

Appointments Setup Upgrade Checklist

This checklist details the actions required to upgrade to **Appointments Setup** for organisations converting from **Vision 3 Appointments**. You should check and complete pre-upgrade actions before the upgrade date.

 **Note** – All existing **Appointments** data is transferred when upgrading.

What do I need to do?

You must complete the following tasks before you can upgrade:

Appointment Setup	Yes/No	Owner/Comments
Training - Complete the eLearning and use this help centre to find out all you need to know about upgrading to and using Appointments Setup - Learning Zone .		
Extending Books – Extend your appointment books by a number of weeks ahead of your upgrade date – Extend Books .		
Appointments backup - We strongly recommend, as a business continuity measure, you check your backup is generating correctly - Appointments Backup - LAN Practices .		
Print Appointments - We strongly recommend, as a business continuity measure, you print your appointments lists for the day following your upgrade - Appointment Lists (File - Print) .		
Reception View - Make a note of which Book Owners display on each of your Views . You need this information to recreate your Views following the upgrade - Reception Views - Choosing and saving views .		