

Creating a Follow-up Appointment

There are a number of related **Job** functions in II which will save you some time in creating certain additional **Jobs** as information is copied or inherited from the original **Job**; the first of these is a Follow-up Appointment.

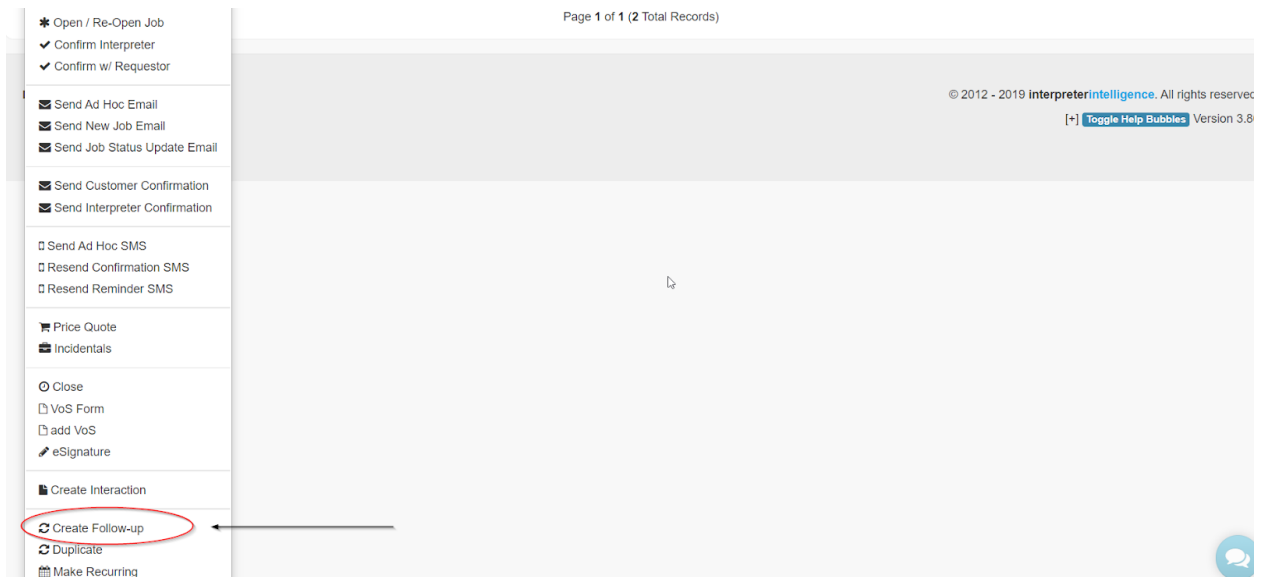
The Follow-up Appointment function is useful when you wish to create a single follow-up **Job** for the same **Customer**, **Client** and **Consumer** i.e. **if all parameters on the job are the same as the original with the exception of the scheduled time for the appointment**. Everything above the **Calendar** section of the original **Job** will be copied to the Follow-up Appointment/**Job**.

You can create a Follow-up Appointment in a number of ways:

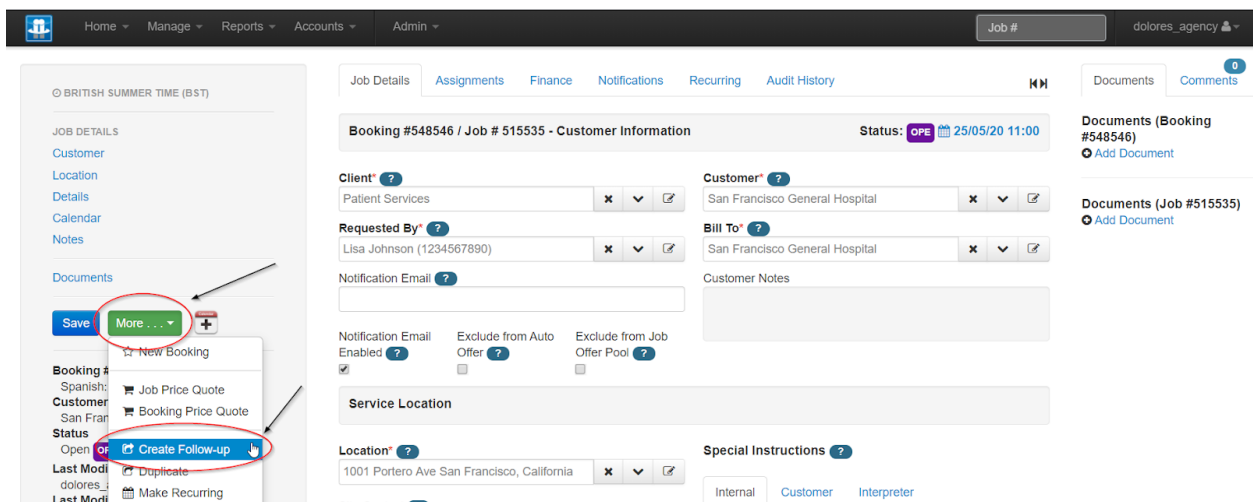
- Navigate to the '**Home**' menu and select '**Manage Jobs**'.
Quick tip: a link to 'Manage Jobs' can also be found in the Quick Links section of your default home page - The Dashboard
- Find the original **Job** from which the Follow-up will be created, click on the drop down menu beside this **Job** and select **Create Follow-up**

The screenshot shows the 'Demo Agency Jobs' interface. At the top, there are navigation menus: Home, Manage, Reports, Accounts, Admin, and a search bar for 'Job #'. Below the navigation, there are buttons for 'Create New Booking', 'Create New Contact', 'Create New Customer', and 'Create New Consumer'. The main content area shows a table of jobs with columns: ID, Date, Time, Customer, Location, Lng, Language, Stat, Interpreter, Team Size, Reference, Requirement, Type, and Bkg. Tm. A dropdown menu is open for job ID 515535, showing options: View More, View (in full), Edit (in full), Assign Interpreter, Unassign Interpreter, and View Offers. The table contains two rows of job data.

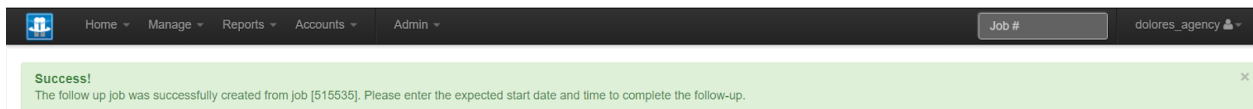
ID	Date	Time	Customer	Location	Lng	Language	Stat	Interpreter	Team Size	Reference	Requirement	Type	Bkg. Tm.
515535	25/05/20	11:00	San Francisco General Hospital	1001 Portero Ave, San Francisco, California	spa	Spanish	OPE		1	Patients Name: 123	-		11:01
		10:00	A translation	Hampstead Heath, London Borough of Camden, London NW3, UK	bfi	British Sign Language	OPE		1	Patients Name: Test (+1 other)	-		00:42



- Alternatively, if you are already viewing or editing the **Job**, click on the green **More** button in the navigation pane to the left hand side and select **Create Follow-up** from that menu.



- The new follow-up **Job** will then be created, note that you will receive a success message at the top of the page indicating that the follow-up **Job** was created and instructing you to fill out the schedule information for this job.



- Note how all info above the **Calendar** is copied from the original **Job**; all info in the **Calendar** section must be populated and you can also add notes specific to this new **Job**.

- When the **Calendar** info has been populated for the follow-up **Job**, save the new **Job** by selecting the blue **Save** button at the bottom of the page

You can then Navigate to the **Recurring** tab on the **Job** to view all **Jobs** that are related to that which you are viewing. Note the **Booking #** and **Job #**; all related jobs will share the same **Booking #** but each and every **Job** in II will have a unique **Job #**.

Note that you can take actions on individual **Jobs** using the cog wheel drop down beside the relevant **Job**. If you make certain changes to a single **Job** (i.e. anything that is not part of the **Booking** level info - **Calendar** section and below) that has others related, you will receive a pop-up box asking if you wish to make the changes to only that **Job** or others, this gives you the flexibility to change the schedule on any or a select number of related **Jobs**.

The exception to this rule is '**Service Type**' which resides above the **Calendar** section, in the **Appointment Details** section. In a recent improvement to the system, the '**Service Type**' can be changed at both **Job** level and **Visit** level (**Team Jobs** which will be covered in more detail in another topic) without affecting all **Jobs** under that **Booking**.

Update Recurring Job



Would you like to **change** only this job, all jobs in the series, or this and all jobs following in the series?

Note: Only jobs that are **not verified** will get updated

There are **6** jobs in total in the recurring series.

Only this job

All other jobs in the series will remain the same.

Following jobs

This and all the following jobs will be changed. Any changes to future jobs will be lost.

All jobs

All jobs in the series will be changed. Any changes to other jobs will be lost.

Cancel this change

At anytime can use the Quick search function at the top of all II screens to search by **Job #** or **Booking #** and as always you can navigate to the **'Manage Jobs'** page to follow-up on any **Jobs**.

In the next modules we will cover some more related job functions.