Create an Appointment

How to Create an Appointment in Muhasib ERP

Overview

This guide will help you schedule a customer appointment with the intended services/items, staff, time, and status.

Muhasib creates an appointment for dashboards/inquiries and later conversion. Company settings determine default and conversion statuses.

Who can do this

You need access to Appointment/Pos Appointment Entry plus customer, item, and staff selection rights.

Before you start

Create appointment statuses, customer, services/items, staff, and availability; define deposit/payment policy.

> 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 → New Appointment, or POS sale type → Appointment.

Create an Appointment

Step 1: Start a new appointment

Step 2: Select customer/contact/address

Step 3: Enter scheduled date/time and notes

Step 4: Select services/items and assigned staff

Step 5: Select the intended status

Step 6: Review price/tax/deposit where supported

Step 7: Save once

Check your work

Find it in Appointment Dashboard/Inquiry and confirm schedule, customer, staff, lines, status, and absence/presence of deposit effects.

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

If something goes wrong

- Do not duplicate an appointment after uncertain save.
- Confirm time zone and staff assignment.

Related guides

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

What to do next

Convert an Appointment to a Sale.

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