

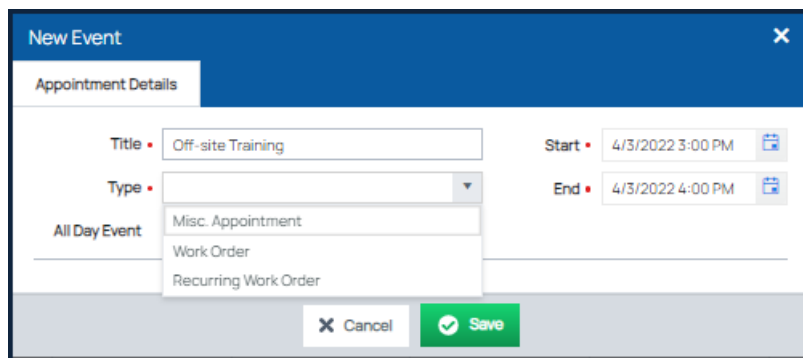
Add a Miscellaneous Appointment

Last Modified on 05/05/2022 2:26 pm EDT

Miscellaneous appointments may be used for blocking out time on the calendar when technicians and salespersons are not available. This appointment type may also be used to schedule appointments for salespersons and may be linked to a customer only, a customer and a specific site, or a customer, site and system.

From the Calendar, click on the Add Appointment at the upper right of the page. The New Event form will be displayed.

- **Title** - Enter a Title for the appointment
- **Type** - From the drop-down list, select Misc. Appointment
- **All Day Event** - If the appointment will last from 8:00am to 5:00pm, set this toggle button to Yes.
- **Start** - Enter the start date/time
- **End** - Enter the end date/time



The screenshot shows a 'New Event' dialog box with a blue header and a close button (X) in the top right. Below the header is a tab labeled 'Appointment Details'. The form contains several fields: 'Title' with the value 'Off-site Training', 'Start' with the value '4/3/2022 3:00 PM' and a calendar icon, 'Type' with a dropdown menu showing 'Misc. Appointment', 'Work Order', and 'Recurring Work Order', and 'End' with the value '4/3/2022 4:00 PM' and a calendar icon. There is also an 'All Day Event' toggle button. At the bottom of the form are two buttons: 'Cancel' with a close icon and 'Save' with a checkmark icon.

The New Event form will expand to enter additional information.

- **Repeat** - If the appointment will occur on a periodic basis, select the appropriate option button.
 - If an option other than Never is selected, the form will expand to make additional selections.

Appointment #5913 ✕

Appointment Details

Title • Start •

Type • End •

All Day Event NO Repeat

Repeat on

Every Week(s)

End Never After Occurrence(s) On

Miscellaneous

Customer Description 17/500

Site

System

Attendees

Sync NO

- **Description** – You may enter a description for the purpose of the appointment. Do not enter any personal information, as this will display on the calendar. Maximum of 500 characters allowed.
- **Attendees** – Click in the white box to select the employee for the appointment. If this appointment applies to multiple employees, check the box to the left of each person.
- **Sync** – If this button is set to Yes, if a change is made to the appointment, an email will be sent to the employee(s) selected in the Attendees field.

When finished, click the Save button at the bottom of the form.