# Image result for liverpool john moores university logo

# Process Document:

**CRM – Student Advice & Wellbeing**

Liverpool John Moores University

**CRM Activities: Appointments.**

Version 0.2. October 2018

Author: DS Business Support Team

**Adding an Appointment to a case in CRM**

Appointments should be **sent via Outlook first** and then the appointment added to CRM. CRM does not link to Outlook calendars or vice versa.You can add an appointment at any stage of the case.

1. In order to add an Appointment you must first ensure you are in a **Case** and not a Contact record. Check you are in a case by looking for the ‘chevrons’ which will appear along the top of the screen, as shown below.



1. To book an **Appointment**, navigate to the **Activities** section which can be found in the middle of the screen and click on the three dots (ellipsis) to reveal the menu:



1. Click on **Appointment.**

This will open up the **Appointment** form:



1. You will need to fill outthe following fields:
* **Subject:** For Counselling this will be the name of the student.
* **Start Time**
* **End Time**
* **Duration** Ensure the duration is accurate, as this will feed into Reporting.
* You may find **Outcome** useful to record whether the student **Attended**, was a **No Show**, or **Rescheduled**.
* You may also find it useful to record **Complexity.**
* There is also an option to add a **Description** of what was discussed if required.
1. Click **Save icon (found at the top of the Appointment form)**



1. The appointment will now show within the **Activities** section of the case in the centre of the screen, along with any other activities you create.
2. Remember that before **Resolving** the case, you will need to **‘Complete’** all activities, including **appointments**.
3. You can do this by clicking on to the activity, and clicking on the word **‘Complete’.**