Create a Miscellaneous Appointment

Last Modified on 01/11/2023 3:35 pm EST

From the Calendar Options Ribbon Group, click on the Miscellaneous Appointment radio button.

On the Calendar, click on the Date for the new Miscellaneous Appointment. Make certain that you have selected the Day view from the Arrangement Ribbon Group. Miscellaneous Appointments may not be created from the Week or Month view.

Within the Schedule Board double-click on the begin time within the column of the Technician to be scheduled for a Miscellaneous Appointment.

The Appointment form will be displayed. Enter information into the fields as described below.

- Type - Select the Appointment Type from the drop-down list. Several default appointment types are installed with the software – your company may add more choices to the list. Consult your company system administrator to add selections to the available list.
- Description - This field will auto-fill with the description associated with the Appointment Type; you may change this if desired.
- Notes - Notes are optional; you may enter up to 256 characters in this field. Any information entered into the Notes field will be viewable from the Schedule Board when hovering over the Miscellaneous Appointment. Be careful not to enter any sensitive or personal information.
- Day Range – Select the date range for the appointment. If the appointment is for one day or a portion of a day, the Day Range will be the same in both fields.
- Time Range – Enter the beginning and ending time for the appointment.
- Technicians – If more than one Technician is to be scheduled for the same date/time, check the box to the left of each Technician name to be included.

When finished click on the Save button to create the appointment(s).

Once the Miscellaneous Appointment(s) has been saved, it will appear on the Schedule Board.