

# Appointments: Creation and Registration

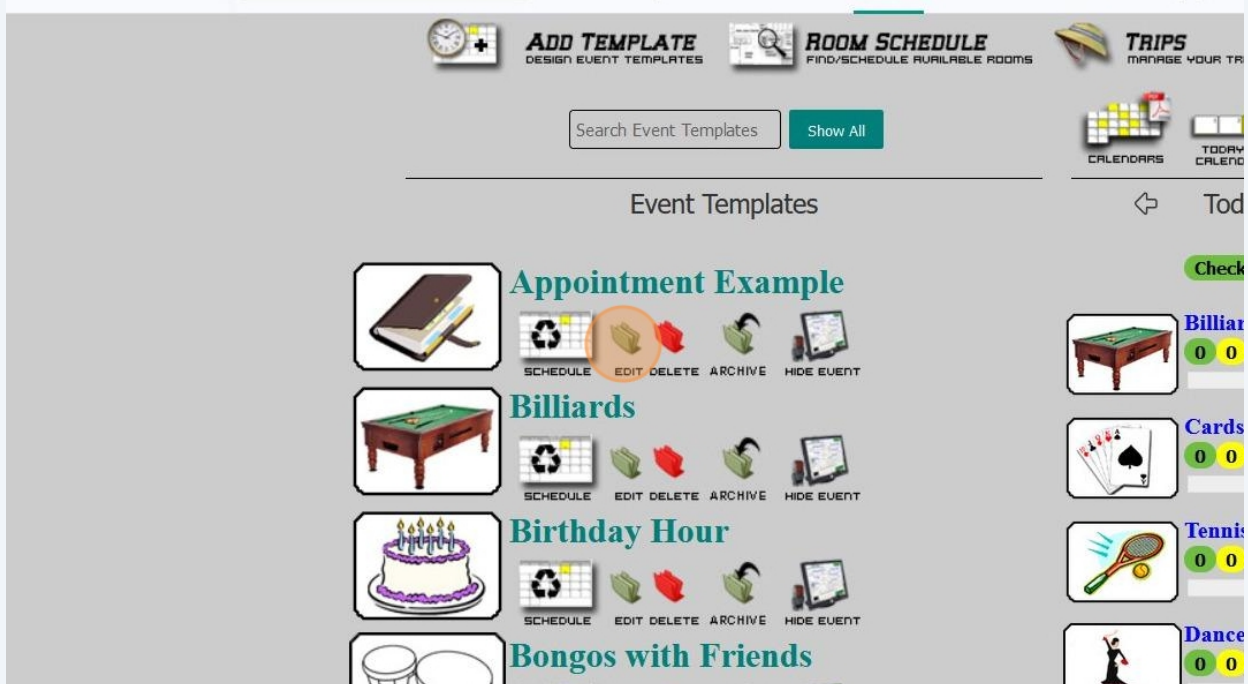


How to setup your events with various time slots people may register to, and how to register people to them.

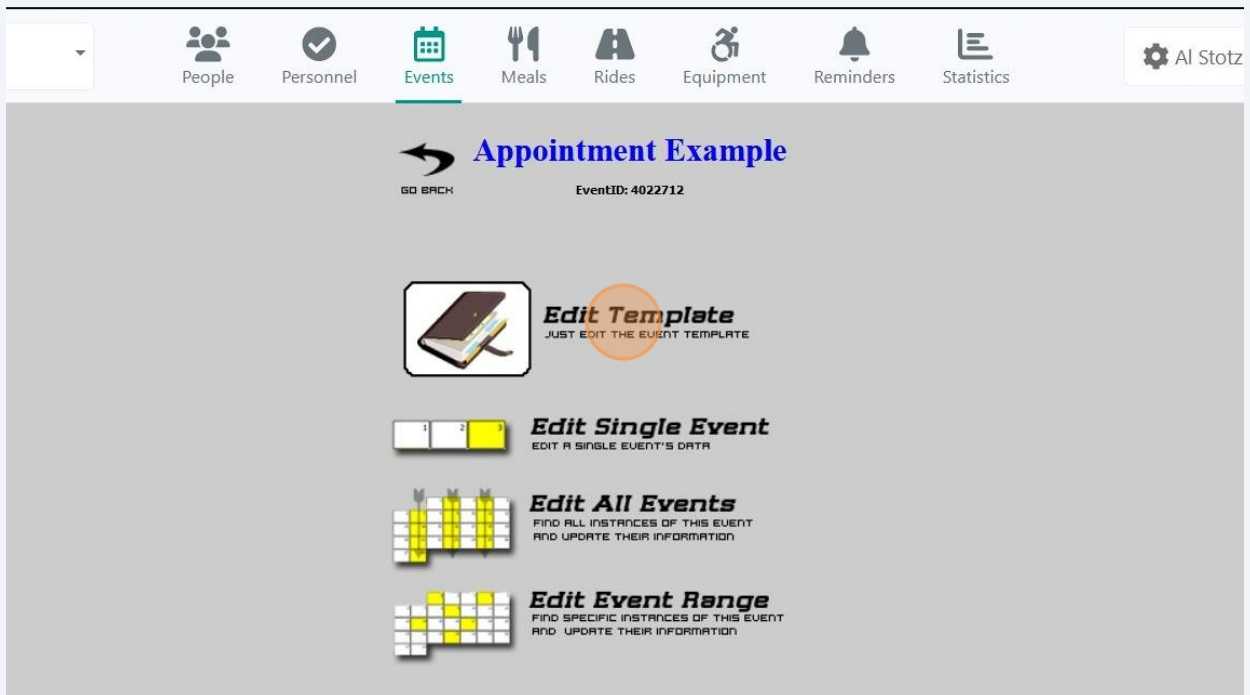
## Appointment Setup

1

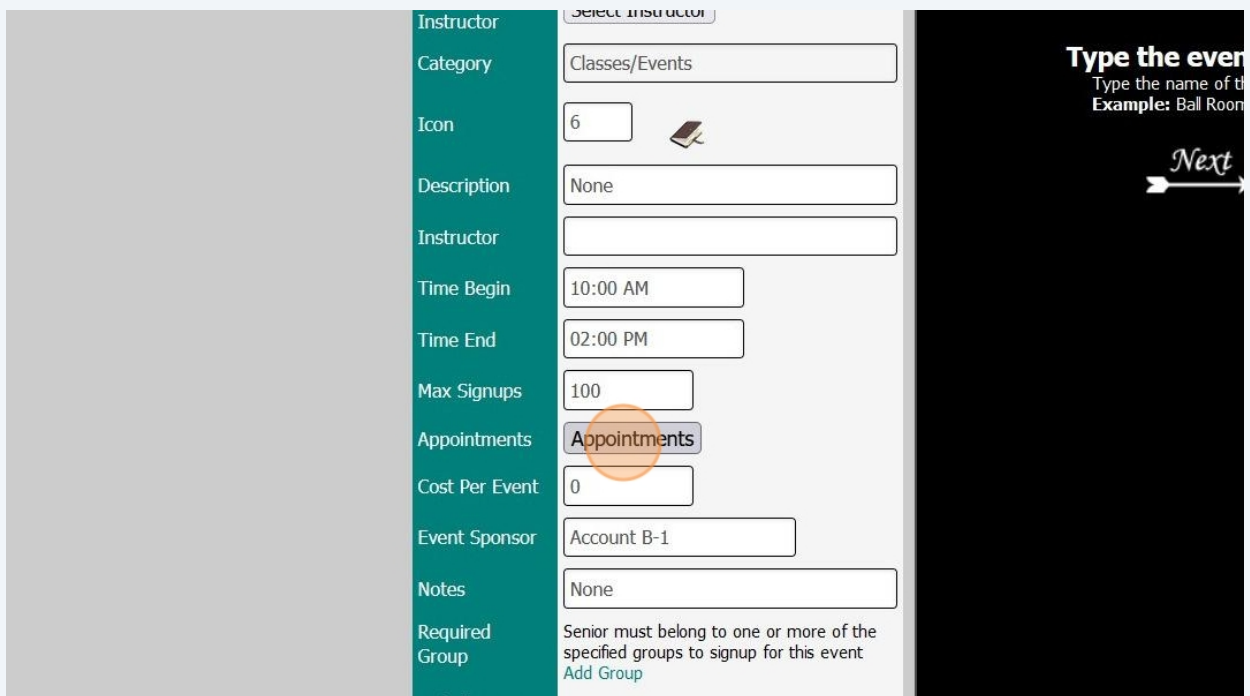
In order to create an event containing appointment slots, you must first have [created the Template for the event](#). Once that's created, in your event template list, find the activity you wish to turn into an appointment activity and click 'Edit'.



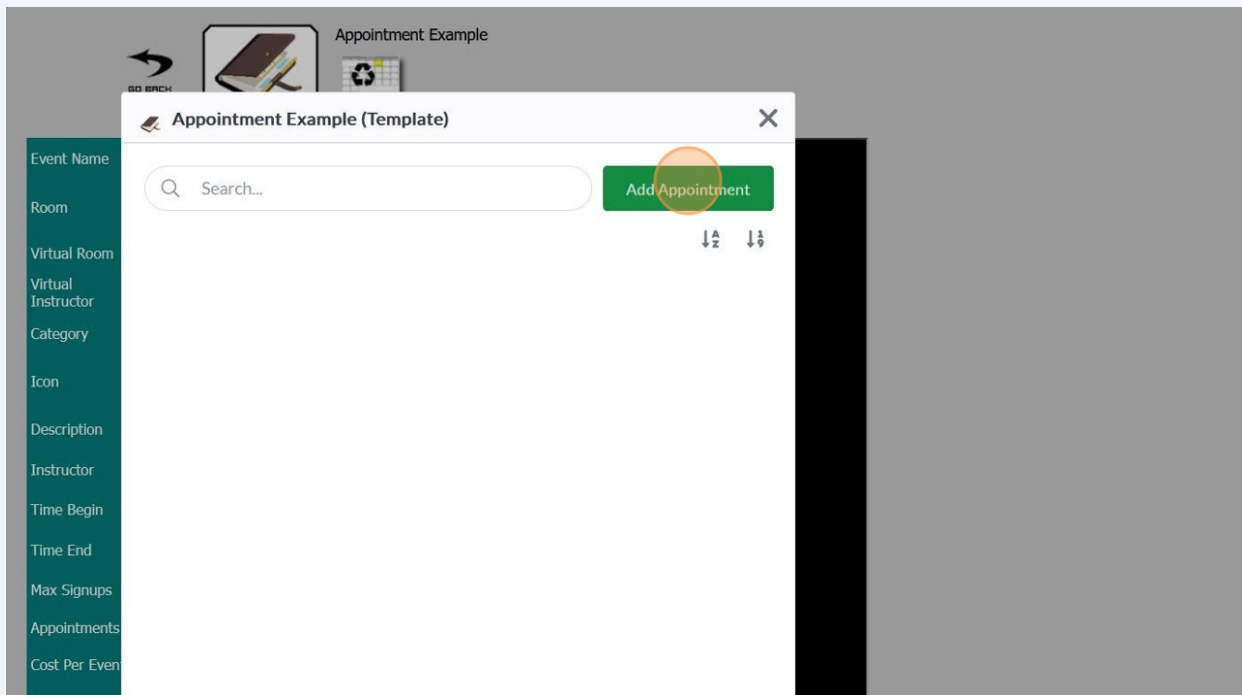
2 Then choose 'Edit Template'.



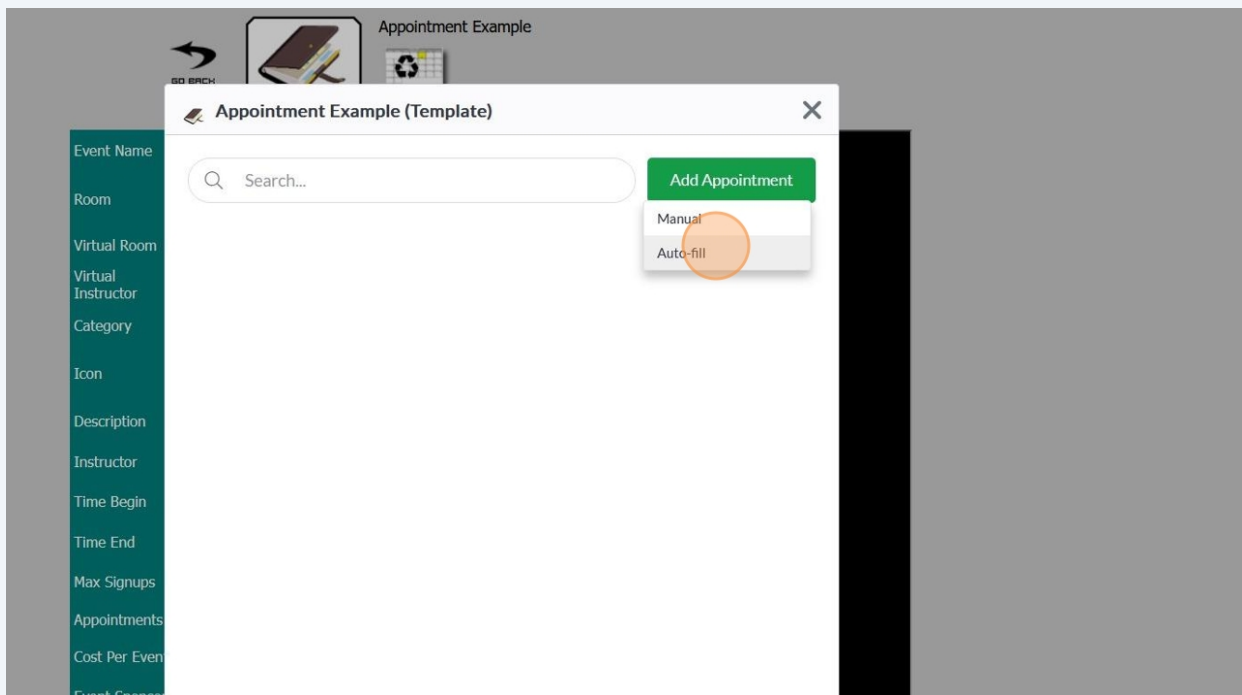
3 Find and click the 'Appointments' button.



- 4 This will open a new popup. Within it, click "Add Appointment"



- 5 Here you have two options:  
"Auto-Fill" will allow you to quickly make evenly-spaced appointments that occur between the start and end times of the activity. You can adjust the length of time and quantity of people allowed per appointment slot.  
"Manual" will instead let you enter in each of these details one at a time.  
For most people, Auto-fill is the way to go, so we'll select that.



6

After selecting "Auto-Fill", you'll be brought to a screen where you can adjust the number of seats per time-slot, the start and end times the slots should be created in-between, and the length of each appointment.

A screenshot of a web application's appointment settings form. On the left is a dark teal sidebar with a list of settings: Room, Virtual Room, Virtual Instructor, Category, Icon, Description, Instructor, Time Begin, Time End, Max Signups, Appointments, Cost Per Event, Event Sponsor, Notes, and Required. The main content area is white and contains the following fields: 'Number of seat(s) per appointment\*' with a dropdown menu showing '1'; 'Start time\*' and 'End time\*' dropdown menus showing '10:00 AM' and '2:00 PM' respectively; 'Appointment duration\*' with a dropdown menu showing '30' and a unit dropdown menu showing 'Minutes'; and 'Seats to be created' with a list of time slots: '10:00 AM', '10:30 AM', '11:00 AM', '11:30 AM', '12:00 PM', '12:30 PM', '1:00 PM', and '1:30 PM'.

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I'll set my seats per appointment to 3, and the appointment duration to 60. This will give me four 1-hour appointment slots between 10AM and 2PM which have a capacity of 3 people per slot. I'll click 'Submit' to finalize.

A screenshot of the same appointment settings form as in the previous image, but with updated values. The 'Number of seat(s) per appointment\*' dropdown is now set to '3' and is highlighted with a yellow background. The 'Appointment duration\*' dropdown is now set to '60' and is also highlighted with a yellow background. The 'Seats to be created' list now only shows four slots: '10:00 AM', '11:00 AM', '12:00 PM', and '1:00 PM'. At the bottom of the form, there are two buttons: a 'Cancel' button and a green 'Submit' button, which is circled in orange.



Please note: The activity's normal Max Signups is still obeyed when considering an activity's max total capacity. Generally, you'll want the Template's Max Signups to equal your seats-per-appointment multiplied by the amount of appointments. (Using the above example, we have 4 appointments at 3 seats each, giving us 12 total capacity.)



By clicking the little 'Pencil on Paper' icon (shown in the next image) You may edit any/all of the slots to adjust their seats, times, or give them a unique name.

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If you have these events already scheduled on the calendar, then we need to select 'Override scheduled events' to update those to include this new appointment information. If the activity is not yet scheduled, then you can skip this step (although there's no harm in doing it anyway). I'll select 'Override scheduled events'.

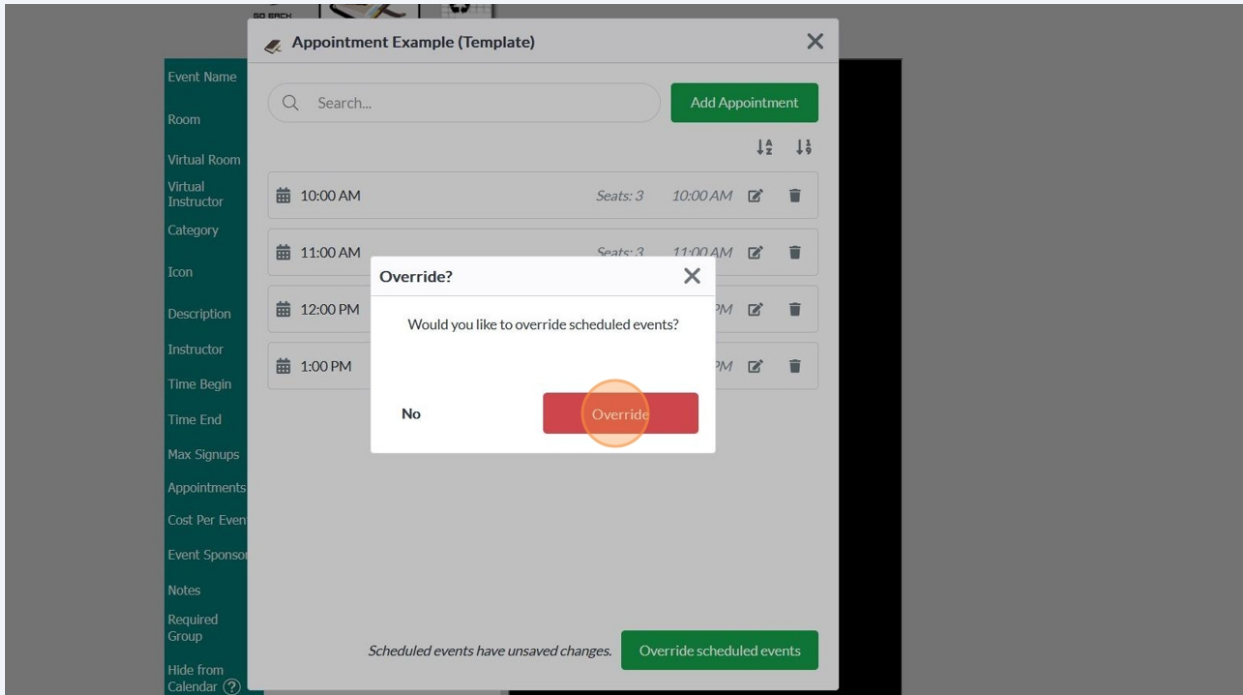
The screenshot shows a software interface for managing appointments. On the left is a dark teal sidebar with a list of fields: Room, Virtual Room, Instructor, Category, Icon, Description, Instructor, Time Begin, Time End, Max Signups, Appointments, Cost Per Event, Event Sponsor, Notes, Required Group, and Hide from Calendar. The main area displays a table of appointments:

Time	Seats	Time	Actions
10:00 AM	3	10:00 AM	[Pencil icon] [Trash icon]
11:00 AM	3	11:00 AM	[Pencil icon] [Trash icon]
12:00 PM	3	12:00 PM	[Pencil icon] [Trash icon]
1:00 PM	3	1:00 PM	[Pencil icon] [Trash icon]

At the bottom of the interface, there is a message: "Scheduled events have unsaved changes." and a green button labeled "Override scheduled events". The button is circled in orange in the image.

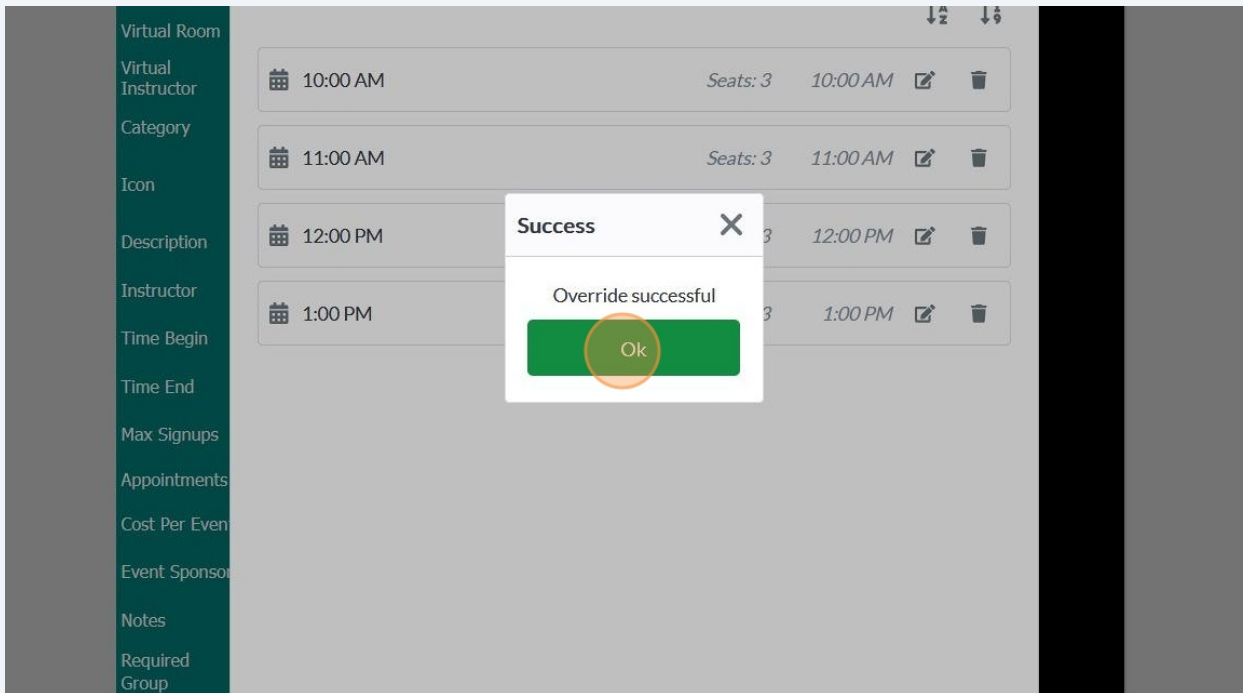
9

This will provide you a confirmation screen where you can choose 'Override' to update all of this activity's scheduled dates.



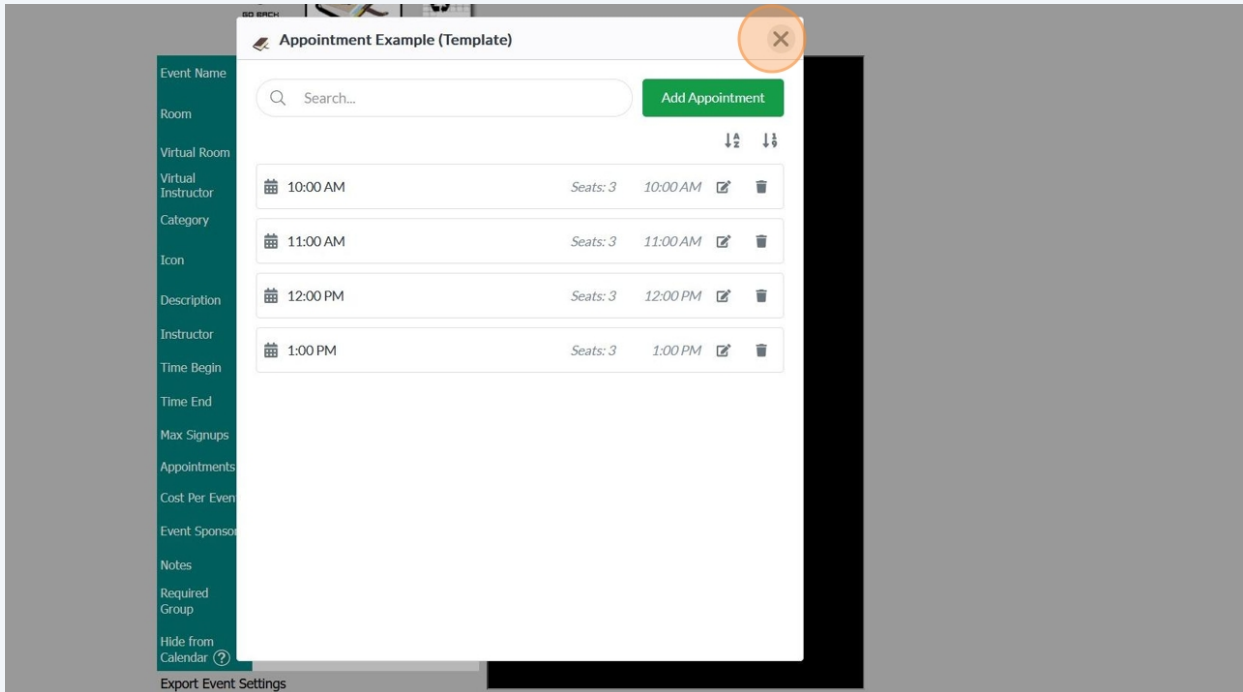
10

Great! Click 'OK' to proceed.



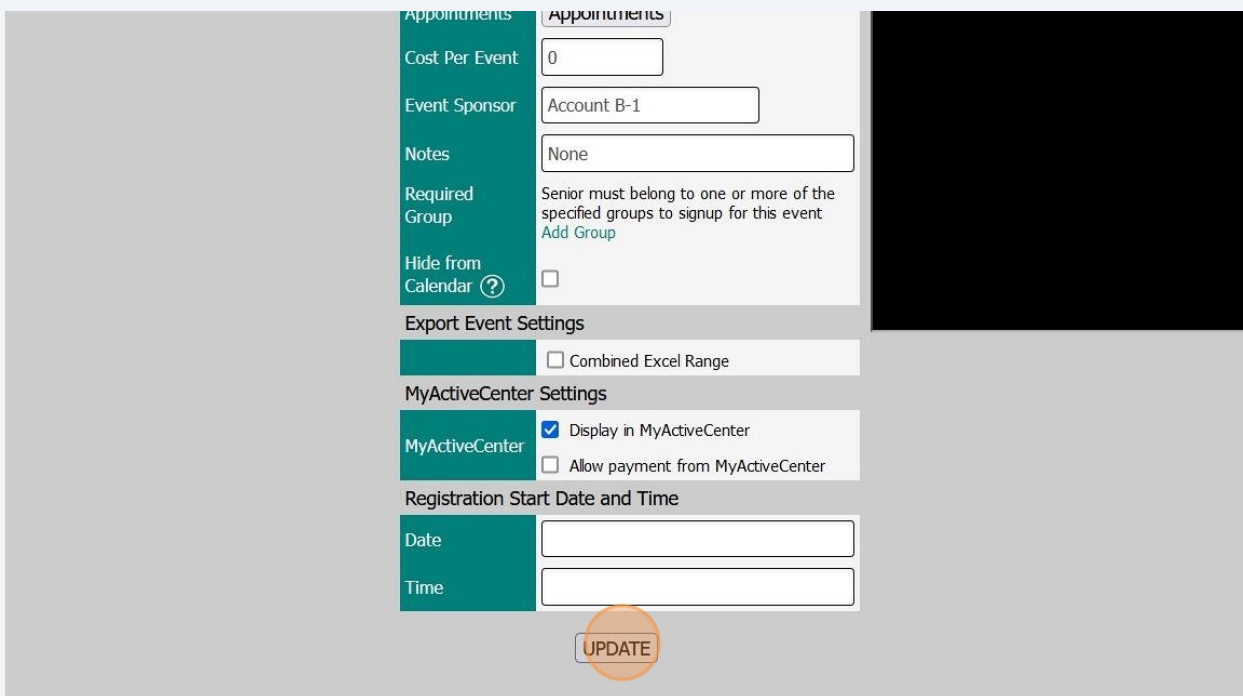
11

Now that we're done setting up our appointments, you may click the **X** to close the appointment management window.



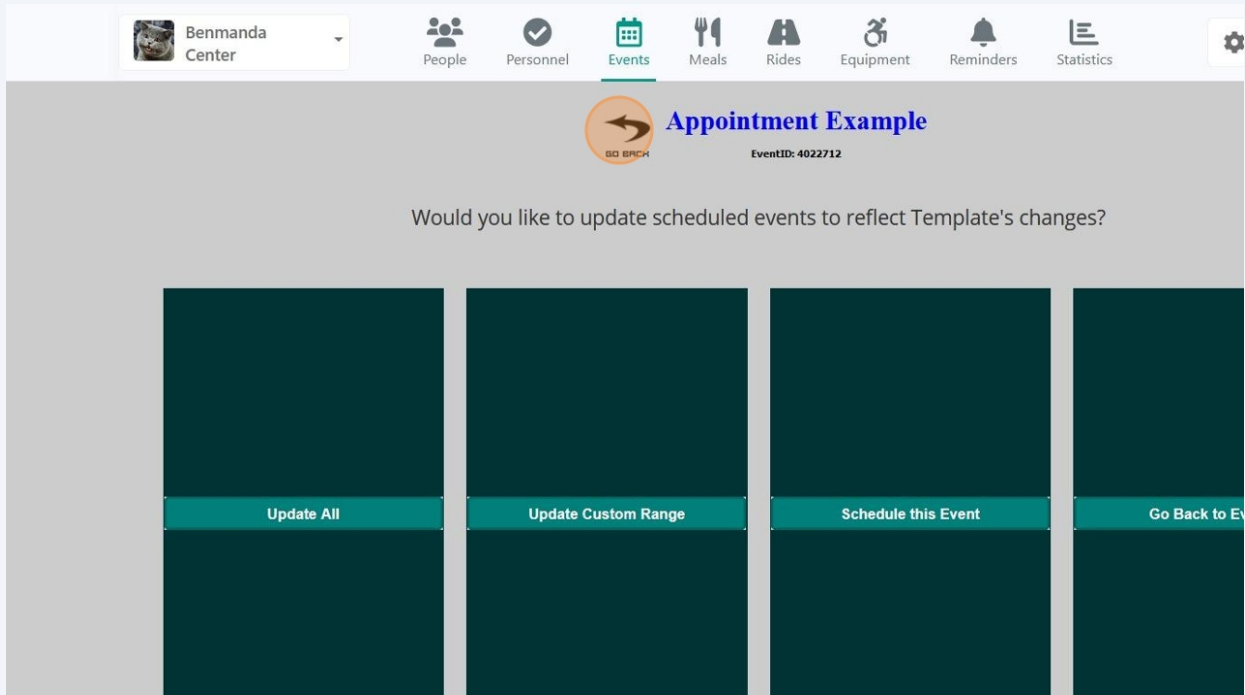
12

Click the 'Update' button at the bottom to finalize updating the template.



13

We can ignore the following screen since we don't need to make any other adjustments. Click the 'Go Back' option or otherwise exit this page.



The activity is now fully setup with Appointments! You may schedule it if needed.

## Registering for Appointments



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When signing someone up to an appointment activity, the process is largely the same as any other. Search and select them in your person list and choose the 'Register' button.

Benmanda Center

People Personnel Events Meals Rides Equipment Reminders Statistics AI Stotz

Advanced - Show All - Scan Card

Benmanda, Benmanda Washington, DC 123

**Chonks, Bethany (Chonki)** 34 **IN USE**

Chonks, Susan (884)-567-3422 Batavia, Kentucky 71

Deranek, Benjamin 5558675309 Batavia, IL 123

One, Resident (153)-153-1153 San Antonio, Kentucky 54

Perrotta, Zach 544 959 6211 San Antonio, TX 124

1 of 4

Show Master List Show Address Records 1 to 6 of 19

**Bethany Chonks (Chonki)** Age: 34 E-Mail MEMBER

Cinnyville, IL 12345 c: 1111111111 SAMS ID:

CLICK TO ACTIVATE PERSONNEL CLICK TO ACTIVATE MAILING LANGUAGE CLICK TO TRAVEL CUSTOM FILE INFO

REGISTER VIEW EVENTS TRANSPORT... TRIPS

PAYMENTS VOLUNTEER EQUIPMENT MEALS

ADD PHOTO ASSIGN CARD REMINDERS NOTES

GROUPS STATISTICS LOGS FILES

CONTRACTS

\$0.00 Total owed \$0.00 Your wallet + Add

Unpaid Paid

There are no unpaid payments. 😊

15

Any appointment activities will have a blue "Appointments" notation. Search and select the activity you wish to add this individual to.

People Personnel Events Meals Rides Equipment Reminders Statistics AI Stotz

Benmanda Center

Benmanda 123

**Chonks, Bethany (Chonki)** 34 **Appointments**

Chonks, Susan (884)-567-3422 Batavia, Kentucky 71

Deranek, Benjamin 5558675309 Batavia, IL 123

One, Resident (153)-153-1153 San Antonio, Kentucky 54

Perrotta, Zach 544 959 6211 San Antonio, TX 124

1 of 4

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PAYMENTS VOLUNTEER EQUIPMENT MEALS

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GROUPS STATISTICS LOGS FILES

CONTRACTS

View Events

Search...

**Appointment Example** Benmanda Center Appointments

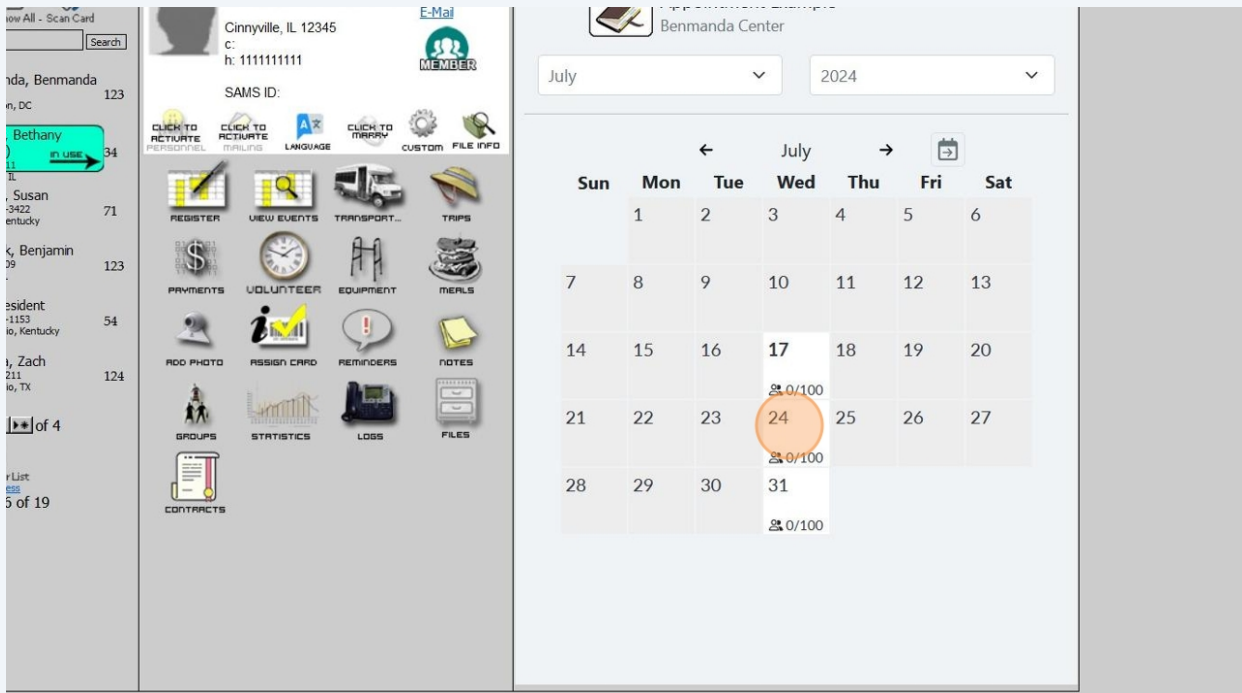
**Billiards** Benmanda Center

**Birthday Hour** Benmanda Center

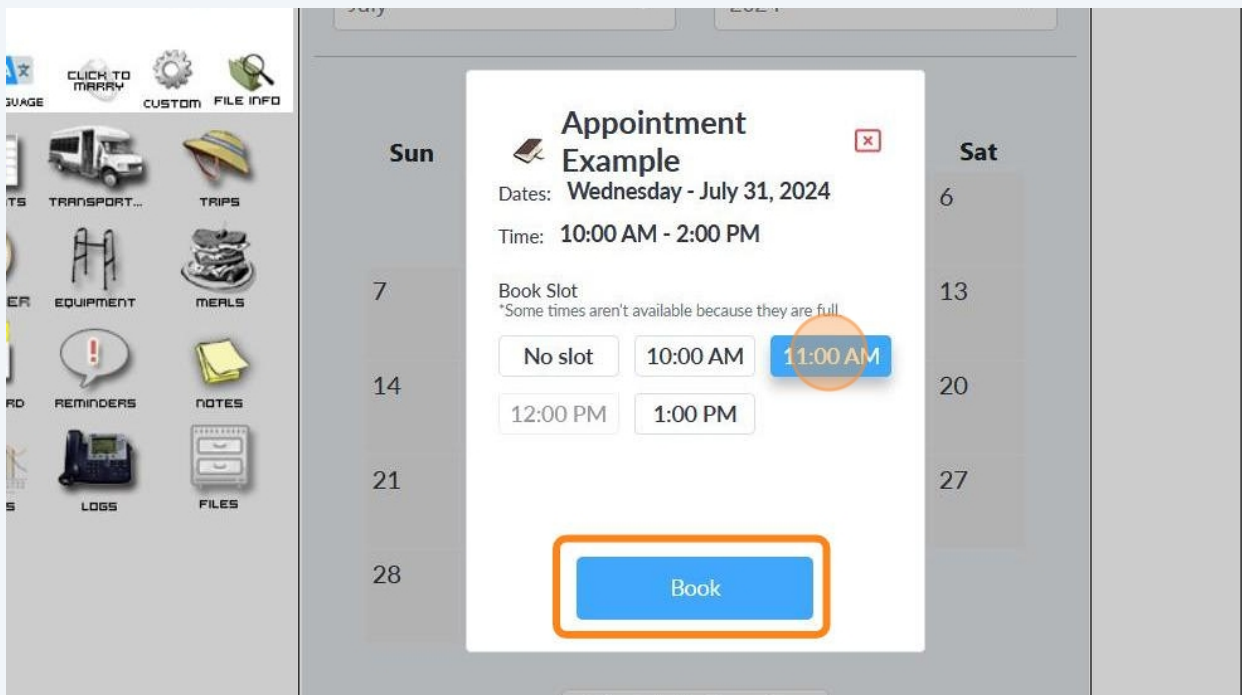
**Bongos with Friends** Benmanda Center

**Card Games**

16 Choose the date you wish to add them to.



17 This will open the Appointment slot time-picker. Select your time and then choose 'Book'. Alternatively, you can choose the 'No Slot' option if more work needs to be done before knowing the correct slot, or if for some reason you don't want to add them in a specific time-slot. Slots which are already full will be greyed-out and unselectable. For my example, I'll choose the 11AM slot, and then choose Book.





This individual has now been booked!

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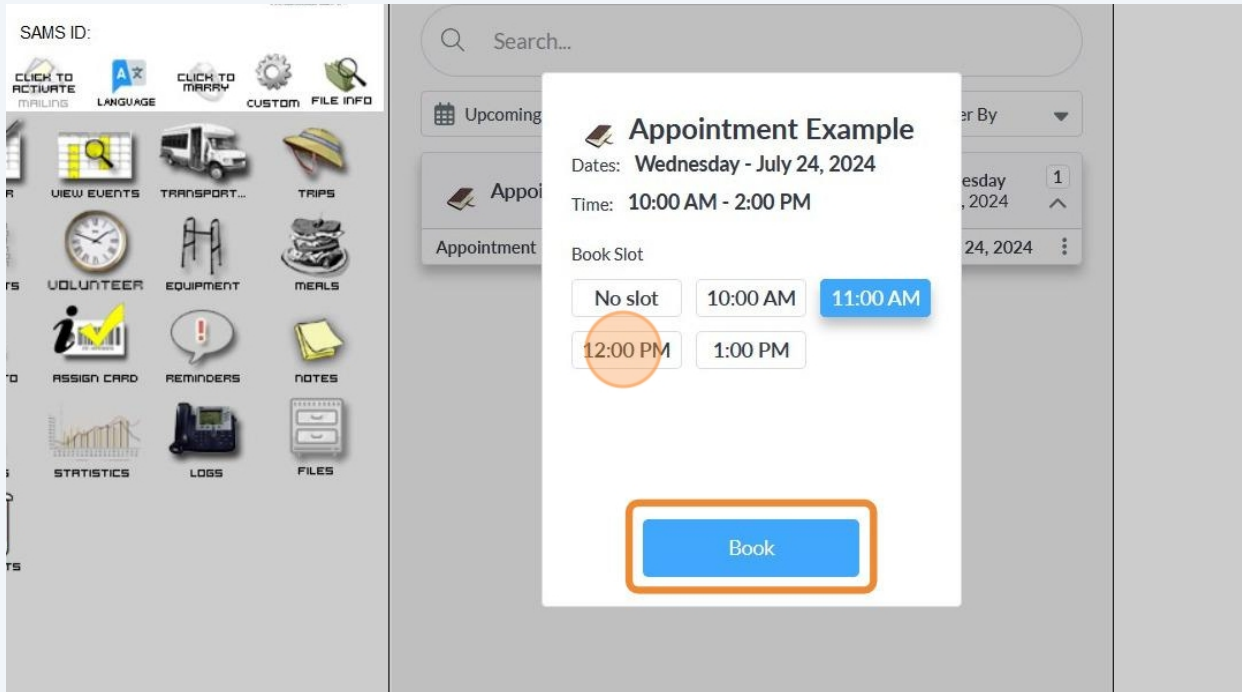
If we need to view someone's slot, click their 'View Events' area and find the activity. The time that's displaying will be their slot's start time. You may select it to adjust it.

The screenshot displays a software interface with a navigation bar at the top containing 'People', 'Personnel', 'Events', 'Meals', 'Rides', 'Equipment', 'Reminders', and 'Statistics'. The 'People' tab is active. On the left, a list of people is shown, with 'Bethany Chonki' highlighted in green. The main area shows the profile for 'Bethany Chonks (Chonki)', Age: 34, with contact information and a 'MEMBER' status. A grid of icons for various actions is visible, with 'VIEW EVENTS' highlighted by an orange box. On the right, the 'Bethany's Events' section shows a search bar, a filter set to 'Upcoming', and a table of events. One event, 'Appointment Example', is highlighted with an orange circle, showing a start time of '11:00 AM' on 'Wednesday Jul 24, 2024'.

Event Name	Start Time	Date	Count
Appointment Example	11:00 AM	Wednesday Jul 24, 2024	1
Appointment Example	11:00 AM	Jul 24, 2024	

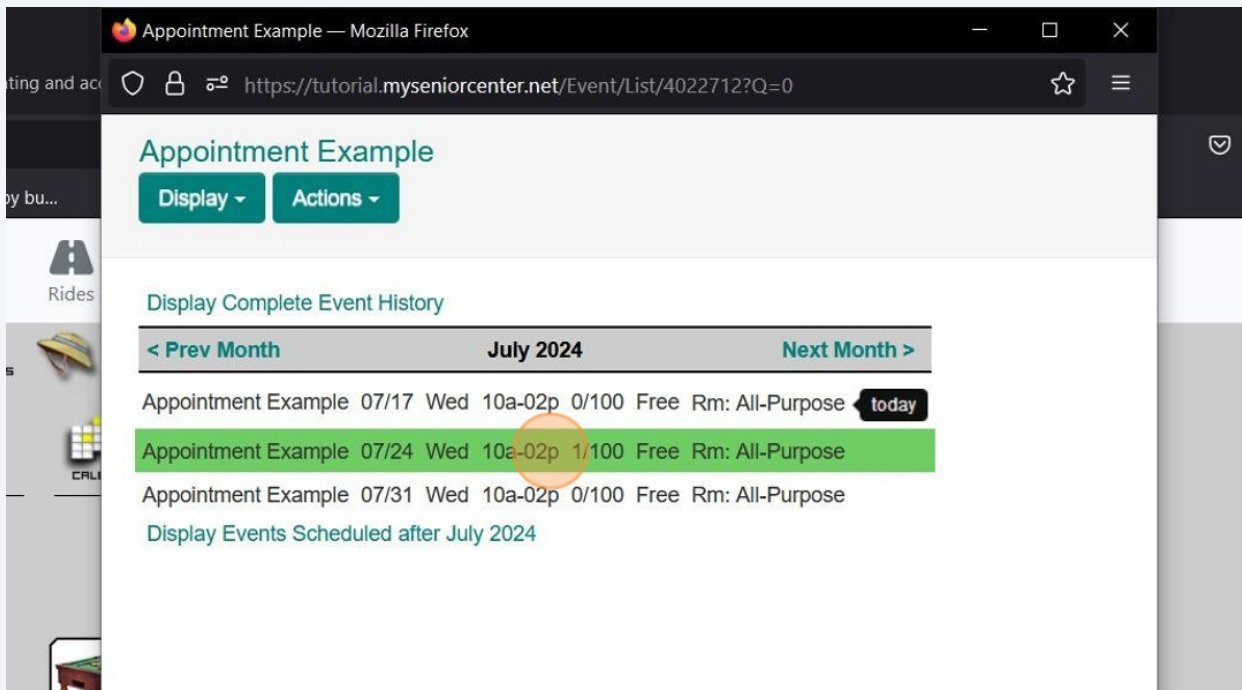
19

Selecting their time slot will open the timeslot picker again where you can choose a new slot, and then select 'Book' to adjust their appointment.



20

You may also view people's appointment times within the roster of the activity. Simply open up the schedule of the activity and then click the date you wish to view.



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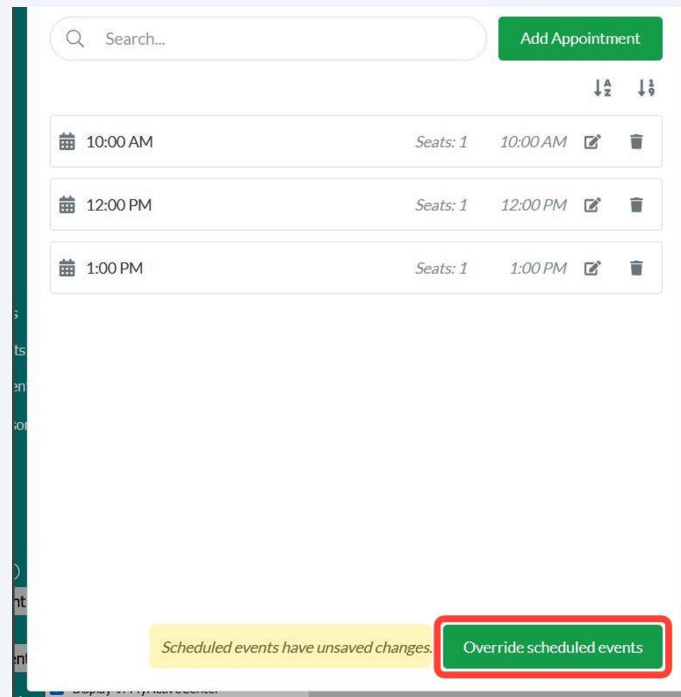
Here we can see everyone who's signed up to the activity and which time-slot they have.

The screenshot shows a web interface for managing appointments. At the top, there are several navigation icons: a back arrow labeled 'GO BACK', a printer icon labeled 'PRINT LIST', a trash can icon labeled 'EDIT DELETE', a megaphone icon labeled 'Broadcast', a gear icon labeled 'SETTINGS', a document with a pen icon labeled 'SIGNATURES', a clipboard icon labeled 'LIST', and an envelope icon labeled 'EMAIL LIST'. Below these icons, the date and time are displayed: 'Wednesday, July 24, 2024' and '10:00 AM - 02:00 PM'. There are 'PREVIOUS' and 'NEXT' navigation arrows on either side. A 'GUESTS' section shows '0' guests with a person icon. A 'START' button is next to a 'MULTIPLE REGISTER' button with the text 'CLICK HERE TO'. Below this, there is a list of appointments. The first entry is '#1' with a checkbox, a person icon, the name 'Bethany Chonks', and 'Appointment Slot: 12:00PM'. The second entry is '#2' with a checkbox, a person icon, the name 'Sugar Water', and 'Appointment Slot: 1:00PM'. To the right of each entry is a large 'X' mark. At the bottom, there is a clock icon and the text 'WAITING LIST'.

## Editing Appointments

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The first thing to know about editing appointments is that if you ever select the 'Override scheduled events' button, it will update all events currently scheduled under this template (past, present, and future). This means that if you don't wish to update all the dates because your changes are more nuanced, then you **do not** want to click this option.



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The second thing to know is that editing appointments can be a bit finicky. You have to be careful if you already have people signed up to previous appointments under this activity, mis-clicking 'Override scheduled events' can cause changes you didn't intend, etc. **I'd recommended contacting [Support@myseniorcenter.com](mailto:Support@myseniorcenter.com) if you need to make adjustments to an appointment activity that has been ongoing.**

## Extra Bits and Bobs

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**Manual Slots:** You can create manual slots instead of using the Auto-Fill method (or in conjunction with it). This allows you to set the number of seats, the start time of the appointment, and give it a name.

### Appointment configuration

Number of seat(s)\*

1



Appointment time\*

🕒 10:00 AM



Name your appointment (Optional)

Cancel

Submit

25

**Same-time appointments:** You may have multiple appointment slots that occur on the same time. This may be useful if there are different staff who are accepting appointments simultaneously, or perhaps these appointments are to reserve one lane of a pool, one of the multiple courts for a sport, etc.

The screenshot shows a user interface for managing appointments. At the top left is a search bar with a magnifying glass icon and the text "Search...". To its right is a green button labeled "Add Appointment". Below these are two sort icons: a vertical double-headed arrow and a horizontal double-headed arrow. The main area contains a list of four appointment rows. The first two rows are highlighted in orange and represent appointments at 10:00 AM. The last two rows are highlighted in yellow and represent appointments at 11:00 AM. Each row includes a calendar icon, the staff name, the number of seats, the time, and edit/delete icons.

Staff	Seats	Time	Actions
Becky	1	10:00 AM	Edit, Delete
Gevin	1	10:00 AM	Edit, Delete
Becky	1	11:00 AM	Edit, Delete
Gevin	1	11:00 AM	Edit, Delete



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**Having more slots available than total capacity:** You may have more appointment slots on offer than you do the day's total capacity. This can be useful when using the appointments seat quantity as more of a "capacity over time" limitation.

For example, perhaps you have a doctor with 5 shots of Super-Juice. They can handle administering it to people every 20 minutes. They're available all day, so which 20 minute-slot people sign up for doesn't matter to them so long as it's not more than 5 registrants total for the day.

You can set the max capacity to 5 and create time-slots for 1 seat every 20 minutes. Once 5 seats/slots have been registered to, the max capacity will have been reached, and any potential subsequent registrations will instead be added to the waitlist!

The screenshot displays two panels. The left panel is a form for creating an event, and the right panel is a list of appointment slots for an event titled "Appointment Example (Template)".

**Event Details Form:**

- Event Name: Super-Juice Injections
- Room: Select Rooms (All-Purpose X)
- Virtual Room: Select Virtual Room
- Virtual Instructor: Select Instructor
- Category: Test Events
- Icon: 0
- Description: None
- Instructor: (empty field)
- Time Begin: 10:00 AM
- Time End: 02:00 PM
- Max Signups: 5
- Appointments: Appointments
- Cost Per Event: 0

**Appointment Slots List:**

Time	Seats	Start Time	Actions
10:00 AM	1	10:00 AM	Edit, Delete
10:20 AM	1	10:20 AM	Edit, Delete
10:40 AM	1	10:40 AM	Edit, Delete
11:00 AM	1	11:00 AM	Edit, Delete
11:20 AM	1	11:20 AM	Edit, Delete
11:40 AM	1	11:40 AM	Edit, Delete
12:00 PM	1	12:00 PM	Edit, Delete
12:20 PM	1	12:20 PM	Edit, Delete
12:40 PM	1	12:40 PM	Edit, Delete

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**Waitlist:** Once the Max Signups has been reached, anyone else attempting to be signed up will be added to the waitlist. If you wish to move the waitlisted person into an available time-slot and exceed the max capacity, you may do so by clicking their 'View Events', finding the appointment in question and selecting the red numerical bubble, then choosing 'Book Time'. Please note this is only an option if the max capacity has been reached but there are still additional slots with availability.

The screenshot shows a user profile for 'Sugar Water' on the left and an 'Events' management interface on the right. The profile includes contact information and a grid of icons for various system functions. The 'Events' interface shows a search bar, filters, and a list of events. One event, 'Appointment Example', is highlighted with a red bubble containing the number '2'. A dropdown menu for this event is open, showing options for 'Appointments' and 'Waitlist', with a 'Book Time' button highlighted in orange.



That's all, folks!