Appointments Revamp

Overview

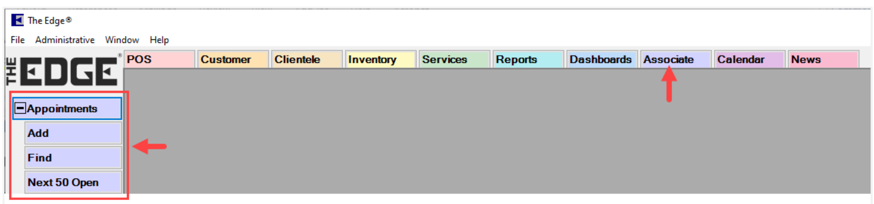
With the introduction of customer **Opportunities**, the **Appointments** feature has been redesigned to function only as an appointment tracker, much like you would find in Microsoft Outlook or other software.

Previously, **Appointments** behaved as a hybrid of an appointment and a sales opportunity.

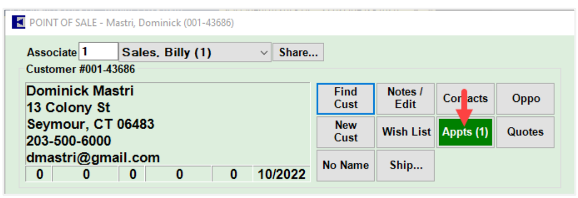
Working with Appointments

Appointments can be accessed from the following places:

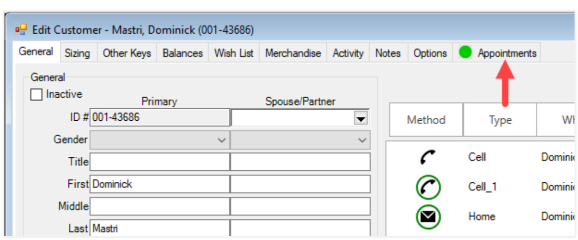
- **Associate Menu**



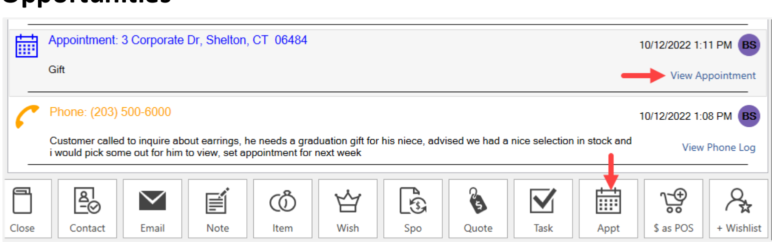
- **Point of Sale**



- **Customer Record**



- **Opportunities**

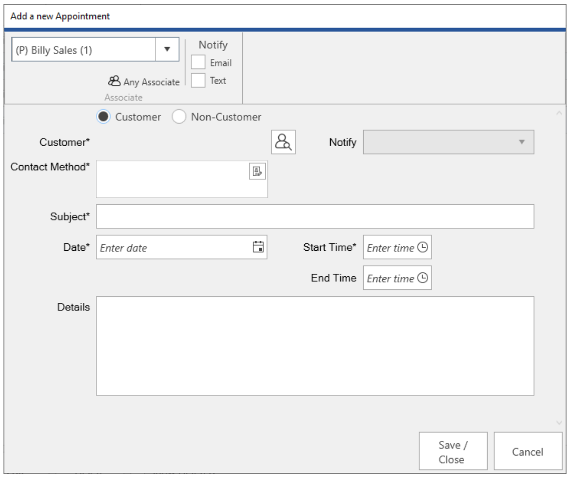


- **Calendar**

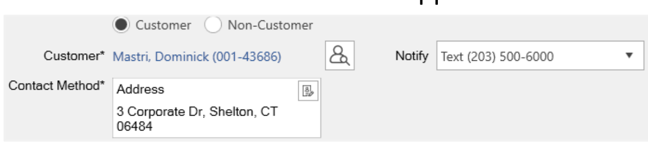
Adding an Appointment

To add an appointment:

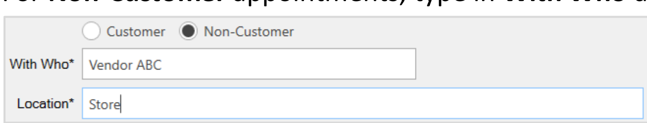
1. Click **Associates > Appointments > Add**. The **Add a new Appointment** window will appear.



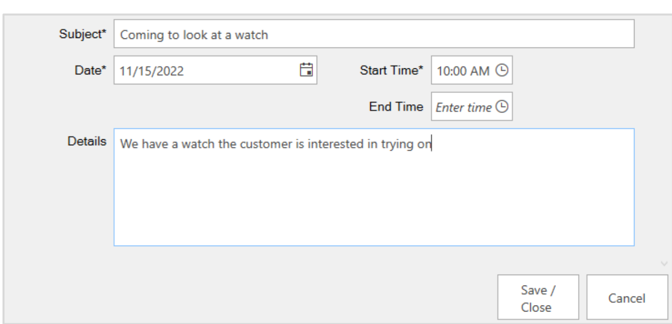
2. Use the drop-down in the top left to select one or more **Associates** or click **Any Associate** if this appointment can be viewed and fulfilled by any associate in the store.
3. Optionally, use the **Notify** checkboxes at the top if you want the associate to receive an **Email** or **Text** with the appointment details.
4. Select whether this appointment is for a **Customer** or **Non-Customer**.
   a. For **Customer** appointments, select the customer using the **Find Customer**  button, then specify a **Contact Method**. Optionally, use the **Notify** drop-down if you want the customer to receive an **Email** or **Text** with the appointment details.



   b. For **Non-Customer** appointments, type in **With Who** and **Location**.



5. Enter a **Subject**, choose the **Date** and **Start Time** (**End Time** is optional), then enter any additional information into the **Details** field.

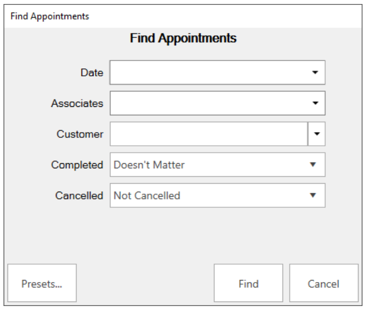


6. Click **Save / Close** to save the appointment.

Finding and Editing

To **Find** and **Edit** an appointment:

1. Click **Associates > Appointments > Find**. The **Find Appointments** window will appear.

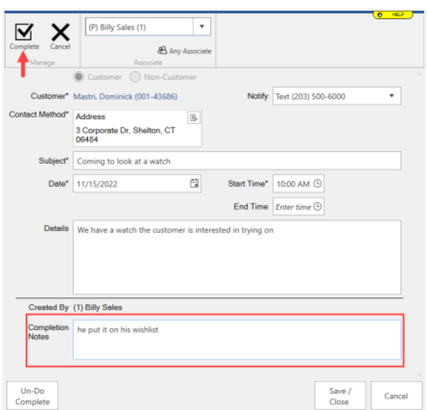


2. Enter desired criteria and click **Find**. A list of matching appointments will appear.
3. Select the appointment you wish to work with and click **Edit**. Alternatively, you can double click.
4. Make any desired changes, then click **Save/Close**.

Completing or Canceling

To complete an appointment:

1. **Edit** the appointment.
2. Enter **Completion Notes**, then click the **Complete** button in the top left.



NOTE Use the **Undo Complete** button in the lower left to open an appointment previously marked complete.

To cancel an appointment:

1. **Edit** the appointment.
2. Enter **Completion Notes**, then click **Cancel** in the top left.

NOTE Use the **Undo Complete** button in the lower left to open an appointment previously marked cancelled.