Review the Appointment Inquiry

How to Review the Appointment Inquiry in Muhasib ERP

Overview

This guide will help you find an appointment, check its schedule and status, and determine its next authorized action.

You get the appointment's source-level state and avoid duplicate conversion.

Who can do this

You need access to Appointment Inquiry plus appointment, customer, staff, and linked-sale view rights.

Before you start

Have appointment/reference, customer, date/time range, location, staff, status, or linked sale.

> Before saving, check that the correct company is open and that you have permission to complete this task.

Where to find it

Back Office → Sales & Customers → Appointment Inquiry.

Review the Appointment Inquiry

Step 1: Set company, date/time, location, and status filters

Step 2: Search by appointment/customer/staff/reference

Step 3: Open the exact appointment

Step 4: Review customer, schedule, services/items, staff, notes, and status

Step 5: Check linked sale/conversion

Step 6: Choose update, conversion, or other approved follow-up

Check your work

Inquiry detail agrees with Appointment Dashboard and any linked sale.

> Take a moment to check your work before closing the window. This small check can save time later.

If something goes wrong

- Confirm timezone and inclusive date boundaries.
- Search Sale Inquiry before converting again.

Related guides

- Review the Appointment Dashboard
- Create an Appointment
- Convert an Appointment to a Sale

What to do next

> **Review the Appointment Dashboard**.

Revision #0
Created 2026-09-04 09:21:00 UTC by Shah Rukh Saeed
Updated 2026-09-07 10:14:00 UTC by Shah Rukh Saeed