Appointments

The CM allows you to make appointments within the system to help you keep track of your schedule. Schedule a meeting, a presentation, a follow-up phone call, etc. Make sure to complete the required information, including the account the appointment is associated with. You can also assign that appointment to a PinPoint user. Use the search bars below to filter your appointments by type, day, etc.

Begin by clicking Contact Management in the user menu on the left side of PinPoint, then click Appointments.

Add Appointment

1. Click the Add Appointment button.
2. Enter a Title for the appointment.
3. Select the Account you want the appointment assigned to.
4. Fill in any other information needed for the appointment, then click Save.

Schedule Appointment

1. Under the Action column, click the Schedule Appointment button next to the appointment.
2. Click Yes to confirm.

Add Notes

1. Under the Action column, click the Notes button next to the appointment.
2. Enter your message, then click Save.