

**PALM**  **TECH**

home inspection software

V E R S I O N 9

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# HOW TO:

## Edit/Update an Existing Appointment

**This step by step How To article explains how to add edit/update an existing appointment in the Palm-Tech Portal**

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# HOW TO: Edit/Update an Existing Appointment

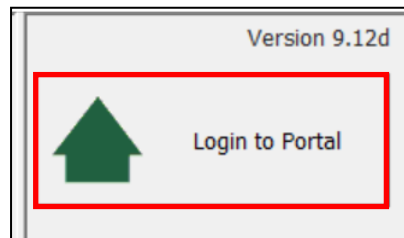
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The Palm-Tech Portal allows you to schedule appointments that you can attach to new inspection reports. The information you input in the appointment will then populate into the General Information category in your report. When you need to edit or update an appointment, follow the steps below.

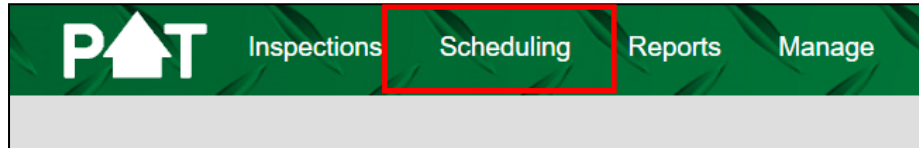
1. The first step is to login to the Portal. You can do this two ways; the first way is to follow this link:

<https://www.portal.palm-tech.com/account/login.php>

You can also access the Portal by opening the Palm-Tech software and clicking 'Login to Portal' on the right-hand side of the screen.

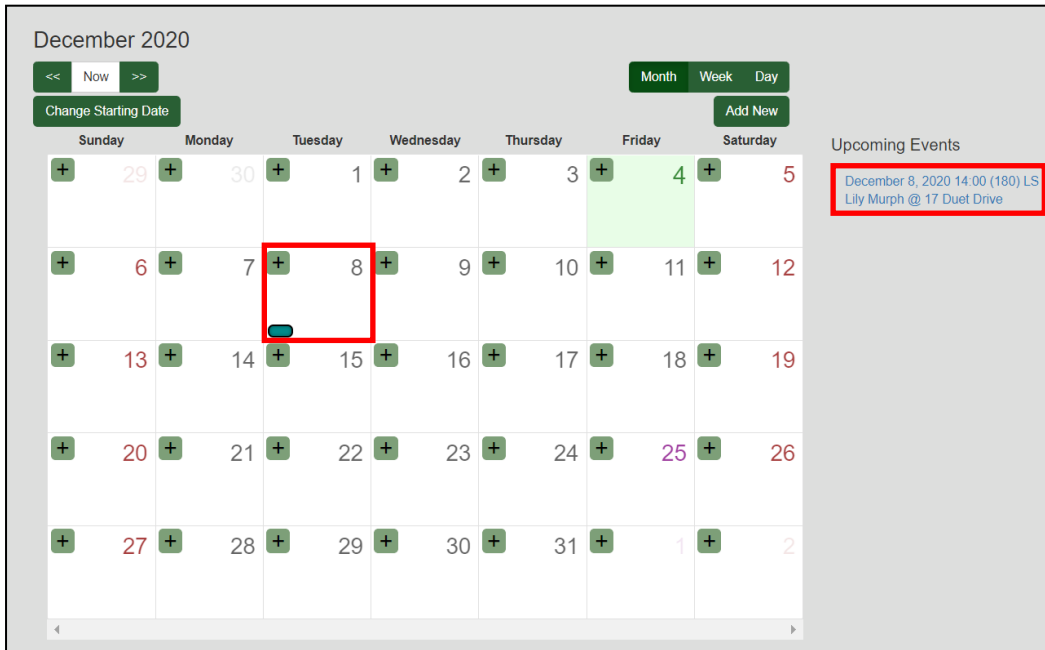


2. Once the Portal is open, click the "Scheduling" tab at the top.



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3. On this screen, you can see a monthly schedule of the appointments you have set. You can also see a list of upcoming appointments on the right-hand side of the screen under 'Upcoming Events.' To edit an appointment, navigate to its date on the calendar and select it by clicking the blue dash, or click on the appointment under Upcoming Events.



4. On this 'Edit Appointment' screen, you can edit/update the information attached to your appointment. In this example, we're going to change the appointment time from 2:00 PM to 2:30 PM.

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The screenshot shows the 'Edit Appointment' form. The 'Date and Time' field is highlighted with a red box and contains the text '2020-12-08 02:30 pm'. Other fields include 'Client Name: Lily Murphy', 'Referrer: Michelle Stevens', 'Location Address: 17 Duet Drive', 'Services: Home Inspection (checked), Wind Mit, 4 Pt, Standard (unchecked), Mold Inspection (unchecked)', 'Work to be preformed: Service(s): Home Inspection.', 'Scheduled Minutes: 150', 'Amount Due: 400', 'Amount Paid: 0', and 'Notes:'. At the bottom, there are three buttons: 'Update Appointment' (green), 'Return' (grey), and 'Delete Appointment' (red).

5. Once you've made your changes, click "Update Appointment" at the bottom of the screen.

This screenshot is identical to the previous one, but the 'Update Appointment' button at the bottom left is highlighted with a red box.

6. Your appointment changes will now be reflected in the Palm-Tech software and app.

The screenshot shows the Palm-Tech software interface. On the left, there are two buttons: 'Start New Inspection' and 'Open Existing Inspection'. On the right, there is a 'View My Schedule' button and an 'Appointments' list. The list contains one entry: '12-08 14:30 - Lily Murphy - 17 Duet Drive', which is highlighted with a red box.