

Appointment Type Setup

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

Appointment Type Setup is used to create a list of appointment types a user can select from when creating an appointment for an account.

The screenshot displays the 'APPOINTMENT TYPE SETUP' interface. It features a table with two columns: 'APPOINTMENT ID' and 'NAME'. The table contains 15 rows of appointment types. A modal window titled 'ADD APPOINTMENT TYPE' is open, showing two input fields: 'APPOINTMENT ID' and 'NAME', and a 'SAVE' button.

| APPOINTMENT ID | NAME |
|----------------|---------------------|
| 1 | Introduction |
| 2 | Gather Requirements |
| 3 | Review Proposal |
| 4 | Sign Agreement |
| 5 | Follow Up |
| 6 | Imported |
| 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 |

Permissions

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

| Permission ID | Permission Name |
|---------------|-----------------|
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Field Descriptions

| Field | Description |
|----------------|--|
| Appointment ID | ID used to identify the appointment. |
| Name | The name of the appointment that displays in the Type drop down field when the appointment is created. |

Add Appointment Type Setup

1. Click the **green +** to open the Add Appointment Type editor.

2. Complete the following required fields:
 - Enter the **ID** number for the appointment type.
 - Enter a **Name** for the appointment type.
 3. Click **Save** when finished.
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