

Calendar Logging & Symbol Guide

How to log manual bookings, and what every marker on the calendar means

HOW TO LOG A MANUAL BOOKING

When you type a job into your calendar by hand (not an online booking), follow these rules so the automation can pick it up correctly:

1. Put the full address in the LOCATION field

Every inspector physically attending the job needs the address in THEIR OWN calendar entry's Location field — not just the lead inspector's. If a helper's entry has no address, their stop won't get tracked.

2. Buyer info goes in the notes

Name, phone number, and email for the buyer(s). Co-buyers are fine — no need for matching last names, just list both.

3. Known agent? Just her name is enough

For a repeat agent you've worked with before, put her name in the title (e.g. "Full meal Marie Boatsman") or notes (e.g. "agent: Marie Boatsman"). The system matches her to her existing contact automatically — no need to re-type her phone/email every time.

4. New agent? Include contact info

If it's someone the office hasn't worked with, include her phone and/or email in the notes so a new contact can be created for her.

5. Use a service keyword in the title

The title needs one of: full, meal, scope, or radon (or a combination, like "full meal" or "scope radon") so the system knows what kind of job this is.

WHAT THE SYMBOLS MEAN

The system writes a small marker onto your calendar title once it processes a job, so you can tell what happened just by glancing at the calendar — no need to open the CRM.

(none)

Not yet processed

The job hasn't been picked up by the automation yet.

*

Unconfirmed hold

A tentative/requested slot — not a confirmed booking, so it's skipped entirely.

%

Contract sent

A full home inspection contract has gone out to the buyer.

\$

Fully loaded, no contract needed

A sewer/radon-only job — all buyer info captured, no contract required for this service type.

?

Needs review

Something's missing (usually buyer phone or email) — needs a human to take a look.



Radon release sent

A radon job — the release document was emailed to the buyer's agent.



Radon release NOT sent

Radon was scheduled, but there's no email on file for the buyer's agent — needs manual follow-up.

WHAT IT LOOKS LIKE ON A REAL DAY

Example calendar day, showing several jobs at different stages:

% Full meal. Terry McClellan



\$ Justin scope only. Rybacki

? Full inspection - unclear buyer

* Tentative - Smith full inspection
(unconfirmed hold - skipped, not yet a real booking)

% Full meal Marc Hansen



Questions about a marker you're seeing that doesn't match this guide? Ask before assuming — the system flags anything uncertain with "?" rather than guessing, and a human should always be able to override it.