What is an Appointment? How Manage Appointments in the CRM?

What Is an Appointment?

Appointments are used to schedule meetings, events, and other planned activities with leads.

They help realtors organize their schedule, keep track of upcoming engagements, and receive reminders for important meetings and events.

Appointments are managed from the lead profile.

View Appointments

1. Navigate to **CRM**.
2. Open the desired lead profile.
3. Scroll to the **Appointments** section.

The Appointments section displays all appointments associated with the lead.

Create an Appointment

1. Navigate to **CRM**.
2. Open the desired lead profile.
3. Scroll to the **Appointments** section.
4. Click The **Plus** button.

The Add Appointment window will appear.

5. Enter the appointment title.
6. Enter a description for the appointment.
7. Specify the appointment location.
8. Select the appointment date.
9. Select the start time.
10. Select the end time.
11. Configure the reminder settings.
12. Click **Save**.

The appointment will be created successfully.

The appointment will also be displayed on the Calendar on the scheduled date and time.

Edit an Appointment

1. Locate the appointment you want to modify.
2. Click **Edit**.
3. Make the required changes.
4. Click **Save**.

The appointment will be updated successfully.

Delete an Appointment

1. Locate the appointment you want to remove.
2. Click **Delete**.
3. Confirm the deletion.

The appointment will be deleted successfully.

You have successfully learned how to create and manage appointments in AgentRoof CRM.

Revision #6
Created 2026-06-15 07:00:42 UTC by AgentRoof
Updated 2026-06-19 05:22:07 UTC by AgentRoof