Appointment Calendar User Guide

For PhonePad 5



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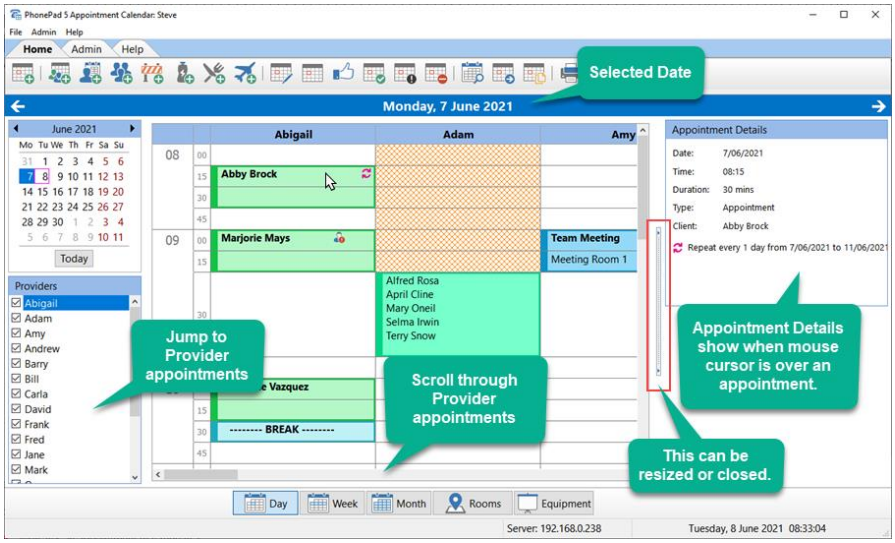
Get started

Appointment Calendar is a shared scheduler for PhonePad 5. Use it to book client appointments, coordinate staff meetings, reserve rooms and equipment, and record when staff are unavailable. It connects through the PhonePad 5 Server and uses the same contacts as the PhonePad Address Book.

Open Appointment Calendar

1. In PhonePad, go to the **Home** toolbar and click **Appointment Calendar**. You can also choose **Appointment Calendar** from the **Tools** menu.
2. If the Trial screen appears, click **Continue Trial**.
3. Check that the staff calendars you need appear in the **Providers** list. A provider is a staff member whose appointments you can manage. Your organization may use another label, such as Doctor or Attorney.

If the app stops at an access message, or a calendar you need is missing, ask your PhonePad manager or administrator to grant access. See **Set up calendar access**.



The Day view shows the selected date, provider calendars and appointment details.

Book a first appointment

Choose the date, click an empty slot in the correct provider's column, then click **Add Appointment**. Select the client and duration, check the booking details, and click **OK**. See **Book and manage client details** for addresses, rooms and new clients.

Navigate the schedule

Choose a date and provider

The calendar opens in **Day** view with today selected. Click a date in the small calendar to move there. Use the month arrows or click the month or year to jump farther. Click **Today** to return to the current date. In Day view, use the arrows beside the displayed date to move one day at a time.

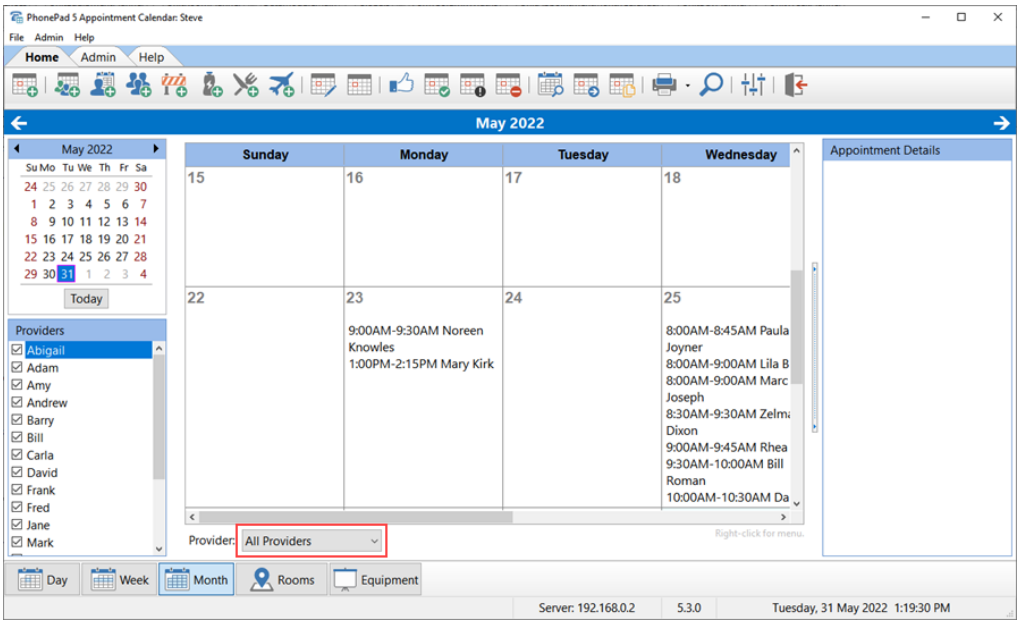
The **Providers** list shows the calendars you have permission to use. Clear a checkbox to hide a provider. In Day view, click a provider's name to jump to their column if it is off-screen. In Week view, click the name to load that provider's schedule.

Pick the right view

View	Use it to
Day	See the selected day across visible providers and book directly in a provider's column.
Week	Review a single provider's week. Click a day in the small calendar to move to that day in the grid.
Month	See the month for **All Providers** or a single provider. Click a day to jump to Day or Week view according to that selection. Right-click the month grid and choose **Set Column Widths** to adjust the columns.
Rooms	Check when rooms are booked.
Equipment	Check when equipment is booked.

Read appointment details

Hover over a booking to see its details below the grid, including participants for a meeting. The icons on appointments indicate repeating, confirmed, completed and no-show bookings. The status bar shows hints, the server IP address and the current date and time. Date formatting follows your computer's regional settings.



Month view with All Providers selected.

Identify appointment status icons

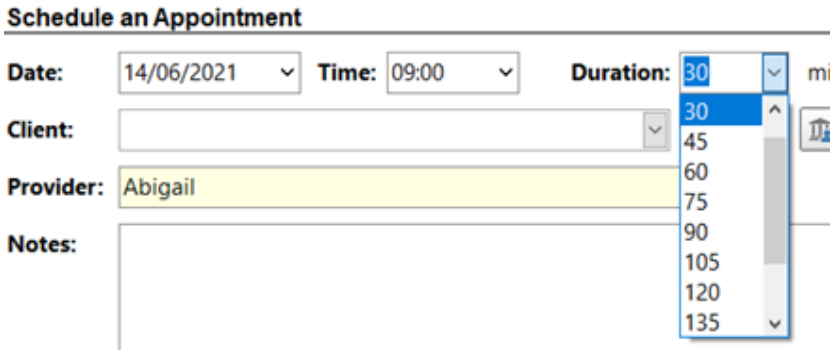
- Repeating appointment
- No-show
- Confirmed appointment
- Completed appointment

Book and manage client details

Book a standard appointment

1. Select the date and click an empty slot in the provider's column. Click **Add Appointment** or choose **File > New > Appointment**.
2. Check the date, provider and start time. Set the duration, or enter the end time if your administrator has enabled start and end time entry. For a full-day booking, turn on **All Day**. This disables the time and duration controls.
3. Select the client from the list or start typing their name. Use **Search** to look them up by another field or **New** to add someone to the PhonePad Address Book.
4. Assign a room if needed. Enter any notes and, if shown, a subject. Use the clear control next to the room assignment to remove that room.

5. For an off-site appointment, enter the address, email and phone manually or use **Addresses** to select **Business Address** or **Home Address**. Appointment Calendar fills in the corresponding contact details available in the Address Book.
6. Click **OK** to save. For a series, set **Repeat** before saving and review the proposed dates.



Choose a duration when the appointment form uses time and duration entry.

Find or add a client

Click **Search**, choose **Fullname**, **Firstname**, **Company**, **Address**, **City** or **Phone**, and enter text in **Search for**. Press **Enter** or click **Search**. Address, city and phone search both home and business details. Select the result and click **OK**.

If the client is missing, click **New** from the appointment. Fill in **Firstname** and **Lastname**, add other details if available, and click **OK**. The contact is saved in the PhonePad Address Book.

Review contact details and history

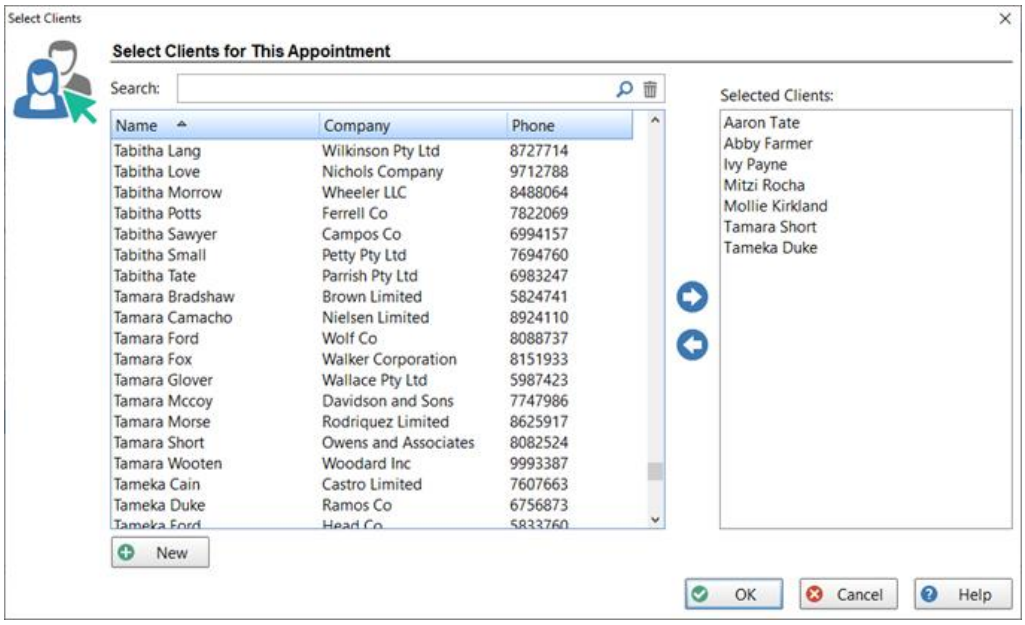
Use the appointment's Address Book edit control to update the client's stored details. Scroll right to find the control that displays the selected client's details. Click **History** to see that client's appointments. Select a history entry and click **View**, or double-click it, to open the details.

Book several clients or use free text

Book clients into one time slot

Use **Concurrent Appointment** when a single provider needs to see multiple clients in the same booking.

1. Click an empty slot in the provider's column and choose **Add Concurrent Appointment** or **File > New > Concurrent Appointment**.
2. Set the duration or turn on **All Day**. Click **Add** to open **Select Clients for This Appointment**.
3. Select each client on the left and click the right arrow, or double-click their name. To remove a selection, select it on the right and click the left arrow, or double-click it. Use **Search** to filter by all or part of a name. Click **Cancel** beside the search controls to clear the search, or **New** to add a missing client.
4. Click **OK** to return to the appointment. You can also remove a client from the appointment form with **Remove**. Add notes if needed and select **Display Notes instead of Clients** if the calendar should show the notes. Click **OK** to book the slot.



Move names to the right-hand list to include them in the concurrent appointment.

Book a slot with your own description

Use **Miscellaneous Appointment** for a booking described in free text, such as a briefing with several visitors whose names are entered as text.

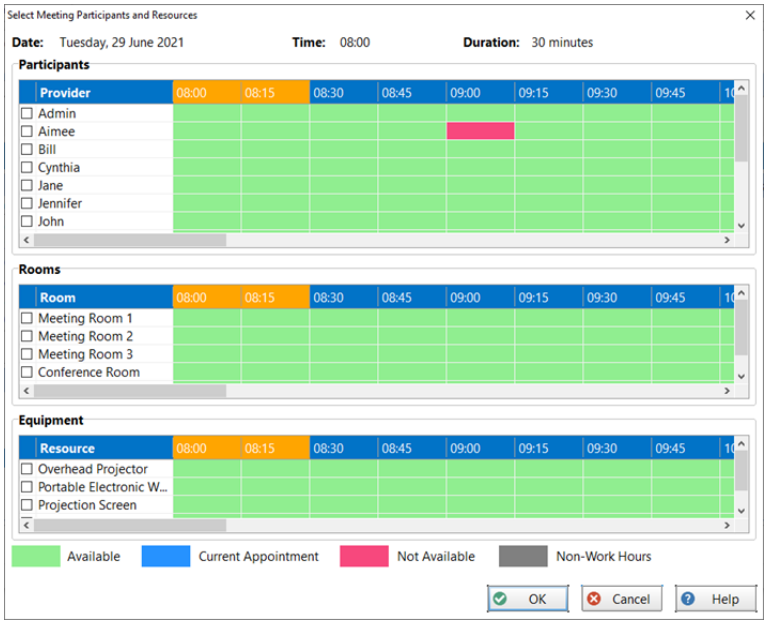
1. Select an empty slot and choose **Add Miscellaneous Appointment** from **Home**, or use the miscellaneous entry under **File > New**.
2. Check who it is assigned to and enter the duration or choose **All Day**. Assign or clear a room as needed.

3. Enter the description in **Text** and add any additional **Notes**. Use **Repeat** if required, then click **OK**.

Schedule staff meetings

Meetings are for staff participants. Use the meeting form to check availability and reserve a room or equipment at the same time.

1. Select an empty slot in a provider's column and choose **Add Meeting** or **File > New > Meeting**.
2. Enter a **Subject** and set the meeting date, time and duration. If the meeting lasts all day, set **All Day**. Select **External Location** for an off-site meeting where a meeting room is unnecessary.
3. Click **Select Participants and Resources**. The time you originally selected is orange. Pink indicates unavailable time. Scroll across to find a time when the people and resources you need are available.
4. Check the boxes for the participants, room and equipment you want, then click **OK**.
5. Review the selections in the meeting form and click **OK** to save.



Check staff, room and equipment availability in the same window.

Change the meeting selections

After you select resources, the meeting's date, time and duration fields are disabled. Reopen **Select Participants and Resources** to revise the selection. Use **Clear** on the meeting form to remove the selected participants and resources. Use **Rooms** and **Equipment** views to check bookings independently of the meeting form.

Reserve time when staff are unavailable

Select the provider's slot and choose the relevant type from **Home** or **File > New**. Check the dates and times, then click **OK** to save.

Type	What to enter
Personal	Enter a subject for the provider's personal appointment. Set the date, time and duration or choose **All Day**.
Block Time	Reserve time so appointments cannot be booked there. Set the date, start time and duration, or choose **All Day**. Use **Repeat** for regular late starts, early finishes or rostered days off.
Break	Set a date, time and duration for a short break. Add **Repeat** for a regular break.
Lunch	Set the date, time and duration, then choose **Breakfast**, **Lunch** or **Dinner** in **Type**. Use **Repeat** if the meal break recurs.
Leave	Set a **Start Date** and **End Date** or enter the number of days. Changing the end date recalculates the number of days. Changing the number of days adjusts the end date.

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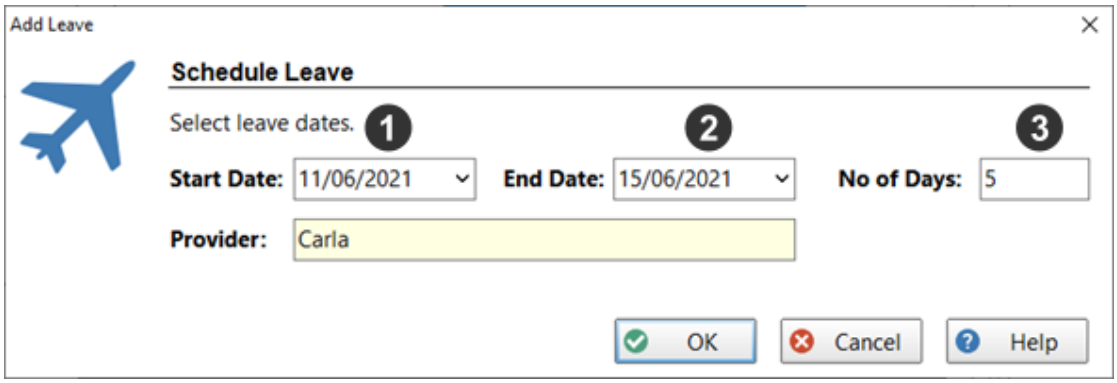


Set a date range or enter a number of days for provider leave.

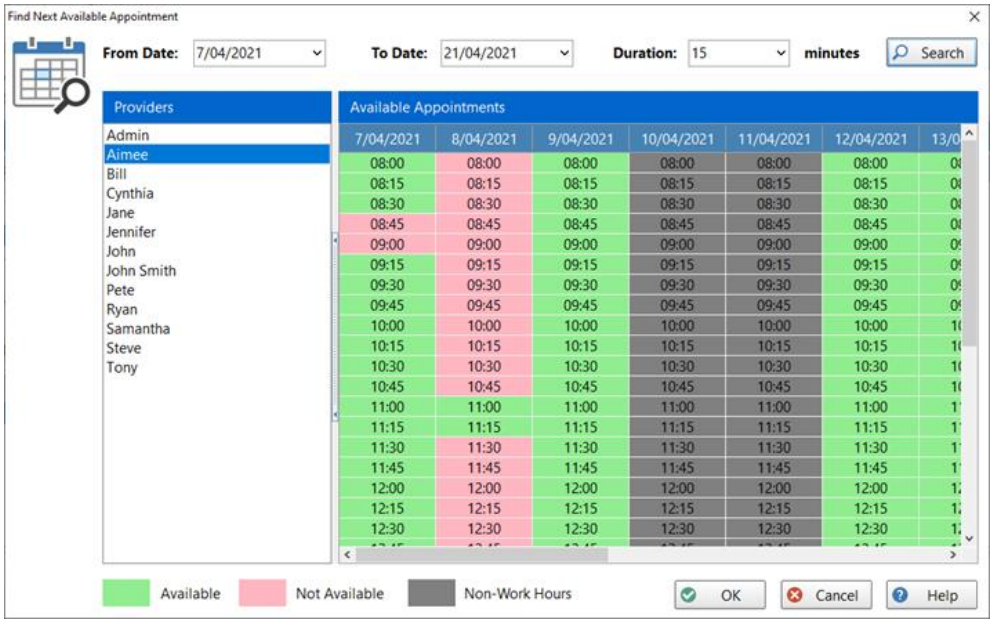
Block a regular late start

If a provider starts late every Wednesday, select the first Wednesday and block the period from the usual opening time until the provider starts. Click **Repeat**, choose a weekly pattern, and review the dates before saving. For provider-specific hours, keep the organization's broader scheduling window available for other staff.

Find a time or move a booking

Find the next available appointment

1. Select a provider and click **Find Next Available Appointment** on **Home**, or choose **Find Next Appointment** from **File**.
2. Set **From Date**, **To Date** and the required **Duration**. Select the provider to check and click **Search** after changing the dates or provider.
3. Pick an available green slot. Pink periods are unavailable. Check that the opening is long enough for the full booking.
4. Click **OK** to open the **New Appointment** screen with the selected slot filled in. Complete the client and booking details, then save.



Use the availability grid to find an opening for the selected provider.

Move an existing appointment

Select the booking and click **Reschedule Appointment**. In the rescheduling window, click **Select** and choose a new time in **Find Next Available Appointment**. Click **OK** to return and compare the proposed slot with the original shown on the left. Click **Reschedule** to commit the move.

Copy an appointment to a new slot

Select a standard or concurrent appointment and click **Copy Appointment**. Set the new date, time, duration or provider. For a concurrent appointment, clear the checkbox for any client you want to leave out of the new booking. Click **OK** to create the copy. The original remains on the calendar.

Manage appointments after booking

View or edit a booking

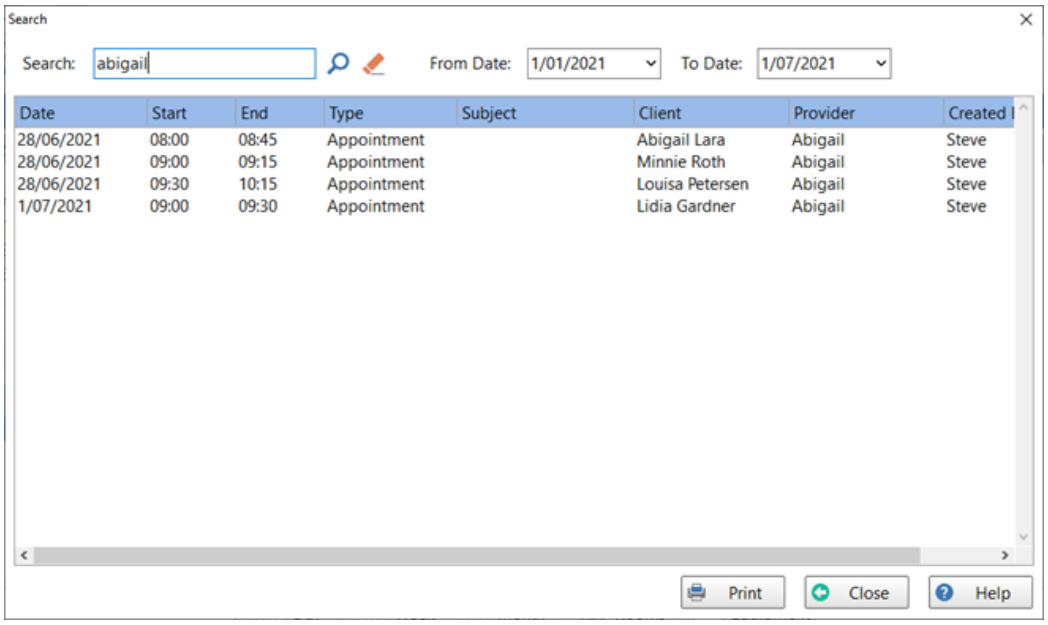
Select the booking and click **View Appointment** for a read-only view. To make changes, click **Edit Appointment** or double-click the booking. Check the updated details and save the form. To move a booking after checking availability, use **Reschedule Appointment**.

Record the outcome

Action	What to do
Confirm	Select the booking, choose **Confirm Appointment** from **File** or click the confirmation button on **Home**, and confirm the action. The booking gains a confirmation icon and the client's history records the change.
Complete	Select the booking and choose **Complete Appointment**. The completed icon identifies the booking on the calendar.
No show	Select the booking, click **No Show**, and confirm. The calendar shows the no-show icon and the outcome appears in the client's history.
Cancel	Select the booking and choose **Cancel Appointment**, then confirm. Enter a note if your administrator requires one. Cancellation frees the slot and creates an entry in **Appointment History**. For a repeating booking, see **Cancel a repeating appointment**.

Find a booking by name or subject

1. Click **Search** on **Home**, or choose **Search Appointments** from **File**.
2. Set a date range, enter text matching the subject, client or provider, and click **Search**.
3. Double-click a result to jump to the appointment on the calendar. Use **Clear Search** to start over, or **Print** to print the results.

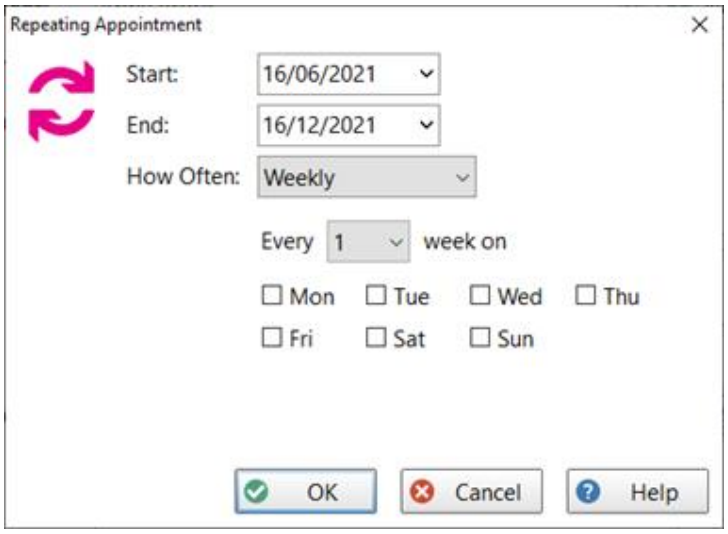


Search results give you a direct route back to the matching appointment.

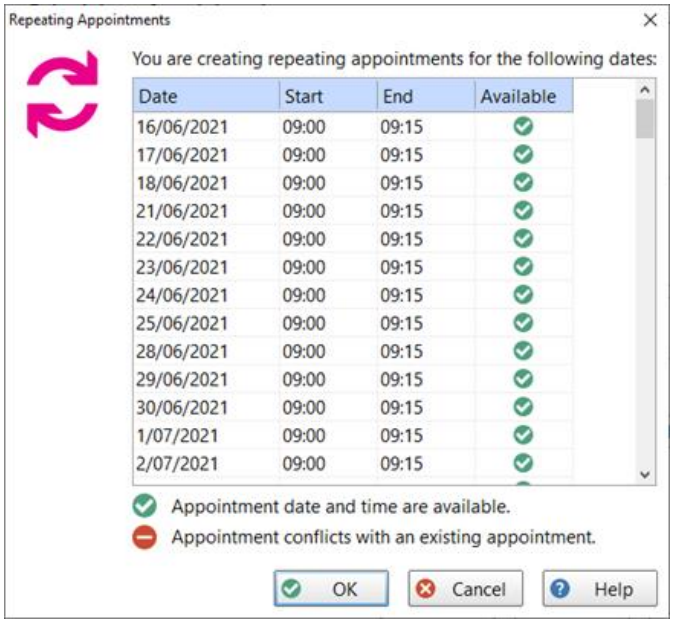
Schedule repeating appointments

Use recurrence for supported appointment types such as standard appointments, miscellaneous appointments, blocked time and breaks. The **Repeat** button opens the recurrence settings.

1. In the appointment form, set the provider, time and other booking details, then click **Repeat**.
2. Choose **Daily**, **Weekly** or **Monthly**. Enter the start and end dates and choose the options for that pattern.
3. Click **OK** to return to the appointment. Check the recurrence summary on the form and click **OK** again.
4. Review the list of appointments about to be created. If any proposed dates conflict with existing bookings, the series cannot be saved. Adjust the booking or recurrence and review the dates again.
5. Click **OK** on the review screen when the proposed dates are clear. The saved appointments display the repeating icon.



Set a weekly pattern and a date range for the series.

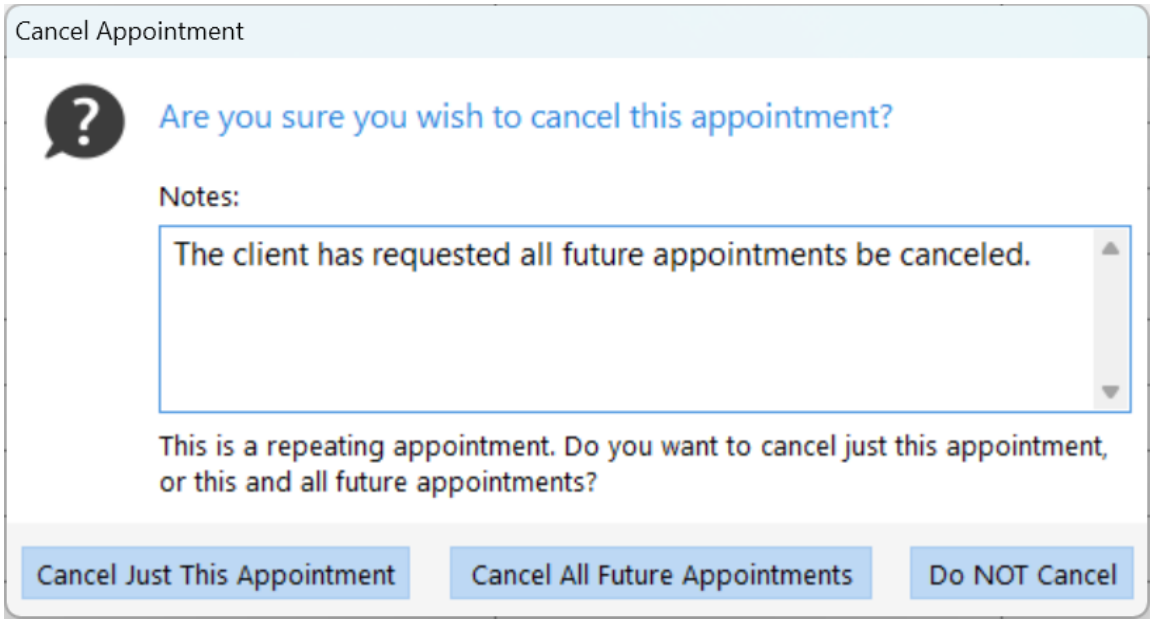


Review the proposed occurrences before creating the series.

Cancel a repeating appointment

1. Select the occurrence you want to cancel, or select the first occurrence you want removed if you plan to cancel the rest of the series.
2. Click **Cancel** on the **Home** toolbar or choose **File > Cancel Appointment**. Enter a note if your administrator requires one.
3. In the **Cancel Appointment** dialog, choose the option that matches what you want to cancel.

Option	What happens
Cancel Just This Appointment	Cancels the selected occurrence only. The other bookings in the series stay on the calendar.
Cancel All Future Appointments	Cancels the selected occurrence and every later occurrence in the series. Earlier bookings stay on the calendar.
Do NOT Cancel	Closes the dialog without cancelling any bookings.



Choose whether to cancel one occurrence or the selected occurrence and every later one.

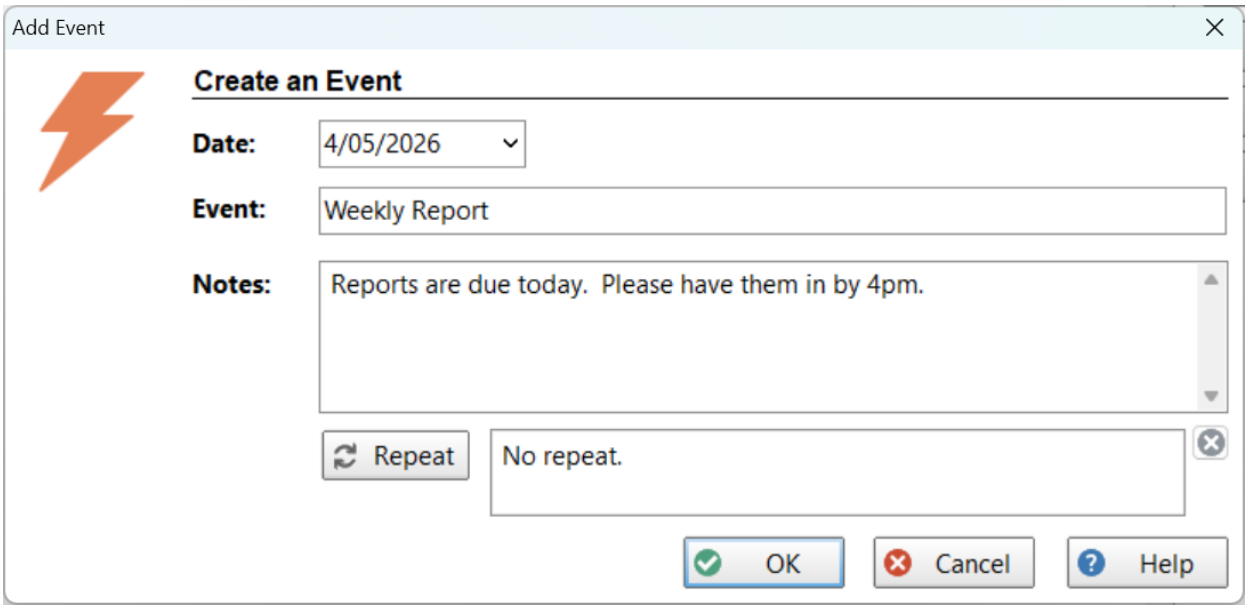
[CONFIRM CURRENT PROCEDURE: Verify whether editing a repeating appointment affects one occurrence or offers a series-wide edit. Add the exact steps and a screenshot if that option exists.]

Manage calendar events

Use **Events** to manage dated entries such as an office anniversary. Open **Events** from the **Home** toolbar or the **File** menu.

Add an event

1. Click **Add** in the Events window.
2. Select the **Date**, enter the **Event** name and add optional **Notes**.
3. Click **OK**.



An event needs a date and name. Use Notes for extra detail.

Repeat an event

Click **Repeat** while adding or editing an event. Choose **Daily**, **Weekly** or **Monthly**. For an annual event, choose **Monthly** and set the interval to every 12 months.

Find, edit or delete an event

Choose **All Events**, **Past Events**, **Current Events** or **Future Events** at the bottom of the Events window. **Current Events** shows today's entries. Select an event and click **Edit**, then save your changes with **OK**. To remove an event, select it, click **Delete**, and confirm.

Print schedules and set reminders

Print a schedule

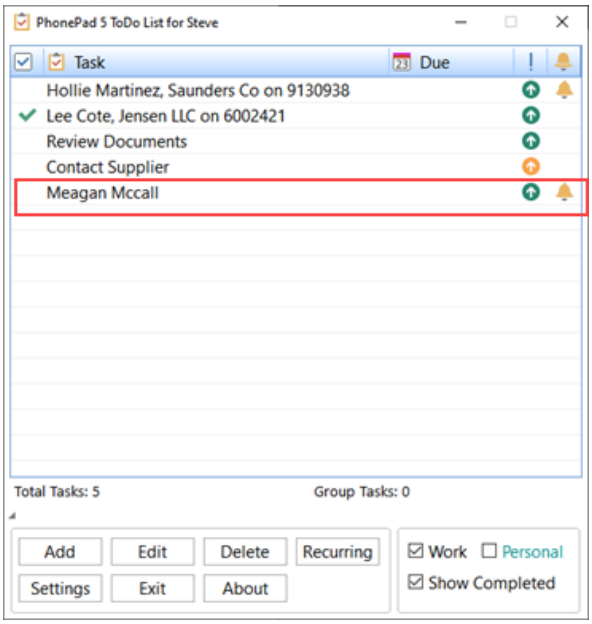
Click **Print** on the **Home** toolbar or choose **File > Print**. Select the date or week and, where needed, the provider before printing.

Report	What it includes
Print Day for Provider	The selected provider's appointments for the selected day. Use Day view.
Print Day for Provider with Addresses	The selected provider's day, including client addresses. Use Day view.
Print Week for Provider	The selected provider's appointments for the selected week. Use Week view.
Print Month for Provider(s)	A monthly schedule for one or more providers.

To print appointments matching a search, use **Print** in the Search window. Administrators can also print the appointment history. For month printouts, the **Only Show Start Time** preference omits end times to save space.

Add an appointment to the To Do List

1. Open the **To Do List** from **Home** or **File**.
2. Select the appointment in the calendar. Hold **Alt** and the left mouse button, and drag the appointment from the calendar into the To Do List.
3. Set a reminder on the resulting task. To create reminders automatically when you drag appointments in, enable **Automatically Create Reminders for Appointments** in the To Do List settings.

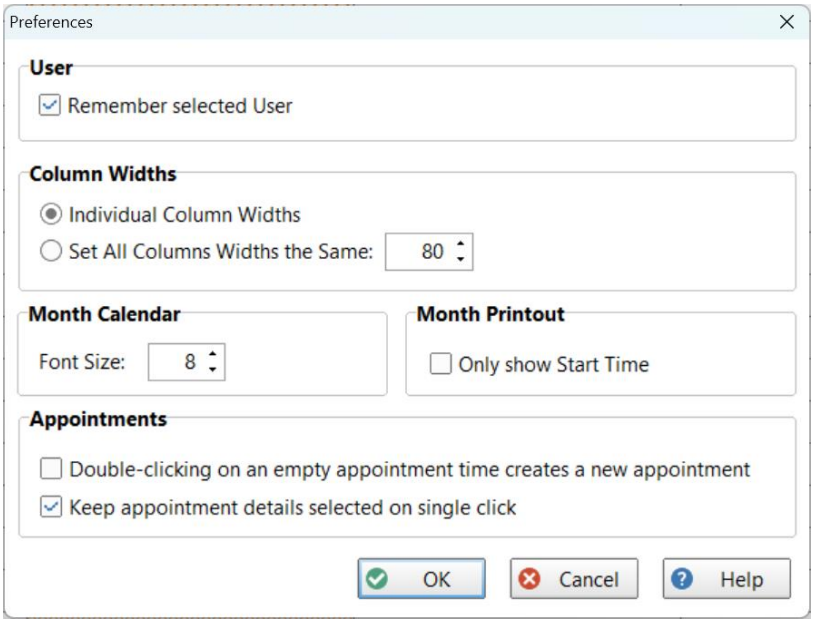


An appointment added to the To Do List.

Personalize your calendar

Open **File > Preferences**. These settings apply to your own view of Appointment Calendar.

Preference	Effect
Remember Selected User	Restores your provider selection when you reopen the app.
Individual Column Widths	Lets you set Day and Week column widths independently.
Set All Columns Widths the Same	Uses the specified width for all Day and Week columns.
Month Calendar Font Size	Changes the size of appointment text in Month view.
Only Show Start Time	Omits end times from the month printout.
Double-clicking on empty appointment time creates a new Standard Appointment	Lets you create a standard appointment by double-clicking an empty slot.
Keep appointment details selected on single click	Pins the details of the appointment you click. Click it again or click elsewhere in the grid to unpin. A small cursor icon appears in the status bar while details are pinned.



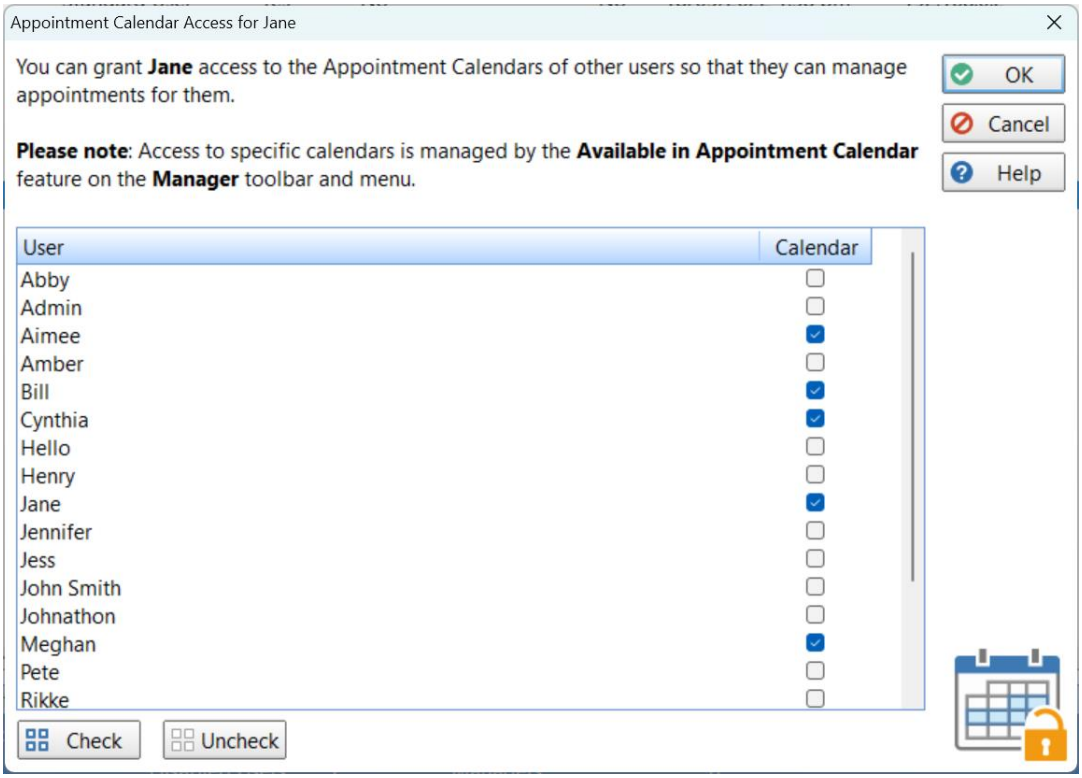
Preferences for provider selection, column widths and appointment behaviour.

Set up calendar access

Appointment Calendar is installed with PhonePad and its updates. Before staff use it, a PhonePad manager or administrator must grant access to the appropriate calendars. The **Admin** menu and toolbar in Appointment Calendar are available to PhonePad System Administrators.

Grant access in PhonePad

1. Open the **Manager** tab in PhonePad and click **Manage Users**.
2. Select the staff member who needs access and click **Calendar**.
3. Check the calendars that staff member should be able to use. Clear a checkbox to remove access. **Check** and **Uncheck** provide a quick way to select or clear all calendars.
4. Click **OK** and repeat for each staff member who needs access.



Choose which calendars the selected staff member can access.

Open the administrator settings

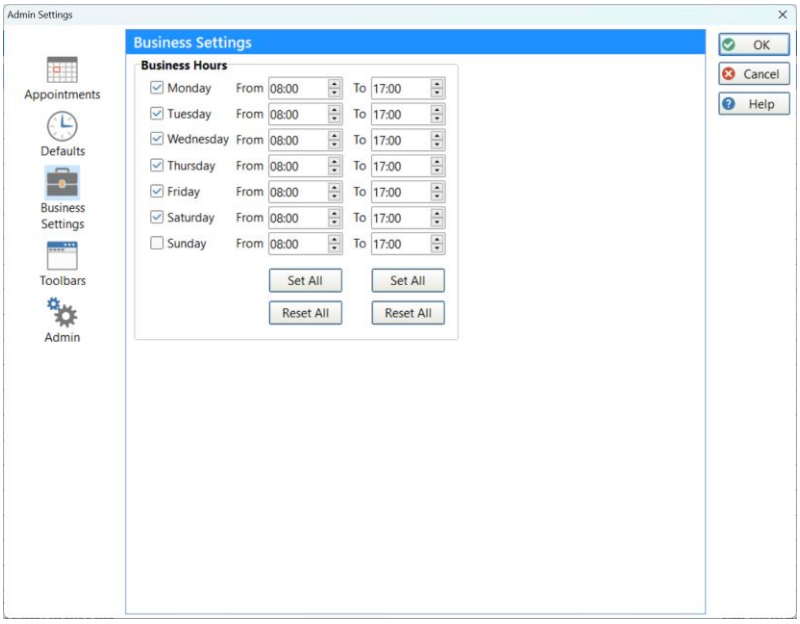
Launch **Appointment Calendar** from PhonePad. If prompted, click **Continue Trial**. If an access message prevents the app from opening, complete the calendar assignments in PhonePad. Once the calendar opens, choose **Admin > Admin Settings** or the **Admin Settings** button on the **Admin** toolbar.

Configure hours and scheduling rules

Set business hours

In **Admin Settings**, open the business-hours settings. Check the days you work and set the start and end time for each. **Set All** copies Monday's corresponding time across the week. **Reset All** restores the defaults.

Set **First Appointment** to the earliest first slot used on any day and **Last Appointment** to the latest last slot used on any day. Use recurring blocked time for individual providers who start later or finish earlier than the available scheduling window.



Business-hours settings for the working week.

Set intervals and durations

Setting	Effect
Calendar Interval	Sets the standard interval in the scheduling grid.
Defaults	Sets the starting duration for supported appointment types.
User Appointment Durations	Use the **Home** toolbar command to set individual default durations in the second column. The default is 15 minutes. Click **OK** to save.
Skip Weekends for Multi-Day Appointments	Excludes weekends when creating multi-day appointments.
First Day of Week	Choose Sunday or Monday for the date picker and the Week and Month views.
12 Hour Time or 24 Hour Time	Changes the time display throughout Appointment Calendar. The default is 24-hour time.

Example calendar intervals and appointment lengths

With a 15-minute **Calendar Interval**, the grid has four slots per hour. A 30-minute standard appointment spans two of those slots. If one provider usually needs 45 minutes, set that provider's **User Appointment Duration** and check that a new booking for them starts with the expected duration. The interval controls the grid, and the duration controls how much time an appointment occupies.

Configure appointment forms and displays

Open **Admin > Admin Settings** to change what staff see when they enter or review bookings.

Setting	Effect
Appointment Name	Show the client name or company name in the calendar block.
Client Label	Replace **Client** with the term your organization uses, such as Patient.
User Label	Replace **Provider** with a term such as Doctor or Attorney.
2nd Line and 3rd Line	Choose **Address**, **Subject**, **Phone Number** or a blank line when the booking spans enough slots.
Show Subject Field and Show Room Field	Control whether the appointment form displays those fields.
Concurrent Appointments	Choose whether the scheduler shows client names or notes.
Appointment Time Selection	Choose **Time and Duration** to calculate the end time from the start and length, or **Start Time and End Time** to enter both times.
Identification Label and Identification Hint	Change the label and prompt on the **New Client** form.
Require Notes on Cancel	Require staff to enter a reason when cancelling an appointment.

Setting	Effect
Appointment Colors	Set colors for the different appointment types. **Reset Colors** restores the defaults.
Toolbars	Clear the Home toolbar buttons staff do not need and click **OK**.

Offer reusable appointment notes

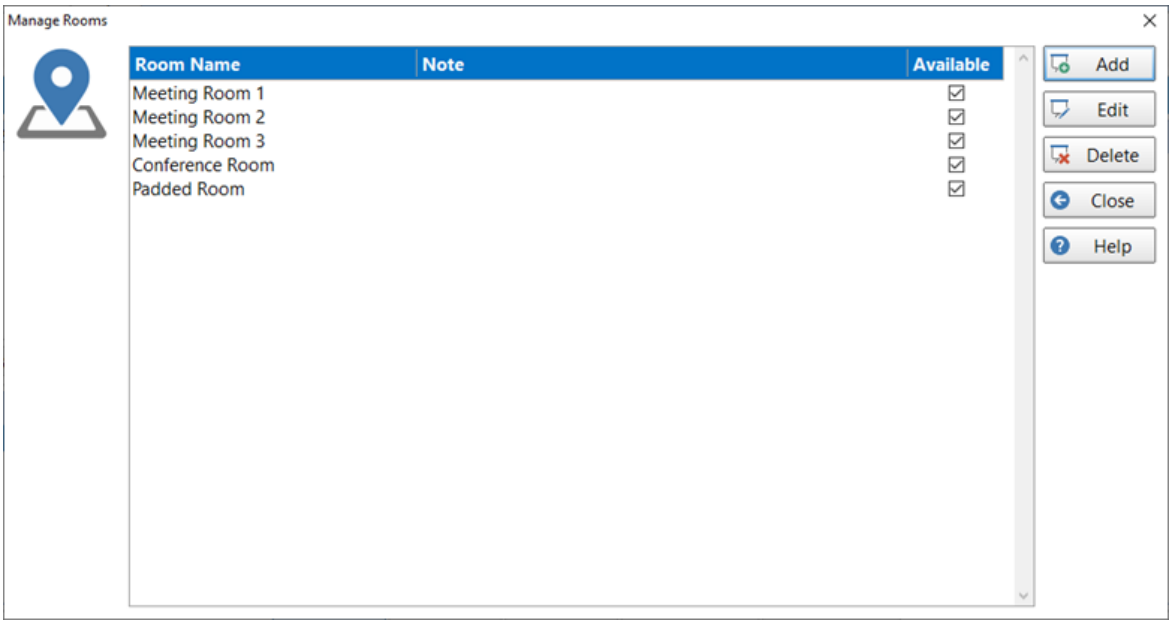
Open **Admin > Appointment Notes Templates** to manage wording staff reuse in appointment notes or the **Text** field of miscellaneous appointments. Enable **Show Templates Button** in **Admin Settings** so users can access templates from the appointment forms.

Manage resources and appointment history

Maintain the resource lists

Choose **Admin > Manage Rooms** or **Admin > Manage Equipment**. The corresponding buttons on the **Admin** toolbar open the same lists.

Task	Steps
Add	Click **Add**, enter a name and optional **Note**, set **Available**, and click **OK**.
Edit	Select the resource and click **Edit**. Save with **OK**, or use **Cancel** to discard the changes.
Make unavailable	Clear **Available** to keep the record while preventing staff from selecting it for meetings.
Delete	Select the resource, click **Delete**, and confirm.



The room list is where administrators maintain rooms available for booking.

Review appointment changes

Open **History** from **Admin** or use the history button on the **Admin** toolbar. The most recent changes are at the top. Select an entry and click **View**, or double-click it, to see the recorded details. Use the history window's print option when you need a printed record. For a single client's bookings, use **History** on the client appointment form.

Open the Log Viewer or reset trial data

Choose **Admin > Log Viewer** to open the log viewer. **Erase All Calendar Data** in Admin Settings is destructive and asks for confirmation twice. It can be used to clear test bookings after a trial. Use it only when you intend to remove all Appointment Calendar data.

Licensing and support

Use the trial or purchase a license

Appointment Calendar has a separate license from PhonePad. Appointment Calendar comes with a 30-day trial. Click **Continue Trial** while the trial is active. **Extend Trial** becomes available three days before expiry and provides a 30-day extension, up to twice. Click **Buy Now** on the Trial screen to open the order page. Click **Exit** to close the app.

Activate your license

1. Have the license details from your purchase email ready. You can also retrieve them from your account at **www.myphonepad.com**.
2. Click **License** on the Trial screen, or open the **Admin** toolbar and click **License**. You can also choose **Admin > License**.
3. Enter the licence details and click **Activate**.
4. Click **OK** after activation. Appointment Calendar closes to apply the license. Restart it from PhonePad.

Get help or send feedback

Need	Where to go
Instructions for a feature	Click **Help** on the **Help** toolbar, or choose **Help Contents** from the **Help** menu.
A problem with the calendar	Click **Support** from the **Help** toolbar or menu to send a support request.
A problem extending the trial	Email **support@cybercom-software.com**.
A suggestion for the product	Use **Suggestions** on the **Help** toolbar or menu.
Version number or license holder	Open **About** from the **Help** toolbar or menu.

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