



Reschedule an appointment in 1 minute

In our busy world where most people are overworked and overbooked, keeping service appointments to service a product that they have purchased can be difficult. Consequently, the administrative staff can spend a lot of time in Microsoft CRM rescheduling service activities for customers. Being able to change service activities in less than a minute means the receptionist, for example, who schedules and reschedules service activities every day, can spend time doing other tasks and customers can be off the phone and on their way. The following scenario takes you through the quick and easy steps to reschedule a service activity.

Rebecca, the receptionist for her organization, answers a call from Mr. Waxman. He has to reschedule his service activity today to tune up his bicycle. He doesn't care when, it just can't be now. In Microsoft CRM, Rebecca can open Mr. Waxman's service activity in the Service Calendar, and then reschedule him for another day and time.

1. In the **Navigation Pane**, click **Service**, and then click **Service Calendar**.
TIP If you don't see Service Calendar on the list, make sure you have the correct permissions, and then, if you have the Microsoft CRM 3.0 client for Microsoft Office Outlook, make sure it is closed. You should open the Microsoft CRM Web client before you open the Microsoft CRM client for Outlook to see Service Calendar listed.
2. To find your customer's service activity (in Rebecca's case, Mr. Waxman), verify that the **Look for** box is empty, and in the **Type** list, select **Appointment and Service Activity**. Then, in the **View** list, select **All Activities**.
3. On the calendar, select your customer's service activity, and then on the **Actions** toolbar, click **Reschedule**.
4. On the **Schedule Service Activity** form, scroll the **Available Times** list to select a new date and time for the customer, click the **Scheduled Start** time, and then click **Schedule**.
TIP Don't click any underlined text, such as Service, Resources, or Site, or the record form will open.
5. On the customer's updated **Service Activity** form, verify the new date and time, and then click **Save and Close**.

Having to take only these few steps to reschedule service activities makes this simple and quick experience for both you and your customers.