

# Client Appointments

## Client Appointments

To access client appointments you need to log-into the system as an agency.

- Go to **freshstartfurniturebank.org**
- Select **For Agencies** from the menu bar
- Scroll down to Hudson in the city list
- Select **FSFB**
- Select your name
- Log in



**Submit a Referral**



**Schedule or  
Cancel an  
Appointment**



**Create an Account**

Create an account for  
another team member.



**Update Account**

Update your contact  
information



**Log O**

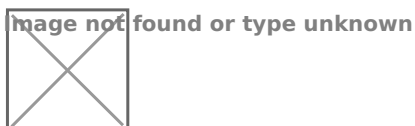
## To schedule or cancel an appointment

- Scroll down to the icons at the bottom of the page.
- Click on **Schedule Appointment or Cancel an Appointment.**
  - It will bring you to the **Main Menu** where all open referrals are listed.

Use the button(s) in the Action column to schedule or cancel an appointment.

| Client                               | Appointment                  | Action                                |
|--------------------------------------|------------------------------|---------------------------------------|
| <a href="#">AA, AA</a>               |                              | <button>Schedule Appointment</button> |
| <a href="#">Abel, Melissa</a>        |                              | <button>Schedule Appointment</button> |
| <a href="#">Alladawi, Heba</a>       | Sat, 12 Aug 9:30             | <button>Cancel Appointment</button>   |
| <a href="#">Alvarez, Angelica</a>    |                              | <button>Schedule Appointment</button> |
| <a href="#">Anderson, Stewart</a>    | Tue, 15 Aug 9:15             | <button>Cancel Appointment</button>   |
| <a href="#">Antonowicz, Thomas</a>   |                              | <button>Schedule Appointment</button> |
| <a href="#">Bafaya, Fabrice</a>      | Tue, 15 Aug 9:15             | <button>Cancel Appointment</button>   |
| <a href="#">Barbosa, Maria</a>       |                              | <button>Schedule Appointment</button> |
| <a href="#">Batesgross, Shakiyah</a> | Sat, 12 Aug 9:30             | <button>Cancel Appointment</button>   |
| <a href="#">Berrabah, Nassim</a>     | Tue, 15 Aug 9:15             | <button>Cancel Appointment</button>   |
| <a href="#">Bilorio, Audrey</a>      | Sat, 5 Aug 9:30<br>(Visited) |                                       |

## To cancel an appointment



- Select the **Cancel Appointment** button.

## To schedule an appointment:

- Click on **Schedule Appointment** button
- A list of available appointment dates will be shown
  - If no dates appear, the referral will close before an appointment is available.
- Select the desired appointment date
- Select the appointment time
- Click the **Schedule Appointment** button.

# Schedule Appointment for AA AA

Step 1: Select the date that AA AA will come in to pick up their furniture:

Select an appointment date ▼

Select an appointment date

Thursday, 10-August

Saturday, 19-August

Tuesday, 22-August

Thursday, 24-August

Saturday, 26-August

Tuesday, 29-August

Thursday, 31-August

Main Menu

- Once the appointment is scheduled, you will go back to the Main Menu.
- Below you can see that an appointment for AA AA was scheduled for August 31st at 9:15.

## Client Appointments

Use the button(s) in the Action column to schedule or cancel an appointment

| Client                | Appointment      | Action               |
|-----------------------|------------------|----------------------|
| ,                     |                  | Schedule Appointment |
| <u>AA</u> , <u>AA</u> | Thu, 31 Aug 9:15 | Cancel Appointment   |

- If you click on the client's name, it will bring you to the Client Detail page.

# Client Details

Referral 8853 was submitted on 2023-06-20 and expires on 08/31/2023 Internal Use: ☐

First name:  Last name:

Address:   Apt:

City:  State:  ZIP:

Phone:  Allow SMS: ☒

Email:

Adults:  Children:

Primary Language:

Update

Resend Welcome Messages

Extend Referral

Close Referral

Notes:

|                     |  |  |
|---------------------|--|--|
| 2023-08-09 15:58:22 |  | Appointment scheduled for Thursday, August 31, 2023 9:15 AM by Kate Halp |
|---------------------|--|--|

## Extending a referral

If you need to extend a referral:

- Open the client's referral
- Press the **Extend Referral** button,
  - This will extend the referral by 15 days one time.
  - If you need to extend the referral longer, edit the "Expire on" field and **Update** the referral.
- Go back to the main menu and refresh the page.
- You should now be able to make an appointment.