



Scheduler

User Guide

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Managing appointments

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.

Managing appointments

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.



Schedule screen key fields and buttons

Field	Description
	Select a day to view the appointments for.
<p>Yesterday ></p> <p>Today ></p> <p>Tomorrow ></p> <p>Friday ></p> <p>Saturday ></p> <p>Sunday ></p> <p>Monday ></p> <p>Tuesday ></p> <p>Next Wednesday ></p>	Select to display the appointments for a day in the coming week, or the previous day.
	Press to turn away a customer. See <i>Turning a customer away</i> on page 74.

Field

Description



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
9:30a			
9:45a	Ross Britton	Lauren Guatteri ✓	
10:00a			
10:15a			Justine Roper

The scheduled services and free time-slots for each staff member on the selected day.

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.




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



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. Note: You can leave this field blank for a walk-in customer.
	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.

Managing appointments

Service area

Close Appointment: 3 April 2014 Save

Customer: Show customer details Total: \$0.00

Details:

9:15a - 9:30a: (Please select a service) Price: \$0.00 Add service

Book: SALON Section: Colour

Service:

Colour Correction Demi Colour Long Demi Colour Medium Demi Colour Short Demi Colour X Long Tint Long Tint Medium Tint Mens

Tint Regrowth Tint Short


Assistant: Disconnect

Time: 9:15a Duration: 15 mins Break: None

Reschedule Feedback Arrived Completed

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. <i>See Editing the price of a service on page 52</i>
Book	Select the category of service you want to add.
Section	Select the subcategory of service you want to add.

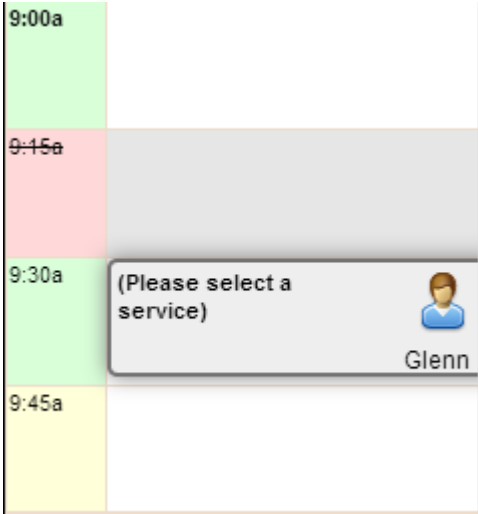
Field	Description
Service	<p>Press a service icon to book that service for the currently selected time slot.</p> <p>See <i>Adding a service to an appointment</i> on page 39.</p> <div data-bbox="459 488 1390 616" style="border: 1px solid #ccc; background-color: #e6f2ff; padding: 5px;"> <p>Note: A service icon may be disabled if the selected staff member has another appointment that would overlap that service's duration.</p> </div>
Assistant	<p>Press an assistant icon to book that staff member for the service.</p> <p>See <i>Editing the staff member for a service</i> on page 47.</p> <div data-bbox="459 804 1390 972" style="border: 1px solid #ccc; background-color: #e6f2ff; padding: 5px;"> <p>Note: Assistant icons may be disabled if that staff member already has an appointment that would overlap the current service's duration.</p> </div>
	<p>Press to mark the currently selected staff member as requested by the customer.</p> <p>See <i>Recording a staff request</i> on page 49.</p>
Time	<p>Select the time the service starts.</p> <div data-bbox="459 1319 1390 1447" style="border: 1px solid #ccc; background-color: #e6f2ff; padding: 5px;"> <p>Note: The start time relates to the service currently selected in the Schedule area, not the entire appointment.</p> </div>
Duration	<p>Select the length of time the staff member is required for the service.</p>
Break	<p>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.</p>

Managing appointments

Schedule area

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

Field	Description
	Press to add another service in the next available timeslot. Note: The service defaults to the selected staff member. You can change this later. See <i>Editing the staff member for a service</i> on page 47.
	Press to remove the selected service. Note: This button is only displayed if more than one service is scheduled.

Field	Description
	<p>The scheduled services. The times on the left indicate the availability of staff during each period:</p>
Colour	Description
Green	The selected staff member is available at this time.
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



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 *Rescheduling an appointment* on page 63. Also see *Duplicating an appointment* on page 60.

Feedback

Press to record customer feedback about this appointment.

See *Recording customer feedback* on page 72.

Arrived

Press to record that the customer has arrived for their first service.

See *Marking a customer as arrived* on page 68.

Completed

Press to record that the appointment is complete.

See *Marking an appointment as completed* 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.

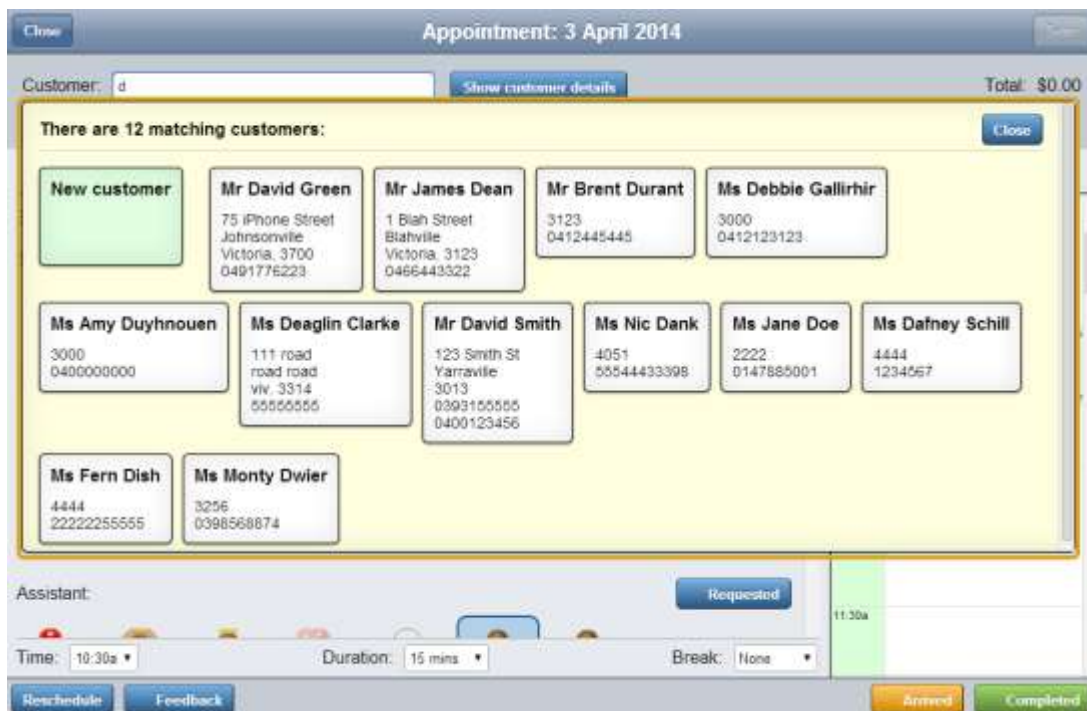


The Customer search screen is displayed.

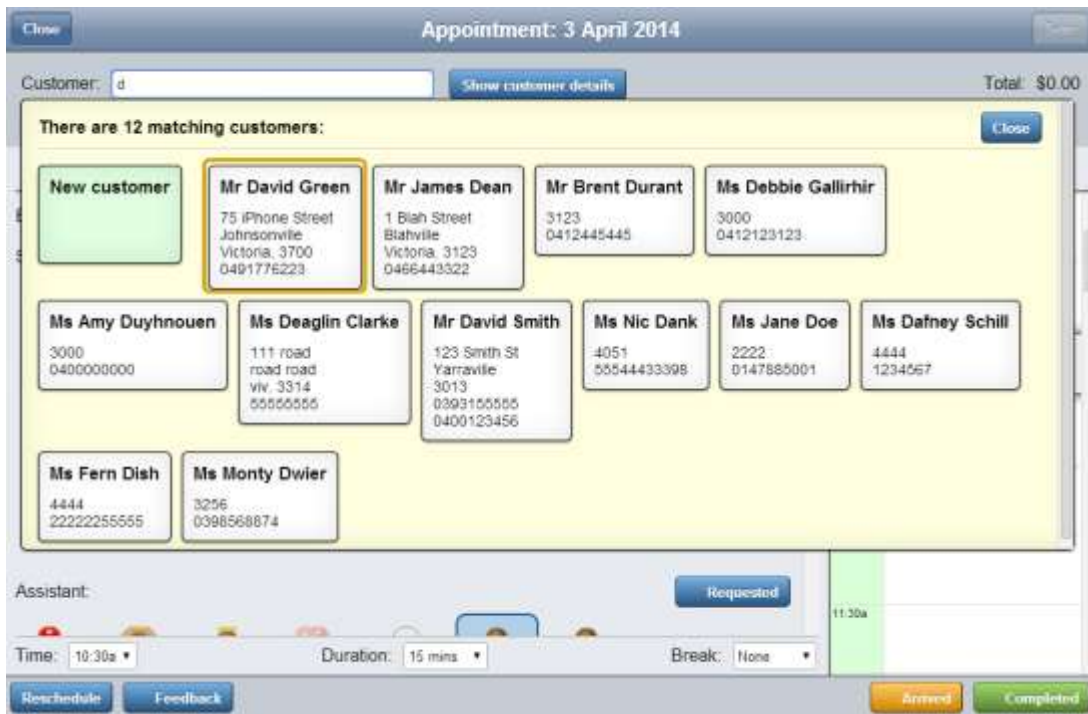
Managing appointments



3. Type the first few letters of the customer's first or last name.
The search results are displayed.



4. Press the customer's name.



5. Press **Show customer details**.



The Customer details screen is displayed.

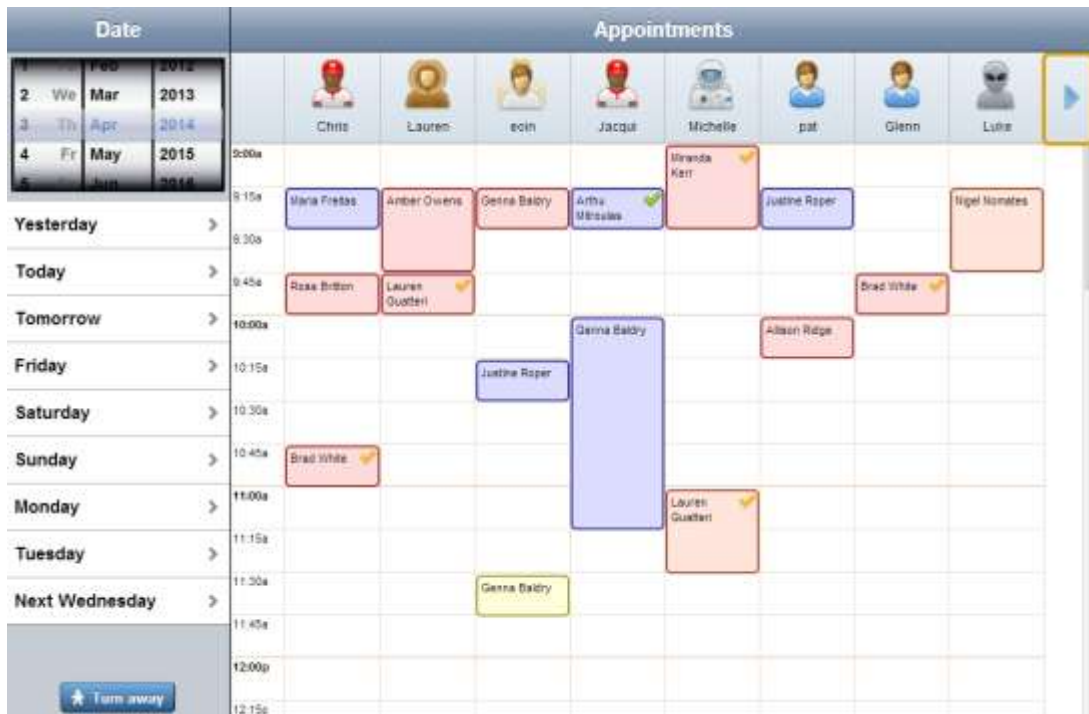
Managing appointments

The screenshot shows a software interface for managing appointments. At the top, it says "Appointment: 3 April 2014". Below that, the customer's name is "David Green" with a "Hide customer details" button. A "Total: \$0.00" is displayed in the top right. A yellow-bordered pop-up window displays the following fields: Title (Mr), First name (David), Last name (Green), Address (75 Phone Street), Suburb (Johnsonville), State (Victoria), Postcode (3700), Phone (0491775223), and Mobile (empty). Below the pop-up, there are service options: Colour Correction, Demi Colour Long, Demi Colour Medium, Demi Colour Short, Demi Colour X Long, Tint Long, Tint Medium, Tint Blends, Tint Regrowth, and Tint Short. A "Notes" field contains "Latte 1 sugar". At the bottom, there are fields for Assistant, Time (10:30a), Duration (15 mins), and Break (None). A "Requested" button is visible. On the right side, there is a calendar view with a "Please select a service" prompt and a "pat" icon. At the bottom right, there are "Arrived" and "Completed" buttons.

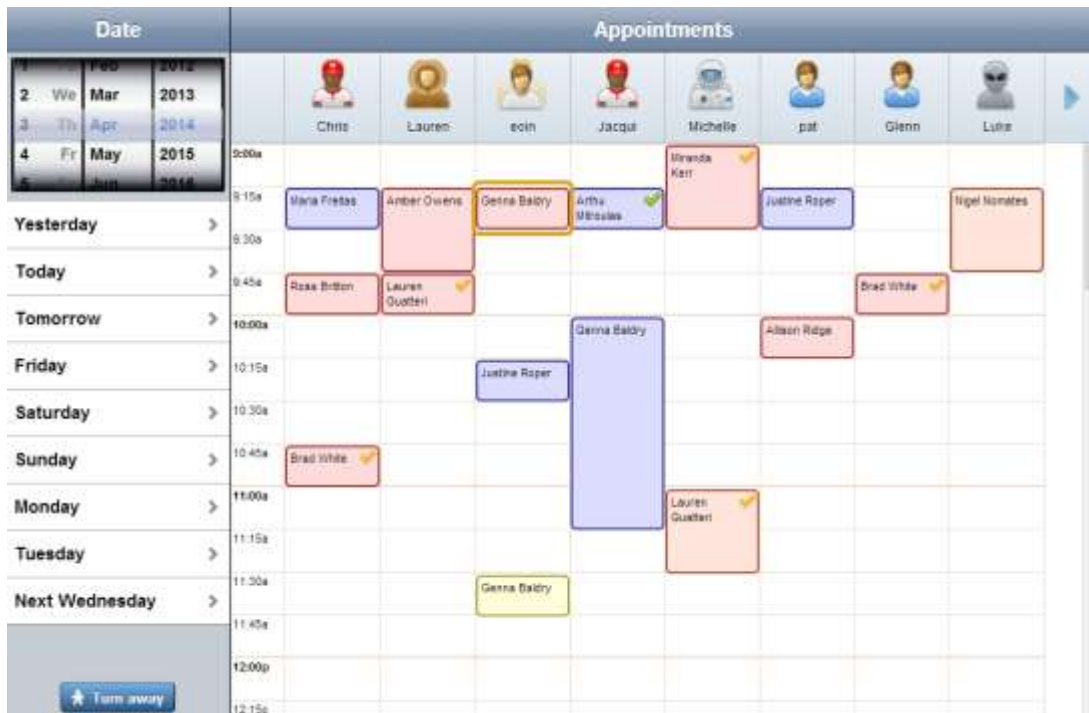
Customer details screen key fields and buttons

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.

Managing appointments



3. Press the appointment to open it.



Creating a new appointment

Create an appointment to 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-the-week selections.



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

The Appointment screen is displayed.

Managing appointments

Appointment: 3 April 2014

Customer: [Show customer details](#) Total \$0.00

Details:

9:15a - 9:30a: (Please select a service) Price: \$0.00 [Add service](#)

Book: SALON Section: Colour

Service:

Colour Correction, Demi Colour Long, Demi Colour Medium, Demi Colour Short, Demi Colour X Long, Tint Long, Tint Medium, Tint Mens, Tint Regrowth, Tint Short

Assistant:

Time: 9:15a Duration: 15 mins Break: None

[Reschedule](#) [Feedback](#) [Arrived](#) [Completed](#)

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.

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.

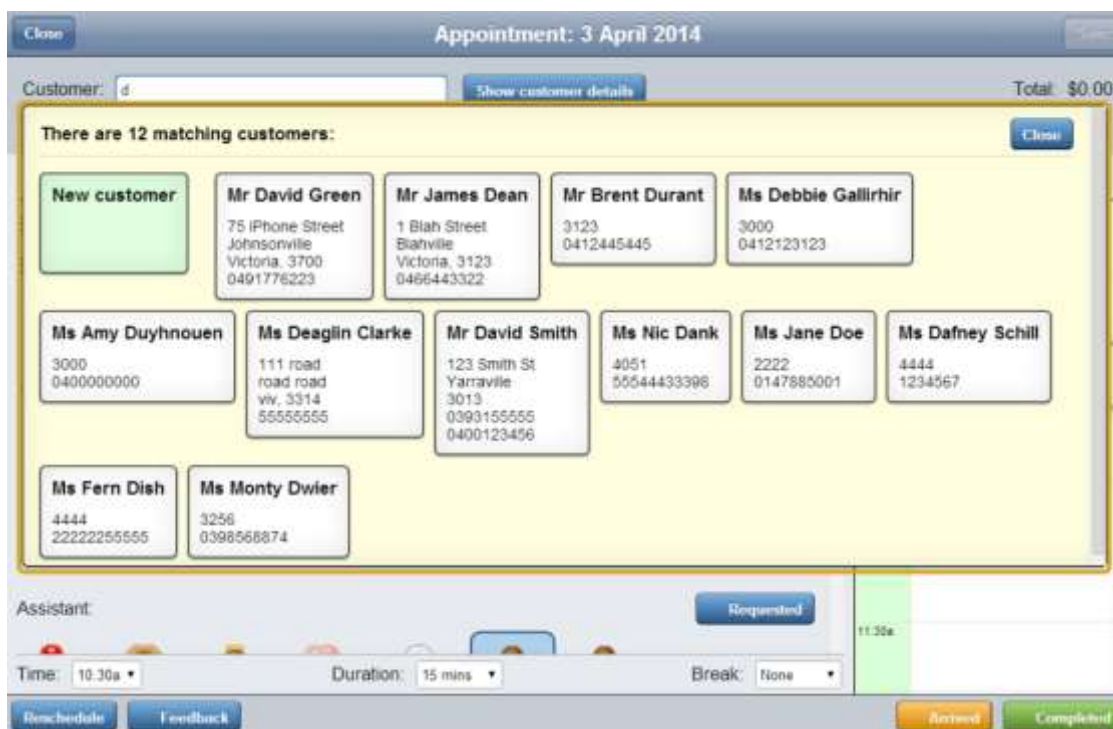


The Customer search screen is displayed.

Managing appointments



3. Type the first few letters of the customer's first or last name.
The search results are displayed.



4. Press the customer's name.

Appointment: 3 April 2014

Customer: d [Show customer details](#) Total: \$0.00

There are 12 matching customers: [Close](#)

New customer	Mr David Green 75 iPhone Street Johnsonville Victoria, 3700 0491776223	Mr James Dean 1 Biah Street Biahville Victoria, 3123 0466443322	Mr Brent Durant 3123 0412445445	Ms Debbie Gallirhir 3000 0412123123	
Ms Amy Duyhnouen 3000 0400000000	Ms Deaglin Clarke 111 road road road vw, 3314 55555555	Mr David Smith 123 Smith St Yarraville 3013 0393155555 0400123456	Ms Nic Dank 4051 55544433396	Ms Jane Doe 2222 0147885001	Ms Dafney Schill 4444 1234567
Ms Fern Dish 4444 22222255555	Ms Monty Dwier 3256 0398566874				

Assistant: [Requested](#)

Time: 10:30a Duration: 15 mins Break: None

[Reschedule](#) [Feedback](#) [Feedback](#) [Completed](#)

11:30a

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.



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



The Customer details screen is displayed.

Managing appointments

Appointment: 3 April 2014

Customer: **Hide customer details** Total: \$0.00

Title: First name: Last name:

Address:

Suburb: State: Postcode:

Phone: Mobile:

Notes:

Colour Correction Demi Colour Long Demi Colour Medium Demi Colour Short Demi Colour X Long Tint Long Tint Medium Tint Mens

Tint Regrowth Tint Short

Assistant: **Requested**

Time: 10:45a Duration: 15 mins Break: None

Reschedule **Feedback** **Add service** **Requested** **Feedback** **Completed**

10:15a
10:30a
10:45a (Please select a service) 
11:00a
11:15a
11:30a
11:45a

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.

2. Press .



The Customer details screen is displayed.

Managing appointments

The screenshot shows a software interface for managing appointments. At the top, it says "Appointment: 3 April 2014". The customer is "David Green" with a total of "\$0.00". A yellow-bordered pop-up window displays the following details:

- Title: Mr
- First name: David
- Last name: Green
- Address: 75 iPhone Street
- Suburb: Johnsonville
- State: Victoria
- Postcode: 3700
- Phone: 0491776223
- Mobile: (empty)
- Notes: Latte 1 sugar

Below the pop-up, there are service selection options: "Colour Correction", "Demi Colour Long", "Demi Colour Medium", "Demi Colour Short", "Demi Colour X Long", "Tint Long", "Tint Medium", "Tint Mens", "Tint Regrowth", and "Tint Short". There are also "Assistant:" and "Requested" buttons. At the bottom, there are fields for "Time: 10:30a", "Duration: 15 mins", and "Break: None". On the right side, there is a vertical grid of time slots from 10:00a to 11:50a. A pop-up message says "(Please select a service)". At the bottom right, there are "Feedback" and "Completed" buttons.

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.

2. Press .



The Customer details screen is displayed.

Managing appointments

The screenshot displays a software interface for managing appointments. At the top, it shows the appointment date: "Appointment: 3 April 2014". Below this, the customer's name is listed as "David Green" with a "Hide customer details" button. A "Total \$0.00" is shown in the top right corner. A yellow-bordered pop-up window is open, containing the following fields: Title (Mr), First name (David), Last name (Green), Address (75 iPhone Street), Suburb (Johnsomille), State (Victoria), Postcode (3700), Phone (0491776223), and Mobile (empty). A "Notes" field contains "Latte 1 sugar". Below the pop-up, there are several service options: "Colour Correction", "Demi Colour Long", "Demi Colour Medium", "Demi Colour Short", "Demi Colour X Long", "Tint Long", "Tint Medium", "Tint Mens", "Tint Regrowth", and "Tint Short". An "Assistant" field is also present. At the bottom, there are buttons for "Reschedule", "Feedback", "Requested", "Add service", "Feedback", and "Completed". The interface also shows a time slot grid on the right side, with a "Please select a service" prompt over the 10:30a slot.

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.



2. Press the **Details** field.

Managing appointments

Appointment: 3 April 2014

Customer: Genna Baldry Show customer details Total: \$69.00

Details:

9:15a - 10:00a: Demi Colour Medium Price: \$45.00 Add service Remove service

Book: SALON Section: Colour

Service:

Colour Correction Demi Colour Long **Demi Colour Medium** Demi Colour Short Demi Colour X Long Tint Long Tint Medium Tint Mens

Tint Regrowth Tint Short

Assistant: Requested

Time: 9:15a Duration: 15 mins Break: 30 mins

Cancel appointment Reschedule Feedback Arrived Completed

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.



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  to add a service in the next available time-slot.

Managing appointments



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.



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

The available services within that Book and Section are displayed.



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

4. Press the service you want to add.



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

Managing appointments

Close Appointment: 3 April 2014 Save

Customer: Genna Baldry Show customer details Total: \$79.00

Details: []

11:30a - 11:45a: French Polish Price: \$10.00 Add service Remove service

Book: Nails

Assistant:

Requested

Chris Lauren eoin Jacqui Michèle pat Glenn



Luis Bob Matt Justine Caroline Michael Jen

Leigh Julie Alison Margot stork festpoo 2222

Time: 11:30a Duration: 15 mins Break: None

Cancel appointment Reschedule Feedback Request Completed

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.

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

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.



2. Press the service you want to edit in the Schedule area of the Appointment screen.

The service is highlighted.

Managing appointments

The screenshot shows the appointment management interface for an appointment on 3 April 2014. The customer is Genna Baldry, and the total price is \$69.00. The current service is 'Demi Colour Medium' for \$45.00, scheduled from 9:15a to 10:00a. The interface includes a 'Service' section with various options like 'Colour Correction', 'Demi Colour Long', 'Demi Colour Medium', 'Demi Colour Short', 'Demi Colour X Long', 'Tint Long', 'Tint Medium', 'Tint Mens', 'Tint Regrowth', and 'Tint Short'. The 'Demi Colour Medium' service is currently selected. The 'Assistant' field is empty, and the 'Requested' button is visible. The 'Time' is set to 9:15a, 'Duration' is 15 mins, and 'Break' is 30 mins. The 'Cancel appointment', 'Reschedule', and 'Feedback' buttons are at the bottom left, and 'Arrived' and 'Completed' buttons are at the bottom right.

3. Press the service you want to switch to.

The screenshot shows the appointment management interface for the same appointment on 3 April 2014. The customer is Genna Baldry, and the total price is now \$34.00. The current service is 'Tint Regrowth' for \$10.00, scheduled from 9:15a to 10:15a. The 'Tint Regrowth' service is now selected in the 'Service' section. The 'Assistant' field is empty, and the 'Requested' button is visible. The 'Time' is set to 9:15a, 'Duration' is 15 mins, and 'Break' is 45 mins. The 'Cancel appointment', 'Reschedule', and 'Feedback' buttons are at the bottom left, and 'Arrived' and 'Completed' buttons are at the bottom right.

4. Press .

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.



2. Press the service you want to edit in the Schedule area of the Appointment screen.

The service is highlighted.

Managing appointments

The screenshot shows the 'Appointment: 3 April 2014' interface. At the top, there are 'Close' and 'Save' buttons. The customer name is 'Genna Baldry' with a 'Show customer details' button. The total price is '\$69.00'. The current appointment is for '9:15a - 10:00a: Demi Colour Medium' with a price of '\$45.00'. Below this, there are dropdowns for 'Book: SALON' and 'Section: Colour'. The 'Service:' section displays a grid of service options, each with a red diamond icon: 'Colour Correction', 'Demi Colour Long', 'Demi Colour Medium' (highlighted with a blue border), 'Demi Colour Short', 'Demi Colour X Long', 'Tint Long', 'Tint Medium', 'Tint Mens', 'Tint Regrowth', and 'Tint Short'. An 'Assistant:' field is empty, and a 'Requested' button is visible. At the bottom, there are fields for 'Time: 9:15a', 'Duration: 15 mins', and 'Break: 30 mins'. A row of buttons includes 'Cancel appointment', 'Reschedule', 'Feedback', 'Arrived', and 'Completed'.

3. Press the **Time** field.

This screenshot is identical to the previous one, but the 'Time: 9:15a' dropdown menu is highlighted with a yellow border, indicating it is the active field.

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.



2. Press the service you want to edit in the Schedule area of the Appointment screen.

The service is highlighted.

Managing appointments



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



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

4. Press .

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.



2. Press the service you want to edit in the Schedule area of the Appointment screen.

The service is highlighted.

Managing appointments



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



4. Press **Requested**.



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.



2. Press the service you want to edit in the Schedule area of the Appointment screen.

The service is highlighted.



3. Press the **Price** field.



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.



2. Press the service you want to edit in the Schedule area of the Appointment screen.

The service is highlighted.



3. Press the **Duration** field.



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.

The Appointment screen is displayed.



2. Press the service you want to edit in the Schedule area of the Appointment screen.

The service is highlighted.



3. Press the **Break** field.



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.



2. Press the service you want to edit in the Schedule area of the Appointment screen.

The service is highlighted.



3. Press **Remove service**.



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.



2. Press .

The Reschedule appointment screen is displayed.



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.



Managing appointments

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 .

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.



2. Press **Reschedule**.

The Reschedule appointment screen is displayed.

Managing appointments



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.



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 .

The appointment is rescheduled.

Canceling 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.

The Appointment screen is displayed.



2. Press





The Confirmation screen is displayed.



3. Press .

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.



2. Press .

Appointment: 3 April 2014

Customer: Genna Baldry Show customer details Total: \$69.00

Details:

10:00a - 11:15a: Ladies Shp/cut/bw Price: \$24.00 Add service Remove service

Book: SALON Section: CUTS

Assistant: Requested

Staff: Chris, Lauren, eoin, Jacqui, Michelle, pat, Glenn, Luke, Bob, Matt, Justine, Caroline, Michael, Jen, Leigh, Julie, Alison, Margot, stock1, testpos, 2222

Time: 10:00a Duration: 1 1/4 hours Break: None

Cancel appointment Reschedule Feedback Arrived Completed

The customer is marked as arrived.

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

Date	Appointments							
	Chris	Lauren	eoin	Jacqui	Michelle	pat	Glenn	Luke
1 Feb 2012								
2 We Mar 2013								
3 Th Apr 2014								
4 Fr May 2015								
Yesterday								
Today								
Tomorrow								
Wednesday								
Thursday								
Friday								
Saturday								
Sunday								
Next Monday								

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.

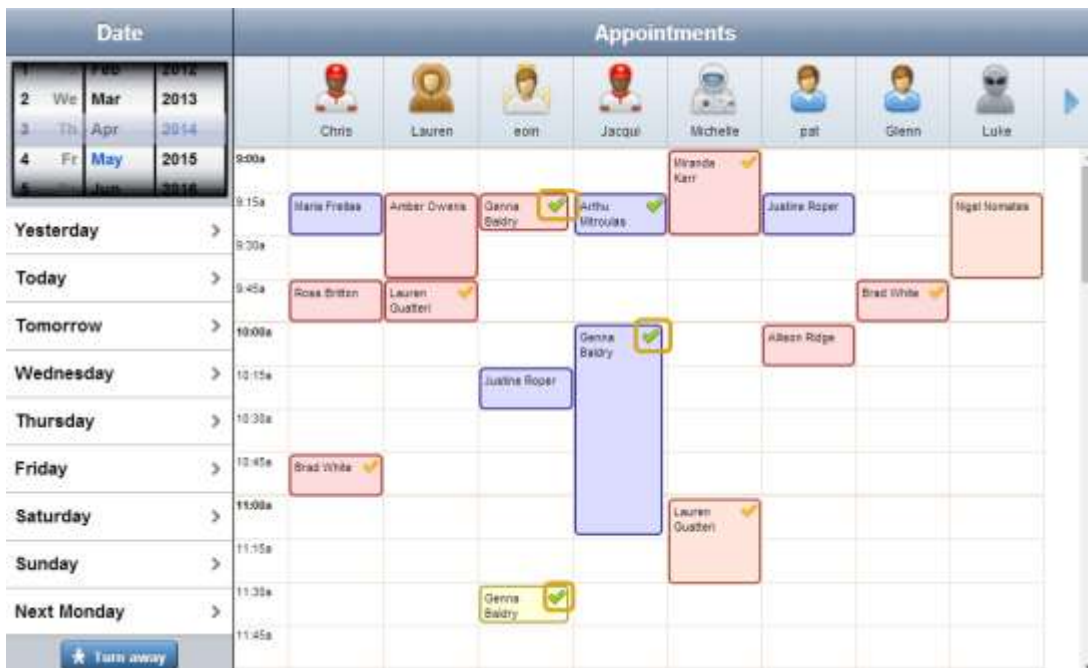


2. Press .



The appointment is marked as completed.

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



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.




2. Press .



3. The Feedback screen is displayed.



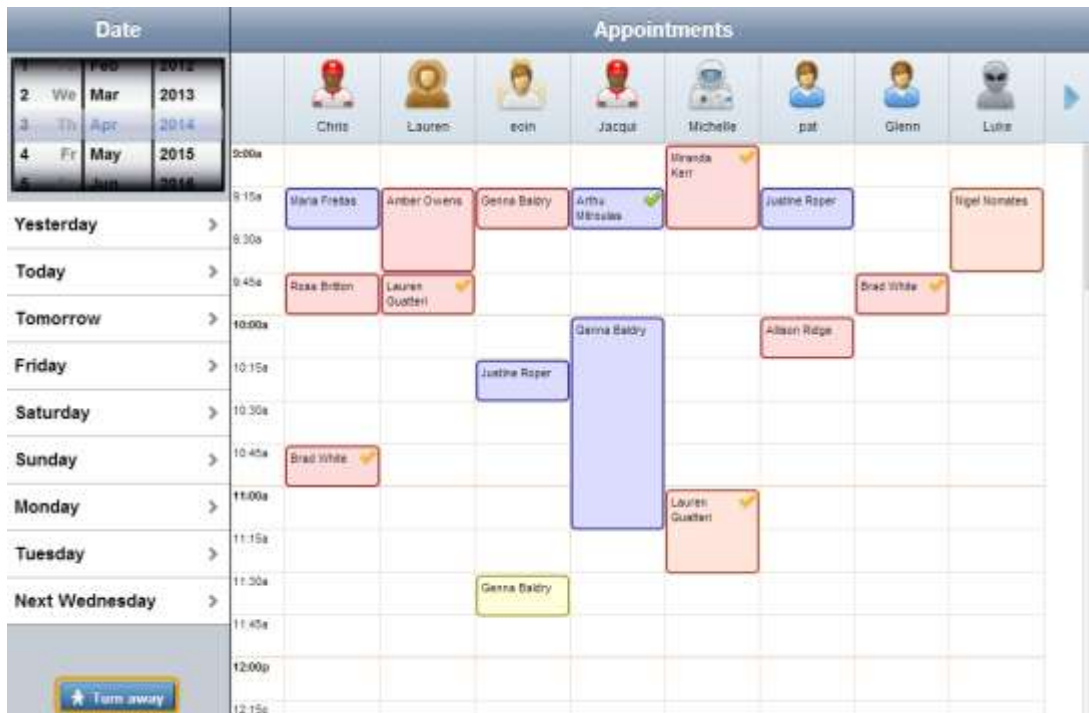
4. Type the customer's feedback and press . The feedback is recorded.

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  on the Schedule screen.



2. The Turn away customer screen is displayed.

The screenshot displays a scheduling application with a calendar view. The top left shows a date selector for March 2013. The main area is a grid where columns represent staff members (Chris, Lauren, eoin, Jacqui, Michelle, .pat, Glenn, Luke) and rows represent time slots. Appointments are shown as colored blocks with names like 'Maria Fiebas', 'Amber Owens', 'Gemma Balby', etc. A dialog box titled 'Turn away customer' is overlaid on the calendar, containing dropdown menus for 'Book' (set to SALON) and 'Section' (set to Highlights), a text input field for 'Reason', and 'Close' and 'Send' buttons.

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 .

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 dyeing 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 dyeing 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.

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