Appointments Module

September, 2023

# Overview

Streamline the process of adding and organizing your clients' appointments. Whether your clients need to schedule multiple appointments for your services or make changes to existing ones, our appointments module allows you to seamlessly add new appointments, check in clients, reschedule, edit, or cancel appointments with ease.

## Placeholder image

### Appointment Scheduling

Effortlessly schedule or reschedule the date and time for your clients' appointments with precision and convenience.

## Appointment Check-in

This module provides a seamless check-in and check-out experience for your clients during their appointment times, ensuring a smooth and efficient process.

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# How To

1. [Add an appointment](#kenu8ieia49l)
2. [Filter appointments](#d8zkvdv44rs4)
3. [Check-in / check-out a client for their appointment](#539lbqwb59ly)
4. [Reschedule or cancel an existing appointment](#qhphdalhp4db)

**Create a new appointmen****t:**

To add a new appointment, click the +Add button:

* Select the client from the drop-down menu.
* If the client is Checked In at the time, click on “Is Checked”.
* Proceed to select the appointment date and time.

**Filter appointments:**

Appointments can be filtered based on client name simply by using the search bar or by appointment status which includes:

* New
* Checked-In
* Checked-Out
* Schedules
* Deleted

To filter appointments by status:

* goto search bar
*  click the filter icon
* Choose the desired option for appointment status from the drop-down.

**Check-In/Check-Out clients:**

Clients who have appointments scheduled can be checked in before their appointment and checked out once completed.

To check-in the visiting clients:

* Find the client using the search bar
* Goto ellipses to the far right to check-In
* Once checked in, clients can be checked out by following the same procedure and choosing the check-out option.

**Reschedule or cancel an appointment:**

Clients may want to reschedule or cancel their existing appointments.

To reschedule or cancel appointments:

* Find the client you would like to make appointment changes for using the search bar
* Goto ellipses to the far right
* Choose “Schedule” to change the appointment date and/or time
* Choose “Delete” to cancel the appointment.