How to Book a Pre-Assessment on Cloud

CRM · https://cclearninghub.co.uk/docs/how-to-book-a-pre-assessment-on-cloud/

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Kieran Worth

This guide explains how to book a pre-assessment within the CRM app. From the Dashboard, you can access an enquiry, review the details provided, and schedule a pre-assessment appointment with the prospective service user.

You will be able to select the date and time, confirm or amend the appointment address, assign a staff member, and record any additional attendees. Once submitted, the pre-assessment will be scheduled and recorded against the enquiry.

Following these steps ensures pre-assessments are arranged accurately and all relevant information is captured to support a smooth onboarding process.

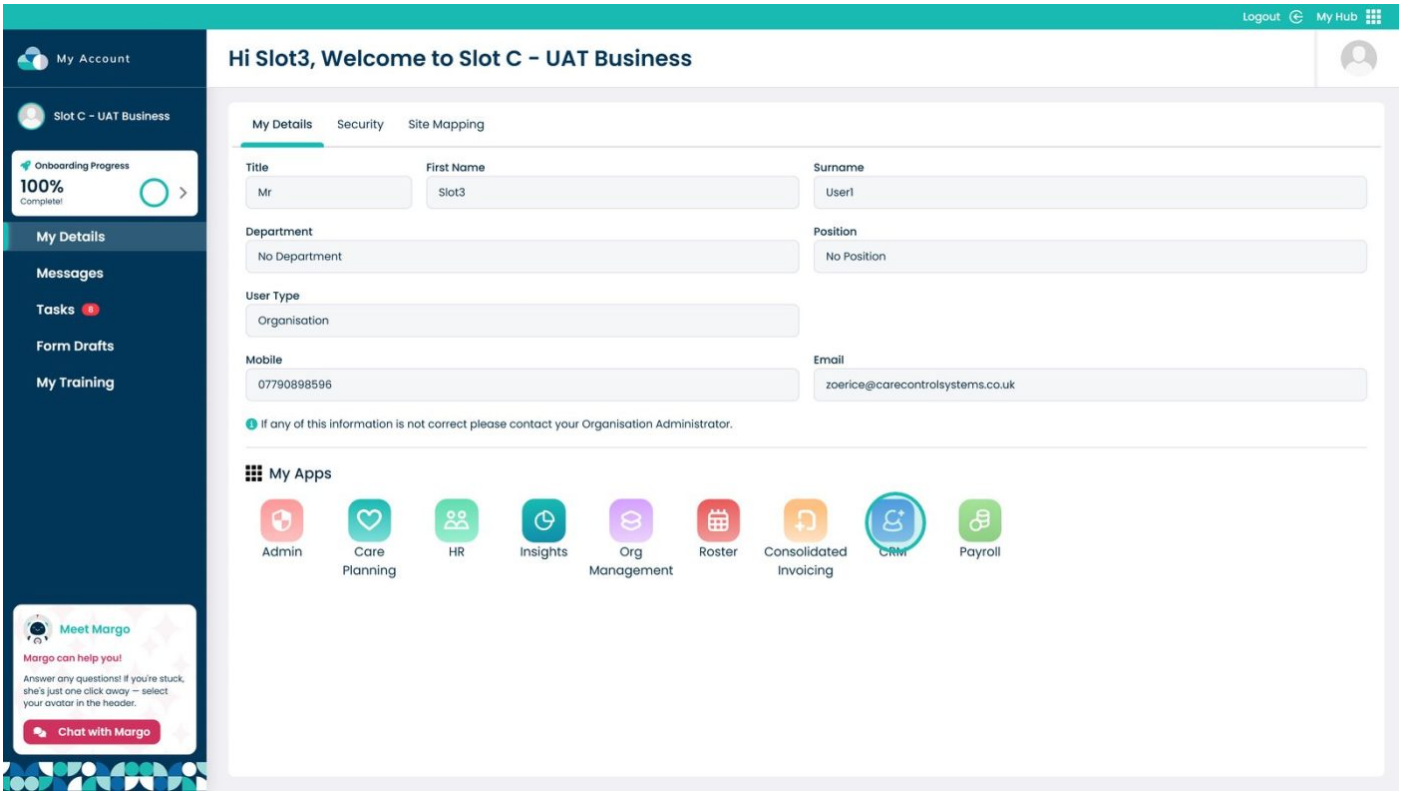
Interactive Guide

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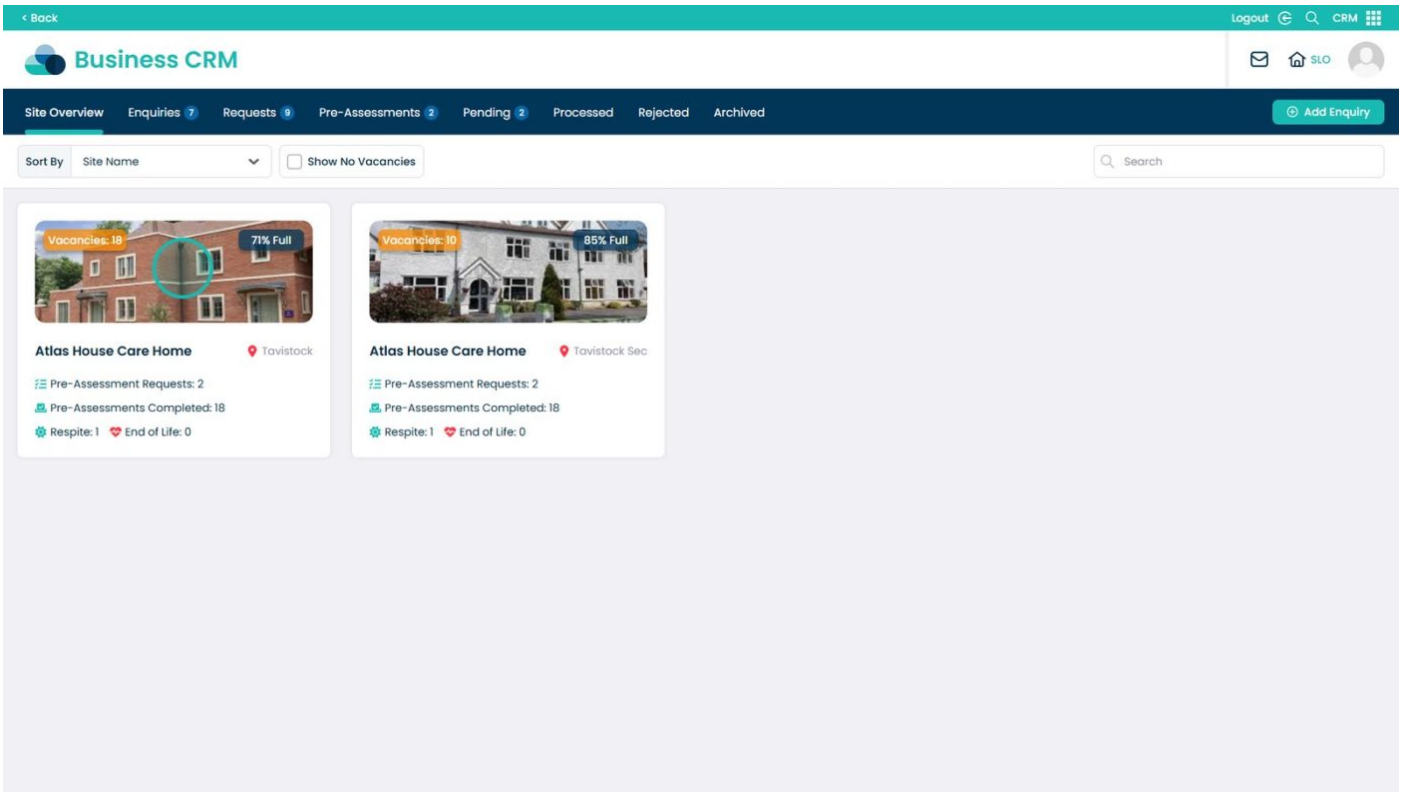
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Text based guide

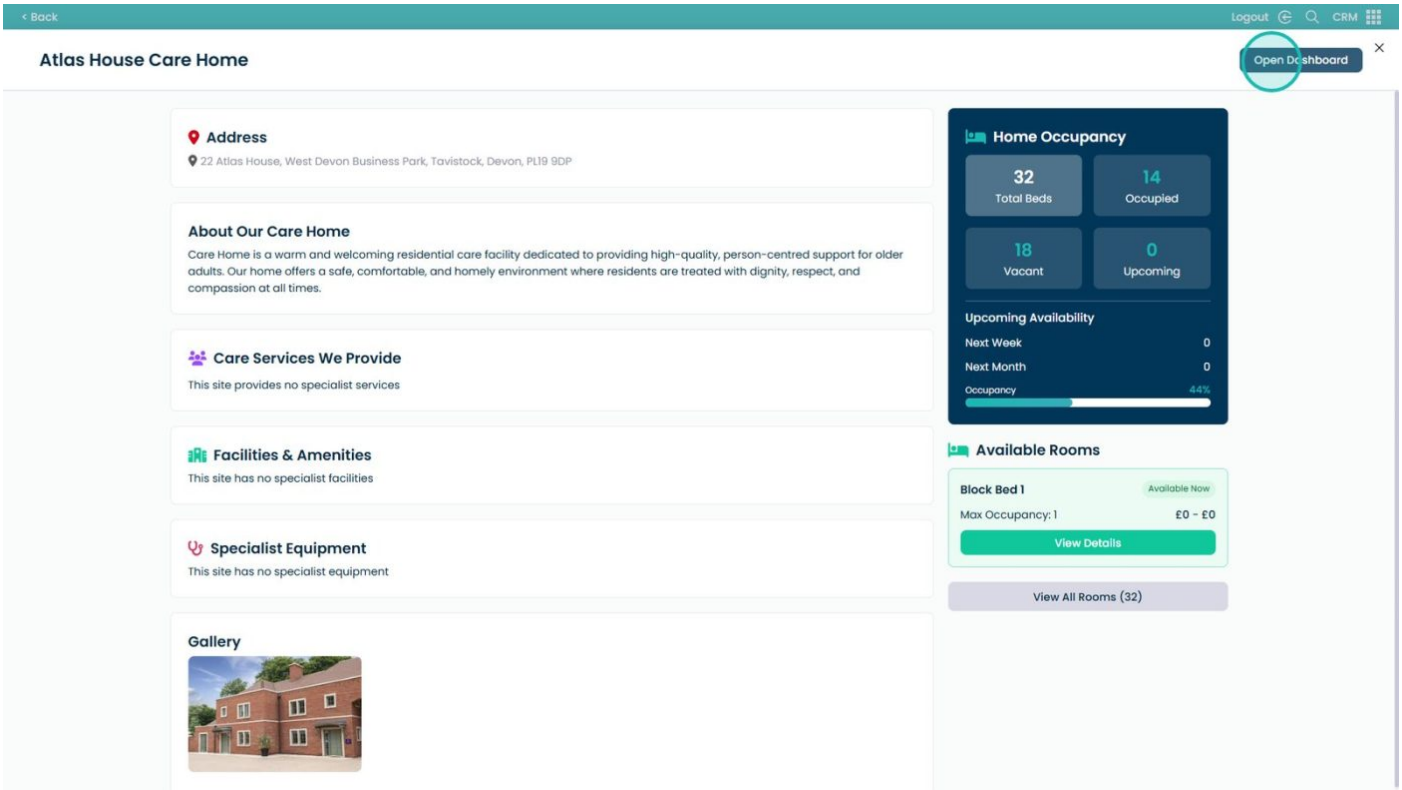
Enter the CRM app



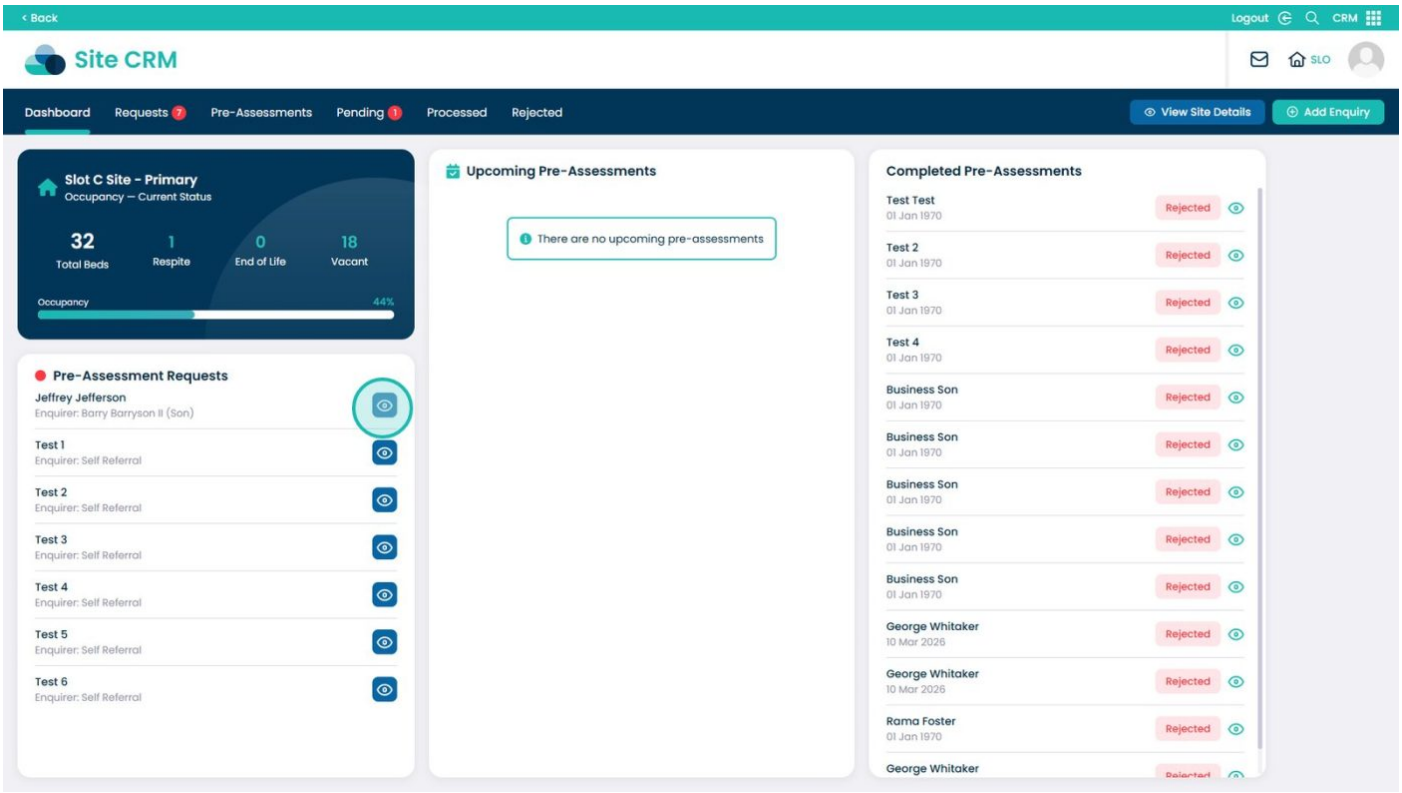
Choose the site you wish to view



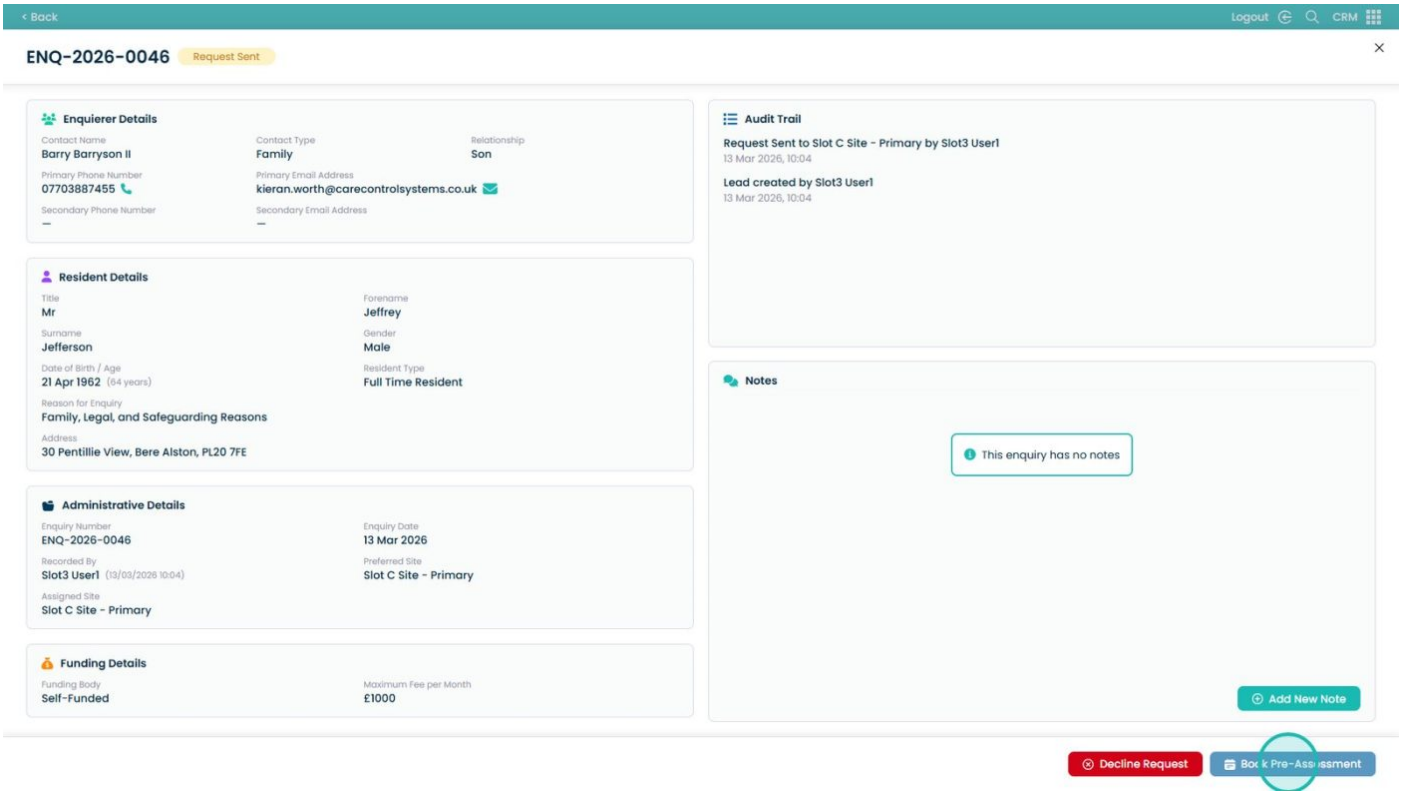
Open the dashboard



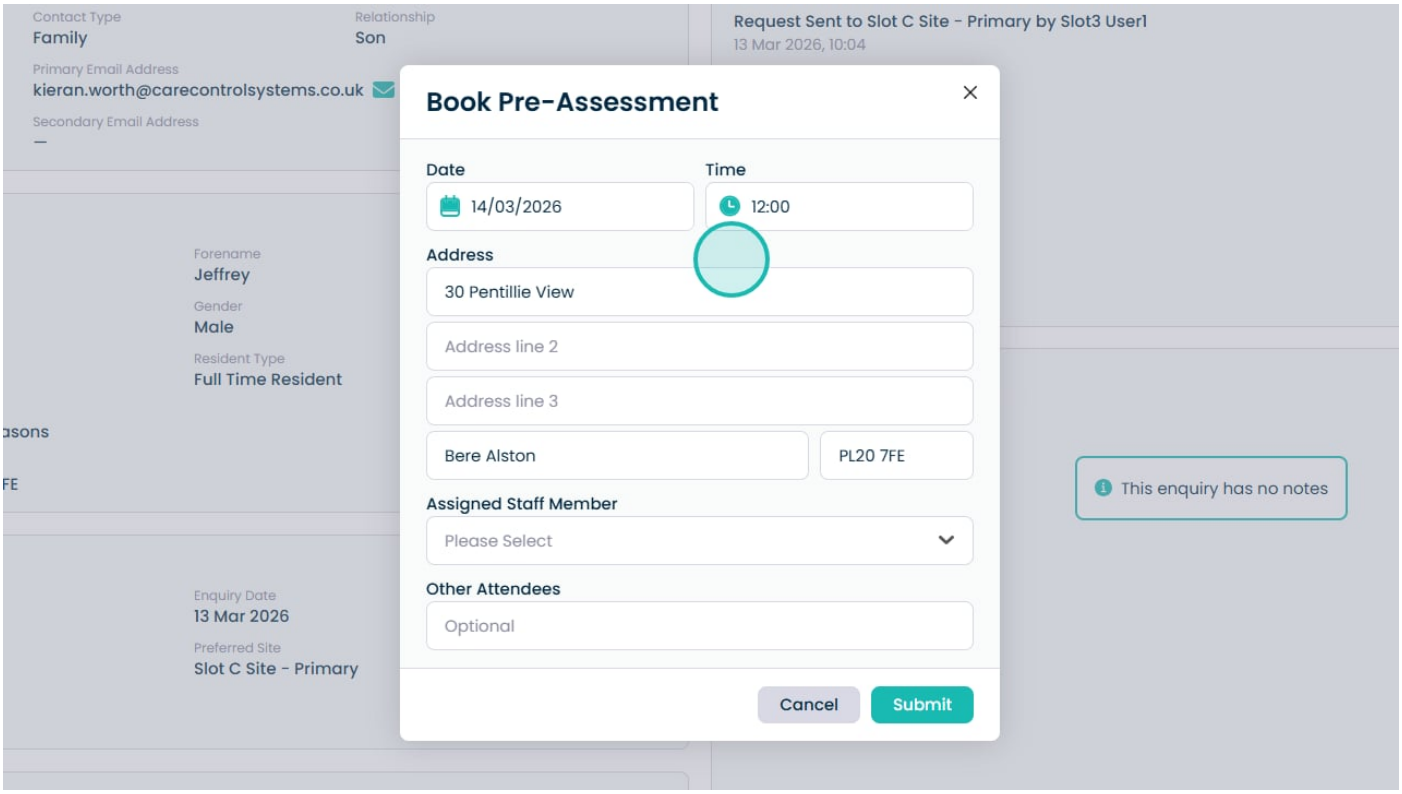
Click the eye icon next to the enquirer



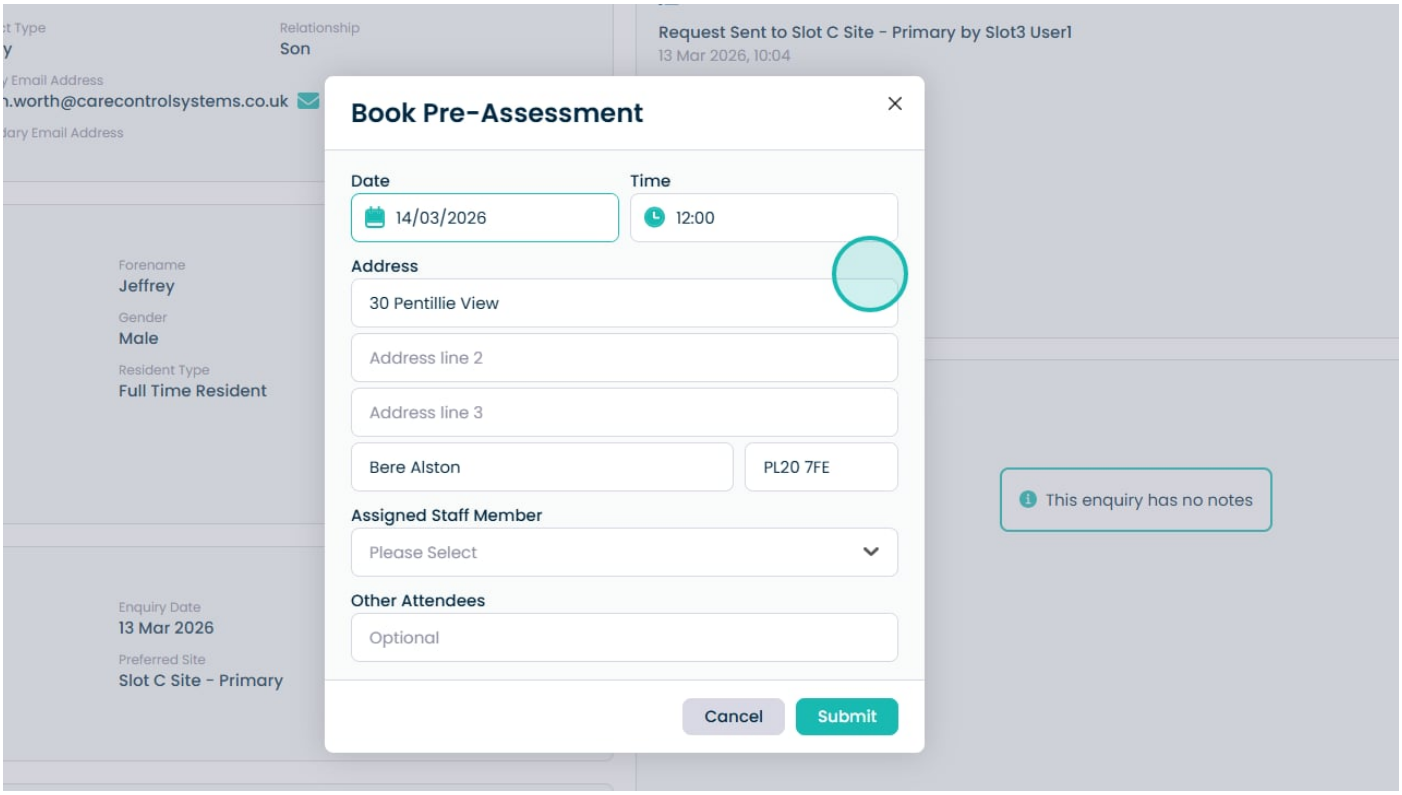
Click Book Pre-Assessment



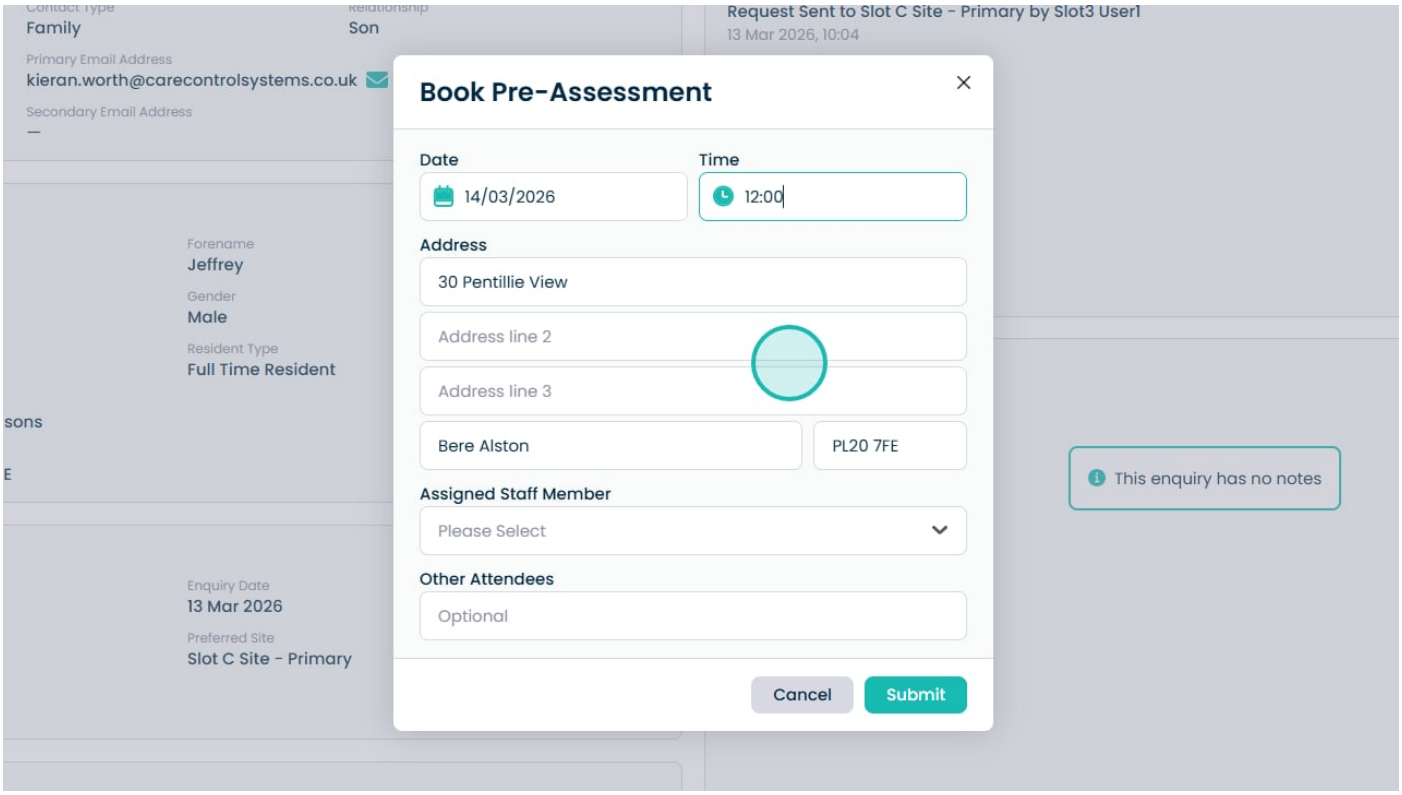
Change the date



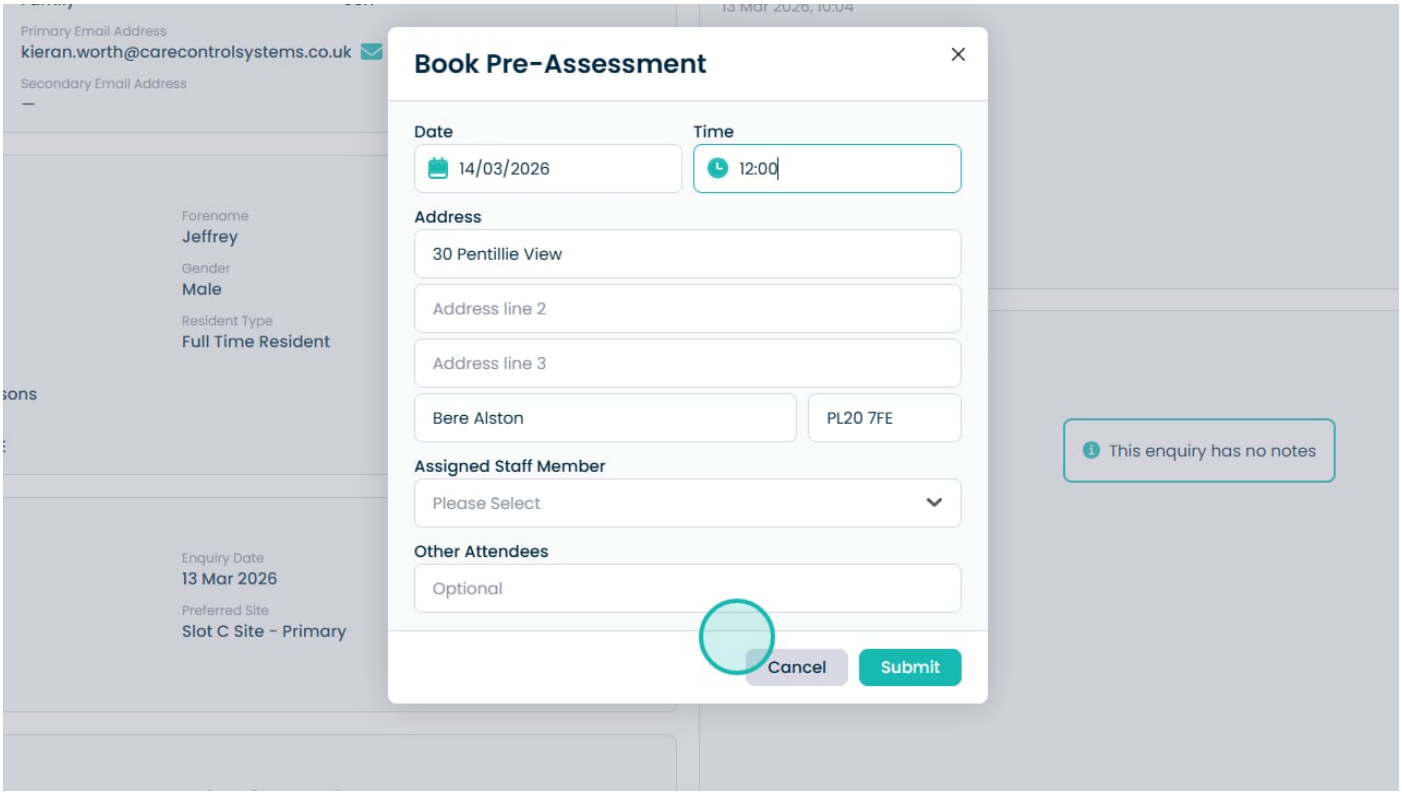
Change the time



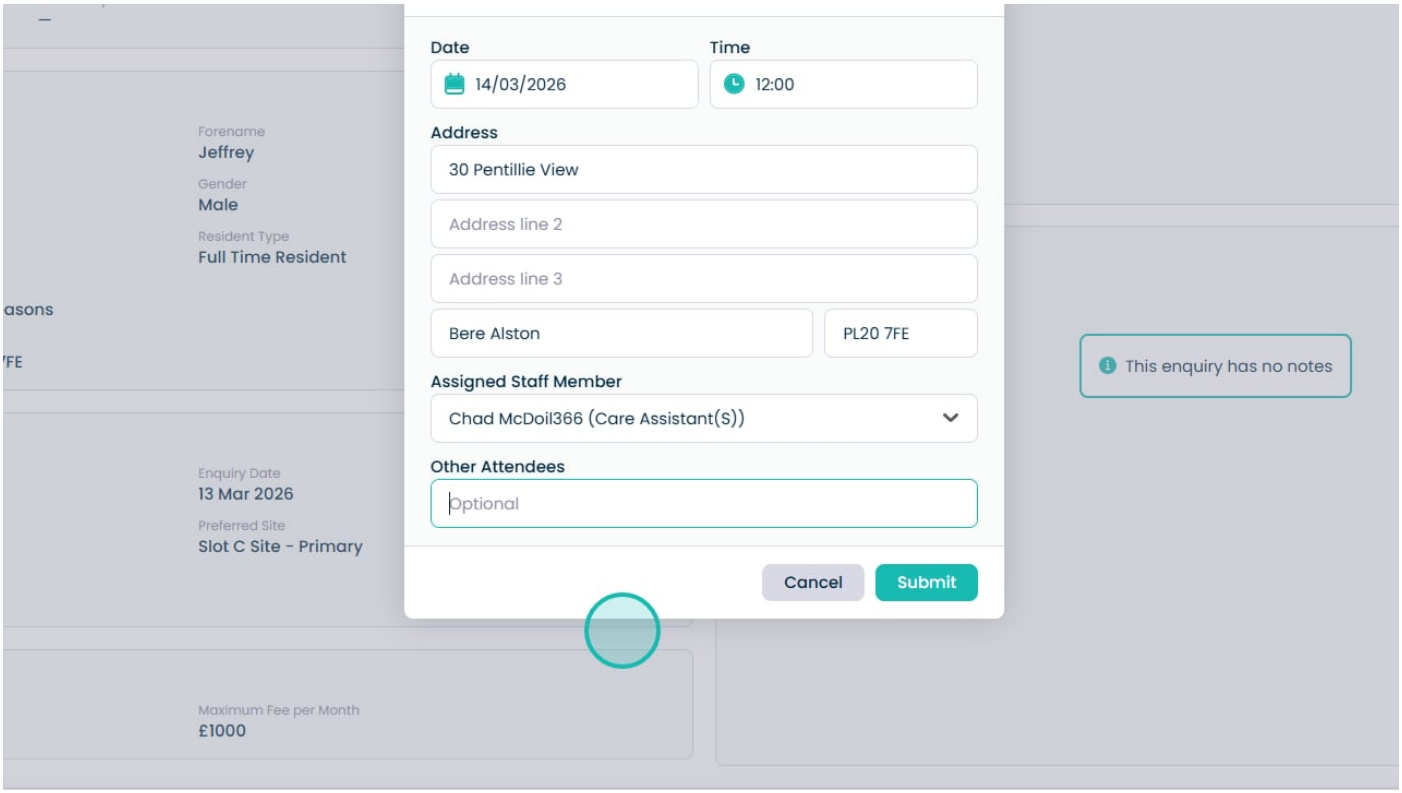
Confirm or amend the address if required



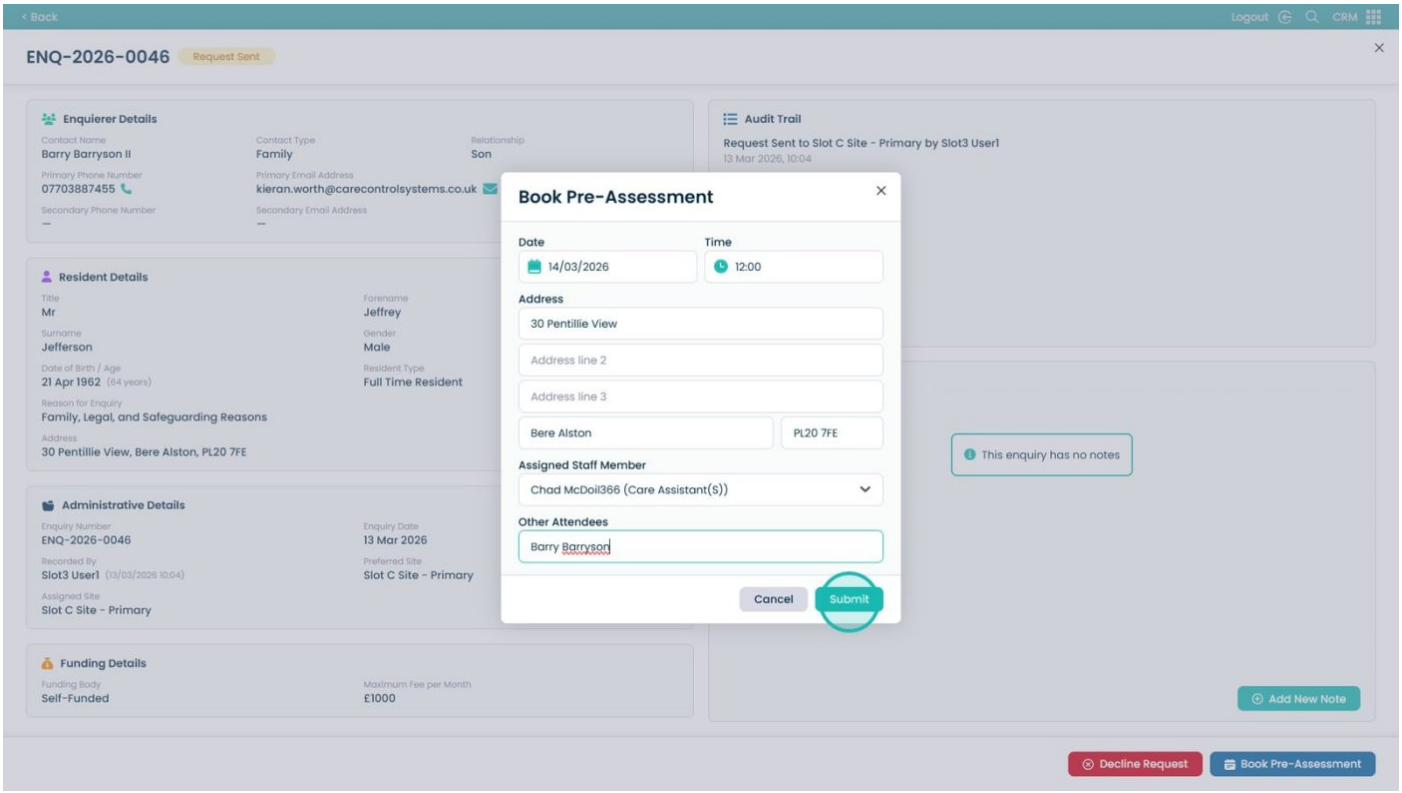
Choose a staff member from the drop-down menu



Enter the names of any additional attendees



Click Submit when finished



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