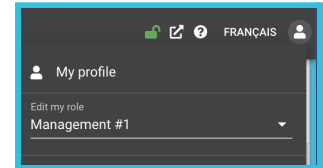# Reference Document - Management #3

*Here are the main actions that you can perform in order to manage your own appointments.*

1. Go to the following URL: https://admin3.clicsante.ca/login

2. Log in to the planner using your email and your password.

3. You can change your password and personal information in the My Profile tab.

4. In the taskbar on the left, click on the appointment tab. This menu allows you to create or modify appointments for users.
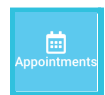
5. In week or day view, shaded areas in blue or green indicate areas open to the public and the administrator. Available hours will be grayed out. Areas shaded red indicate areas that are locked to the public but remain open to the administrator. Hours locked to the public will appear in bold red.
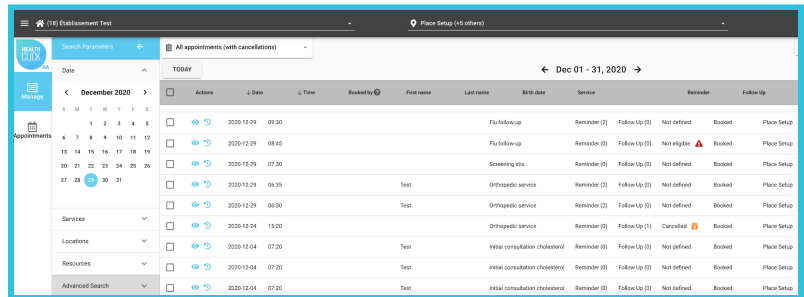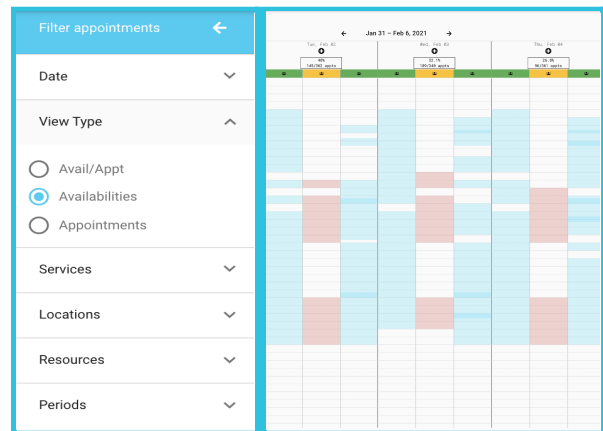
6. To quickly check available time slots: if the appointment filters are not open, click on the funnel icon to 🔽 . Then in View Type, select Availabilities to quickly see the remaining slots.

7. To register an appointment for a user: Click on the symbol ➕ on the required date. Choose the date. Then select:
   A. Type of service
   B. The location (if relevant)
   C. The time of the appointment.

Proceed to the next step and enter the client's personal information. By adding an email and/or cell phone, the boxes for sending the reservation confirmation are checked automatically. You can modify them if relevant. Save.

8. The appointment's confirmation and details are displayed. From this window you can modify ✏ the appointment , make a new appointment ➕ for the same user or print 🖨 the appointment details .

9. The Manage menu allows you to see your appointment list or search for a specific appointment.



10. Here is an overview of the Manage menu where you can perform the following:
   A. Obtain a list of reports
   B. Change the available view
   C. Filter appointments
   D. Export results
   E. Print results (maximum 100 at a time)

11. Check an appointment to mark the user for one of the following:
   A. Present
   B. Absent
   C. Confirm (the appointment)
   D. Remind (to do)
   E. Follow-up (customer)
   F. Cancel

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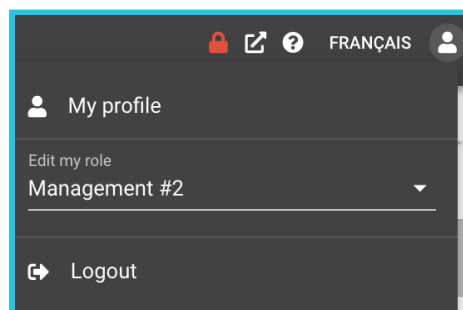


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