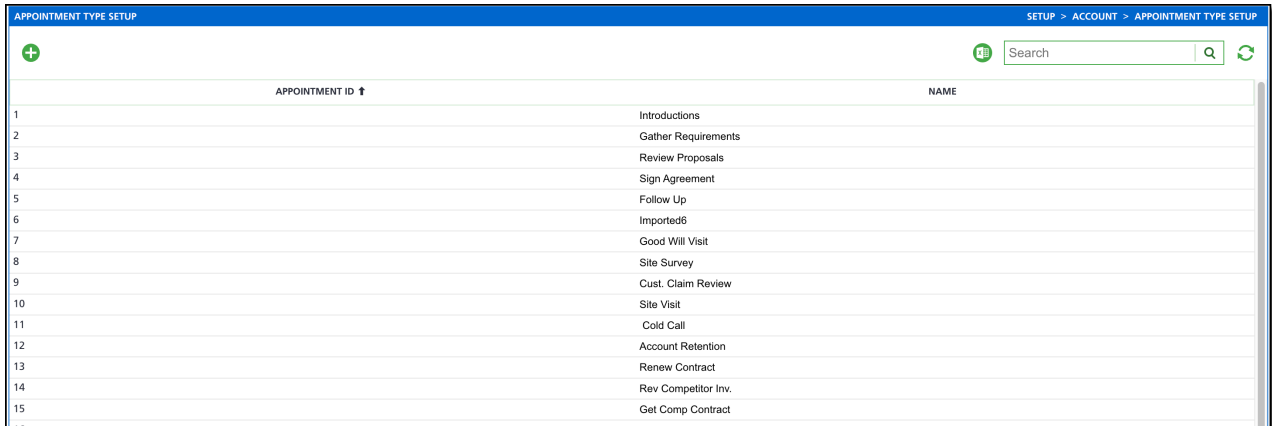


Appointment Type Setup

Last Modified on 04/15/2026 2:37 pm PDT

Pathway: [Setup](#) > [Account](#) > [Appointment Type](#)

Appointment Type Setup is used to create a list of appointment types a user can select from when [adding an appointment](#) for an account.



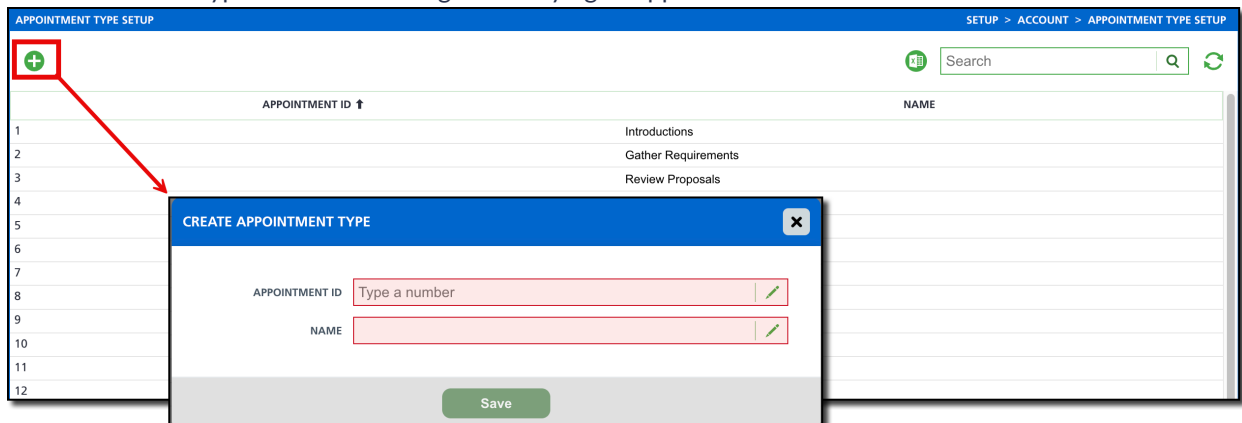
| APPOINTMENT ID ↑ | NAME |
|------------------|---------------------|
| 1 | Introductions |
| 2 | Gather Requirements |
| 3 | Review Proposals |
| 4 | Sign Agreement |
| 5 | Follow Up |
| 6 | ImportedS |
| 7 | Good Will Visit |
| 8 | Site Survey |
| 9 | Cust. Claim Review |
| 10 | Site Visit |
| 11 | Cold Call |
| 12 | Account Retention |
| 13 | Renew Contract |
| 14 | Rev Competitor Inv. |
| 15 | Get Comp Contract |

Field Descriptions

| Field | Description |
|----------------|---|
| Appointment ID | Required numeric ID for the Appointment Type |
| Name | A required text label that identifies the Appointment Type. This name appears in scheduling drop downs, on the calendar, and in reporting (e.g., "Initial Consultation"). |

Add/Edit an Appointment Type

To add or edit an Appointment Type, use the following steps. Once created, the Appointment Type will be selectable from the Type field when adding or modifying an appointment.



The screenshot shows the 'APPOINTMENT TYPE SETUP' page with a 'CREATE APPOINTMENT TYPE' dialog box open. A red box highlights the green plus icon in the top left corner, and a red arrow points from it to the dialog box. The dialog box has fields for 'APPOINTMENT ID' (with placeholder 'Type a number') and 'NAME', and a 'Save' button.

To Add

1. Click the **green +** icon to open the *Create Appointment Type* editor.
2. Enter the following required fields:
 - a. A unique **AppointmentID** number for the appointment type.

b. A descriptive **Name** for the appointment type.

Recommendation: Keep names brief yet descriptive to ensure they are easy to read in calendar view.

3. Click **Save** when finished.

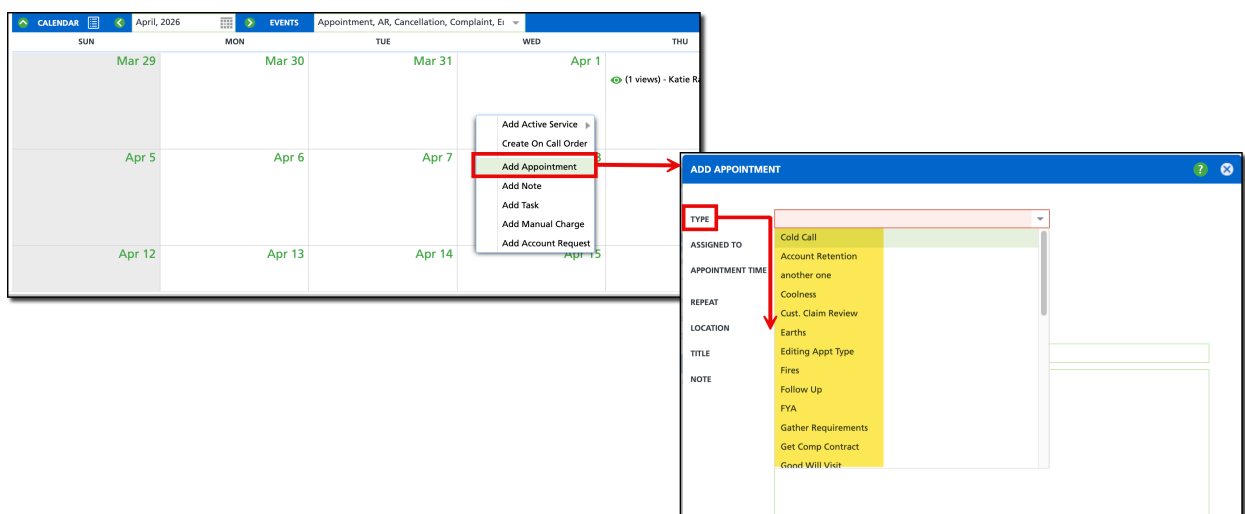
To Edit

Click on the data that needs to be modified from the Setup screen. Make the change and then click outside the field. The system will auto-save the changes.

Application of Appointment Type

The Appointment Type configurations that are set up here are visible to and used specifically when creating an appointment via the calendar.

Add Appointment



Permissions

The following permissions are required to view, add and edit the Appointment Type Setup screen:

| Permission ID | Permission Name |
|---------------|-----------------|
| 23 | Setup \ Account |

Related Articles

[Add Appointment](#)