ENHANCE YOUR TIME MANAGEMENT WITH CIVIAPPOINTMENT FOR CIVICRM AND CIVIMOBILE
Agenda

• **Presentation of Agiliway**
• **CiviMobile** introduction
• **CiviAppointment** functionality overview
• **Q/A** session
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

[QR Code]
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.
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.
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
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
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.
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
# CiviAppointment - Permissions

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<thead>
<tr>
<th>Permission</th>
<th>anonymous user</th>
<th>authenticated user</th>
<th>test role</th>
<th>administrator</th>
<th>Project Coordinator</th>
<th>Field Worker</th>
<th>Program Manager</th>
<th>Director</th>
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<td>CiviAppointment: access</td>
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CiviAppointment on CiviMobile demonstration

- **04 Jun**
  - **06/04/2024, 1:50 PM** - **06/04/2024, 2:50 PM**
  - Testing and QA structure performance

- **05 Jun**
  - **06/05/2024, 5:00 PM** - **06/05/2024, 6:20 PM**
  - Sales individual test drive

- **06 Jun**
  - **06/06/2024, 8:00 PM** - **06/06/2024, 8:30 PM**
  - Phone Consultation with Sales Manager

- **07 Jun**
  - **06/07/2024, 2:20 PM** - **06/07/2024, 3:10 PM**
  - Unveiling Strategies for Success

- **08 Jun**
  - **06/08/2024, 3:30 PM** - **06/08/2024, 4:10 PM**
  - Tailored Solutions for Your Business
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
Thank you!

If you have any questions – feel free to ask!

Your Feedback is greatly valued!