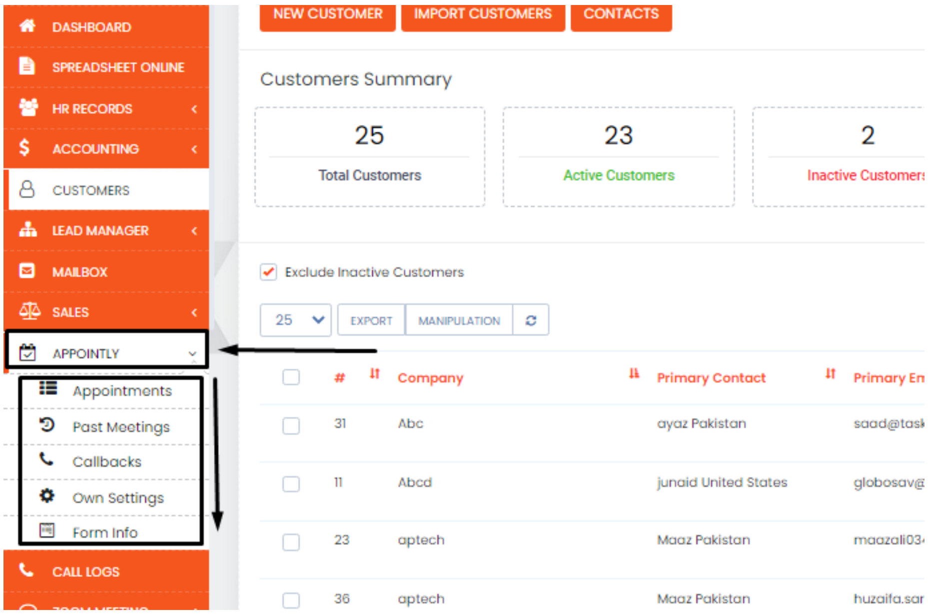
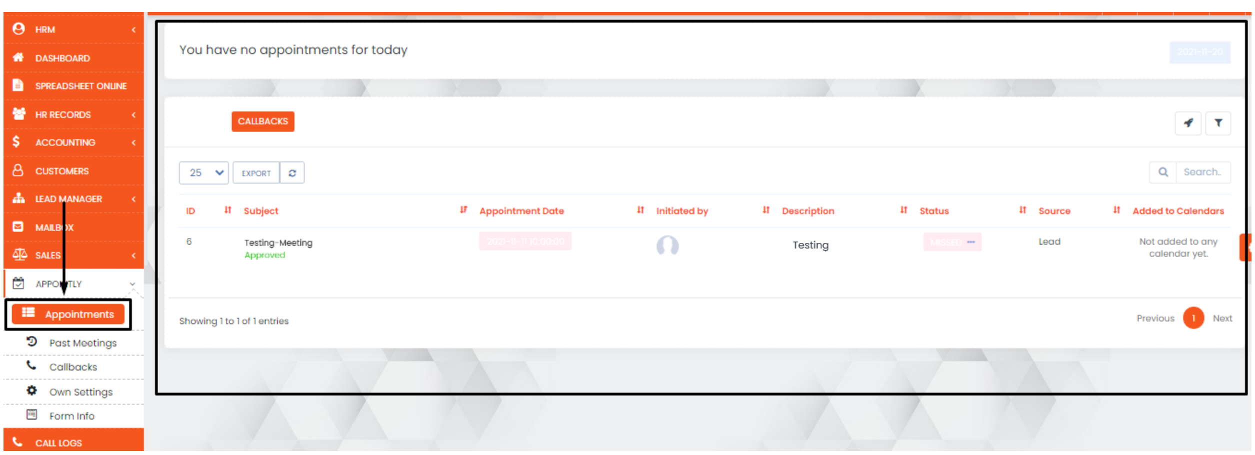
TABLE OF CONTENTS

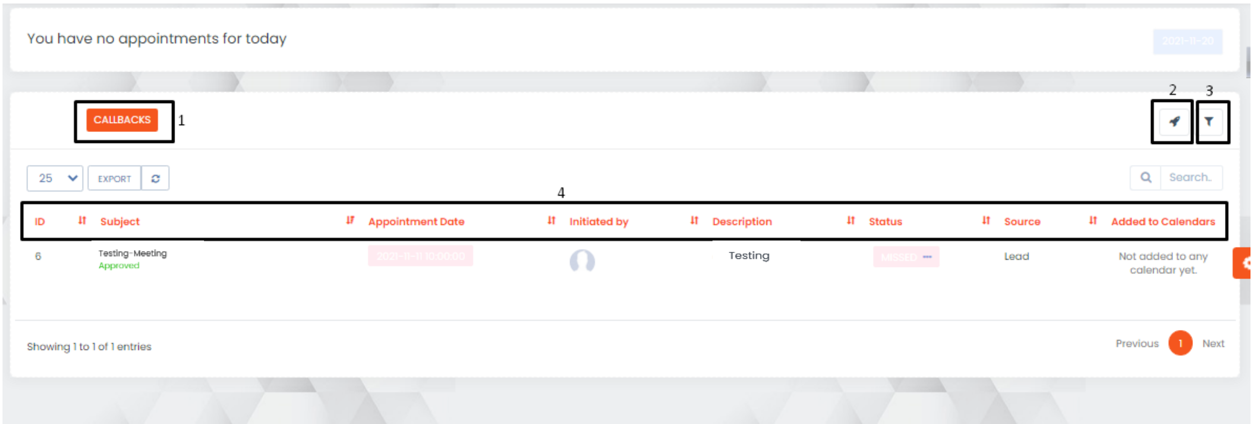


If you click Appointly, you will get a drop-down list.

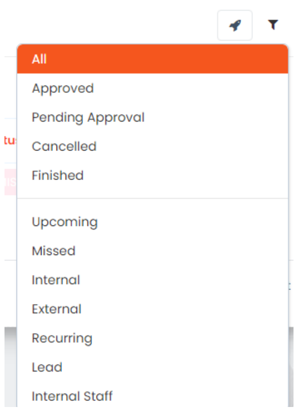
APPOINTMENTS



Once you click the Appointments, the above UI will be shown

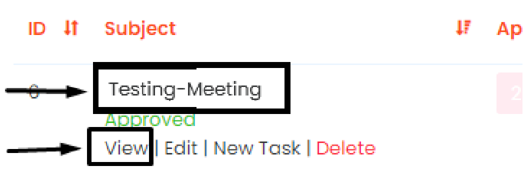


1. Clicking this button takes you to the Callbacks page.
2. To sign in with an outlook account, you can click here.
3. To filter the appointment list, click this icon. Then choose your desired fields you want to filter on.

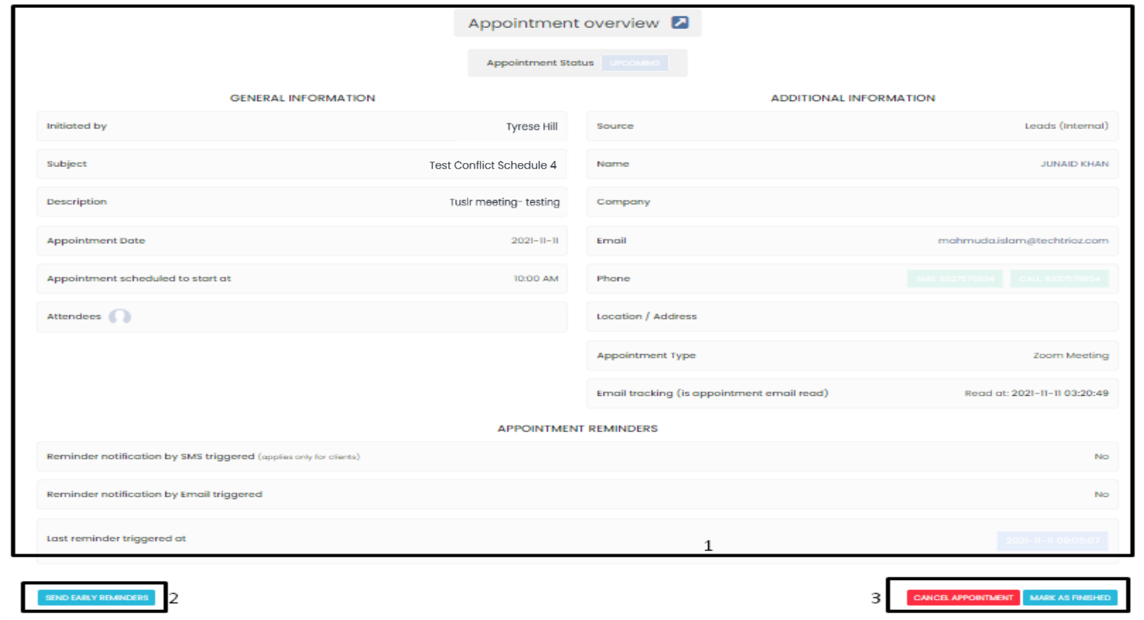


4. This portion shows the existing fields of the appointments listed down.

- VIEW SUBJECT



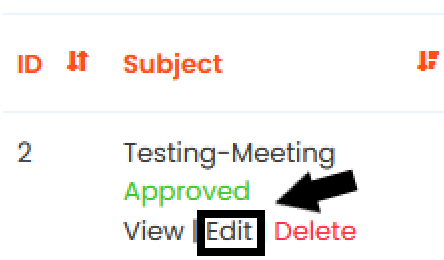
Clicking a specific subject or clicking the view option, will allow you to preview of the appointment.



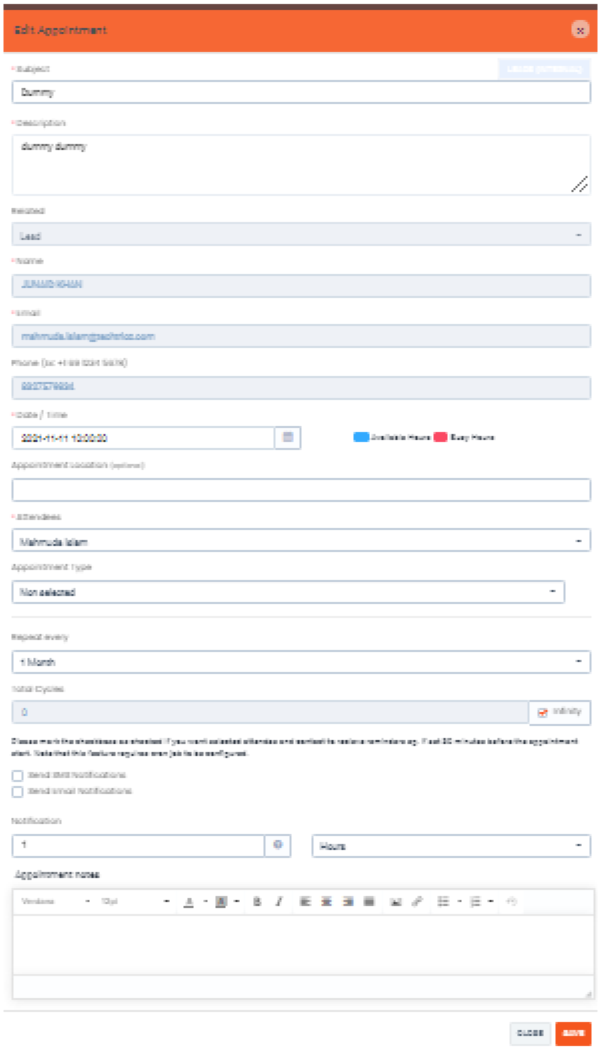
After clicking the subject, the above preview page will appear.

1. This portion shows the details of the appointment arranged.
2. Clicking this button allows you to send an early reminder through SMS or email to the clients or employees related to the appointment.
3. The "Cancel Appointment" allows you to cancel the appointment. The "Mark as finished" button allows you to mark the appointment as completed when the appointment is successfully conducted.

- EDIT SUBJECT



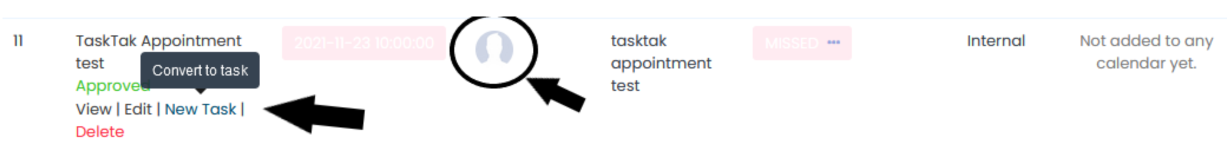
Click the "Edit" option to modify the details of the appointment.



Once the "Edit" option is clicked, edit the existing fields you are interested to change and finally click the "save" button.

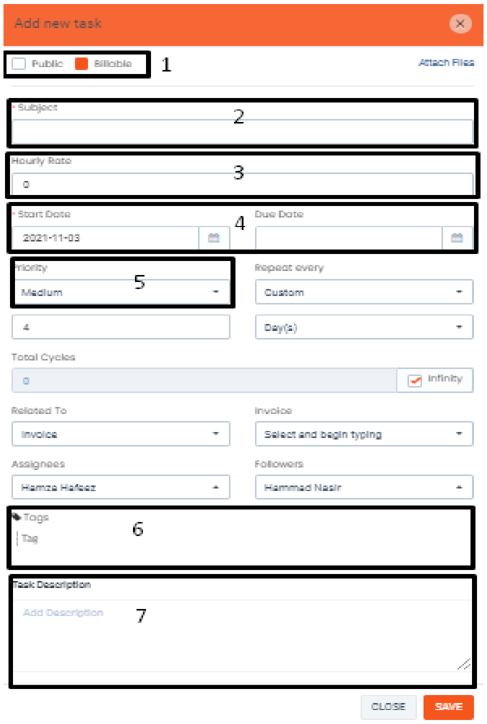
- CONVERT APPOINTMENT INTO A TASK

If you are included in an appointment you can hover under the appointment name and see "New Task". If you are not included in a meeting you will not see the task option. If you hover over the person icon you will see who initiated the meeting.



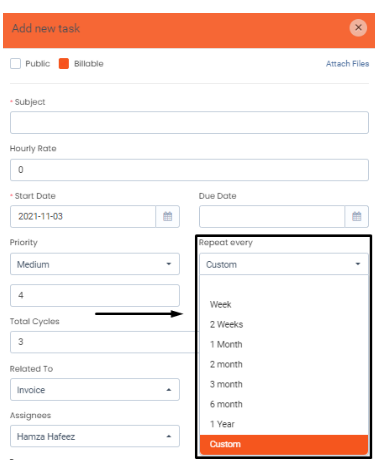
Once you click the "New Task" option, you will be able to fill the new task form to convert the appointment into a task.

The "New task" UI will allow the administrator to create new tasks for the staffs.

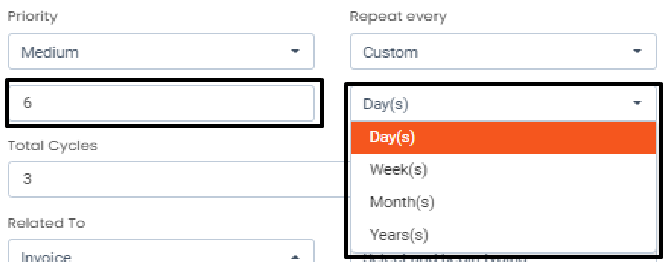


1. *Admin has the authority to set the tasks as public or billable, which means that the tasks can be viewed by either everyone or only by the task assignee.*
2. *Subject must be mentioned by the administrator to provide an overview of the task.*
3. *Hourly rate for completing the task can be mentioned by the admin.*
4. *The start and due date for each task can be set by the admin for the staffs.*
5. *Priority needs to be set to let the staff know about the importance level of the task.*
6. *Tags can be given to describe the task in short terms.*
7. *Task description must be written by the admin for the staff to know full details about the task. Admin can format the texts and provide alignments according to their choice. If required files can be inserted and tables can be generated.*

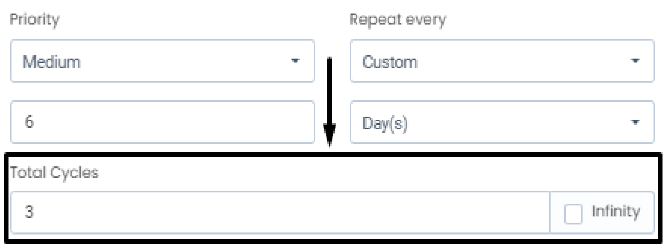
One of more files can be attached by the admin, if required.



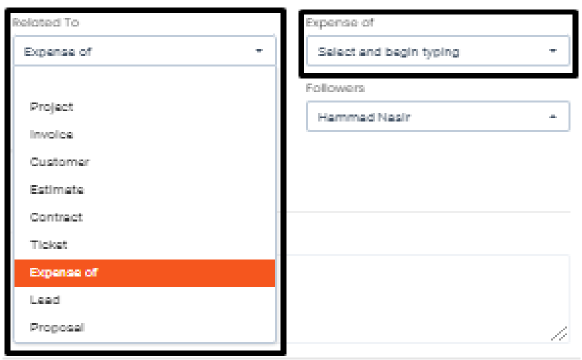
Task repetition can be set as a reminder to the staff that the task is still pending. It can be customized as well.



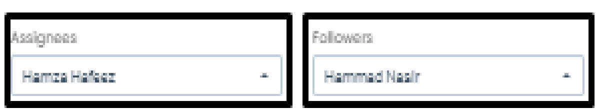
If required, the number of days, weeks, months, or years can be set by the admin for task repetition.



*Total cycles can be set, or infinity option can be chosen by the admin in order to repeat the task. The picture given above depicts that task will repeat in every 6 days for 3 times. So, the task will be conducted for 6*3=18 days.*



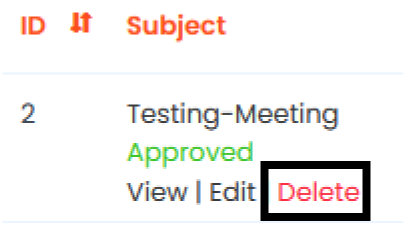
The task related to the type of group needs to be selected to make the staff understand under which group they are working on. After selecting the group from the dropdown, the name of the type of the subgroup needs to be searched and selected. This will help the staff to understand under which group and subgroup they are working on.



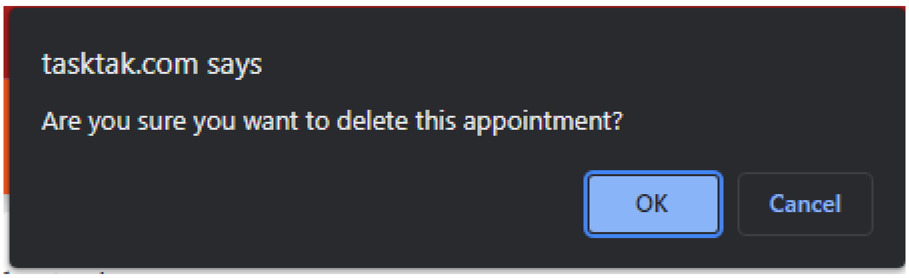
The assignees and followers must be selected to assign the task.

Afterwards the admin has to press "Save" the button if he/she wants to save the data. If not, the admin can select the "Cancel" button to dismiss the changes.

- DELETE APPOINTMENT

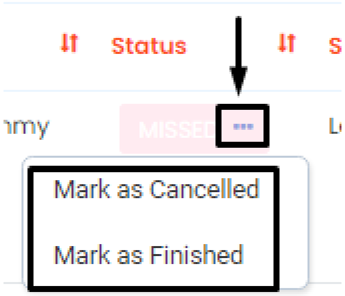


To delete the appointment permanently, click here.



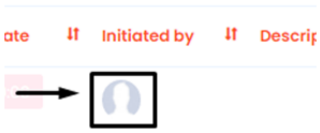
A confirmation message pops up after clicking the "delete" button. Click "Ok" to delete else click "cancel".

- MARKING STATUS

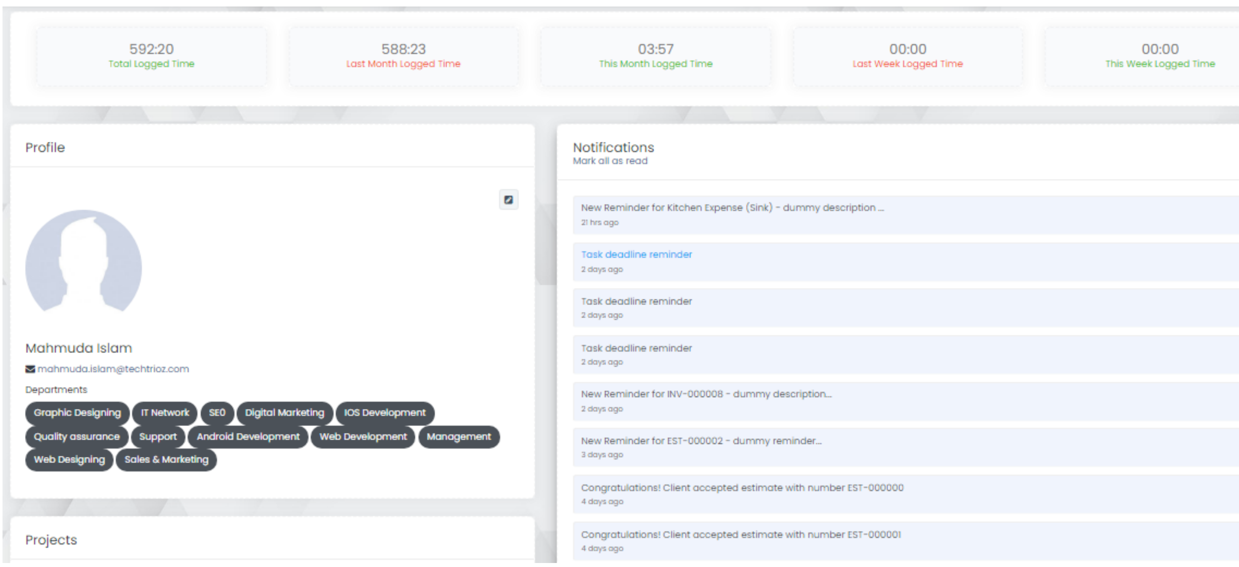


Click the 3 dotted icon to choose to mark the status as Cancelled or Finished.

- VIEW PROFILE OF THE INITIATOR



Once you click the profile picture of the initiator, you will be able to preview the background information about the initiator of the appointment.



After clicking, the preview of the selected profile opens in another page.