

# Create a schedule

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Create a schedule to help manage what a practitioner or resource's time is used for. The schedule will be assigned an Activity Type, which determines the types of appointments that can be booked in that schedule's time slots.

## Overview

A practitioner's **Schedule** in the Appointment Book is allocated an **Activity Type** with a colour, for example, blue for Consultation. This guides staff what **Appointment Types** they should book in the schedule. Each appointment type has a colour that will sit on top of the Activity Type in the **Appointment Book**.

Example: A practice has a **blue Activity Type - Consultation** used for the **Appointment Types: Long Consultation-30min, Std Consultation-15min and New Patient-30min**. Reception staff looks for the available blue slots to make the appointment.

Mon	Davis, Phillip	Fuller, Igor	Jackson, Gaye
8 AM	0	0	0
	15	15	
	30	30	
	45	45	
9 AM	0	0	0
	15	15	
	30	30	
	45	45	
10 AM	0	0	0
	15	15	
	30	30	
	45	45	

**Activity Type**

**Appointment Type**

## Create a schedule

To create a schedule:

1. Go to Zedmed's **Management** tab.
2. Select **Practice Setup** then **Appointments > Schedules**.

The **Set Schedules for Doctor or Resource** screen will open.

3. Select the **Doctor** or **Resource** you need to create a schedule for.

The **Schedules** section shows all schedules currently set for the doctor. The **Sessions** section shows the sessions that occur each week for the selected schedule.

4. Select **Add**.

This will clear the fields that are used to create a new schedule.

5. In the **Start Date** field, enter a date using the dd/mm/yyyy format and press **Tab**.
6. If this is an ongoing schedule, leave the **End Date** blank. If there is an **End Date**, enter one.
7. Select a cycle from the **Cycle(Days)** drop-down - this is how long the schedule runs before repeating.
8. Select the **Branch**
9. Select **Graphic Display**.

**Set Schedules for Doctor or Resource**

Doctor Davis, Phillip Resource

**Schedules**

Start Date	End Date	Cycle (Days)	Branch
<span style="border: 1px solid red; padding: 2px;">1/01/2017</span>	1/01/2024	7	Branch 1
30/08/2022	30/08/2022	1	Branch 1
1/01/2017	1/01/2024	7	Branch 1
1/08/2016	1/07/2022	7	
1/08/2016	23/10/2022	7	Branch 3
1/08/2016	1/12/2022	7	Branch 4

Buttons: Save, Add, Copy, Delete

Graphic Display

Show all schedules ▼

Clear...

**Sessions**

Day #	Day Of Week	Start Time	End Time	Slot Length	Activity Type	Available Online
1	Monday	08:00	17:00	30 Min	Consultation	<span style="border: 1px solid red; padding: 2px;">▼</span> <input checked="" type="checkbox"/>
1	Monday	08:00	17:00	30	Consultation	Yes
2	Tuesday	09:30	17:00	30	Consultation	Yes
3	Wednesday	08:00	17:00	30	Consultation	Yes
4	Thursday	08:00	17:00	30	Consultation	Yes
5	Friday	08:00	17:00	30	Consultation	Yes
6	Saturday	08:00	12:00	30	Consultation	Yes

Buttons: Save, Messages, Add, Delete, Duplicate

Close Cancel

This will open the **Doctor Schedule** screen (below).

10. The **Display slot size** field at the top right is to display the time increments only on this screen and has no impact on the slot size of the schedule that you are creating.
11. Double-click the time slot where the schedule will start.

The **Daily Schedule** will open.

12. Set the **Start Time** and **End Time** and **Slot Length**.
13. Select an **Activity Type**.

To learn more, see the [Create an Activity Type](#) article.

14. Repeat this process to add more schedules as required.
15. Select **Close** to save and exit
16. Select **Check for Conflicts**

If there are any conflicts, you will need to change one of the conflicting schedules so that they do not overlap.

See the **Resolve Schedule conflicts** section below to learn more.

17. **Close** to save and exit the **Set Schedules** screen.
18. **Configure Online Appointments**

If the practice is using Zedmed **Online Appointments**, you will now select each session in each schedule and tick **Available Online** as required. Follow the steps in the **Set up Online Appointments** guide to complete these steps.

## Resolving Schedule conflicts

If a practitioner or resource has a schedule conflict, it must be resolved before the schedule set can be saved. Conflicts often occur when changes are made and those conflicts will be displayed on the right pane with a red border. Requires Zedmed v38.

To resolve a conflict:

1. Review the conflict description/s and identify the conflicts. A description of each conflict will be provided with the data and times. Select each branch and review the session times for the day of the conflict.
2. Remove or modify one or more conflicting sessions so there is no overlap.
3. Select **Check for Conflicts**.
4. If there are still conflicts repeat the steps above.
5. If there are no conflicts, select **Close** to save the schedule set.

**Important:** No changes to the schedules or sessions will be saved until you select **Close**.

Set Schedules for Doctor or Resource

Doctor
Davis, Phillip
Resource

Schedules

Start Date	End Date	Cycle (Days)	Branch
1/01/2017		7	Branch 1
1/01/2017		7	Branch 1
1/08/2016		7	Apostro'sand
1/08/2016		7	Branch 3
1/08/2016		7	Branch 4

Save
Add
Copy
Delete
Graphic Display
Show all schedules
Clear...

Sessions

Day #	Day Of Week	Start Time	End Time	Slot Length	Activity Type	Available Online
2	Tuesday	09:30	12:00	15 Min	Consultation	<input type="checkbox"/>
1	Monday	08:00	12:00	15	Consultation	
2	Tuesday	09:30	12:00	15	Consultation	
2	Tuesday	13:00	16:00	15	Consultation	
3	Wednesday	08:00	12:00	15	Consultation	
4	Thursday	08:00	12:00	15	Consultation	
5	Friday	08:00	12:00	15	Consultation	

Save
Messages
Add
Delete
Duplicate
Check For Conflicts

Please resolve the following conflicts to save and close the schedule.

A session from Monday 14:00 to 16:00 for a Schedule with Start Date 1/08/2016 for Doctor Phillip Davis conflicts with a session from Monday 13:00 to 15:00 for a Schedule with Start Date 1/01/2017

A session from Tuesday 14:00 to 16:00 for a Schedule with Start Date 1/08/2016 for Doctor Phillip Davis conflicts with a session from Tuesday 13:00 to 16:00 for a Schedule with Start Date 1/01/2017

This practitioner works at 4 branches and has overlaps between 2 branches on Monday and Tuesday. A conflicting session will need to be modified or removed for each overlap.

Close
Cancel