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Help

I. Calendar

I.i. Selecting a date

Click on the green down arrow on the right hand side of the screen



Click once on the required date to display the calendar for that date.

Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mo
		1	2	3	4		
6	7	8	9	10	11	2	3
13	14	15	16	17	18	9	10

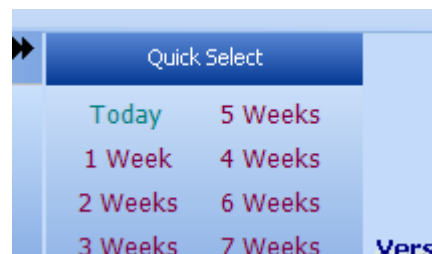
I.ii. Displaying days

The “Days to show” option lets you choose the number of days to appear (to move from day to day, use the scroll bar at the bottom of the screen).



I.iii. Moving forward in weeks

Use the options in the “Quick Select” panel to move forward in weeks.



I.iv. Moving forward in months

Use the single arrows in the calendar window to display the month at the top of the calendar.



Dec 2008						▶▶	Q
Tue	Wed	Thu	Fri	Sat			
2	3	4	5	6		Today	
9	10	11	12	13		1 Week	

I.v. Moving forward in years

Use the double arrows in the calendar window to display the year at the top of the calendar.



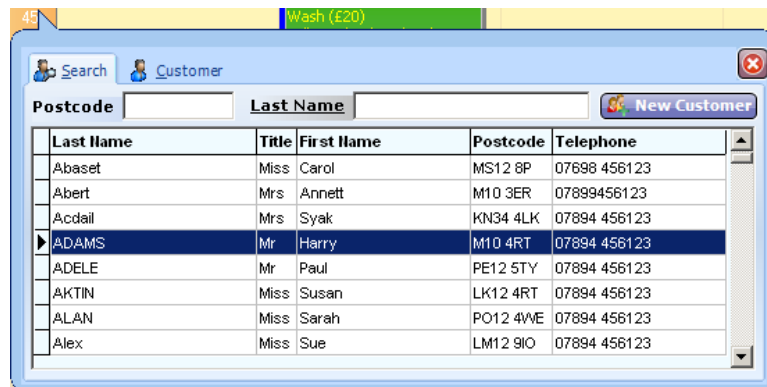
Dec 2008							▶▶	Q
Sun	Mon	Tue	Wed	Thu	Fri	Sat		
	1	2	3	4	5	6	Today	
7	8	9	10	11	12	13	1 Week	
14	15	16	17	18	19	20		

2. Appointments

2.i. Making an appointment

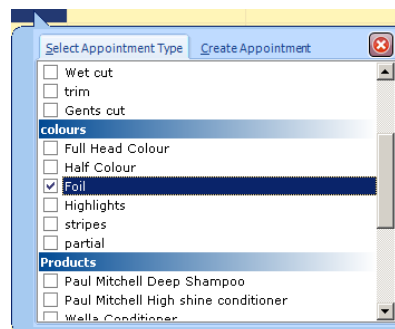


Double click on the required timeslot to display a list of your customers.

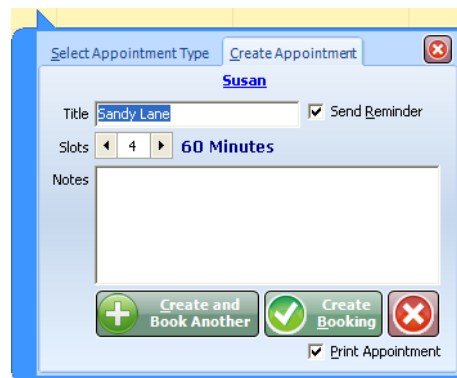


Double click on the customer's name.

In the “Select Appointment Type” screen tick the services or products required.

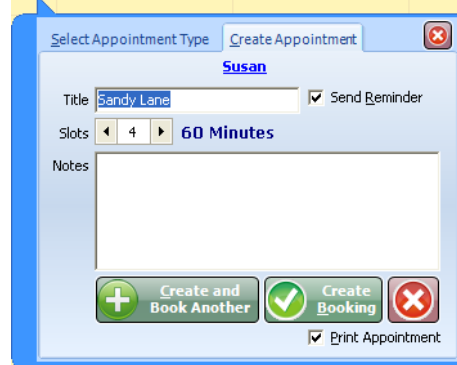


To complete the appointment click on the Create Appointment tab, and type in any notes about the appointment, add any notes and click on the green “Create booking” button.



The screenshot shows a software window titled "Create Appointment" for a client named "Susan". The window has a tab labeled "Create Appointment" and a close button. The "Title" field contains "Sandy Lane" and the "Send Reminder" checkbox is checked. The "Slots" field shows "4" and "60 Minutes". There is a large empty "Notes" text area. At the bottom, there are three buttons: "Create and Book Another" (with a green plus icon), "Create Booking" (with a green checkmark icon), and a red "X" button. A "Print Appointment" checkbox is also checked.

If the client requires another treatment click on the “create and book another” button and select the next timeslot and treatment.



This screenshot is identical to the one above, but the "Create and Book Another" button (with the green plus icon) is highlighted, indicating it is the active button.

2.ii. Sending a text reminder

In the “Create Appointment” screen tick the “Send Reminder” box.

2.iii Changing an appointment

To move an appointment to another timeslot on the same day, click on the appointment and drag it to the new timeslot.

2.iv. Deleting an appointment

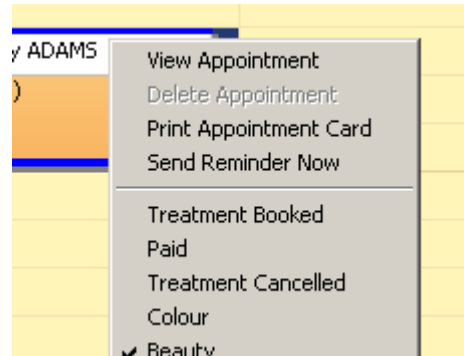
Right click on the appointment and select “Delete Appointment”.

2.v. Viewing an appointment

To view an appointment either double click on the top bar of the appointment or right click on the appointment and select “View Appointment”.

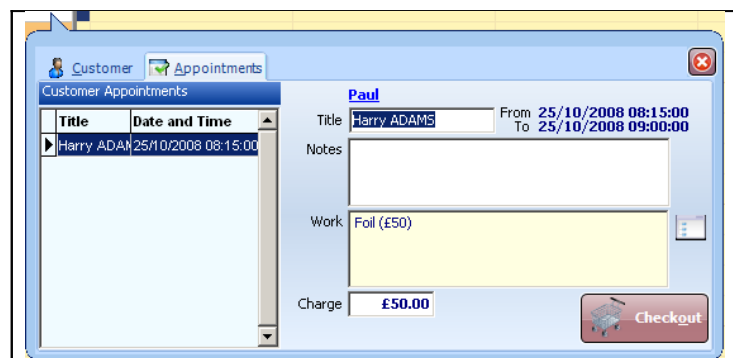
2.vi. Changing the status of an appointment

Right click on the appointment and select the status from the list displayed.

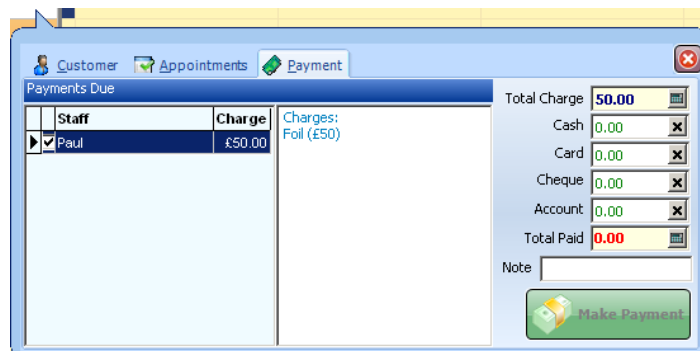


2 vii Taking a payment.

Double click on the appointment and click on the checkout button,

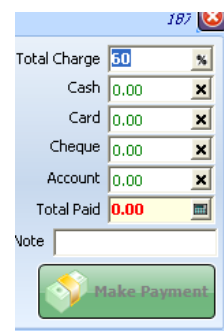


all outstanding payments due will be displayed on the left of the page. Select the payment method by selecting the cross on the appropriate window.

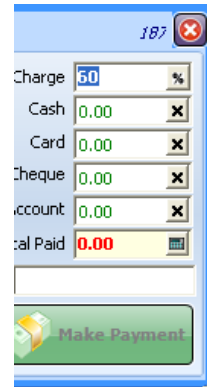


viii Splitting payment

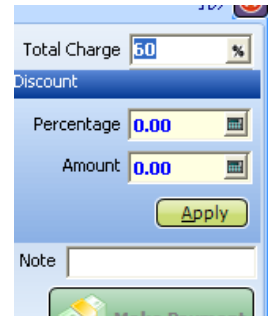
If your client wishes to pay buy more than one payment method, type the amount to pay in each payment window. When the payments equal the total charge the make payment button will become available.



Discounting payments click on the percentage button on the right hand side of the “charge window”

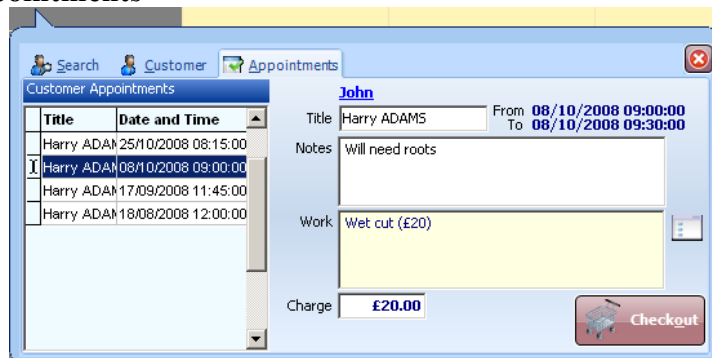


Enter either the amount of discount or the percentage and click on the apply and the amount will be discounted from the total



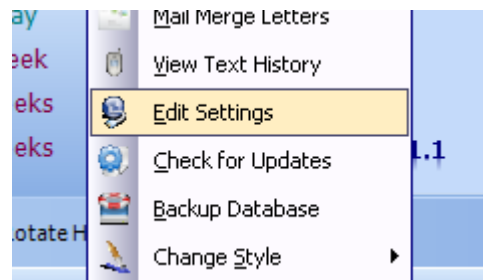
2 iv Viewing previous appointments

If you need to view a previous treatment, double click on the appointment and select the previous appointment from the list. The details of the appointment will be displayed in the right hand window.



3. Staff

To use the management functions, click on "Manage System" in the top right corner. Enter your password in the box that appears. You can now access the management functions.



3.i. Staff management functions

Click on “Manage System”, select “Edit Settings” and then select the “Staff” tab.

Staff Name	Main Telephone	Mon	Tues	Wed	Thur	Fri	Sat	Sun	Active Tick	Staff ID
John	07904014746	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Paul	07896 65432	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Steven	07904014751	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Susan	07841051924	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Trayce	07894566122	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Vicky	07904014747	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	

3.ii. Adding new staff

In the “Staff” screen toolbar click on “+”. A new line will appear in the “Staff Name” column. Type in the person’s name and click on “√” in the toolbar to confirm. To display the new name on the calendar, restart the program.

Main Telephone	Mon	Tues	Wed	Thur	Fri	Sat	Sun	Active Tick	Staff ID
*	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	0
07904014746	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	2
07896 65432	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	1
07904014751	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	5
07841051924	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	4

3 iii Adding staff details

Double click on the name and enter details in the relevant boxes.

3.iv. Removing Staff

In the “Staff” screen highlight the person’s name and click on “” in the toolbar. A “Delete record?” box will prompt you to confirm the deletion.

Main Telephone	Mon	Tu
07904014746	<input checked="" type="checkbox"/>	
07896 65432	<input checked="" type="checkbox"/>	

3.v. Staff working days

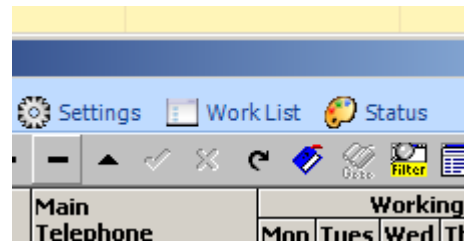
In the “Staff” screen highlight the person’s name and tick the days to be worked

Name	Working Days							Avail
	Mon	Tues	Wed	Thur	Fri	Sat	Sun	
746	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
432	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
751	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	

4. Products & Services

4.i. Work List screen

Click on “Manage System”, select “Edit Settings” and then select the “Work List” tab.



4.ii. Entering a product or treatment group

The screenshot shows the 'Appointment Settings' window with the 'Work List' tab selected. The table below lists various product groups with their codes, descriptions, prices, and other attributes.

Work Code	Work Description	Item Price	Grp Item	Time Slots	Comm %	Nominal/GL Code
*		£0.00	<input type="checkbox"/>	1	0	
200	Cuts	£0.00	<input checked="" type="checkbox"/>	1	20	
201	Dry Cut	£10.00	<input type="checkbox"/>	2	20	
202	Wash	£20.00	<input type="checkbox"/>	1	20	
203	childs cut	£10.00	<input type="checkbox"/>	2	20	
204	Cut and Restyle	£30.00	<input type="checkbox"/>	3	20	
205	Wash and Blow dry	£20.00	<input type="checkbox"/>	4	20	
206	cut with vicky	£30.00	<input type="checkbox"/>	2	20	
207	Wet cut	£20.00	<input type="checkbox"/>	2	20	

In the “Work List” screen toolbar click on “+” and enter a number (for example 100) in the “Work Code” column and enter the product group in the “Work Description” column. Leave the “Item Price” column blank and tick the “Grp Item” box. The next product group would start with the number 200, and so on, leaving enough room for 99 items in each group. When you have entered the product group click on “√” in the toolbar to save it.

4.iii. Entering a Treatment

Work Code	Work Description	Item Price	Grp Item	Time Slots	Comm %	Nominal/GL Code
200	Cuts	£0.00	<input checked="" type="checkbox"/>	1	20	
201	Dry Cut	£10.00	<input type="checkbox"/>	2	20	
202	Wash	£20.00	<input type="checkbox"/>	1	20	
203	childs cut	£10.00	<input type="checkbox"/>	2	20	
204	Cut and Restyle	£30.00	<input type="checkbox"/>	3	20	
205	Wash and Blow dry	£20.00	<input type="checkbox"/>	4	20	
206	cut with vicky	£30.00	<input type="checkbox"/>	2	20	
207	Wet cut	£20.00	<input type="checkbox"/>	2	20	
*		£0.00	<input type="checkbox"/>	1	0	

In the “Work List” screen toolbar click on “+” and enter the next number following the last entry in that product group. Type the treatment description in the “Work Description” column the price in the “Item Price” column, the number time slots for the treatment in the “Time Slots” column and the commission paid on item in the “Comm%” column, leaving the “Grp Item” box blank. When you have entered the treatment click on “√” in the toolbar to save it.

4.iv. Entering a Product

Work Code	Work Description	Item Price	Grp Item	Time Slots	Comm %	Nominal/GL Code
230	stripes	£20.00	<input type="checkbox"/>	4	20	
231	partial	£30.00	<input type="checkbox"/>	3	20	
250	Products	£0.00	<input checked="" type="checkbox"/>	1	0	
251	Paul Mitchell Deep Shampoo	£50.00	<input type="checkbox"/>	0	50	
252	Paul Mitchell High shine conditioner	£60.00	<input type="checkbox"/>	0	50	
253	Wella Conditioner	£70.00	<input type="checkbox"/>	0	50	
254	Wella Shampoo	£80.00	<input type="checkbox"/>	0	50	
255	gel	£5.00	<input type="checkbox"/>	0	50	
* 256		£0.00	<input type="checkbox"/>	0	0	

In the “Work List” screen toolbar click on “+” and enter the next number following the last entry in that product group. Type the product description in the “Work Description” column and the price in the “Item Price” column, and the commission paid on item in the Comm% column, leaving the “time slot” and “Grp Item” boxes blank, When you have entered the product click on “√” in the toolbar to save it.

4.v. Deleting a Product

In the “Work List” screen highlight the product you want to delete and click on X on the toolbar. A “Delete record?” box will prompt you to confirm the deletion.

4.vi. Deleting a Treatment

In the “Work List” screen highlight the treatment you want to delete and click on X on the toolbar. A “Delete record?” box will prompt you to confirm the deletion.

5. SMS Reminders

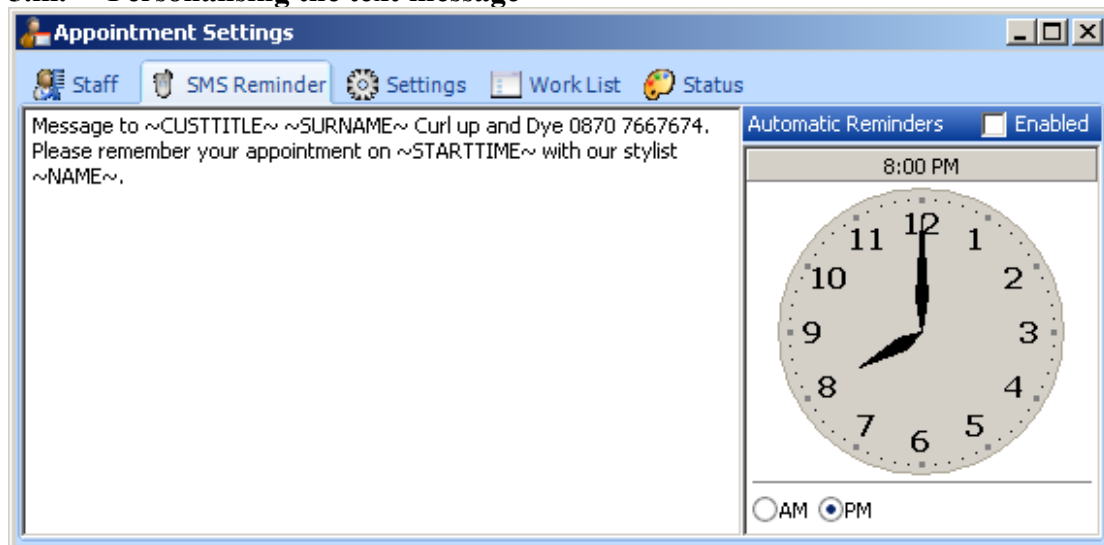
5.i. SMS reminder screen

Click on “Manage System”, select “Edit Settings” and then select the “SMS Reminder” tab.

5.ii. Activating automatic reminders

In the “SMS Reminder” screen tick the “Automatic Reminders Enabled” box above the clock

5.iii. Personalising the text message



In the “SMS Reminder” screen type your message between the “~” symbols.

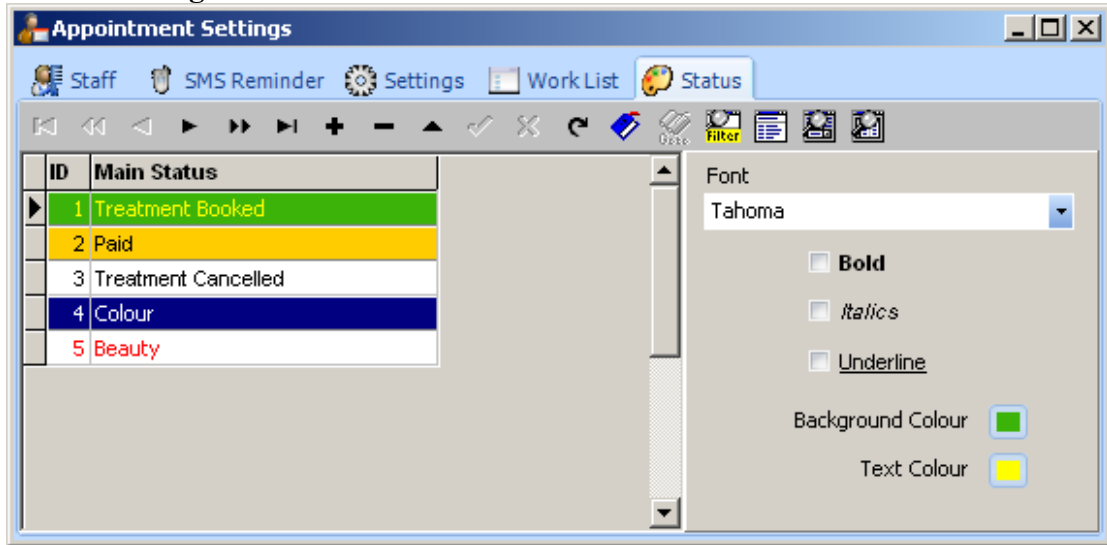
5.iv. Changing the time of SMS reminders

To move the hands of the clock click on the clock face numbers. Big hand = right click, small hand = left click. Click on the AM or PM button. The time you have entered will appear above the clock.

6. Appointment Status

Click on “Manage System”, select “Edit Settings” and then select the “Status” tab.

6.i. Adding a status

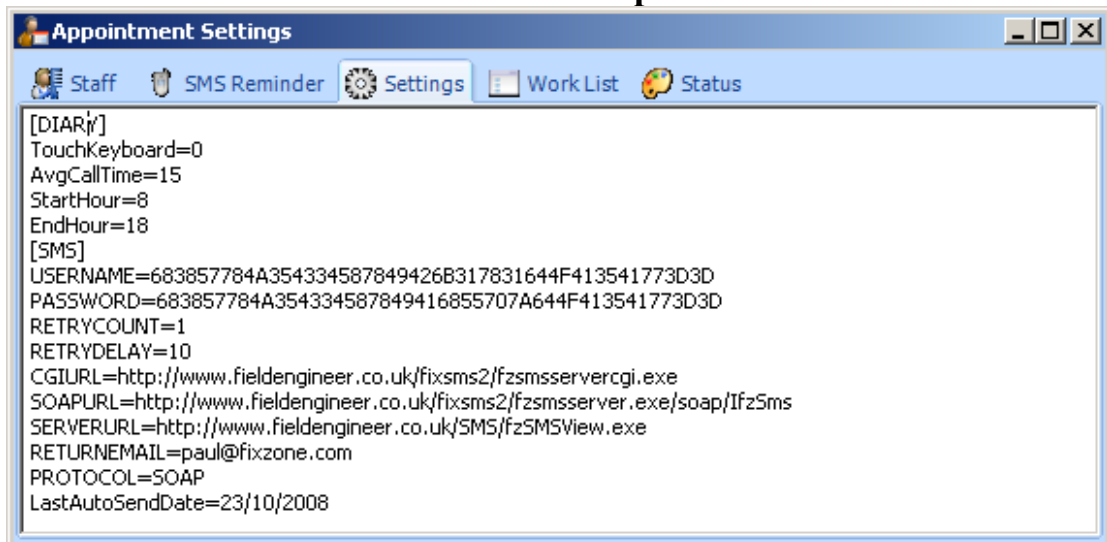


In the “Status” screen toolbar click on “+” and type in a status description. When you have done this click on “√” in the toolbar to save it.

6.ii. Changing fonts and colours

In the “Status” screen select the status and on the right hand side of the screen select the font and colours you require. When you have done this click on “√” in the toolbar to save it.

7. Advanced Options



7.i. Changing the “Manage System” password

Click on “Manage System”, select “Edit Settings” and then select the “Settings” tab. Edit the line Password=password. (The default password is “password”).

7.ii. Changing the company name

Click on “Manage System”, select “Edit Settings” and then select the “Settings” tab. Edit the line CompanyName=Your Company Name. (The default CompanyName is “Your Company Name”).

7.iii. Changing timeslot increments

Click on “Manage System”, select “Edit Settings” and then select the “Settings” tab.. Edit the line AvgCallTime=15 by changing the default number 15 to the timeslot increment you require.

7.iv. Changing the start and end time of the working day

Click on “Manage System”, select “Edit Settings” and then select the “Settings” tab. Edit the lines StartHour=8 and EndHour=18 by changing the default numbers 8 and 18 to the start and end numbers you require.