Adding a Client and Visit Schedule

Client Area · https://cclearninghub.co.uk/docs/adding-a-client-and-visit-schedule/

Admin Adding a Client and Visit Schedule

This guide will cover adding a client and building their visit schedule.

Please follow the interactive guide below, a written guide is also available at the bottom of the page.



Embedded media:

https://demo.arcade.software/L04z0xOpDZAvhb0tXFC2?embed&embed_mobile=tab&embed_desktop=inline&show_copy_li

Written guide

1. Enter the **Admin App.**
2. Select **Visit** in the **Client Area** box.
3. Now select **Visit** in the **Add New Client** box.
4. Enter all of the details of the client. The items with an asterisk are mandatory fields.
5. Ensure the post code and address is correct to ensure geo-locating is active.
6. Select **Create new contract**.
7. Enter the details required with an asterisk and then select **Build Visit Schedule.**
8. Choose the role that will be performing the visit.
9. Select the template and **Create New Template.**
10. Input the **Start Time** and **End Time** for the visit.
11. Choose which days the visit will take place.
12. Select **Add to List.** You can add multiple visits to the same list.
13. **Save Visit Schedule** when done.
14. Once you are happy that the client’s details are correct click **Save New Client.**