How to manage your appointments and change your calendar view

The Dashboard

In order to manage your appointments, you will need to open your **Dashboard**. Access to a weekly, monthly, daily and planning view, and a quick view of your newly booked appointments.

You can change your calendar view:

- *Daily*
- *Weekly*
- *Monthly*
- *Planning* (list of appointments)

Please note that both *Daily* and *Weekly* views support appointment drag&drop.

If you want to save this as your default view, click the small gear icon in the upper right and click **Set as Default View**.

Appointment Details

To view Appointment Details, click on an appointment from your **Dashboard** and click on an appointment to get a preview. This gives you some info at a glance like appointment time, the staff member assigned to the service, basic customer info, and the ability to mark a few statuses of the appointment's progress. You can also change its status and if it was paid by the client.

When switching an appointment to **Paid by Client**, a $ icon will help identify such appointment in the calendar view.

Clicking on the service's name (highlighted **in blue color** in the appointment preview), the platform will bring you to the **Appointment Details** screen, where you can see even more info about the client, comments and notes left by the customer, client history, the URL source of the booking (eg: Google, Facebook, your minisite, your website or backoffice), and a full list of appointment actions and statuses. You can also edit the appointment itself by clicking the **Edit** button in the upper right corner. For instance, you can choose to assign a different staff (*dispatch*) or to extend the duration if you expect it to be longer.

Note: cancelling an appointment cannot be undone.

Book an Appointment from the Dashboard

In your dashboard, click on blue square with the "**+**" to manually book an appointment. This will allow you to book a new appointment straight from the dashboard. Follow the steps of the appointment or staff that you have chosen to complete the appointment.
By booking from the Dashboard, you also have the ability to use "Free Mode" so break system logic and book outside of available hours.

Free mode

In the free mode interface, you can manually create an appointment, with complete control of date and time. You can also fine-tune:

- **appointment duration** (for instance to extend it if you know that *this* specific client will need one more hour)
- **recurring appointment** (only once, or every two weeks)

Create a personal appointment

If a staff needs to book a block of time for a personal appointment (eg: a training in the afternoon), it is possible to define it as a personal appointment with the free mode.

Please note that different types of appointments can be defined in **Dashboard** > **Scheduling** > **Settings** > **General Settings** (**All companies**)