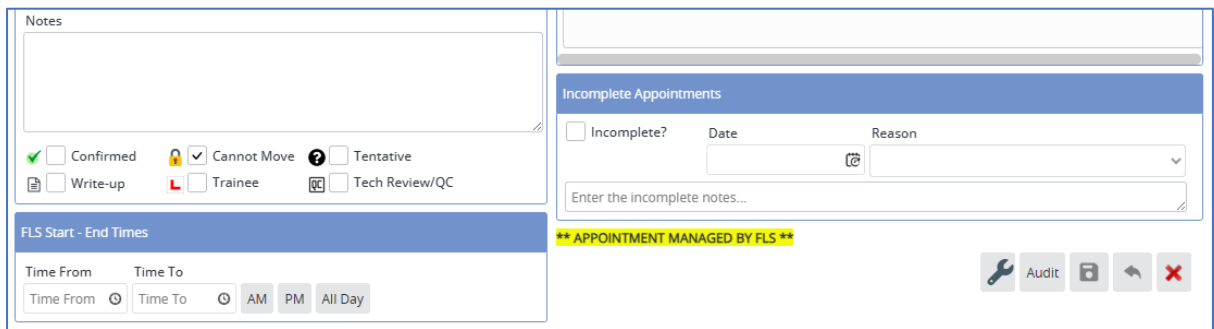
The appointments are sent to VISITOUR and optimised.

Optimisation may move the appointment within the day and may even move the appointment to a different member of staff. However, linked resources will never be amended in the optimisation process.

## Receiving optimised appointments

VISITOUR optimises the appointments for the day and automatically returns the optimised appointments to Alpha Tracker approximately five minutes later.

You can identify optimised appointments by the yellow highlighted flag displayed on the Add/Edit Event screen:



The screenshot shows the 'Add/Edit Event' screen. On the left, there is a 'Notes' section with a text area and a list of appointment status options: ☒ Confirmed, ☒ Cannot Move, ☐ Tentative, ☐ Write-up, ☐ Trainee, and ☐ Tech Review/QC. Below this is the 'FLS Start - End Times' section with 'Time From' and 'Time To' fields, and buttons for 'AM', 'PM', and 'All Day'. On the right, the 'Incomplete Appointments' section is visible, featuring a table with columns for 'Incomplete?', 'Date', and 'Reason'. Below the table is a text area for 'Enter the incomplete notes...'. A yellow highlighted flag with the text '\*\* APPOINTMENT MANAGED BY FLS \*\*' is displayed. At the bottom right, there are icons for 'Audit', a document, a refresh, and a close button.

If there are any appointments that VISITOUR cannot optimise within the specified day for any reason, these appointments are placed into an Escalation area in VISITOUR. They are returned to Alpha Tracker as appointments for a designated “escalation” member of staff.

***Once a day is optimised, do not move the appointments in Alpha Tracker.***

You can use the VISITOUR diary to view appointments, or Alpha Tracker’s. The diaries for an optimised day will be synchronised. You can make changes in the VISITOUR diary.

## Checking the optimisation reports

There are two Alpha Tracker reports to help you control your scheduling with VISITOUR. You should run these reports regularly to check and manage the scheduling process.

The two reports are located in the Superuser category:

- **FLS Appointment Status** – shows all appointments that have been sent

Report Parameters									
Date Sent to FLS From: 2025-12-03									
Date Sent to FLS To: 2025-12-05									
Show: 10 ▼ entries									
Job Number	Site Name	Staff Name	Start Time	End Time	FLS Scheduling Range	Successfully Sent To FLS	FLS ID	FLS Type	
C-258914	VOID 18 Warwick Court, Horsforth, Leeds, West Yorkshire	Mark Harrison	16/12/2025 10:39	16/12/2025 11:39		YES	13877	Call	
C-258915	VOID 2 Glenfield Close, Beechwood, Preston	Mark Pollard	16/12/2025 15:53	16/12/2025 16:53		YES	13878	Call	
I-245231	Solar Campus, Leasowe Road, Wallasey, Merseyside	Mark Evans	16/12/2025 09:00	16/12/2025 17:00		YES	13768	Break	

- **FLS Log** – shows the success/failure of each appointment being sent so users can manage any exceptions.

Report Parameters									
Log Date From: 2025-12-03									
Log Date To: 2025-12-03									
Show: 10 ▼ entries									
Date	Job Number	Site Name	Staff Name	Direction	Alpha Tracker Type	FLS ID	FLS Type	Info	
03/12/2025 04:25	U-00288	Wandsworth	Dan Watson	ToFLS	Appointment			Failed to post appointment into FLS for 102127 - Failed to map engineer for appointment 102127 - Failed to map staff to engineer: No engineer found for staff name: Dan Watson	
03/12/2025 04:25	U-247014	Annual leave	Tom Manley	ToFLS	Appointment			Failed to post appointment into FLS for 93537 - Failed to map engineer for appointment 93537 - Failed to map staff to engineer: No engineer found for staff name: Tom Manley	
03/12/2025 04:25	U-247014	Annual leave	Tom Manley	ToFLS	Appointment			Failed to post appointment into FLS for 90399 - Failed to map engineer for appointment 90399 - Failed to map staff to engineer: No engineer found for staff name: Tom Manley	

## Adding appointments to an optimised day

If required, you can add new appointments to an optimised day.

For example, if a surveyor's day is already optimised by VISITOUR, you can still schedule additional appointments for them in Alpha Tracker. However, you must be aware that any such new appointments will be immediately sent to VISITOUR and the surveyor's day may be optimised again (automatically).

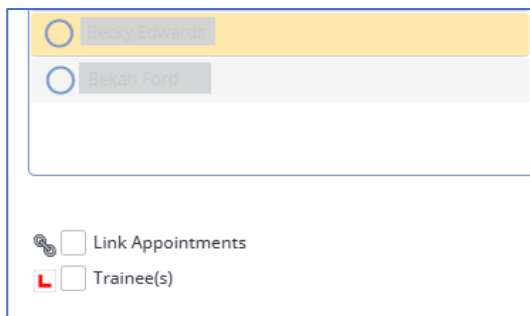
**Do not edit the new appointment in Alpha Tracker** – even for a minor change – as the appointment will have been sent to VISITOUR and you may find your changes have been overwritten when the appointment returns to Alpha Tracker approximately five minutes later.

Once the appointment has been optimised, you can edit it in VISITOUR.

## Adding additional people to an optimised appointment

You may want to add additional people to an optimised appointment, for example to schedule (unqualified) trainees or additional help. Do this by adding a linked appointment:

1. Open the original appointment (this is the optimised appointment in Alpha Tracker for the surveyor).
2. Click the Add other resource link on the Add/Edit Event screen. The Add Additional Resource screen is displayed.
3. Select the person/people who are to be added to the appointment, then tick the **Link Appointments** box and, if required, also the **Trainee(s)** box.



4. Click **Confirm** to create the linked appointments for the selected people.

These appointments are sent to VISITOUR and added as linked appointments. No optimisation takes place as these are linked to an appointment that has already been optimised.

## Re-optimising appointments

If changes need to be made to appointments on optimised days, you have two options:

- edit the appointments in VISITOUR – this is the preferred option
- change the times in the FLS Start-End Times section of the appointment in Alpha Tracker – this will cause the appointment to be re-submitted for optimisation.

## Adding appointments to days being managed by FLS

Alpha Tracker will automatically send new appointments to FLS *if* the member of staff already has appointments being managed by FLS on that day.

If appointments are added into Alpha Tracker for a member of staff *without* appointments in FLS for that day, the appointment will not go to FLS automatically. Instead, re-send the entire day's appointments using the "FLS Manual Export" dialog.



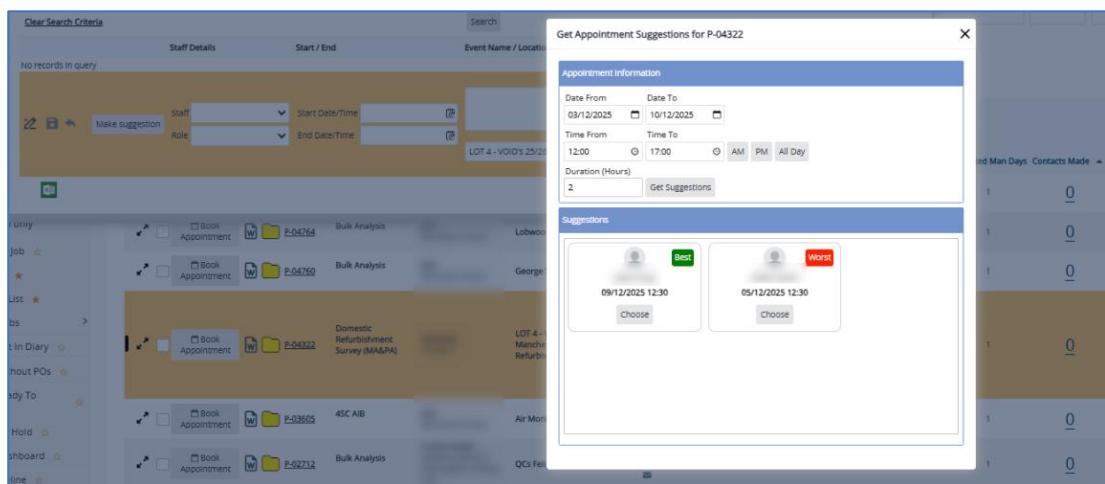
## Using the Make a Suggestion feature

When your Alpha Tracker is set to use VISITOUR for scheduling, any suggestions presented by the Make a Suggestion feature are handled by VISITOUR.

You can find the **Make a Suggestion** button on screens from which appointments are made. Given certain parameters, such as date, time, appointment length, the feature suggests people who are available for you to schedule. It even highlights the best possible match based on location, priority of job etc.

You could, for example, get suggestions like this:

1. Open the Projects Not In Diary screen and locate a project for which you want to book an appointment.
2. Click Book Appointment and then click **Make a Suggestion** instead of entering the appointment details.
3. Set the parameters and click **Get Suggestions**.



The available people are presented to you.

4. Select the (best) person. The appointment is populated with the details.