

How to Book Participant Appointments

Step 1: Locate the Time Slot

1. Select the **Appointments** tab at the top of the screen.
 2. Use the calendar on the left to navigate to the desired date.
 3. Click the **green plus sign (+)** in the time slot you'd like to book.
-

Step 2: Select the Participant

The **Select Person** dialog will open. You have two options:

Option A: Search for an existing contact

1. Type the participant's name (or the first few letters) in the search field on the left.
2. Select the correct name once it appears.
3. Verify the contact information shown on the right.
4. Click **OK** to finalize the appointment.

Option B: Create a new contact

 If the participant isn't found:

1. Enter their **First Name**, **Last Name**, and **Email Address** in the fields on the left.
 2. Click the green **Add** button.
 3. Click **OK** to create the contact, then **OK** again to book the appointment.
-

Pro Tips for Scheduling

- **Partial searches work:** You don't need the full name — typing just the last name (or part of it) often finds participants faster.
 - **Verify before confirming:** Always double-check the email address on the right before clicking **OK**, to make sure confirmation emails go to the right person.
-

Revision #3

Created 2026-04-09 20:53:17 UTC by Tara Cicora

Updated 2026-06-21 20:43:34 UTC by Anne Taves