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.

Back to Online Users Guide
Back to Desktop

From:
https://iqxusers.co.uk/iqxhelp/ - **IQX**

Permanent link:
https://iqxusers.co.uk/iqxhelp/doku.php?id=ug5-8

Last update: **2017/12/01 16:35**