

Configure User Appointment Settings

† Modified on 02/04/2025 11:32 am EST

- 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 schedule

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.**
