



# SOFTPRO<sup>®</sup>

## APPOINTMENT SCHEDULER

### Organize and Link Appointments Across ProForm and Outlook

The SoftPro Appointment Scheduler allows you to maintain an organized schedule of all closing appointments through:

- Linkage of ProForm and Outlook schedules
- A variety of appointment scheduling organizational features



### View Master Schedule of Entire Closing Process

Ordinarily in ProForm, the only visible appointment details are the date and time of the closing. However, with the SoftPro Appointment Scheduler, you can create and view a master schedule of all appointments for each ProForm order (e.g. Seller's Signing, Buyer's Signing, Notary Services, etc.). With this feature, you will know which appointments are scheduled, when they are happening, who is involved, and where the appointments are taking place, giving you a global view of your entire closing calendar.

#### HOW IT WORKS:

When you schedule appointments using the SoftPro Appointment Scheduler, these appointments will automatically populate your Outlook calendar. The reverse is also true—you can schedule appointments directly in Outlook and have them sync to the corresponding ProForm order by including the ProForm order number in the Outlook subject line.

# FEATURES

#### ORGANIZATION:

With so many parties involved in the closing process, it's easy for your appointment calendar to become crowded. The SoftPro Appointment Scheduler organizes all parties involved in the closing into color-coded groups: buyer contacts are blue, seller contacts are green and all other contacts are orange. As shown in the screenshot to the right, parties from a ProForm order will display as available contacts to invite to appointments. These contacts are also labeled with their specific role in the closing process.

#### EXAMPLE:

Appointment in Clara's Office on 12/13/2011 at 4PM

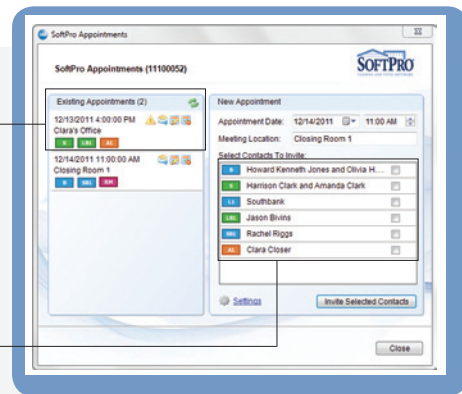
#### PARTIES:

##### Seller Parties

1. Sellers - Harrison and Amanda Clark
2. Listing Broker - Jason Bivins

##### Settlement Parties

1. Agent Contact - Clara Closer



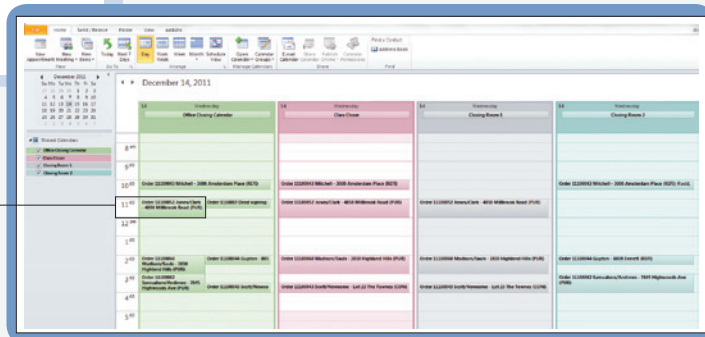
#### AUTOMATIC NOTIFICATIONS:

The SoftPro Appointment Scheduler will keep track of the number of responses to your appointment requests. You will also receive notifications if there are appointments scheduled, but requests have not been sent.

#### CONVENIENCE & FLEXIBILITY:



The subject line for appointments displays the order number, buyer's last name, seller's last name and the property address for convenient recognition of event details. You can also customize the appointment subject lines.



#### VISIBILITY:

View all shared Outlook office calendars (e.g. closing room calendars, closing officer calendars, or global office closing calendar).

PLEASE NOTE: To optimally utilize the SoftPro Appointment Scheduler, Outlook should be configured to share all office calendars you would like to sync with SoftPro 360.

