Appointment Settings

Configure Customer Appointment Settings

1. Select **Appointments** > **Configuratio**n... > **Settings**

2. Click the **Edit** button.

3. Use the drop-down menu to choose which colors and icons to show for each appointment based on the appointment type and status

   1. **Use system default colors and icons based on the appointment status:**Use the CollaborateMD standard configuration for both the Appointment Statuses and Types. This option is static and the icons and colors cannot be changed.

   2. **Use custom colors for appointment types and icons for appointment statuses:**Use the custom colors from the appointment types and the icons from the appointment status. This option allow you to change the icons and colors by clicking on the color or icons for the appt type or status you would like to change.

      > ✨ Want to control the order your appointment types and statuses are shown within the scheduler? Use the ︿ ﹀ arrows to change the order they will display.

   3. **Use custom icons for appointment types and colors for appointment statuses:**Use the custom icons from the appointment types and the colors from the appointment status. This option allow you to change the icons and colors by clicking on the color or icons for the appt type or status you would like to change.

      > ✨ Want to control the order your appointment types and statuses are shown within the scheduler? Use the ︿ ﹀ arrows to change the order they will display.

Configure User Appointment Settings

1. *Optional*: Click the **Copy Settings link** to copy customer appointment settings to another customer under your account.

2. **Show warning when saving a new appointment that is a duplicate of an already entered appointment on the patient, date, and resource?**

1. If set to **Yes**, an alert will pop up if you are creating a duplicate appointment based on the date, patient and resource entered.

3. **Allowing appointments to be scheduled for a Resource outside of their default hours?**

   1. If set to **Yes**, you will be able to schedule appointments for resources during the hours they are marked as Unavailable.

4. **Allow multiple appointments to be scheduled during the same time block (overbooking)?**

   1. If set to **Yes**, you will be able to schedule multiple appointments at the same time for the same resource.

5. **Show instructions when moving appointments, rescheduling appointments, or scheduling a follow-up appointment?**

   1. If set to **Yes**, a window will appear with instructions every time you select to reschedule an appointment or schedule a follow-up appointment.

6. **Choose the duration between grid lines (i.e., time slot) for your calendar view.**

   1. Use the drop-down menu to divide your scheduler to display into 5, 10, 15, 30, 60 minute increments.

7. **Choose the start and end times for your calendar view.**

   1. Use this option to set the hours of the day to display on your scheduler.

8. **Do not show resource within the daily view if they are unavailable for the entire day?**

   1. If set to **Yes**, you will not see the resource column for resources within the daily view if all of their available time slots are booked.

9. **Show a separate time legend next to each resource within the daily view? By default, only a single time legend is shown to the left of the first resource?**

   1. If set to **Yes**, the time interval legend will appear to the left of each resource column.

10. **Choose the number of days per week to show within the weekly view.**

    1. Use the drop-down menu to select **how many days should be shown on the scheduler within the weekly view.**

11. **Choose the day of the week to show first within the weekly view.**

    1. Use the drop-down menu to select **which day the weekly view of the scheduler should begin on**

12. **Show a warning when opening a past appointment.**

    1. If set to **Yes**, an alert will appear when opening an appointment with a date in the past.

13. **Prompt me to schedule requests from the waiting list when:**

    1. Moving an appointment.
    2. Deleting, Canceling or Rescheduling an appointment.

14. **Enable drag-and-drop in the scheduler:**

    1. If set to **Yes**, you can use the drag and drop capability to move appointments within the scheduler.

15. **Hide the status of Intake Forms on the scheduler when intake forms have been received and applied?:**

    1. If set to **Yes**, the checkmark that appears for forms that have been applied will be hidden and will not occupy space in the appointment box.

16. Click **Save**.