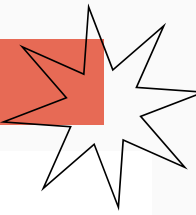


# MULTI-LOCATION NEW CALENDAR CHECKLIST



## STEP 1: CREATE MULTIPLE LOCATION CALENDAR VIEWS

- Decide what Location Combinations you would like to use.
- Turn on **Multiple Locations**:
  - Navigate to the **Schedule**, clicking the **Settings drop-down**, and selecting the **Multiple locations checkbox**.
  - Selecting this will allow you to select all locations or a combination of multiple locations from within the Location drop-down.
- Set the [Schedule Properties](#) for each Location Combination:
  - Navigate to the **Schedule**, select the Location combination, and click the Settings **Gear** icon.

**Example:** If you are a three (3) location practice then you will need to configure four (4) new views to optimize your use of this feature, including:

- Location 1&2
- Location 1&3
- Location 2&3
- Location 1, 2 & 3

- Select the **Staff/Resources**.
- Set the [Display Preferences](#):
  - Prime Time Hours: Confirm and/or update Prime Time hours for each location combination.
  - If you want your Display Preferences to be the *same across all Locations and Location combinations*, update the display preferences, then click **Save as Default**. This will save the Display Preferences setup ONLY for the remaining configurations.

## STEP 2: CONFIRM/REVIEW APPOINTMENT ZONES

- Ensure you are using [Appointment Zones](#) (required).
- Check that each provider has only a **single bookable appointment zone filled across all locations at any given time**.
  - Ensure the **purpose** of "In other location" zones are set to "Do Not Book".

## (OPTIONAL) STREAMLINE YOUR CALENDAR VIEW

Navigate to **Schedule** > Click **Settings** drop-down

- Timeslot names:** This checkbox is selected by **default**.
  - This will display the zone name as well as the color in each appointment slot.
- Appointment hints:** This checkbox is selected by **default**.
  - This will enable a popup when you hover over an appointment that displays the complete text of the appointment details.
- Hide Appointment Status section:** Select the checkboxes to hide appointments with the below statuses:
  - **No Show**
  - **Cancelled**
  - **Cancelled Same Day**
- Out of Office:**
  - Select this checkbox to show columns for providers or staff who are usually listed on the selected tab but do not have office hours scheduled on the selected date.

Update the Schedule Settings Enhancements for each schedule tab you have. Some practices have none, while others have several.

