alpha tracker

Alpha Tracker & FLS/Solvares VISITOUR

User Guide

Version 1.0

start software

DOCUMENT CONTROL

Document

Alpha Tracker & FLS/Solvares VISITOUR User Guide

Current Version

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Previous Versions

Version	Date	Issued Pages	Reason For Issue
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1. INTRODUCTION & SETUP

1.1 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.

1.2 Setting up your system for appointment optimisation

For appointments to be sent from Alpha Tracker to VISITOUR for optimisation, some 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".

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:

1. 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			☐ Send Emails ☐ Send SMS ☐ Quote from Costs ☐ Optimise with FLS		18/03/2024		☐
			☐ Send Emails ☐ Send SMS ☐ Quote from Costs ☐ Optimise with FLS		18/03/2024		☐
aqua			☐ Send Emails ☐ Send SMS ☐ Quote from Costs ☑ Optimise with FLS		18/03/2024		☐
blue			☐ Send Emails ☐ Send SMS ☐ Quote from Costs ☑ Optimise with FLS		18/03/2024		☐
blue		0	☐ Send Emails ☐ Send SMS ☐ Quote from Costs ☑ Optimise with FLS		18/03/2024		☐

2.   OPTIMISING APPOINTMENTS

2.1   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.

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 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.*

2.2   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:

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.

3.   WORKING WITH OPTIMISED APPOINTMENTS

3.1   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

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

3.2   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.

3.3 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.

3.4 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.

☞ For information on deleting appointments, see Section 3.6, Deleting appointments.

3.5 Adding appointments to days being managed by VISITOUR

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

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

3.6 Deleting appointments

If you want to delete an appointment, delete it from Alpha Tracker not from VISITOUR.

Deleting an optimised appointment in Alpha Tracker deletes the appointment in both Alpha Tracker and VISITOUR. This happens almost immediately (within a few minutes due to the queuing of changes).

If you were to delete an appointment from VISITOUR, it would disappear from VISITOUR but would remain in Alpha Tracker. This is not recommended because:

- double-booking and confusion may result, as VISITOUR will re-optimise the remaining appointments to fill the perceived gap
- if you were to re-send the day's appointments to VISITOUR by using the FLS Manual Export screen, the appointment would be recreated in VISITOUR
- if you were to edit the times of the appointment in Alpha Tracker, in the FLS Start-End Times section, the appointment would be recreated in VISITOUR.

3.7 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**.
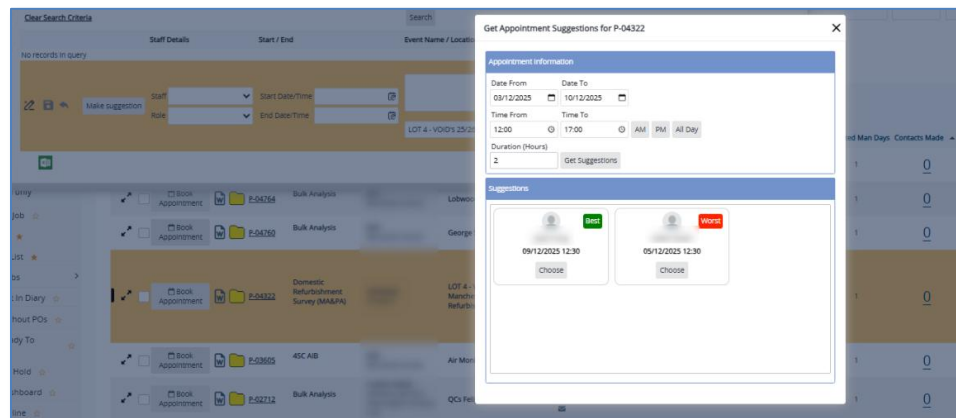
The available people are presented to you.

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