



How to make a Diary Appointment

Refers to:

Desktop form → Diary tab

Make diary appointment (top menu)

Quick method

- Highlight the diary line at the right time and then **double click**
- Begin entering the description of the appointment.
- Select the consultant who the appointment is to be for from the drop down box. The default is the User logged on.

Detailed method

- **Right click** on the date and time wanted and click **Make Appointment** (or Make Appointment: A Name)
- The form is brought up with the Date and Time (and Person's details if quick method used) entered.
- Select the consultant who the appointment is to be for from the drop down box. The default is the User logged on
- Tick the **Popup notification** box, if wanted and enter how many minutes before the time the reminder should appear.
- If the appointment is a reminder accept the default radio button
- If the appointment is for a time click the radio button for the type of time period and enter the duration.
- Enter a brief description of the appointment.
- An appointment can be linked to a company, a person, or both. Click the **company** or **person** button to bring up the selection forms. If the shortcut has been used the Person's details were selected with the right click on date and time.
- Notes can be kept about an appointment.

If you have another form open:

If the appointment is to be with the currently selected person in a grid or form, click the **Make Diary Appointment** button on the main toolbar, the desk top will be brought up and the links will be included in the appointment dialogue.

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