


## ONLINE SCHEDULING VIA CALENDAR - 3 SUPER QUICK AND EASY STEPS

### (Partner Agent Option Only, NOT FOR CLIENT USE)

Taking advantage of the online scheduling tool available to partnering agents will save time and also instantly secure a date and time for your client for their scheduled pickup (appointment). This will also eliminate the need for either the approved referring agent or the client to call to schedule an appointment (and potentially be directed to voicemail when a team member is not available).

- Once the referral is submitted by the referring agent, it is reviewed by our team. Once approved the referral will be updated (and an email will be automatically sent to the referring agent) notifying them of the approval.
- Contained in the approval post and the email will be a direct option to schedule the client's appointment. If this option is not used, either the agent or client will be required to call Sharing Connections to schedule an appointment. We highly recommend using the online calendar option.
- When the option is selected to schedule using the online calendar, the following will be visible.



Enter the **Client's full name**, **phone number** (if available) and **email address**. *All appointment notifications will be sent to the supplied email address.* If the client does not have a current email address OR if you want the appointment info to be sent to you as the agent, enter your (agent's) email address so that you will be notified of appointment updates and reminders.

1

Choose Appointment

All Inclusive - Furniture & Bed/Crib  
\$100.00

This appointment allows the client to select furniture from our available inventory that has been approved via the referral and may also include up to a maximum of one adult mattress and two twin mattress/box sets or crib. All additional twin sets or cribs approved have an additional \$100 fee per item/set.

YOUR TIME ZONE  
(GMT-5:00) Central Time

PREVIOUS

IN 3 WEEKS

Thursday  
July 6

9:00am

2:00pm

Friday  
July 7

9:00am

11:00am

1:00pm

2:00pm

Saturday  
July 8

10:00am

11:00am

IN 4 WEEKS

Monday  
July 10

9:00am

1:00pm

2:00pm

Tuesday  
July 11

11:00am

1:00pm

2:00pm

MORE TIMES

Continue »

### STEP ONE:

- Choose Appointment is the first step in the process. Do this by reviewing the available dates and times available according to the type of referral submitted.
- In this example, we will select the 2:00pm pickup appointment time for Tuesday, July 11th.
- **A reminder that the online scheduling link should never be provided to the client. This is for approved agent use only.**

2
Your Information

<
EDIT APPOINTMENT INFORMATION

All Inclusive - Furniture & Bed/Crib  
July 11, 2023 at 2:00pm

Name \*

Jane
Doe

Phone

630-555-1212

Email \*

janedoe@fakeemail.com

Pickup Details

Please confirm the pickup details for this referral.

Who will be picking up the items? \*

Client

Who is paying the fee? \*

Client

Complete Appointment >

## STEP TWO:

- Enter **your client's information** in the *Your Information* section.
- This is the information that will appear on our appointment calendar, so be sure to use **your client's name** and not yours.
- While the phone number is not required (it's recommended), the email field is required. This email address will receive the confirmation and reminders. This should be the client's email address so that they can track their appointment. If the client does not have email, the agent's email address should be entered. *If you, as the agent, prefer to get the info/reminders, use your email address.*
- Complete the Pickup Details confirmation info and then select the Complete Appointment button.

3
Confirmation

All Inclusive - Furniture & Bed/Crib (\$100.00)  
**Tuesday, July 11, 2023**  
**2:00pm**  
5111 Chase Ave., Downers Grove, IL 60515  
[Reschedule](#)

Add to iCal/Outlook
Add to Google

Have further questions about the appointment date? Contact Sharing Connections at 630-971-0565. *All other inquiries regarding fees, transportation or approved items should be directed to the representative that placed the referral on your behalf.*

## STEP THREE:

- The next screen will display the confirmation of the appointment along with the option to add appointment to a calendar.
- The system will also automatically send a confirmation email to the email address that was supplied on the previous screen.
- The window can now be closed as the appointment is now scheduled.

Appointment Scheduled

for Jane Doe

What All Inclusive - Furniture & Bed/Crib (Sharing Connections Pickup Appointments)

When Tuesday, July 11, 2023 2:00pm (30 minutes)

Where 5111 Chase Ave., Downers Grove, IL 60515

Your appointment has been successfully scheduled.

Who will be picking up the items: Client

Who will be paying the fee: Client

Basic Access Fee: \$100.00\* (see additional fee notes below)

\*Basic Fee listed may or may not reflect additional \$100 for each twin mattress/box set or crib provided beyond the maximum two twin set or one crib limit per All-Inclusive, Bed Only or Crib Only referral. Final access fee will be provided via the reminder sent prior to the appointment.

## Email sent to client:

- The system will send the appointment confirmation direct to the client (using the email address you provided). If you, as the referring agent, prefer to be notified, just use your email address in Step Two of the appointment process.
- If at a later date the client needs to reschedule the appointment, the agent or the client can call with the changes and a new "Rescheduled Appointment" email will be sent with the updated information.
- In addition to the original email, the system will automatically send an appointment reminder to the client 24 hours before the appointment date/time.