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TASKTAK USER GUIDE – APPOINTLY

The screenshot shows the TaskTak Appointly interface. On the left is a sidebar with various menu items: DASHBOARD, SPREADSHEET ONLINE, HR RECORDS, ACCOUNTING, CUSTOMERS, LEAD MANAGER, MAILBOX, SALES, APPOINTLY, and CALL LOGS. The APPOINTLY menu is expanded, showing a drop-down list with options: Appointments, Past Meetings, Callbacks, Own Settings, and Form Info. The main content area displays the 'Customers Summary' dashboard. At the top, there are buttons for 'NEW CUSTOMER', 'IMPORT CUSTOMERS', and 'CONTACTS'. Below these, the 'Customers Summary' section shows three boxes: 'Total Customers' with the value 25, 'Active Customers' with the value 23, and 'Inactive Customers' with the value 2. Below the summary, there is a checkbox for 'Exclude Inactive Customers' which is checked. There are also buttons for '25' (a dropdown), 'EXPORT', 'MANIPULATION', and a refresh icon. At the bottom, there is a table with columns: '#', 'Company', 'Primary Contact', and 'Primary Email'. The table contains five rows of customer data.

#	Company	Primary Contact	Primary Email
31	Abc	ayaz Pakistan	saad@task
11	Abcd	junaid United States	globosav@
23	aptech	Maz Pakistan	maazali03@
36	aptech	Maz Pakistan	huzailfa.sar

If you click Appointly, you will get a drop-down list.

OWN SETTINGS

The screenshot shows the 'Own Settings' page in the TaskTak Appointly interface. The sidebar on the left is the same as in the previous screenshot, but the 'Own Settings' option is highlighted. The main content area is titled 'Your Appointments Settings'. It contains several settings sections: 'Show appointments summary in appointments dashboard' with radio buttons for 'Yes' and 'No'; 'Default appointments table filter (if this option is left blank default table filter will be set as Approved)' with a dropdown menu showing 'Non selected'; 'Appointment Type' with a button 'ADD APPOINTMENT TYPE'; and 'Zoom Meeting' and 'Phone Call' sections. The 'Zoom Meeting' section has a text input field with the value '#be8c9f' and a 'SAVE' button. The 'Phone Call' section has a text input field with the value '#70d5ff' and a 'SAVE' button.

After clicking the “Own Settings” option, the above page will get loaded.

Your Appointments Settings

1

Show appointments summary in appointments dashboard
☐ Yes ☐ No

2

Default appointments table filter (if this option is left blank default table filter will be set as Approved)
 Non selected

Appointment Type

3

ADD APPOINTMENT TYPE

Zoom Meeting 4 5 Phone Call 4 5

#be8c9f #70d5ff

SAVE 6

1. If you want to allow the appointment's summary to be shown in the appointment's dashboard, then click "Yes" else "no".
2. This option allows you to add more fields to filter.

Default appointments table filter (if this option is left blank default table filter will be set as Approved)

Non selected

|

All

Approved

Pending Approval

Cancelled

Finished

Upcoming

Missed

3. This button allows you to add a new appointment type. Enter the appointment type name and choose the color you would like to represent that meeting. This color will be shown in your calendar to help you keep track of which meetings you have easily.

ADD APPOINTMENT TYPE

Appointment type name

Calendar event color

#8a2b2b

CLOSE SAVE

4. In our demonstration we currently have zoom meetings and phone calls as options to choose from. You can edit the color by clicking the color code underneath your current meeting types to represent your meetings.
5. This button allows you to delete the existing appointment type.
6. Finally, click the "save" button to update the changes successfully.

