

# Scheduler



The information provided in this user guide is provisional and subject to change.

Copyright © 2014 AMC Convergent IT This work is copyright and may not be reproduced except in accordance with the provisions of the Copyright Act Published: Monday, 28 September 2015

# Contents

Managing appointments	3
Processing appointments	5
Schedule screen	7
Appointment screen	10
Customer details screen	19
Finding an appointment	23
Creating a new appointment	25
Finding a customer	27
Creating a new customer	30
Viewing a customer's details	33
Editing a customer's details	35
Adding notes to an appointment	37
Adding a service to an appointment	39
Changing a service	
Editing the start time of a service	45
Editing the staff member for a service	47
Recording a staff request	49
Editing the price of a service	52
Editing the duration of a service	54
Editing the break time of a service	56
Removing a service from an appointment	58
Duplicating an appointment	60
Rescheduling an appointment	63
Cancelling an appointment	66
Marking a customer as arrived	68
Marking an appointment as completed	70
Recording customer feedback	72
Turning a customer away	74
Glossary	77
Index	79

The Scheduler maintains a schedule of services either booked in advance or arranged for walk-in customers. You can book, edit, move, duplicate and cancel appointments, and send them to the Point of Sale for payment once completed. For a walk-through of how appointments work, see *Processing appointments* on page 5.

**Note:** The Scheduler services, customers and staff members are maintained separately from the Point of Sale and Portal product, customer and user information. Customers in the Portal database do not automatically appear in the Scheduler, and must be added manually.

#### **Key concepts**

Appointment	Duration	Service
Assistant	Feedback	Time-slot
Book	Section	Turn-away

Break

Also see:

- *Schedule screen* on page 7.
- *Appointment screen* on page 10.
- *Customer details screen* on page 19.

#### What you can do:

- *Creating a new appointment* on page 25.
- *Finding an appointment* on page 23.
- *Turning a customer away* on page 74.
- *Creating a new customer* on page 30.
- *Finding a customer* on page 27.
- *Viewing a customer's details* on page 33.
- *Editing a customer's details* on page 35.
- *Duplicating an appointment* on page 60.
- *Rescheduling an appointment* on page 63.
- *Cancelling an appointment* on page 66.
- *Marking a customer as arrived* on page 68.
- *Marking an appointment as completed* on page 70.
- *Recording customer feedback* on page 72.
- *Adding a service to an appointment* on page 39.
- *Editing the start time of a service* on page 45.
- *Changing a service* on page 43.
- *Editing the staff member for a service* on page 47.
- *Recording a staff request* on page 49.
- *Editing the price of a service* on page 52.
- *Editing the duration of a service* on page 54.
- *Editing the break time of a service* on page 56.
- *Removing a service from an appointment* on page 58.
- *Adding notes to an appointment* on page 37.

# **Processing appointments**

When a customer requests an appointment:

1. Find a suitable time on for their appointment and create a new appointment.

See Creating a new appointment on page 25.

2. If the customer has a standard appointment they would like to repeat, find and duplicate that appointment.

See *Finding an appointment* on page 23.

Also see *Duplicating an appointment* on page 60.

3. Search for the customer or create a new customer if necessary.

See *Finding a customer* on page 27.

Also see *Creating a new customer* on page 30

4. Add any notes or requests to the appointment.

See Adding notes to an appointment on page 37.

5. Add the requested services to the appointment.

See Adding a service to an appointment on page 39.

6. Make any required changes to individual services or remove any unnecessary services.

See:

- *Changing a service* on page 43.
- *Editing the start time of a service* on page 45.
- *Editing the staff member for a service* on page 47.
- *Editing the price of a service* on page 52.
- *Editing the duration of a service* on page 54.
- *Editing the break time of a service* on page 56
- *Removing a service from an appointment* on page 58
- 7. If the customer requested a specific staff member for a service, record the staff request.

See *Recording a staff request* on page 49.

8. When the customer arrives for the appointment, record their arrival in the appointment.

See Marking a customer as arrived on page 68.

9. When all services of the appointment have been completed, mark the appointment as completed.

See Marking an appointment as completed on page 70.

10. Record the customer's feedback, if required.

See *Recording customer feedback* on page 72.

11. If the customer wants to schedule a repeat of the same appointment, duplicate the appointment to a new date.

See *Duplicating an appointment* on page 60.

The appointment is available in the Point of Sale for payment.

# Schedule screen

Use the Schedule screen to:

- View the available time-slots of your staff members.
- View past and upcoming appointments.

See Finding an appointment on page 23.

- View no-shows and completed appointments.
- Create appointments.

See Creating a new appointment on page 25.

• Turn away customers.

See Turning a customer away on page 74.

#### **Opening the Schedule screen**

To open the Schedule screen:

1. Load the Schedule application in your web browser.

The Schedule screen is displayed.

	Date						Арроіт	uments				
2 We 3 Th	Feb Mar	2012 2013 2014		Chris	Lauren	esin		Alchele	2 pat	Giern	Luita	•
4 Fr	May	2015	8:00a				_	Niranda 🤟 Kerr				
Yesterda	v	,	10.04	Varie Freitas	Anter Owens	Genna Baldry	Arthu 🔗	1	Justke Roper	]	Nigel Nonates	
Today		· · · · · · · · · · · · · · · · · · ·	0.408	Ross Britter	Lauren 💙 Guatteri	j				Brad White 🥩		,
Friday	~~~	,	-			Justine Roper	Genna Baltry		Alleon Ridge	]		
Saturday	y	,	10:30a									
Sunday		>	-	fbrad White 😽	]							
Monday		>	11.15a					Lauren 💙 Gueten				
Tuesday		>	11:30a			Genna Baktry			]			
Next We	dnesda	iy >	11.454			Constant of						
	Turn an		12:00p									
- C.A.			12.15p									

# Schedule screen key fields and buttons

Field	Description
1         Ko         Feb         2012           2         We         Mar         2013           3         Th         Apr         2014           4         Fr         May         2015           5         So         Jun         2016	Select a day to view the appointments for.
Yesterday >	Select to display the appointments for a day in the coming week, or the previous day.
Today >	I see and any
Tomorrow >	
Friday >	
Saturday >	
Sunday >	
Monday >	
Tuesday >	
Next Wednesday >	
★ Turn away	Press to turn away a customer.
	See <i>Turning a customer away</i> on page 74.

		Field	Description	
Chri	ls Laur	en eoin	Jacqui	The staff members who can provide services.
•				Press to scroll to the next page of staff members.
9:00a 9:15a	Maria Freitas	Amber Owens	Genna Baldry	The scheduled services and free time-slots for each staff member on the selected day.
9:30a				·
9:45a	Ross Britton	Lauren 🥩 Guatteri		
10:00a				
10:15a		(	Justine Roper	

# **Appointment screen**

Use the Appointment screen to manage individual appointments:

• Create customers.

See Creating a new customer on page 30.

• Create appointments.

See Creating a new appointment on page 25.

Add services to appointments.

See Adding a service to an appointment on page 39.

Edit service details such as price, duration, break time or staff member.
 See:

• *Editing the duration of a service* on page 54.

- *Editing the break time of a service* on page 56.
- *Editing the start time of a service* on page 45.
- *Editing the staff member for a service* on page 47.
- *Editing the price of a service* on page 52.
- Reschedule appointments.

See *Rescheduling an appointment* on page 63.

Duplicate appointments.

See *Duplicating an appointment* on page 60.

Mark customers as arrived.

See Marking a customer as arrived on page 68.

- Mark appointments as completed.
   See *Marking an appointment as completed* on page 70.
- Record customer feedback.

See *Recording customer feedback* on page 72.

# **Opening the Appointment screen**

To open the Appointment screen:

- 1. Press either:
  - an existing appointment you want to edit
  - an empty calendar slot where you want to create an appointment.
- 2. The Appointment screen is displayed.

Dustomer:	j – J	Show customer details			Total \$0.0
9:15a - 9:30a: (Please selec	t a service)		Price: 50 00	Add	service
look SALON . Section	Calour			9:004	
ervice			-	9.150	(Please select a 👩
Colour Demi Colour Demi Colo	ur Demi Colour Demi Colour	Tint Long Tint Medium	TintMenz	9:30a	ecin
Tomection Long Medium	Short X Long			9.454	
🔶 🔶 🚽					
Tint Tint Short Regrowth				58:004	
				10:10a	
ecistant ime: 915a •	Duration: 15 min		Break: None	10:30a	

For a list of things you can do with this screen, see *Managing appointments* on page 3.

# Appointment screen key fields and buttons

#### **Customer area**

Glose		Арр	ointmer	nt: 3 April	2014				i Serie
Customer.			Show cust	ener details				То	tal: \$0.00
9:15a - 9:30a: (Pleas	e select a service)				Price:	(so oo	Ad	d service	
Service:	Section: Colour Colour Demi Colour Medium	Demi Colour X Long	TetLong	Tint Medium	Tirt Mens		0:004 0:154 0:306 0:458 0:006	(Please select a service)	eoin
Assistant Time: 9.15s • Roschedule Feedh		ation: 15 mins				None	10 15a		Completed

Use the Customer area to view and edit the customer the appointment is booked for, the price of the full appointment and any notes added on the appointment.

Field	Description
Customer	Name of the customer the appointment is scheduled for.
	<b>Note:</b> You can leave this field blank for a walk-in customer.
Show customer details	Press to display the Customer detail screen. See <i>Editing a customer's details</i> on page 35.
Details	Any notes or request from the customer regarding the appointment.

Field	Description
Total	The combined price of all services in the appointment.

#### Service area

Customer Details					Show custo	ener details				Total	\$0.00
9:15a - 9	:30a: (Ple	ase select a	a service)				Price: (s	0.00	Add	service	
Book S/	LON .	Section:	Colour	•					9:004		
Service:						-			9-15a	(Please select a service)	eom
Colour	Demi Colour Long	Demi Colour Medium	Demi Colour Short	Demi Colour X Long	TintLong	Tint Medium	Tint Menz		9:30a	<u> </u>	600
		and do in a	Short						9454		
Tent Regrowth	Tint Short								10:00a		
									10.15a		
ime: 9.1	anal		Dura	tion: 15 mins	-		Break: N		10.30#		

Use the Service area to select the service to be booked, the staff member to perform the service, and edit the service's price, duration or break time.

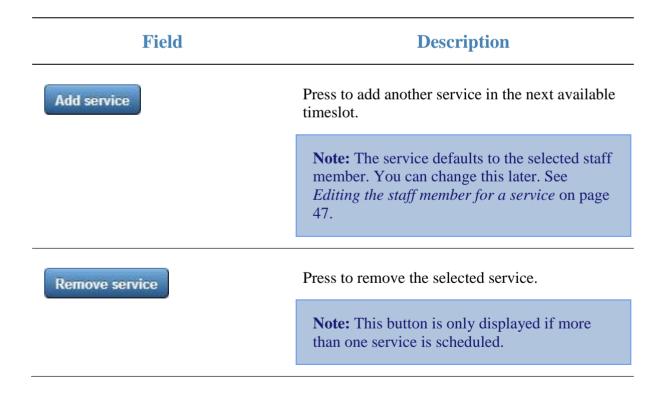
Field	Description
Time	The time the selected service is scheduled. Press another slot in the Schedule area to select another time.
Service	The name of the selected service.
Price	Press to change the price of the selected service. See <i>Editing the price of a service</i> on page 52
Book	Select the category of service you want to add.
Section	Select the subcategory of service you want to add.

Field	Description
Service	Press a service icon to book that service for the currently selected time slot.
	See Adding a service to an appointment on page 39.
	<b>Note:</b> A service icon may be disabled if the selected staff member has another appointment that would overlap that service's duration.
Assistant	Press an assistant icon to book that staff member for the service.
	See Editing the staff member for a service on page 47.
	<b>Note:</b> Assistant icons may be disabled if that staff member already has an appointment that would overlap the current service's duration.
Requested	Press to mark the currently selected staff member as requested by the customer. See <i>Recording a staff request</i> on page 49.
	See Recording a stag request on page 49.
Time	Select the time the service starts.
	<b>Note:</b> The start time relates to the service currently selected in the Schedule area, not the entire appointment.
Duration	Select the length of time the staff member is required for the service.
Break	Select the length of time the customer is required to wait after this service, during which no staff member is required. For example, a customer of a hair salon waiting for hair dye to set.

#### Schedule area

Customer Details					Show custo	mer details			Total: \$0.
9:15a - 9	9:30a: (Ple	ase select a	a service)				Price: 50 00	Ada	t service
look: S	ALON .	Section:	Colour	•				9:00a	
Service:	-	-	-	-	-	-	-	9.154	(Please select a g
Colour	Demi Colour	Demi Colour Medium	Demi Colour Short	Demi Colour	TintLong	Tint Medium	Tint Menz	9:30a	
	Long	Medium	Short	XLong				9454	
Tint Regrowth	TintShort							10:00a	
								10.15a	
ime: 9.1				tion: 15 mins	-		Break None	• 10.30a	

Use the Schedule area to arrange the schedules of the different services within one appointment.



	Field			Description
9:00a				uled services. The times on the left e availability of staff during each
<del>9:15a</del>			Colour	Description
9:30a	(Please select a service)	2	Green	The selected staff member is available at this time.
9:45a		Glenn	Yellow	The selected staff member is unavailable at this time, but other staff members are available.
			Red	No staff members are available at this time.

#### Menu area

Customer Details					Show custo	ener details			Total	\$0.00
9:15a - 9	:30a: (Ple	ase select a	service)				Price: (50.00	Ade	Liservice:	
Book S/	LON .	Section:	Colour	•				9:00x		
Service:								9:15a	(Please select a service)	eoin
Colour	Demi Colour Long	Demi Colour Medum	Demi Colour Short	Demi Colour X Long	TintLong	Tint Medium	Tirt Menz	9:304		6000
								9.454		
Tent Regrowth	Tint Short							10:00#		
								10.15a		
ime: 9.1	-		Dura	tion: 15 mins	8 <b>•</b> 1		Break: None	* 10.30#		

Use the Menu area to reschedule or duplicate appointments, record customer feedback, and record when a customer has arrived and an appointment is completed.

Field	Description
Reschedule	Press to reschedule or duplicate an appointment. See <i>Rescheduling an appointment</i> on page 63. Also see <i>Duplicating an appointment</i> on page 60.
Feedback	Press to record customer feedback about this appointment. See <i>Recording customer feedback</i> on page 72.
Arrived	Press to record that the customer has arrived for their first service. See <i>Marking a customer as arrived</i> on page 68.
Completed	Press to record that the appointment is complete. See <i>Marking an appointment as completed</i> on page 70.

# **Customer details screen**

The Customer details screen records customer information such as:

- The customer's name.
- The customer's phone number and address.
- Notes on the customer, such as refreshment preferences.

#### **Opening the Customer details screen**

To open the Customer details screen:

1. Press an empty time-slot on the Schedule screen.

The Appointment screen is displayed.

2. Press the **Customer** field.



The Customer search screen is displayed.

Customer Uctor Dem Colour Dem Colour Dem Colour Trif Long Trif Medum Trif Mens Concolon Dem Colour Dem Colour Dem Colour Trif Long Trif Medum Trif Mens Trif Trif Short Trif Sho	Close				Ар	poîntmen	it: 3 April 2	2014				
New customer     10:00e       Colour     Dems Colour       Colour     Dems Colour       Dems Colour     Dems Colour       Stant     Stant       Tint     Stant       Tint     Stant       Tint     Stant       Regrowth     Tint Short       Resistant     Requested       11:30a     11:30a	Contraction	100	letters to	start searc	hing		mer details				To	otal: \$0.00
Colour Dem Colour Dem Colour Dem Colour Dem Colour TintLong TintMedum TintMens Tint Tint Short Tint Short Tint Short Regrowth Tint Short Tint Medum TintMedum TintMens Assistant Regrowth Tint Short Tint Short Tint Medum TintMedum TintMedum TintMens TintM	New	customer						Price:	\$0.00	-	service	-
Colour Demi Colour Demi Colour Demi Colour Tirt Long Tint Medum Tirt Mens Correction Long Demi Colour Demi Colour St.Long Tint Tirt Short Regrowth Assistant Regrowth III 100 III 200 IIII 200 IIII 200 III 200 IIII 2		3						-		10:15a		
Assistant. Requested 1:30a				Short	Demi Colour X Long	TireLong	Tint Medium	Tint Mens		10:30a		100000
Assistant. Requested 11.15a	•									10.45a		
Assistant Requested 11.204	Regrowth									1000000		
	Assistant:							Ree	bokeou			
Time: 10:30a • Duration: 15 mins • Break: None •		30# •	-		tion: 15 mins			Break	None •			

3. Type the first few letters of the customer's first or last name.

The search results are displayed.

~	-	_		Appointme	nt: 3	April 2014	_	
istomer: d				Show card	konner (	letails		Total \$0.0
There are 12 mat	ching	customers:						Close
New customer	75 .Jo Vi	Ir David Green 5 iPhone Street binsonville ictoria, 3700 491776223	1 Bla Blahv Victo	ames Dean h Street rite ria, 3123 443322	312	Brent Durant 3 2445445	Ms Debbie Gallin 3000 0412123123	hir
Ms Amy Duyhno 3000 0400000000	ouen	Ms Deaglin Cla 111 road road road viv 3314 55555555	arke	Mr David Sr 123 Smth St Yarravile 3013 0393155555 0400123455	mith	Ms Nic Dank 4051 55544433398	Ms Jane Doe 2222 0147885001	Ms Datney Schill 4444 1234657
Ms Fern Dish 4444 22222255555	3256	lonty Dwier						
e: 10:30a •		Durat	ion: 1	S mins	n .	Brea	Requested 11.3	Da
chedule Fee	elback	l.						Anned Complet

4. Press the customer's name.

nee -		Appointme	nt: 3 April 2014		
ustomer: d		Show rate	tomer details		Total: \$0.0
There are 12 matc	hing customers:				Close
New customer	Mr David Green 75 iPhone Street Jatinsonville Victoria, 3700 0491776223	Mr James Dean 1 Blah Street Blahville Victoria, 3123 0466443322	Mr Brent Durant 3123 0412445445	Ms Debbie Gallirhi 3000 0412123123	
Ms Amy Duyhno 3000 0400000000	Ms Deaglin Cl 111 road road road viv, 3314 60556556	Arke Mr David St 123 Smth St Yarravile 3013 0393155555 0400123456	Ms Nic Dank 4051 55544433398	Ms Jane Doe	Ms Dafney Schill 4444 1234067
Ms Fern Dish 4444 22222255555	Ms Monty Dwier 3256 0398568874			- 0	
sistant:	- m Durat	ion: 15 mins •	Bre	Requested 11.304	
Contraction of the local division of the loc	Durat	ANNU IN MARK	Die	Ren. 110010	Anned

# 5. Press Show customer details

Customer: David Green	stomer details Total \$0.0
10:30a - 10:45a: (Please select a service)	Price: \$0.00 Add service
Book SALON • Section Colour •	10:00
Service:	10:15a
Correction Long Nedium Short X Long	Tint Medium Tint Mens 10 304 (Please select a gat
	10.45a
Tint Tint Short Regrowth	11/80a
	11:15a
ussistant.	Requested 11.30a
ime: 10:30a • Duration: 15 mins •	Break: None .

The Customer details screen is displayed.

Close				Ар	pointmer	ıt: 3 April	2014				120
Customer:	David Green				Hide c	ustomer detaib				Tota	s0.0
Title: Address:	Mr •	First nam	e: David		Last nan	ne: Green	_	50.00	Add	service	
Suburb: Phone:	Johnsonville 0491776223		State: Mobile	Victoria	Postcode	9; (3700			10:00a		
Notes:	Latte 1 suga								10.15a		
Colour	Demi Colour Long	Dens Colour Bedium	Demi Colour Short	Demi Colour X Long	Tird Long	Tint Medium	Tire Mens	8	10:30a	(Please select a service)	2 pst
	•								10.45#		
Tint legrowth	Tint Short								11/80a		
									11.154		
Assistant:	-	-	-			-	Re	equested	11.30a		

# **Customer details screen key fields and buttons**

Field	Description
Title	The customer's preferred title, such as Mr, Ms, etc.
First name	The customer's given name.
Last name	The customer's family name.
Address	The customer's unit or house number and street.
Suburb	The suburb the customer lives in.
State	The state the customer lives in.
Postcode	The postcode the customer lives in.
Phone	The customer's landline phone number.
Mobile	The customer's mobile phone number.
Notes	Any notes kept on the customer. For example, refreshment preferences.

# Finding an appointment

Find an appointment to edit, cancel, reschedule or duplicate it, or to view the customer's details.

Appointments are displayed by the services allocated to staff members at scheduled times.

To find an appointment:

1. Select the date of the appointment, either from the date picker or by using the daysof-the-week selections.

Date					Appoir	uments				
2 We Mar 2013 3 Th Apr 2014		Chris	Lauten	eain	Jacque	Michelle	2	Glenn	Lier	÷
4 Fr May 2015	9:00a 8:15a	Maria Fretas	Anther Owens	Getna Balby	ám. 🥩	Miranda 🤘 Kert	Justine Roper		Fligel Nomates	
Yesterday >	8.30a		and the second s	-	Mittalias			J		
Today >	9.454	Ress Britten	Lauren V Guatteri	í				Bred White 🤟		,
Tomorrow >	10:00a			ľ	Gerna Baldry		Almon Ridge			
Friday > Saturday >	10.15e			Justine Roper						
Sunday >	10.45#	Brad White 🤟	1							
Monday >	11.00a					Lauren y Guittert	1			
Tuesday >	11.15a									
Next Wednesday >	11.504			Genna Baldry						
* Turn away	12:00p									

2. Scroll through the staff members if necessary to find the appointment.

	Date						Appoir	ntments				
a. Th	Mar Apr	2012 2013 2014		2. Chris	Lauten	ecin	Jacque	Alichelie	2 pat	Gienn	Lite	•
4 Fr 5	May	2015	9:00a 8:15a	Maria Fretas.	Anther Owens	Genna Balory	ám. 🥩	Maranda 🤟 Karr	Justine Roper		Nigel Nomates	
Yesterda	y	>	9.30a				Utrains			]		
Today	w	ು	9,454	Rase Britten	Lauren 🤟 Guatteri	ĵ	Gerna Baldy			Bred White 🤟		
Friday		2	-			Justine Roper	Gemaiteday		Altaon Ridge			
Saturday	e	>	-	-								
Sunday		>	**.00+	Brad White 🤟	]			Lauren	9			
Tuesday		,	11:15a					Guattert				
Next We	dnesda	iy >	11.504			Genna Baldry	]					
			12:00p									
	Turn av	/ary	12:15¢									

3. Press the appointment to open it.

	Date						Appoir	ntments				
2 We 3 Th	Mar Apr	2012 2013 2014		2. Chris	Lauten	ecin	Jacqui	Richelle	2 pat	Gienn	Litz	•
4 Fr 5	May	2015	9:00a			(	láma 🥩	Miranda 🤘 Karr	<b></b>		Nigel Nomates	
Yesterda	ay	,		slana Fretas	Anther Owens	Getna Balovy	Vitrosiana Vitrosiana		Justine Roper	]	inger normæs	
Today		ು	0,454	Rase Britten	Lauren 💙 Guatteri	Í				Bred White 🤟		
Tomorro Friday	DW/	,	TODAS				Gerna Baldry		Alson Reps	]		
Saturda	У	,	-			Justine Roper	1					
Sunday		,	10.45#	Brad White 🤟								
Monday		>	11.15a					Lautes y Guatari	1			
Tuesday	N A serie transi	>				Genne Baldry						
Next We	ednesda	iy >	11,454			una utory						
	t Turn av	vary	12:000									

# **Creating a new appointment**

Create an appointment to:

- Schedule services with specific staff at a time in the future for a customer.
- Allocate staff to a walk-in customer for a service.

To create an appointment:

1. Select the date of the appointment by using either the date-picker or the days-of-theweek selections.

Date						Appoir	ntments				
1 Peb 2 We Mar 3 Th Apr	2012 2013 2014		Chris	Lauren	esin	Record	Nichelle	2 pat	Gieron	Luita	•
4 Fr May	2015	8:00# 9:15#	Vala Tretas	Anter Owens	Georg Baldry	Artha 🛷	Meanda 🤟	Justice Roper		Nigel Nonates	
Yesterday	>					Marculas			]	The second second	
Today	>	0.458	Ross Britter	Lauret 🖌	í				Brad White 🥩		
Tomorrow	>					Genna Baltry		Alison Ridge	]		
Friday Saturday	>	10.025			Justine Roper						
Sunday	>	-	Brad White 😽	1							
Monday	>	11:30a					Lauren 💙 Guatari	1			
Tuesday	>										
Next Wednesday	,	15 30a 11 48a			Cenna Bakiry						
		12:00p									
A Turn and	17	12.15p									

2. Press the time-slot in the column of the staff member you want to book.

The Appointment screen is displayed.

Customer:		Show customer details			Totat \$	0.0
9:15a - 9:30a: (Please se	lect a service)		Price: 50 00	Add	service	
Book SALON . Secti	OD: Calour •			9:006		
Service				8154	(Please select a service)	() ecin
Calour Demi Colour Demi ( Correction Long Med		r TintLong TintMedium	TintMenz	930a		
				9.454		
Test Tirt Short Regrowth				50:004		
lecistant			Horrowstool	32:154		
Time: 9.15a •	Duration: 15 mi	es •	Break: None .	10.30a		

See Appointment screen on page 10.

- 3. If you want to record the customer, either:
  - 1. Find the customer.

See Finding a customer on page 27.

2. Create the customer if they don't already exist in your records.

See Creating a new customer on page 30.

4. Add any notes about the appointment.

See Adding notes to an appointment on page 37.

5. Add the required service to the appointment.

See Adding a service to an appointment on page 39.

6. If necessary, change the staff, price, time or duration of a service.

See:

- *Editing the staff member for a service* on page 47.
- *Editing the price of a service* on page 52.
- *Editing the duration of a service* on page 54.
- *Editing the start time of a service* on page 45.

Save

7. Press

The appointment is created.

# **Finding a customer**

Find a customer to:

- Book an appointment for a specific customer in advance.
   See *Creating a new appointment* on page 25.
- View the customer's details.
   See *Viewing a customer's details* on page 33
- Edit the customer's details.

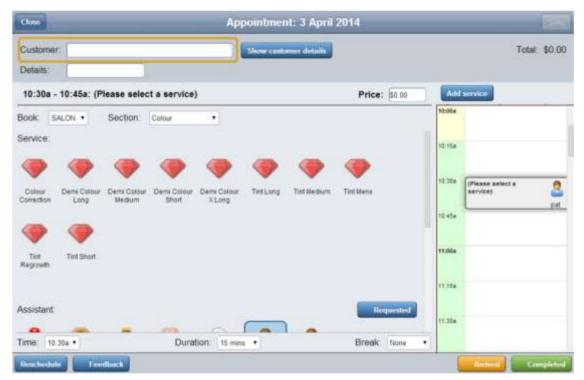
Editing a customer's details on page 35.

To find a customer:

1. Press an empty time-slot on the Schedule screen.

The Appointment screen is displayed.

2. Press the **Customer** field.



The Customer search screen is displayed.

Close	ppointment: 3 April 2014	
Customer:   Please type a few letters to start searching	Show customer details	Total: \$0.00
New customer	Price: 6	i0 00 Add service
		10:15e
Colour Demi Colour Demi Colour Demi Colour Demi Colour Short XLong	ar Tint Long Tint Medium Tint Mens	12.20s (Please select a gal
		10-ete
Tint Tint Short Regrowth		11.00a
Assistant.	Roqu	
Time: 10.30» • Duration: 15 m	uns • Break: r	Vone •
Reschedule		Antend Completed

3. Type the first few letters of the customer's first or last name.

The search results are displayed.

here are 12 matchi	ing costoners.					Close
New customer	Mr David Green 75 Phone Street Johnsonville Victoria. 3700 0491776223	Mr Jan 1 Blah 3 Blahvile Victoria 046644	Street 0 3123	<b>Ar Brent Durant</b> 123 1412445445	Ms Debbie Gallin 3000 0412123123	hir
Ms Amy Duyhnoue 3000 0400000000	Ms Deaglin Cl 111 road road road viv, 3314 66566555		Mr David Smith 123 Smith St Yarraville 3013 0393155555 0400123456	h Ms Nic Dank	Ms Jane Doe 2222 0147885001	Ms Dafney Schill 4444 1234567
4444 3	As Monty Dwier 256 398568874				.01	
22222255555 0	398568874				Requested	-

4. Press the customer's name.

Ref.	_	Appointme	nt: 3 April 201	14	
istomer: d		Show cus	consur details		Total \$0.0
There are 12 match	ing customers:				Christ
New customer	Mr David Green 75 iPhone Street Johnsonville Victoria. 3700 0491776223	Mr James Dean 1 Biah Street Biahville Victoria, 3123 0466443322	Mr Brent Dura 3123 0412445445	Ms Debbie Gallin 3000 0412123123	thir
Ms Amy Duyhnou 3000 0400000000			mith 4051 50544433	2222	Ms Dafney Schill 4444 1234567
4444 1	Ms Monty Dwier 1256 0398568874				
e: 10.30# •	Durab	00: 15 mins •		Requested fit	55e
schedule Feedb	and the second sec	and a rank 11		analysis ( range 2.1	Annest

# Creating a new customer

Create a new customer to schedule an appointment for them.

To create a new customer:

- 1. Press an empty time-slot on the Schedule screen.
- 2. The Appointment screen is displayed.
- 3. Press the **Customer** field.



The Customer search screen is displayed.

Close				Ар	pointmer	it: 3 April 1	2014				
Customer	and the second sec	letters to	start searci	ning	Show cust	mer details				Total	\$0.00
New	customer	Î			_		Price: 50	00	Add	seivico	-
	-	(	(10)	(10)					10.15e		
Colour Correction	Dems Colour Long	Dems Colour Medium	Demi Colour Short	Demi Colour X Long	TestLong	Tint Medium	Tint Mena		10:30a	(Please salect a service)	2
Tint Regrowth	Tint Short								11.00a		
Assistant							Reques	Ind	13.15a		
Time: 10	30a •	-	Durat	ion: 15 min			Break: No		11.30a		
Reschedel	e lee	dback							1	Annual Co	mpletoid

4. Press the **New customer** field.

Close Appointme	nt: 3 April 2014
Customer: Show curs Please type a few letters to start searching Close	meer details Total \$0
New customer	Price: 50.00 Aild service
	10 15 #
Collour Demi Colour Demi Colour Demi Colour Demi Colour Tint Long Correction Long Medium Strott X Long	Tint Medium Tint Ments
🔶 🍝	tükte i
Tint Tint Short Regrowth	11000
Assistant	Requested
Time: 10.30a • Duration: 15 mins •	Break: None •

The Customer details screen is displayed.

Close	_	_	_	Арр	ointmer	ıt: 3 April	2014	_	_	_	11
Customer:					Hide custor	nor details				To	at \$0.00
Title: Address:		First name	K [		Last nan	ne:	_	50.00		service	
Suburb:	-	1	State:		Postcode	E		pc.00	10:15e	Service	
Phone: Notes:			Mobile:	(					10.30e		
Colour D Correction	Dems Colour Long	Dems Colour Medium	Demi Colour Short	Dems Colour X Long	TertLong	Tint Nedum	Tint Mens	,	10.45a	(Please select a service)	ecin
•	•								ttola		
Tint tegrowth	Tint Short								11:15e		
									11.30a		
ssistant:							Re	quested	11.454		
ime: 10.45			Durat	tion: 15 mins		-	Break:	None	•		
Reschedule	-	dback	D'ur ur	and the second	50		Di Guit,	. maria		Antest	Comp

See Customer details screen on page 19.

- 5. Type in the customer's details.
- 6. Press Hide customer details

The details are saved.

7. Continue creating the customer's appointment.

See Creating a new appointment on page 25.

# Viewing a customer's details

For each customer, you can view:

- The customer's name.
- The customer's address.
- The customer's phone number.
- The notes kept on the customer, such as their refreshment preferences.

To view a customer's details:

1. Find the customer.

See Finding a customer on page 27.

-				Ар	oointmen	it: 3 April	2014	_	_	_	12
Custome Details:	r: David Gree	1			Show	ankomer detai				Tot	ai: \$0.0
10:30a	- 10:45a: (P	lease selec	t a service)				Price:	50.00	Add	service	
Book s	ALON .	Section:	Colour	•					10:00w		
Service:									10:15e		
$\bigcirc$			$\bigcirc$	$\bigcirc$			<b></b>		10:30#		
Coleur Correction	Demi Colour Long	Dems Colour Medium	Demi Colour Short	Demi Colour X Long	TintLong	Tint Medium	Tint Mens			(Please select a service)	
_	-								10.45e		
<b>P</b>											
Tint Regrowth	Tint Short								11.00a		
									11.15a		
Assistant							Rec	pensterd			
Assistant							100		11.20#		
5. 					_		Ret	persteri	11.15a		

The Customer details screen is displayed.

Close	_	Ap	pointment: 3 April 2014	_	
Customer:	David Green	1	Hido cistomer details		Total: \$0.0
Title:	Mr • First nam	e: David	Last name: Green		
Address: Suburb:	75 iPhone Street	State: Victoria	Postcode 9700	50.00	Add service
Phone:	0491776223	Mobile:			
Notes:	Latte 1 sugar				10:15e
Colour I Correction	Dems Colour Dems Colour Long Medium	Demi Colour Demi Colour Short X Long	Tint Long Tint Medium Tint Mer		10.30# (Piease select a anvice) all
	<b>~</b>				
Tint Regrowth	Tont Short				11.00a
Tint Regrowth	Turt Short			Requested	13.158
Regrowth	-	Duration: 15 min		Requested	

See Customer details screen on page 19.

### Editing a customer's details

Edit a customer's details to change:

- The customer's name.
- The customer's address.
- The customer's phone number.
- The notes kept on the customer, such as their refreshment preferences.

To edit a customer's details:

1. Find the customer.

See Finding a customer on page 27.

-			_	Ар	oointmen	ıt: 3 April	2014	_	_	_	18
Custome Details:	r: David Gree	۰ ا			Show	undomer detai				To	at \$0.0
10:30a	10:45a: (P	lease selec	t a service)				Price:	50 00	Add	service	
Book s	ALON .	Section:	Colour	•					10:004		
Service:									10:15e		
$\bigcirc$				$\bigcirc$			<b></b>		10.30#		
Colour Correction	Demi Colour Long	Dems Colour Medium	Demi Colour Short	Demi Colour X Long	TintLong	Tint Medium	Tint Mens			(Please select a aervice)	
_	-								10.45e		
<b>P</b>	-										
Tint Regrowth	Tint Short								11:00a		
									11,154		
Assistant							Re	presterd			
						i com			11.30#		
5. 							Re	parated	11.15a 11.30a		

The Customer details screen is displayed.

Close	-	_	Ар	pointment: 3	April 2014		_	_	11263
Customer:	David Green			Hide custome	r details	_		Te	stait \$0.00
Title:	Mr • First nan	ne: David		Last name: 🕞	601				
Address:	75 iPhone Street			-		\$0.00	Add	seivico	
Suburb:	Johnsomille	State:	Victoria	Postcode 9700			10:004	1	
Phone:	0491776223	Mobile	l						
Notes:	Latte 1 sugar						10:15e		
	Contract States				· · ·				
							Ter bar		
	Demi Colour Demi Colou Long Medium	Demi Colour Short	Demi Colour X Long	TestLong Tint M	ledium Tint Mens		10:30#	(Please select a service)	2
				Tint Long Tint N	ledium. Tint Mena		10.45e		201
Correction				Tint Long Tint N	edum Tint Mens				
Correction	Long Medium			Tint Long Tint N	ledium Tint Mens		10.45e		
Correction Tint Regrowth	Long Medium			Tirt Long Tirt N		Requested	10-45e 11.00e		
Correction	Long Medium		Xiong	TertLong Tint N		Requested	10-45e 11.00e		

See Customer details screen on page 19.

- 3. Type any changes into the fields.
- 4. Press Hide customer details

The details are saved.

### Adding notes to an appointment

Add notes to an appointment to record any special customer requests or details relating to the appointment.

To add a note to the appointment:

1. Press the appointment you want to edit in the Schedule screen.

The Appointment screen is displayed.

Close App	pointment: 3 April 2014	Saw
Customer: Genna Baldry	Show contomer details	Total: \$69.00
9:15a - 10:00a: Demi Colour Medium	Price: 545.00	Add service Romova service
Book SALON · Section: Colour · Service: Colour Dem Colour Dem Colour Dem Colour Short Colour Short X Long	Tinf Long Tint Medium Tint Mens	91960 3-158 Derni Cotour Medium 345.00 ectn 8-150 8-456
Tent Tint Shart Regrowth Assistant:	Requested Break: 30 mins	10:60a Ladies Statutiov S24 50 Jacqui 10:15a

2. Press the **Details** field.

Customer: Genna Baldry Show contour	or details		Total: \$69.00
9:15a - 10:00a: Demi Colour Medium	Price: 545.00	Add	service Remove service
Book SALON • Section: Colour •		91964	
		9:15e	Demi Colour Medium
Colour Demi Colour Demi Colour Demi Colour Tint Long Tint L	edum Tint Mens	9:30e	345.00 eçin
Correction Long Usedium Short X Long		9:45a	
🔶 🍝			
Tent Tert Short Regrowth		10:00a	Lades Shoroutow
		10:156	
Assistant:	Requested	10.30a	
Time: 9 15a • Duration: 15 mins •	Break: 30 mins •		

- 3. Type the information you want to record.
- 4. Press Save

The appointment notes are saved.

## Adding a service to an appointment

Add a service to an appointment to schedule a specific staff member to perform a task for the customer at a specified time. Appointments must have at least one service.

To add a service to an appointment:

- 1. Press either:
  - The appointment you want to edit in the Schedule screen.
  - A blank slot in the Schedule screen where you want to create an appointment.

The Appointment screen is displayed.

Customer: Genna Baidry Details:		in a she	er customer detajb			Total: \$69
9:15a - 10:00a: Demi Col	our Medium			Price: \$45.00	Add	service Remove serv
Book SALON . Secti	on: Celour	•			9:00a	
			_	-	975e	Demi Colour Medium
Colour Demi Colour Demi Corection Long		Herrs Caleur TertLong	g Tint Medium	Tint Mens	9:30a	845.00 84
					9.eta	
Tint Tunt Short. Regrowth					10:00a	Ladies Ehgitubitive 824.05 Jac
ssistant	_			Requested	10.50#	
me: 9.15a •	Duratio	0: 15 mins •	100	Break: 30 mins	5	

- 2. Either:
  - 1. Press the time slot in the Schedule area where you want to add a service, if you want to schedule the service for a particular time.
  - 2. Press Add service to add a service in the next available time-slot.

Close	A	ppointment: 3 April 3	2014	Sam
Customer: Gama Baldry Detailts	_	5how customer detail	3	Total \$69.0
9:15a - 10:00a: Demi Colo	our Medium		Price: \$45.00	Add service Bomerve service
look SALON • Section	on: Cotour •			11004
🔶 🍝 🖪	> > >		<b>•</b>	11.254
Cotour DemiCotour DemiC Conection Long Medi		e TetLong TetNedum	Tint Mana	11.254
🔶 🔶				11.45e
Tint Tint Short Regrowth				12,00p
Assistant:			Requested	12 100
ime: 9:15a •	Duration: 15 m	ing •	Break: 30 mins •	12.558

**Note:** You can move the service to another time later. See *Editing the start time of a service* on page 45.

The blank service is added.

Customer: Details:	Genna Bai	dry			Show	unkomer detai	3			fotal: \$69.00
11:30a - 1	11:45a: (P	Nease selec	t a service	)			Price: 50.00	Add	service	emove service
Book SA	LON .	Section:	Colour	•				11:00a		
Service:										
							<b>P</b>	11.154	_	
Colour Correction	Demi Colour Long	Dems Colour Medium	Demi Colour Short	Demi Colour X Long	TintLong	Tint Medium	Tint Mens	17.00e	(Please select a	9
								11.45a	service)	ecin
Tint	Tint Short							11.408		
Regrowth	HUR SHOT							12:00p		
ussistant:							Requested	12:150		
-	-		•	0	1.00	-		. 12.10p		

3. Select the **Book** and **Section** of the service you want.

The available services within that Book and Section are displayed.

Customer Details:	Genna Bak	iy 📄			Show o	unicomer (det)	aite			Total: \$69.00
11:30a -	11:45a: (P	lease select	t a service)				Price:	50.00	Add	service Remove service
Book: Na Service:	8								11.00a	
$\bigcirc$	$\bigcirc$	$\bigcirc$	$\bigcirc$	$\bigcirc$	$\bigcirc$	$\bigcirc$			11.154	L
Acrylic Overlays	Acrylic Rebalance	Actylic Refits	Buff And Polish	French Polish	Full Get Acrylic	Full Set French	Gel Full Set		11.20#	(Please select a
	$\bigcirc$	$\bigcirc$	$\bigcirc$	$\bigcirc$	$\bigcirc$	$\bigcirc$	0		11.45e	
el Overtays	Gel Rebalance	Gel Refills	industrial Piercing	Manicure	Itanicure - Dutuxe	Nail Art	Naji Removal		t2:00p	
$\bigcirc$	$\bigcirc$	$\bigcirc$							12:150	
Polish	Surface	Temporary Nails								
lime: 1t	30a •		Dural	tion: 15 min	6 T		Break:	None	12:30	

**Note:** Services are disabled if their duration would overlap with another service.

4. Press the service you want to add.

				permunent	t: 3 April		_	_	Save
Customer: Genna Bal	dry			Show o	ustomer (det)			1	fotal: \$79.00
11:30a - 11:45a: Fi	rench Polisi	'n				Price: 510.00	Atk	I service R	emove service
Book: Nails •							11.00a		
	$\bigcirc$	$\bigcirc$	$\bigcirc$		0	•	11.12#		
Acrylic Acrylic Overlays Rebalance	Adrylic Refits	But And Polish	French Polish	Full Get Acrytic	Full Set French	Gel Full Sel	11:30a	french Polish	.0
	$\bigcirc$	$\bigcirc$	>	0	$\bigcirc$	<b>I</b>	11.45e	\$10.00	ecin
el Overlays Gel Rebalance	Gel Refils	Industrial Piercing	Manicure -	Manicure - Duture	Nail Art	tiail Removal	t2:00p		
$\diamond$	$\bigcirc$						12:150		
Polish Surface	Temporary Haits								
lime: 11:30a •		Dural	ion: 15 min	6 <b>*</b>		Break: None	• 12:30p		

5. Press the assistant icon of the staff member you want to perform the service.

_		Showre	untomer detail					Total: \$79.6
								104al - 9797
Polish				Price:	\$10.00	Add	seivice	Remove servi
						11.00a		
	0			Req	bested	11.154		
ain Jacqui	Motelle	pat	Gienn			11.00e	French Polis	h 🤮
		8	4			11.45e	\$10.00	80
tatt Justine	Caroline	Michael	Jan			12:00p		
1	Ü	2	2			12:150		
ison Margot	stock1	testpos	2222	142 101		17.16		
	an Jusine tat Jusine son Karpot	an Jacqui Michele Lat Justre Caroline Son Margot Stockt	ans Jacqui Michelle pat Jacqui Michelle pat Lat Justine Caroline Michael Son Hargot Stocht bestpos	an Jacqui Michaele pat Caroline Justine Caroline Michael Jan Sen Hargot Stocki Lestpoe 2222	Req and Jacqui Michaele pat Gienn Lat Judime Caroline Michael Jan Lat Lat Lat Lat Lat Lat Lat Lat Lat Lat	Requested and Jacqui Michaele pat Gienn Lat Justine Caroline Michael Jan Lat Justine Caroline Michael Jan	Image: state of the state	Requested       Image: Source of the second se

**Note:** Assistant icons are disabled if the staff member already has another appointment at that time. See *Editing the staff member for a service* on page 47.

If the staff member was requested by the customer, press
 See *Recording a staff request* on page 49.

Requested

- 7. If necessary, edit the service price, duration or break. See
  - *Editing the price of a service* on page 52.
  - *Editing the duration of a service* on page 54.
  - *Editing the break time of a service* on page 56.
- 8. Press Save

The service is added to the appointment.

# **Changing a service**

Edit a service when you want to change it to another service. For example, a hair salon customer originally requested a particular hair treatment and has changed their mind.

To edit the type of service:

1. Press the appointment you want to edit in the Schedule screen.

The Appointment screen is displayed.

Close				Арр	oîntmei	nt: 3 April	2014					Saya
Customer: Details:	Genna Bald	rý		<u>14</u>	Show	customer detai					Total:	\$69.00
9:15a - 10	0:00a: Den	ni Colour I	Medium				Price:	\$45.00	Ad	service	Remove	service
Service:	Demi Colour Long Tint Short	Section:	Colour Oems Colour Short	• Demi Catour XLong	TinfLong	Tint Medium	Tire Mens		9:00a 9:15a 9:35a 9:45a 10:00a	Demi Cole 345 38 Lodes Sh 524 88	ver Medium	eom eom Jacque
Assistant: Time: 9.15		Reschedule		tion. 15 mins	•			assaud 30 mins	10.304	Armer		माहोलन्त

 Press the service you want to edit in the Schedule area of the Appointment screen. The service is highlighted.

Customer: Gena Baldry Details:	1	Showes	stomer details			Total: \$69.0
9:15a - 10:00a: Demi Colou	ur Medium			Price: \$45.00	Add	service Remove service
Book SALON . Section	1: Colour •				91964	
Service:		-	_	_	8:15e	Demi Colour Medium
Colour Demi Colour Demi Col	lour Demi Colour Demi Colo		Tint Medium	Tint Mens	9:30e	\$45.00 eçin
Convetion Long Median		iur TintLong	rint neditim	THE SPECIA	8:454	
🔶 🔶 👘						
Tint Tint Short Regrowth					10:00a	Ladies Shpicutiow
					10.15e	\$24.50 Jacq
lssistant:	_			Requested	10.30a	
a an =	00 00	1000	100			

3. Press the service you want to switch to.

Customer: Genna Baldry	Show customer details	Total: \$34.00
9:15a - 10:15a: Tint Regrowth	Price: \$10.00	Add service Remove service
Book SALON • Section: Colour • Service: Colour Demi Colour Demi Colour Demi Colour Short Colour Short XLong Tint Reprodth	Tint Long Tint Measure Tint Stens	10.15a Tint Regrowth.
Assistant: Time: 9 15a • Duration: 16 mina	Requested Break: 45 mins	10.30a

4. Press Save

The new service is saved.

### **Editing the start time of a service**

Edit a service's start time when you need to move a service to another time without changing the time of its appointment.

To edit the start time of a service:

1. Press the appointment you want to edit in the Schedule screen.

The Appointment screen is displayed.

Close				Арр	ointmer	nt: 3 April	2014					Save
Customer: Details:	Genna Bald	ry	1		Show	customer detai					Total:	\$69.00
9:15a - 10	):00a: Dem	ni Colour I	Medium				Price:	\$45.00	A	d service	Remove	service
Service:		Section:	Colour Dems Colour Shart	• Demi Colour xLong	Thré Long	Tint Medium	Tire Mens		9:060 9:150 9:350 9:45a 10:60	545 30 Ladies 50 524 50	bur Medium	een een Jacqui
Assistant: Time: 915:		Reschedule	-	tion: 15 mins	·	-		gaestod 30 mins	10.30			mpleter

 Press the service you want to edit in the Schedule area of the Appointment screen. The service is highlighted.

Customer: Genna Baldry Details:		Show	ciestomer details		Total: \$69.00
9:15a - 10:00a: Demi Colo	ur Medium		P	rice: \$45.00	uid service 🛛 Romoro service
Book SALON . Secto	ni Colour	•		9196	<b>1</b> 22
				8.15	Count and a manual of
Colour Demi Colour Demi C Conection Long Media		mi Calour Tint Long	Tint Medium Tint Me	06:8	545.00 eçtin
• •				÷45	•
Tint Tint Short Regrowth				10.0	Da Ladies Shpicutiow
ssistant				Requested	100 million (100 million)
			-	10.3	Da
ime: 9.15a •	Duration	15 mins •	Br	eak: 30 mins ·	

3. Press the **Time** field.

Customer: Genna Baldry Show costom	ar details Total \$69.
9:15a - 10:00a: Demi Colour Medium	Price: \$45.00 Add service Remove serv
Baok SALON • Section: Colour • Service: Colour Dems Colour Short X Long Tint Long Tint N Tint Short Tint Short	Redum Tint Mens
Assistant:	Break: 30 mins •

4. Select the new time of the service.

**Note:** The duration period of the service can overlap another service's break period, but it cannot overlap another service's duration period.

5. Press Save

The new start time for the service is saved.

### Editing the staff member for a service

Edit the staff member of a service if you want the service to be allocated to a different staff member.

To edit the staff member for a service:

1. Press the appointment you want to edit in the Schedule screen.

The Appointment screen is displayed.

Close				Арр	ointmer	ıt: 3 Aprīl	2014					Save
Customer: Details:	Genna Bald	lry			Show	ustomer detai					Total:	\$69.00
9:15a - 10	:00a: Den	ni Colour I	Medium				Price:	\$45.00	A	d service	Remove	service
Book SAL	.0N •	Section:	Colour	•					91864			
Service:									9:15e	Demi Colo	ur Medium	0
•						$\bigcirc$	$\bigcirc$		9:30e	\$45.00		estn
Colour C Correction	Demi Colour Long	Dens Colour Medium	Demi Colour Short	Demi Colour X Long	Tint Long	Tint Medium	Tint Mens					
0									9:454			
	Tint Short								10:00a	Ladies Sh	picutitiw	
Regrowth									10.154	524.50		Jacqui
Assistant							Re	quested				
00	-		60		-	1000			10.304			
Time: 9.15a	0.2		Dura	tion: 15 mins			Break:	30 mins	•			

 Press the service you want to edit in the Schedule area of the Appointment screen. The service is highlighted.

Customer: Genna Baldry Details:		Show	sstomer details			Total: \$69.0
9:15a - 10:00a: Demi Colou	ır Medium			Price: 545.00	Ridd	service Remove service
Book SALON . Section	Colour •				1	
iervice:				-	8:15e	Demi Colour Medium
Colour Demi Colour Demi Col	our Demi Colour Demi C	clour Tirri Long	Tint Medium 1	Tint Mens	9:30e	345.00 ectr
torrection Long Nection					8:45a	
Tint Tint Shart Regrowth					10:00a	Lades Storcuttow
					10:15#	\$24.50 Jacq
ssistant:				Requested	10.304	
an _ an _ =	0.00	-	1000		_	

3. Press the assistant icon of the staff member you want to allocate to the service.

Customer Details	Genna Ba	idry			Show	volumer details			Total: \$69.0
9:15a - 1	0:00a: De	emi Colour M	ledium				Price: 545.00	Add	service Remove service
look s	ALON •	Section:	Colour	•				91964	
ssistant.		_					Requested	9:15e	Demi Colour Medium
		0	9	0	9	92		9:30e	545.00 ectr
Certi	Laurer.	eom	United.	Anzenite .	241	Cherry		8:45a	
9	92	9	2	2	93	94		-	
(cuine	- 844	Nette	Jug Brue	Cartillor	anch an	.101		10:00a	Ladies Shorouthw
	9	9	9	92	2	9		10.154	144 JU 1903
Leign.	3/10	-	Alegat	aniced	10-010-0-0	9222		10.30a	
me: 9.1	5a 💌		Dura	tion: 15 mini			Break: 30 mins .		

**Note:** Staff members are disabled if they are booked for another service that would clash with this service.

4. Press Save

The new staff member booking is saved.

### **Recording a staff request**

Record a staff request when a customer has asked for a specific staff member for a service or appointment.

To record a staff request:

1. Press the appointment you want to edit in the Schedule screen.

The Appointment screen is displayed.

Close				Арр	ointmer	ıt: 3 April	2014				Sav
Customer: Details:	Genna Baldi	y D			Show	sedomer detai					Total: \$69.0
9:15a - 10	:00a: Dem	ni Colour I	Aedium				Price:	\$45.00	Ad	d service	Remove servic
Book SAL	on •	Section:	Colour	•					91964		
Service:		_	2						9:15e	Demi Colour	Medium 👩
		Oers Colour	Oems Colour	Oemi Colour	TinfLong	Tint Medium	Tint Mens		9:36e	345.00	esir
Correction	Long	Medium	Short	XLong					8:454		
Tint Regrowth	Tint Shart								10:00a	Ladies Shpro	uttew 🔮
									10:15e		1111
Assistant:		_					Re	quested	10.304		
Time: 9.15a	-	-	Dura	tion: 15 mins	•	100	Break:	30 mins	-		

 Press the service you want to edit in the Schedule area of the Appointment screen. The service is highlighted.

Customer: Gerna Baldry	Show costomer details	Total: \$69.0
9:15a - 10:00a: Demi Colour Medium	Price: 545.00	Add service Remove service
Book: SALON • Section: Colour •		9-96a
		9:158 Demi Colour Medium
Colour Demi Colour Demi Colour Demi Colour	Inf Long Tint Medium Tint Mens	9:30e
Correction Long Hestum Short X Long		0.45a
Tet Tel Short		10.80a Lades Storcutow
Regrowth		524.50 Jacq
ussistant.	Requested	10.30a
Time: 9.15a • Duration: 15 mins	Break: 30 mins •	

3. Press the assistant icon of the requested staff member.

Customer Details:	Genna Bal	dry			Show e	vedomer details			Total: \$69.0
9:15a - 1	0:00a: De	mi Colour N	ledium				Price: 545.00	Add	service Remove servic
Book S	LON .	Section:	Colour	•				91964	
Assistant.							Requested	9:15e	Demi Colour Medium
9	2	0		0	97	9		9:30e	545.00 ecit
Chris	Lauren	eoin	Unclus.	ANZHARA.	2.01	Cheven		8:454	
92	9	(F)	2	2	93	95			
(ute	80	Not	Justice	Cartin	an chairt	store		10:00a	Ladies Shpicution
9	9	9	9	91	92	9		10.15e	524.50 Jaco
Leigh.		Allgan	Alacant	aniced	1001010	0202		10.3Da	
ime: 9.1	5a . *		Dura	tion: 15 mini			Break: 30 mins .		

4. Press Requested

Custome Details:	C Genna Ba	idry		4	Show e	ustrimer details			Total \$69
9:15a -	10:00a: De	mi Colour I	Medium				Price: 545.00	Add	service Remove ser
Book s	ALON .	Section:	Colour	•				91964	
ssistant.							Requested	9:15e	Demi Colour Medium
9		0	9	0	9	92		9:30e	345.00 6
2000	Lagent	eoin	Junitary of	20120-010	241	Cheve		8:454	
9	9	67	2	2	93	94			
(cute	80	Not	14000	Cathor	and an	1.000		10:00a	Ladies Shpicutiow
9	9	9	9	91	92	9		10:154	104 M
Leign.	alte	40100	Alactor	aniced	10010-0	0202		10.30a	
ime: 91	5a •		Dura	tion: 15 min			Break: 30 mins .		

The staff member request is recorded.

# **Editing the price of a service**

Edit the price of a service if you need to change how much a customer will be charged for an appointment or particular service.

**Note:** This procedure only changes the price of the service for the selected appointment. No other appointments are changed.

To edit the price of a service:

1. Press the appointment you want to edit in the Schedule screen.

The Appointment screen is displayed.

Close	Appointment: 3 April 2014	Save
Customer: Genna Baldry Details:	Show customer details	Total: \$69.00
9:15a - 10:00a: Demi Colour Medium	Price: 545.00	Add service Remove service
	I Colour Tint Long Tint Medium Tint Mens	9466 9-15a Demi Colour Medium 9-25a Station for the state of the st
Assistant:	15 mins  Break: 30 mins	10.304

 Press the service you want to edit in the Schedule area of the Appointment screen. The service is highlighted.

	ni 2014
Customer: Genna Baldry Show contonner det Details.	Total: \$6
9:15a - 10:00a: Demi Colour Medium	Price: \$45.00 Add service Remove ser
Book SALON • Section: Colour • Service: Colour Demi Colour Demi Colour Demi Colour Tir/Long Tir/Ling	Britse Demi Colour Medium 345 30 930e
Conection Long Hedian Short XLong History Interded Text Text Short	10-804 10
Assistant: Time: 9.15a • Duration: 15 mins •	Requested Break: 30 mins

3. Press the **Price** field.

Customer: Genna Baldry Details:	7	Show	contorner details			Total: \$69.00
9:15a - 10:00a: Demi Colou	r Medium			Price: \$45.00	Add	service Remove service
Book SALON • Section Service: Colour Demi Colour Demis Colour Correction Demis Colour Demis Colour Tint Shart Regrowth	our Demi Colour Dem	n Calour Long	Tint Medium Tin	Z Dienis	8:15a 9:30a 8:45a 10:60a 10:15a	Demi Cotour Medium 545 32 ectin Ladies Shprouttow
Assistant:	A	15 mins •	-	Requested Break: 30 mins	10.30a	

- 4. Type the new price of the service.
- 5. Press Save

The new service price is saved.

# **Editing the duration of a service**

Edit the duration of a service when it is likely to take more or less time than the standard service. For example, if the customer has made a specific request that requires more time.

**Note:** The service duration is only edited for this appointment. No other appointments or services are changed.

To edit the duration of a service:

1. Press the appointment you want to edit in the Schedule screen.

The Appointment screen is displayed.

Customer: Genna Baldry	Show contorner details	Total: \$69.00
Details. 9:15a - 10:00a: Demi Colour Medium	Price: 545.0	0 Add service Romove service
Book SALON • Section: Colour • Service: Colour Demi Colour Demi Colour Demi Colour Demi Colour Convertion Shart XL		9:06a 9:15a 9:15a 9:20a 9:20a 9:20a 10:00a 10:00a 10:15a 10:15a
Assistant:	15 mins • Break: 30 mi	10.30a

 Press the service you want to edit in the Schedule area of the Appointment screen. The service is highlighted.

Close	_	_	_	Арр	ointmer	ıt: 3 April	2014	_	Save
Customer: Details:	Genna Bald	ry	1		Show	ceatumer detai	k.		Total: \$69.00
9:15a - 10	):00a: Den	ni Colour I	Medium				Price: 545.00	Add	Service Remove service
Book SA	LON .	Section:	Colour	•				91064	
Service:		_	2					9:15e	Demi Colour Medium
•	•				•		٠	9:30e	545.00 eqtn
Colour I Correction	Demi Colour Long	Dens Colour Medium	Demi Colour Short	Demi Colour X Long	Tint Long	Tint Medium	Tint Mens	11000	
•	•							9:45a	
Tint Regrowth	Tint Shart							10:00a	Ladies Shprcuttow
								10:156	524.50 Jacqu
Assistant:							Requested	10.304	
Time: 9.15:		-	Dura	tion: 15 mins	-	-00	Break: 30 mins	•	
Ganceluppe	ninoment 1	Reschedule		NO.				-	Anneel Completed

3. Press the **Duration** field.

Customer: Gerna Baldry Show	castomer details		Total: \$69.00
9:15a - 10:00a: Demi Colour Medium	Price: \$45.00	Add	service Remove service
Baok SALON • Section: Colour • Service: Colour Demi Colour Demi Colour Demi Colour Tirk Long Convection Demi Colour Bhat Demi Colour Tirk Long Tint Tent Shart	Tint Medium Tint Mena	9:15e 9:36e 9:45e 10:40e	Demi Cotour Medium 545 30 ecin Ladies Sharcutbw 524 38 Jacqu
Assistant: Duration: 15 mins •	Requested Break: 30 mins •	10.30a	

4. Select the new duration of the service.

**Note:** The duration period of the service can overlap another service's break period, but it cannot overlap another service's duration period.

5. Press Save

The service duration for this appointment is saved.

## Editing the break time of a service

Edit the break time of a service when the customer is likely to need more or less time waiting after the active portion of their service. For example, at a hair salon, a particular hair colour may need a longer period to set in a customer's hair.

**Note:** The service break time is only edited for this appointment. No other appointments or services are changed.

To edit the break time of a service:

1. Press the appointment you want to edit in the Schedule screen.

Close Appointment: 3 April 2014 Save Show customer details Total: \$69.00 Customer: Genna Baldry Details 9:15a - 10:00a: Demi Colour Medium Price: \$45.00 Book SALON . Section Colour ٠ Service 9:154 Demi Colour M Ø 345 20 ecin 9.354 Tint Mens TintLong Tint Medium Medium Demi Colour Demi Colour XLong Short 8.450 Ladies Shold 9 Tirt Shor \$24.50 10:154 Assistant 0.304 Break: 30 mins . Time: 9.15a • Duration: 15 mins .

The Appointment screen is displayed.

 Press the service you want to edit in the Schedule area of the Appointment screen. The service is highlighted.

	ni 2014
Customer: Genna Baldry Show contonner det Details.	Total: \$6
9:15a - 10:00a: Demi Colour Medium	Price: \$45.00 Add service Remove ser
Book SALON • Section: Colour • Service: Colour Demi Colour Demi Colour Demi Colour Tir/Long Tir/Ling	Britse Demi Colour Medium 345 30 930e
Conection Long Hedian Short XLong History Interded Text Text Short	10-804 10
Assistant: Time: 9.15a • Duration: 15 mins •	Requested Break: 30 mins

3. Press the **Break** field.

Customer: Genna Baldry			tow costomer detai			Total:	\$69.00
Details.							
9:15a - 10:00a: Demi Colo	ur Medium			Price: \$45.00	Add	service Remove	service
Book SALON . Section	On Colour	•			91964		
iervice:					3:15e	Demi Colour Medium	0
🤛 🔶 🔇		🔶 🍕		<b>P</b>	9:30e	545.00	eșin
Colour Demi Colour Dens C conection Long Medi		emi Colour - Tint L X Long	ing Tint Medium	TintAlena			
					8:454		
Tent Tent Shart					10:00a	Ladies Shpicut/bw	
Regrowth					10.156	524.50	Jacqu
ssistant				Requested			
-			1.000		10.304		
ime: 9.15a •	Duratio	n: 15 mins •		Break: 30 mins			

4. Select the new break time of the service.

**Note:** The break period of a service can overlap with another service.

5. Press Save

The break time for this service in the appointment is saved.

### **Removing a service from an appointment**

Remove a service from an appointment when a customer does not want the service performed, or you have accidentally added an extra service that is not required.

Note: Appointments must contain at least one service.

To remove a service:

1. Press the appointment you want to edit in the Schedule screen.

The Appointment screen is displayed.



 Press the service you want to edit in the Schedule area of the Appointment screen. The service is highlighted.

Close	4	ppointment: 3 Apr	1 2014	_	Save
Customer: Genna Baldry Details:		Show costumer de	taily		Total: \$69.00
9:15a - 10:00a: Demi Colou	ur Medium		Price: \$45.00	Aidd s	arvica Ramova servica
Book SALON . Section	1. Colour •			9:06a	
Service:				9:158	Demi Colour Medium
🔶 🍝 🍝	• • •	•	٠	9.30e	S45 00 ecin
Colour Demi Colour Demi Colour Correction Long Medium			n Tint Mena		
• •				8:454	
Tent Tint Short Regrowth				10:00a	Ladies Shpicution
				10.15e	\$24.00 Jacqui
Assistant:			Requested	10.30a	
00 00 -	00 00	00.00		-	
Time: 9.15a •	Duration: 15	nins 🔹	Break: 30 mins	• E	

3. Press Remove service

Customer: Genna Baldry Details:		4	Showre	velomer detail			Total:	\$69.0
9:15a - 10:00a: Demi Colo	our Medium				Price: \$45.00	Ritta	service Remove	servici
Book SALON . Section	on Colour	•						
Service:		-	-			8:154	Demi Colour Medium	0
Colour Demi Colour Demi C Correction Long Medi		Demi Colour X Long	Tinf Long	Tint Medium	Tint Mens	9:30e	340.00	eçin
• •						8:454		
Tint Tint Short Regrowth						10:00a	Lodies Shprout/ow	Jacq
						10:156		
ussistant:					Requested	10.30a		
ime: 9.15» •	Dural	tion: 15 mins		100	Break: 30 mins			

The service is removed from the appointment.

## **Duplicating an appointment**

Duplicate an appointment when a customer wants to copy an entire appointment to another date and time. All service details including the staff, price, duration and break time are retained.

**Note:** If you duplicate the appointment to a different time, the times of any subsequent services in the appointment are relative to the new time. For example, if the duplicated appointment starts an hour earlier, all services within the duplicated appointment start an hour earlier than the original.

If you want to move an appointment, rather than creating a copy of it, see *Rescheduling an appointment* on page 63.

To duplicate an appointment:

1. Press the appointment you want to duplicate in the Schedule screen.

The Appointment screen is displayed.

Customer: Genna Baliny	Show customer details	Total: \$69.0
9:15a - 10:00a: Demi Colour Medium	Price: \$45.00	Add service Remove servic
Book: SALON • Section: Colour •		9:00a
Service.		8 150 Denvi Colour Medium
Colour Demis Colour Demis Colour Demis Colour Short X Long	Tast Long Tint Medium Tint Menie	9-20e
and the second second		S «ta
🔷 🔷		10:004
Tint Tint Short Regrowth		10:000 Ladies Shprubbw
		10:15e
ssistant	Requested	10.30#
ime: 9 15a • Duration: 15 mins	Break: 30 mina	
Cancel appointment Reschodule Freedback		Animal Complete

2. Press Reschedule

The Reschedule appointment screen is displayed.

Customer Details:	Genna Ba	idiry	1		Show	contomer details			Total: 1	\$79.00
9:15a - 1	0:00a: De	mi Colour	Medium				Price: \$45.00	Add	seivice Remove	servici
	ALON	Section:	Colour	i i i i i i i i i i i i i i i i i i i	0	Gienn Gienn Str		9:00a 5:15a 5:20a 5:41a	Denvi Colour Medium 145.00	
64 - F0	ve this appr	2 We 3 10 4 Fr	Mar Apr	2012 2013 2014 2015 2016	20 45 21 00 9 16 10 30 11 45	appointment	Break 30 mina	10.10e	Ladies Shpruthw	Jacqu

3. Select the date and time you want the rescheduled appointment to start.

**Note:** The first service in the appointment starts at the selected time.

4. Press Create new appointment

The duplicate appointment is displayed at its new time and date.

Close	Appoint	ment: 4 April 2014	_	36
Customer: Genna Baility Details:		how customer details		Total: \$79.00
9:15a - 10:00a: Demi Colour M	ledium	Price	\$45:00 Add	seivice Remove service
Book: SALON . Section:	Colour •		9:00a	
Service:			E+Sa	Demi Colour Medium
Colour Dems Colour Dems Colour Correction Long Medium	Dem Colour Dem Colour Tatl Short X Long	ong Tirt Nedium Tirt Mens	9.204	
🗣 🗣			10:00a	
Tint Tunt Short Regrowth			10.15a	Ladies Digroutow
Assistant			questori 10 30e	
Time: 9-15a •	Duration: 15 mins •	Break:	30 mina •	

**Note:** If the selected staff member has a clash for a particular service, an icon is displayed in the time slot of the Schedule area.

- 5. Select new staff members for services, if required.
- 6. Press Save

The appointment is duplicated to the new time and date.

# **Rescheduling an appointment**

Reschedule an appointment when a customer wants to move an entire appointment to another date and time. All services details including the staff, price, duration and break time are retained.

If you want to cancel an appointment, rather than moving it to another time or day, see *Cancelling an appointment* on page 66.

To reschedule an appointment:

1. Press the appointment you want to edit in the Schedule screen.

The Appointment screen is displayed.

Customer: Genna Baktry		how customer details	Total: \$69.00
9:15a - 10:00a: Demi Color 300k: SALON • Section		Price: \$45.00	Add service Remove service
Colour Correction Correction		ang Tint Medium Tint Mens	9 45a 9 45a
Tint Turt Short.		Requested	10:00e Ladies Shprout/ow 20 304:00 Jaco
ime: 9 15a •	Duration: 15 mins •		10 30e

2. Press Reschedu

The Reschedule appointment screen is displayed.

Details:	Genna Baldi	Y]			Showr	untonner detail	2		Total: 1	\$79.0
9:15a - 1	0:00a: Dem	i Colour I	Medium				Price: \$45.00	Add	seivice Remove	servic
Book SA	LON .	Section:	Colour	•	-			9:00a		
	Pained	eoin	-140000	100000	1.0	Glann		9150	Demi Colour Medium	0 +ck
2	2	2	2	2		2		9.20#		
Whe	en would ye	ou like to	reschedule	this appoir	ntment to?	Chose	1	9.4ta		
4		2 We	Mar 3	2013 21	45			10:00a	Ladies Digitation	
8		3 Th 4 Fr		2014 1	0 15 0 30			10 154	824.05	Jacq
A		5	Jun	11	45			10.554		

3. Select the date and time you want the rescheduled appointment to start.

**Note:** The first service in the appointment starts at the selected time.

4. Press Move this appointment

The appointment is displayed at its new time and date.

Close Ap	pointment: 4 April 2014	36
Customer: Genna Baldry Details:	Show customer details	Total: \$79.00
9:15a - 10:00a: Demi Colour Medium	Price: \$45	00 Add service Remove service
Book: SALON . Section: Celour .		9:00a
Service Cotour Cotour Cotour Dems Cotour Dems Cotour Cot	Tint Long Tint Medium Tint Mene	B 150 Demi Colour Medium 9 300 S 200
Tint Turt Short		10:00a Ladies Digrout/low g 324:00 Jacip
Assistant:	Roquent s • Break: 10 r	10.35#

**Note:** If the selected staff member has a clash for a particular service, an icon is displayed in the time slot of the Schedule area.

5. Select new staff members for services, if required.



The appointment is rescheduled.

### **Cancelling an appointment**

Cancel an appointment if the customer has decided not to attend. Appointments can only be cancelled if they have not been marked as completed.

**Note:** This cancels the entire appointment. If you want to remove one or more services from the appointment without cancelling the entire appointment, see *Removing a service from an appointment* on page 58.

To cancel an appointment:

1. Press the appointment you want to edit in the Schedule screen.

Close Appointment: 3 April 2014 Save Show customer details Total: \$69.00 Customer: Genna Baldry Details: 9:15a - 10:00a: Demi Colour Medium Price: \$45.00 Add serv Book SALON . Section: Celour . Service 115e where Cold 0 145.00 a cie 9.204 Dami Coli Tirit Mains enti Colos mi Cele TittLond Tint Medium Medium Long Short Xtong ista 10:00 I action Th Tint Short 9 Tirri Regi 124.00 0.154 Assistant 0.004 Time: 9:15a \* Duration: 15 mins . Break: 30 mina · Reachedule Feedback ad a **Cancel appointment** Press

The Appointment screen is displayed.

2

Customer: Genna Baldry Details:			Showro	unkomer detail				Total: :	\$69.0(
9:15a - 10:00a: Demi Cole	our Medium				Price:	\$45.00		service Remove	service
look SALON . Section	on: Colour	•					9:00a		
		-	_				5154	Demi Colour Medium	0
Colour Demi Colour Demi C Correction Long Med		Demi Colour X Long	TetLong	Tint Nedium	Tint Mens		9.20+	845.00	e ditt
• •							9.45a		
Tint Tint Short Legrowth							10:08a	Ladies Digitation	Jacq
ssistant					Req	unsterd	10.15a		
me: 9.15a •		ION: 15 mins	-	100	Break:	30 mina •	10,004		

The Confirmation screen is displayed.

Close	Appointment: 3 J	tpril 2014			Sterr
Customer. Generalitatity Details	Steele containe			Total	\$89.00
9:15a - 10:00a: Demi Colour Medium		Price: 545.00	Addam	ntco) (Hermore	pinikar
Book: SALON . Section: Colour			Ditta		
Service				entri Criterer Merdium	0
	Are you sure you we	th to cancel		45.00	-
Caleur Cerri Cidour Carrie Caleur Correction Long Middum Short	Den this appointm				
			1424		
Ten Det Deur			11100	ades Starcatility	9
Magrowm			-	04.00	Jacout
Assistant			THE REAL PROPERTY OF		
		Heybersteil	10.554		
Time: 3 1% • Dut	abort: 15 mins •	Break: 30 mins	i		
Concil approximate Headinghiles Free	-tt		1		

3. Press Yes

The appointment is cancelled.

### Marking a customer as arrived

Mark a customer as arrived so you can tell which appointments need to be cancelled or rescheduled if a customer does not attend their appointment.

To mark a customer as arrived:

1. Press the appointment you want to edit in the Schedule screen.

The Appointment screen is displayed.

Appointment: 3 April 2014	Save
Show customer details	Total: \$69.00
Price: 545.00	Add service Remove service
Nour Tire Long Tint Medium Tire Mens	8x86e       8x15e       9x36e       9x36e       8x45e       10x80a       Ladies Shproutby       9x34e       10x15a
Requested	10.30w
	Price: §45.00

2. Press Arrived

Customer Details	Genna Ba	idry			Show e	estomer details			Total: \$	69.00
	11:15a: L	adies Shp/	cut/bw				Price: \$24.00	Add	service Remove s	enia
Book s	ALON .	Section:	CUTS	•				91964		_
ssistant							Requested	9:15e	Demi Colour Medium	0
9	0	97.			-	2		9:30e	545.00	ectr
Ciniti	Lauren	****	Jacqui	Materin	249	Glenn		8.454		
2		2	4	۵	0	4				
Luke	Bob	Matt	Justine	Caroline	Michael	Jan		10:00a	Ladies Shpicut/bw	
2		*	2	<u>I</u>	2	0		10:15#	524.50	Jacq
Leigh	Julie	Alison	Hargot	stock1	testpes	2222		10.3Da		
Time: 10	00a •		Dura	tion: 1% hos	e. •		Break: None			

The customer is marked as arrived.

A yellow check mark is placed next to all their scheduled services.

	Date		-				Appoin	itments				
1		2012	1		0	0			0	0		
2 We	Mar	2013			200		- A -		<b>2</b>	2	-	
a m	Apr	2014		Chris	Lauren	eon	Jacque	Michelle	pat	Glenn	Luke	
4 Fr	May	2015	9:00a					Wrande 🥑				
5	Jun	2016	9 154	Maria Tratas	Anter Owens	Ganna	Atthu:	Kerr	Justine Boper	1	Ngel Norsatana	í.
Yesterd	ay	)	-			Baldry	Vitrouius			J		
		114	9:30a									
Today		3	9.45a	Ross Britten	Lauren 💙 Guatteri					Brad White 🥩		
Tomorr	ow	>	10:00a			-	Genna	1	Allean Ridge			
Wednes	day	2	10:158			Justine Roper	Balory -	1		J		
Thursda	NY .	,	10.30#									
Friday		ಿ	12.45#	Brad White 🚽								
Saturda	y	3	11:00a					Lauren 🗸 Gusteri				
Sunday	j.	>	11.15#			-						
Next Mo	onday					Genna Baldry						
1	tum av	way	11:458									

## Marking an appointment as completed

Mark an appointment as completed when all services have been fulfilled and the customer is ready to pay for the appointment.

**Note:** Appointments can only be imported into the Point of Sale for payment after they have been marked as completed.

To mark an appointment as completed:

1. Press the appointment you want to edit in the Schedule screen.

The Appointment screen is displayed.



Customer: Genna Baldry Show cust	omer details	Total: \$69.0
9:15a - 10:00a: Demi Colour Medium	Price: 545.00	Add service Remove service
Book     SALON     Section:     Colour     •       Service:     Image: Colour Short Colour Colour Tint Long     Image: Colour	event Medium Tinz Mena	Britfie     Demi Colour Medium       Britfie     345.00       Britfie     60m       Britfie     40m       Britfie     Lodies Shprouttow       Britfie     Jacque       10:156     534.80
Assistant:	Requested Break: 30 mins	10.30a

The appointment is marked as completed.

A green check mark is placed next to all their scheduled services.

Date						Appoin	itments				
2 We Mar 2 Th Apr	2012 2013 2014		Chris	Lauren	eon	Jacque	And the last	2	Glenn	Luite	Þ
4 Fr May	2015	9:00#				_	Nrande 🖌 Kerr				Ì
Yesterday	,	8 30e	Maria Fredax	Anther Owene	Ganna 🦉	Arthu 🤎 Ritroides		Justine Roper	J	Nigel Norsatas	
Today	>	3,458	Ross Britten	Lauren 🗸					Brad White 🥩		
Tomorrow	>	10:00a				Genna 🕑		Allean Ridge			
Wednesday	>	10 156			Justine Roper	and a			,		
Thursday	>	10.38#									
Friday	>	12:45#	Brad White 🤟								
Saturday	>						Lauren < Gusteri				
Sunday	>										
Next Monday	)	11:35+			Genna Balary						
🖈 Turn av	way										

### **Recording customer feedback**

Record customer feedback about an appointment to keep track of a customer's satisfaction, or any complaints or comments they had about the services they received.

To record customer feedback:

1. Press the appointment you want to edit in the Schedule screen.

The Appointment screen is displayed.

Close	Ар	pointment: 3 Apr	11 2014	_	Save
Customer: Genna Baldry Details:		Show castomer de	stants		Total: \$69.0
9:15a - 10:00a: Demi Color	ur Medium		Price: \$45.00	Add	service Remove service
Book SALON . Section	n. Colour •			91064	
Service:			-	8:15e	Demi Colour Medium
🔶 🍐 🦂	• • •	<b>•</b>	<b>*</b>	9:30e	545.00 ectn
Colour Demi Colour Demi Co Correction Long Mediu		Tint Long Tint Mediu	m Tint Mens	1454	
Tent Tent Shart				10:00a	Ladies Shprout/by
Regrowth				10.156	524.00 Jacqu
Assistant			Requested	10.(20	
		-		10.30a	
Time: 9.15a •	Duration: 15 min	10. T	Break: 30 mins •	Ř	

2. Press Feedback.

Close	,	oppointment: 3 April	2014	_	Save
Customer: Genna Baldry Details:		Show cestumer deta			Total: \$69.00
9:15a - 10:00a: Demi Col	our Medium		Price: 545.00	Add service	Remova servica
Book BALON • Secti Service: Colour Demo Colour Demo Colour Contection Demo Colour Demo Colour Tent Contection Tent Short Regrowth	Demi Colour Demi Col	ur TinfLong TintMedium	Tire Mens	9:30e 9:45a	s Shpreutiow
Assistant: Time: 9.15a •	Duration: 15	nins •	Requested Break: 30 mins	10 30a	

3. The Feedback screen is displayed.

Customer	Genna Balo	dry			Showe	kalumer deta				Total: \$79.0
Details:	11-45a- Er	ench Polis	h.				Price:	F+0.00		service Remove service
1000	ALON *	Section:	Highlights	•			File.	10.00	9:06a	innend Connectionities
									9:15e	Demi Colour Medium
oils Long 1/2 Head	Folis Long 1/4 Head	Fots Long 3/4 Head	Foits Long Each	Folls Long Full Mead	Folts Medium 1/2 Head	Folis Medium 1/4 Head	Foils Nedium 3/4 Head		9:308	
Fols	Folts	Fols Short	Folls Short	Folls Short	Foils Short	Folls Short	Foils X Long		10:00a	Ladies Shproutlow
Nedium Each	Medium Full Head	1/2 Head	ti4 Head	3/4 Head	Each	Full Head	1/2 Head		10:15e	\$24.50 Jaco
Plea	ase enter t	he custom	er's feedba	ck below:	Close		٠		10.3Da	
îm (							Break;	None	•	

Type the customer's feedback and press
 The feedback is recorded.

### **Turning a customer away**

Turn away a customer when you are unable to book an appointment or service at the time the customer wants. You can use these records to note especially busy times when you have lost sales.

To turn away a customer:

1. Press **Turn away** on the Schedule screen.

Date		Appointments										
2 We Mar	2012	1		2	0		2	2	2	2	,	
3 Th Apr	2014		Chris	Lauten	ecin	Jacqui	Michelle	pat	Glenn	Lutim		
4 Fr May	2015	9:00a	1	1			Miranda 🤟	1				
5	2014	8154	Maria Fresas	Anther Owens	Genna Balory	Artha 🧳	Aut	Justine Roper	1	Nigel Norstes		
resterday	>	8.308	L		-	OCC1988	<u> </u>		5			
Today	>	9.454	Rase Britten	Lauren 💞 Quateri	1				Bred White 😽		1	
Tomorrow >		10:00a		Lessee 10		Gerna Baldry	1	Alson Rege				
Friday >		10:15#			Justine Roper			2				
Saturday >		10.308				1						
Sunday >		10.45#	Brad White 🤘									
Monday >		11.00a					Louien y Guittert	1				
Tuesday	>	11:15a										
Next Wednesday >					Genna Baldry							
		11.454										
General	and a second	12:00p										
🖈 Turn av	Mary	12:15p										

2. The Turn away customer screen is displayed.

		Date						Appoin	tments				
3	Th:		2012 2013 2014		Chris	Lauten	esin	Jacqui	Alichelle	2 pat	Gienn	Luter	,
4 5 Yeste		May Jun y	2015	9:00a 8:15a	Maria Presas	Anther Owens	Getna Balory	Artha 💜 Utroales	Miranda 🤟 Karr	Justine Roper	]	Nigel Nomates	
Today		w		0.308 0.454	Rose Britten	Lauren 🤟 Guatteri					Brad White 💙		
Friday >		0 10:154			Justine Roper	Gerna Baldry		Alson Ridge					
Sund	ay		1	10.454	Brad White	]							
Nond Tue Nex	Tu Bo	rn awa ok: SA ason: (	y custor	ner	on: Highlights	•		Clone	Guatari				

- 3. Select the **Book** and **Section** of the service the customer wanted.
- 4. Type in a brief note about why you had to turn the customer away.
- 5. Press Send

The turn-away is recorded.

# Glossary

### Appointment

#### Appointment

An appointment is an entry for a customer in the Scheduler that represents one or more specific services scheduled at a particular time for the customer. It can be retrieved by the Point of Sale and added to a transaction. Appointments can be rescheduled, cancelled or duplicated.

#### Assistant

#### Assistant

An assistant is the staff member who performs a service for a customer. Assistants are not linked to Point of Sale operators or the Portal users.

#### Book

#### Book

A book is a main category of services available at your site. For example, a beauty salon may have hair services, nail services and skin-care services. The categories and contents of a book are not related to any product inventory in the Point of Sale or Portal.

#### Break

#### Break

The service's break is the period of time that the customer is required to remain on the site, but no staff member is actively required. For example, a hair dying service has a period of time where the customer must wait for the applied dye to set. A service's break time can overlap the duration or break time of another service scheduled for the same customer or staff member.

#### Duration

#### **Duration**

A service's duration is the length of time the staff member is actively required for the service. For example, a hair dying service requires the staff member to apply the dye. A service's duration cannot overlap the duration of another service that is scheduled for the same customer or staff member.

#### Scheduler

#### Scheduler

The Scheduler runs separately to the Point of Sale to manage service appointments. It can link into the Point of Sale via the base station to process payments for those services in transactions.

#### Glossary

#### Section

#### Section

A section is an optional sub-category within a book on the Scheduler. For example, a beauty salon may have a book for hair services, and within the book may have sections for colouring, cuts and styling.

#### **Time-slot**

### **Time-slot**

A time-slot is a fifteen-minute period at a specific date or time, during which one service can be scheduled. Services may take more than one time slot, but two services cannot be scheduled for the same time slot, even if their combined duration is less than fifteen minutes.

#### **Turn-away**

#### **Turn-away**

A turn-away is a denial of service to a customer, either because you don't have the staff or resources available for the service they want, or because you cannot or will not provide the requested service to them. Turn-aways record the book and section of the requested service, and a brief explanation of why the customer was refused.

# Index

	Α		D		
appointment, 10		duration, 54			
cancel, 66			F		
completed, 70		feedback, 72			
create, 25			р		
duplicate, 60		reachadula 62	R		
edit, 5		reschedule, 63			
feedback, 72			S		
reschedule, 63		service, 39			
	В	break, 56			
break, 56	D	duration, 54			
break, 50		price, 52			
	С	staff, 47			
cancel, 66		time, 45			
customer, 19		type, 43			
arrived, 68			Т		
create, 30		time or 74			
scheduler, 27, 33		turn-away, 74			