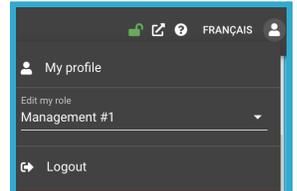


Reference Document - Management #1

The Management #1 role gives access to the Manage, Appointments and Schedules tabs. To view the Follow-Ups and Appointments tabs, please reference the Management #2 document.

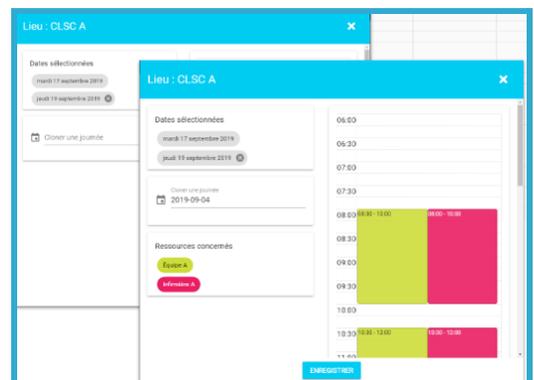
1. Go to the following URL: <https://admin3.clicsante.ca/login>
2. Log into the planner using your email and your password.



3. You can change your password and personal information in the profile tab.
4. In the taskbar on the left, click the *Schedules* tab. This menu will allow you to create or modify schedules.
5. Select the location to create a new time slot. Choose the view by week or day and click on the day.
6. To create a schedule: click on the start time. The window for opening a time slot will appear.
7. Be sure to adjust the start time and end time.
8. Identify the resource associated with this service. If your resource is a team, you can indicate the quantity of processing resources associated with this team.
9. Check the variety of services offered in the time slot and save.
10. You can copy/paste a time slot of your choice in the same place.
11. Check the day(s) to be created. Click on the cloning icon.



12. The schedule cloning window will pop up. Select the day to copy from the calendar. The time slots will be copied to the left column for reference. Save.



13. You can change a time slot at any time by double-clicking on the window. The edit window for the day will pop up. You can edit all the fields in the time slot. Save.
14. To move or copy a time slot with the cursor, select a time slot and drag it to the required location. A window will pop up. You can now choose to move or copy the time slot.
15. To check availability, open the filters. 

16. You can filter schedules by date, view types, services, locations, resources and periods. You also have three types of views available for the availability schedules: day, week and month.

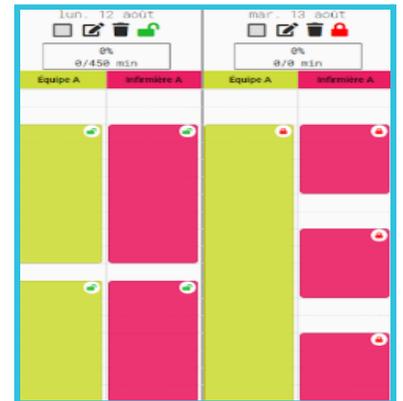


17. You can create an availability schedule without displaying all dates or time slots online. Padlocks allow you to manage availabilities online.

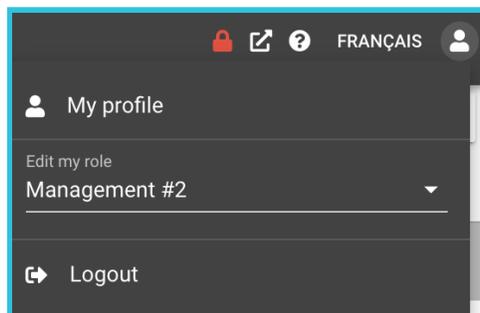
18. **Open periods:** A *green padlock* indicates that the time slot is available online. An appointment can be booked by a user and/or the admin.

19. **Locked periods:** A *red padlock* indicates that the time slot is not displayed online, only on the admin side. An appointment can be booked by the admin only.

20. **Day with both open and locked time slots:** An *orange padlock* indicates that at least one time slot is locked during the day.



21. To safely log out, use the user icon in the top right corner and click Log Out.



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 1-844-669-2474 or (418) 669-2474 ext. 1