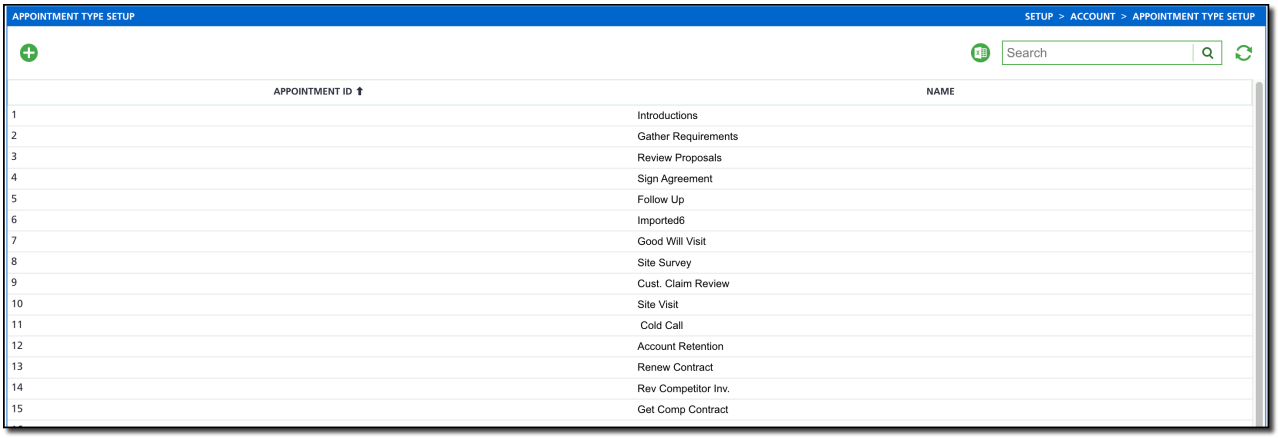
Appointment Type Setup

Last Modified on 10/09/2026 12:55 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.

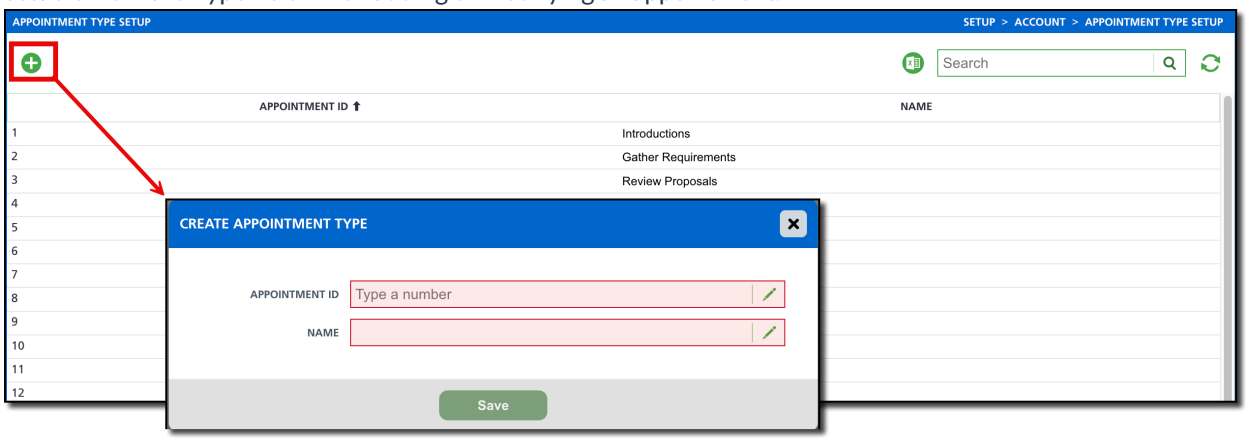


Field Descriptions

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.



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.

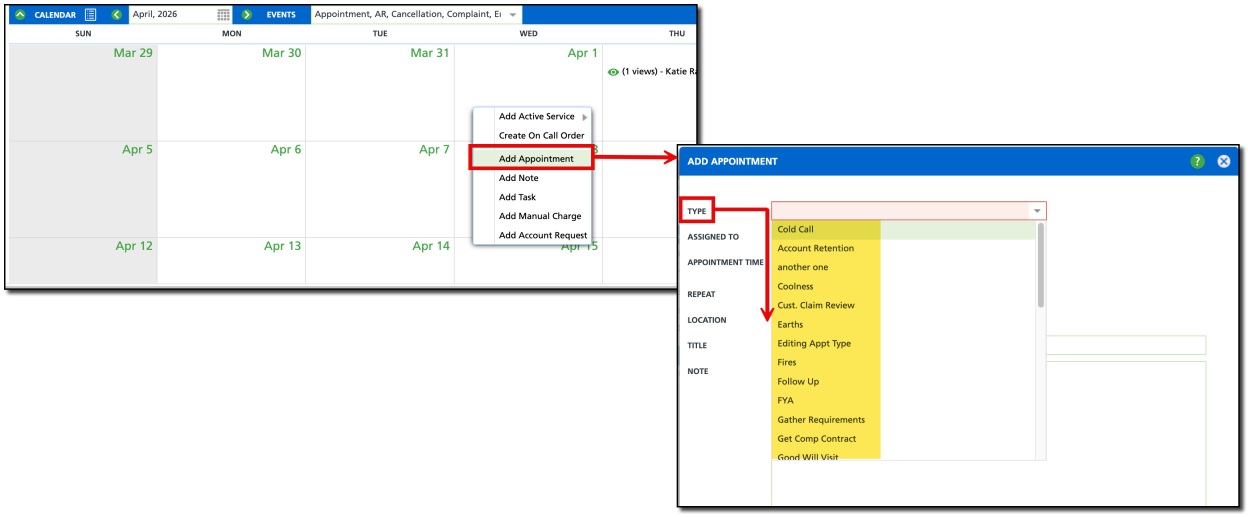
To Edit

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