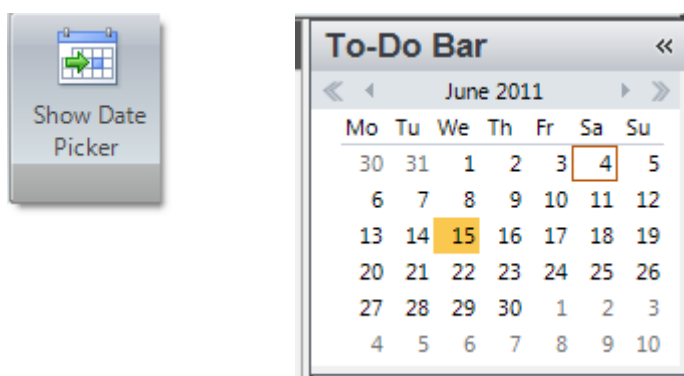


## How to Enter Appointments – Toolbox

Client Services will enter the first appointment into your diary, which allocates you to the Job. You are responsible for entering subsequent appointments.

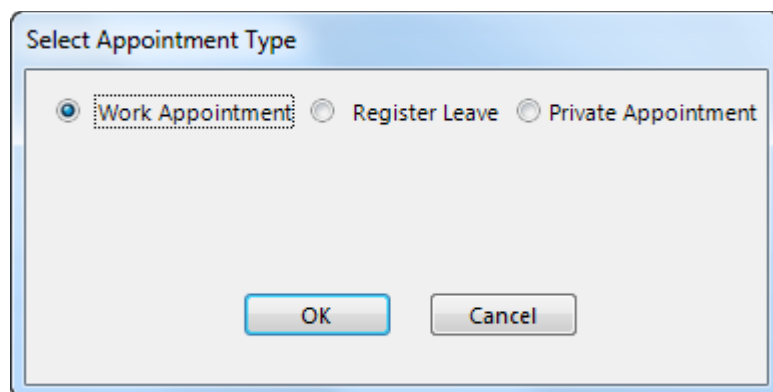
### Step one

First select the date you wish to make the appointment using either the To-Do bar or the main toolbar date picker:



### Step two

Double left click in the Appointment Time slot. We will make a work appointment, so click OK.

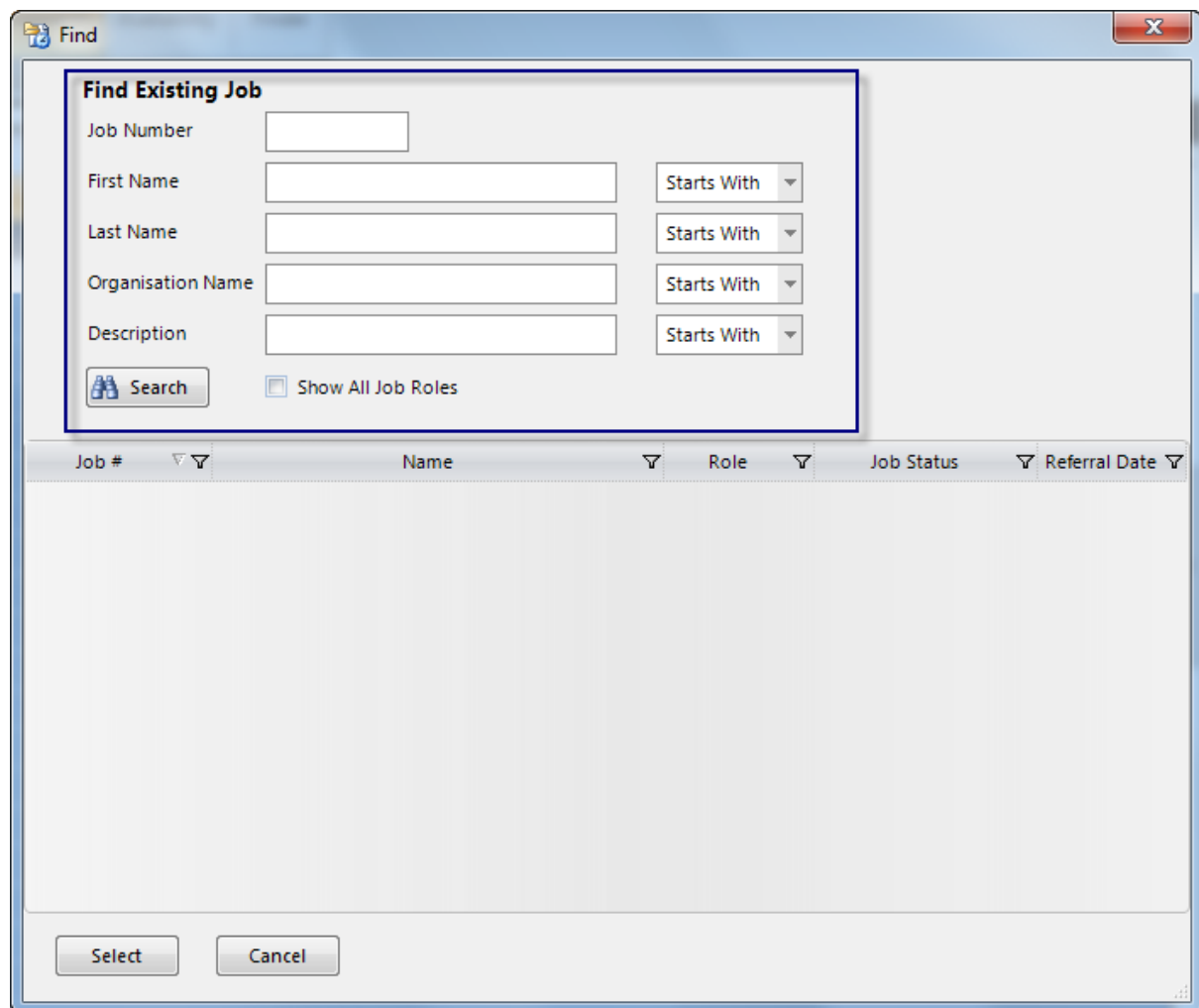


### Step three

We will search for a job number for an existing client to make a follow up appointment.

Key in the job number at the top and press the Enter Key or click the Search button.

A list will appear in the data grid, double click on the row with the job and the detailed appointment edit screen will open.

A screenshot of a software window titled "Find". Inside the window is a "Find Existing Job" dialog box. The dialog box contains several input fields: "Job Number", "First Name", "Last Name", "Organisation Name", and "Description". Each of the last four fields has a "Starts With" dropdown menu to its right. Below the input fields is a "Search" button with a magnifying glass icon and a checkbox labeled "Show All Job Roles". Below the dialog box is a data grid with columns: "Job #", "Name", "Role", "Job Status", and "Referral Date". At the bottom of the window are "Select" and "Cancel" buttons.

### Step four

The Edit Work Appointment Dialog box will appear.

Date and time can be adjusted on the right hand side in case you get it wrong in the schedule.

Also note that if you for example have a telephone appointment in another time zone you may need to select the client's time zone. If you don't select another state the client time will be the same as the time zone for your office diary.

The contract terms reminds you of the terms and conditions you will conduct this client's sessions under. This information is also available on the appointment screen on the Contract Terms tab for easy reference.

Once all details are correct, please click the "Save and Close" button.

Home  
H

Save & Close  
Close Window  
Actions

Appointment Job Detail Contract Terms History Messaging Status

Client

Name Howard Nessen

Primary Phone [ ] For Notify [ ]

Mobile 0404 109 482 For Notify [ ]

Email [ ] For Notify [ ]

Alternative Phone [ ] For Notify [ ]

Fax [ ]

Job Number 257029

Diary Date/Time

Thursday 13 Nov 2014

8:00 AM

9:00 AM (1 hour)

AUS Eastern Daylight Time

Activity Type Face to Face

Customer VIVA Energy

Service EAP Counselling

Invoice Reference [ ]

If Service Authorisation Required for Invoicing

Auth. Off. Name [ ]

Auth. Off. Phone [ ]

Location [ ]

Appointment Notes

Block Customer Invoicing [ ]

Block Professional Invoicing [ ]

Block Statistical Reporting [ ]

Created by Shae Meddings 30/10/2014 9:57:58 AM.  
Updated by Shae Meddings 30/10/2014 9:57:58 AM.

### Step five

The appointment will now appear in your diary.

