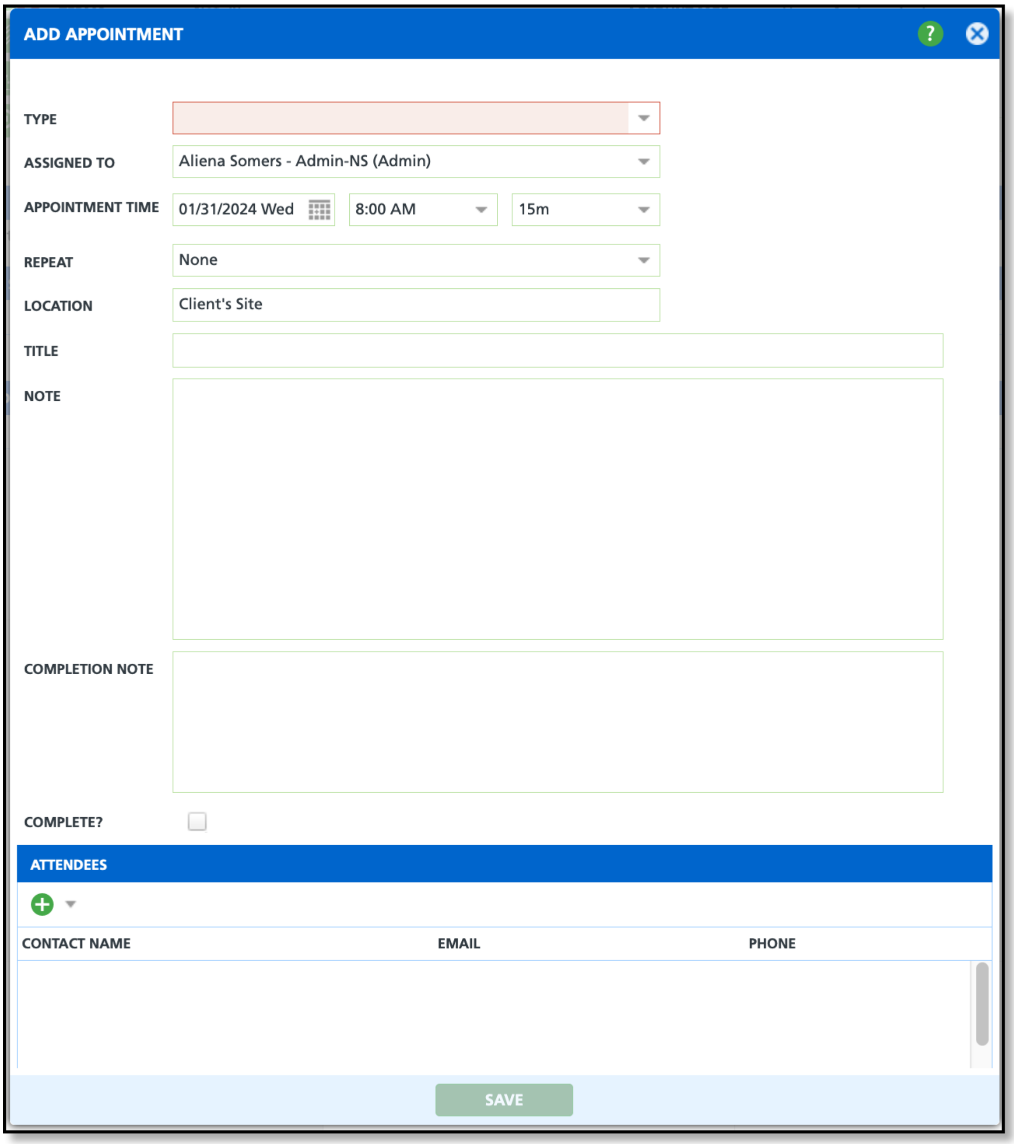
Add Appointment

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.



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

13	Delete Appointment For Others

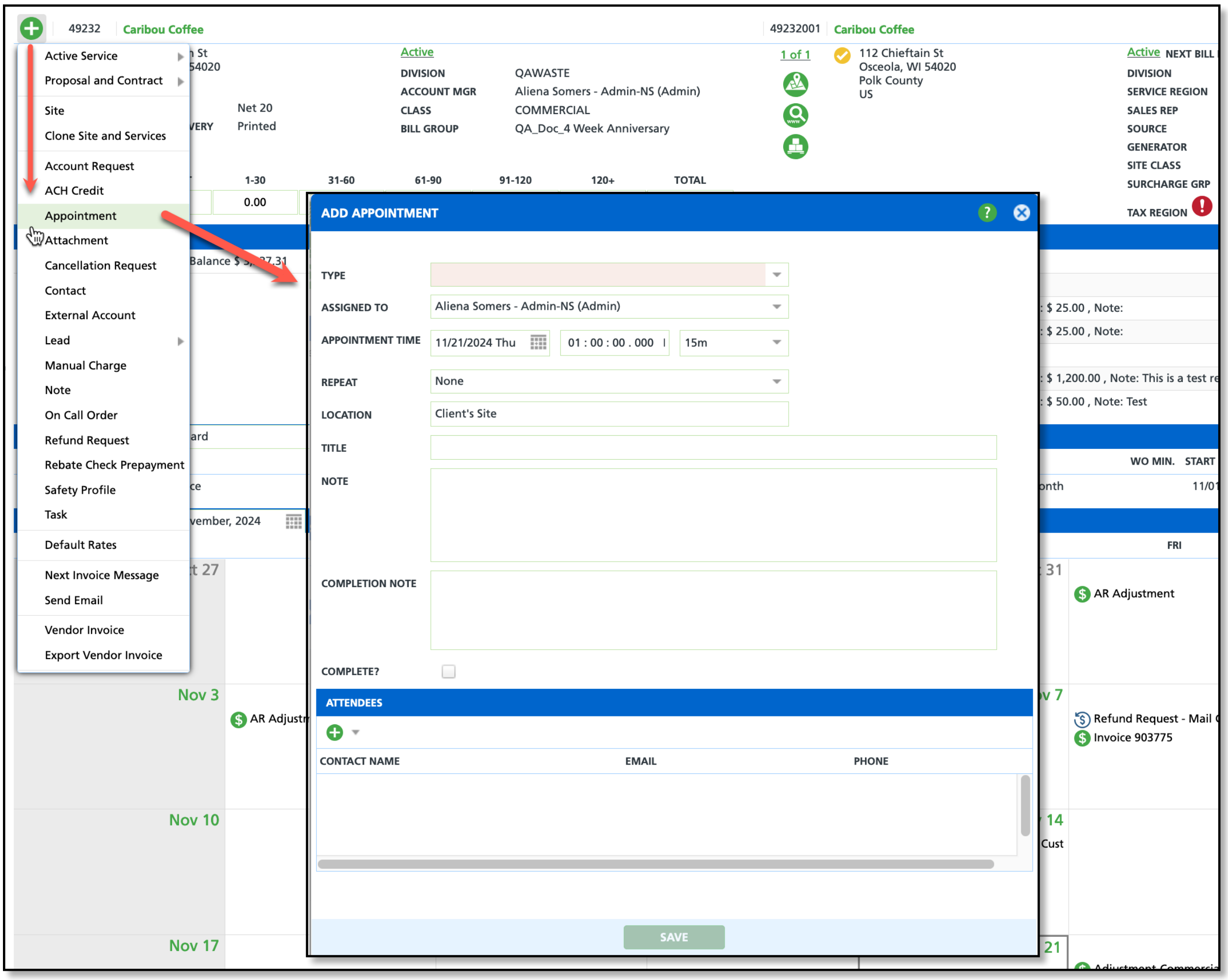
Field Descriptions

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

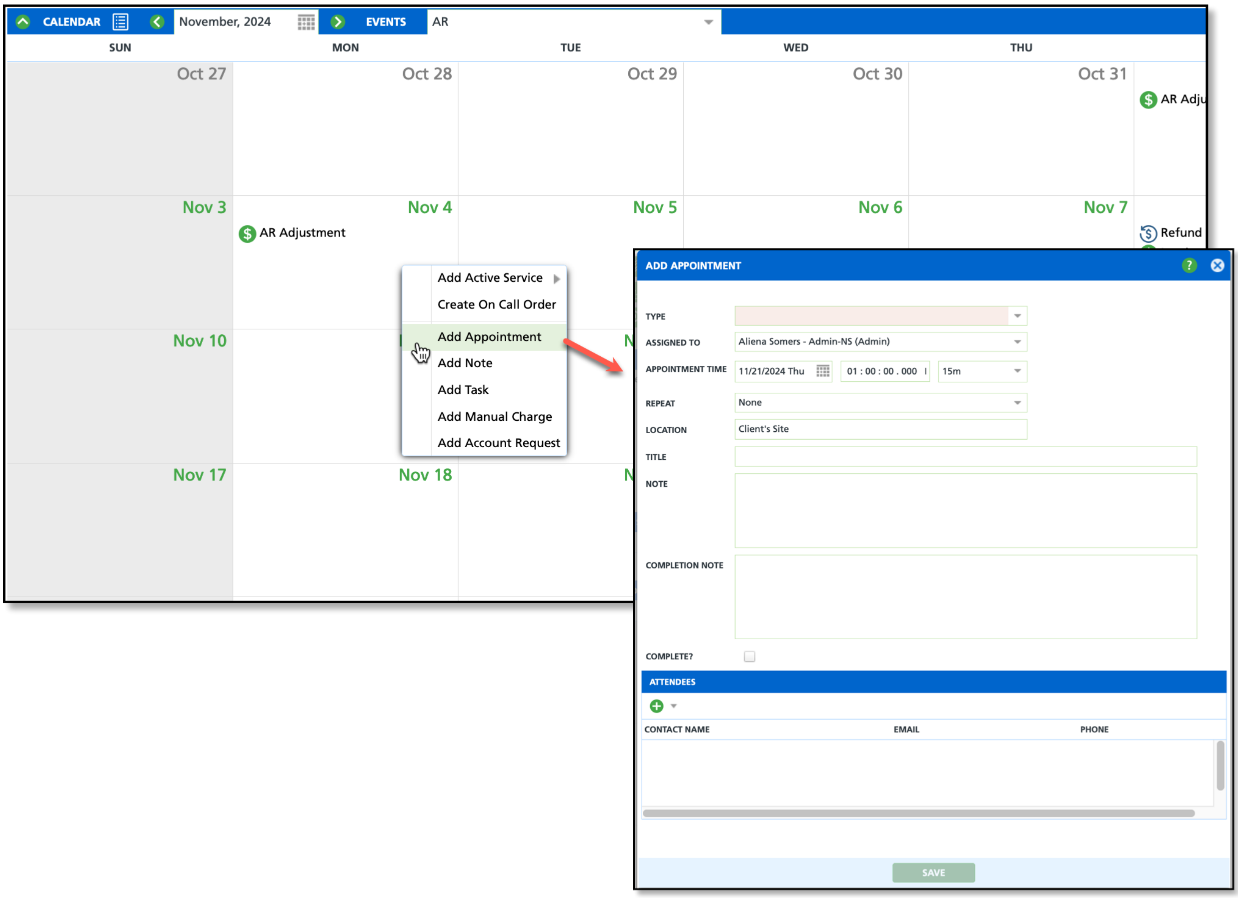
Appointments can be added from two locations, the Account Menu and the Account Calendar.

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

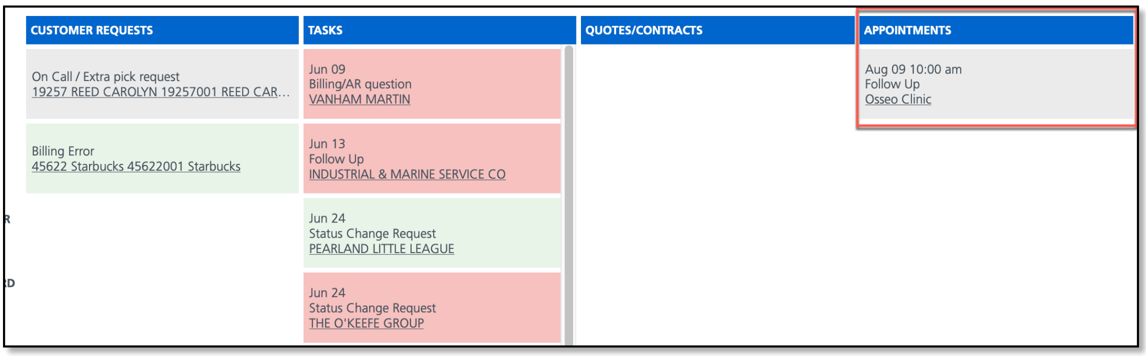


1. Right-click on the **calendar date** the appointment applies.
2. Select **'Add Appointment**' from the popup that displays.
3. From the Add Appointment popup editor, complete all necessary fields.
   - Do not enter completion notes, or select the Complete check box until AFTER the appointment is complete.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

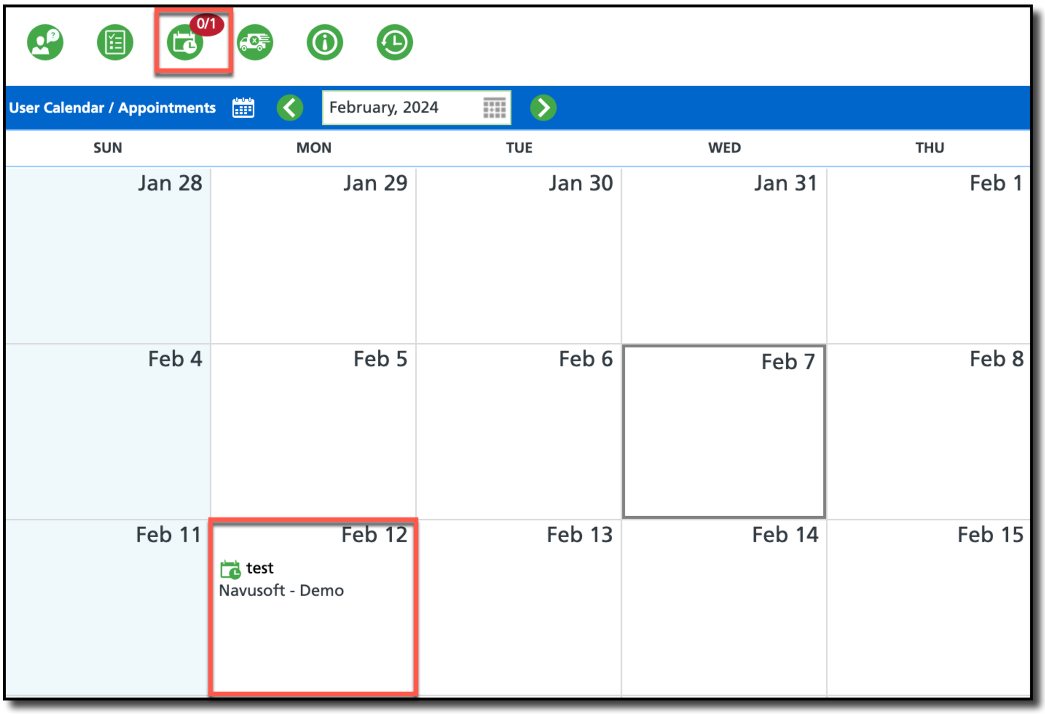
Screen Locations Appointments are Displayed

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

Appointments Column of the Home Screen



Notification Toolbar - Appointments



Pending Section of the Account