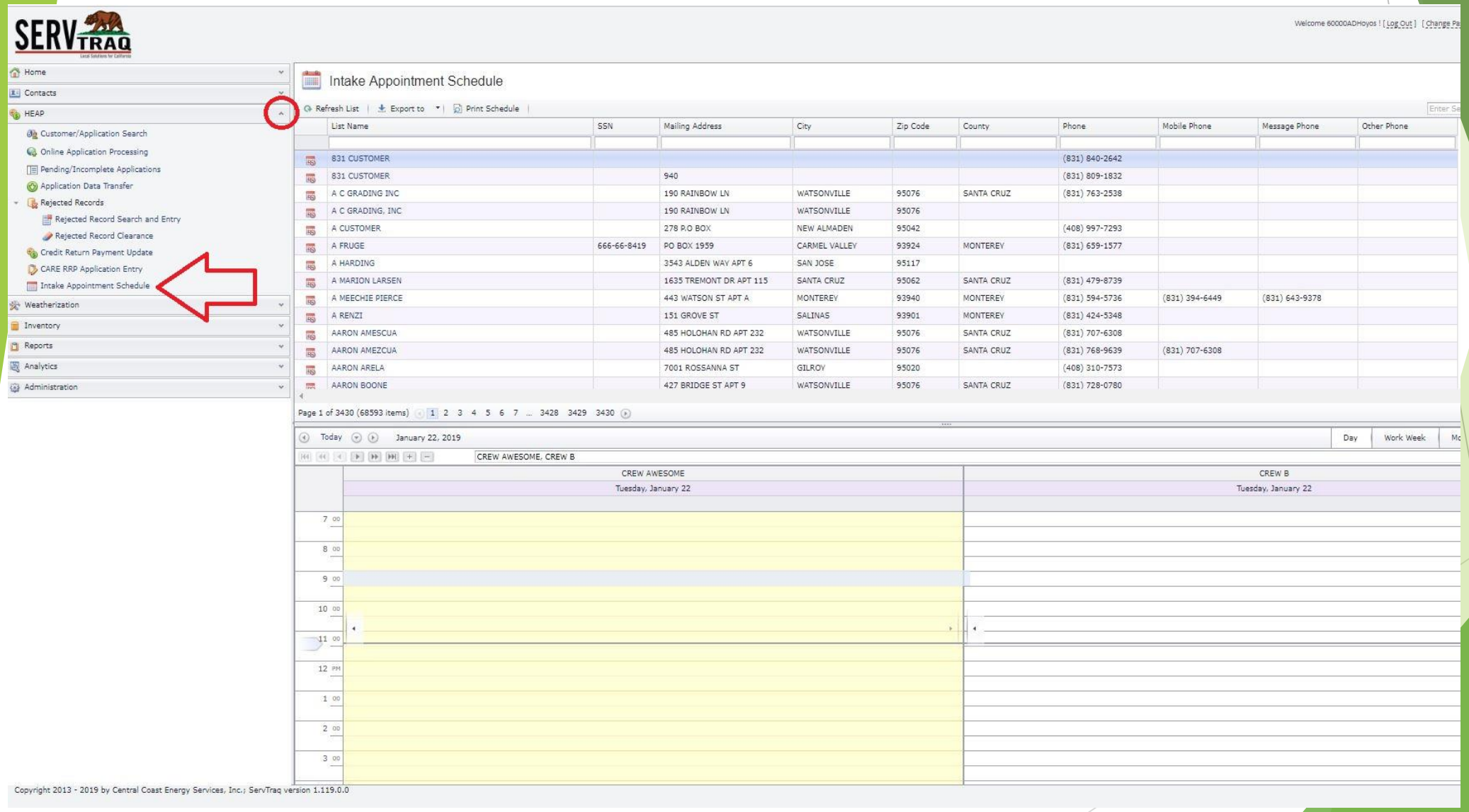
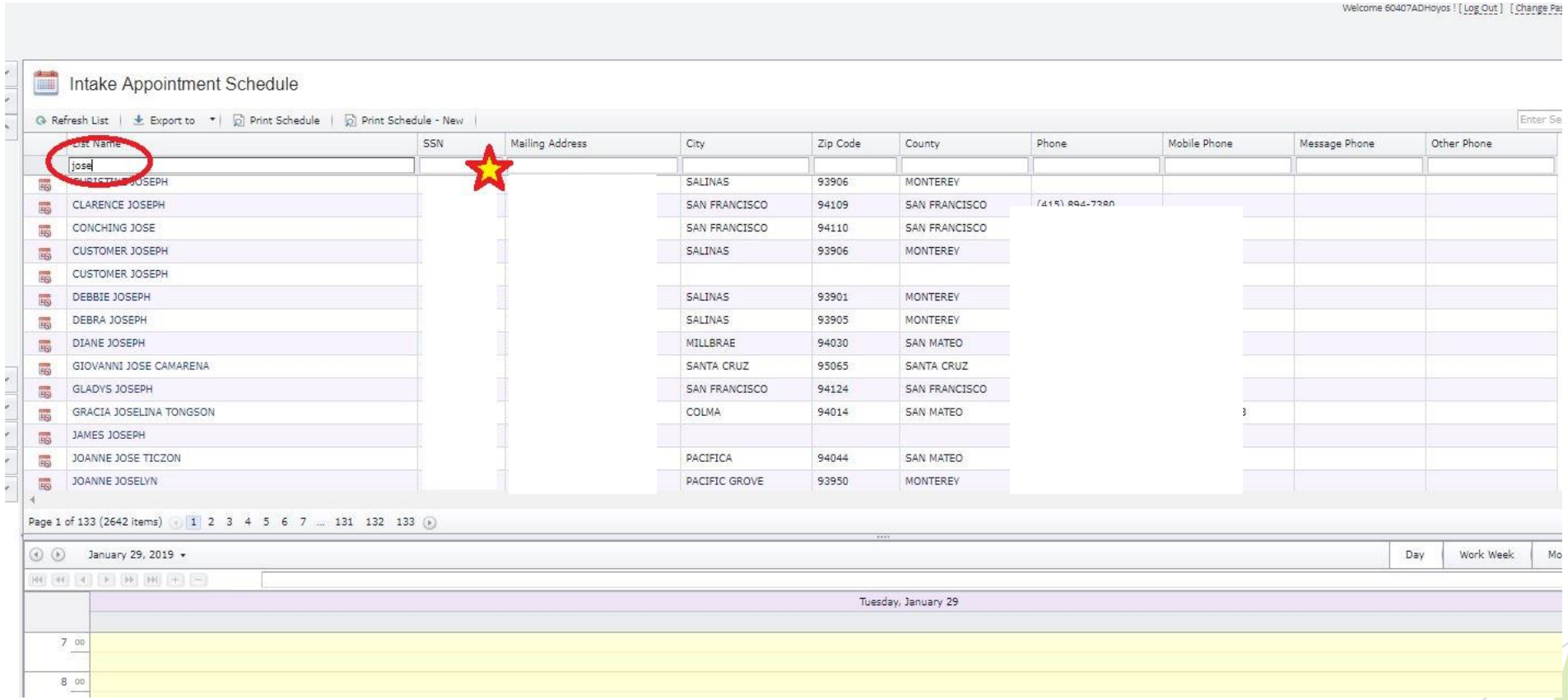
Access the appointment scheduler by clicking on the HEAP drop down menu, then Clicking on Intake appointment schedule

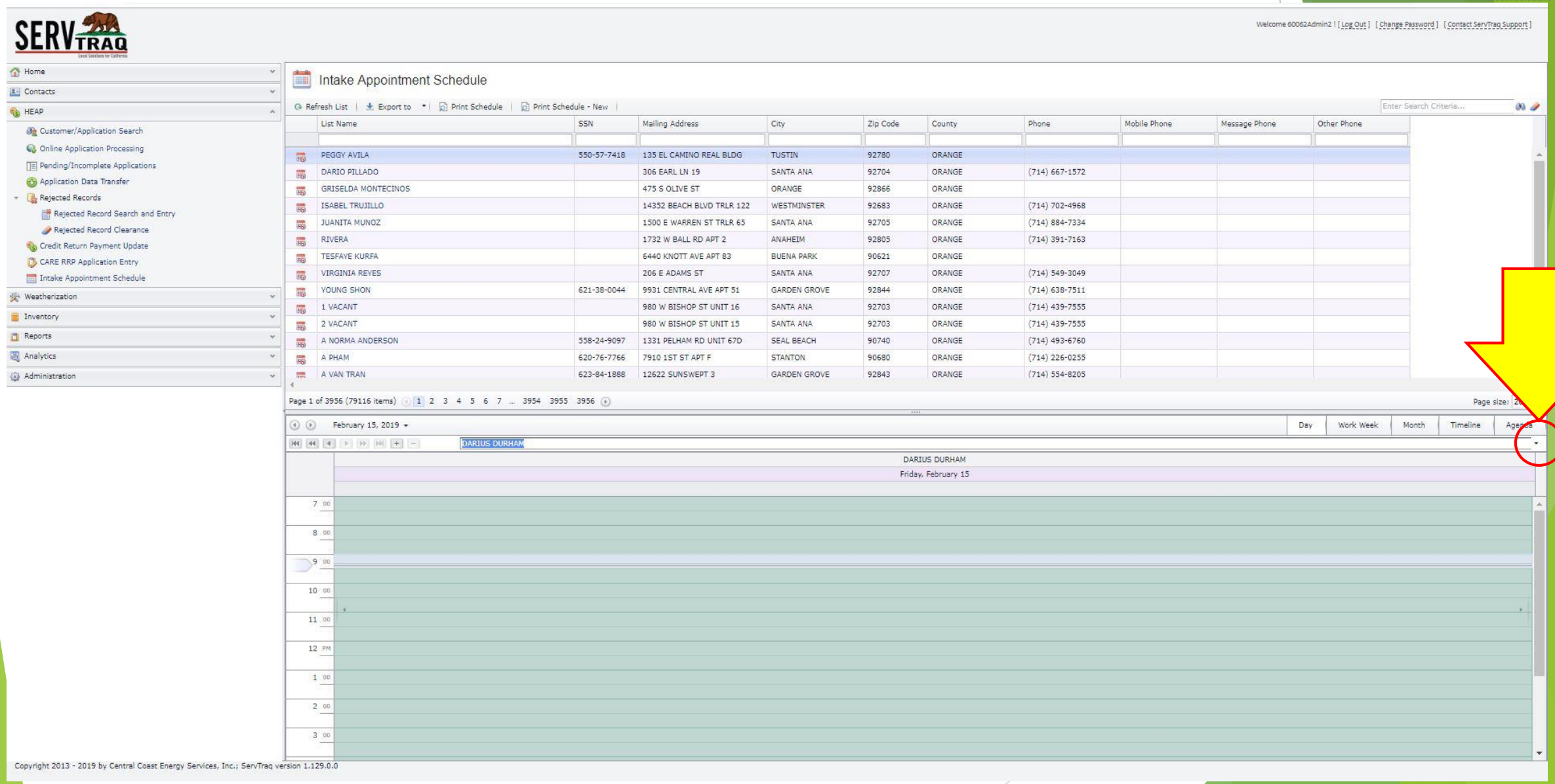


# Use the fields at the top of each column to search for your customers

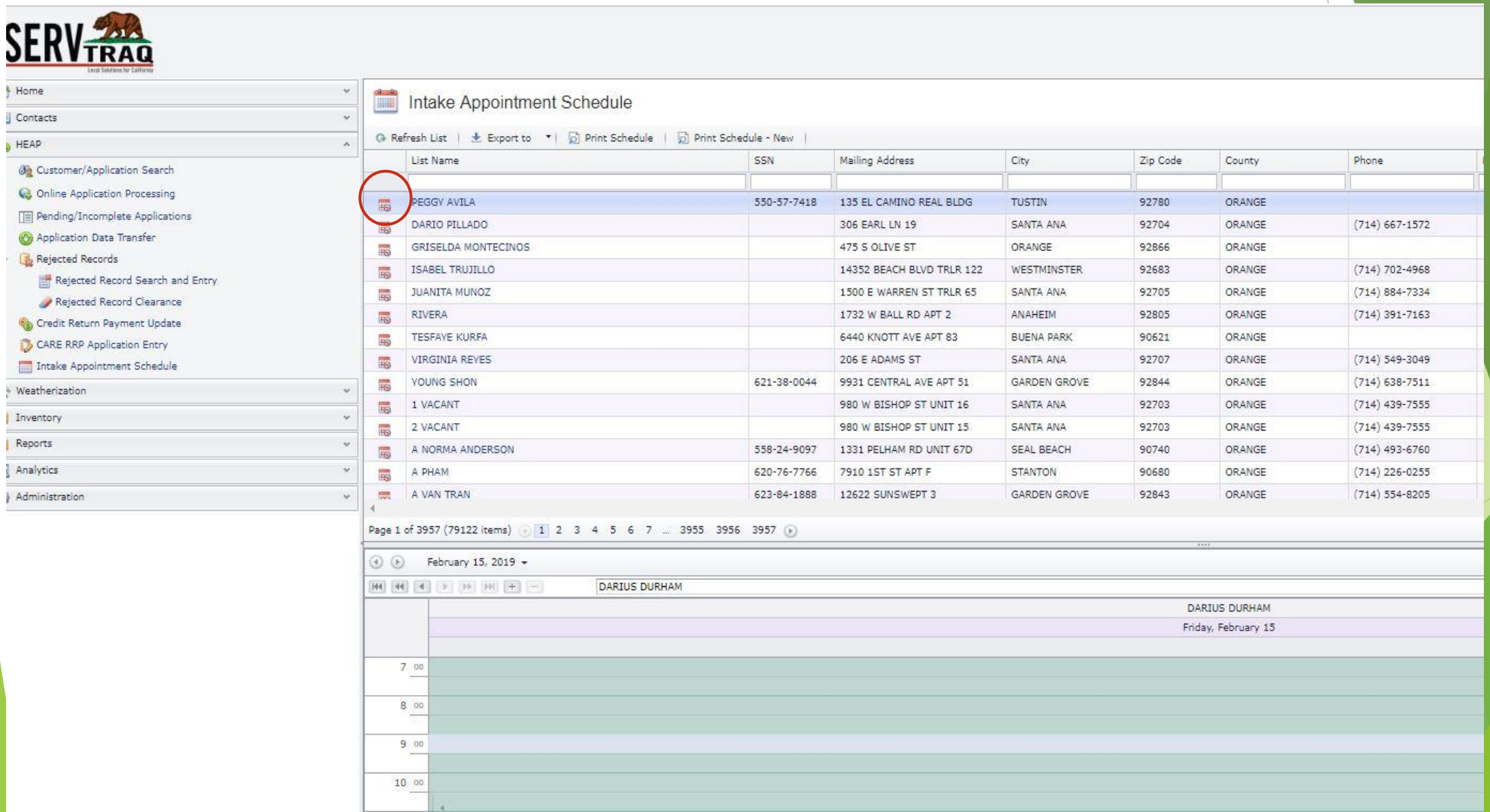



SSN's must be entered "exactly" in order to be found in the system

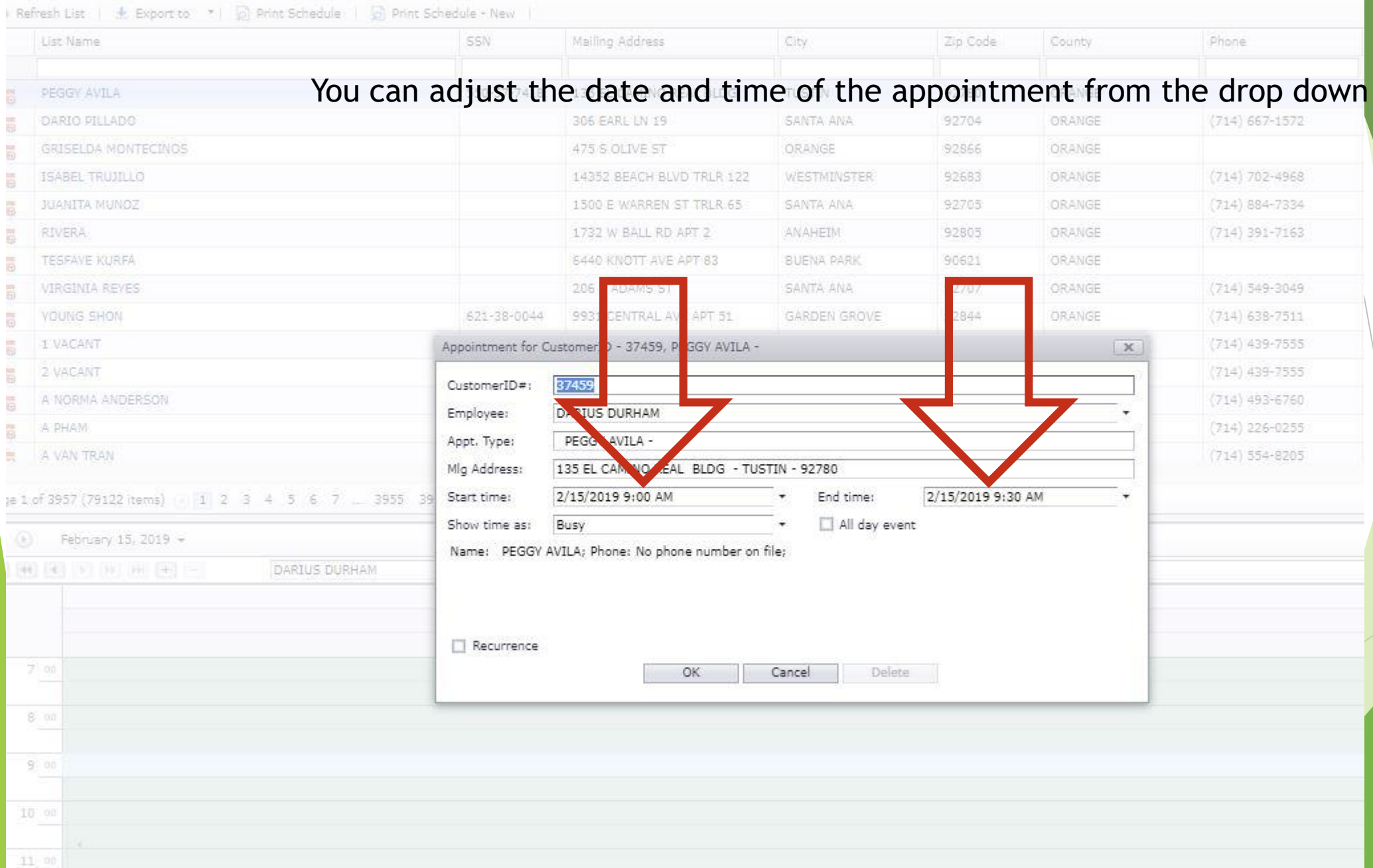
# Click on the drop down menu to find your name for Scheduling



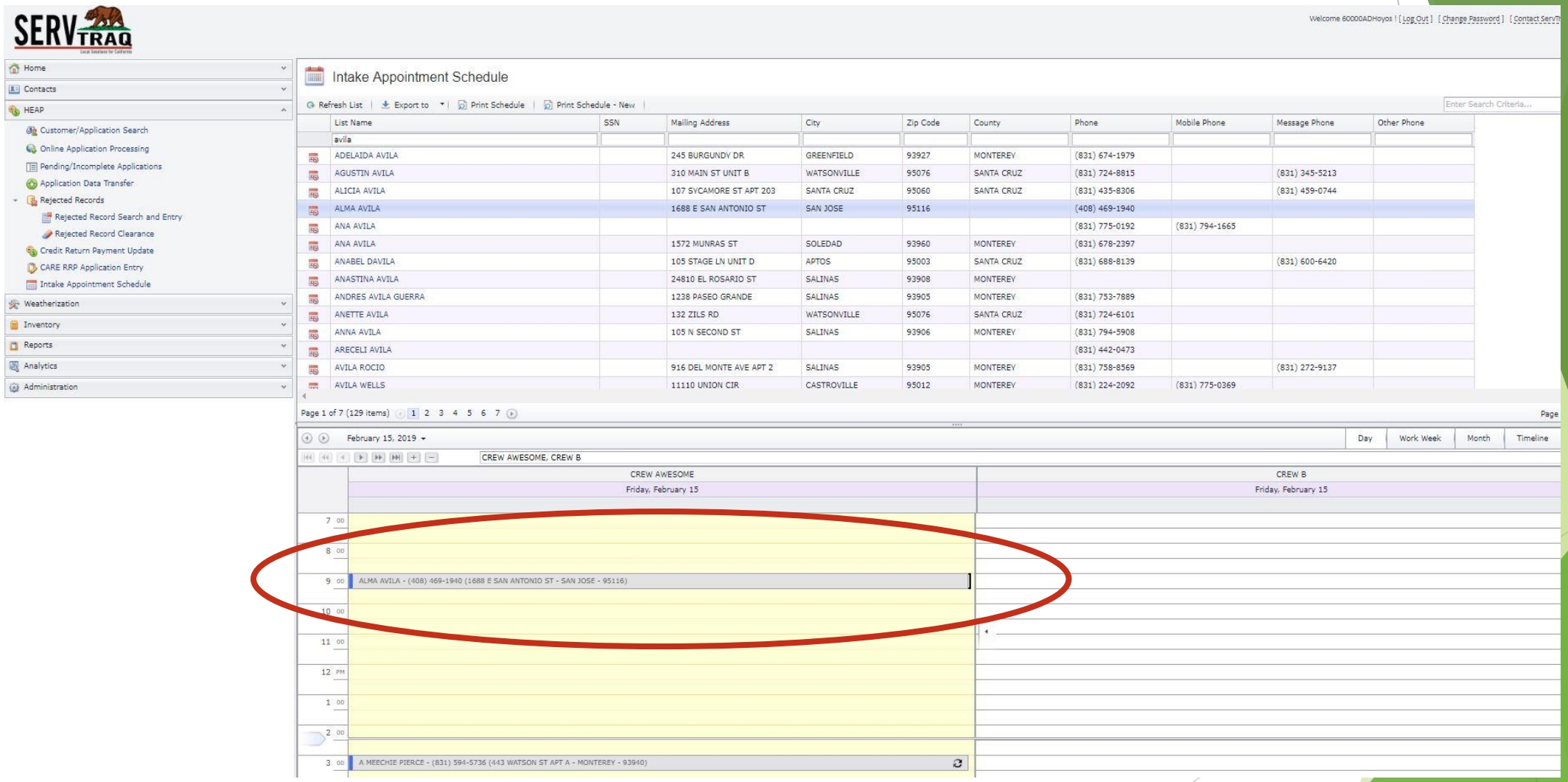
# Click on calendar icon to the left of the customer in question, to open the appointment entry



You can adjust the date and time of the appointment from the drop down boxes



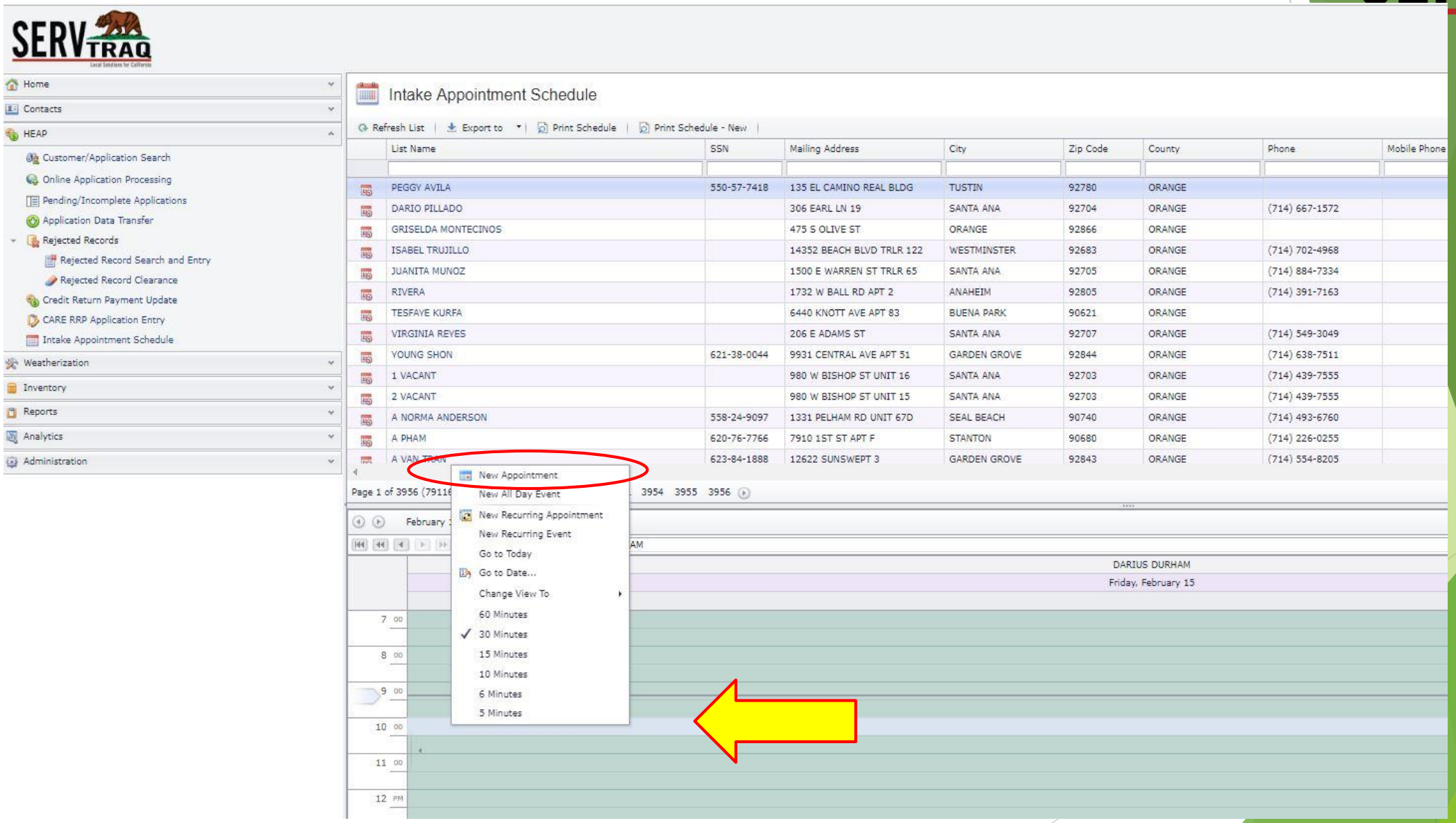
# The appointment will show up in the schedule below



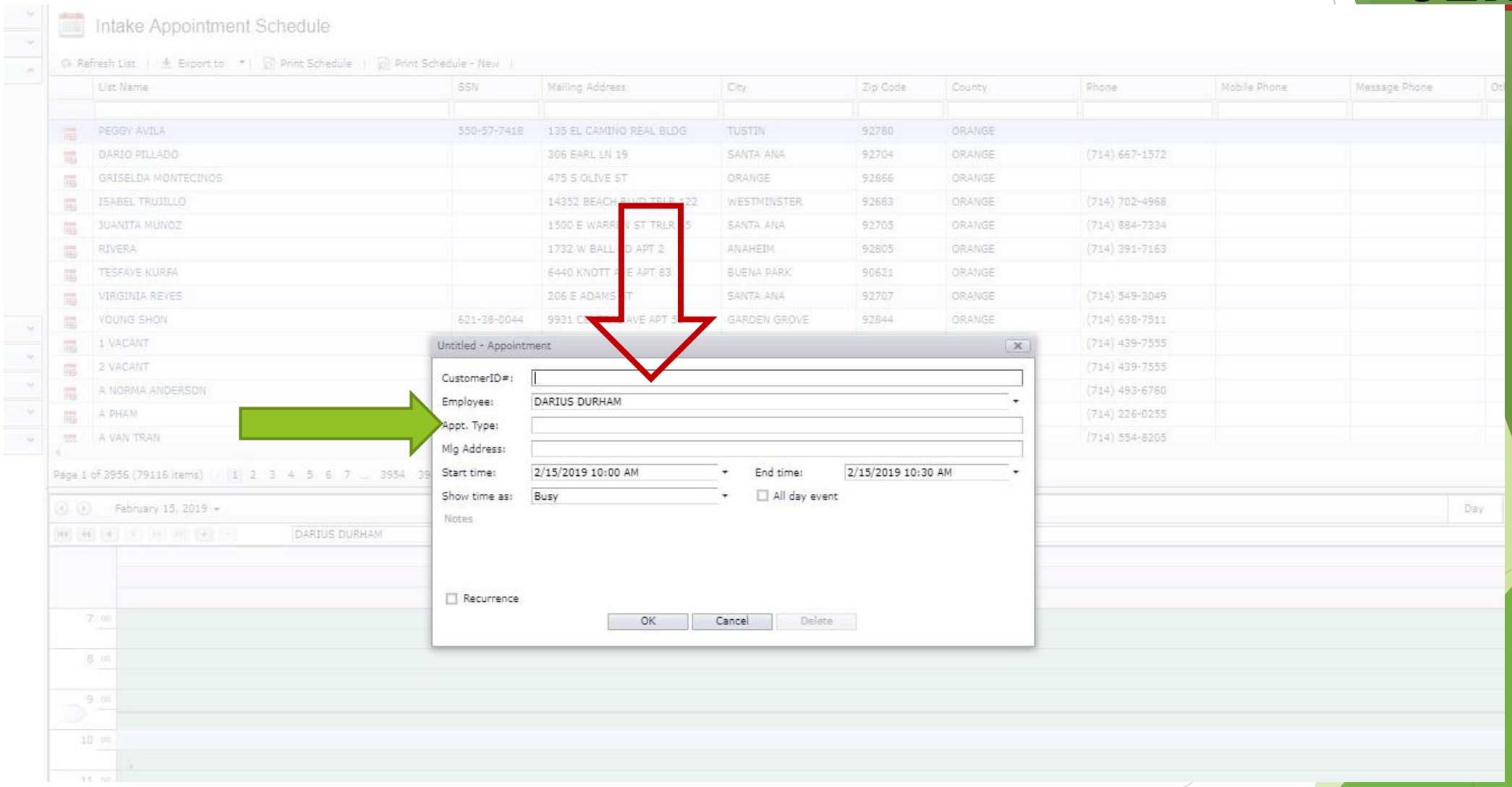
Sheduling for **Outreach appointments** is just as easy. Highlight your name again from the drop Down menu

| | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| GRISELDA MONTECINOS | | 475 S OLIVE ST | ORANGE | 92866 | ORANGE | | | | |
| ISABEL TRUJILLO | | 14352 BEACH BLVD TRLR 122 | WESTMINSTER | 92683 | ORANGE | (714) 702-4968 | | | |
| JUANITA MUNOZ | | 1500 E WARREN ST TRLR 65 | SANTA ANA | 92705 | ORANGE | (714) 884-7334 | | | |
| RIVERA | | 1732 W BALL RD APT 2 | ANAHEIM | 92805 | ORANGE | (714) 391-7163 | | | |
| TESFAYE KURFA | | 6440 KNOTT AVE APT 83 | BUENA PARK | 90621 | ORANGE | | | | |
| VIRGINIA REYES | | 206 E ADAMS ST | SANTA ANA | 92707 | ORANGE | (714) 549-3049 | | | |
| YOUNG SHON | 621-38-0044 | 9931 CENTRAL AVE APT 51 | GARDEN GROVE | 92844 | ORANGE | (714) 638-7511 | | | |
| 1 VACANT | | 980 W BISHOP ST UNIT 16 | SANTA ANA | 92703 | ORANGE | (714) 439-7555 | | | |
| 2 VACANT | | 980 W BISHOP ST UNIT 15 | SANTA ANA | 92703 | ORANGE | (714) 439-7555 | | | |
| A NORMA ANDERSON | 558-24-9097 | 1331 PELHAM RD UNIT 67D | SEAL BEACH | 90740 | ORANGE | (714) 493-6760 | | | |
| A PHAM | 620-76-7766 | 7910 1ST ST APT F | STANTON | 90680 | ORANGE | (714) 226-0255 | | | |
| A VAN TRAN | 623-84-1888 | 12622 SUNSWEPT 3 | GARDEN GROVE | 92843 | ORANGE | (714) 554-8205 | | | |

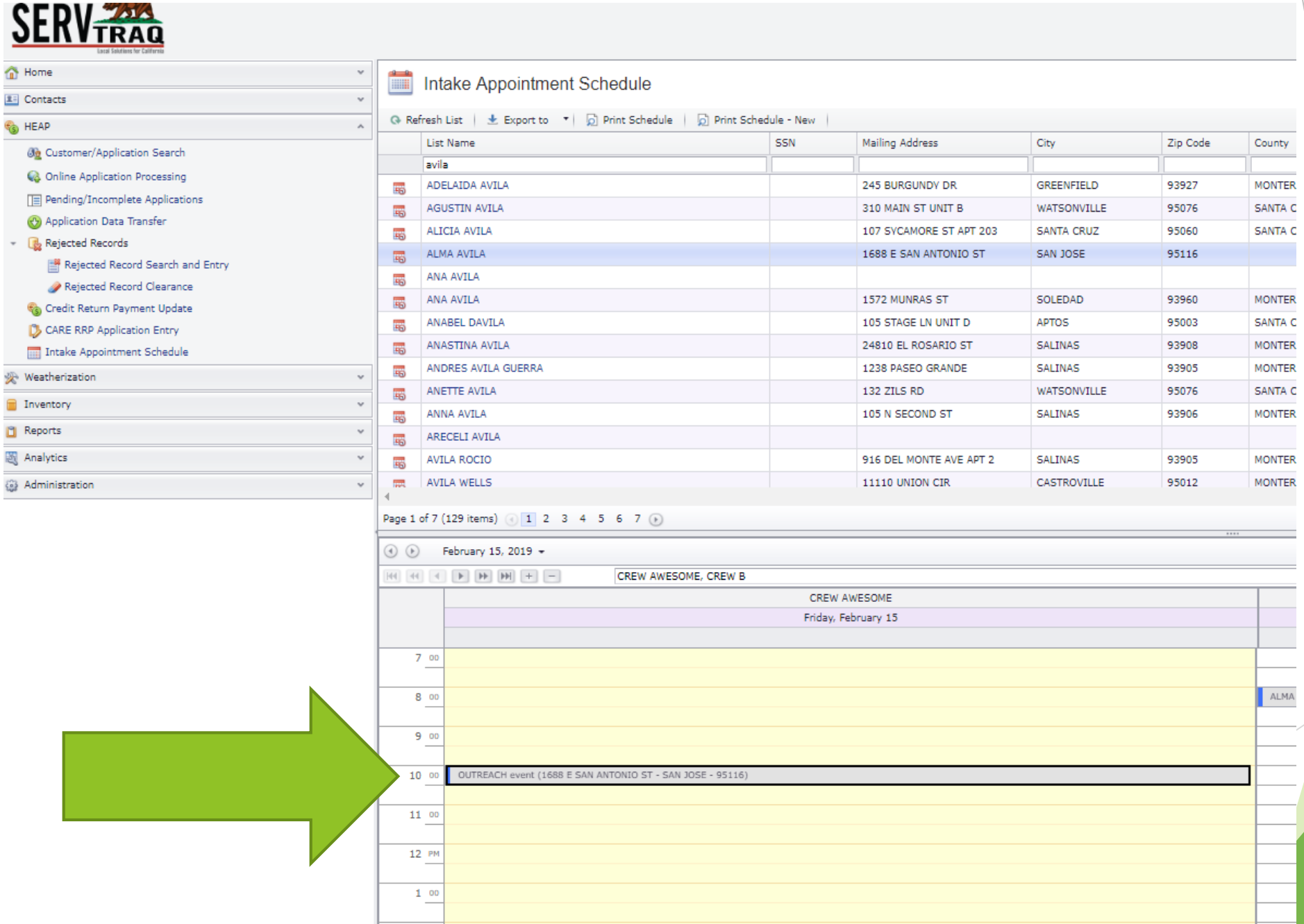
# Right click and select new appointment



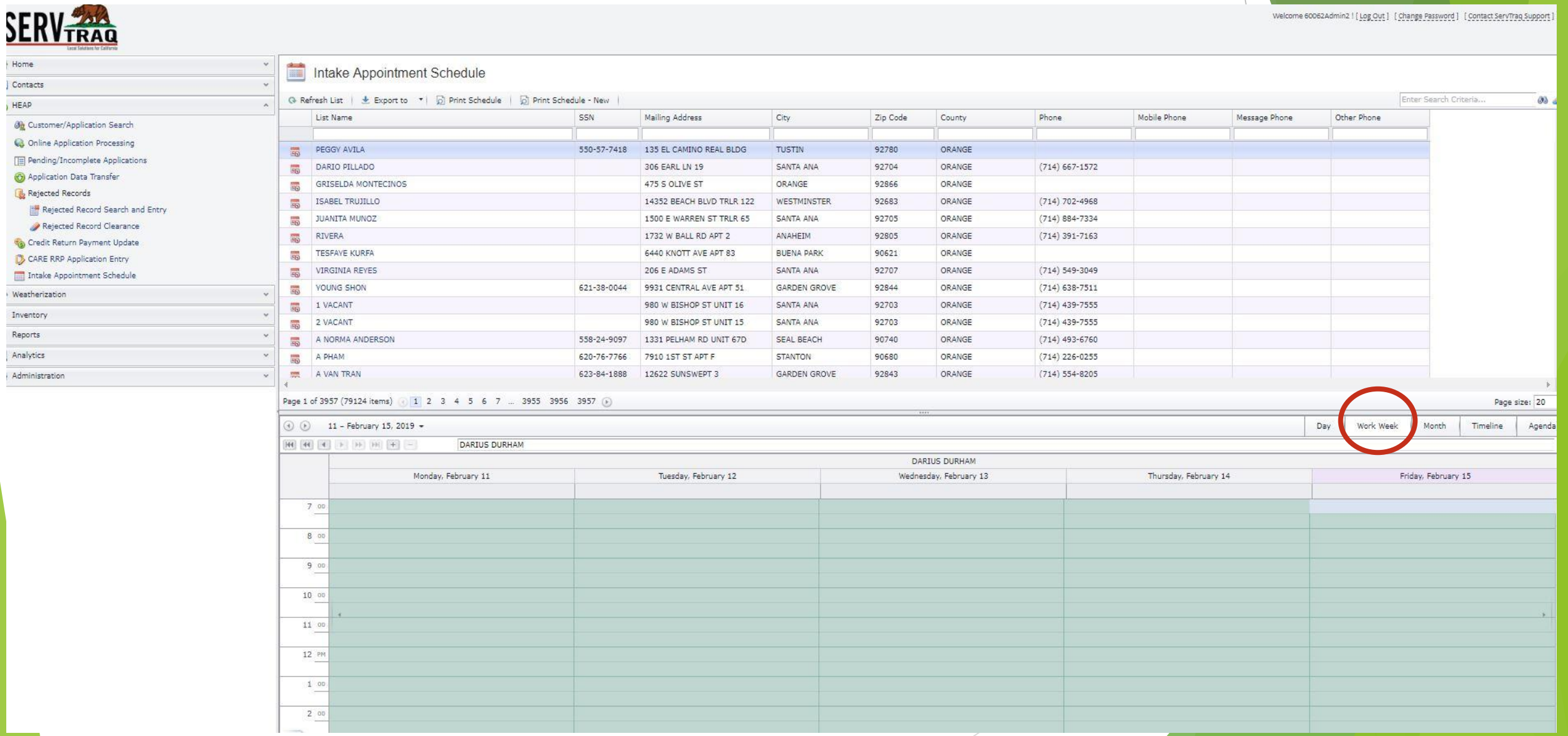
Leave the customer ID blank,
use the appointment type field to type name the Outreach Event



# See the appointment below



# Select a different view for the calendar portion of the scheduler



# ServTraq Support

- Email: Support@ServTraq.com
- Phone: 831-761-1747
- ServTraq Support Chat: https://www.servtraqazure.com/Support.aspx