

QMATIC

MANUAL

APPOINTMENT BOOKING

229.01L

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1. Installation

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1.1 General information

Appointment Booking provides an efficient and user friendly way for staff members to manually book appointments. This could for example be at a call centre or at a reception.

Changes made will be effective the next time a user logs out and in again. It is recommended that changes are done during non-office hours.

This application can only be used on the central system and not on distributed agents.

Requirements

- Appointment Booking is only supported by Orchestra 7 and later.
- Appointment Booking requires that the calendar functionality is set up in Calendar Admin.
- Some settings require that PS Notification 1.8 or later is installed. See “2.1.1 Change standard booking confirmation” on page 6 and “2.3.2 Add custom information” on page 8
- The advanced search functionality is available from Orchestra 7.1 and Appointment Booking 4.1.0.

1.2 Install Appointment Booking

If you install Appointment Booking using Qmatic Xtend, please proceed to step 5.

1. Copy appointmentbooking.war to <Orchestra_install_dir>\system\deploy.
2. Copy appointmentbooking.properties to <Orchestra_install_dir>\system\conf\lang. Also add any additional language files.
3. Add all required access modules by executing the following queries in qp_central:

Postgres:

INSERT INTO applications

(id,branch_app,is_distributed,enabled,icon_url,url,version,view_index)

VALUES ('appointmentlist', true, false, 0, NULL, NULL, 1, 101);

INSERT INTO application_modules

(id,is_distributed,enabled,icon_url,privilege_level,url,view_index,application_id)

VALUES ('appointmentlist', 0, 0, NULL, 20, NULL, 0, 'appointmentlist');

```
INSERT INTO applications
(id,branch_app,is_distributed,enabled,icon_url,url,version,view_index)
VALUES ('appointmenthistoryaudit', true, false, 0, NULL, NULL, 1, 101);
```

```
INSERT INTO application_modules
(id,is_distributed,enabled,icon_url,privilege_level,url,view_index,application
_id)
VALUES ('appointmenthistoryaudit', 0, 0, NULL, 20, NULL, 0,
'appointmenthistoryaudit');
```

```
INSERT INTO applications
(id,branch_app,is_distributed,enabled,icon_url,url,version,view_index)
VALUES ('appointmentbookingclient', true, false, 0, NULL, NULL, 1, 101);
```

```
INSERT INTO application_modules
(id,is_distributed,enabled,icon_url,privilege_level,url,view_index,application
_id)
VALUES ('appointmentbookingclient', 0, 0, NULL, 20, NULL, 0,
'appointmentbookingclient');
```

SQL server:

```
USE [qp_central]
GO
```

```
INSERT INTO [qp_central].[applications]
([id], [branch_app], [is_distributed], [enabled], [icon_url], [url], [version],
[view_index])
VALUES ('appointmentlist', 1, 0, 0, NULL, NULL, 1, 101)
GO
```

```
INSERT INTO [qp_central].[application_modules]
([id], [is_distributed], [enabled], [icon_url], [privilege_level], [url],
[view_index], [application_id])
```

```
VALUES ('appointmentlist', 0, 0, NULL, 20, NULL, 0, 'appointmentlist')
```

```
GO
```

```
INSERT INTO [qp_central].[applications]
```

```
([id], [branch_app], [is_distributed], [enabled], [icon_url], [url], [version],  
[view_index])
```

```
VALUES ('appointmenthistoryaudit', 1, 0, 0, NULL, NULL, 1, 101)
```

```
GO
```

```
INSERT INTO [qp_central].[application_modules]
```

```
([id], [is_distributed], [enabled], [icon_url], [privilege_level], [url],  
[view_index], [application_id])
```

```
VALUES ('appointmenthistoryaudit', 0, 0, NULL, 20, NULL, 0,  
'appointmenthistoryaudit')
```

```
GO
```

```
INSERT INTO [qp_central].[applications]
```

```
([id], [branch_app], [is_distributed], [enabled], [icon_url], [url], [version],  
[view_index])
```

```
VALUES ('appointmentbookingclient', 1, 0, 0, NULL, NULL, 1, 101)
```

```
GO
```

```
INSERT INTO [qp_central].[application_modules]
```

```
([id], [is_distributed], [enabled], [icon_url], [privilege_level], [url],  
[view_index], [application_id])
```

```
VALUES ('appointmentbookingclient', 0, 0, NULL, 20, NULL, 0,  
'appointmentbookingclient')
```

```
GO
```

Oracle:

```
INSERT INTO applications
```

```
(id,branch_app,is_distributed,enabled,icon_url,url,version,view_index)
```

```
VALUES ('appointmentlist', 1, 0, 0, NULL, NULL, 1, 101);
```

```
INSERT INTO application_modules
(id,is_distributed,enabled,icon_url,privilege_level,url,view_index,application
_id)
VALUES ('appointmentlist', 0, 0, NULL, 20, NULL, 0, 'appointmentlist');
```

```
INSERT INTO applications
(id,branch_app,is_distributed,enabled,icon_url,url,version,view_index)
VALUES ('appointmenthistoryaudit', 1, 0, 0, NULL, NULL, 1, 101);
```

```
INSERT INTO application_modules
(id,is_distributed,enabled,icon_url,privilege_level,url,view_index,application
_id)
VALUES ('appointmenthistoryaudit', 0, 0, NULL, 20, NULL, 0,
'appointmenthistoryaudit');
```

```
INSERT INTO applications
(id,branch_app,is_distributed,enabled,icon_url,url,version,view_index)
VALUES ('appointmentbookingclient', 1, 0, 0, NULL, NULL, 1, 101);
```

```
INSERT INTO application_modules
(id,is_distributed,enabled,icon_url,privilege_level,url,view_index,application
_id)
VALUES ('appointmentbookingclient', 0, 0, NULL, 20, NULL, 0,
'appointmentbookingclient');
```

4. Restart Orchestra Central.
5. Set up roles and user rights. See “1.3 Access rights” on page 3.

1.3 Access rights

Users of Appointment Booking need to be assigned to a role with the following access modules:

- Appointment
- Appointment Booking
- Calendar
- Connector Service Point

The following access modules are optional, depending on what the user should be able to do:

- Appointment Booking Client - for access to booking appointments
- Appointment Booking Administration - for access to changing the Appointment Booking settings
- Appointment List - for access to Appointment List
- Appointment History Audit - for access to Appointment History Audit

ⓘ A user assigned to a role with the access module Appointment Booking Administration can also use Appointment Booking, Appointment List, and Appointment History Audit.

2. Settings

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2.1 Configure general settings

To change the general settings, go to Settings  > General.

- **Auto close time (seconds)** - Configure after which time the application should automatically log out the user.
- **Allow create new customer** - Enable or disable the possibility to create a new customer.
- **Allow multi service selection** - Enable or disable the possibility to select more than one service for an appointment.
- **Allow all branches** - Check this box to enable appointment booking for all branches.
- **Allow multiple people per service** - Enable or disable the possibility to add multiple people per service
- **Duplicate services** - Check this box to add services according to the number of customers (for statistics reasons).
- **Max number of adults** - Configure max number of adults
- **Max number of children** - Configure max number of children. If set to 0, the children option won't be visible.
- **Max number of customers** - Configure how many customers that can be added to an appointment. Disabled if Allow multiple people per service is enabled.
- **Show resource** - Enable or disable showing the resource name.
- **Send appointment stat event** - Enable or disable sending stat event for appointment origin.
- **Apply system parameter date format** - Enable or disable using the date format from system parameters
- **Enable appointment history audit** - Enable or disable Appointment History Audit
- **Enable appointment list** - Enable or disable Appointment List

2.1.1 Change standard booking confirmation

In Appointment Booking, there is a standard booking confirmation that can be printed. It is possible to change the standard booking confirmation.

To change the booking confirmation:

- Go to Settings > General and enable **Show email template for printing**.

If enabled, the confirmation is retrieved from the email appointment confirmation set in Notification Admin. This means you can include for example a QR code, and also have booking confirmations in different languages.

ⓘ This setting requires that PS Notification 1.8 or later is installed.

2.2 Configure booking confirmation options

To configure notifications, go to Settings  > Notification Options

- **SMS** - Enable or disable option to send booking confirmation by SMS.
- **Email** - Enable or disable option to send booking confirmation by email.
- **Both Email and SMS** - Enable or disable option to send booking confirmation by both email and SMS.
- **No notification** - Enable or disable option to not send a booking confirmation.
- **Option preselected by default** - You can also select which of the enabled notification options should be preselected as default notification option.
- **Resend Confirmation** - Enable or disable the option to re-send booking confirmations.

2.3 Configure information fields

2.3.1 Title and notes

To configure title and notes fields, go to Settings  > Titles and notes

- **Title** - Enable or disable the Title field.
- **Notes** - Enable or disable the Notes field.

2.3.2 Add custom information

In some cases, you may want to send information about the appointment that is not part of the standard message to the customer.

To include information to customer, follow these steps:

1. Enable **Info to customer field** in the settings for Appointment Booking
 2. Go to Notification Admin, and add the parameter `{{custom.infoToCustomer}}` to the messages where you wish to include the custom information, for example in the appointment confirmation message.
- The parameter will be replaced by the text added in the field **Info to customer** in Appointment Booking.

 This setting requires that PS Notification 1.8 or later is installed.

2.4 Configure customer input fields

When adding a new customer, you can select which customer information the staff member can, or is required to, enter. First and last name is always required.

To configure which customer information fields to include, go to Settings  > Customer input fields.

The following customer information fields are available:

- First and last name
- Phone number and default country code
- Email
- Date of birth
- Language

ⓘ Make sure the wanted languages are added in Notification Admin.

2.5 Appointment List settings

To configure which columns to include in the appointment list, go to Settings  > Appointment List Settings.

The following options are available:

- Date
- Start
- End
- First Name
- Last Name
- Resource
- Notes/Conf
- Services
- Email
- Phone Number
- Updated
- Status
- Date of birth

3. Using Appointment Booking

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3.1 Introduction

Appointment Booking provides an efficient way to book and manage appointments.

With Appointment Booking, you can:

- Create appointments
- Edit appointments
- Remove appointments
- Create customers
- Edit customers

ⓘ Depending on the settings, your system may look different than it does in this guide. In this guide we will go through all available features.

3.2 Overview

Click the **Appointment Booking** icon on the Orchestra home page to open the application. The page displayed is the flow where the bookings are made.

The screenshot shows the 'Appointment booking' interface. At the top, there's a header with the QMATIC logo, the title 'Appointment booking', and user information 'Super Administrator'. Below the header is a search bar labeled 'Select customer' and a 'Confirm' button. The main section is titled 'Create appointment' and contains several input fields: 'Filter services' (with a dropdown arrow), 'Filter branches' (with a dropdown arrow), 'Filter date' (with a dropdown arrow), and 'Time' (with a dropdown arrow). The 'Services' dropdown is expanded, showing a list of services: 'Accounts Check', 'Accounts Creation', 'Cash Withdrawal', 'Cheque Deposit', and 'Consultancy'. The 'Time' dropdown is also expanded, showing a list of times: '08', '12', '16', and '20'. To the right of these fields is an 'Information' section with 'Notify customer by' (radio buttons for 'Email' and 'SMS'), 'Title' (with a text input field and 'Optional' label), 'Notes' (with a text input field and 'Optional' label), and a 'Print customer copy' checkbox. At the bottom of the interface, there is a small footer text: 'Powered by QMATIC Orchestra 7.2 (4.2.0.889) %APP_VERSION% Licensed to Final test Qmatic Show'.

In the top of the landing page, you have a top banner where you have the following options:

-  Go to the Orchestra home page.
-  Launch the online help
-  Log out

3.3 Quick guide – create an appointment

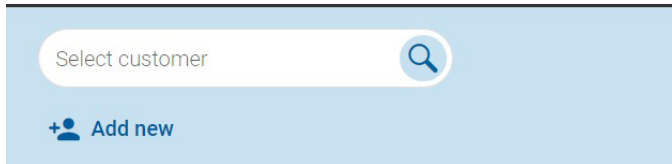
An appointment is created in the following way:

1. Select a customer and one or several service(s)
2. (Select number of customers)
3. Select a branch
4. Select a date and a time
5. Select a notification method
6. Optionally, add a title to the appointment
7. Optionally, add notes to the appointment
8. Optionally, add info to customer
9. Optionally select to print a customer copy
10. Confirm

In the remaining sections we will describe the procedures in more detail.

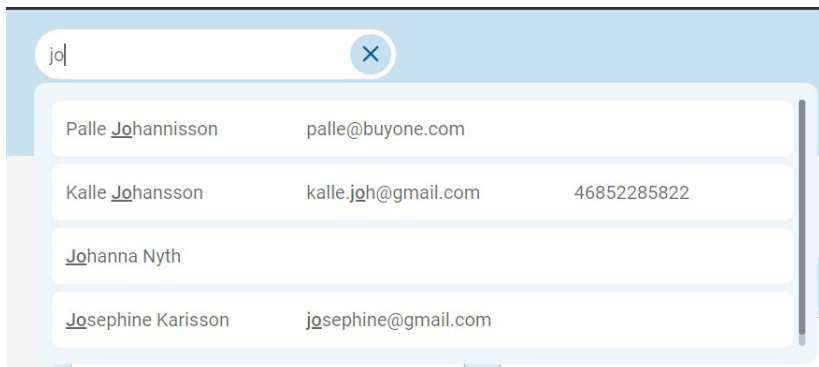
3.4 Select a customer

Before a customer has been found, the upper area of the landing page looks like this:



A light blue rectangular box containing a search interface. At the top is a white search input field with the placeholder text "Select customer" and a magnifying glass icon on the right. Below the input field is a blue button with a white plus icon and the text "Add new".

To search for a customer, start typing in the search field. Once two letters have been entered, the system starts to search for customers. You can search for name, phone number, or email, or a combination of them.



A screenshot of the search results interface. At the top is a search input field containing the text "jo" and a close button (X). Below the input field is a list of four customer entries, each in a light blue box. The first entry shows "Palle Johannisson" and "palle@buyone.com". The second entry shows "Kalle Johansson", "kalle.joh@gmail.com", and "46852285822". The third entry shows "Johanna Nyth". The fourth entry shows "Josephine Karisson" and "josephine@gmail.com". A vertical scrollbar is visible on the right side of the list.

Select a customer from the search result. Once you have found a customer, the upper left area will look like this:

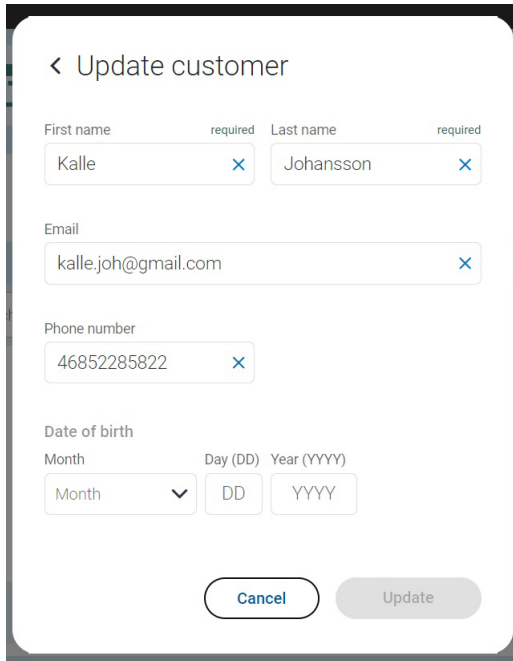


A light blue rectangular box representing a selected customer. At the top left is a blue person icon followed by the text "Kalle Johansson". At the top right is a blue close button (X). Below this, there are two contact details: a phone icon followed by "46852285822" and an email icon followed by "kalle.joh@gmail.com".

If you want to remove the customer from the appointment and go back to the customer search, click **Clear & search**.

3.5 Edit a customer

To update the customer information, you first have to find the customer. Then click on the pencil icon next to the customer. The Update customer window is opened:



The screenshot shows a mobile application window titled "< Update customer". The form contains the following fields:

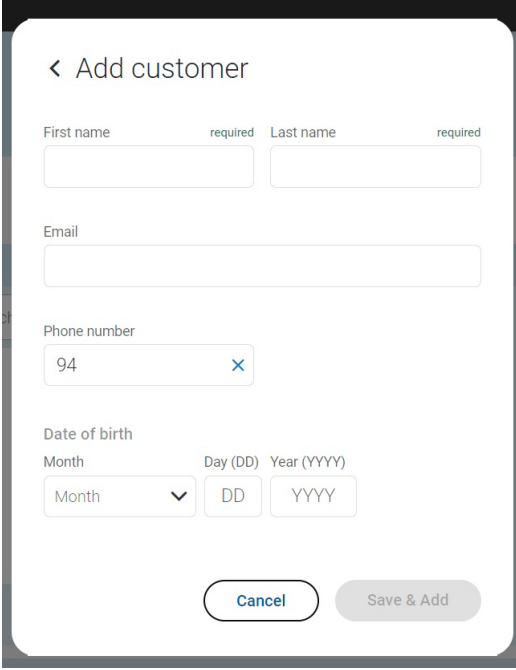
- First name** (required): Input field with "Kalle" and a blue 'X' icon.
- Last name** (required): Input field with "Johansson" and a blue 'X' icon.
- Email**: Input field with "kalle.joh@gmail.com" and a blue 'X' icon.
- Phone number**: Input field with "46852285822" and a blue 'X' icon.
- Date of birth**: A group of three input fields: "Month" (a dropdown menu showing "Month" with a downward arrow), "Day (DD)" (input field with "DD"), and "Year (YYYY)" (input field with "YYYY").

At the bottom of the form are two buttons: a blue "Cancel" button and a grey "Update" button.

Here, you can update any information that has been registered about the customer. When done, click **Update**.

3.6 Adding a new customer

If you want to add a new customer, click **New customer** . The Add customer window is opened:



The screenshot shows a mobile application window titled "Add customer" with a back arrow icon. The form contains the following fields and controls:

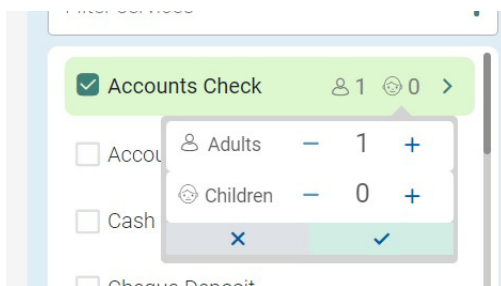
- First name** (required): A text input field.
- Last name** (required): A text input field.
- Email**: A text input field.
- Phone number**: A text input field containing "94" and a blue "X" icon for clearing the field.
- Date of birth**: A section with three sub-fields:
 - Month**: A dropdown menu showing "Month" and a downward arrow.
 - Day (DD)**: A text input field showing "DD".
 - Year (YYYY)**: A text input field showing "YYYY".
- Buttons**: At the bottom, there is a blue "Cancel" button and a grey "Save & Add" button.

Enter the applicable information, select a notification language, then click **Save & Add** to save the customer and add him/her to the appointment.

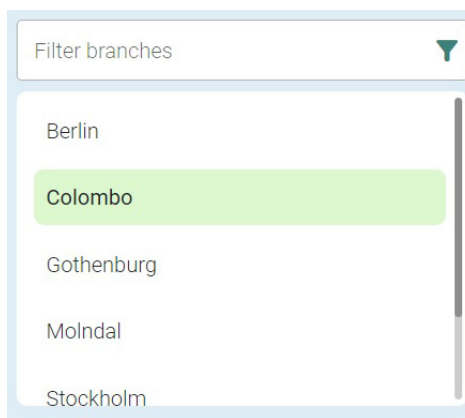
3.7 Create an appointment

To book an appointment, follow these steps:

1. We recommend that you start by finding or adding a customer. It is, however, also possible to add the customer at any time during the process.
2. Search for, or select, one or several services from the list:

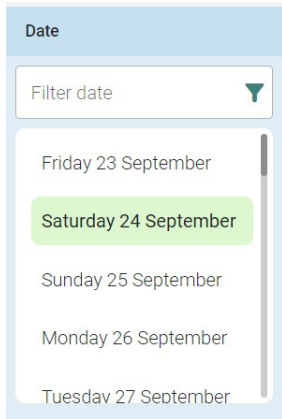


3. Select the wanted number of adults and children per service (if applicable):
4. Search for, or select the wanted branch from the list:



The address of the selected branch should be displayed below the list.

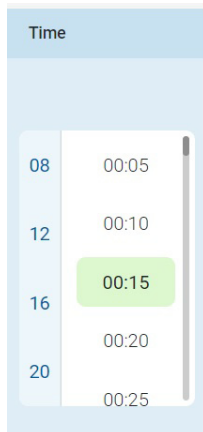
5. Select the wanted date:



The image shows a date selection interface. At the top, there is a header labeled "Date". Below it is a search bar with the placeholder text "Filter date" and a funnel icon. A list of dates is displayed below the search bar, with "Saturday 24 September" highlighted in green. The dates listed are Friday 23 September, Saturday 24 September, Sunday 25 September, Monday 26 September, and Tuesday 27 September. A vertical scrollbar is visible on the right side of the date list.

Depending on how your system is configured, the resource may be shown beneath the list, once a time has been selected.

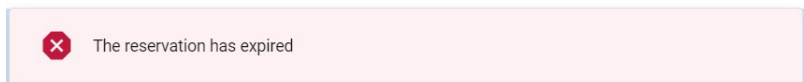
6. Select the wanted time:



The image shows a time selection interface. At the top, there is a header labeled "Time". Below it is a list of time slots. On the left side of the list, there are hour markers: 08, 12, 16, and 20. The time slot "16:00:15" is highlighted in green. Other time slots visible are 00:05, 00:10, 00:20, and 00:25. A vertical scrollbar is visible on the right side of the time slot list.

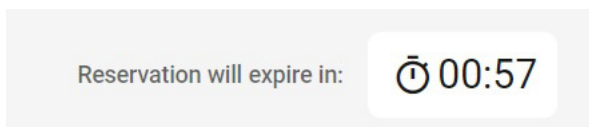
It is possible to jump to a specific part of the day by clicking on the hours on the side.

If you select a time slot that is no longer available, you will be notified about that:

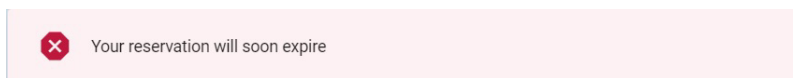


The image shows a notification banner with a red background. On the left, there is a red circle with a white 'X' icon. To the right of the icon, the text "The reservation has expired" is displayed.

As soon as you select a time slot, a timer will start to count down until the reservation has expired:



When the reservation is about to expire, you will be notified:



7. Select the wanted notification method:

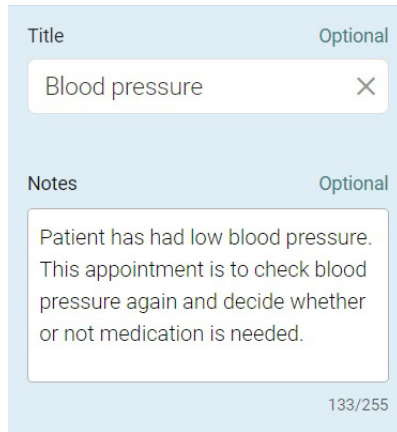
A light blue rectangular form with a header "Information". Below it, the text "Notify customer by" is followed by four radio button options: "Email", "SMS", "SMS + Email", and "No notification".

8. If you select for example SMS, and there is no phone number entered for the customer, a popup window is displayed:

A white rounded rectangular popup window with a dark gray border. The title is "Please add phone and email to enable notification". It contains two input fields: "Phone number" (with "94" entered) and "Email address", both marked as "required". Below these is a checkbox labeled "Save to customer object". At the bottom are two buttons: "Cancel" and "Save & finish". A date "Tuesday 04 October" is visible at the very bottom of the screen.

Here, you have the possibility to add a phone number and/or email address, which either can be used temporarily, or saved to the customer object

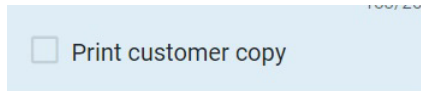
9. Optionally, enter a title and a note for the appointment:



The screenshot shows a light blue form with two sections. The first section is labeled 'Title' on the left and 'Optional' on the right. It contains a text input field with the text 'Blood pressure' and a small 'X' icon to its right. The second section is labeled 'Notes' on the left and 'Optional' on the right. It contains a larger text area with the text: 'Patient has had low blood pressure. This appointment is to check blood pressure again and decide whether or not medication is needed.' At the bottom right of the form, the text '133/255' is visible.

10. Optionally, enter extra information to the customer that will be included in the appointment confirmation.

11. If you want to print a customer copy, select the following check box:



The screenshot shows a light blue rectangular box containing a single checkbox. To the right of the checkbox is the text 'Print customer copy'.

12. A print preview will be displayed, after you have clicked **Confirm** in the next step:

×

Appointment confirmation

Kalle Johansson
📞 46852285822
✉ kalle.joh@gmail.com

Appointment overview

Date	Friday 30 September
Time	11:20 - 11:21
Service	Accounts Creation
Branch	Berlin
Resource	Resource1

Thanks for booking an appointment with us! We are looking forward to meeting you.

[Close](#) [Print](#)

13. Here, you can click **Close** to return to the booking page, or **Print** to print the confirmation.

⚠ You can always click **Clear all** to clear everything that has been entered so far and start afresh. You will be asked to confirm:

Are you sure you want to clear the customer and all the settings for the appointment?

[Cancel](#) [Yes](#)

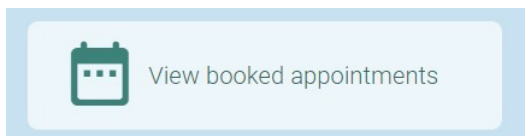
Date

14. When you have filled in all appointment details, click **Confirm**.

3.8 Cancel or reschedule an appointment

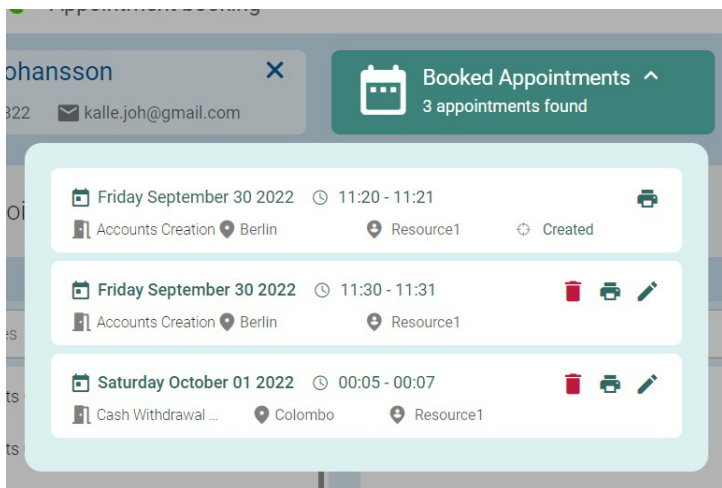
To cancel, reschedule or in some way edit an appointment, start by finding the customer that the appointment was booked for, see “3.4 Select a customer” on page 15.

Once the customer has been found, click **View booked appointments**:



It is also possible to find the Appointment in the Recently booked list, see “3.10 View recently booked appointments” on page 26.

The customer’s appointments, both in the past and in the future, will be displayed to the right of the customer name area:



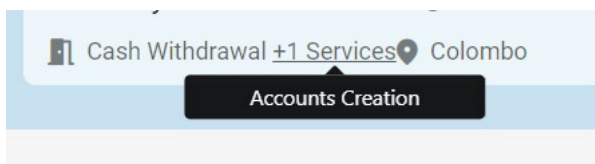
For appointments in the past, marked with status Done or Missed, you can only print the appointment details. Future appointments can be canceled, edited, and/or you can print the appointment details. These procedures are described in more detail below.

To cancel an appointment, click **Cancel**  next to that appointment.

You will be asked to confirm the cancellation.

To reschedule, or in some other way edit (change service or branch) an appointment, please follow these steps:

1. Click the Edit icon  next to the appointment in the list.
2. The details of the selected appointment will be displayed at the top of the landing page. If the appointment is multi-service, you can hover over the service link to see additional services included in the appointment:



The current appointment details are highlighted in the Edit appointment card:

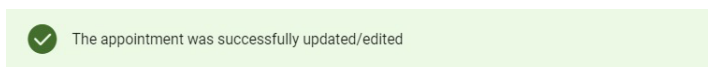
Change appointment

Services	Branches	Date	Time	Information
Filter services ☐ Accounts Check ☒ Accounts Creation   ☒ Cash Withdrawal   ☐ Cheque Deposit ☐ Consultancy ☐ Credit/Debit Cards	Filter branches Berlin Colombo Gothenburg Molndal Stockholm test branch name for too long text with number of letters and characters	Filter date Saturday 01 October Sunday 02 October Monday 03 October Tuesday 04 October Wednesday 05 October Thursday 06 October	08 00:05 12 00:10 12 00:15 16 00:20 20 00:25 20 00:30	Notify customer by ☒ Email ☐ SMS ☐ SMS + Email ☐ No notification Title Optional Write a title for the visit Notes Optional Add notes ☐ Print customer copy

It is possible to cancel the procedure at any time. In that case, the appointment that you were editing will stay the same as before you started.

3. Edit the details of the appointment, then click **Confirm changes**, to save the updated appointment.

You will get a confirmation that the old appointment was canceled and the new appointment was successfully created:



⚠ There are cases when you cannot edit an appointment. If your system configuration has changed, for example if services have been removed, you get a message saying that appointments cannot be edited due to system changes.

3.9 Print appointment details

To print the appointment details of a previously booked appointment, you first have to find the appointment. Then click **Print**,  , on the appointment card, in the list of found appointments, or list of recently booked appointments. The appointment confirmation window will be displayed:

×

Appointment confirmation

Kalle Johansson
 46852285822
 kalle.joh@gmail.com

Appointment overview

Date	Friday 30 September
Time	11:20 - 11:21
Service	Accounts Creation
Branch	Berlin
Resource	Resource1

Thanks for booking an appointment with us! We are looking forward to meeting you.

ClosePrint

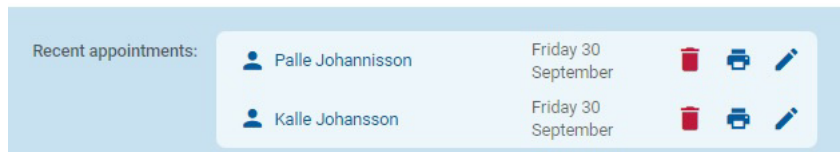
Here, you can see all the details of the appointment. The appointment confirmation shown in the screenshot is the standard appointment confirmation. However, it is also possible to use a custom appointment confirmation.

Click **Print** to print the confirmation.

Click **Close** to return to the Appointment booking application.

3.10 View recently booked appointments

As soon as you have started to book appointments, you will be able to see the most recently booked appointments at the top of the landing page:



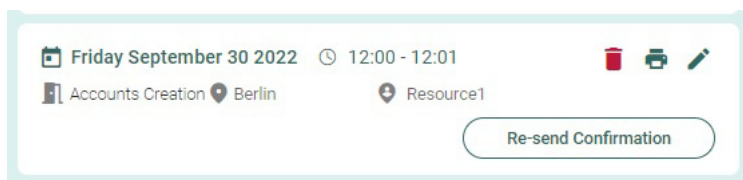
Here, you have the option to edit, cancel and print them, without having to find them first.

Appointments that have recently been canceled have the following icon:



3.11 Resend booking confirmation

1. Find the customer you want to resend the booking confirmation to, either by searching for the customer or using the list of recent appointments.
2. Click **View booked appointments**
3. Find the appointment and click **Re-send Confirmation**.



3.12 Using Appointment List

! Appointment List requires a specific access module.

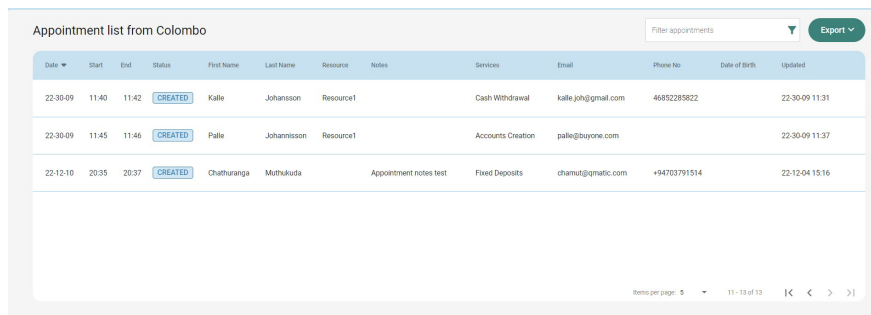
Appointment List is a part of Appointment Booking where you can see all appointments for a branch during a selected time period.

To open Appointment List, click on the list icon in the top right corner of Appointment Booking.



3.12.1 List appointments

Select a branch and a date range and click **Show**.

The screenshot shows a web application interface for viewing appointments. At the top, it says "Appointment list from Colombo". There is a search bar labeled "Filter appointments" and an "Export" button. Below this is a table with columns: Date, Start, End, Status, First Name, Last Name, Resource, Notes, Services, Email, Phone No, Date of birth, and Updated. The table contains three rows of appointment data. The first row shows an appointment on 22-30-09 from 11:40 to 11:42, status "CREATED", for Kalle Johansson at Resource1, service "Cash Withdrawal", email "kalle.joh@gmail.com", phone "46852285822", and updated on 22-30-09 11:31. The second row shows an appointment on 22-30-09 from 11:45 to 11:46, status "CREATED", for Palle Johansson at Resource1, service "Accounts Creation", email "palle@qmatic.com", and updated on 22-30-09 11:37. The third row shows an appointment on 22-12-10 from 20:35 to 20:37, status "CREATED", for Chathuranga Muthukuda, notes "Appointment notes test", service "Fixed Deposits", email "chamut@qmatic.com", phone "+94703791514", and updated on 22-12-04 15:16. At the bottom right, it says "Items per page: 5" and "11 - 13 of 13" with navigation arrows.

Date	Start	End	Status	First Name	Last Name	Resource	Notes	Services	Email	Phone No	Date of birth	Updated
22-30-09	11:40	11:42	CREATED	Kalle	Johansson	Resource1		Cash Withdrawal	kalle.joh@gmail.com	46852285822		22-30-09 11:31
22-30-09	11:45	11:46	CREATED	Palle	Johansson	Resource1		Accounts Creation	palle@qmatic.com			22-30-09 11:37
22-12-10	20:35	20:37	CREATED	Chathuranga	Muthukuda		Appointment notes test	Fixed Deposits	chamut@qmatic.com	+94703791514		22-12-04 15:16

The following information is shown:

- Date
- Start
- End
- Status - can be created, arrived, complete.
- First name
- Last name
- Resource
- Notes
- Services
- Email
- Phone number
- Date of birth
- Updated

To change the sorting order of the list, use the arrows next to the columns.

3.12.2 Export list

- To export the list, click **PDF** or **XLS** in the top right corner. A file will be downloaded.

⚠ If you have filtered the list of appointments, only appointments included in the filter are exported.

⚠ If you have a large number of appointment (over 1000), you may have to wait a few minutes before you can export the list.

3.13 Using Appointment History Audit

⚠ Appointment History Audit requires a specific access module.

Appointment History Audit is a part of Appointment Booking where you can search for a customer and see all details about the appointments related to that customer.

Note that some details are not available past retention policy limit or if a visit has not ended yet.

To open Appointment History Audit, click on the clock icon in the top right corner of Appointment Booking.



Find a customer by searching for name, phone number, email address, or a combination of them.



The results will show all appointments related to that customer.

Action Time	Operation	Appt Id	Start Time	End Time	Branch	Resource	Services	Title	Notes	User
22-30-09 11:38	UPDATE	2752	22-30-09 12:00	22-30-09 12:01	Berlin	Resource1	Accounts Creation			superadmin
22-30-09 11:31	UPDATE	2749	22-30-09 11:40	22-30-09 11:42	Colombo	Resource1	Cash Withdrawal, Accounts Creation			superadmin
22-30-09 11:21	CREATE	2748	22-30-09 11:30	22-30-09 11:31	Berlin	Resource1	Accounts Creation			superadmin
22-30-09 11:18	CREATE	2747	22-30-09 11:20	22-30-09 11:21	Berlin	Resource1	Accounts Creation			superadmin

Items per page: 5 1 - 4 of 4 < > >>

The following information is shown:

- Action time - when the operation was performed
- Operation - can be CREATE, UPDATE or DELETE.
- Appt Id - Appointment Id
- Start time
- End time
- Branch
- Resource
- Services
- Title
- Notes
- User - user who performed the operation

To expand an entry, click on the arrow at the end of a line.



This opens the appointment change log, where the you can see all the history for the appointment since it was created.

22-30-09 11:31	UPDATE	2749	22-30-09 11:40	22-30-09 11:42	Colombo	Resource1	Cash Withdrawal, Accounts Creation	superadmin	^
Action Time	Operation	Start Time	End Time	Resource	Services	Title	Notes	User	
22-30-09 11:21	CREATE	22-01-10 00:05	22-01-10 00:07	Resource1	Cash Withdrawal, Accounts Creation			superadmin	

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