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Appointment Calendar User Guide

by Cybercom Software

Appointment Calendar User Guide

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Chapter

1

Introduction

Introduction

Welcome to Appointment Calendar!

So what exactly is Appointment Calendar?

It's an easy-to-use application for scheduling appointments. Appointment Calendar is an add-on for PhonePad 5. It is a multi-user network-based appointment scheduling application (that's a mouthful).

You can manage appointments for multiple users, or just one. Appointments can be booked with a minimum amount of clicks.


It integrates with the PhonePad 5 database and communicates via the PhonePad 5 Server, so there is no duplication of data. The contacts that appear in the Appointment Calendar are the same contacts that appear in PhonePad and its Address Book.

Features of Appointment Calendar include:

- Intuitive user interface makes it easy to use.
- Day, Week and Month calendar views.
- View appointment details by hovering mouse cursor over an appointment.
- Repeat (recurring) appointments.
- Easily find next appointment for any provider.
- Copy all details of an existing appointment to a new appointment.
- Various appointment types (Standard, Concurrent, Personal, Breaks, Leave, etc.)
- Configurable main toolbar.
- 12 or 24 hour time format.
- Dates adjust to your local settings.
- Printouts and reports.
- Complete history of all appointments.
- Plus more.

Like PhonePad, Appointment Calendar is an evolving product that will continue to be enhanced over time. We welcome any suggestions and feedback you may have.

We hope you enjoy using Appointment Calendar and find it a valuable tool for your business or organization.

 Appointment Calendar is not available as a separate application.

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Chapter

2

Installation

Installation

There is no need to install Appointment Calendar. When you install PhonePad (or update it) a trial version of Appointment Calendar is also installed.

Appointment Calendar is installed as a 60 day trial version. Although it is included with PhonePad, it is a separate purchase and has its own license.

Just like PhonePad, when you license Appointment Calendar it changes from a trial version to a fully licensed version.



The image shows a trial screen for Appointment Calendar. On the left is a cartoon character of a smartphone with a face, arms, and legs. To the right is the 'Appointment Calendar' logo, which consists of four colored squares (blue, green, red, yellow) followed by the text 'Appointment Calendar'. Below the logo is a message: 'Thank you for trying PhonePad 5 Appointment Calendar. You can try Appointment Calendar for 60 days free of charge.' This is followed by a paragraph: 'Once the trial period has expired, you will need to purchase Appointment Calendar to continue using it. There is no need to reinstall Appointment Calendar after purchasing a license.' Another paragraph says: 'We have been in business since 1995 and we are here to help any way we can.' The next paragraph says: 'For more information about Appointment Calendar or PhonePad, please contact us or visit our website.' Below this is contact information: 'Website: www.cybercom-software.com', 'Email: sales@cybercom-software.com, support@cybercom-software.com', and 'Telephone: 1-866-806-2144 (Toll Free in US and Canada), 1800-856-453 (Toll free in Australia), 1-917-781-3940 International'. At the bottom, it says 'You have 60 days left of your 60-day trial.' and there are four buttons: 'Continue Trial' (with a play icon), 'Buy Now' (with a credit card icon), 'License' (with a key icon), and 'Exit' (with a close icon).

Appointment Calendar

Thank you for trying PhonePad 5 Appointment Calendar. You can try Appointment Calendar for 60 days free of charge.

Once the trial period has expired, you will need to purchase Appointment Calendar to continue using it. There is no need to reinstall Appointment Calendar after purchasing a license.

We have been in business since 1995 and we are here to help any way we can.

For more information about Appointment Calendar or PhonePad, please contact us or visit our website.

Website: www.cybercom-software.com
Email: sales@cybercom-software.com
support@cybercom-software.com
Telephone: 1-866-806-2144 (Toll Free in US and Canada)
1800-856-453 (Toll free in Australia)
1-917-781-3940 International

You have 60 days left of your 60-day trial.

[Continue Trial](#) [Buy Now](#) [License](#) [Exit](#)

Chapter

3

Terminology Used

Terminology Used

You will see the word "Provider" mentioned through Appointment Calendar and the documentation. If you don't want to use this term you can change it via the **User Label** in [Admin Settings](#)¹²⁶.

This is a generic word for users providing some sort of service to clients. "Provider" seemed more appropriate than "User" in this situation.

Chapter

4

Getting Started

Getting Started

This section will guide you through getting started with the Appointment Calendar.

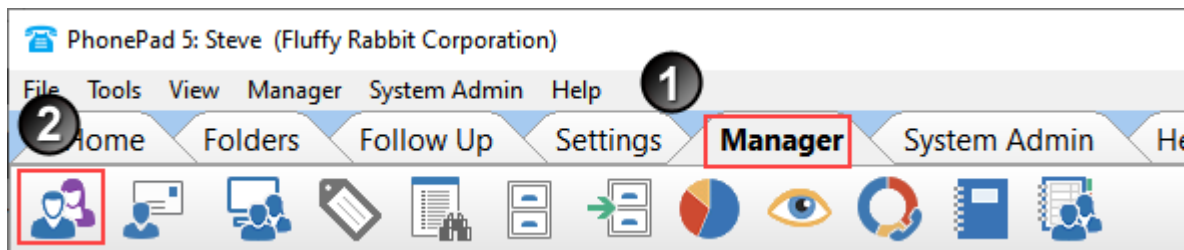
Setting Up Appointment Calendar

There are a few simple steps that need to be done before you can start using Appointment Calendar.

1 - Providing Calendar Access

Before users can start using Appointment Calendar, a PhonePad manager or administrator needs to give users access to the appropriate calendars of other users.

1. In PhonePad, select the **Manager** tab.
2. Click on the **Manage Users** button.

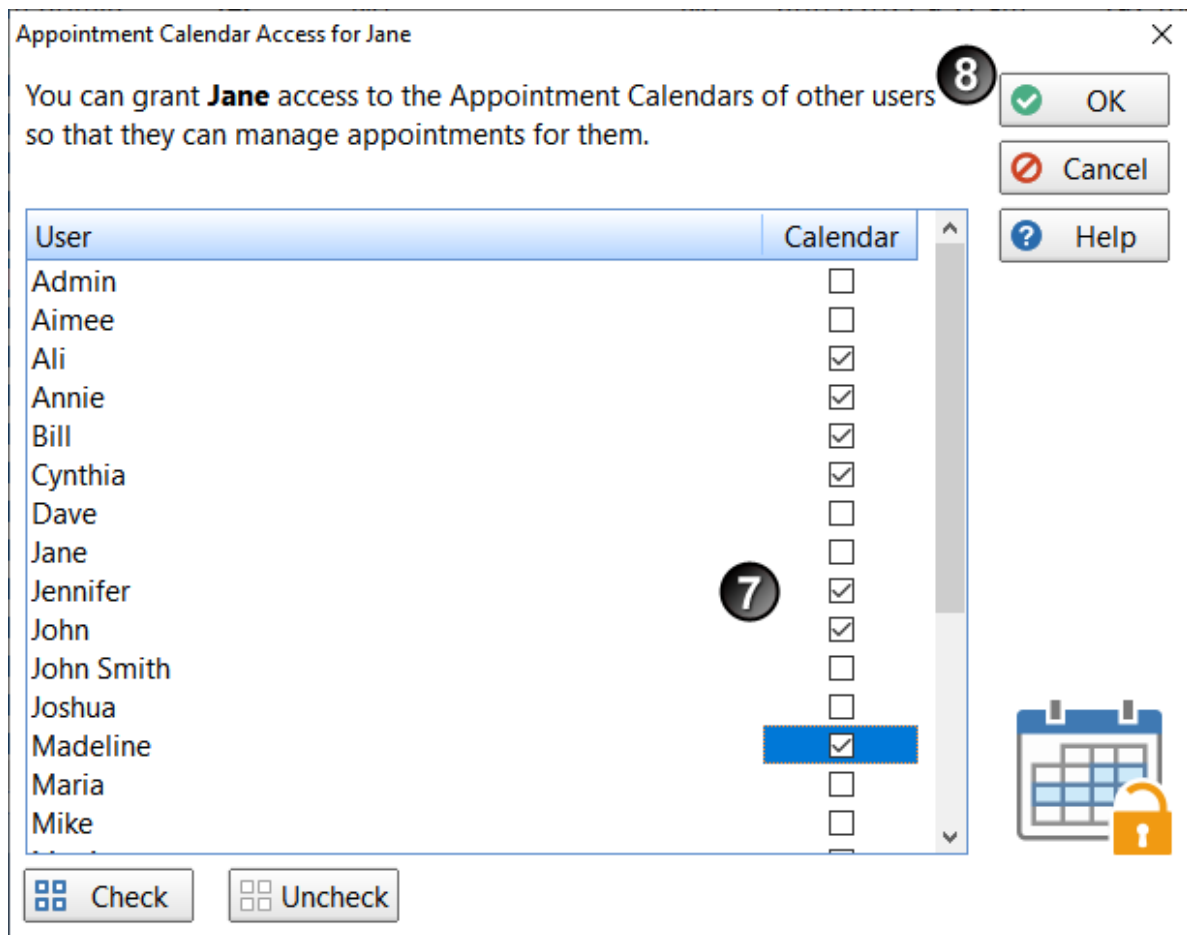


3. The **User Management** screen will appear.


Username	User Type	Enabled	Expires	Expiry Date	Hidden	Last Login	IP Address
Admin	System Admin	Yes	No		No	14/05/2021 9:31 am	192.168.0.238
Aimee	Manager	Yes	No		No	20/06/2018 9:40 pm	192.168.0.14
Ali	Standard User	Yes	No		No		
Annie	Standard User	Yes	No		No		
Bill	Standard User	Yes	No		No	23/04/2019 2:32 pm	192.168.0.12
Cynthia	Standard User	Yes	No		No	4/02/2019 1:48 pm	192.168.0.6
Dave	Standard User	Yes	No		No		
Jane	Standard User	Yes	No		No	29/01/2020 2:40 pm	192.168.0.33
Jennifer	Standard User	Yes	No		No	31/05/2018 4:25 pm	192.168.0.3
John	Standard User	Yes	No		No	7/12/2019 9:28 am	192.168.0.33
John Smith	Standard User	Yes	No		No	18/02/2020 2:23 pm	192.168.0.33
Joshua	Standard User	Yes	No		No		

The 'User Management' window includes a toolbar on the right with buttons for 'Add', 'Edit', 'Delete', 'Access', 'Address', 'Calendar', 'Auto', and 'SMS'. The 'Calendar' button is highlighted with a red box and a circled '5'. The 'Jane' row in the table is highlighted with a blue background and a circled '4'.

4. Select a user from the list.
5. Click the **Calendar** button.
6. This screen allows you to give the selected user access to other calendars.



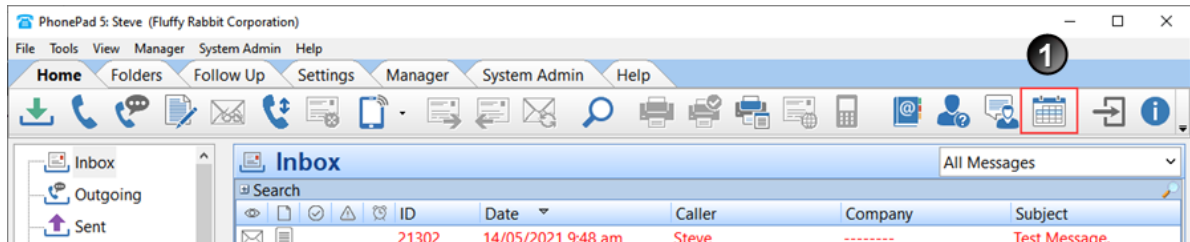
7. Access is given by setting each user's check box to checked (or uncheck it to remove access).
8. Click **OK** to save these settings.
9. Repeat steps 4 to 8 for each user that you want to give access to.

 The **Check** and **Uncheck** buttons provide a quick way to check or uncheck all of the user calendars.

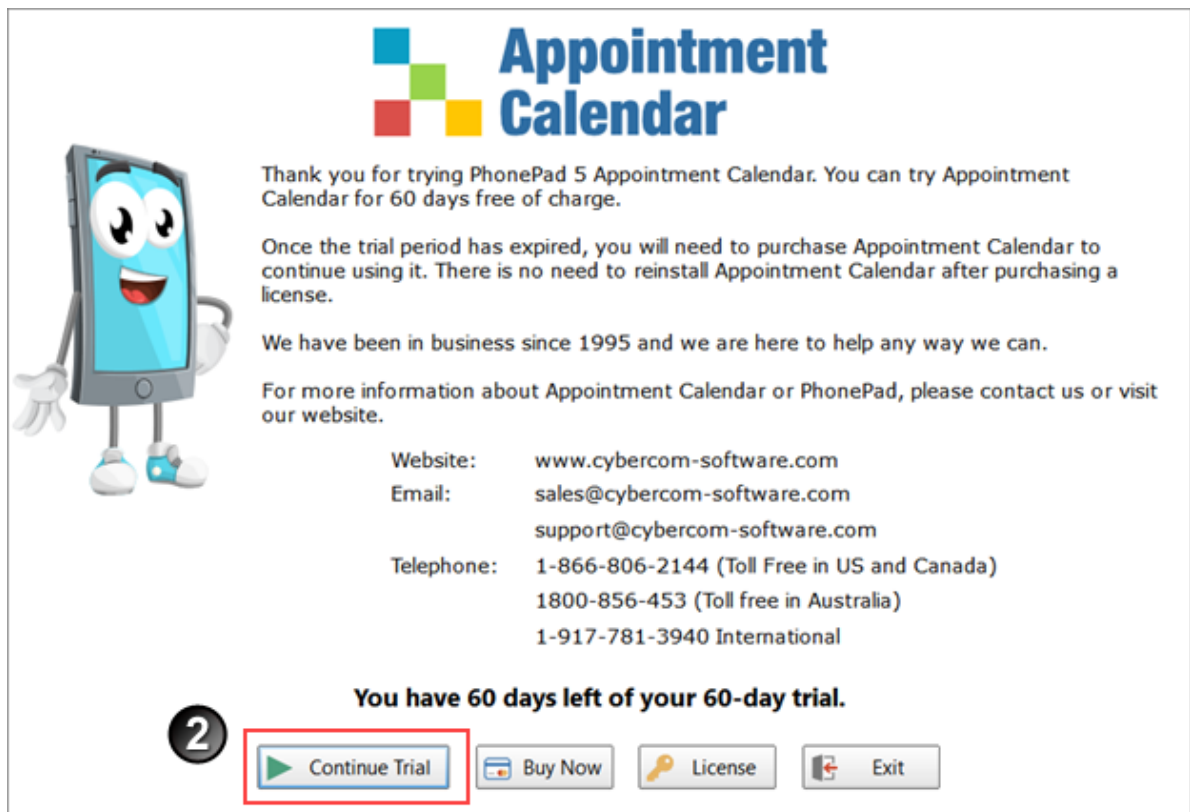
2 - Admin Settings

Now it's time to launch Appointment Calendar so we can have a look at the Admin Settings.

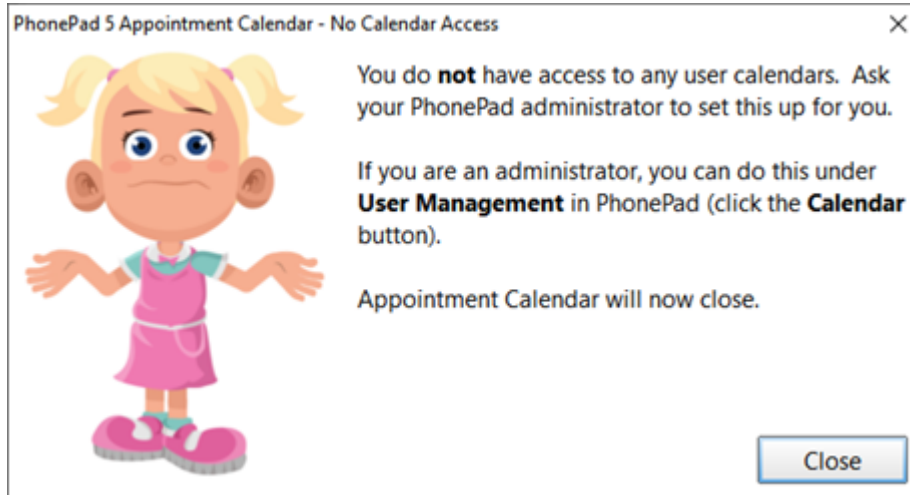
1. Click the **Appointment Calendar** button on the **Home** toolbar tab.



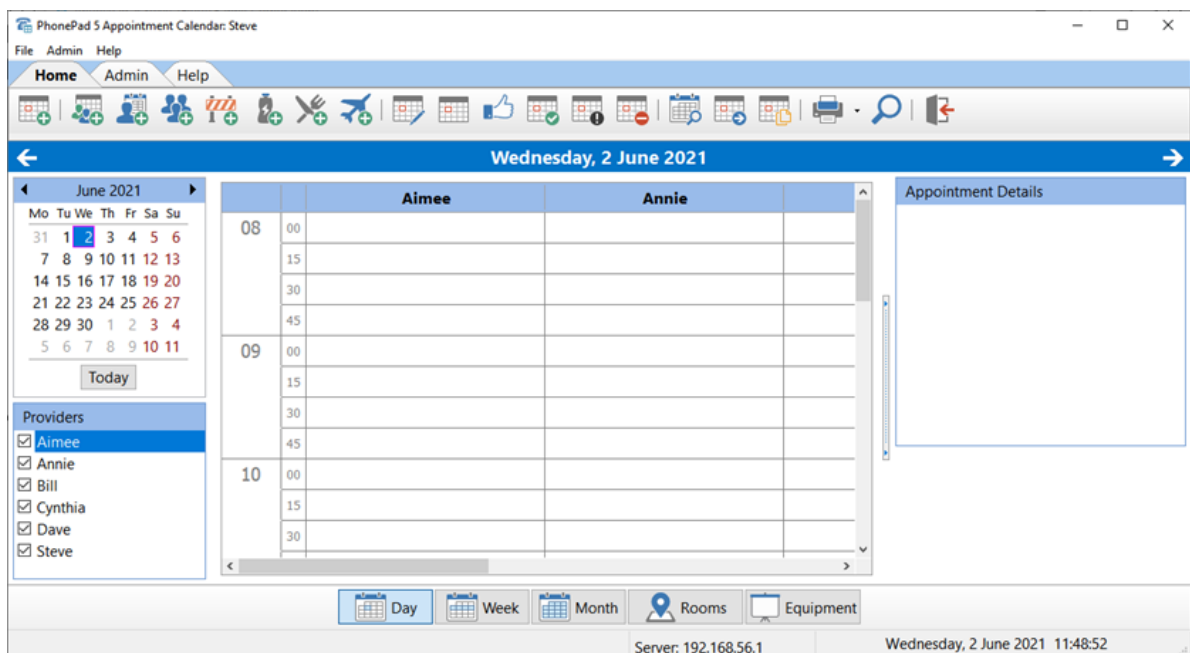
2. If Appointment Calendar is in Trial mode, click the **Continue Trial** button when the Trial screen appears.



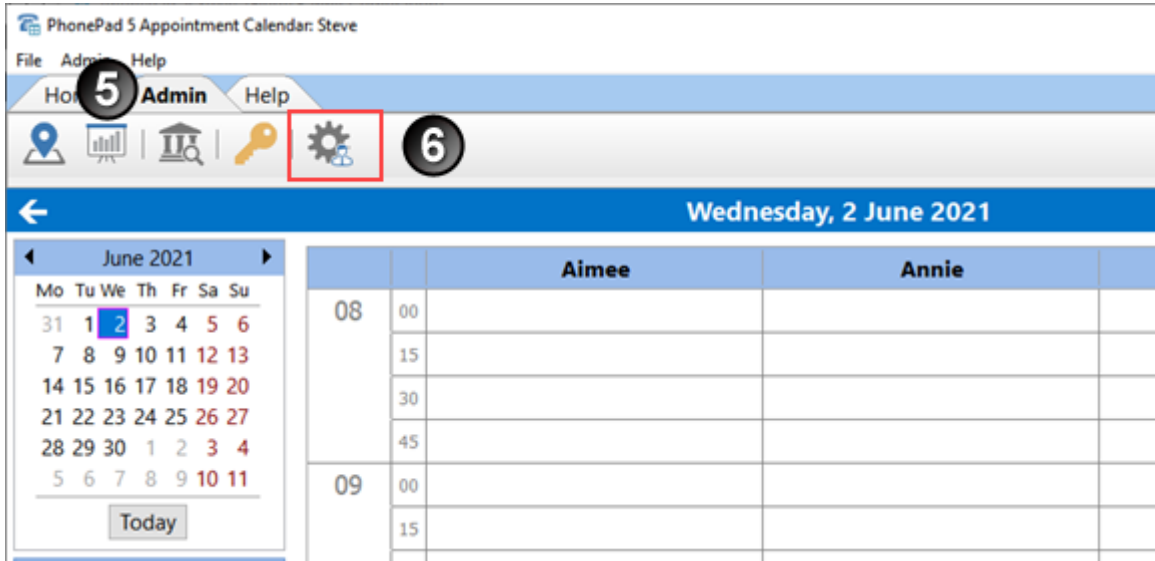
3. If you missed [Step 1](#)¹⁸ then this message will appear. You won't be able to continue until you have done [Step 1](#)¹⁸.



4. Appointment Calendar's main window will appear.



5. Click the **Admin** tab.



6. Click **Admin Settings** button.
7. The **Admin Settings** screen will appear.

Admin Settings

Appointments

Appointment Settings

Appointment Length: 15 mins

First Appointment: 08:00

Last Appointment: 17:00

Skip weekends for Multi-Day appointments

Calendar Setup

First Day of Week: Monday

Time

24 Hour Time (Military Time)

12 Hour Time

New Client Screen

Identification Label: Identification

Identification Hint: Client No, Patient No, etc

Appointment Cancellation

Require Notes on Cancel

User Labeling

Set this to something appropriate for your business.

User Label: User

Appointments

Appointment Name:

Use Client Name

Use Company Name

Client Label: Client

2nd Line:

3rd Line:

Appointment Colors

Standard: Custom

Concurrent: Custom

Miscellaneous: Custom

Meeting: Custom

Personal: Custom

Break: Default

Meal Break: Custom

Leave: Custom

Reset Colors

OK

Cancel

Help

8. Go through each of the settings and make changes as required.

Appointments

There are various settings you can change to customize Appointment Calendar.

Appointment Settings

Appointment Length This is the minimum appointment length in minutes. Appointments can be multiples of this amount.

First Appointment This is the time of the first appointment of the day. If office hours start earlier on some days, set this time to the time of the first appointment for the earliest day.

For example, if the first appointment is normally at 9:00am but one day a week it's at 8:00am, then set this time to 8:00am.

Last Appointment This is the time of the last possible appointment of the day. If office hours are longer on some days, set this time to the last appointment time for the latest day.

For example, if the last appointment is normally at 4:45pm but one day a week the last appointment is 8:45pm, then set this time to 8:45pm.

Skip Weekends When checked, any multi-day appointments that are created won't include weekends.

for Multi-Day Appointments

Appointments

Appointment Name **Use Client Name** - when selected, the name of the client will be displayed on the appointment calendar.

Use Company Name - when selected, the name of the company will be displayed on the appointment calendar.

Client Label The **Client Label** is set to Client by default. You can change this to something else if you prefer, eg. *Patient*.

2nd Line Where an appointment spans 2 or more time slots, you can specify what is displayed in the second time slot. The options are Address, Subject or Phone Number, or you can leave it blank.

3rd Line Where an appointment spans 3 or more time slots, you can specify what is displayed in the third time slot. The options are Address, Subject or Phone Number, or you can leave it blank.

Time

24 Hour Time If you prefer 24 hour time (the default) select this option. The time will be displayed in this format throughout Appointment Calendar.

12 Hour Time If you prefer 12 hour time select this option. The time will be displayed in this format throughout Appointment Calendar.

New Client Screen

Identification Label Appointment Calendar provides an option for adding new clients directly in Appointment Calendar, instead of having to switch to PhonePad and entering them in the Address Book.

This setting changes the **Identification** (1) label on the **New Client** screen. The default is "Identification".

Identification Hint This setting changes the **Identification Hint** (2) on the **New Client** screen. The default is "Client No, Patient No, etc.".

Appointment Cancelling

Require Notes on Cancel When checked, users will be required to enter a note when canceling an appointment.

Appointment Colors

Appointment Concurrent Meeting Allows you to change the color of the various appointment colors.

Personal
Break
Lunch
Leave

Reset Colors Resets the colors back to their defaults.

Business Settings

This screen enables you to set the business hours for each day of the week. Use the check boxes to select the days you work. Set the start and end times for each day.

The screenshot shows the 'Business Settings' dialog box within the 'Admin Settings' application. The dialog has a blue header and a close button (X) in the top right corner. On the left side of the dialog, there is a sidebar with icons for 'Appointments', 'Business Settings', 'Toolbars', and 'Admin'. The main area of the dialog is titled 'Business Hours' and contains a table of days with checkboxes and time pickers.

Day	Selected	From	To
Monday	<input checked="" type="checkbox"/>	08:00	17:00
Tuesday	<input checked="" type="checkbox"/>	08:00	17:00
Wednesday	<input checked="" type="checkbox"/>	08:00	17:00
Thursday	<input checked="" type="checkbox"/>	08:00	17:00
Friday	<input checked="" type="checkbox"/>	08:00	17:00
Saturday	<input type="checkbox"/>	08:00	17:00
Sunday	<input type="checkbox"/>	08:00	17:00

Below the table, there are four buttons: 'Set All' (for From), 'Set All' (for To), 'Reset All' (for From), and 'Reset All' (for To). On the right side of the dialog, there are three buttons: 'OK', 'Cancel', and 'Help'.

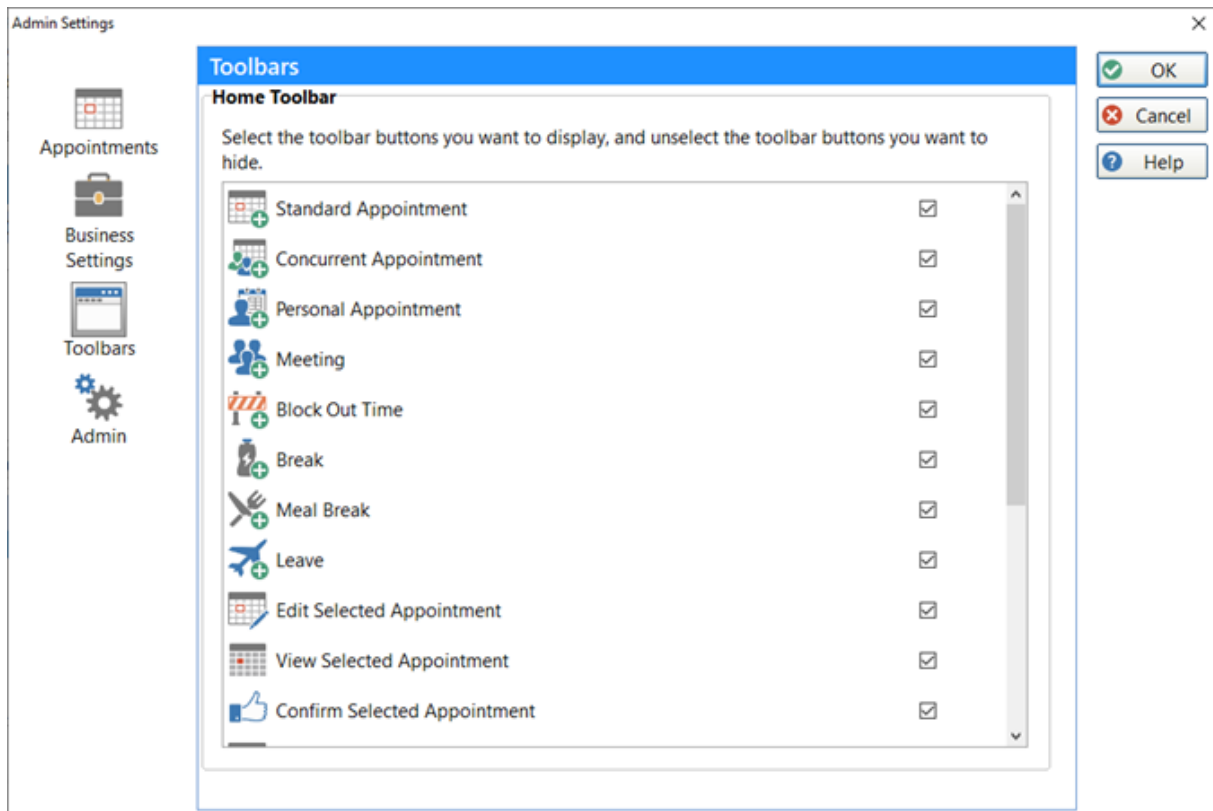
Business Hours

Set All Sets all times to the same time Monday is set to. For example, if the From is set to 10:00, clicking this button will change all days to that time.

Reset All Resets all times to the defaults.

Toolbars

Appointment Calendar has lots of options on the [Home toolbar](#)³³, with quite a few different [appointment types](#)⁴⁸. If you don't use all of these buttons then you can easily hide the ones you don't use.



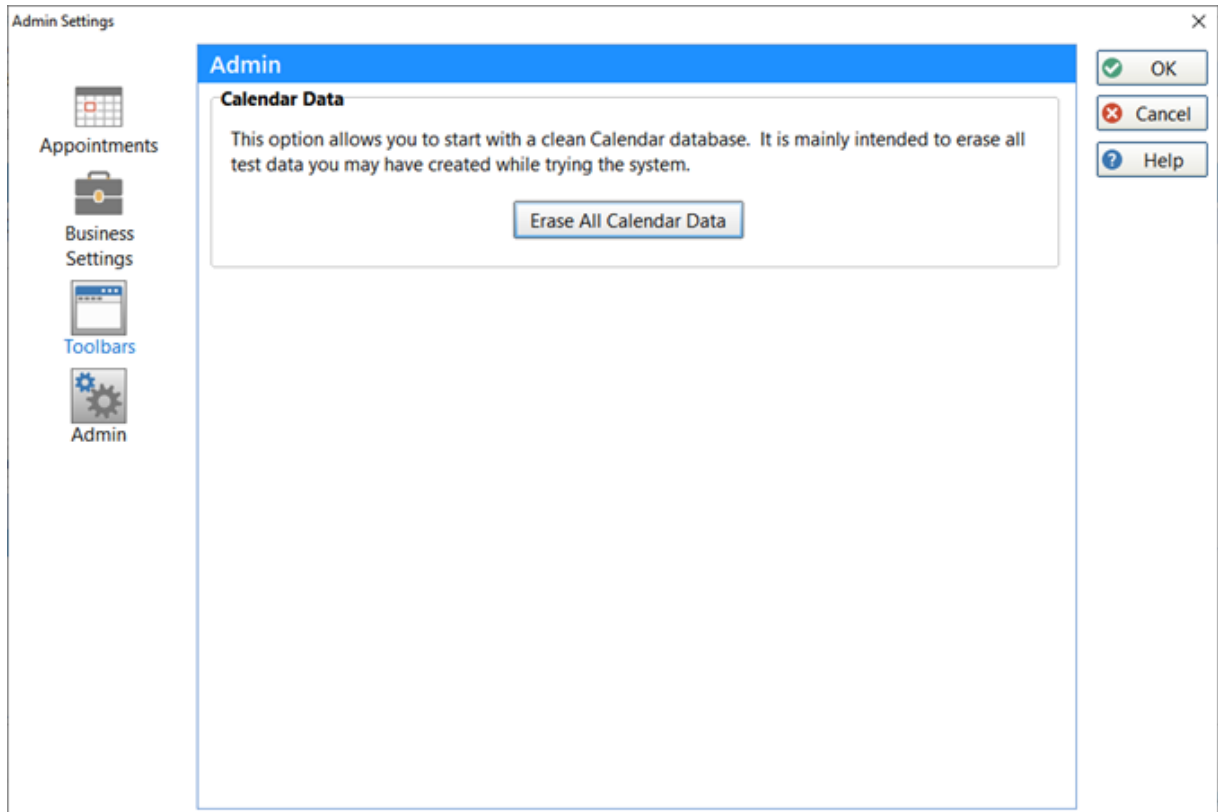
Unselect the buttons you don't need and they will no longer appear on the [Home toolbar](#)³³. Make sure you click **OK** to save your changes.

Admin

Use this option with care. It will delete all of your Appointment Calendar data.

You can use this option to reset your Appointment Calendar data if you entered dummy data during your trial period.

To erase your data, click the **Erase All Calendar Data** button. You will be asked twice to confirm the deletion.



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Chapter

5

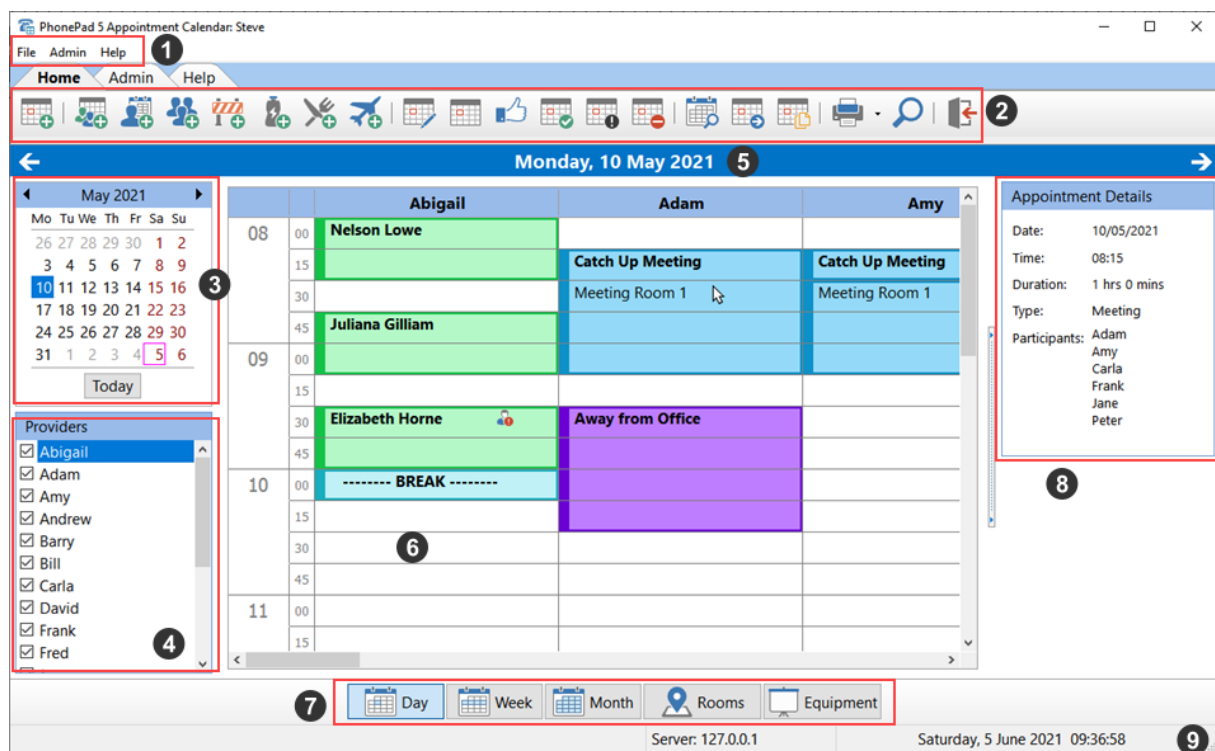
User Interface

User Interface

Let's have a look at Appointment Calendar's user interface.

Main Window

When you start Appointment Calendar, you will be presented with the main window. By default, it will be in [Day view](#)³⁹.



- 1 First up is the menu bar at the top of the window. The options on the menu bar are the same as the options on the [toolbars](#)³³.
- 2 This is the toolbar area. Appointment Calendar has 3 toolbars, each selectable via the toolbar tabs.
- 3 When you start Appointment Calendar, the calendar will display the current month. Today's date will be automatically selected. You can change the day by selecting it from the calendar. You can change months by clicking on the **left** and **right** arrows, or by

clicking on the month. The year can be changed by clicking on the **year**. The **Today** button will take you straight to today's date.

- 4** This is a list of users, or providers as they are known as in Appointment Calendar. Your administrator will have given you access to the calendars of various users. Their names will appear in this list so that you can manage their calendars. You can hide any user calendar by unchecking the checkbox next to their name.
- 5** This is the currently selected date. The date will be in the format specified by the regional settings in your computer. In the Day View, clicking on the left arrow will take you to the previous day, and clicking on the right arrow will take you to the next day.
- 6** This is the appointment area. When a provider has appointments, they will be displayed in their column.
- 7** These buttons allow you to select the view you want, ie. Day, Week or Month. There are also views for Rooms and Equipment bookings.
- 8** The Appointment Details area shows details of the appointment that the mouse cursor is hovering over. In this example the appointment is a meeting, so it's showing details of the meeting including the participants.
- 9** The status bar shows hints, the IP Address of the Server you are connected to, and the current date and time (the format is dependent on your regional settings).

Toolbars

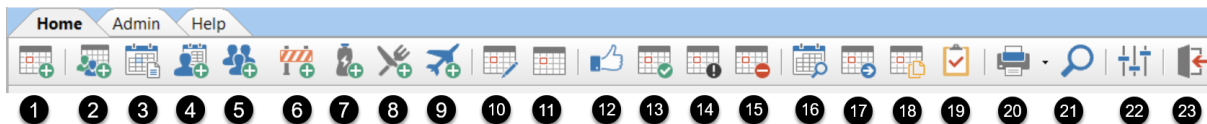
Appointment Calendar has 3 toolbars, although if you're not a system administrator then you'll see only 2.

A toolbar can be accessed by clicking on one of the toolbar tabs.

To use a feature just click on the appropriate button.

Home Toolbar

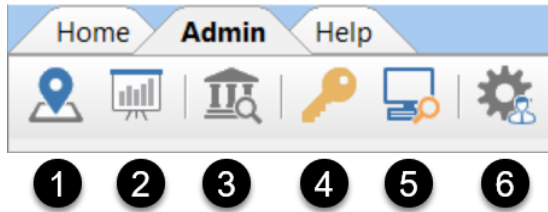
The Home toolbar has a whole bunch of buttons. This may at first seem a little intimidating but don't worry, you will learn the feature of each button quickly. If you don't need all of the buttons an administrator can hide them.



- 1 Add a standard appointment.
- 2 Add a concurrent appointment.
- 3 Add a personal appointment.
- 4 Add a miscellaneous appointment.
- 5 Schedule a meeting.
- 6 Block out some time.
- 7 Add a break.
- 8 Add a meal break.
- 9 Add leave.
- 10 Edit appointment.
- 11 View appointment.
- 12 Confirm appointment.
- 13 Mark appointment as completed.
- 14 Mark appointment as a no show.
- 15 Cancel appointment.
- 16 Find next available appointment.
- 17 Reschedule appointment.
- 18 Copy appointment.
- 19 Open the To Do List.
- 19 Print options.
- 20 Search.
- 21 User Preferences.
- 22 Exit Appointment Calendar.

Admin Toolbar

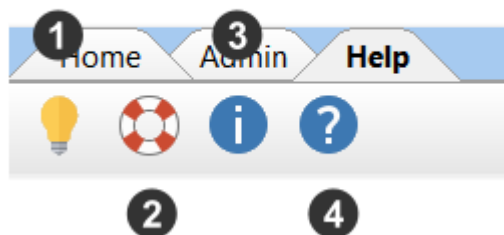
Enter topic text here.



- 1 Manage rooms (locations).
- 2 Manage Equipment.
- 3 View appointment history.
- 4 License Appointment Calendar.
- 5 Log Viewer.
- 6 Admin Settings

Help Toolbar

Enter topic text here.



- 1 Send us suggestions for new features or other ways we can improve Appointment Calendar.

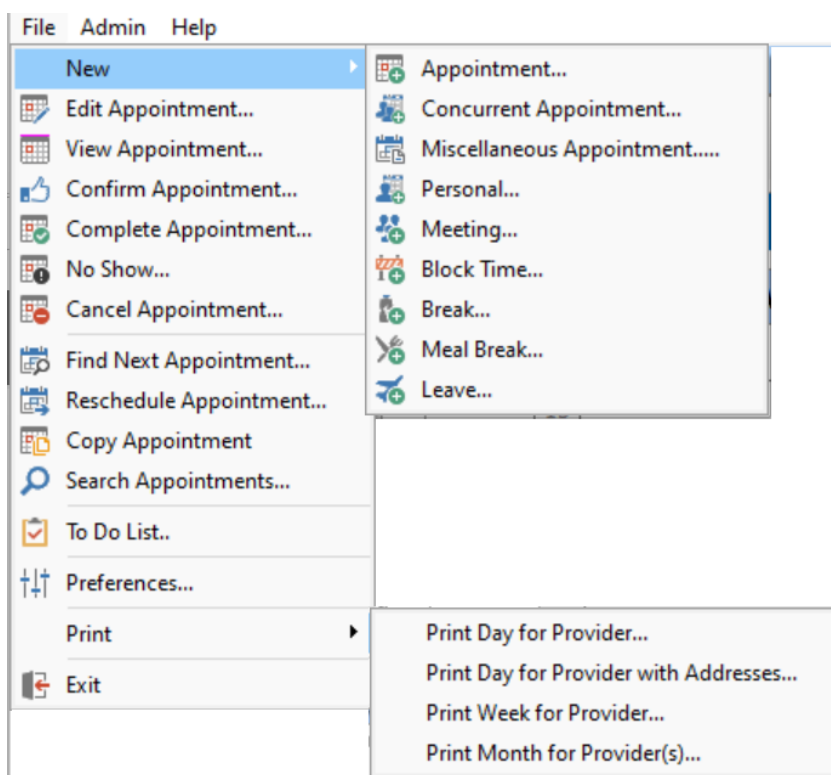
- 2 Log a support request if you are experiencing any problems with Appointment Calendar.
- 3 View information about Appointment Calendar.
- 4 Access help.

Menus

Like most Windows software there are menus that have items that match the [toolbars](#)³³.

File Menu

The main features of Appointment Calendar are accessible from the **File** menu.



- New Appointment* Add a standard appointment.
- Concurrent Appointment* Add a concurrent appointment.
- Miscellaneous Appointment*
- Personal*
- Meeting*
- Block Time*
- Break*
- Meal Break*
- Leave*

<i>Miscellaneous</i>	Add a miscellaneous appointment.
<i>Personal</i>	Add a personal appointment.
<i>Meeting</i>	Add a meeting.
<i>Block Time</i>	Block out some time.
<i>Break</i>	Add a break.
<i>Lunch</i>	Add a meal break.
<i>Leave</i>	Add leave.
<i>Edit Appointment</i>	Edit the selected appointment.
<i>View Appointment</i>	View the selected appointment.
<i>Confirm Appointment</i>	Confirm the selected appointment.
<i>Complete Appointment</i>	Mark the selected appointment as completed.
<i>No Show</i>	Mark the selected appointment as a no show.
<i>Cancel Appointment</i>	Cancel the selected appointment.
<i>Find Next Appointment</i>	Find next available appointment.
<i>Reschedule Appointment</i>	Change the appointment to another date and/or time.
<i>Copy Appointment</i>	Make an exact copy of the selected appointment one a different day and/or time.
<i>Search Appointment</i>	Search all appointments for specified search text.

ts

To Do List Open the To Do List.

Preferences Accesses the user's personal settings.

Print *Print Day for Provider* Print the day's appointments for the selected provider.

Print Day for Provider with Addresses Print the day's appointments for the selected provider with the addresses of clients.

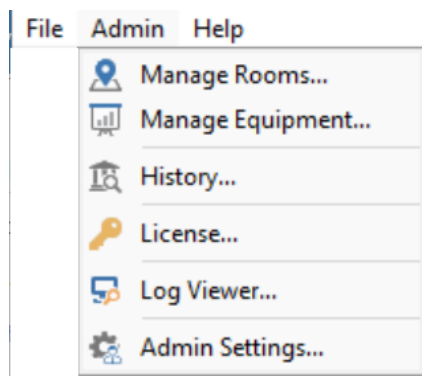
Print Week for Provider Print the week's appointments for the selected provider.

Print Day for All Providers Print the day's appointments for all providers.

Exit Exit Appointment Calendar.

Admin Menu

The Admin menu is only visible and accessible to users with System Administrator access.



Manage Rooms Create, edit and delete meeting rooms.

Manage Equipment Create, edit and delete equipment.

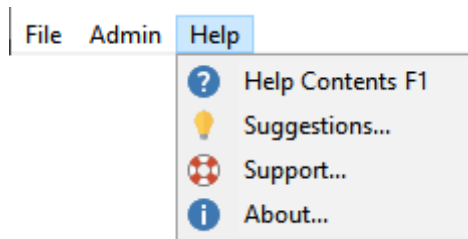
History View the appointment history log.

License License your copy of Appointment Calendar. Important: Appointment Calendar requires a separate license to PhonePad.

Log Viewer Opens the Log Viewer.
Admin Manage the Admin settings.
Settings

Help Menu

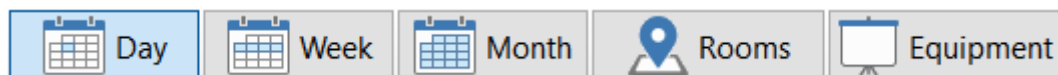
Need help? This is the menu for you.



Help Displays the help file.
Contents
Suggestions Send us your suggestions, ideas and feedback.
Support Having problems? Send a support request to us.
About Displays information about Appointment Calendar.

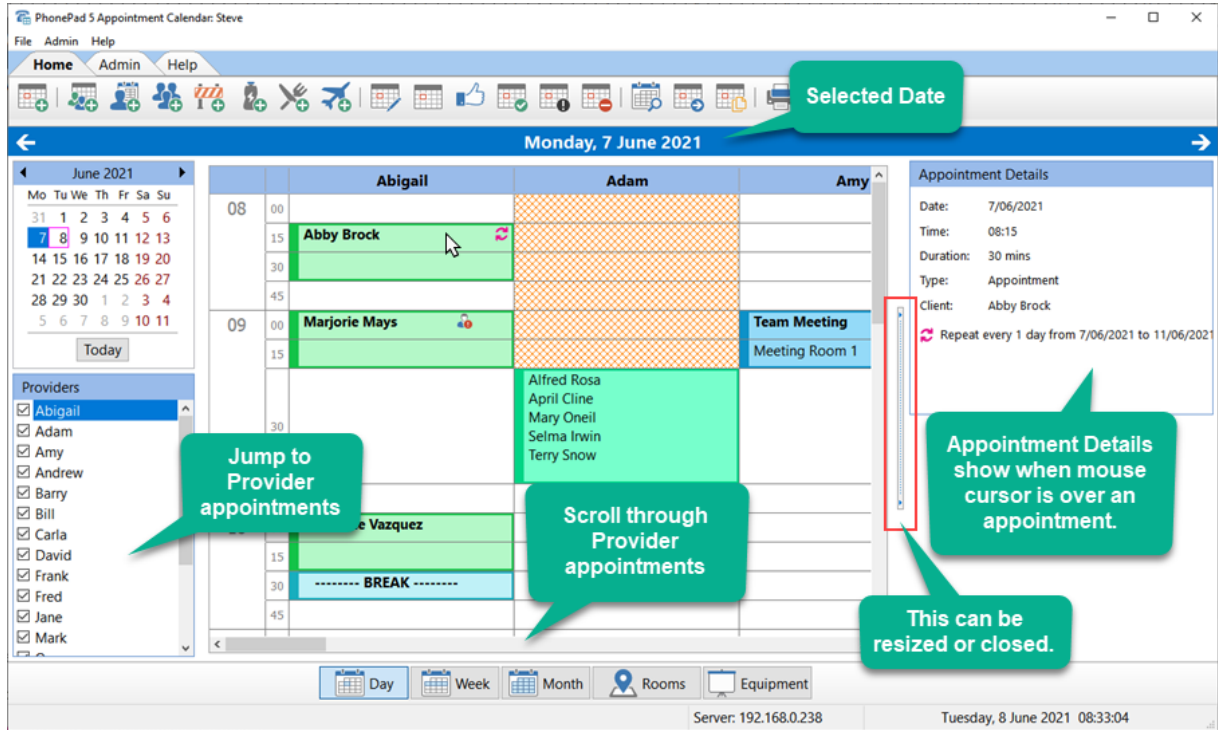
Views

Appointment Calendar views are controlled by the Views toolbar.



Day View

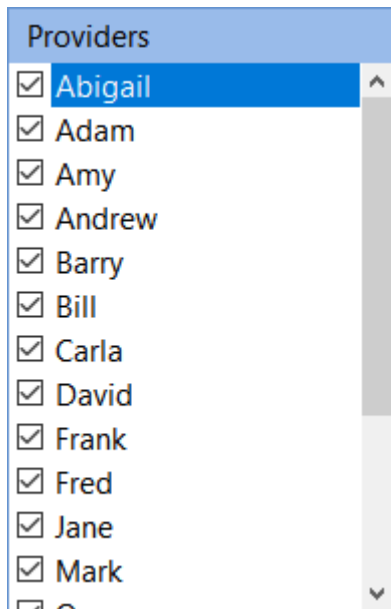
Day View shows all appointments for all providers on the selected day.




There are a number of [appointment types](#) ⁴⁸ available, each with their own color so that they can be easily identified.

Providers List

The Providers list shows all of the calendars you have access to. Access is set up by your PhonePad System Administrator.





You can hide a Provider's calendar by unchecking the checkbox next to their name.


 In Day View where the Provider calendars don't all fit on the screen, you can either scroll to their calendar, or click on their name in the Providers list to jump straight to their calendar.

Appointment Status Icons

Appointments can display a number of different status icons:

 Indicates an appointment that repeats.

 Indicates a no-show for an appointment.

 Indicates a confirmed appointment.

 Indicates a completed appointment.

Week View

Week View shows all appointments for the selected provider on the selected day.

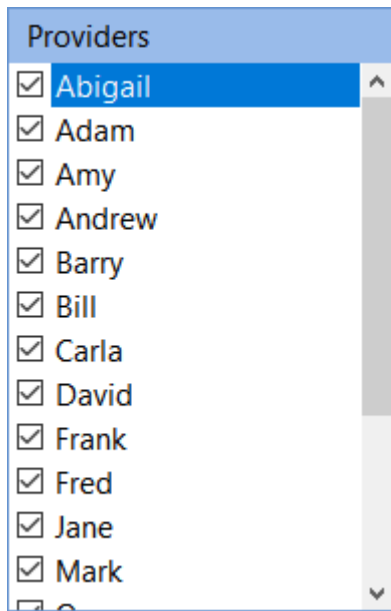
To view a provider's calendar, click on their name in the Providers list.



In Week View, clicking on the day in the calendar will take you straight to that day in the calendar view..

Providers List

The Providers list shows all of the calendars you have access to. Access is set up by your PhonePad System Administrator.



Select a Provider's name to display their calendar in Week View.

You can hide a Provider's calendar by unchecking the checkbox next to their name.

Appointment Status Icons

Appointments can display a number of different status icons:



Indicates an appointment that repeats.



Indicates a no-show for an appointment.



Indicates a confirmed appointment.

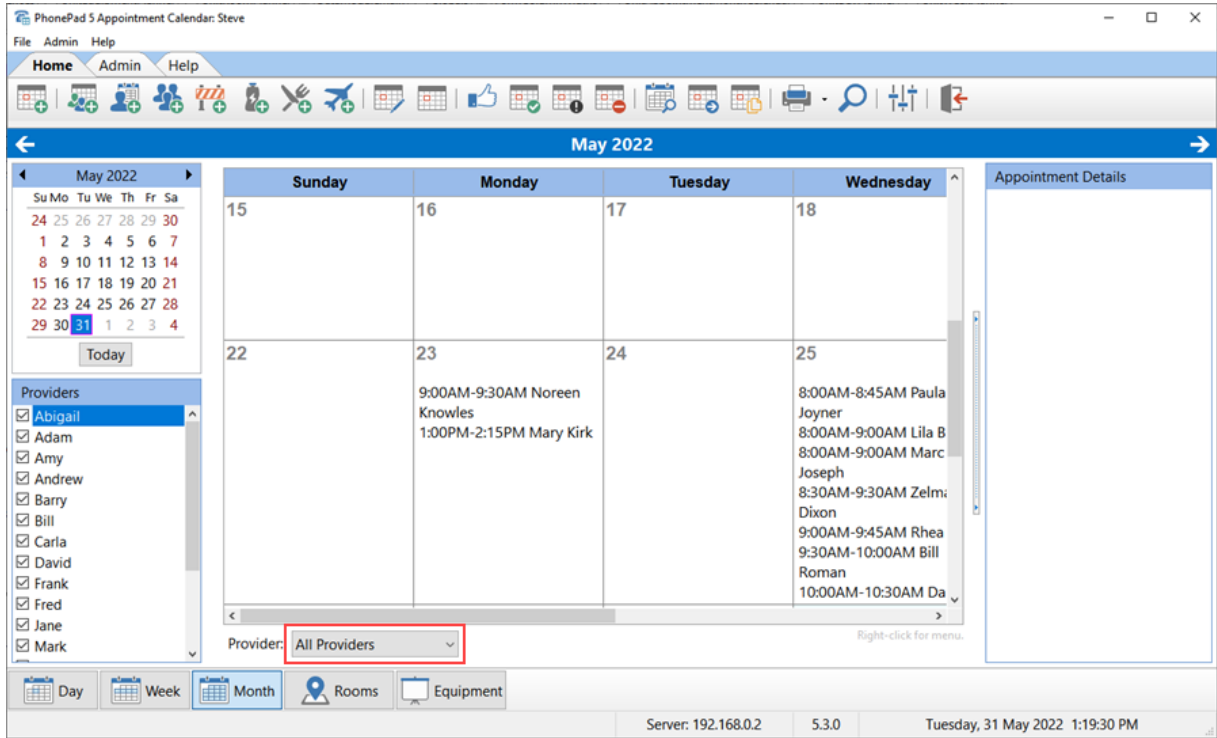


Indicates a completed appointment.

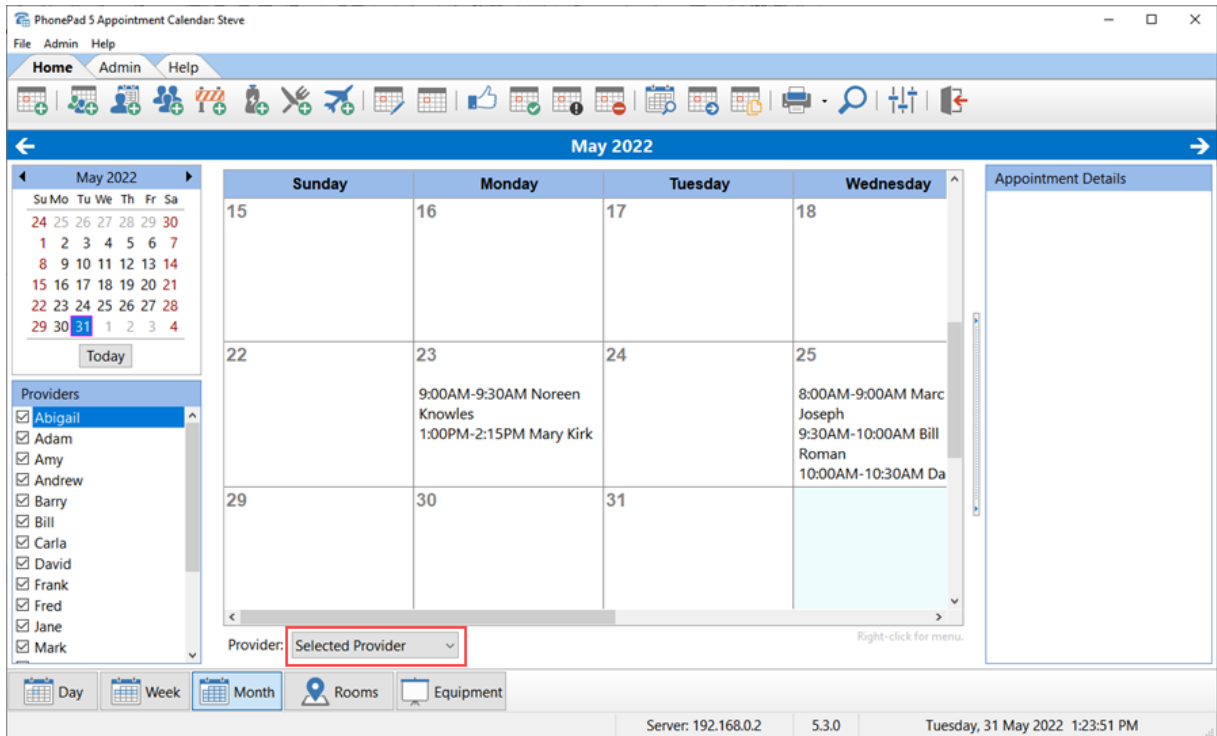
Month View

The Month View lists all appointments for each day.

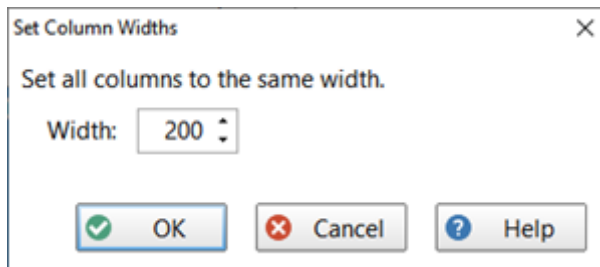
When **All Providers** is selected, you can see all appointments for the selected month.




When a single provider is selected, you can see all of the appointments for that provider.



If you want to change the width of the columns, right-click on the Month calendar and select **Set Column Widths**:



 Clicking on a day in Month View will take you straight to that day either Day View or Week View (depending on whether you have All Providers selected or a specific provider).

Rooms View

The Rooms view displays all of the times rooms are booked for appointments.

Equipment View

The Equipment view displays all of the times equipment is booked for appointments.

The screenshot shows the 'Appointment Calendar' application window. The title bar reads 'PhonePad 5 Appointment Calendar: Steve'. The menu bar includes 'File', 'Admin', and 'Help'. Below the menu bar is a toolbar with various icons. The main header displays 'Wednesday, 9 June 2021'. On the left, there is a calendar for June 2021 with the 9th highlighted. Below the calendar is a 'Providers' list with checkboxes for Abigail, Adam, Amy, Andrew, Barry, Bill, and Carla. The main area is a grid with columns for 'Whiteboard' and 'Projector' and rows for time slots from 08:00 to 10:45. Two 'Team Meeting' appointments are booked for both pieces of equipment from 09:00 to 09:30. On the right, the 'Appointment Details' panel shows: Date: 7/06/2021, Time: 09:00, Duration: 30 mins, Type: Meeting, and Participants: Amy, Andrew, Barry, Bill, Carla. At the bottom, there are view options for Day, Week, Month, Rooms, and Equipment. The status bar at the bottom shows 'Server: 192.168.0.238' and 'Wednesday, 9 June 2021 12:26:45'.

Chapter

6

Appointment Types

Appointment Types

There are 8 appointment "types" in Appointment Calendar. Each of the following topics outlines the differences between them.

- Standard
- Concurrent
- Personal
- Meeting
- Blocked Out Time
- Break
- Meal Break
- Leave

Standard Appointment

A standard appointment is the most used appointment type.

New Appointment

Schedule an Appointment

Date: 1 23/02/2024 **Time:** 2 09:00 **Duration:** 3 45 minutes 7

Client: 4 Jon Rocha Search New Edit

User: 8 Aimee 5 6 9 History

Room: 10

Notes: 11 12

13 Repeat No repeat.

14 All Day

Address: 15 16 Addresses 17

Email: 18


Phone: 19

Created by: Aimee **Updated by:**


Date Created: **Date Updated:**

OK Cancel Help

- 1 Date of the appointment. This can be changed to another date.
- 2 Time of the appointment. This can be changed to another time.
- 3 Duration of the appointment in minutes. Use the drop-down list to select a duration for the appointment.
- 4 Name of the client for the appointment. Select a client from the drop-down list.

- 5 Instead of using the drop-down list to select a client, you can use the Search button to search for them in the Address Book
- 6 Click the **New** button to add a new client. The new client will be added to the PhonePad Address Book.
- 7 Edit the client's Address Book information.
- 8 You can change the user the appointment is assigned to by selecting a different user from the drop-down list.
- 9 View the appointment history of this client by clicking the **History** button. See [Client History](#) 
- 10 Click the ... button to assign a room for this appointment.
- 11 Click this button to clear any room assignment.
- 12 Add notes about the client or appointment.
- 13 Make the appointment repeat by clicking the **Repeat** button.
- 14 For an All Day appointment, switch **All Day** to on.
- 15 This can be used for appointments that take place outside of the office. You can enter an address, or select it from the Address Book using the **Addresses** button.
- 16 The **Addresses** button can be used to look up a Client's address and add it to the Address field.
- 17 View the Address Book entry for the selected client.
- 18 You can enter the client's email address here. If you use the **Addresses** button the information will be filled in for you.
- 19 You can enter the client's phone number here. If you use the **Addresses** button the information will be filled in for you.

Example of a standard appointment in the calendar view.

08	00	
	15	Abby Brock 
	30	
	45	

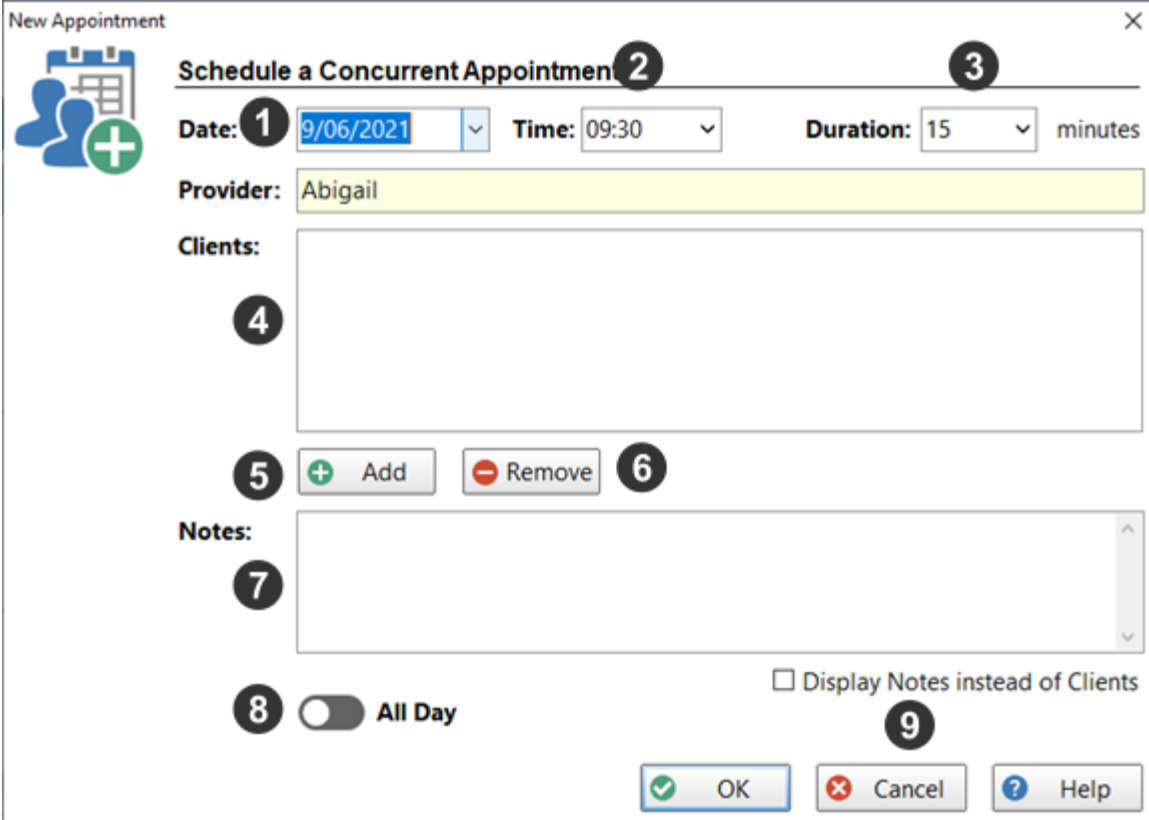
See Also:

[Adding an Appointment](#) ⁶⁶

Concurrent Appointment

The Concurrent Appointment type enables you to have multiple clients for the same appointment.

This can be useful where a doctor may see a number of patients in the same time block in different rooms.



New Appointment ×

Schedule a Concurrent Appointment 2 3

Date: 1 9/06/2021 Time: 09:30 Duration: 15 minutes

Provider: Abigail

Clients:

+ Add - Remove 6

Notes:

8 All Day Display Notes instead of Clients

OK Cancel Help 9

- 1 Date of the appointment. This can be changed to another date.
- 2 Time of the appointment. This can be changed to another time.
- 3 Duration of the appointment in minutes. Use the drop-down list to select a duration for the appointment.
- 4 List of clients. These are added using the **Add** button, and Removed using the **Remove** button.
- 5 Click the **Add** button to add a client to the appointment.
- 6 Click the **Remove** button to remove a client from the appointment.
- 7 Add notes about the client or appointment.
- 8 For an All Day appointment, switch **All Day** to on.
- 9 When checked, the **Notes** field is displayed in the appointment calendar instead of the list of clients.

Example of a concurrent appointment in the calendar view.



See Also:

[Adding a Concurrent Appointment](#) ⁷⁸

Miscellaneous Appointment

The Miscellaneous appointment type allows you to enter free text.

The screenshot shows a 'New Appointment' dialog box with the following elements:

- Date:** 23/02/2024
- Time:** 09:00
- Duration:** 15 minutes
- User:** Aimee
- Room:** (empty)
- Text:** Fred Smith, Jane Jones, Peter Pumpkineater, Jack Frost
- Notes:** (empty)
- Repeat:** No repeat.
- All Day:** (disabled)
- Created by:** Samantha
- Updated by:** (empty)
- Date Created:** (empty)
- Date Updated:** (empty)

Buttons at the bottom: OK, Cancel, Help.

- 1 Date of the appointment. This can be changed to another date.
- 2 Time of the appointment. This can be changed to another time.
- 3 Duration of the appointment in minutes. Use the drop-down list to select a duration for the appointment.
- 4 The person the appointment is assigned to.

- 5 Select a room for the appointment.
- 6 Clear the room assignment.
- 7 Enter any text in here that you like. It could be a list of clients, or non-clients. Or it could be something entirely different.
- 8 Add notes about the client or appointment.
- 9 Make the appointment repeat by clicking the **Repeat** button.
- 10 For an All Day appointment, switch **All Day** to on.

Example of a miscellaneous appointment in the calendar view:

09	00	Fred Smith Jane Jones Emma Green John Brown
	15	Meeting Room 2
	30	
	45	
10	00	

Personal Appointment

A Personal Appointment is an appointment for the selected provider. It could last from a few minutes to an entire day.

- 1 Date of the appointment. This can be changed to another date.
- 2 Time of the appointment. This can be changed to another time.
- 3 Duration of the appointment in minutes. Use the drop-down list to select a duration for the appointment.
- 4 The **Subject** can be anything you like, eg. "Doctor's Appointment", "Away", "Personal", etc.
- 5 For an All Day appointment, switch **All Day** to on.

Example of a personal appointment in the calendar view.

	45	
11	00	Doctor's Appointment.
	15	
	30	
	45	
12	00	

Meeting

Meetings don't involve clients at all. They intended for scheduling an appointment with multiple staff (users).

The screenshot shows the 'Add Meeting' dialog box with the following fields and controls:

- 1** Date: 9/06/2021
- 2** Time: 10:00
- 3** Duration: 15 minutes
- 4** Subject: Team Meeting
- 5** Select Participants and Resources...
- 6** Clear
- 7** Participants: Amy, Andrew, David, Oscar, Rachel, Rikke
- 8** Room: Meeting Room 1
- 9** External Location (checkbox)
- 10** Equipment
- 11** All Day (toggle)

Buttons at the bottom: OK, Cancel, Help.

- 1** Date of the appointment. This can be changed to another date. This will be disabled once you have selected participants for the meeting.
- 2** Time of the appointment. This can be changed to another time. This will be disabled once you have selected participants for the meeting.
- 3** Duration of the appointment in minutes. Use the drop-down list to select a duration for the appointment. This will be disabled once you have selected participants for the meeting.
- 4** Enter a **Subject** for the meeting.

- 5 Click the **Select Participants and Resources** button to select users, a meeting room, and equipment of the meeting.
- 6 Clears all selected participants and resources for the meeting.
- 7 A list of participants for the meeting.
- 8 The room selected for the meeting.
- 9 If checked, it indicates an external location for the meeting. A meeting room will not need to be selected.
- 10 A list of resources selected for the meeting.
- 11 For an All Day appointment, switch **All Day** to on.

Example of a meeting in the calendar view.

	09	
	00	Team Meeting
	15	Meeting Room 1

Blocked Out Time

This is not really an appointment type. It is time blocked out to prevent appointments from being scheduled.

It can be used for providers that start and/or finish at a different time to everyone else, rostered days off, or basically any reason you like.

Block Time Period
✕

Block Out Appointment Times

Date: **Time:** **Duration:** minutes

Provider:

All day event

- 1 Date of the blocked out time. This can be changed to another date.
- 2 Start time of the blocked out time. This can be changed to another time.
- 3 Duration of the blocked out time in minutes. Use the drop-down list to select a duration for the blocked out time.
- 4 Make the blocked out time repeat by clicking the **Repeat** button.
- 5 To block out the entire day, switch **All Day** to on.

Example of blocked out time in the calendar view.

15	00	
	15	
	30	
	45	
16	00	
	15	
	30	

Break

You can use the Break type to schedule breaks for providers. These can be set to repeat.

Add Break

Schedule a Break

1 Date: 11/06/2021 **2** Time: 10:30 **3** Duration: 15 minutes

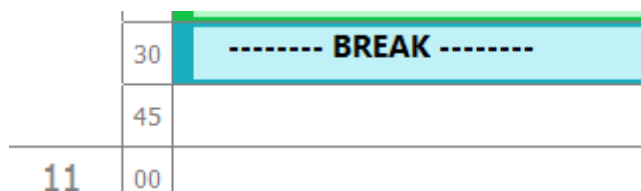
Provider: Amy

4 Repeat: No repeat.

OK Cancel Help

- 1 Date of the appointment. This can be changed to another date.
- 2 Time of the appointment. This can be changed to another time.
- 3 Duration of the appointment in minutes. Use the drop-down list to select a duration for the appointment.
- 4 Make the appointment repeat by clicking the **Repeat** button.

Example of a break in the calendar view.

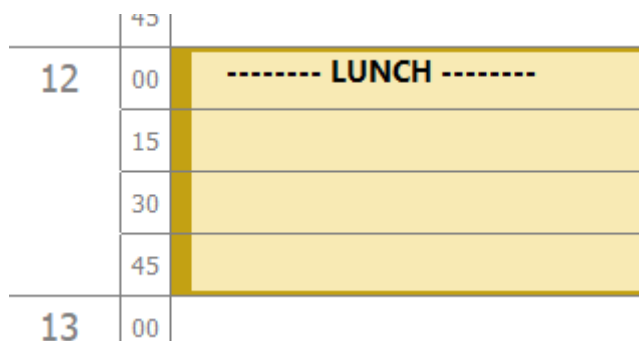


Meal Break

You can schedule meal breaks for providers using this type of appointment. These can be set to repeat.

- 1 Date of the appointment. This can be changed to another date.
- 2 Time of the appointment. This can be changed to another time.
- 3 Duration of the appointment in minutes. Use the drop-down list to select a duration for the appointment.
- 4 The **Type** is selected from the drop-down list. Options are: *Breakfast*, *Lunch* and *Dinner*.
- 5 Make the appointment repeat by clicking the **Repeat** button.

Example of a meal break in the calendar view.



Leave

Use the Leave type to create leave for a provider.

- 1 Start Date of the leave.
- 2 End Date of the leave.
- 3 The number of days. If you select the End Date this will be automatically calculated. If you enter the number of days the End Date will be changed to reflect this.

Example of Leave:

08	00	----- LEAVE -----
	15	
	30	
	45	
09	00	
	15	

This page intentionally left blank.

Chapter

7

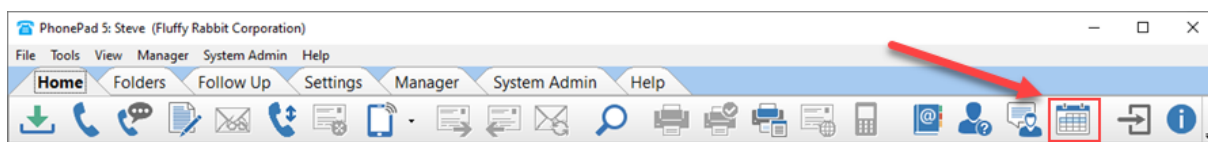
Using Appointment Calendar

Using Appointment Calendar

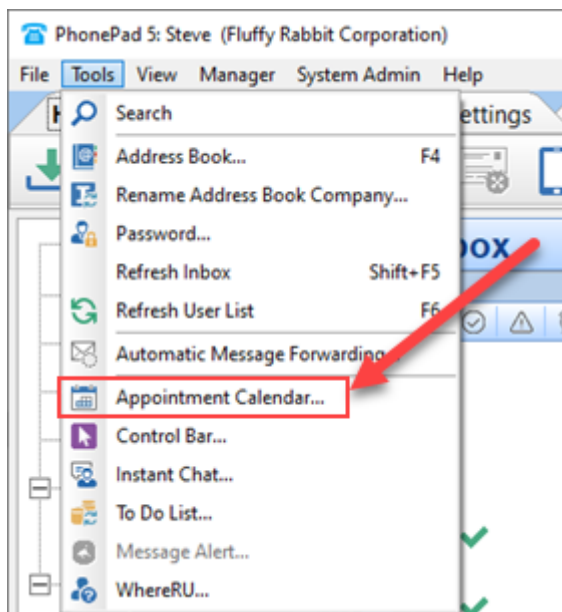
Let's start using Appointment Calendar.

Starting Appointment Calendar

You can launch Appointment Calendar by clicking on the **Appointment Calendar** button on the **Home** toolbar in PhonePad.





You can also start Appointment Calendar by selecting **Appointment Calendar** from the **Tools** menu.



The Trial Screen

If you are trialing Appointment Calendar then the following screen will appear.

Thank you for trying PhonePad 5 Appointment Calendar. You can try Appointment Calendar for 60 days free of charge.

Once the trial period has expired, you will need to purchase Appointment Calendar to continue using it. There is no need to reinstall Appointment Calendar after purchasing a license.

We have been in business since 1995 and we are here to help any way we can.

For more information about Appointment Calendar or PhonePad, please contact us or visit our website.

Website: www.cybercom-software.com
 Email: sales@cybercom-software.com
support@cybercom-software.com
 Telephone: 1-866-806-2144 (Toll Free in US and Canada)
 1800-856-453 (Toll free in Australia)
 1-917-781-3940 International

You have 60 days left of your 60-day trial.

Continue Click **Continue Trial** to continue using Appointment Calendar. This button will be *Disabled* once your trial period expires.

Buy Now Click **Buy Now** to go to the [Buy Now page on our website](#) where you can purchase Appointment Calendar.

License Click **License** to [license your copy of Appointment Calendar](#)¹²⁵ using the details you receive after purchasing it.

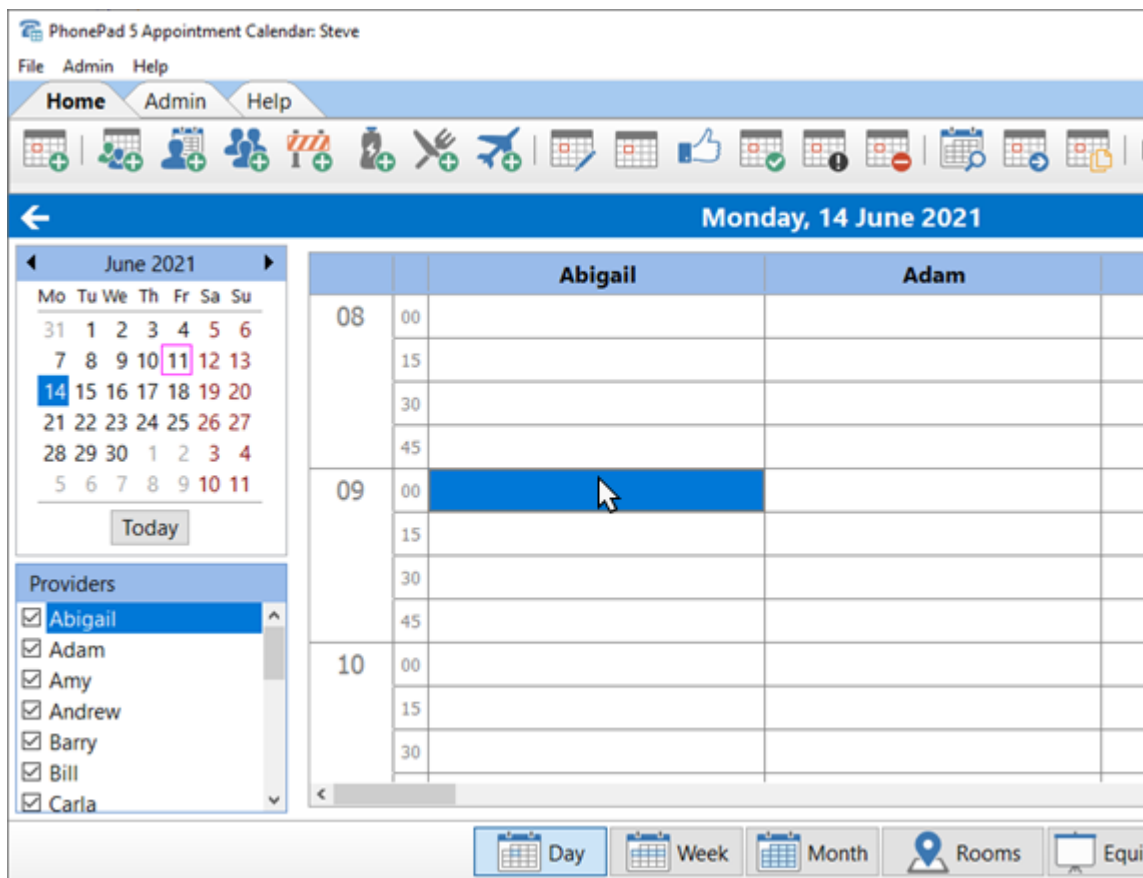
Exit Click **Exit** to close the trial screen and Appointment Calendar.

Click the **Continue Trial** button to continue opening Appointment Calendar.

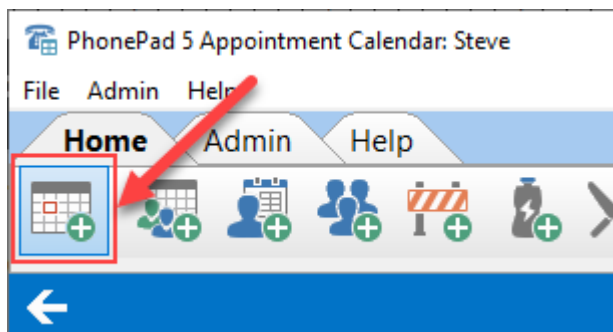
Adding an Appointment

We'll cover adding a Standard Appointment here, but adding other [appointment types](#)⁴⁸ is very similar.

1. Click in a blank appointment slot in a User's column.



2. Click the **Add Appointment** button (or select **New > Appointment** from the **File** menu).



3. Select a **Duration** for the appointment.

Schedule an Appointment

Date: 14/06/2021 **Time:** 09:00 **Duration:** 30 mi

Client:

Provider: Abigail

Notes:

Duration dropdown menu options: 30, 45, 60, 75, 90, 105, 120, 135

4. Select a client from the drop-down list, or search for a client by typing their name.

Schedule an Appointment

Date: 14/06/2021 **Time:** 09:00 **Duration:**

Client:

Provider: Aaron Barnett
Aaron Drake
Aaron Fisher
Aaron Tate
Abby Barlow
Abby Brock
Abby Brooks
Abby Drake

Notes:

5. If the Client doesn't exist in the list, you can add them by clicking the **New** button (see [Adding a Client from an Appointment](#) (72)).
6. If you need to allocate a room for the appointment, click on the Room button.

Schedule an Appointment

Date: 1/03/2024 **Time:** 09:00 **Duration:** 15 minutes

Client: Juliet Elliott Search

User: Aimee

Room:

Notes:

A red arrow points to the Room button.

7. Add notes in the **Notes** field if needed.

Provider: Adam

Notes: Initial appointment.

Repeat No repeat.

8. If you want this appointment to repeat regularly then click the **Repeat** button (see [Creating a Repeating Appointment](#)⁷³).
9. You can make the appointment an all day appointment by clicking the **All Day** button (it will change to green). The **Time** and **Duration** drop-down lists will be disabled.

New Appointment

Schedule an Appointment

Date: 11/07/2022 **Time:** **Duration:** minutes

Client: Oscar Stokes

Provider: Aimee

Notes:

Repeat No repeat.

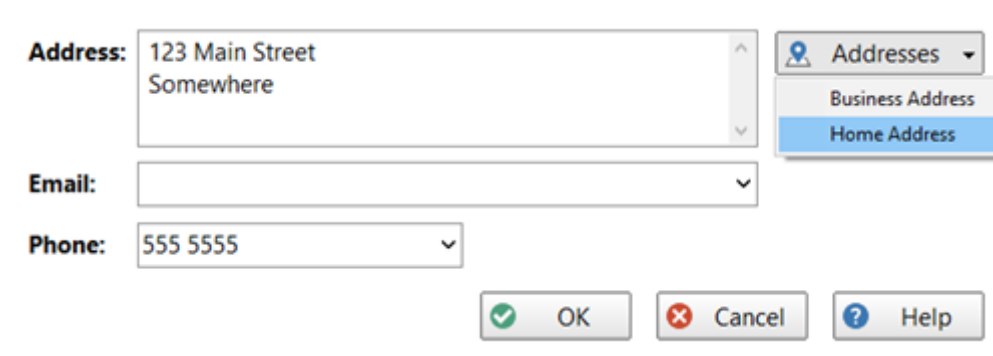
All Day

Address:

Email:

Phone:

10. An address for the client can be typed in, along with an email address and phone number. You can also select their address by clicking the **Addresses** button and selecting either their **Business** or **Home** Address. Their address, phone number and email address will be filled in for you (if they exist in the Address Book).



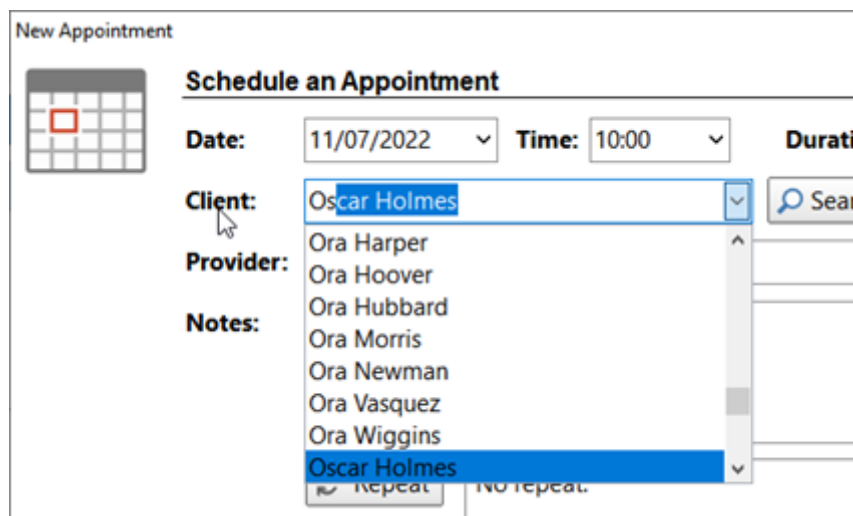
The screenshot shows a form with the following fields and controls:

- Address:** A text input field containing "123 Main Street Somewhere". To its right is a dropdown menu labeled "Addresses" with a location pin icon. The dropdown is open, showing "Business Address" and "Home Address" (highlighted in blue).
- Email:** An empty text input field.
- Phone:** A text input field containing "555 5555".
- Buttons:** At the bottom right, there are three buttons: "OK" (with a green checkmark icon), "Cancel" (with a red X icon), and "Help" (with a blue question mark icon).

11. Click **OK** to finish creating the appointment.

Searching for a Client

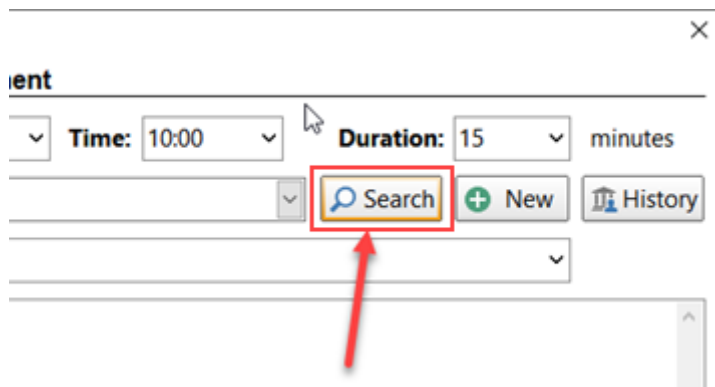
The drop-down list can be used to search for a client. Just start typing in the field and it will do an incremental search.



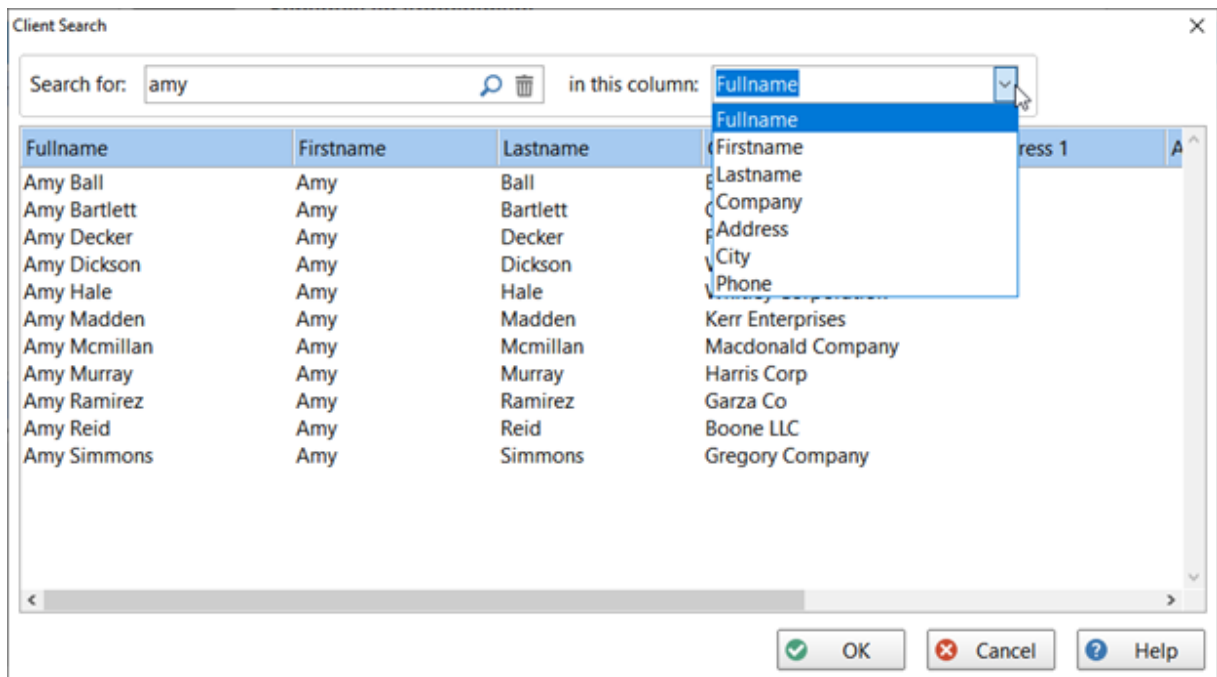
The screenshot shows the "New Appointment" dialog box with the following details:

- Title:** "Schedule an Appointment"
- Date:** "11/07/2022" (dropdown)
- Time:** "10:00" (dropdown)
- Duration:** "Durati" (dropdown)
- Client:** A dropdown menu with "Oscar Holmes" selected. A search icon and "Search" text are visible to the right.
- Provider:** A list of names: Ora Harper, Ora Hoover, Ora Hubbard, Ora Morris, Ora Newman, Ora Vasquez, Ora Wiggins, and Oscar Holmes (highlighted in blue).
- Notes:** A text area.
- Repeat:** A checkbox labeled "repeat" and a radio button labeled "NO repeat".

If you need to search by another field, click the **Search** button.



The **Client Search** screen will be displayed.



To find the client you're after, select the column you want to search. The available columns are:

- Fullname
- Firstname
- Company
- Address
- City
- Phone

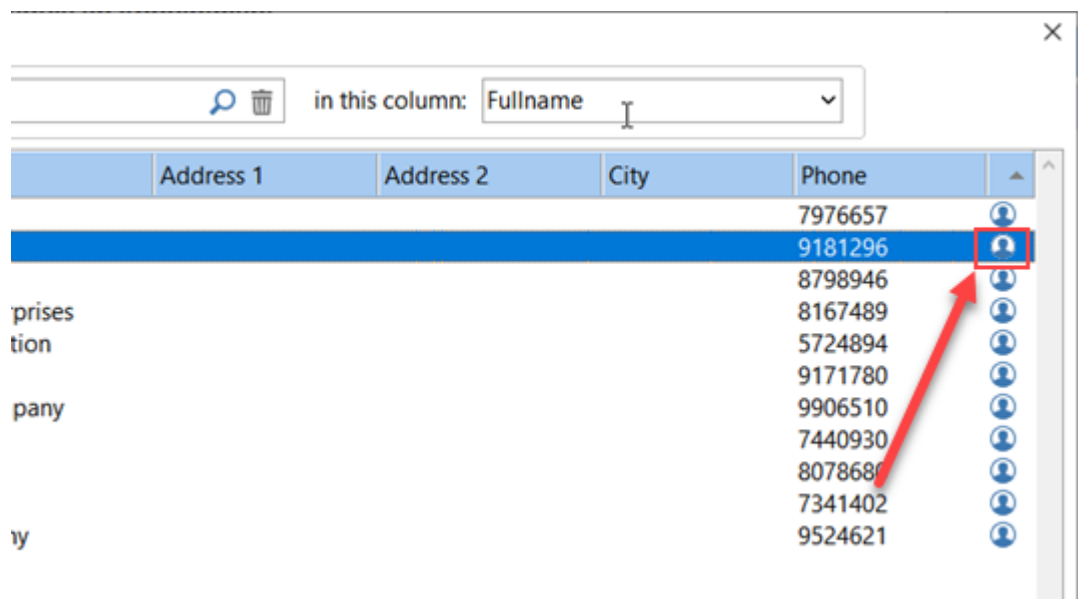
For the Address, City and Phone columns, both business and home fields in the PhonePad Address Book will be searched.

Enter some search text in the **Search for** field and then press <enter> (or click the **Search** button).

When you have found the client you are after, select them from the results list and click the **OK** button.

Displaying Client Details

If you scroll to the right there is a button you can press to show details about the selected client:



The **Client Details** screen will be displayed.

Adding a Client from an Appointment

If the client you're creating an appointment for doesn't exist in the Address Book, you can add it directly from the appointment.

1. Click the **New** button.
2. The **New Client** screen will appear.
3. Enter the details of the new client. The first two fields (**Firstname** and **Lastname**) are mandatory - the rest are optional.
4. Click **OK** to create the new client in the PhonePad Address Book.

New Client

Firstname: Jane Date of Birth: [dropdown]

Lastname: Jones Email: [text box]

Company: [text box] Work Phone: 555 5555

Address 1: [text box] Alt Work Phone: [text box]

Address 2: [text box] Home Phone: [text box]

City: [text box] Cell/Mobile Phone: [text box]

State: [text box] Postal Code: [text box] Identification: Client No, Patient No, etc.

Type: Business Address [dropdown]

Notes 1 Notes 2 Notes 3

[Large text area for notes]

OK Cancel Help

Creating a Repeating Appointment

Some [appointment types](#)⁴⁸ can be set to repeat on a regular basis.

1. You can make an appointment repeat by clicking the **Repeat** button.


[dropdown]

Repeat No repeat.

All Day

2. You have 3 main options: Daily, Weekly or Monthly. And then you have more options within those.

Repeating Appointment ✕

 Start: 16/06/2021 ▾


End: 16/12/2021 ▾

How Often: Daily ▾

Every 1 ▾ day

Every Weekday

Repeating Appointment ✕

 Start: 16/06/2021 ▾

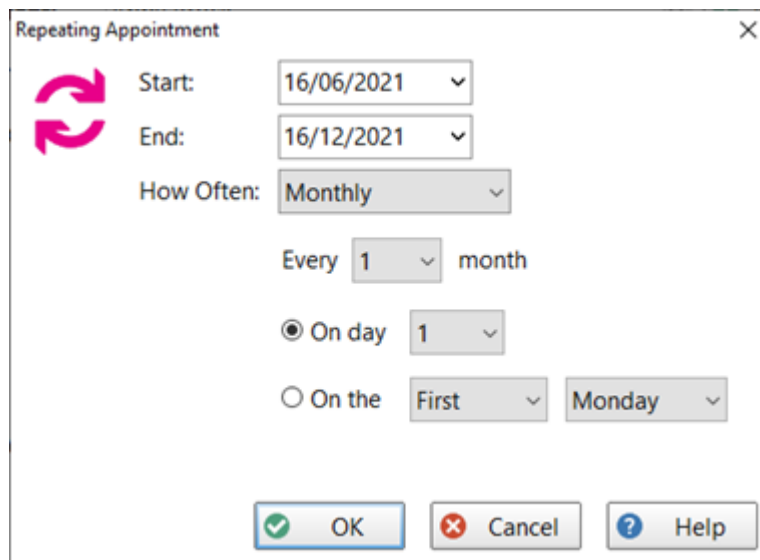
End: 16/12/2021 ▾

How Often: Weekly ▾

Every 1 ▾ week on

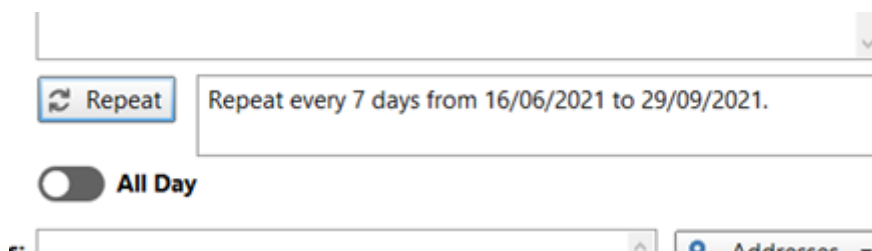
Mon Tue Wed Thu

Fri Sat Sun



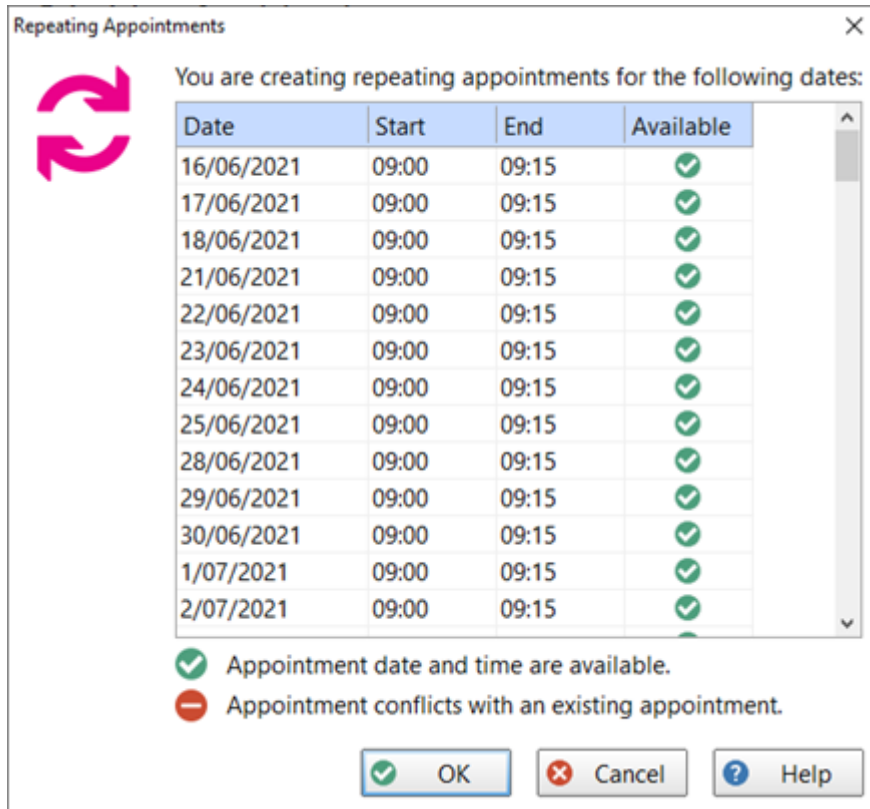
The image shows a 'Repeating Appointment' dialog box. It features a pink circular arrow icon on the left. The fields are: 'Start:' with a date of 16/06/2021, 'End:' with a date of 16/12/2021, and 'How Often:' set to 'Monthly'. Below this, it says 'Every 1 month'. There are two radio button options: 'On day 1' (which is selected) and 'On the First Monday'. At the bottom, there are three buttons: 'OK' with a green checkmark, 'Cancel' with a red X, and 'Help' with a blue question mark.

3. Select a **Start** and **End** Date for the repeating appointment, then select the appropriate options.
4. When you're finished, click the **OK** button.
5. The appointment will show the details of the repeating appointments.

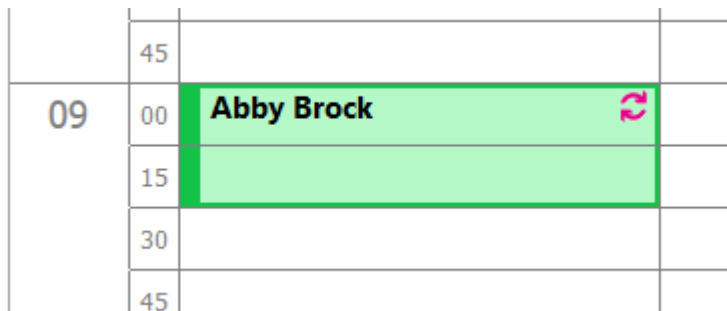


The image shows a portion of an appointment interface. It includes a 'Repeat' button with a circular arrow icon. To its right, a text box displays 'Repeat every 7 days from 16/06/2021 to 29/09/2021.'. Below this is a toggle switch for 'All Day', which is currently turned off. A partial 'Address' field is visible at the bottom right.

6. When you click **OK** to finish creating the appointment, Appointment Calendar will check for any conflicts with existing appointments and display a list of repeating appointments that are about to be created..

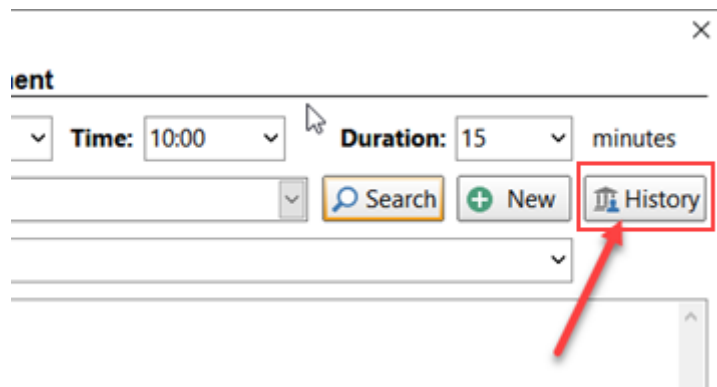


7. Click **OK** to complete the process. If there are any conflicts you won't be able to create the repeating appointments.
8. The repeating appointments will display the Repeating icon.



Client History

You can view a client's appointment history by clicking the **History** button.



A history of all the client's appointments will then be displayed:

Client History for Aaron Fisher

History Date	Date	Start	End	Provider	Status	Use
7/04/2021 9:00 AM	7/04/2021	08:45	09:15	Aimee	No Show	Aim
1/04/2021 8:38 AM	7/04/2021	08:45	09:15	Aimee	Booked	Aim
31/03/2021 9:47 AM	31/03/2021	10:15	10:45	Aimee	Canceled	Aim
16/03/2021 3:17 PM	17/03/2021	08:45	09:15	Aimee	Canceled	Aim
14/03/2021 8:38 AM	31/03/2021	10:15	10:45	Aimee	Booked	Aim
12/03/2021 11:02 AM	17/03/2021	08:45	09:15	Aimee	Booked	Aim
3/03/2021 8:39 AM	3/03/2021	09:30	10:00	Aimee	No Show	Aim
1/03/2021 4:21 PM	3/03/2021	09:30	10:00	Aimee	Booked	Aim
4/02/2021 12:22 PM	17/02/2021	10:00	10:30	Aimee	Booked	Aim
1/02/2021 9:27 AM	3/02/2021	09:15	09:45	Aimee	Booked	Aim
14/01/2021 2:32 PM	20/01/2021	09:00	09:30	Aimee	Booked	Aim
2/01/2021 11:15 AM	6/01/2021	08:30	09:00	Aimee	Booked	Aim

View Close Help

You can view the details of a history entry by selecting it from the list and clicking the View button, or by double-clicking the entry.

View Client History ✕

History Date:

Appointment Date:

Start Time:

End Time:

Provider:

Status:

User:

Adding a Concurrent Appointment

Concurrent Appointments are for situations where you book multiple clients for a provider at the same time.

1. Click in a blank appointment slot in a Provider's column.

PhonePad 5 Appointment Calendar: Steve

File Admin Help

Home Admin Help

📅 👤 👥 🚧 🧴 🔪 ✈️ 📅 👍 📅 📅 📅 📅 📅 📅 📅

← **Wednesday, 16 June 2021**

		Abigail	Adam
08	00		
	15		
	30		
	45		
09	00	Abby Brock ↻	
	15		
	30		
	45		

June 2021

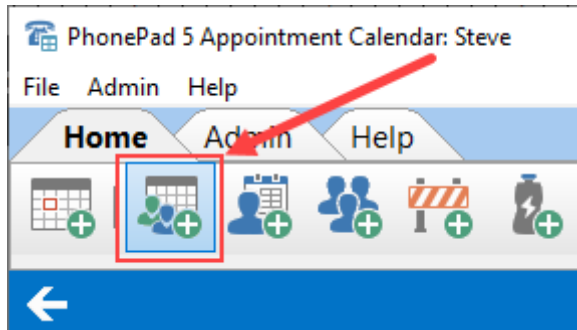
Mo	Tu	We	Th	Fr	Sa	Su
31	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	1	2	3	4
5	6	7	8	9	10	11

Today

Providers

Abigail

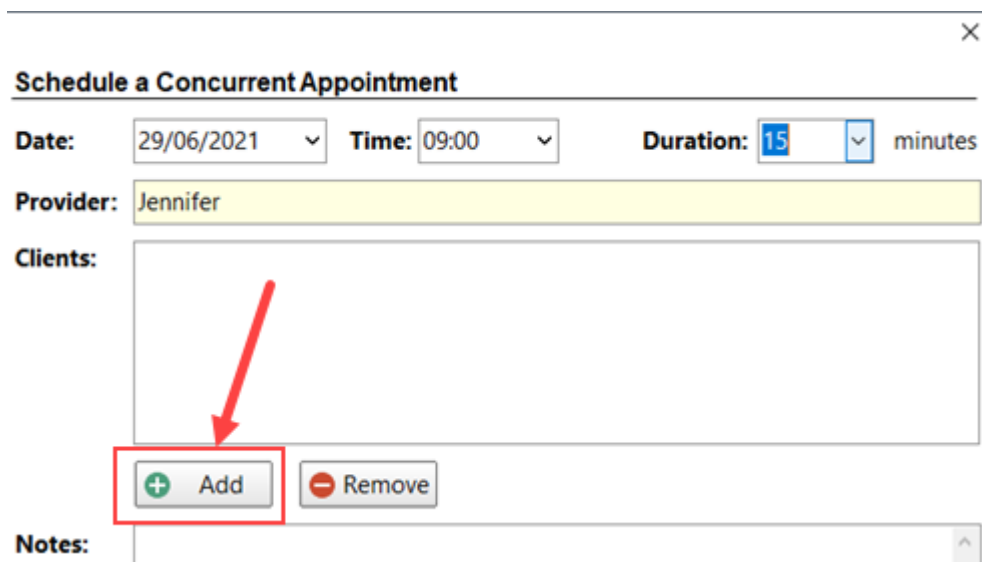
2. Click the **Add Concurrent Appointment** button (or select **New > Concurrent Appointment** from the **File** menu).



3. Select a **Duration** for the appointment.

Date	Time	Duration	Client
29/06/2021	09:00	15	Jennifer

4. Add clients to this appointment by click the **Add** button (see [Selecting Clients](#)⁸¹ for more information).



Schedule a Concurrent Appointment

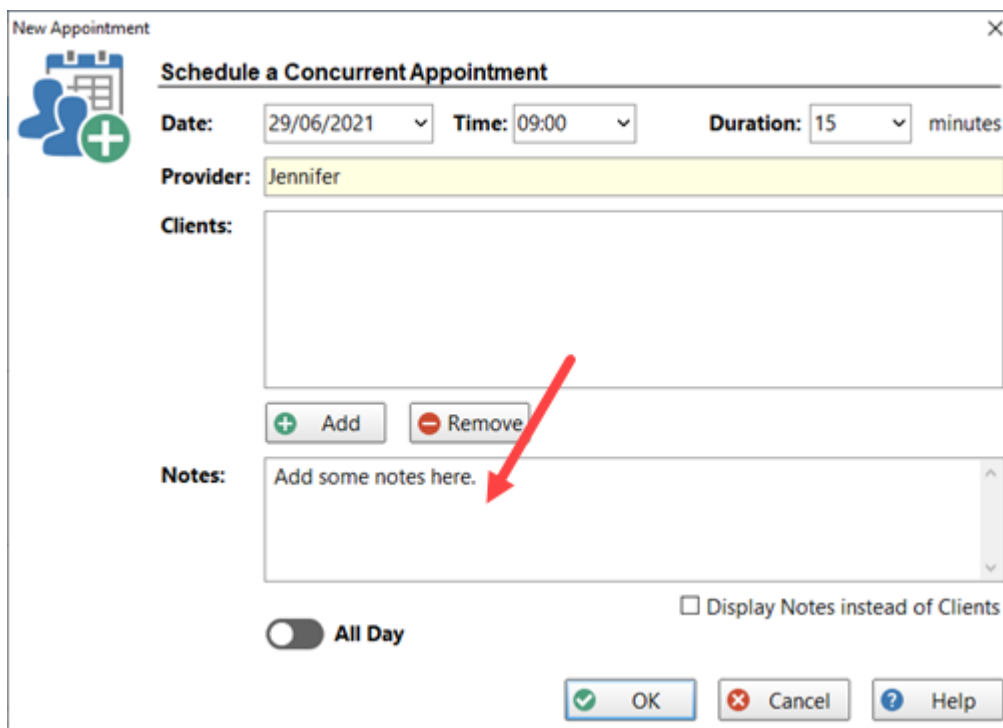
Date: 29/06/2021 **Time:** 09:00 **Duration:** 15 minutes

Provider: Jennifer

Clients:

Notes:

5. Add notes in the **Notes** field if needed.



New Appointment

Schedule a Concurrent Appointment

Date: 29/06/2021 **Time:** 09:00 **Duration:** 15 minutes

Provider: Jennifer

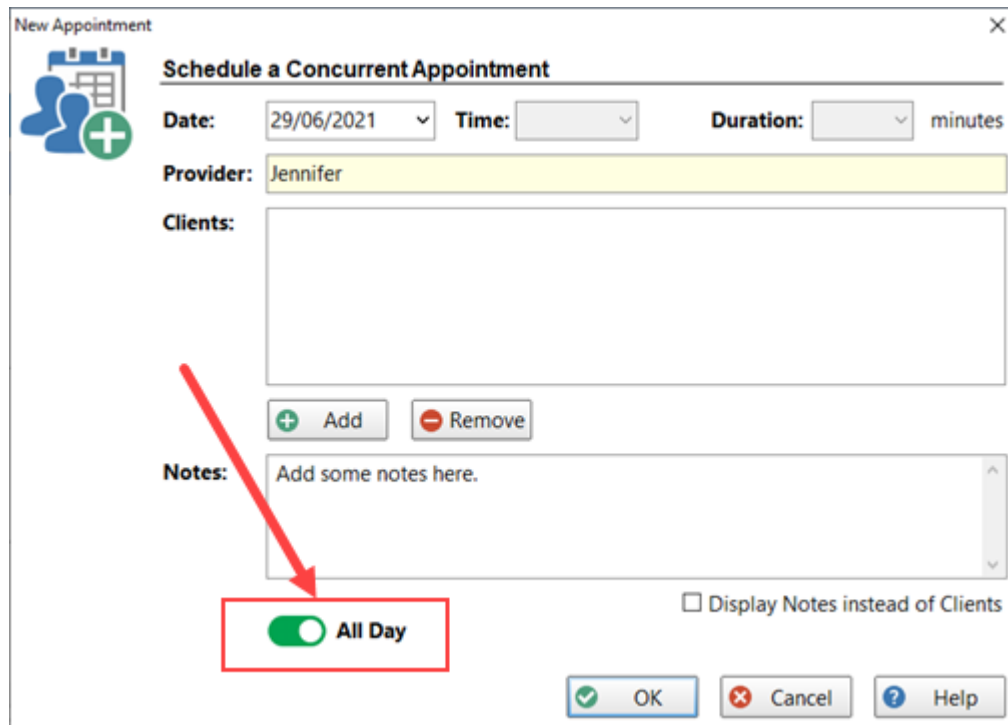
Clients:

Notes: Add some notes here.

Display Notes instead of Clients

All Day

6. You can make the appointment an all day appointment by clicking the **All Day** button (it will change to green). The **Time** and **Duration** drop-down lists will be disabled.



New Appointment

Schedule a Concurrent Appointment

Date: 29/06/2021 Time: [] Duration: [] minutes

Provider: Jennifer

Clients:

+ Add - Remove

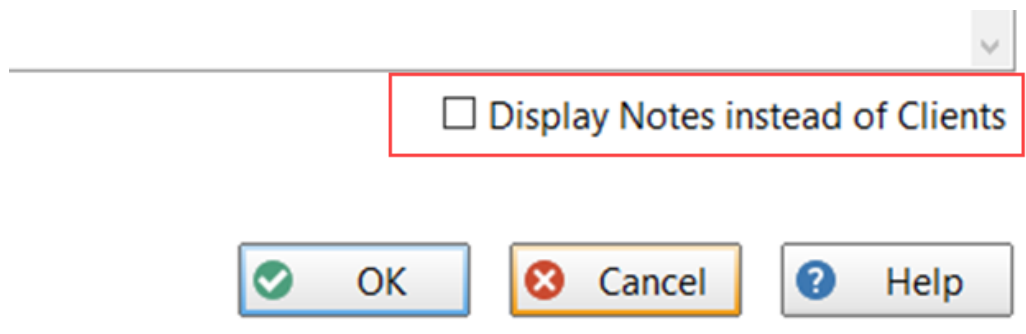
Notes: Add some notes here.

All Day

Display Notes instead of Clients

OK Cancel Help

7. You can have the Notes display in the calendar instead of the clients by checking the **Display Notes instead of Clients** check box.



Display Notes instead of Clients

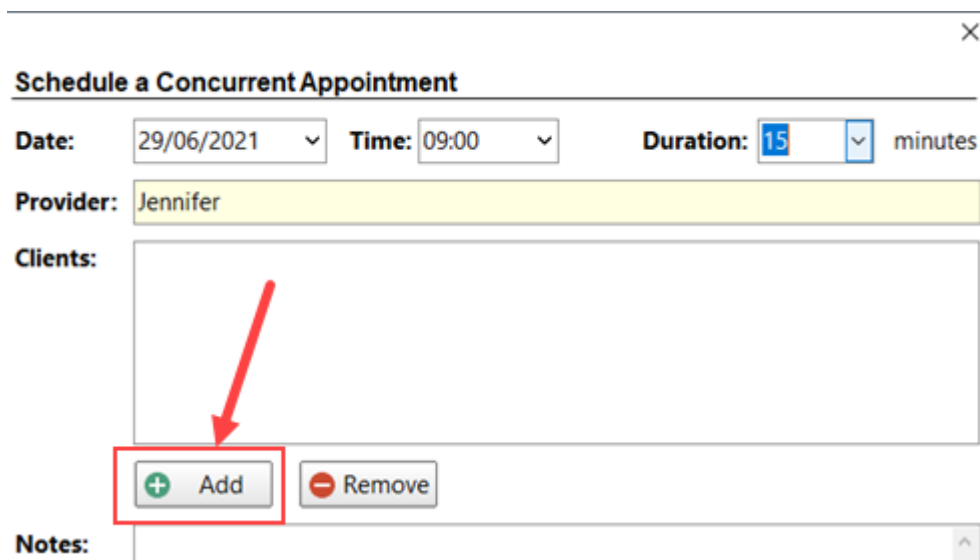
OK Cancel Help

8. Click **OK** to finish creating the appointment.

Selecting Clients

Clients are added to a Concurrent Appointment by following these steps:

1. Click the **Add** button.



Schedule a Concurrent Appointment

Date: 29/06/2021 Time: 09:00 Duration: 15 minutes

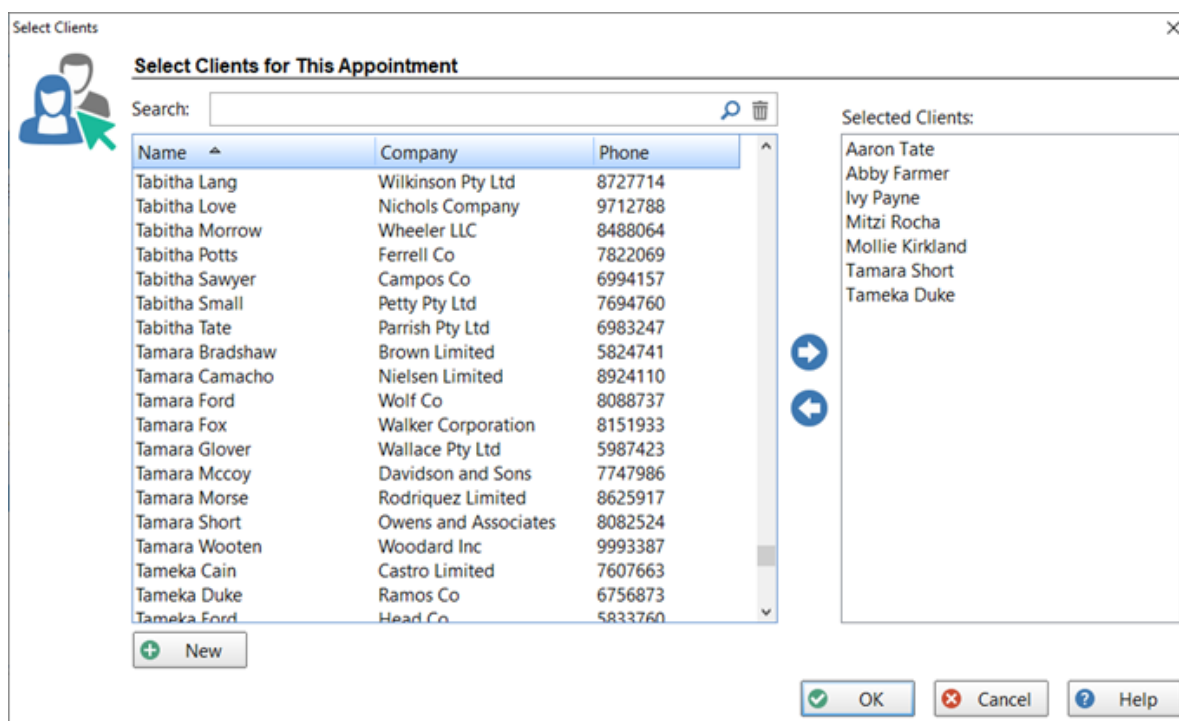
Provider: Jennifer

Clients:

+ Add - Remove

Notes:

2. The **Select Clients for This Appointment** screen will be displayed.



Select Clients

Select Clients for This Appointment

Search:

Name	Company	Phone
Tabitha Lang	Wilkinson Pty Ltd	8727714
Tabitha Love	Nichols Company	9712788
Tabitha Morrow	Wheeler LLC	8488064
Tabitha Potts	Ferrell Co	7822069
Tabitha Sawyer	Campos Co	6994157
Tabitha Small	Petty Pty Ltd	7694760
Tabitha Tate	Parrish Pty Ltd	6983247
Tamara Bradshaw	Brown Limited	5824741
Tamara Camacho	Nielsen Limited	8924110
Tamara Ford	Wolf Co	8088737
Tamara Fox	Walker Corporation	8151933
Tamara Glover	Wallace Pty Ltd	5987423
Tamara Mccoy	Davidson and Sons	7747986
Tamara Morse	Rodriquez Limited	8625917
Tamara Short	Owens and Associates	8082524
Tamara Wooten	Woodard Inc	9993387
Tameka Cain	Castro Limited	7607663
Tameka Duke	Ramos Co	6756873
Tameka Ford	Head Co	5833760

+ New

Selected Clients:

Aaron Tate
Abby Farmer
Ivy Payne
Mitzi Rocha
Mollie Kirkland
Tamara Short
Tameka Duke

OK Cancel Help

3. To add a client to the appointment, select their name from the list on the left and click the right arrow button, or double-click on their name.

Search:

Name ^	Company	Phone
Keith Mcdowell	Bowers Company	6215459
Keith Parks	Alvarado LLC	7201671
Keith Santana	Webster and Sons	6043157
Keith Sosa	Cooley and Sons	6915012
Keith Warner	Bridges Limited	6746694
Kelley Eaton	Wiggins LLC	8299388
Kelley Ewing	Moss Inc	6117426
Kelley Flowers	Carter LLC	6027404
Kelley Greene	Gould Limited	8364128
Kelley Hubbard	Nielsen Corp	5831008
Kelley Rutledge	Fitzgerald Enterprises	6387442
Kelley Salas	Cain Corporation	5926394
Kelli Benson	Odonnell LLC	9443510
Kelli Mullen	England and Associates	8389045

Selected Clients:

- Aaron Tate
- Abby Farmer
- Ivy Payne
- Mitzi Rocha
- Mollie Kirkland
- Tamara Short
- Tameka Duke

Navigation buttons: [Right Arrow] [Left Arrow]

4. To remove a client you just do the process in reverse. Select the name from the list on the right and click the left arrow button, or double-click on their name.

Selected Clients:

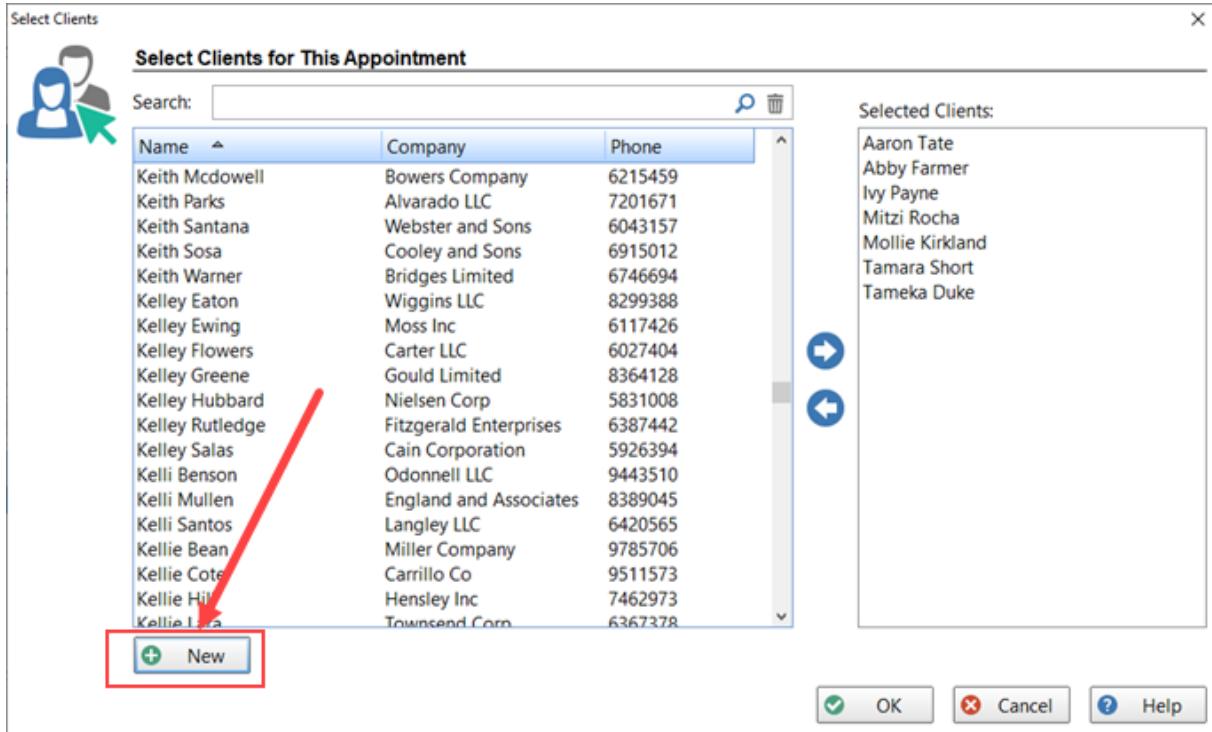
- Aaron Tate
- Abby Farmer
- Ivy Payne
- Mitzi Rocha
- Mollie Kirkland
- Tamara Short
- Tameka Duke

Navigation buttons: [Right Arrow] [Left Arrow]

5. Click **OK** to finish adding clients.

Adding a New Client

If a client doesn't exist in the list, you can add them by clicking the **New** button (see [Adding a Client from an Appointment](#)⁷²).



Searching for a Client

Use the Search option to find a client quickly. Enter their name or partial name in the Search field (1) and click the Search button (2).

To cancel the search, click the Cancel button (3).

Select Clients

Select Clients for This Appointment 3

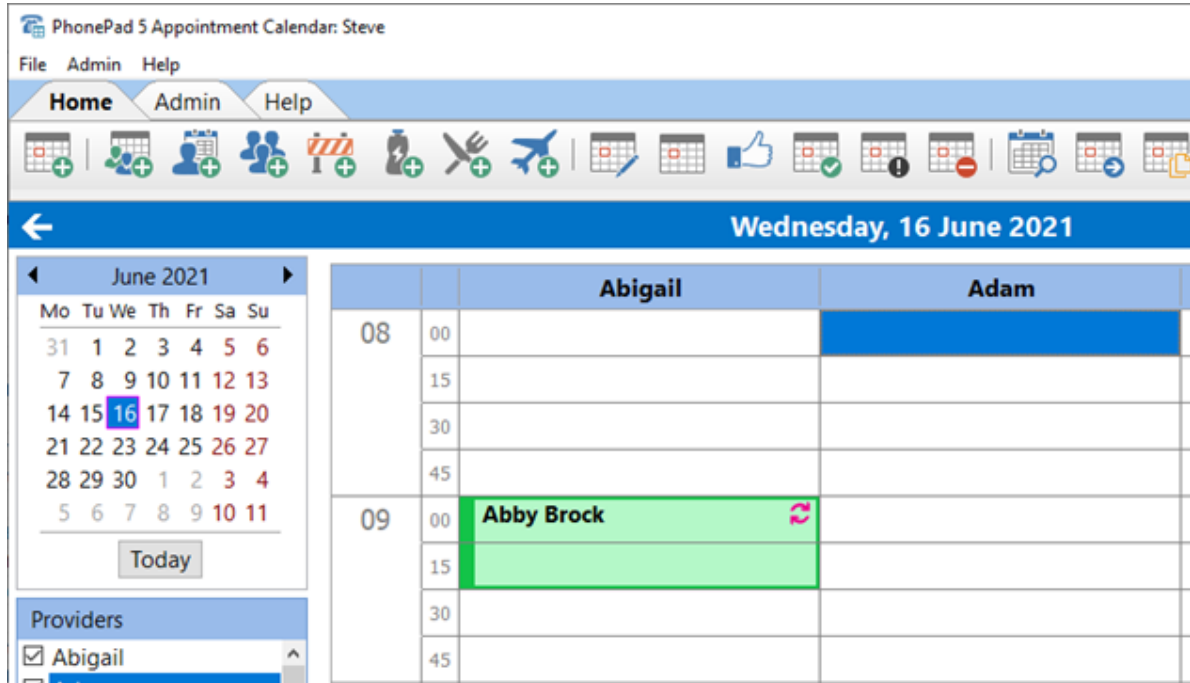
Search: 1 2  

Name ^	Company	Phone
Abby Mcdowell	Rich Corporation	9285957
Brett Mcdowell	Beasley Pty Ltd	8207194
Bruce Mcdowell	Sargent Co	9493541
Clarissa Mcdowell	Eaton Company	7089588
Corrine Mcdowell	Manning and Sons	5832418
Daniel Downs	Hickman Corporation	6091141
Darla Mcdowell	Bryant Enterprises	9553999
Dustin Meadows	Chaney LLC	8638209
Elma Downs	Franks LLC	5581574
Felicia Mcdowell	Hudson Limited	7235919
Franklin Meadows	Carver Corp	6368788
Gay Meadows	Sherman Corp	7651780

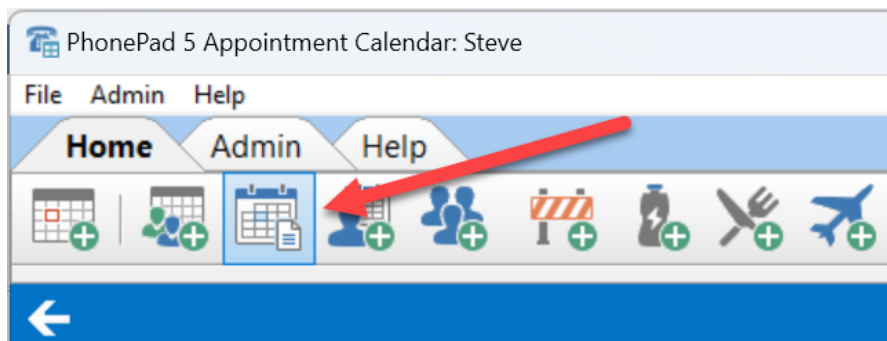
Adding a Miscellaneous Appointment

Miscellaneous Appointments are for situations where the other appointment types aren't suitable.

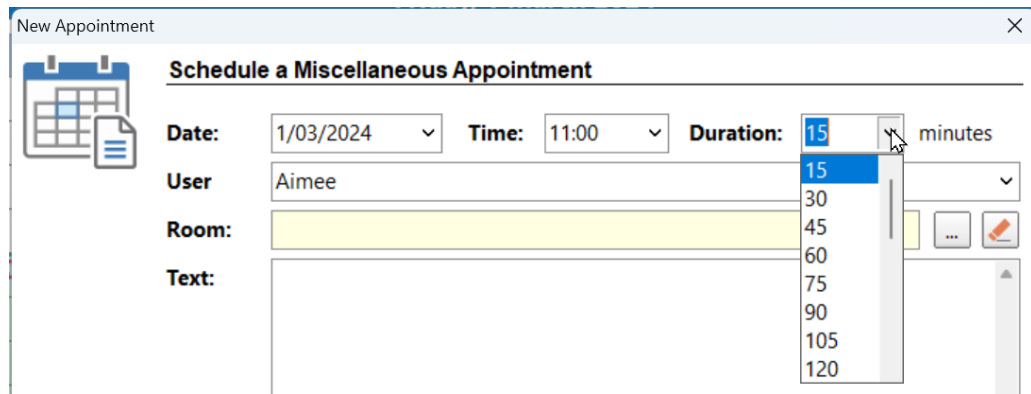
1. Click in a blank appointment slot in a Provider's column.



2. Click the **Add Miscellaneous Appointment** button (or select **New > Miscellaneous Appointment** from the **File** menu).

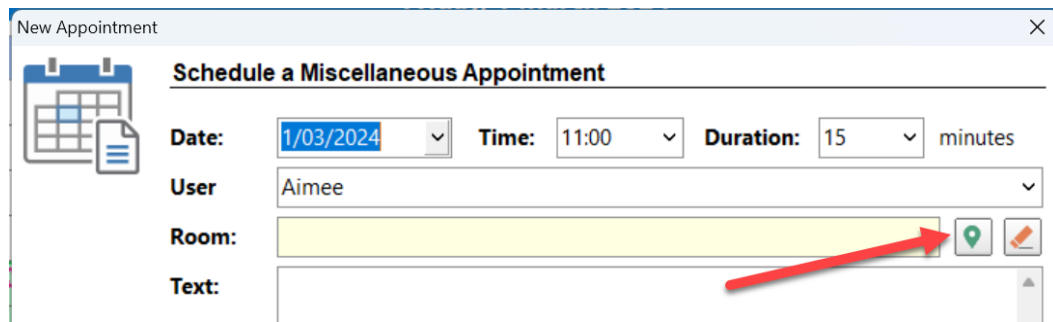


3. Select a **Duration** for the appointment.



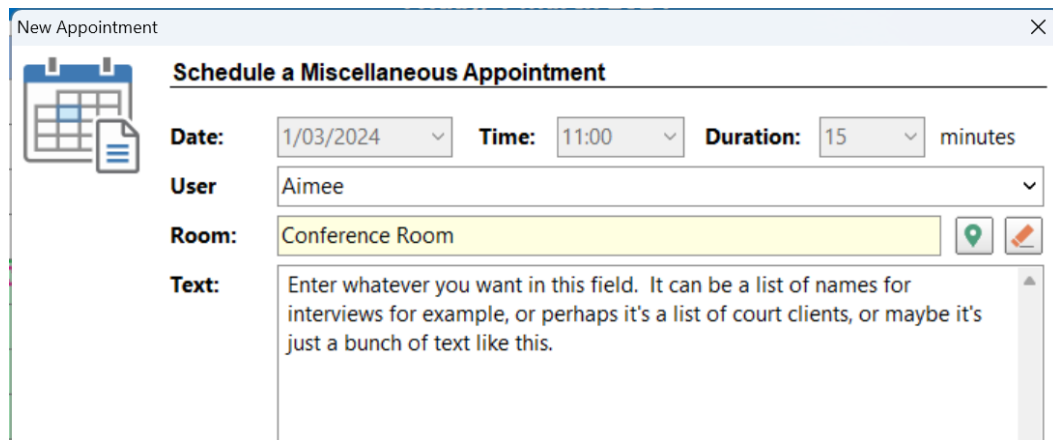
The screenshot shows a 'New Appointment' dialog box titled 'Schedule a Miscellaneous Appointment'. The fields are: Date: 1/03/2024, Time: 11:00, Duration: 15 minutes (dropdown menu is open showing options 15, 30, 45, 60, 75, 90, 105, 120), User: Aimee, Room: (empty), and Text: (empty). A red arrow points to the '15' option in the duration dropdown.

4. Select a room if required.



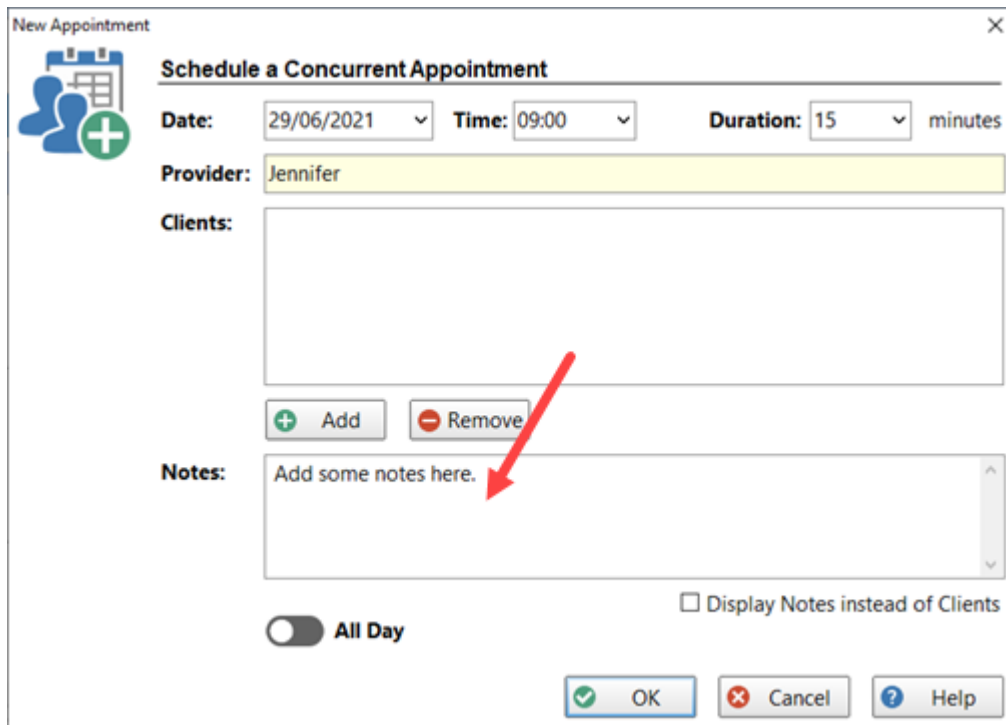
The screenshot shows the 'New Appointment' dialog box with the 'Room' field highlighted in yellow. A red arrow points to the right side of the 'Room' field, indicating the location of the location selection icon.

5. Enter whatever you want in the Text field.



The screenshot shows the 'New Appointment' dialog box with the 'Room' field set to 'Conference Room' and the 'Text' field containing the text: 'Enter whatever you want in this field. It can be a list of names for interviews for example, or perhaps it's a list of court clients, or maybe it's just a bunch of text like this.'

6. Add notes in the **Notes** field if needed.



New Appointment

Schedule a Concurrent Appointment

Date: 29/06/2021 Time: 09:00 Duration: 15 minutes

Provider: Jennifer

Clients:

+ Add - Remove

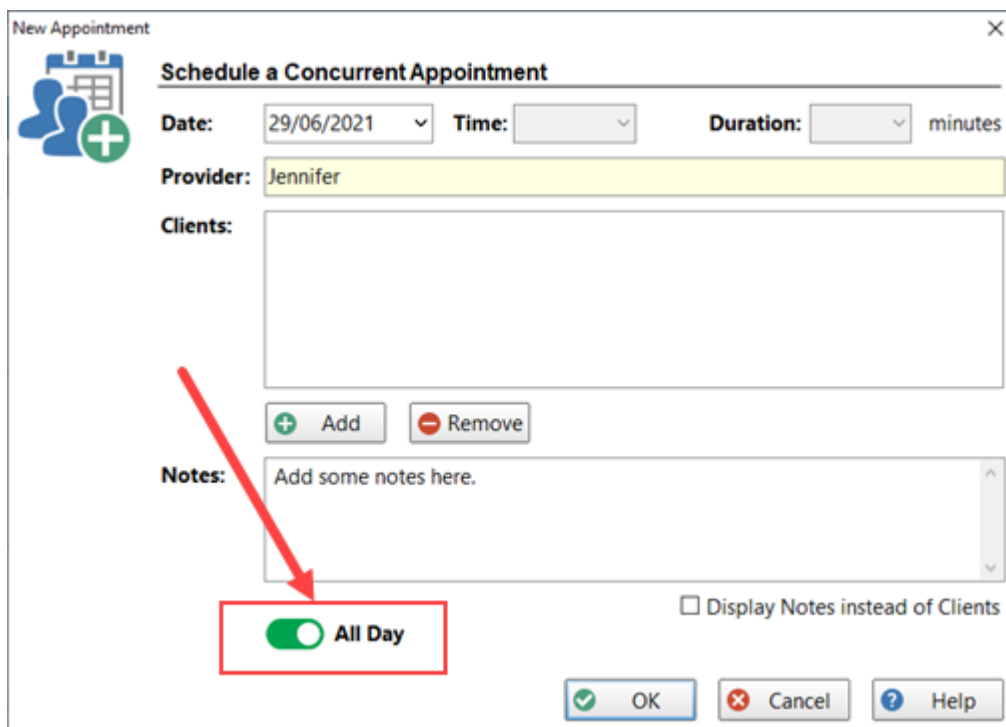
Notes: Add some notes here.

Display Notes instead of Clients

All Day

OK Cancel Help

7. You can make the appointment an all day appointment by clicking the **All Day** button (it will change to green). The **Time** and **Duration** drop-down lists will be disabled.



New Appointment

Schedule a Concurrent Appointment

Date: 29/06/2021 Time: [disabled] Duration: [disabled] minutes

Provider: Jennifer

Clients:

+ Add - Remove

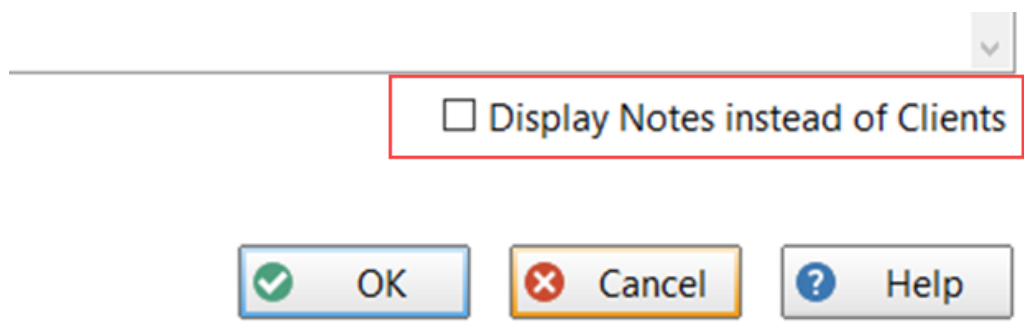
Notes: Add some notes here.

Display Notes instead of Clients

All Day

OK Cancel Help

7. You can have the Notes display in the calendar instead of the clients by checking the **Display Notes instead of Clients** check box.

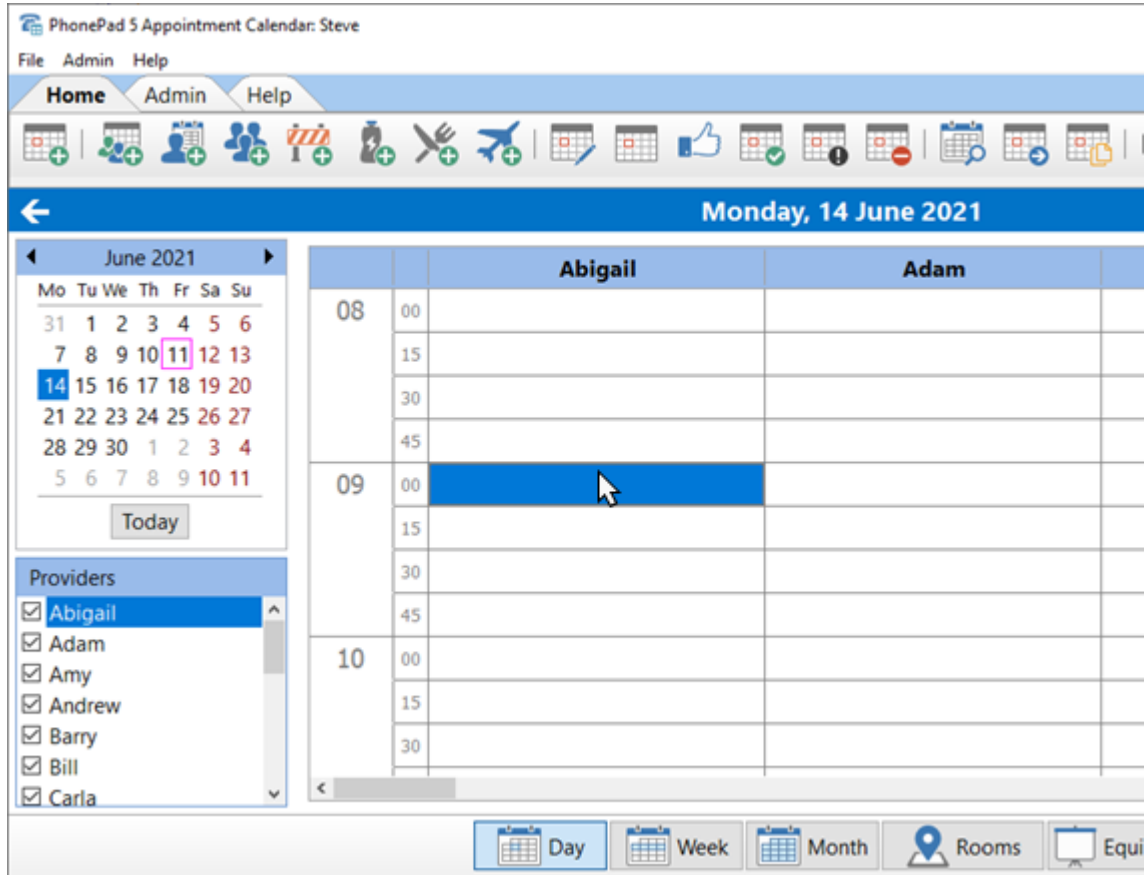


8. Click **OK** to finish creating the appointment.

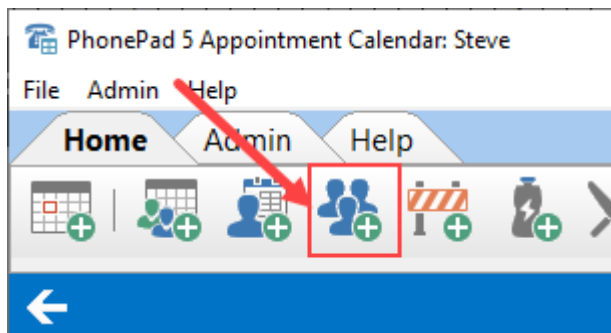
Adding a Meeting

We'll cover adding a meeting here, but adding other [appointment types](#)⁴⁸ is very similar.

1. Click in a blank appointment slot in a Provider's column.



2. Click the **Add Meeting** button (or select **New > Meeting** from the **File** menu).



3. Select a **Duration** for the meeting.

Schedule a Meeting

Date: 29/06/2021 ▾ **Time:** 08:00 ▾ **Duration:** 15 ▾

Subject:

Participants:

Select Participants and Resources...

15
30
45
60
75
90
105
120

4. Enter a **Subject** for the meeting.

Schedule a Meeting

Date: 29/06/2021 ▾ **Time:** 08:00 ▾ **Duration:**

Subject: Team Meeting

Participants:

Select Participants and Resources...

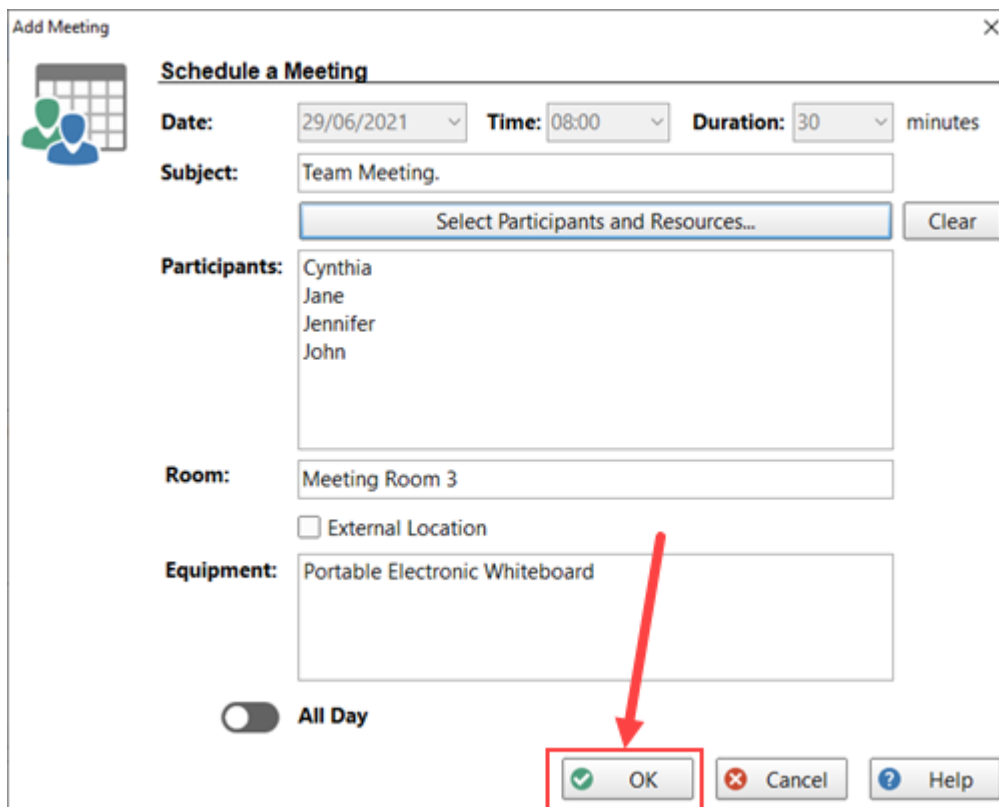
5. Add **Participants** and **Resources** for the meeting by clicking on the **Select Participants and Resources** button (see [Selecting Meeting Resources](#)⁹²).
6. The **Date**, **Time** and **Duration** fields will be disabled once you have selected resources.
7. Check the **External Location** if the meeting is outside of the office.

Room:

External Location

Equipment: Portable Electronic Whiteboard

8. You can make the appointment an all day appointment by clicking the **All Day** button (it will change to green).



The screenshot shows the 'Add Meeting' dialog box with the following fields and controls:

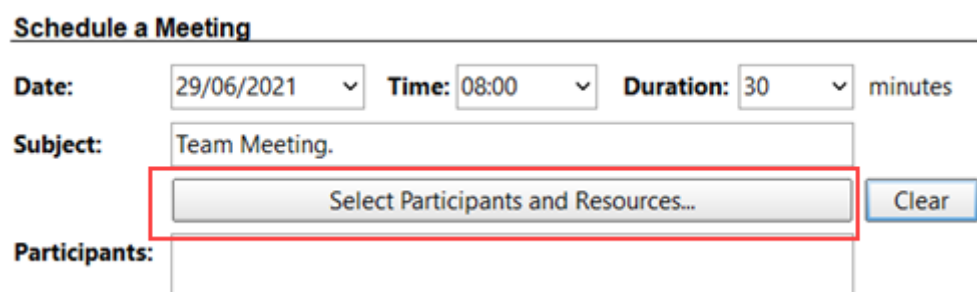
- Date:** 29/06/2021
- Time:** 08:00
- Duration:** 30 minutes
- Subject:** Team Meeting.
- Participants:** Cynthia, Jane, Jennifer, John
- Room:** Meeting Room 3
- Equipment:** Portable Electronic Whiteboard
- All Day:**
- Buttons:** OK (highlighted with a red box and arrow), Cancel, Help

10. Click **OK** to finish creating the appointment.

Selecting Meeting Resources

Providers and Resources are added to a Meeting by following these steps:

1. Click the **Select Participants and Resources** button.



The screenshot shows the 'Schedule a Meeting' dialog box with the following fields and controls:

- Date:** 29/06/2021
- Time:** 08:00
- Duration:** 30 minutes
- Subject:** Team Meeting.
- Buttons:** Select Participants and Resources... (highlighted with a red box), Clear

2. The following screen will be displayed.

Select Meeting Participants and Resources

Date: Tuesday, 29 June 2021 **Time:** 08:00 **Duration:** 30 minutes

Participants

Provider	08:00	08:15	08:30	08:45	09:00	09:15	09:30	09:45	10:00
<input type="checkbox"/> Admin	Available	Available	Available	Available	Available	Available	Available	Available	Available
<input type="checkbox"/> Aimee	Available	Available	Available	Available	Not Available	Available	Available	Available	Available
<input type="checkbox"/> Bill	Available	Available	Available	Available	Available	Available	Available	Available	Available
<input type="checkbox"/> Cynthia	Available	Available	Available	Available	Available	Available	Available	Available	Available
<input type="checkbox"/> Jane	Available	Available	Available	Available	Available	Available	Available	Available	Available
<input type="checkbox"/> Jennifer	Available	Available	Available	Available	Available	Available	Available	Available	Available
<input type="checkbox"/> John	Available	Available	Available	Available	Available	Available	Available	Available	Available

Rooms

Room	08:00	08:15	08:30	08:45	09:00	09:15	09:30	09:45	10:00
<input type="checkbox"/> Meeting Room 1	Available	Available	Available	Available	Available	Available	Available	Available	Available
<input type="checkbox"/> Meeting Room 2	Available	Available	Available	Available	Available	Available	Available	Available	Available
<input type="checkbox"/> Meeting Room 3	Available	Available	Available	Available	Available	Available	Available	Available	Available
<input type="checkbox"/> Conference Room	Available	Available	Available	Available	Available	Available	Available	Available	Available

Equipment

Resource	08:00	08:15	08:30	08:45	09:00	09:15	09:30	09:45	10:00
<input type="checkbox"/> Overhead Projector	Available	Available	Available	Available	Available	Available	Available	Available	Available
<input type="checkbox"/> Portable Electronic W...	Available	Available	Available	Available	Available	Available	Available	Available	Available
<input type="checkbox"/> Projection Screen	Available	Available	Available	Available	Available	Available	Available	Available	Available

■ Available
 ■ Current Appointment
 ■ Not Available
 ■ Non-Work Hours

3. This screen allows you to see which appointment slots are available for **Participants**, **Rooms** and **Equipment**.
4. The time you selected for the meeting is shown in orange. If the participants and/or resources aren't available at that time, you can scroll across to find a time when they're all available.
5. Unavailable times are shown in pink.
6. Check the check box next to the **Participant**, **Room** or **Equipment** that you want included in the meeting.
7. Click **OK** to finish selecting.

If you need to edit the **Participants, Room** or **Equipment**, just click the **Select Participants and Resources** button again.

The **Clear** button will clear your selections.

Updating an Appointment

If you need to update an appointment, eg. change the time or duration, select the appointment from the calendar and click the **Edit Appointment** button. Or double-click on the appointment.



Repeating Appointments

Some [Appointment Types](#)⁴⁸ can be set to repeat.

To repeat an appointment;

1. Click on the **Repeat** button.

New Appointment [X]

Schedule an Appointment

Date: 29/06/2021 **Time:** 10:00 **Duration:** 15 minutes

Client: Staci Sheppard [New] [History]

Provider: Cynthia

Notes:

Repeat No repeat.

All Day

Address: [Addresses]


Email:

Phone:

[OK] [Cancel] [Help]

2. You have the option of repeating **Daily, Weekly** or **Monthly**.

Repeating Appointment [X]

 **Start:** 16/06/2021

End: 16/12/2021

How Often: Daily

Every 1 day

Every Weekday

[OK] [Cancel] [Help]

The image displays two screenshots of the 'Repeating Appointment' dialog box. Both screenshots show the 'Start' date as 16/06/2021 and the 'End' date as 16/12/2021. The top screenshot shows the 'How Often' dropdown set to 'Weekly', with 'Every 1 week on' and checkboxes for days of the week (Mon, Tue, Wed, Thu, Fri, Sat, Sun). The bottom screenshot shows the 'How Often' dropdown set to 'Monthly', with 'Every 1 month' and radio buttons for 'On day 1' (selected) and 'On the First Monday'.

3. When you have made your selection click **OK**.
4. The option you selected will be shown on the appointment's screen.

New Appointment ×

Schedule an Appointment

Date: 29/06/2021 **Time:** 10:00 **Duration:** 15 minutes

Client: Staci Sheppard + New History

Provider: Cynthia

Notes:

Repeat Repeat every 2 weeks on Tuesday from 29/06/2021 to 29/06/2022.

All Day

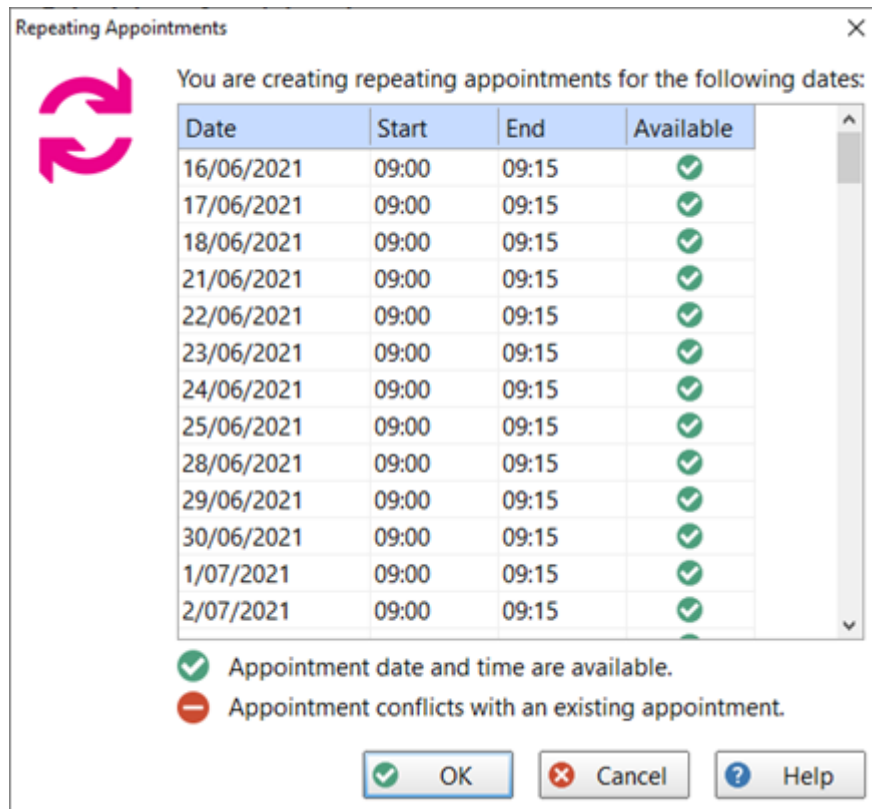
Address: Addresses

Email:

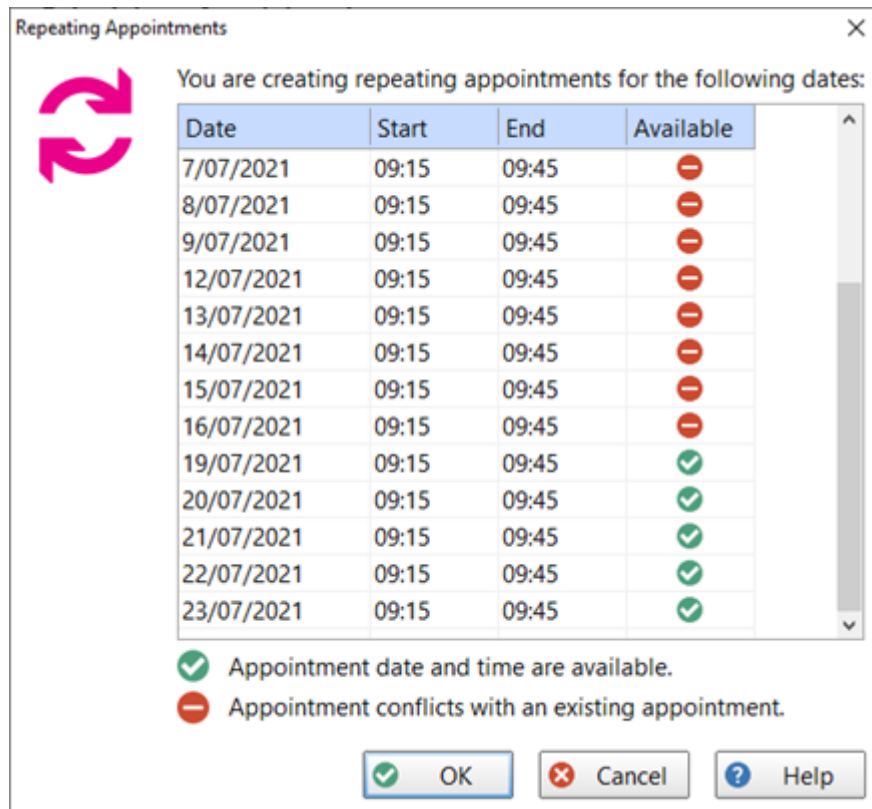
Phone:

OK Cancel Help

5. Click **OK** to continue creating the appointment.
6. A summary of the repeating appointments you are about create will be displayed.



7. If there are any conflicts with existing appointments they will be shown. In that situation you won't be able to finish creating the appointments.



8. If there are no conflicts then click **OK** to complete the creation of the repeating appointments.

Viewing an Appointment

You can view an appointment by following these steps:

1. Select the appointment.
2. Click the **View Appointment** button on the **Home** toolbar.



3. The appointment will be displayed in read-only mode (no details can be changed).

View Appointment

Schedule an Appointment

Date: 28/06/2021 **Time:** 09:30 **Duration:** 45 minutes

Client: Louisa Petersen New History

Provider: Abigail

Notes:

Repeat No repeat.

All Day

Address:

Email:

Phone:

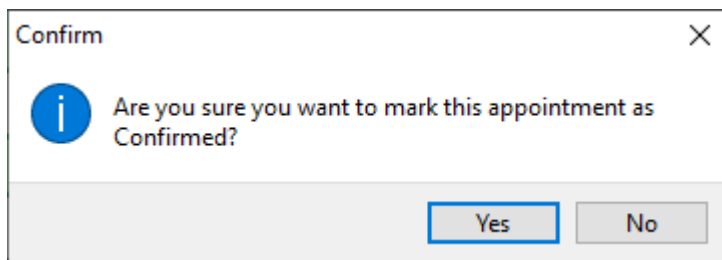
Confirming an Appointment

Appointments can be confirmed with a couple of clicks:

1. Select the appointment from the list.
2. Click the **Confirmed** button on the **Home** toolbar.



3. You will be asked to confirm this.



4. A icon will appear on the appointment showing that the appointment is confirmed. This will also be recorded in the client's history.



No Shows

If a client doesn't turn up to an appointment you can mark them as a "No Show".

1. Select the appointment from the list.
2. Click the **No Show** button on the **Home** toolbar.



3. You will be asked to confirm the No Show.
4. A icon will appear on the appointment showing that they didn't turn up. This will also be recorded in the client's history.



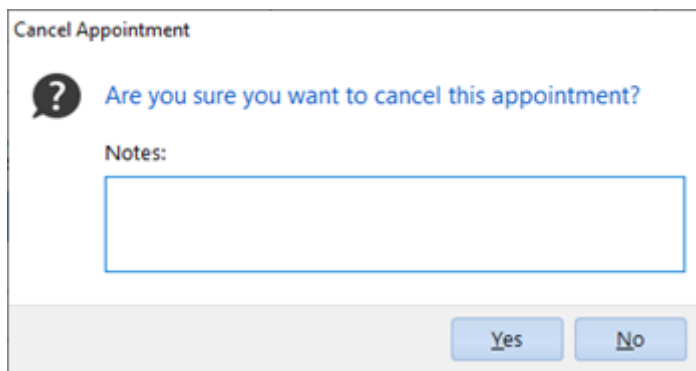
Canceling an Appointment

If an appointment needs to be canceled, follow these steps:

1. Select the appointment from the list.
2. Click the **Cancel** button on the **Home** toolbar.



3. You will be prompted to confirm the cancellation. You may need to enter a note if your Administrator has set this up as a requirement.

A screenshot of a dialog box titled "Cancel Appointment". It contains a question mark icon and the text "Are you sure you want to cancel this appointment?". Below this is a "Notes:" label followed by a large empty text input field. At the bottom right, there are two buttons labeled "Yes" and "No".

4. The appointment will be removed from the calendar, freeing it up for another appointment. The cancellation will be logged in the [Appointment History](#)¹²³.

Looking for the Next Available Appointment

Finding the next available appointment for a client is quite simple with Appointment Calendar.

1. Select a Provider.
2. Click the **Find Next Available Appointment** button on the **Home** toolbar.



- The **Find Next Available Appointment** screen will be displayed, with the selected Provider already highlighted.

Find Next Available Appointment

From Date: 7/04/2021 To Date: 21/04/2021 Duration: 15 minutes Search

Providers	Available Appointments						
	7/04/2021	8/04/2021	9/04/2021	10/04/2021	11/04/2021	12/04/2021	13/04/2021
Admin							
Aimee	08:00	08:00	08:00	08:00	08:00	08:00	08:00
Bill	08:15	08:15	08:15	08:15	08:15	08:15	08:15
Cynthia	08:30	08:30	08:30	08:30	08:30	08:30	08:30
Jane	08:45	08:45	08:45	08:45	08:45	08:45	08:45
Jennifer	09:00	09:00	09:00	09:00	09:00	09:00	09:00
John	09:15	09:15	09:15	09:15	09:15	09:15	09:15
John Smith	09:30	09:30	09:30	09:30	09:30	09:30	09:30
Pete	09:45	09:45	09:45	09:45	09:45	09:45	09:45
Ryan	10:00	10:00	10:00	10:00	10:00	10:00	10:00
Samantha	10:15	10:15	10:15	10:15	10:15	10:15	10:15
Steve	10:30	10:30	10:30	10:30	10:30	10:30	10:30
Tony	10:45	10:45	10:45	10:45	10:45	10:45	10:45
	11:00	11:00	11:00	11:00	11:00	11:00	11:00
	11:15	11:15	11:15	11:15	11:15	11:15	11:15
	11:30	11:30	11:30	11:30	11:30	11:30	11:30
	11:45	11:45	11:45	11:45	11:45	11:45	11:45
	12:00	12:00	12:00	12:00	12:00	12:00	12:00
	12:15	12:15	12:15	12:15	12:15	12:15	12:15
	12:30	12:30	12:30	12:30	12:30	12:30	12:30

■ Available
 ■ Not Available
 ■ Non-Work Hours

OK Cancel Help

- The green spaces indicate available times, whereas the pink spaces indicated unavailable times.
- In this example, Aimee is the selected provider and we can see that she has quite a few spaces available on the 7th, but is almost completely booked out on the following day.
- You can click on the available times, but not the unavailable times.
- You can book an appointment time by selecting it and click the **OK** button.
- The **New Appointment** screen will then open with the information pre-filled.

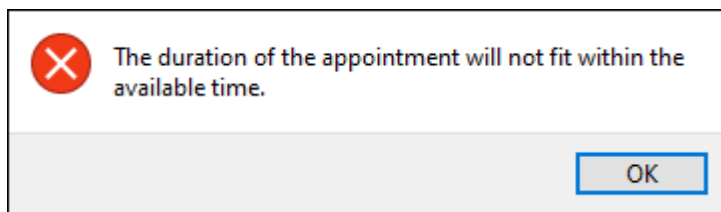
From Date Use the From Date and To Date to set a range for your search for available **To Date** appointments.

Duration This is the duration of the appointment you want to add. Set this when searching for appointments.

Providers Check available appointments by selecting a Provider from the list.

Search Click the Search button whenever you change the date range or Provider.

Keep in mind the **Duration** of the appointment. If you try to book a one hour appointment where there is only 30 minutes available, a message will be displayed.



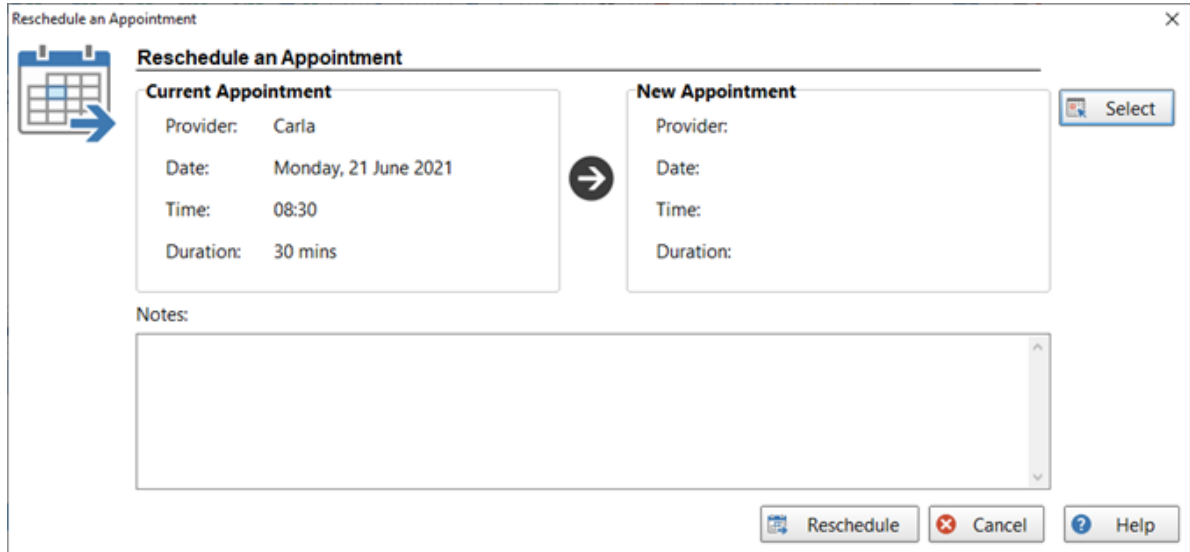
Rescheduling an Appointment

Rescheduling an appointment is quite simple:

1. Select the appointment.
2. Click the **Reschedule Appointment** button on the **Home** toolbar.



3. The **Reschedule Appointment** screen will appear, showing the current appointment on the left side.



Reschedule an Appointment

Reschedule an Appointment

Current Appointment

Provider: Carla

Date: Monday, 21 June 2021

Time: 08:30

Duration: 30 mins

New Appointment

Provider:

Date:

Time:

Duration:

Select

Notes:

Reschedule Cancel Help

4. Click the **Select** button to select a new date and/or time.



5. The **Find Next Available Appointment** screen will be displayed.

Find Next Available Appointment

From Date: 21/06/2021 To Date: 5/07/2021 Duration: 30 minutes Search

Providers	Available Appointments						
	21/06/2021	22/06/2021	23/06/2021	24/06/2021	25/06/2021	26/06/2021	27/06/2021
Abigail	10:30	10:30	10:30	10:30	10:30	10:30	10:30
Adam	10:45	10:45	10:45	10:45	10:45	10:45	10:45
Admin	11:00	11:00	11:00	11:00	11:00	11:00	11:00
Amy	11:15	11:15	11:15	11:15	11:15	11:15	11:15
Andrew	11:30	11:30	11:30	11:30	11:30	11:30	11:30
Barry	11:45	11:45	11:45	11:45	11:45	11:45	11:45
Bill	12:00	12:00	12:00	12:00	12:00	12:00	12:00
Carla	12:15	12:15	12:15	12:15	12:15	12:15	12:15
David	12:30	12:30	12:30	12:30	12:30	12:30	12:30
Frank	12:45	12:45	12:45	12:45	12:45	12:45	12:45
Fred	13:00	13:00	13:00	13:00	13:00	13:00	13:00
Jane	13:15	13:15	13:15	13:15	13:15	13:15	13:15
Mark	13:30	13:30	13:30	13:30	13:30	13:30	13:30
Oscar	13:45	13:45	13:45	13:45	13:45	13:45	13:45
Peter	14:00	14:00	14:00	14:00	14:00	14:00	14:00
Rachel	14:15	14:15	14:15	14:15	14:15	14:15	14:15
Rikke	14:30	14:30	14:30	14:30	14:30	14:30	14:30
Steve	14:45	14:45	14:45	14:45	14:45	14:45	14:45
Tony	15:00	15:00	15:00	15:00	15:00	15:00	15:00

Available Not Available Non-Work Hours

OK Cancel Help

6. Select an appointment time and click the **OK** button.

7. You will be taken back to the **Reschedule Appointment** screen.

Reschedule an Appointment

Reschedule an Appointment

Current Appointment

Provider: Carla
Date: Monday, 21 June 2021
Time: 08:30
Duration: 30 mins

New Appointment

Provider: Carla
Date: Thursday, 24 June 2021
Time: 10:45
Duration: 30 mins

Notes:

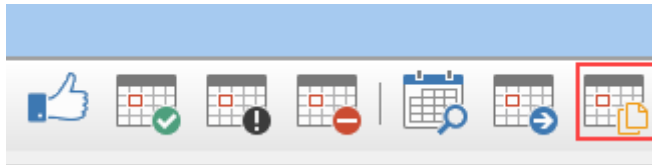
Reschedule Cancel Help

8. Click the **Reschedule** button to complete the process.

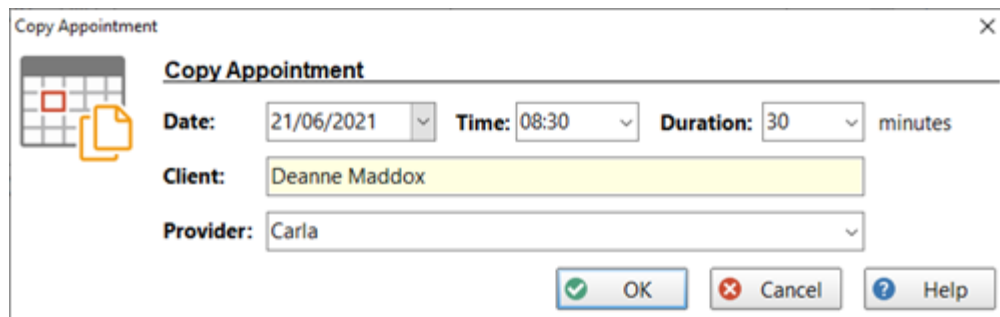
Copying an Appointment

To save time, you can copy an existing appointment's details to a new date and/or time.

1. Select an appointment.
2. Click the **Copy Appointment** button.



3. Select a new **Date, Time, Duration** and/or **Provider**.

A dialog box titled "Copy Appointment" with a close button (X) in the top right corner. On the left is a small calendar icon with a yellow document icon overlaid. The main area contains the following fields:

- Date:** 21/06/2021 (dropdown)
- Time:** 08:30 (dropdown)
- Duration:** 30 (dropdown) minutes
- Client:** Deanne Maddox (text input)
- Provider:** Carla (dropdown)

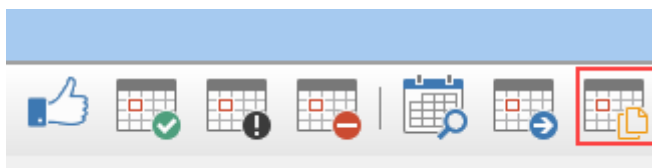
At the bottom are three buttons: "OK" (green checkmark), "Cancel" (red X), and "Help" (blue question mark).

4. Click **OK** when you're ready. The new appointment will be created.

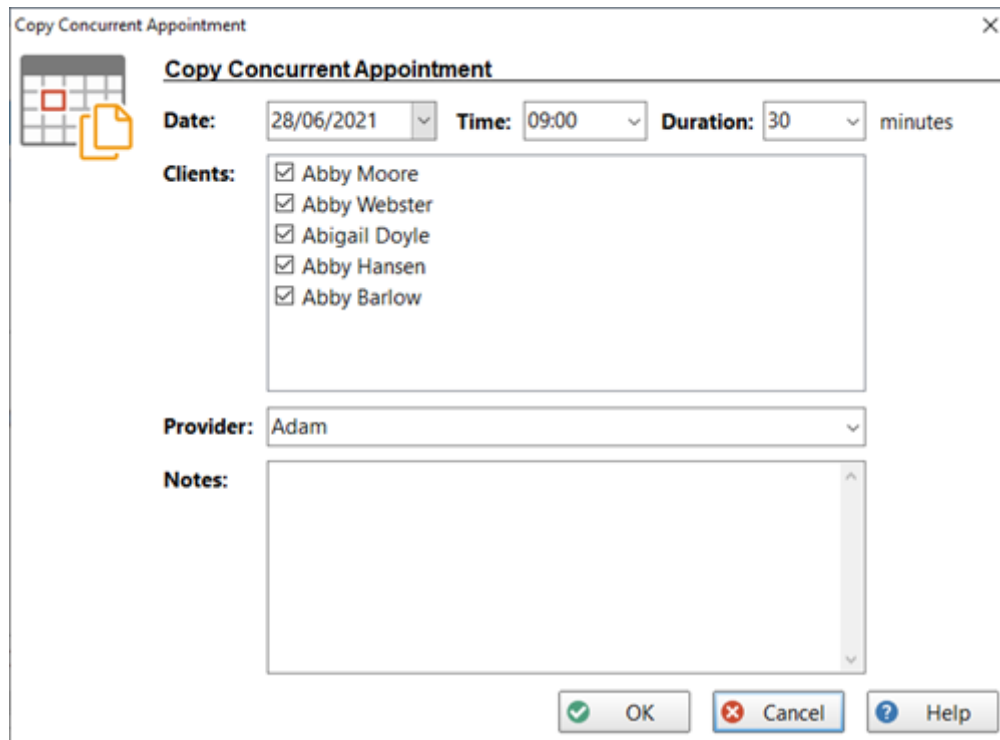
Copying a Concurrent Appointment

In addition to standard appointments, you can also copy existing Concurrent Appointments.

1. Select a **Concurrent Appointment**.
2. Click the **Copy Appointment** button.



3. You can select a new **Date**, **Time**, **Duration** and **Provider** for the new appointment.



Copy Concurrent Appointment

Date: 28/06/2021 **Time:** 09:00 **Duration:** 30 minutes

Clients:

- Abby Moore
- Abby Webster
- Abigail Doyle
- Abby Hansen
- Abby Barlow

Provider: Adam

Notes:

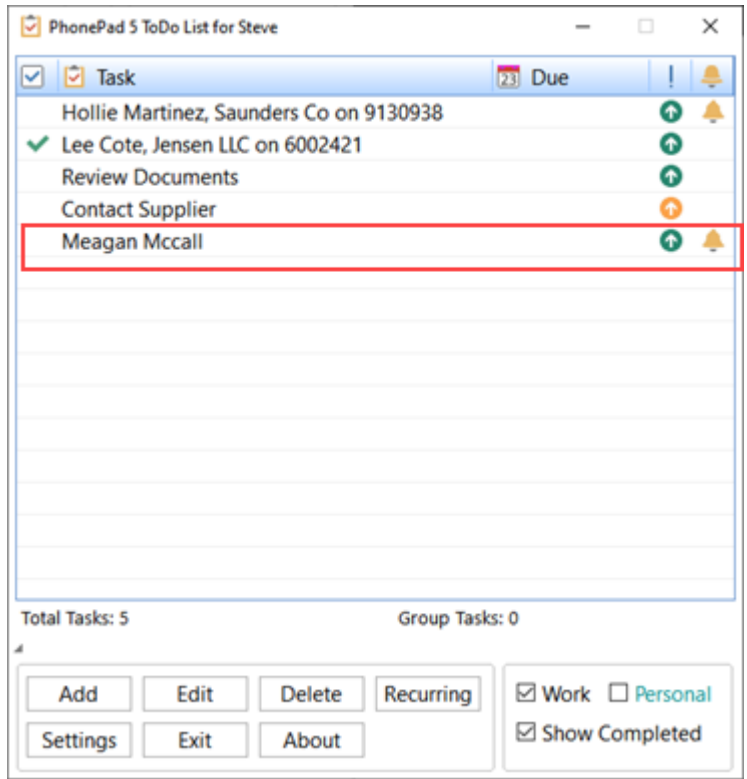
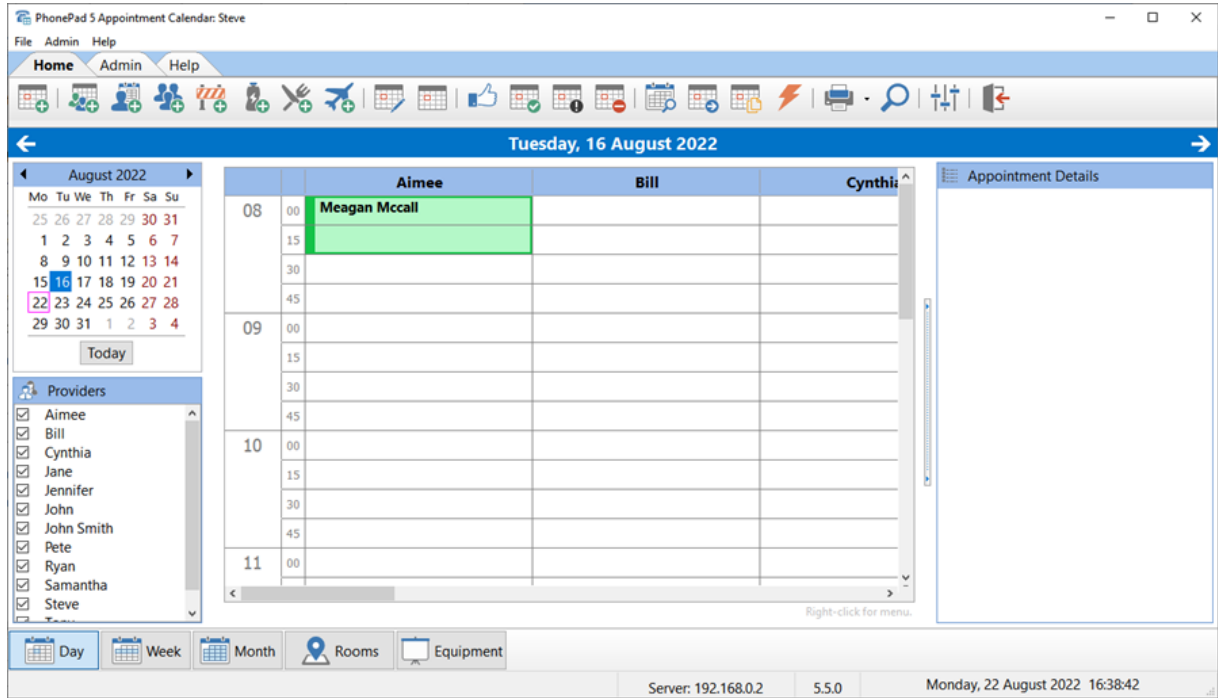
OK Cancel Help

4. You can uncheck any **Clients** that won't be included in the new appointment.
5. Click **OK** when you're ready. The new appointment will be created.

Drag and Drop to the To Do List

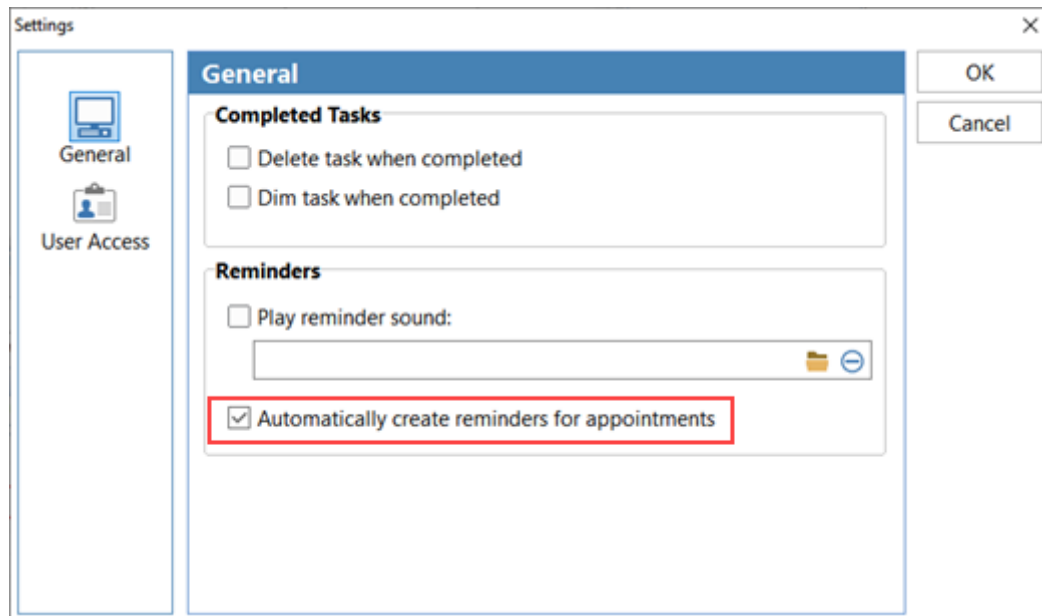
Appointments can be added to the To Do List using drag 'n' drop.

1. Select the appointment.
2. While holding down the **<alt>** key and **left mouse button**, drag the appointment from the Appointment Calendar to the To Do List.



The advantage of this is that you can set reminders for the appointment. You can do this manually or set it up to automatically add reminders.

In the To Do List settings is a ***Automatically Create Reminders for Appointments*** checkbox. When checked, a reminder will be automatically created when you drag and drop an appointment to the To Do List.



Preferences

Each user has their own settings in Appointment Calendar.

Select **Preferences** from the **File** menu.

Preferences

User

Remember Selected User

Column Widths

Individual Column Widths

Set All Columns Widths the Same: 80

Month Calendar

Font Size: 8

Month Printout

Only show Start Time

Appointments

Double-clicking on an empty appointment time creates a new appointment

OK Cancel Help

User

Remember Selected User When checked, Appointment Calendar will remember which providers are selected between sessions. This saves you from having to select them each time.

Column Widths

Individual Column Widths

When selected, you can set the width of each column in the Day and Week views independently.

Set All Columns Widths the Same

When selected, all column widths in the Day and Week views will be the size specified.

Appointments

Month Calendar

Font Size Sets the size of the font used for listed appointments in the Month view.

Month Printout

Only Show Start Time When checked, the month printout won't show the End Time, saving on space.

Appointments

Double-clicking on empty appointment time When checked, you can create a new Standard Appointment by double-clicking in an empty time slot.

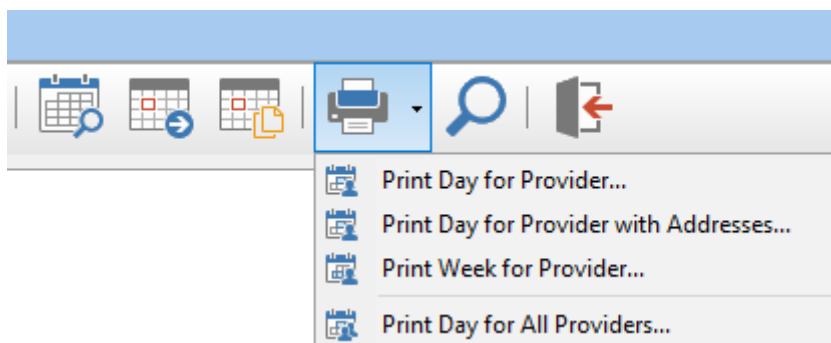
on empty appointment time creates a new Standard Appointment

Printing

Appointment Calendar features a number of printouts or reports.

To access these, click the **Print** button on the **Home** toolbar.

You will be presented with a menu of printout options:



The number of printouts will be expanded as we receive feedback/requests from Appointment Calendar clients.

<i>Print Day for Provider</i>	Prints all appointments for the selected day and selected Provider. Switch to Day view to use this option.
<i>Print Day for Provider with Addresses</i>	Same as the above option but includes Client addresses. Switch to Day view to use this option.
<i>Print Week for Provider</i>	Prints all appointments for the selected week and selected provider. Switch to Week view to use this option.
<i>Print Day for All Providers</i>	Prints all appointments for all providers for the selected day.

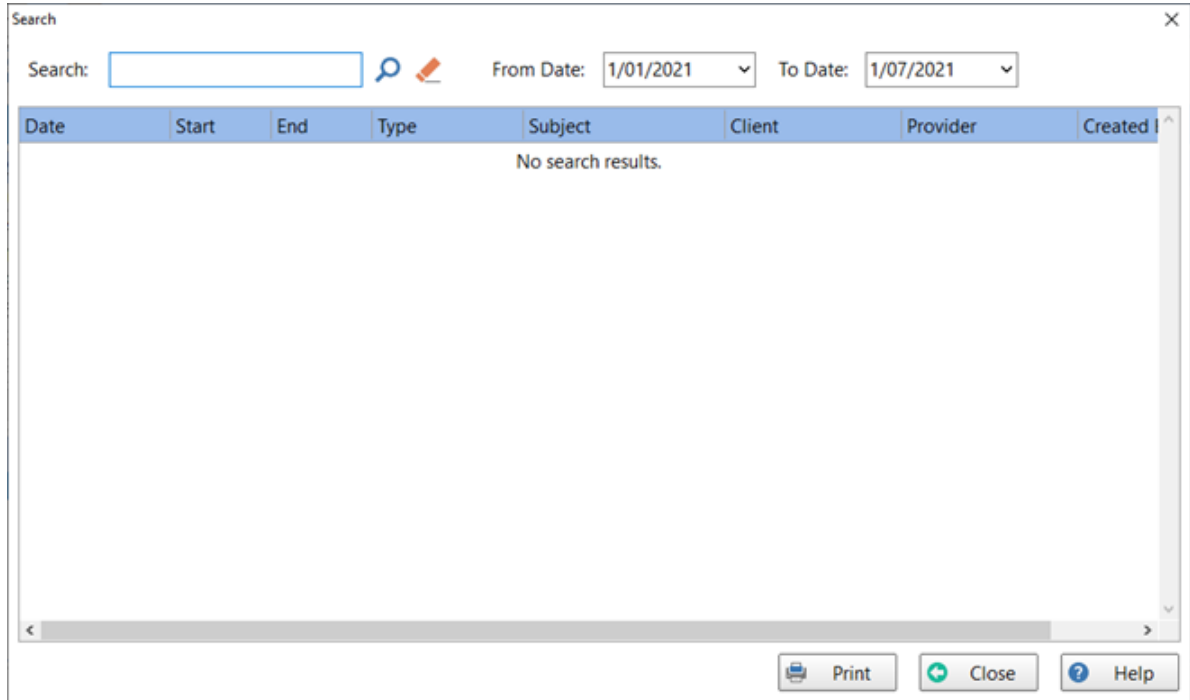
Searching

The Search feature allows you to search for appointments by **Subject**, **Client** and **Provider**.

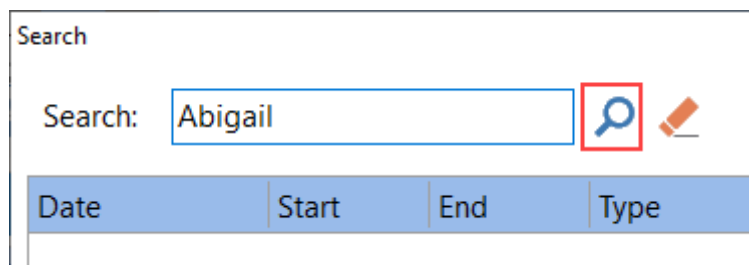
1. Click the **Search** button on the **Home** toolbar.



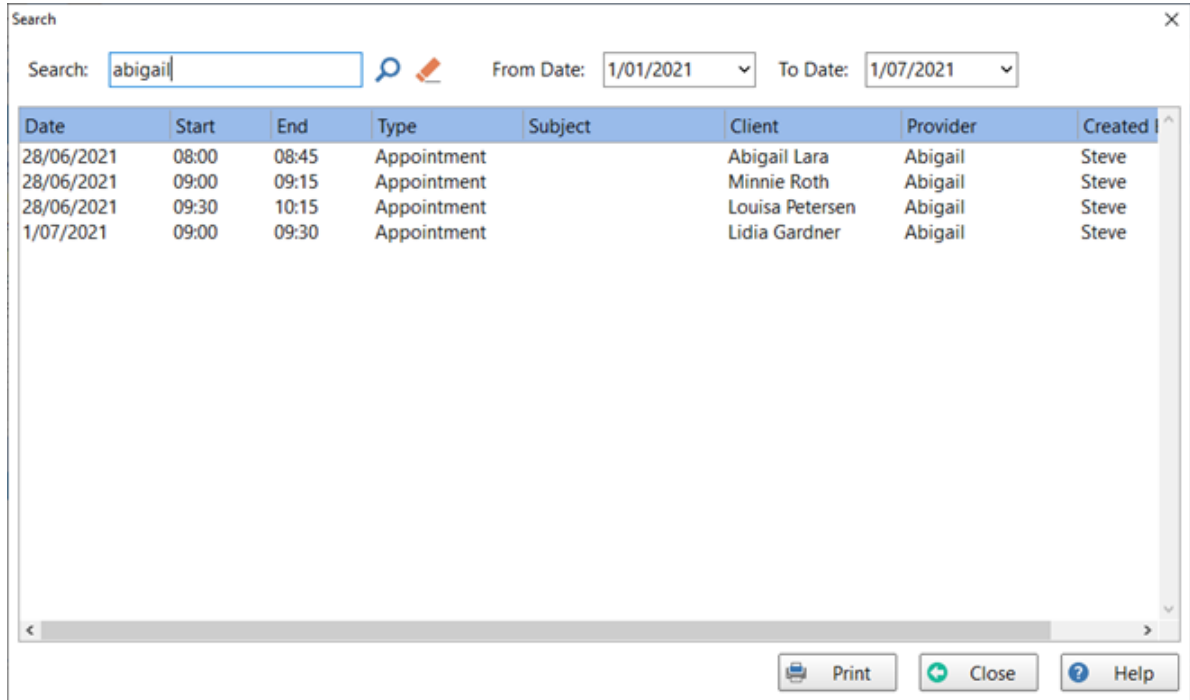
2. The **Search** window will appear.



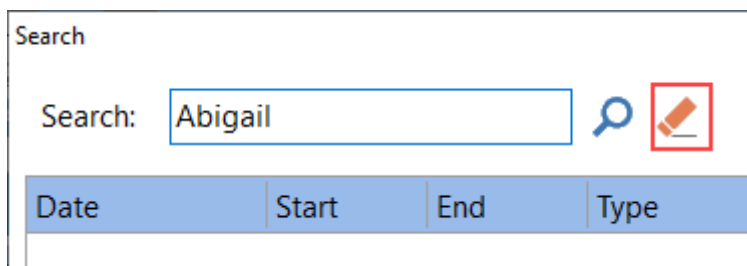
3. To search, select a date range and then enter the text you want to search for in the **Search** edit field. Click the **Search** button.



4. The search results will then be displayed.



- Double-clicking on an appointment in the search results will take you straight to that appointment in the calendar.
- You can clear a search by clicking the **Clear Search** button.



- Clicking the **Print** button will print the search results.

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Chapter

8

Administration

Administration

The Administration toolbar and menu are only available to System Administrators as defined in PhonePad.



Rooms

To view and manage the available rooms, click the **Rooms** button on the toolbar, or select **Manage Rooms** from the **Admin** menu.



This screen allows you to add, edit and delete rooms for meetings.

Manage Rooms
✕

Room Name	Available
Meeting Room 1	<input checked="" type="checkbox"/>
Meeting Room 2	<input checked="" type="checkbox"/>
Meeting Room 3	<input checked="" type="checkbox"/>
Conference Room	<input checked="" type="checkbox"/>
Padded Room	<input checked="" type="checkbox"/>

Add

Edit

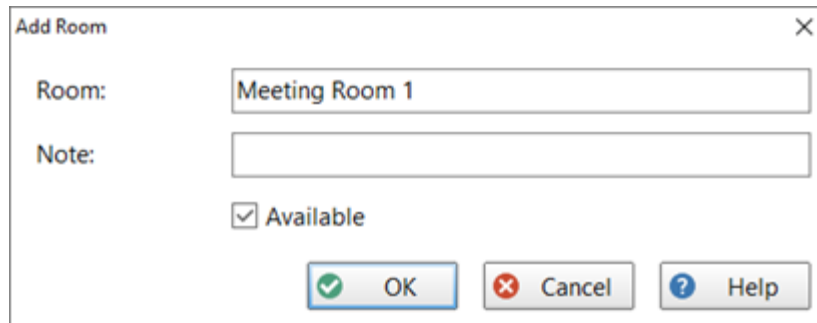
Delete

Close

Help

Adding a Room

Adding a room is simply a matter of click the **Add** button and filling out the name of the room.



Room Name of the room.

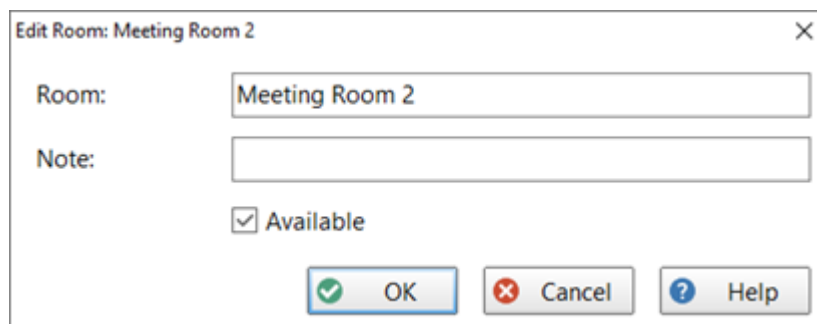
Note Optional note about the room.

Available If unchecked, the room cannot be selected for meetings.

Click **OK** to finish adding the room, and **Cancel** to cancel adding the room.

Editing a Room

To edit a room, select the room from the list and click the **Edit** button. Or double-click on the room.



Room Name of the room.

e
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r
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o
m
.

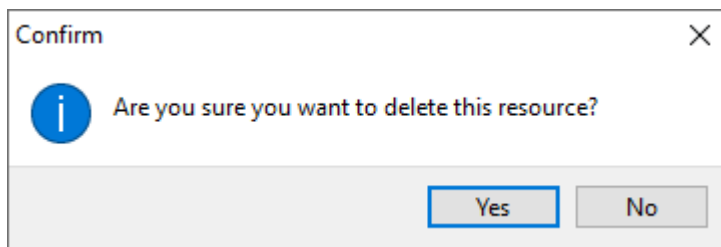
Note Optional note about the room.

Available If unchecked, the room cannot be selected for meetings.

Click **OK** to save any changes, and **Cancel** to cancel any changes.

Deleting a Room

If you need to delete a room, select it from the list and click the Delete button. You will be asked to confirm the deletion.

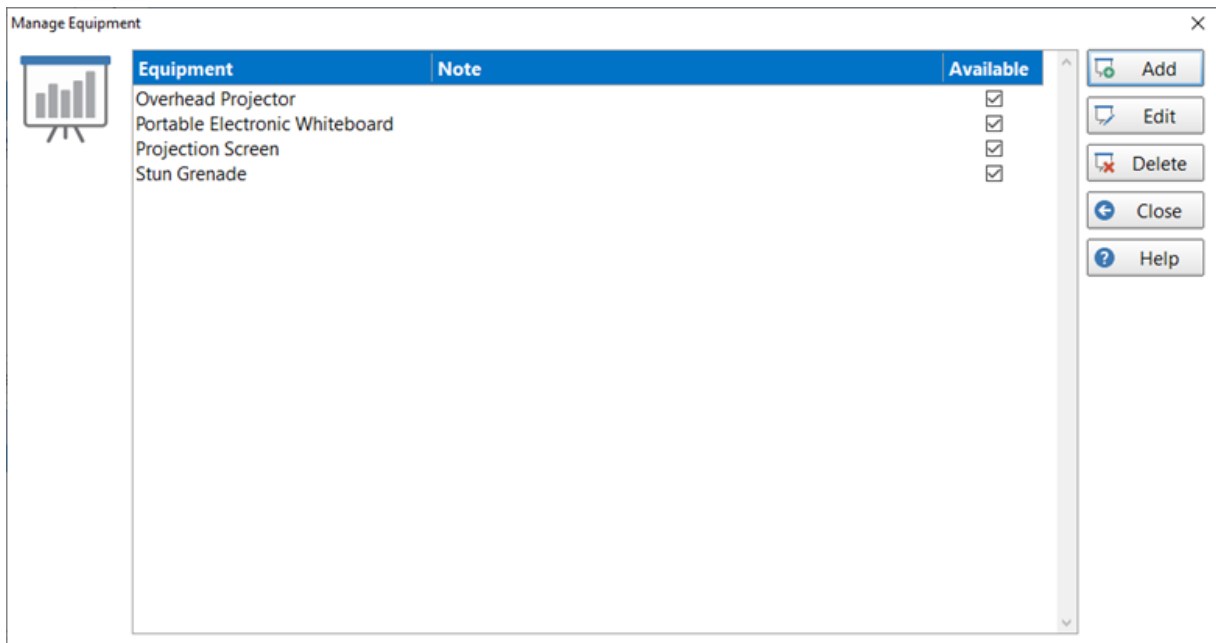


Equipment

To view and manage the available equipment, click the **Equipment** button on the toolbar, or select **Manage Equipment** from the **Admin** menu.



This screen allows you to add, edit and delete equipment.



Adding Equipment

You can add equipment by clicking the **Add** button and filling out the name of the equipment.

The screenshot shows a dialog box titled "Add Equipment" with a close button (X) in the top right corner. It contains three input fields: "Equipment:" with the text "Projector", "Note:" with the text "Located in storeroom.", and a checked checkbox labeled "Available". At the bottom, there are three buttons: "OK" (with a green checkmark icon), "Cancel" (with a red X icon), and "Help" (with a blue question mark icon).

Equipment Name of the equipment.

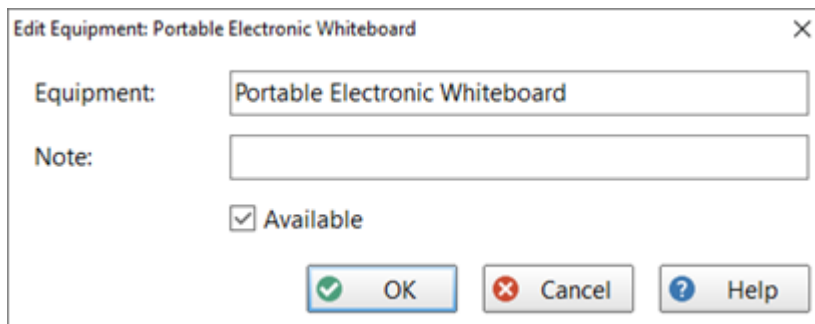
Note Optional note about the equipment.

Available If unchecked, the equipment cannot be selected for meetings.

Click **OK** to finish adding the equipment, and **Cancel** to cancel adding the equipment.

Editing Equipment

To edit equipment, select the equipment from the list and click the **Edit** button. Or double-click on the room.



Dialog box titled "Edit Equipment: Portable Electronic Whiteboard".

Fields:

- Equipment: Portable Electronic Whiteboard
- Note: (empty)
- Available

Buttons: OK, Cancel, Help

Room N
a
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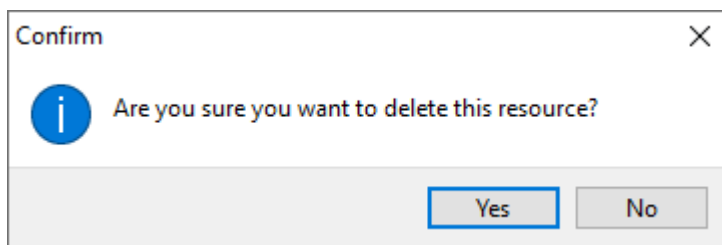
Note Optional note about the equipment.

Available If unchecked, the equipment cannot be selected for meetings.

Click **OK** to save any changes, and **Cancel** to cancel any changes.

Deleting Equipment

If you need to delete equipment, select it from the list and click the Delete button. You will be asked to confirm the deletion.



Appointment History

Every change that happens in Appointment Calendar is record in the Appointment History.

To view the **Appointment History**, click on the **Appointment History** button on the **Admin** toolbar, or select **Appointment History** from the **Admin** menu

History Date	Date	Start	End	Type	Client	Provider	Subject	Notes
25/06/2021 15:12	25/06/2021	09:00	10:00	Client Appointment	Terrence Duke	Jane		
25/06/2021 15:12	25/06/2021	09:00	10:00	Client Appointment	Terrence Duke	Jane		
25/06/2021 15:12	25/06/2021	09:00	10:00	Client Appointment	Paul Cole	Jennifer		
25/06/2021 15:11	25/06/2021	08:00	09:00	Client Appointment	Rene Swanson	Jennifer		
25/06/2021 15:10	25/06/2021	09:00	10:00	Client Appointment	Marguerite Parrish	Bill		Changed he
25/06/2021 15:10	25/06/2021	09:00	10:00	Client Appointment	Marguerite Parrish	Bill		
25/06/2021 15:09	25/06/2021	08:15	09:15	Client Appointment	Marci Carr	Cynthia		
25/06/2021 15:09	25/06/2021	08:00	09:00	Client Appointment	Nita Hansen	Bill		
25/06/2021 12:17	25/06/2021	08:45	09:00	Client Appointment	Aaron Lara	Aimee		

The latest entries are displayed at the top.

You have the option of viewing or printing the Appointment History.

View Appointment History

To view an Appointment History entry, select the entry from the list and click the **View** button, or double-click on the entry.

Here are a couple of examples:

The screenshot shows a window titled "View Appointment History" with a close button (X) in the top right corner. The window is divided into two main sections. The left section contains a list of appointment details, each in a yellow-highlighted text box:

- History Date: 25/06/2021 3:10:29 PM
- Appointment Date: 25/06/2021
- Start Time: 09:00
- End Time: 10:00
- Type: Client Appointment
- Provider: Bill
- Client: Marguerite Parrish
- Subject: (empty)
- User: Aimee

The right section contains two text areas, also yellow-highlighted:

- Notes: Changed her mind.
- Action: Appointment Canceled

At the bottom right of the window, there are two buttons: "Close" (with a green arrow icon) and "Help" (with a blue question mark icon).

View Appointment History ✕

History Date:	25/06/2021 3:15:08 PM	Notes:	
Appointment Date:	25/06/2021		
Start Time:	13:00		
End Time:	14:00		
Type:	Client Appointment		
Provider:	Cynthia	Action:	Appointment Updated Start Time changed from 10:00 to 13:00 End Time changed from 11:00 to 14:00
Client:	Lynda Mcknight		
Subject:			
User:	Aimee		

← Close ? Help

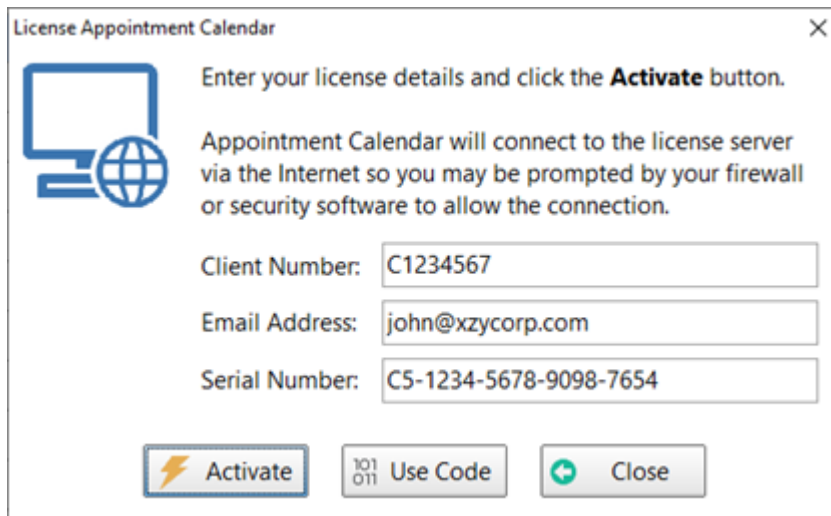
Licensing Appointment Calendar

When you purchase Appointment Calendar, you will receive your license details via email. You can also login to your online account at <https://www.myphonepad.com> and retrieve them from there.

Click on the **License** button on the **Admin** toolbar, or select **License** from the **Admin** menu.

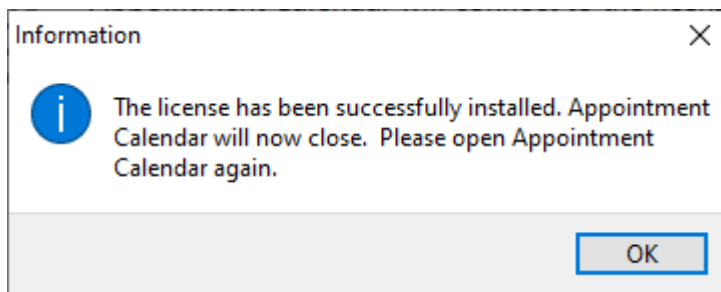


The following screen will be displayed. Enter your license information into the relevant fields.



Click the **Activate** button.

Your license details will be validated and then the following message should appear:



When you click the **OK** button Appointment Calendar will close to finish applying the license. You will need to restart it from PhonePad.

Admin Settings

Admin Settings is used by PhonePad System Administrators to configure Appointment Calendar to your organization's specific needs.

Click the **Admin Settings** button on the **Admin** toolbar, or select **Admin Settings** from the **Admin** menu.



Admin Settings

Appointments

Appointment Settings

Appointment Length: 15 mins

First Appointment: 08:00

Last Appointment: 17:00

Skip weekends for Multi-Day appointments

Calendar Setup

First Day of Week: Monday

Time

24 Hour Time (Military Time)

12 Hour Time

New Client Screen

Identification Label: Identification

Identification Hint: Client No, Patient No, etc

Appointment Cancelling

Require Notes on Cancel

User Labeling

Set this to something appropriate for your business.

User Label: User

Appointments

Appointment Name:

Use Client Name

Use Company Name

Client Label: Client

2nd Line:

3rd Line:

Appointment Colors

Standard: Custom

Concurrent: Custom

Miscellaneous: Custom

Meeting: Custom

Personal: Custom

Break: Default

Meal Break: Custom

Leave: Custom

Reset Colors

OK

Cancel

Help

Appointments

There are various settings you can change to customize Appointment Calendar.

Appointment Settings

Appointment Length First Appointment

When checked, the MessageSender service will process messages in the message queue.

This is the time of the first appointment of the day. If office hours start earlier on some days, set this time to the time of the first appointment for the earliest day.

For example, if the first appointment is normally at 9:00am but one day a week it's at 8:00am, then set this time to 8:00am.

Last Appointment

This is the time of the last possible appointment of the day. If office hours are longer on some days, set this time to the last appointment time for the latest day.

For example, if the last appointment is normally at 4:45pm but one day a week the last appointment is 8:45pm, then set this time to 8:45pm.

Skip Weekends for Multi-Day Appointments When checked, the MessageSender service will process messages that are queued to be sent via Pushover.

Process Every x Minutes When checked, any multi-day appointments that are created won't include weekends.

Calendar Setup

First Day of Week With this option you can set which day starts the week, ie. Sunday or Monday. This setting applies to the calendar as well as the Week and Month views.

Time

24 Hour Time If you prefer 24 hour time (the default) select this option. The time will be displayed in this format throughout Appointment Calendar.

12 Hour Time If you prefer 12 hour time select this option. The time will be displayed in this format throughout Appointment Calendar.

New Client Screen

Identification Label Appointment Calendar provides an option for adding new clients directly in Appointment Calendar, instead of having to switch to PhonePad and entering them in the Address Book.

This setting changes the **Identification** (1) label on the **New Client** screen. The default is *"Identification"*.

Identification Hint

This setting changes the **Identification Hint** (2) on the **New Client** screen. The default is *"Client No, Patient No, etc."*.

Appointment Cancelling

Require Notes on Cancel

When checked, users will be required to enter a note when canceling an appointment.

User Labelling

User Label

In some places users are referred to as Providers. You can change this to anything you want, eg. *User, Doctor, Attorney, etc.*

Appointments

Appointment Name

Use Client Name - when selected, the name of the client will be displayed on the appointment calendar.

Use Company Name - when selected, the name of the company will be displayed on the appointment calendar.

- Client Label** The **Client Label** is set to *Client* by default. You can change this to something else if you prefer, eg. *Patient, Customer, etc.*
- 2nd Line** Where an appointment spans 2 or more time slots, you can specify what is displayed in the second time slot. The options are Address, Subject or Phone Number, or you can leave it blank.
- 3rd Line** Where an appointment spans 3 or more time slots, you can specify what is displayed in the third time slot. The options are Address, Subject or Phone Number, or you can leave it blank.

Appointment Colors

- Active** When checked, the MessageSender service will process messages in the message queue.
- Process Emails** When checked, the MessageSender service will process messages that are queued to be sent via email.
- Process SMS** When checked, the MessageSender service will process messages that are queued to be sent via SMS.
- Process Pushover** When checked, the MessageSender service will process messages that are queued to be sent via Pushover.
- Process Every x Minutes** Determines how frequently the MessageSender service should check for messages to process. The default is every 5 minutes.

Appointment Colors

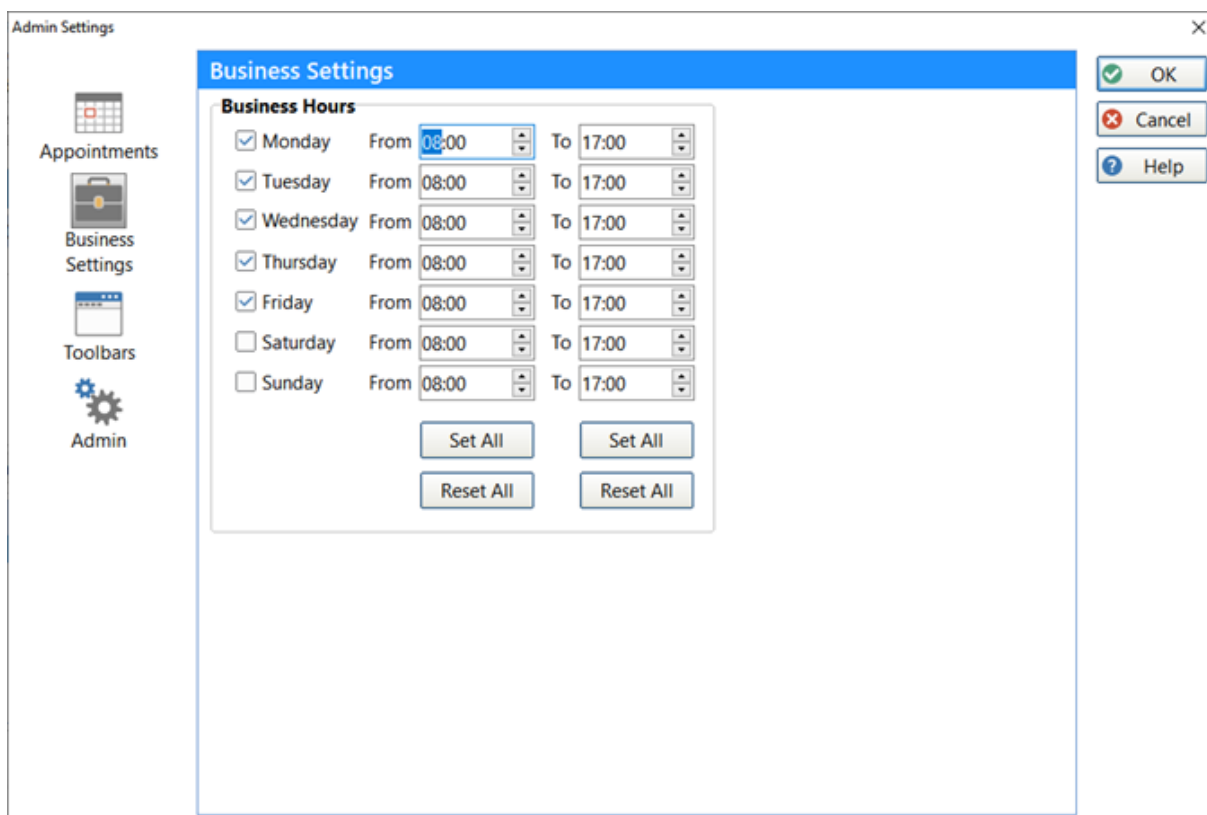
Standard Allows you to change the color of the various appointment colors.

Concurrent
Miscellaneous
Meeting
Personal
Break
Meal Break
Leave

Reset Colors Resets the colors back to their defaults.

Business Settings

This screen enables you to set the business hours for each day of the week. Use the check boxes to select the days you work. Set the start and end times for each day.



Business Hours

Set All Sets all times to the same time Monday is set to. For example, if the From is set to 10:00, clicking this button will change all days to that time.

Reset All Resets all times to the defaults.

Setting Your Business Hours

Set your **Business Hours** by checking the checkboxes for the days you are open.

Then, set the Start and End times for each day.

Business Hours

Monday From 08:00 To 17:00

Tuesday From 09:00 To 17:00

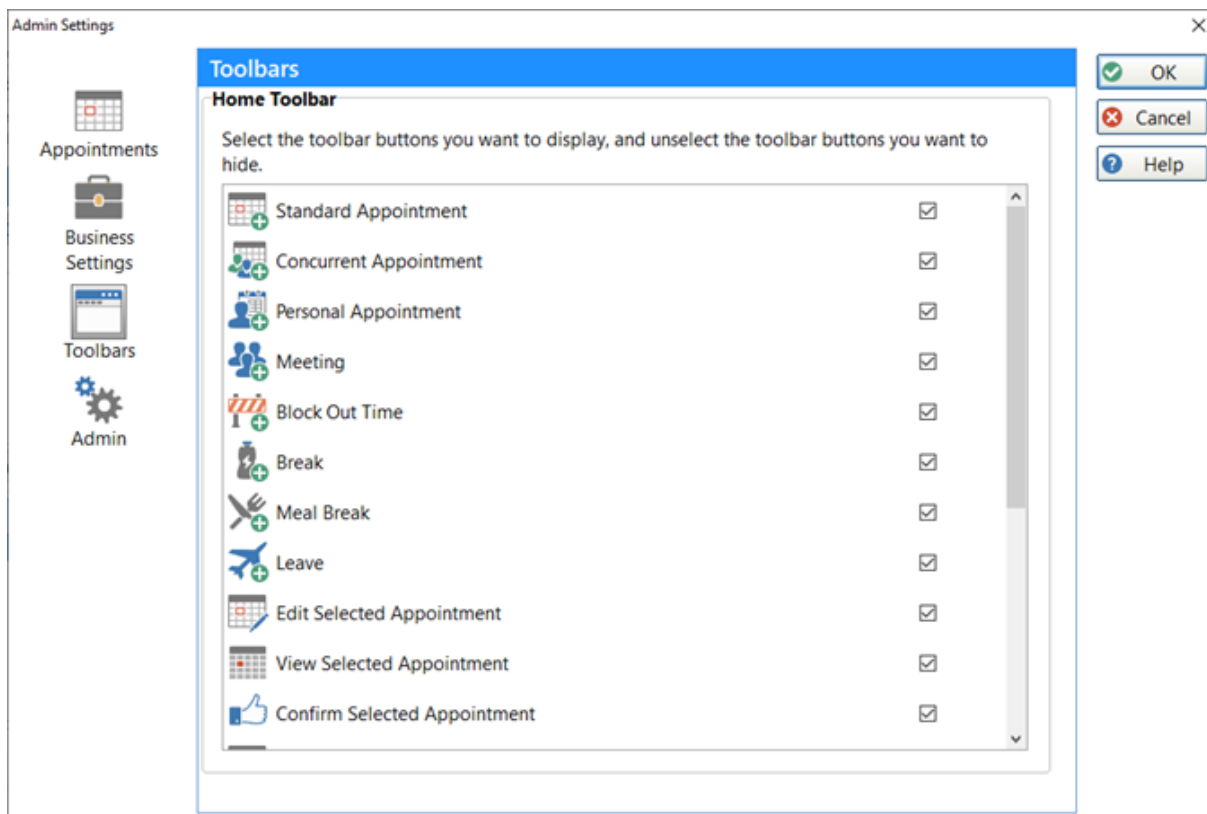
What If We Start Work at Different Times on Some Days?

Set the time for the earliest time you start. You can then create a repeating Block Out Time for the days you start later.

This also applies to days you may finish earlier. In that case, set the End Time to the latest possible time and then create a repeating Block Out Time for the days you finish earlier.

Toolbars

Appointment Calendar has lots of options on the [Home toolbar](#)³³, with quite a few different [appointment types](#)⁴⁸. If you don't use all of these buttons then you can easily hide the ones you don't use.



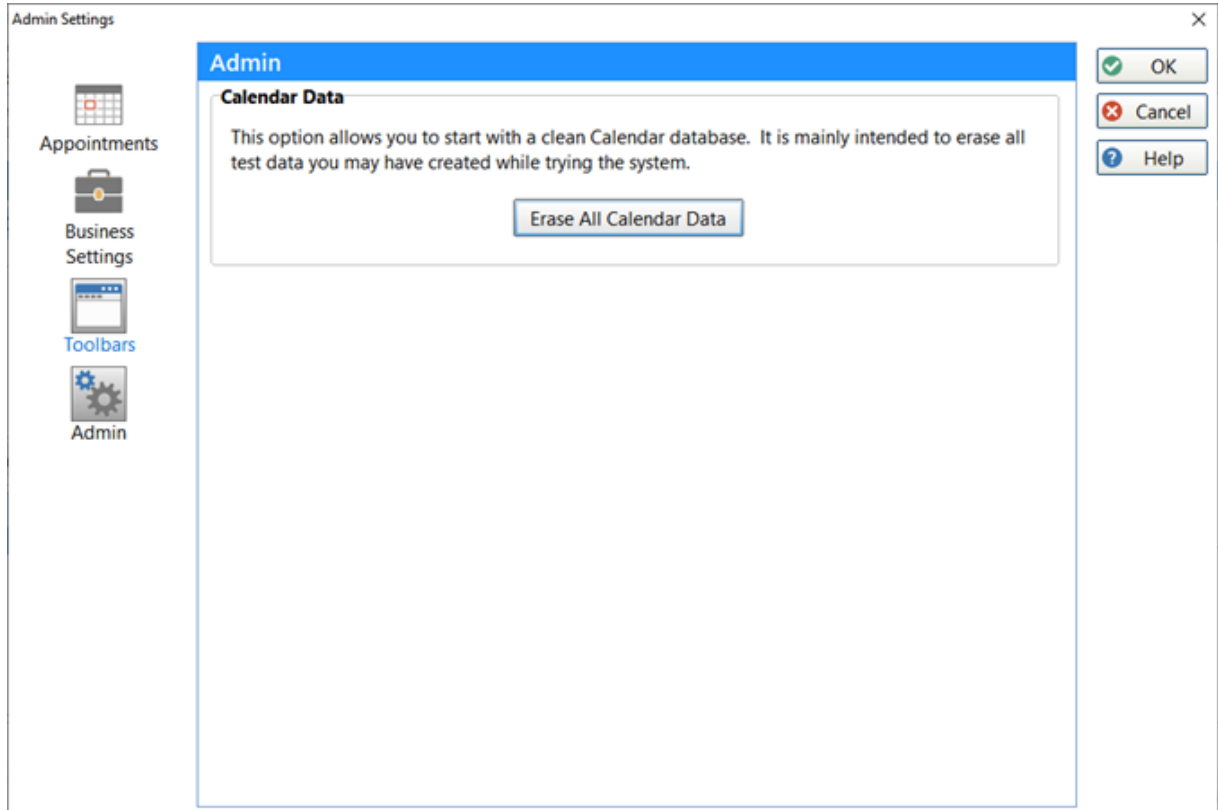
Unselect the buttons you don't need and they will no longer appear on the [Home toolbar](#)³³. Make sure you click **OK** to save your changes.

Admin

Use this option with care. It will delete all of your Appointment Calendar data.

You can use this option to reset your Appointment Calendar data if you entered dummy data during your trial period.

To erase you data, click the **Erase All Calendar Data** button. You will be asked twice to confirm the deletion.



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Chapter

9

Support

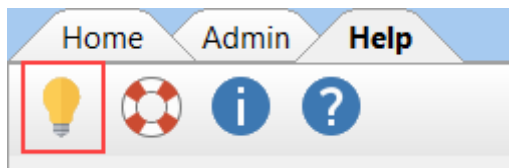
Support

The Support toolbar has buttons for sending in suggestions for improving Appointment Calendar, getting help from support staff, viewing information about Appointment Calendar, and accessing online help.



Suggestions

We're always looking for ways we can improve our software. If you feel that there is something missing from Appointment Calendar, or you would like certain features added, click the Suggestions button on the Help toolbar, or select Suggestions from the Help menu.



We are only interested in constructive feedback so if you have some then please tell us about it!

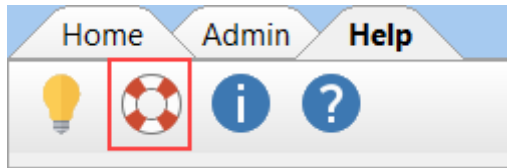
We can't promise that every idea will be implemented but we will definitely consider all suggestions.

If you are having problems with Appointment Calendar or need assistance with it, please use the [Support](#)^[138] option instead. The Suggestions mailbox is only checked once every two or three weeks so if you send support requests using Suggestions you will be waiting for a while.

Sending a Support Request

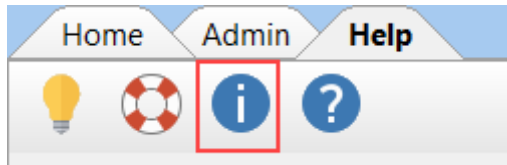
If you are having problems with Appointment Calendar then we want to know about it. Don't keep it to yourself. We want you to be happy with your software so we are eager to correct any issues you are experiencing.

To send a Support Request, click on the **Support** button on the **Help** toolbar, or select **Support** from the **Help** menu.

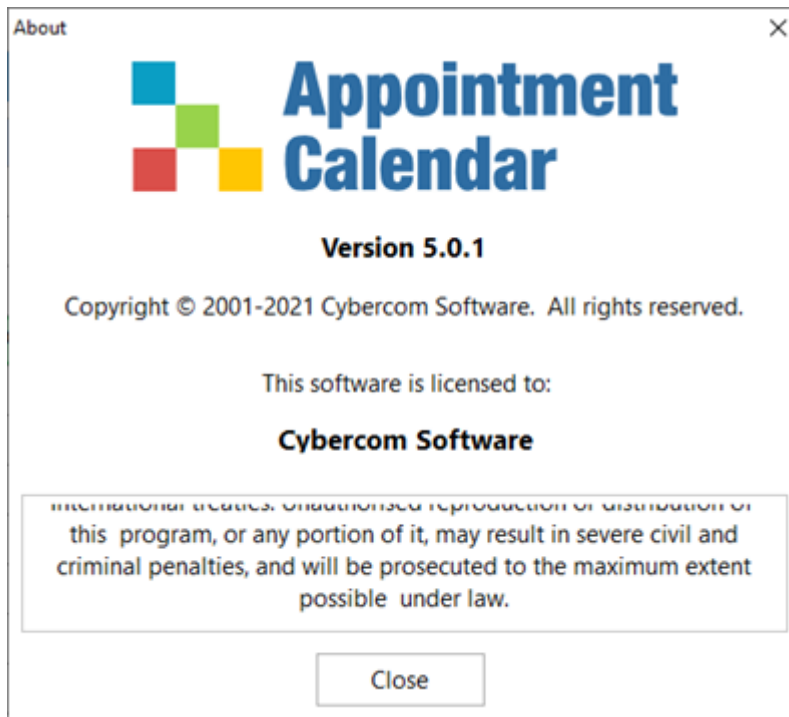


About

Click the **About** button on the **Help** toolbar to display information about Appointment Calendar, or select **About** from the **Help** menu.



The following screen will be displayed. It shows the current Version Number of Appointment Calendar that is installed, and who it's licensed to.

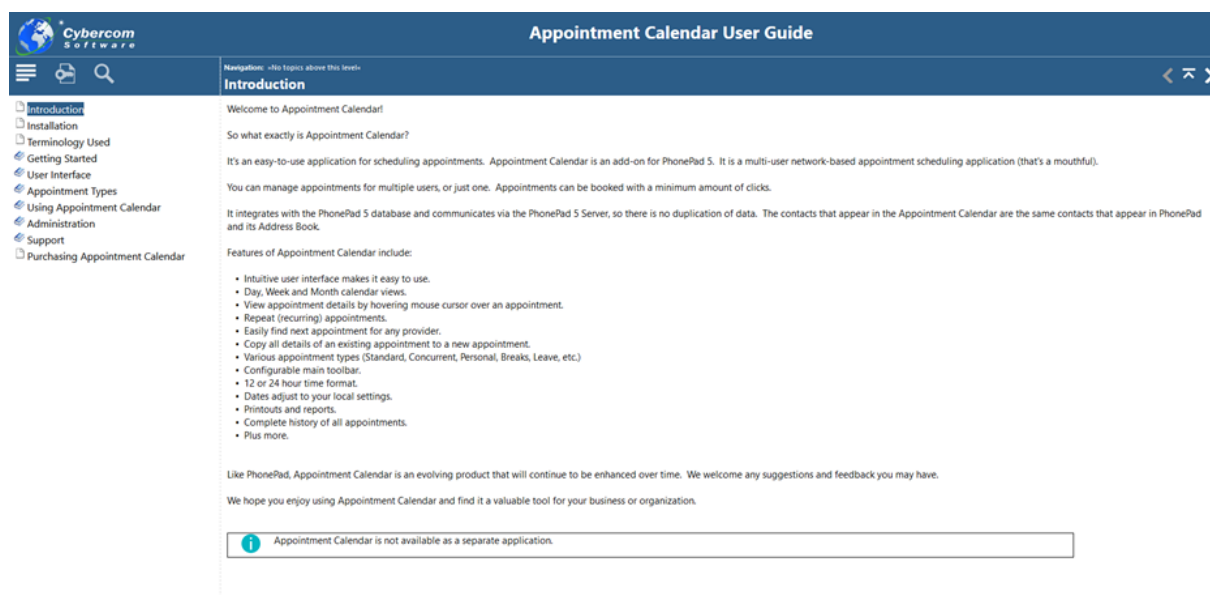


Help

If you need help on anything in Appointment Calendar, click the **Help** button on the **Help** toolbar, or select **Help** from the **Help** menu.



Online help will be displayed.

A screenshot of the 'Appointment Calendar User Guide' help page. The page has a dark blue header with the Cybercom Software logo and the title 'Appointment Calendar User Guide'. A navigation bar below the header shows 'Introduction' as the active section. On the left, a sidebar lists various topics like 'Introduction', 'Installation', 'Terminology Used', etc. The main content area starts with 'Welcome to Appointment Calendar!' and 'So what exactly is Appointment Calendar?'. It describes the application as an easy-to-use scheduling tool for PhonePad 5. A list of features is provided, including intuitive interface, multiple calendar views, appointment details, recurring appointments, and integration with PhonePad 5. At the bottom, there is a note: 'Appointment Calendar is not available as a separate application.'

Chapter

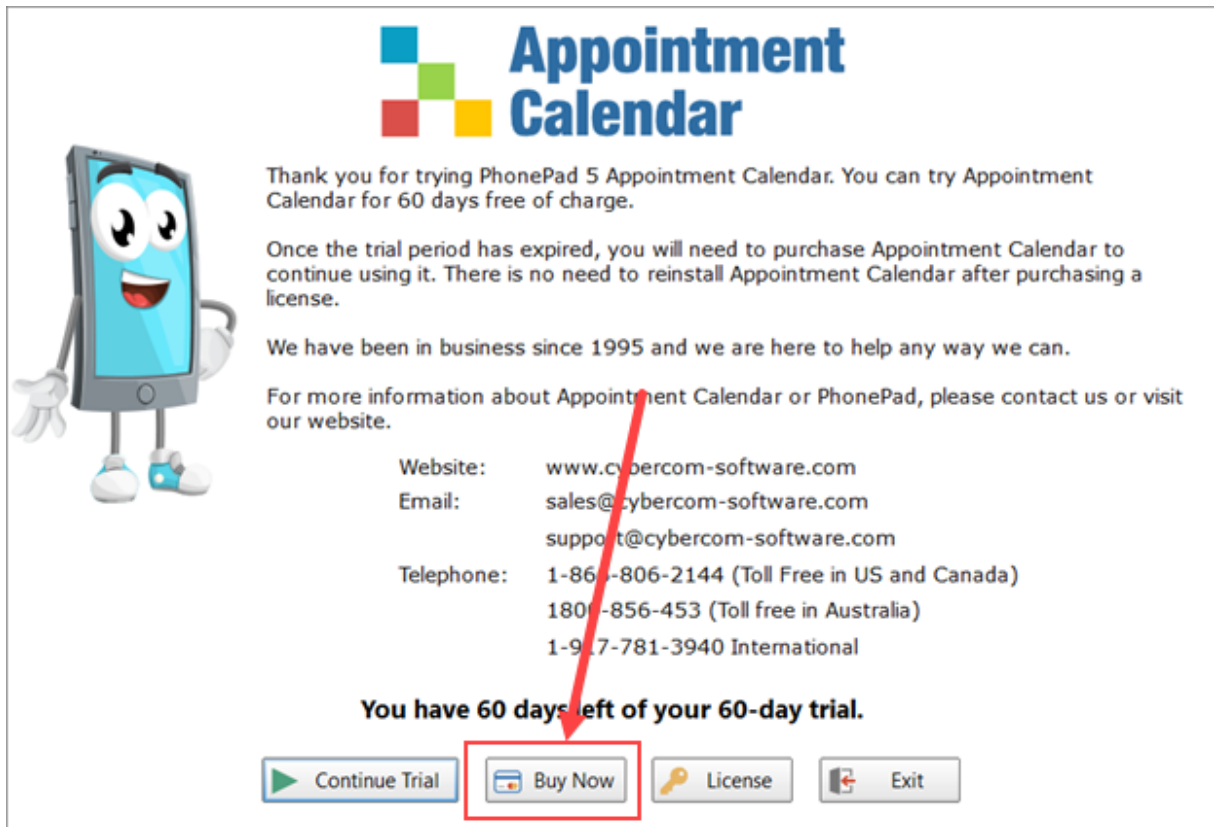
10


Purchasing Appointment Calendar

Purchasing Appointment Calendar

Appointment Calendar can be purchased from the Trial screen.

Just click the **Buy Now** button and you will be taken to our secure order page.





Thank you for trying PhonePad 5 Appointment Calendar. You can try Appointment Calendar for 60 days free of charge.

Once the trial period has expired, you will need to purchase Appointment Calendar to continue using it. There is no need to reinstall Appointment Calendar after purchasing a license.

We have been in business since 1995 and we are here to help any way we can.

For more information about Appointment Calendar or PhonePad, please contact us or visit our website.

Website: www.cybercom-software.com
Email: sales@cybercom-software.com
support@cybercom-software.com
Telephone: 1-866-806-2144 (Toll Free in US and Canada)
1800-856-453 (Toll free in Australia)
1-917-781-3940 International

You have 60 days left of your 60-day trial.



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▶ [Click here for more information on ordering and pricing](#)




If you have any problems purchasing, please contact sales@cybercom-software or phone 1-866-806-2144.

Products	Price
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MessageSender 6 \$47.00 Add Remove	0.00
Automatically forward your PhonePad phone messages to email, SMS and Pushover. Only one license needed. Requires PhonePad 5. ▶ MessageSender home page .	
Appointment Calendar 5 \$87.00 Add Remove	0.00
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Special Code: <input type="text"/> <input type="text"/> Apply Unapply	0.00
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