Step 1: Export Appointment Data from LeadPerfection

1. Access the Export Tool

- Open LeadPerfection.
- Navigate to: Security → Export.

2. Select or Input SQL Statement

- Choose one of the following options:
  - Saved Spec: Locate the pre-saved statement.
  - SQL STMT: Copy and paste the following SQL statement:

```
SELECT custnumber, apptdate, Zip, productid, dsp_id
FROM ProspectLeads
WHERE apptdate >= '2024-12-17'  -- 1. UPDATE  TO DESIRED APPOINTMENT DATE ('year-month-day')
 AND apptdate < '2024-12-18'   -- 2. UPDATE TO FOLLOWING DAY ('year-month-day')
 AND dsp_id <> 'CXL'
```

- This query selects customer information for appointments on December 17, 2024, excluding canceled appointments.

3. Update Dates in SQL Statement

- Update '2024-12-17' to the desired appointment date.
- Update '2024-12-18' to one day after the desired appointment date.

4. Download data

- Format: Excel Spreadsheet
- Column Titles: Yes

Step 2: Open Program: Input Appointments and Sales Reps Data

1. Open the Program (Appointment Assignment Workflow)
   - Input API Key
     - Enter the Google Cloud API Key in the popup.
     - *If you don't have an API Key, create one through Google Cloud Console*.

2. Upload Appointments Data
   - In the Appointments box, upload the Excel file containing the LeadPerfection appointment information.

3. Enter Sales Reps Data
   - In the 'Sales Reps' box: input text for reps available in Window 1.
   - Include each sales rep's name, home zipcode, and their scopes. Separate each sales rep's information with a space.
   - Format:
     - John, zipcode, scope1; scope2; scope3 Jane, zipcode, scope1; scope2...

4. Submit Input
   - After entering the appointments and sales reps, select 'Submit'.

Step 3: Run Program

1. Window Assignment

- The system will display a message that Time Window 1 has been successfully assigned.
- A list of current sales representatives for the time window will be displayed.
- A prompt will ask if you want to modify the sales representatives before assigning next window.

(*Time Window 1: First appointment to +2 hours; Window 2: +2 to +5 hours after first appointment; Window 3: +5 hours to the last appointment.*)

2. Modify Sales Reps Option

- If Yes: option to add or remove sales reps will appear
  - ADD:
    - Type 'add' and select 'OK'
    - Enter data for <u>one</u> sales rep and select 'OK'
    - To add more sales reps, modify again.
  - REMOVE:
    - Type 'remove' and select 'OK'
    - Enter sales rep(s) name(s) to remove, separated by comma
      - EX: John, Jane, Grace, Sally
- Select 'No' to assign next window.

3. Exporting Assignments

- After running workflow, assignments will export in an excel file
- A message will appear confirming the export: *"Results successfully exported."*
- The exported file will be named using the appointment date in the following format: appointments_results_YYYY-MM-DD.xlsx