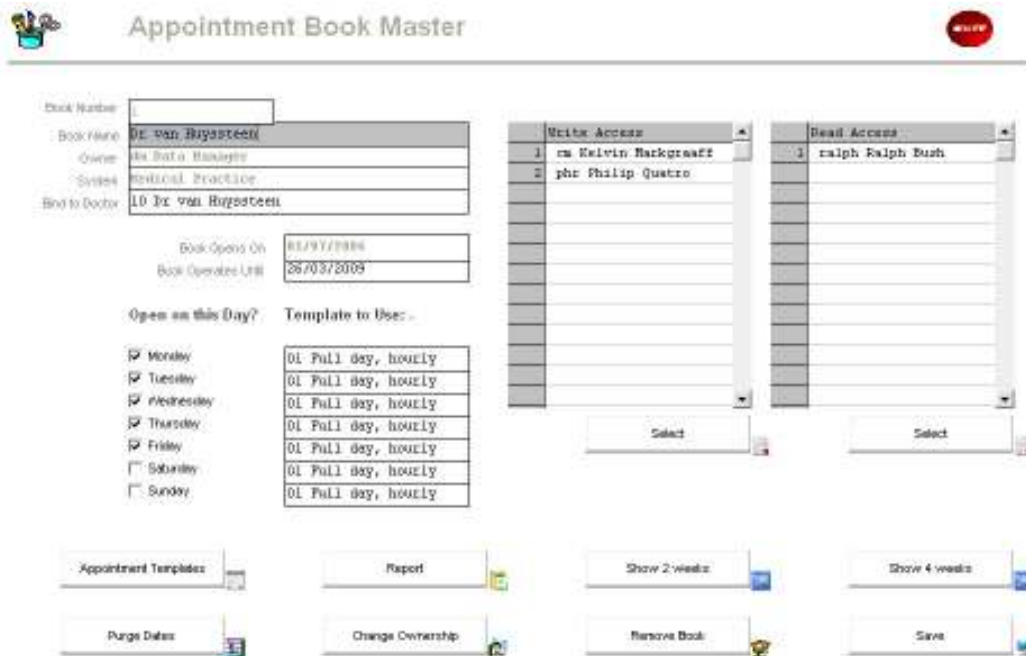# IES Appointments: Maintaining an Appointment Book

Purpose

The purpose of this Document is to explain how to maintain an Appointment Book.

Introduction

Once a Book exists, it is always listed with a 'show' and 'maintain' option when the Appointment Books function is accessed. Just choose the appropriate 'maintain' option.

On the Book Maintenance screen, you can extend the operating Date for the Book, you can amend the 'open' days, the Templates that apply for each day, you can change the WRITE and READ access, and you can use the following additional functions: -

Have you used your IES today?

Appointment Templates

This option opens the Appointment Templates, if your menu includes this option.

Report

This function advises you how to get a Report, which is done from the 'book view' screens.

Show 2 Weeks

This option opens a 2 week view of the Book.

Show 4 Weeks

This options opens a 4 week view of the Book.

Purge Dates

This option allows you to purge old appointments, if you no longer wish to keep them on-line. While old appointments are still on-line, they can be drilled from the CRM events for viewing.

Change Ownership

The owner of a Book may transfer ownership to another User. If the Owner is no longer a registered User of the system, then a User with WRITE access may assume ownership.

Remove Book

The current registered owner of the Book is the only person allowed to completely remove the Appointment Book from the system, inclusive of all history and current appointments on it.

© Infolab, 2006

 Have you used your IES today?