ENHANCE YOUR TIME MANAGEMENT WITH CIVIAPPOINTMENT FOR CIVICRM AND CIVIMOBILE

Civi Mobile

Agenda

- **Presentation of Agiliway**

- **CiviMobile** introduction

- **CiviAppointment** functionality overview

- **Q/A** session

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Agiliway

Key facts

8
Years on the market

150+
Successfully completed projects

5
Locations in US and Europe

37%
Average clients savings

50+
Long-term and regular active clients from US and Europe

220+
Team members and growing

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Agiliway

We provide such services as:

- Software development

- Mobile design and development

- IT outsourcing consulting

- Quality Management

- Web and Mobile Development

- Data analytics services

- CiviCRM implementation and development.

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Agiliway

Extensions for CiviCRM developed by Agiliway:

- **CiviCalendar -** provides a calendar page and dashlet for visualizing different types of cases, events, and activities.

- **Time Tracker -** helps users create projects, add tasks for them, assign performers and generate time spent reports.

- **CiviAppointment -** Allows users to create various types of meetings and book them for required contact

- **Civi24Host -** hosting platform that allows you to host your CiviCRM

- **CiviMobileAPI -** application, that allows users having access to their CiviCRM functionality on the go

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CiviMobile – who is it for?

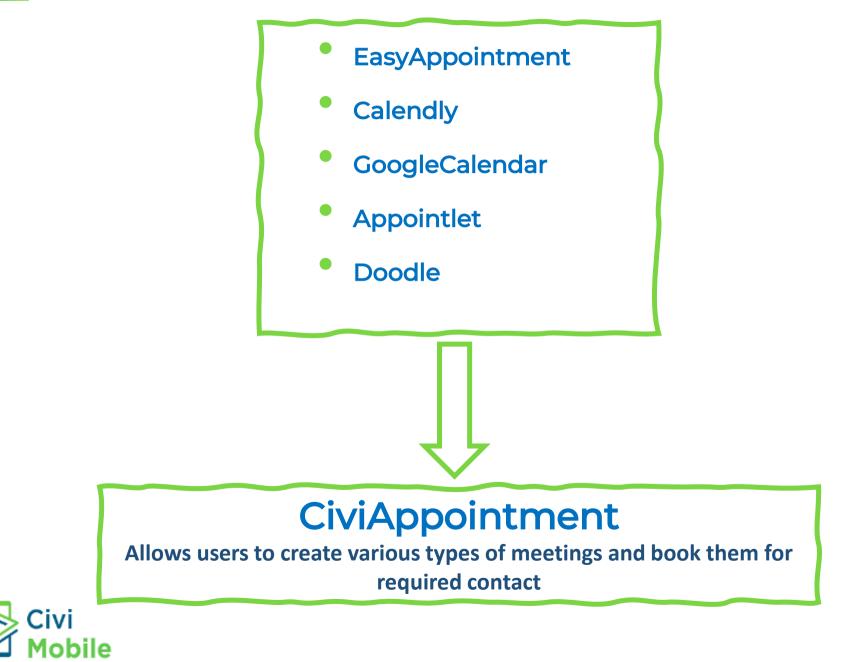## Manage contacts, activities, cases, and events on the go

KEY FEATURES

- **Mobile Access:** Constant access to CiviCRM data from mobile devices

- **Data Management:** View, enter, and edit information easily

- **User-Friendly:** Convenient and user-oriented interface

- **Efficient Organization:** Streamline internal processes and improve productivity

- **Real-Time Updates:** Stay updated with real-time data and notifications

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CiviAppointment: multiple services – one tool!

- EasyAppointment
- Calendly
- GoogleCalendar
- Appointlet
- Doodle

CiviAppointment
Allows users to create various types of meetings and book them for required contact

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CiviAppointment – what organizations is it for?

Non-Profit Organizations - To manage volunteer coordination, donor meetings, and community service events.

Educational Institutions - To arrange parent-teacher conferences, student counseling sessions, and administrative meetings.

Service Providers - Such as legal advisors, financial consultants, and real estate agents for client consultations and service appointments.

Healthcare Providers - For scheduling patient appointments, follow-ups, and consultations.

Community Centers - For scheduling classes, workshops, and community events.

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CiviAppointment features

- **Appointment Scheduling:** Create and manage various types of meetings

- **Custom Time Slots:** Set up and edit appointment slots for individuals

- **Appointment Monitoring:** Track and monitor upcoming appointments easily

- **User-Friendly:** Simple and intuitive interface for efficient use

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CiviAppointment - Permissions

Permission	anonymous user	authenticated user	test role	administrator	Project Coordinator	Field Worker	Program Manager	Director
CiviAppointment : access CiviAppointment Access - have access to CiviAppointment	☐	☐	☑	☑	☐	☐	☐	☐
CiviAppointment : book a slot It means the User can book a slot with other contact.	☐	☐	☑	☑	☐	☐	☐	☐
CiviAppointment : cancel appointment It means the User can cancel appointment.	☐	☐	☑	☑	☐	☐	☐	☐

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CiviAppointment Demonstration

CiviAppointment on CiviMobile demonstration

CiviAppointment foresights

Recurring Appointments and slots -Set up and manage recurring meetings

Reporting – Generate reports on appointment statistics and trends

Appointment History - Keep a record of past appointments for future reference

Customizable Booking Forms - allow users to create custom forms for different types of appointments

Automated Reminders - reminders to participants before appointments

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Thank you!

If you have any questions – feel free to ask!

Your Feedback is greatly valued!

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