

Add Appointment

Last Modified on 11/21/2024 11:14 am PST

Pathway: Accounts > Search > Accounts

Add an appointment to a customer's account for future meetings, events and followups. An appointment can be added from the account's menu option, or by right clicking within the calendar.

The screenshot shows a web-based form titled "ADD APPOINTMENT". The form is organized into several sections:

- TYPE:** A dropdown menu.
- ASSIGNED TO:** A dropdown menu with the value "Aliena Somers - Admin-NS (Admin)".
- APPOINTMENT TIME:** A date field showing "01/31/2024 Wed", a time field showing "8:00 AM", and a duration field showing "15m".
- REPEAT:** A dropdown menu with the value "None".
- LOCATION:** A text input field with the value "Client's Site".
- TITLE:** A text input field.
- NOTE:** A large text area for notes.
- COMPLETION NOTE:** A text area for completion notes.
- COMPLETE?:** A checkbox that is currently unchecked.
- ATTENDEES:** A section with a blue header and a plus icon. Below it is a table with columns for "CONTACT NAME", "EMAIL", and "PHONE".
- SAVE:** A green button at the bottom of the form.

Permissions

The following permissions are required for adding, editing and deleting appointments:

Permission ID	Permission Name
5	View Account
6	View Site
9	Add Appointment
10	Edit Appointment For Self
11	Delete Appointment For Self
12	Edit Appointment For Others

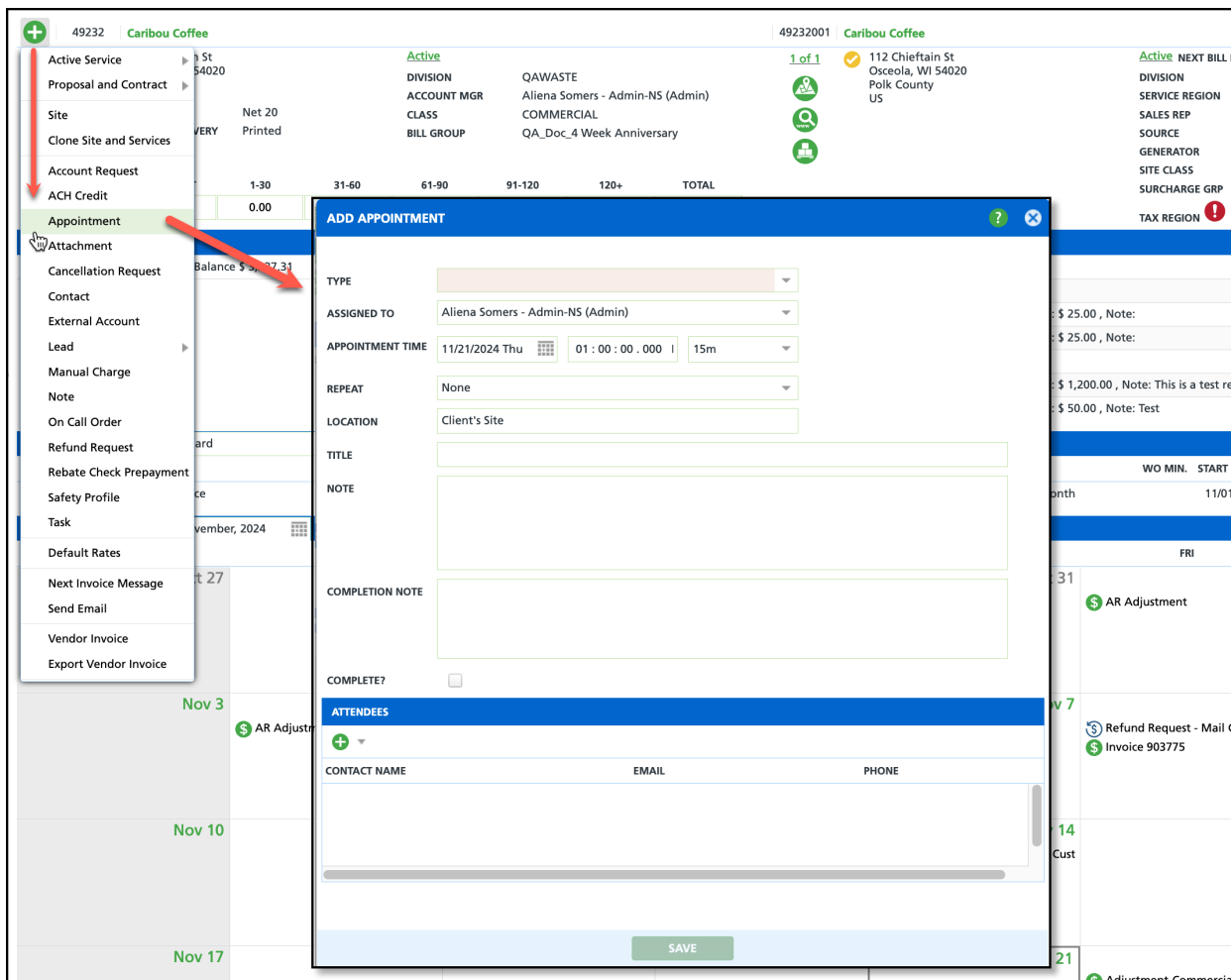
Field Descriptions

Field	Description
Type	Generalizes the what the appointment is about.
Assigned To	Option to assign the appointment to another user. By default, the user creating the appointment is assigned.
Appointment Time	The date and time the appointment starts.
Repeat	Option to set the appointment up on a recurring schedule. If this is a one-time appointment, leave 'None' selected.
Location	Indicates where the appointment will be taking place. If Other, consider adding additional information such as online meeting links in the Note box.
Title	Enter a title that will display on the Customer Service Calendar and the User Calendar/Appointments.
Note	Additional space to add internal notes regarding the appointment.
Completion Note	Option to add any completion notes after the appointment has ended.
Complete	Select the Complete check box only after the appointment is complete.
Attendees	Includes a list of account contacts who will be attending the appointment.

Add Appointment

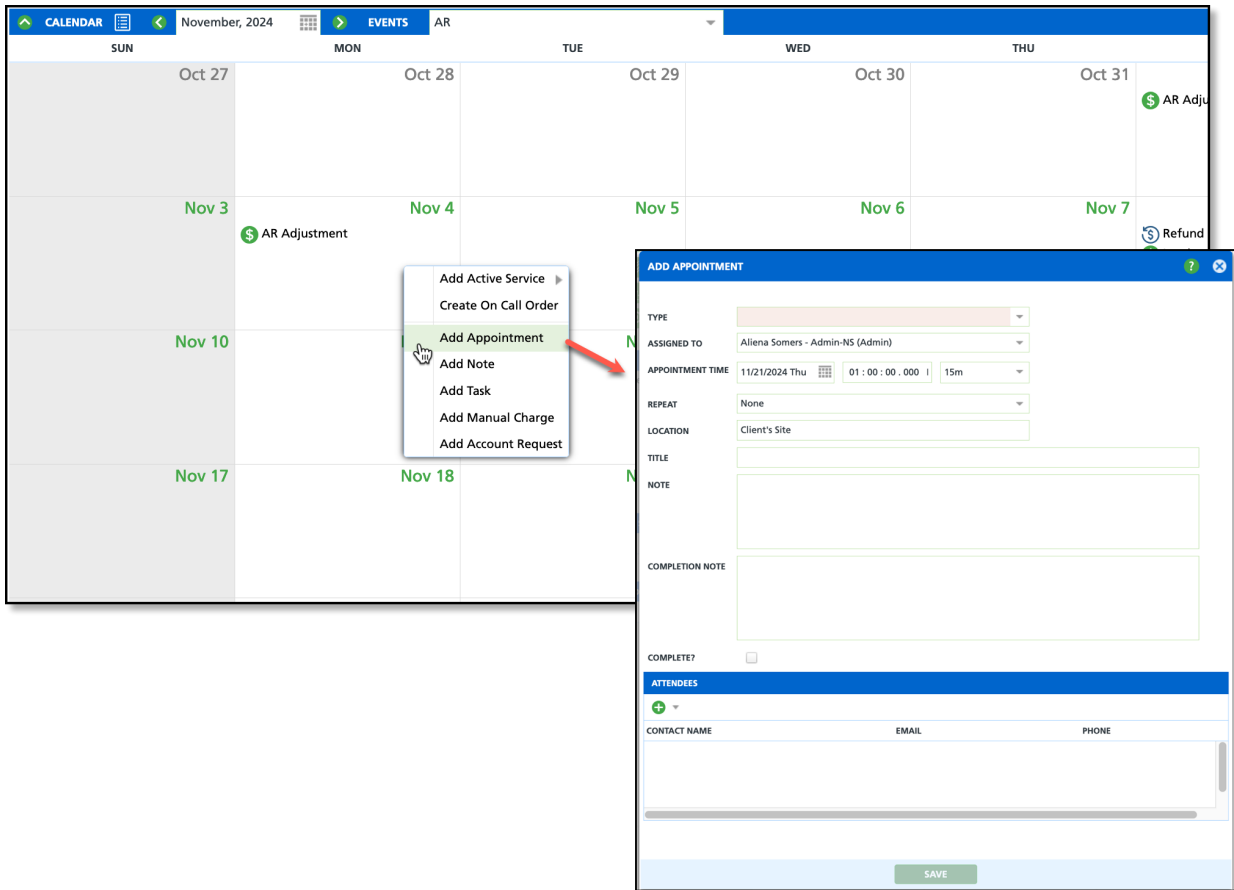
Appointments can be added from two locations, the Account Menu and the Account Calendar.

Account Menu



1. Click on the + **Menu** at the top left of the account screen.
2. Select '**Appointment**' from the list of options. This will open the Add Appointment popup editor.
3. Complete all necessary fields.
 - Do not enter a **Completion Note**, or select the **Complete** check box until after the appointment is complete.
4. Select and add **Attendees** to record who the appointment will include. Only contacts for the account/site display for selection.
5. Click **Save** when finished.

Calendar



1. Right-click on the **calendar date** the appointment applies.
2. Select '**Add Appointment**' from the popup that displays.
3. From the Add Appointment popup editor, complete all necessary fields.
 - Do not enter completion notes, or select the Complete check box until **AFTER** the appointment is complete.
4. If necessary, select and add **Attendees**. Only contacts for the account/site display for selection.
5. Select **Save** when finished.

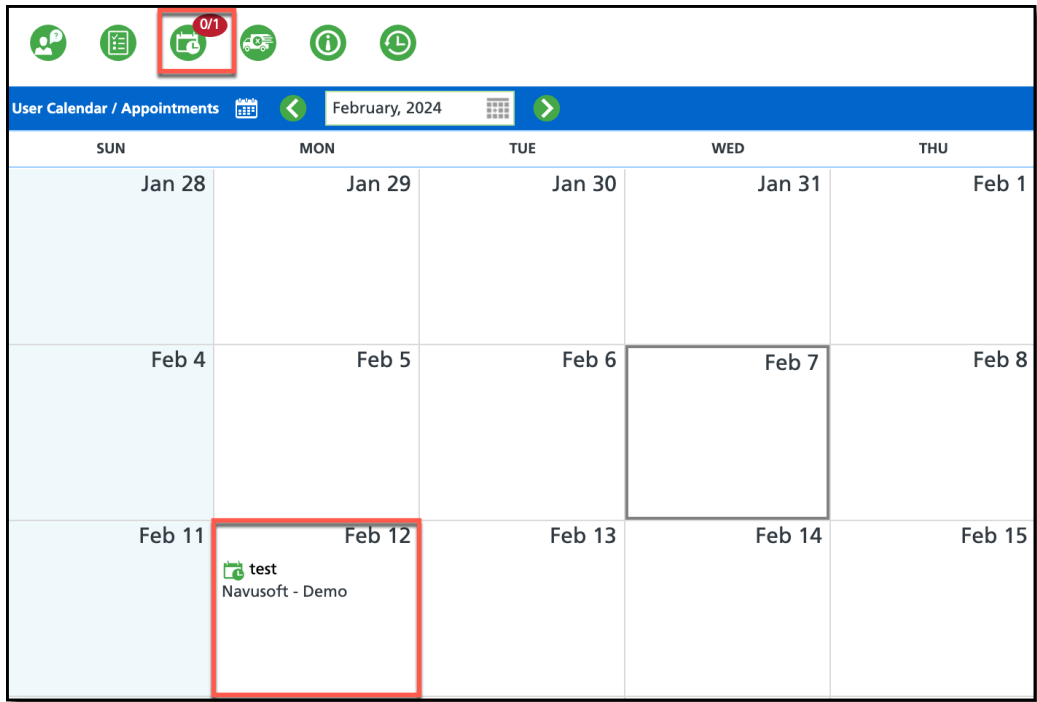
Screen Locations Appointments are Displayed

Appointments will display in the following locations until the appointment has been marked 'complete.'

Appointments Column of the Home Screen

CUSTOMER REQUESTS	TASKS	QUOTES/CONTRACTS	APPOINTMENTS
On Call / Extra pick request 19257 REED CAROLYN 19257001 REED CAR...	Jun 09 Billing/AR question VANHAM MARTIN		Aug 09 10:00 am Follow Up Osseo Clinic
Billing Error 45622 Starbucks 45622001 Starbucks	Jun 13 Follow Up INDUSTRIAL & MARINE SERVICE CO		
	Jun 24 Status Change Request PEARLAND LITTLE LEAGUE		
	Jun 24 Status Change Request THE O'KEEFE GROUP		

Notification Toolbar - Appointments



Pending Section of the Account

41898 Navusoft Premier Waste And Recycling 41898001 Navusoft - Demo

8100 Washington Ave Houston, TX 77007-1062 **Active** 1 of 2 Post Oak Blvd Houston, TX 77057 Harris County US +1 626-777-7777 **Active**

TERMS Net 20 DIVISION DAYTON ACCOUNT MGR House Acct non System SALES REP CORPUS SERVICE REGION CORPUS OPEN MARKET INVOICE DELIVERY PRINTED CLASS COMMERCIAL SALES REP House Acct non System SOURCE Cold Call GENERATOR Not Applicable TAX REGION CC CITY-NUECES COU-CC MTA-CC CRIME CON TAX EXEMPT No

CURRENT	1-30	31-60	61-90	91-120	120+	TOTAL
-51.00	135.92	0.00	0.00	649.95	222.00	956.87

Auto Pay Not Enabled

HIGHLIGHTS	PENDING
Account is significantly past due	1292 Follow Up Aliena Somers 01/12/2024 9:00 am
	1511 Customer Requ... House Acct no... 07/05/2023 11:06 am test
	1529 Customer Requ... House Acct no... 01/12/2024 7:16 am Customer Request from Portal.
	593... Adjustment-Co... Isabel Navarro 01/16/2024 Amount: \$ 0.00 , Note:
	593... Adjustment-Re... Isabel Navarro 01/18/2024 Amount: \$ 0.00 , Note: