# Appointment Settings & Management

Overview

Set up your org's appointment scheduling settings so that advisors are empowered to individually manage their own availability. Track both the time that advisors have set aside as available for advising, and the time they actually spend advising—for ad hoc walk-in appointments as well as appointments scheduled in advance.
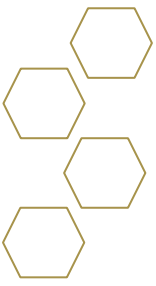
Considerations

1. Open the appointment manager, found on the webpage footer and clock the settings icon
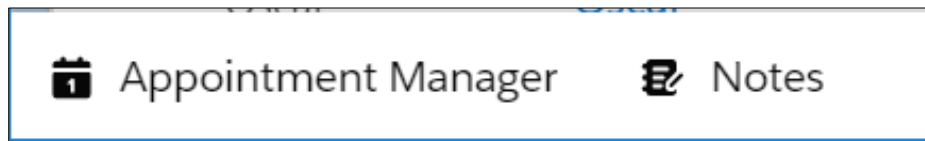
Set Up Event Record Types

Event record types are used to manage calendar data. Together with the Appointment objects, they distinguish between the types of time that advisors use to organize their days. Advising Event and Advising Time come with Advisor Link. The non-advising Event record type does not; you have to create it.

Event Record Type (Your Naming May Be Different)	What the Event Represents for an Advisor
Advising Event	"I'm booked with an advisee at this time." An advising appointment that has been scheduled in advance or a completed walk-in advising appointment. This record type is used along with the Appointment objects to track appointment Events.
Advising Time	"I'm available for advising at this time." A block of time that an advisor has designated as available for advising. The designation is specific about whether the availability is for appointments scheduled in advance or for walk-in appointments. Availability can be created as a one-off Event or a recurring series of Events. If an advisor hasn't designated any Advising Time Events, advisees won't be able to schedule any appointments with the advisor.
Non-Advising Event	"I'm not available for advising at this time." Any scheduled Event other than advising or availability for advising. Indicates the times when an advisor is not available for appointments because of other meetings, personal appointments, etc. If one of these Events overlaps with any scheduled availability, the Event overrides the availability. Advisor Link avoids scheduling appointments during non-advising Events.

Edit Appointment Availability

Appointment Settings

GENERAL SETTINGS

* Appointment Buffer (minutes) ⓘ

5

* Advance Notice (hours) ⓘ

1

Time Zone ⓘ

Eastern Standard Time

Record Type for One-Off Advising Availability ⓘ

Advising Time

LENGTH SETTINGS

Custom Appointment Lengths ⓘ

Disabled

* Default Appointment Length (minutes) ⓘ

30

- **Appointment Buffer** – Enter number of minutes.
- **Advance Notice** – Enter number of hours.
- **Default Appointment Length** – Enter number of minutes.

You can also customize appointment length by topic

LENGTH SETTINGS

Custom Appointment Lengths ⓘ   Enabled ✓⬤

Academic Advising

*Appointment Length (minutes)

| 30 |

☐ Customize by Subtopic

Career Advising

*Appointment Length (minutes)

| 30 |

☐ Customize by Subtopic

Academic Coaching

*Appointment Length (minutes)

| 30 |

☐ Customize by Subtopic

LOCATION SETTINGS

*Appointment Locations ⓘ

Where you meet with advisees. For example, "Porter Hall 1113B" or "By phone: (310) 555-1131"

In person	Remove
By phone	Remove
Web Meeting	Remove

Add A Location

Recurring Availability

Current and Future Availability
These recurrences are active and available for scheduling.

No recurring availability scheduled.