# Appointments

Appointments: Calendar Window

Purpose

The Appointment Calendar window is the automated equivalent of a paper appointment book. You can make appointments, confirm appointments, and view appointments from the Appointment Calendar window. Using the automated appointment book opens up a world of possibilities for tracking and booking appointments. By storing appointment information you will be able to track how long in advance appointments are booked, who shows up on time, who is late and how many appointments are booked during each portion of the day.

STX gives you a way to open up appointment booking to customers over the Internet with our secure Online Services subscription. Your customers will be able to book their own appointments based on the controls you set up. The Online Booking feature syncs with your local STX database, so there is no fear that someone is taking a peek into your data. Because of this synching, there is no longer a need to take regular backups, or make those time consuming confirmation calls. ALL appointments for clients with valid email addresses will receive an automatic Appointment Reminder email, regardless of how the appointment was booked, whether online or locally with your receptionist.

Controls

Use the side calendar to choose the day, week or month of days to display the associated Appointment Calendar window.
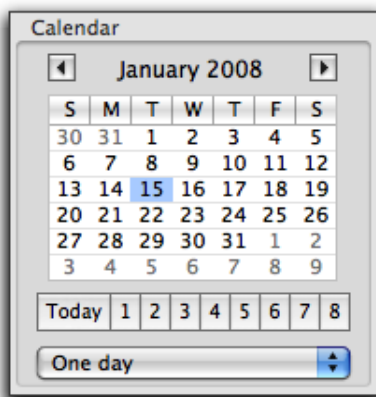

Click a *week* button (1-8) to move the calendar ahead that number of weeks and click the **Today** button to return to today.

One day displays the *One Day* booking view.

One week displays the *One Week* booking view. This view will display an entire week for one particular employee only.

One weekday displays the *One Weekday* booking view. This view will display all of the selected weekdays (ie: Wednesdays) for the month and is for one particular employee only.
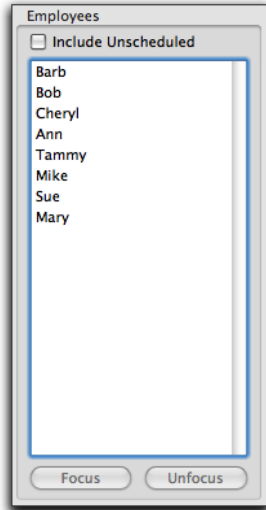
Only the employees scheduled to work for the date highlighted on the side calendar will appear in the list of Employees.

To see all employees, scheduled or not, click the box **Include Unscheduled**. Highlight an employee from the Employees list to choose the employee for the *One Week* or *One Weekday* views.

Use the **Focus** and **Unfocus** buttons to display a single employee, or multiple employees while viewing a particular day on the Calendar.

To select multiple employees, hold the Apple (command) key and highlight each employee you wish to *Focus* on. Then click the **Focus** button. To show all employees again, click the **Unfocus** button.
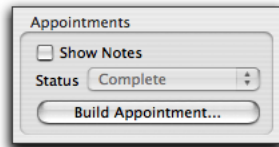
Show Notes, when checked, will show the appointment notes on the appointment itself. If the service booked isn't very lengthy in time, the note may be hidden from view.

However, the note will always appear, along with details of the appointment, when the mouse cursor is moved on top of any appointment.

Status shows the current status of the appointment you have highlighted on the appointment calendar. You can change the status of the appointment using the popup menu.

**Build Appointment** Opens the *Appointment Builder* booking screen.
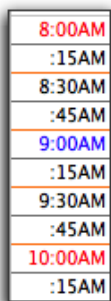
The times and row lines are color coded, which makes it easier to follow the time across the columns. The times are automatically defaulted to every 15 minutes. You can customize this by going to *Setup: General: Company Info.*
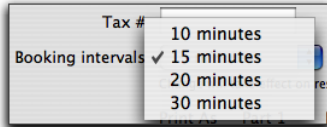
You have choices of 10 minutes, 15 minutes, 20 minutes, and 30 minutes for the **Booking intervals**.

Set the **Booking intervals** pop-up menu to the appropriate length of time you wish to show on the Appointment Calendar window. You must quit and restart STX for the changes to take effect.
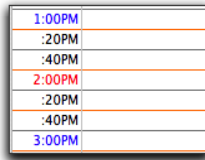
Changing the **Booking intervals** to something like 20 minutes will change the way the times on the appointment calendar appear.

Regardless of what the **Booking Intervals** is set to, your service times must be divisible by that length of time. For instance, you do not want to have a service time interval set for 45 minutes if your Booking Intervals are set to 20 minutes, because that leaves 5 minutes leftover. The Appointment Calendar window will "push" that extra 5 minutes into the next time slot, making the service "appear" to be booked for 60 minutes.
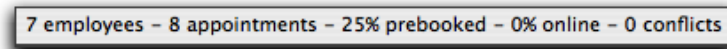
The statistics for the appointments on any given day and view option will show at the bottom of the appointment calendar.

 # employees shows how many employees are being viewed on the appointment calendar for the view you have currently chosen.

 # appointments shows how many appointments are on the appointment calendar for the view you have currently chosen.

% prebooked indicates what percentage of the appointments on the current view were prebooked appointments. This also includes any standing appointments previously booked.

% online indicates what percentage of the appointments on the current view were booked online.

 # conflicts indicates the number of conflicting appointments on the current view. Mostly, this would be conflicts between standing appointments booked on top of appointments that already existed when the standing was created.

Calendar Resizing Controls

Found in the upper right hand corner, this allows you to change the width of each column on the appointment calendar window. The pictures, text, and appointments will auto-adjust themselves to fit within the adjusted width. When the column width has been adjusted, and the booking calendar window is closed, STX will remember what the column widths were set to. The width settings will be remembered regardless of which view you are using on the booking calendar – All Employees One Day, One Employee One Week, or One Employee One Weekday.
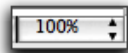

Found in the lower right hand corner, this allows you to change the scale of the appointment calendar window. Reducing the percentage makes the appointment calendar smaller so you can view more employee columns and rows of time. When the booking calendar is closed, STX will NOT remember the scale adjustment, and will open to the 100% view.

Calendar Color Controls

The starting times and ending times showing on the appointment calendar are based on *Company* and *Employee* hours. You might see 3 different colored blocks of time on any given day.
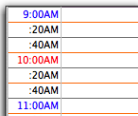
White blocks indicate times available for booking employees. This means both the *Company* and *Employee* are "open" for business.
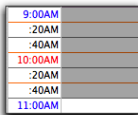
Gray blocks indicate times when the *Employee* is not scheduled to take appointments, but the *Company* is open for business. These blocks are not available for booking appointments through the **Appointment Builder**.
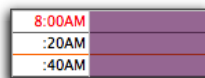
Purple blocks indicate there is an *Employee* whose hours are set to either start <u>before</u> or end <u>after</u> what the *Company* hours are set to. These blocks are not available for booking appointments through the **Appointment Builder**.
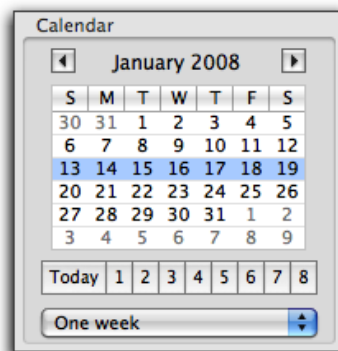
One Day View

The **One Day** view allows you to view a single day for all employees, whether scheduled to work that day or not. The employee's picture shows at the top of the column, and comes from the employee's setup record. This feature is turned on / off in the *STX Preferences* window. The number of *Associates* assigned to an employee is shown under the employee name.

One Week View

Double-click on an employee name, from the top of the employee's appointment column, to open the **One Week** view for that employee.

The **One Week** view allows you to view a complete week for the selected employee.

To view a different week, use the side *Calendar* to highlight the desired week to view the selected employee's week.

Double-click on a day of the week, from the top of the appointment column, to open the **One Weekday** view for the employee.
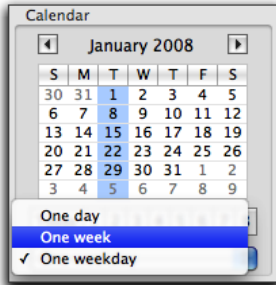
To go back to the **One Week** view, change the *One Weekday* popup menu to **One Week**.
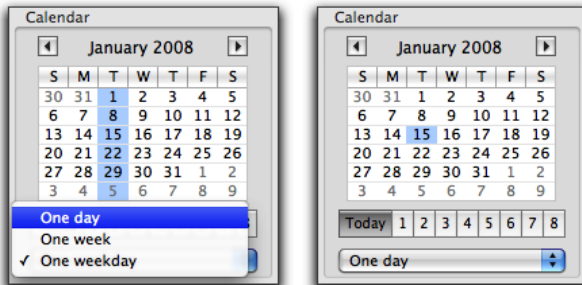
To go back to the **One Day** view, change the popup menu to **One Day** and click the **Today** button to go back to *Today*.

One Weekday View

The **One Weekday** view allows you to view 6 weeks of one day of the week for the selected employee. The 6 weeks are from the currently selected month on the calendar. Double-click on any date, from the top of the appointment column, to open the **One Day** view for that one day. This will bring you back to the *All Employee* view for **One Day**.

Appearance of Appointments

STX uses color and highlighting on each appointment to give you, the user, specific information about each appointment. Because STX considers all services for a client to be part of a single appointment, and not multiple appointments for one client, all services a client is booked for will follow the same color coding. Note: You can set the STX Appointment Preferences to keep each service booked for one client as separate appointments. This, in turn, will allow each to follow separate color codes.

• Color the Client Name is printed in, indicates the **Client Visit Type**. The color of each **Client Visit Type** is defined during setup.
• Border and background color of the appointment indicates the **Status** of the appointment. The **Status** color cannot be changed.
• Length of the **Employee Bar** at the left edge of the appointment indicates the length of time the actual employee is booked to perform the service. (No bar, or a purple bar, indicates the time is open for another service to be booked.)
• Color of the **Employee Bar** at the left edge of the appointment indicates whether or not the actual employee is booked to perform the service. The bar is orange when the employee is booked to perform that portion of the service and purple when an associate is booked to perform that portion of the service. No bar indicates the time is open for another service to be booked.
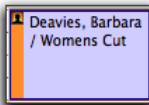
Black text for **Regular Request** visit type. Blue color for the **Booked** status. Employee is booked for the entire appointment time.

Blue text for **Salon Client** visit type. Yellow color for **Called** status. Employee is booked for the first and last sections of the appointment, and the middle section is open for another service to be booked.

This shows an appointment nested in the open middle section of the first appointment. You can book this open time slot manually with the *Basic Book* method, or the *Appointment Builder* will search for it as available for booking.

 This shows 3 appointments in one time slot.

The only way to book this example is with the *Basic Book* method. The *Appointment Builder* will not search for it as available for booking.

 Red text for **New Request** visit type. Pink color for **Confirmed** status. Employee booked for first section of the appointment, middle section is open for another service to be booked, and the last section is booked with an associate, which is also available for booking.

The *Appointment Builder* will search for either of the last 2 time intervals and find them as being available.
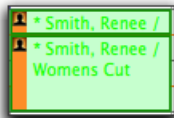
 Green text for **Walk In** visit type. Green color for **Checked In** status. The ***** to the left of the client name indicates multiple appointments for this client.
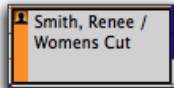
 Dark gray/black color for **No Show** status. **No Show** appointments are tracked on the *Appointments* tab of the *Client Card*.
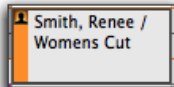
 Light gray color for **Completed** status. This indicates the ticket transaction has been paid for and closed.
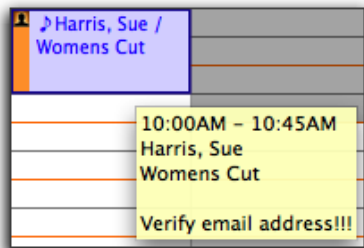
 Appointment details appear when the mouse cursor passes over the appointment, also called a *Mouse-Over*. The *Eighth-Note* symbol, just to the left of the client name, indicates there is a note connected with this appointment.

The note in this example is "Verify email address!!!"

 A *Glossy* or *Shiny* appearance on the appointment indicates the appointment was a **Pre-Booked** appointment. The *Glossy* appearance can also indicate an appointment was booked **Online** by the client, if you are subscribing to the *Online Services* features.
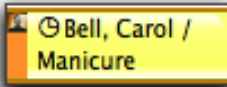
 The *Clock* symbol to the left of the client name indicates the appointment is part of a set of **Standing Appointments**.

Standing Appointments are the same appointments booked over and over into the future. Standing appointments will have the *Glossy* or *Shiny* appearance as they would be considered as **Pre-Booked** appointments as well.

Resizing and Moving Appointments
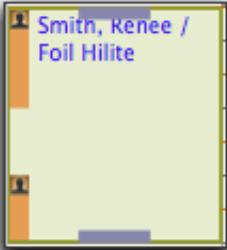
Click on an appointment to select and activate the resize bars at the top and bottom of the appointment. Resize the appointment by dragging the bars up or down. On an interval appointment, you can only resize the first and last intervals. No appointment or interval will resize to less than 15 minutes. If you resize an appointment in error, you may immediately restore it by pulling down the **Edit** menu and selecting the **Undo** option.
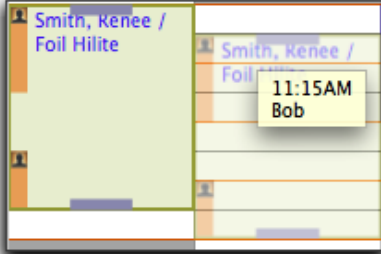
You may click between the bars and drag the appointment to a new location in the current or another employee's column. While dragging the appointment around to the place you wish to move it to, the *mouse-over* will show the time and employee you are moving the appointment over to.
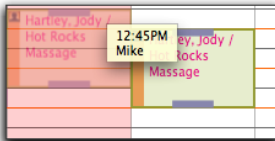
You will not be allowed to move an appointment to another employee's column if the employee does not perform the service. The columns for the employees who do not perform the service you are moving will turn a pink shade. If you move an appointment in error, you may immediately restore it by pulling down the **Edit** menu and selecting the **Undo Move Appointment** option.

If the service you are moving is to a different time slot with the same employee, the following message will appear.
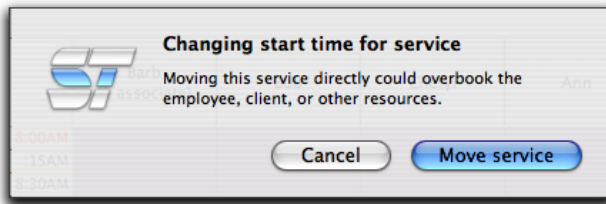
Click **Move Service** if you are sure you want to move the service to a different time slot with the same employee. Click **Cancel** if you wish to retain the original time slot.

If the service you are moving is to a different employee, the following message will appear.
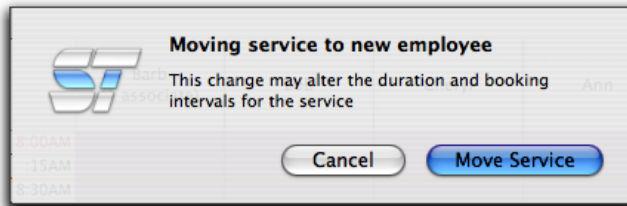
Click **Move Service** if you are sure you want to move the service to a different employee. Click **Cancel** if you wish to retain the service with the original employee.

NOTE: It is very important you know what appointments you are moving. If the client is receiving more than one service for his/her appointment, there will be an asterisk (*) in front of the client name when looking at the Appointment Calendar. Moving only one of the services of a multi-service appointment to a different time slot, or a different employee, could have a negative effect on the rest of the appointment. STX allows you to move one service at a time within the multi-service appointment, so when one service is moved, the other services will NOT follow. The other services must be moved as well. As an alternative, *Reschedule* the appointment instead.

If the entire multi-service appointment needs to be moved, rather than moving each service individually, a safer way is to use the **Reschedule** feature. Double-click on the multi-service appointment you wish to move to open the **Appointment Detail** screen.
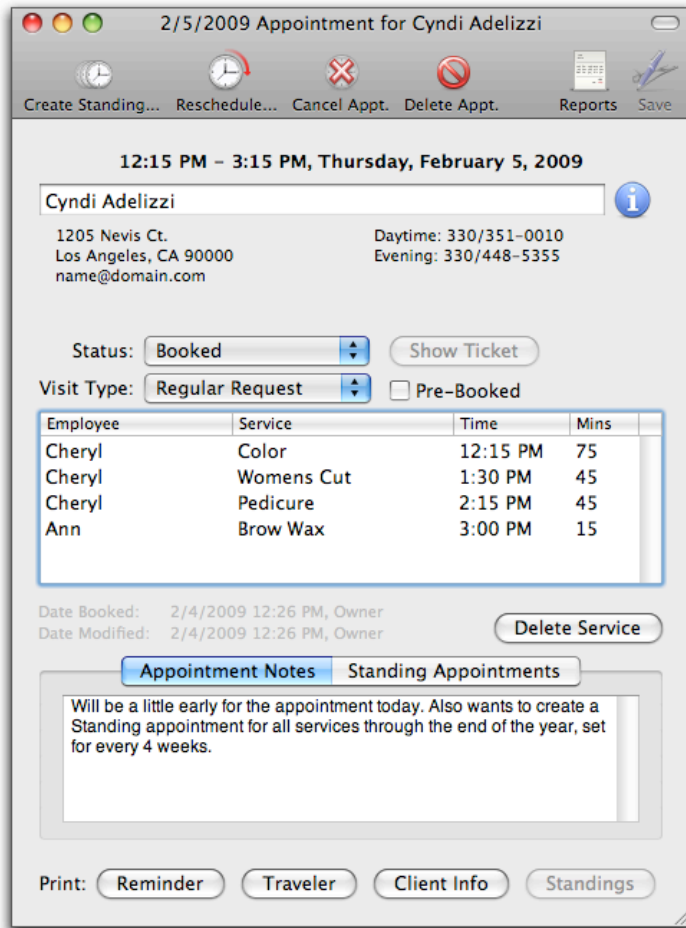
Click the **Reschedule** icon located at the top of the screen to search for different availabilities through the *Appointment Builder*. Using this method to 'move' the entire appointment will keep you from having to remember to move all services associated with the appointment, each one individually.

Canceling Appointments

You may cancel an appointment several different ways. If the client is booked for more than one service in a *multi-service* appointment, you can cancel the entire appointment, remove one or more services from within the appointment, or delete the entire appointment without it being tracked as **Canceled**. Canceled appointments are tracked on the *Appointments* tab of the *Client Card*.

To cancel the entire appointment, whether it is just a single-service or a multi-service appointment, double-click the appointment to open the **Appointment Detail** screen.
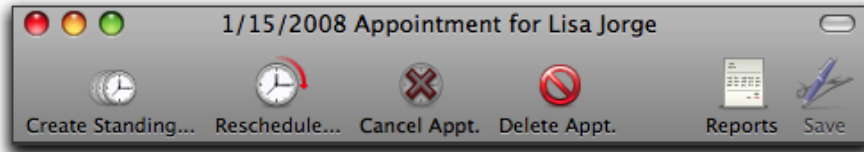
Click the **Cancel Appt.** icon located at the top of the detail screen. This will cancel the entire appointment, regardless of it being a single-service appointment or a multi-service appointment. Click **Save** and then **Close** the detail screen. The entire appointment has now been canceled and will be tracked on the *Appointments* tab of the *Client Card*.

To remove one or more services from a multi-service appointment, but not cancel or delete the entire appointment, double-click on the appointment to open the **Appointment Detail** screen.

Highlight the service you wish to remove and click **Delete Service**. Continue until all desired services have been removed. Click **Save** and then **Close** the detail screen.

Another way to delete one service from a multi-service appointment is to highlight the service on the **Appointment Calendar** and press the **Delete** key on your keyboard. The following message will appear.

Click **Delete** if you are sure you want to remove the service from the multi-service appointment, leaving the other services in tact. Click **Cancel** to retain the original appointment.

To completely DELETE the entire appointment without having it tracked as **Canceled** on the *Appointments* tab of the *Client Card*, double-click on the appointment to open the Appointment Detail screen.
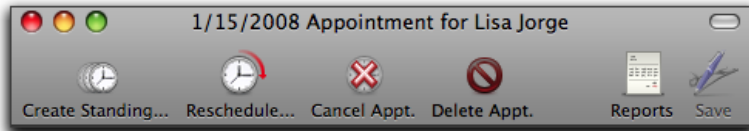
Click the **Delete Appt.** icon at the top. The following message will appear.
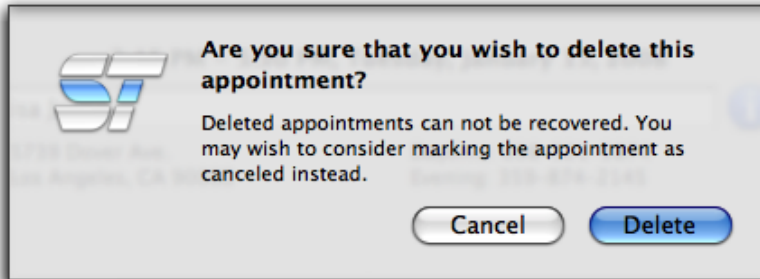
Click **Delete** if you are sure you want to delete the entire appointment. Click **Cancel** to retain the original appointment. Clicking **Delete** will completely remove the entire appointment from the **Appointment Calendar** without tracking it as **Canceled** on the *Appointments* tab of the *Client Card*.

NOTE: It is not recommended everyone on your staff have the ability to **Delete** appointments. It is best to **Cancel** the appointment instead, as it will be tracked on the client's card. Deleting appointments completely removes all traces the appointment ever existed to begin with.

If you are wanting to delete a single-service appointment AND have it tracked as **Canceled** on the *Appointments* tab of the *Client Card*, click *ONE* time on the appointment to activate it on the **Appointment Calendar**. Press the **Delete** key on your keyboard. The following message will appear.
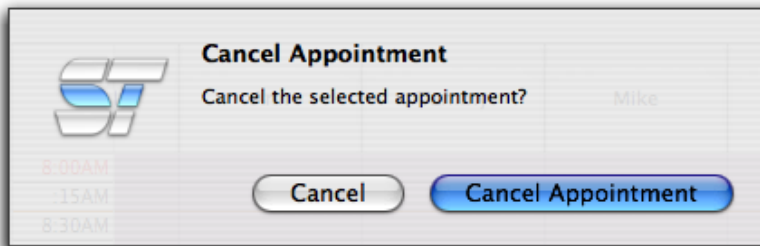
Click **Cancel Appointment** to cancel the single-service appointment. Click **Cancel** to retain the appointment. If you cancel an appointment in error, you may immediately recall it by pulling down the **Edit** menu and selecting the **Undo** option.

Appointments: Booking Appointments

Purpose
There are two ways to book an appointment. You can click and drag downward from the starting time slot under and employee and use the **Basic Book** method, or you can double-click on the starting time slot for the employee and use the **Appointment Builder**. The **Appointment Builder** can also be opened by clicking the **Build Appointment** button found below the list of employee names in the lower left hand corner of the **Appointment Calendar**. There is also an **Appointment Builder** option in the *Appointments* menu, or you can click the **Builder** icon in the appointment toolbar.

The **Basic Book** method breaks any rules you have set up for booking services, employees, and/or resources. The **Appointment Builder** follows all rules you have set up for booking services, employees, and/or resources. When using the **Appointment Builder**, you never have to look at the appointment calendar to schedule an appointment. The **Appointment Builder** coordinates it all for you regardless of how many services and/or employees you are booking at the time.

Booking Alerts
STX allows you to set **Booking Restrictions** on the *Client Card* for those clients whom you need be alerted to certain information at the time the client tries to book an appointment.

Booking Restrictions can be set by going to *Client: Client Cards: Client Info*. The **Booking Restrictions** area is located in the bottom left hand corner of the *Client Info* tab.

You must check the checkbox for **Booking Restrictions** if you wish to set the client with one. Select either of the following.

Alert Only simply shows an alert when booking the appointment for the client and allows you to continue to book the appointment.
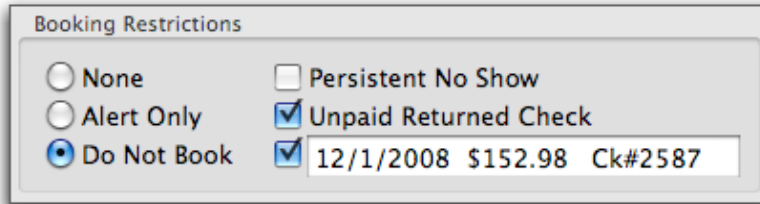
Do Not Book shows the alert when booking the appointment for the client, but does NOT allow you to continue booking the appointment.

Persistent No Show describes a client who books appointments with you regularly and does not show up for them.
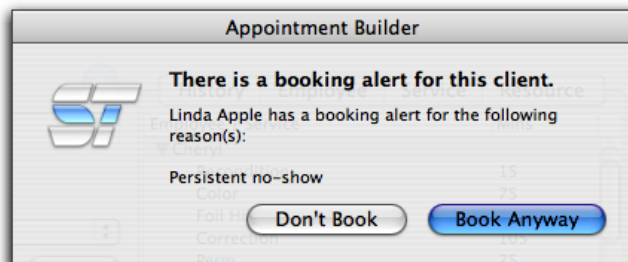
Unpaid Returned Check describes a client who wrote you a bad check.

The **Blank** field is the user definable field which allows you to enter specific information to show on the alert screen when booking an appointment for the client. If you wish to enter the date and amount of the *Unpaid Returned Check*, you may do so here. The information you have entered here is specific to this client and will not pertain to any other client with **Booking Restrictions**.

If you try to book an appointment for a client with a booking restriction, you will see one of the following two sheets.

This is the **Alert** and allows you the choice of booking the appointment by clicking **Book Anyway** or to not book the appointment by clicking **Don't Book**. Clicking **Don't Book** will take you back to where you started the booking process before entering the client name.
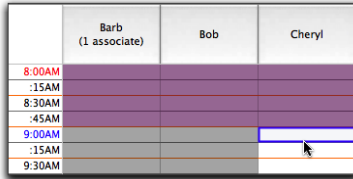
This is the warning telling you the client is set to not allow booking appointments with you at all. Clicking **OK** will take you back to where you started the booking process before entering the client name. Notice how the warning tells you the reason(s) why this client is not allowed to book an appointment.
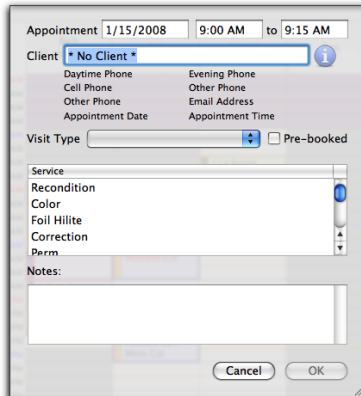
Basic Booking

Basic Booking allows you to book one or more services with a single employee only. From the **Appointment Calendar**, click in an open time slot under the employee you wish to book, and drag down to highlight at least a 15 minute segment of time, as shown in the following picture.

Release the mouse button and the following **Basic Booking** window will appear.
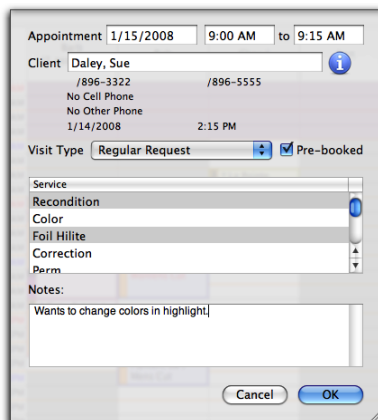
Fill in the **Client** name and select a **Visit Type**. Check the **Pre-Booked** box if this is a future appointment the client is making prior to leaving 'today'.

Click to highlight the service(s) to be performed. To select more than one service, hold the Apple (command) key on your keyboard, and click once on each desired service.

Once all desired services have been selected, enter a note about the appointment in the **Notes** field. You may also view the client's card by clicking the Info button (the blue circle with the **i** in it). Once all required information is selected, click **OK** to book the appointment or **Cancel** to cancel booking the appointment.

To use the **Basic Booking** method for booking a service on top of an existing service, hold the **Option (alt)** key on your keyboard. The **Appointment Calendar** will have a "washed out" appearance. While holding the **Option (alt)** key, drag the time you wish to double book a service in, right over the existing appointment.
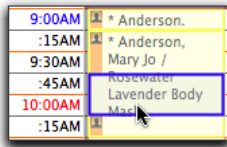
The **Basic Booking** screen will appear for you to 'double-book' the appointment. This method can also be used when booking 2 services to start at the exact same time.

Important Notes:

1. **Basic Booking** breaks all of the rules for resources, timing, and over-booking you might have established when setting up your data. **Basic Booking** overrides ALL of the rules. Using the **Appointment Builder** (see following section) is the safest way to book an appointment to prevent over-booking as well as wrongly booking an appointment because it needs to follow all of the rules.

2. When using the **Basic Booking** method to book an appointment with more than one service, you must have the services listed in the order they are to be performed. To make sure the services are in the correct order, go to *Setup: Services: Sequence* and move the services to the proper order. For example, you would want to have the chemical services listed before haircuts, as that is the order they are typically performed in. The **Basic Booking** screen will always book the services in the order they are listed, not in the order you select them.

Appointment Builder

Another way to book an appointment, which is better suited for an appointment with multiple services and/or employees, is with the **Appointment Builder**. Imagine never having to look at your Appointment Calendar again in order to book an appointment for a client!

The **Appointment Builder** is a powerful appointment-building tool that allows you to book a client's appointment by **History** of past appointments, by **Employee**(s) to perform the service(s), by **Service**(s) desired before selecting the employee(s), or by **Resources** required for specific services.

You can select as many different services with as many different employees as you like and the system will find the available time slots to fulfill your request, regardless of how complicated your request might be. The **Appointment Builder** does all of the coordinating for you, as well as follow all of the rules you have set for employees, services, and resources!

To build an appointment with the Appointment Builder, you will do one of the following:
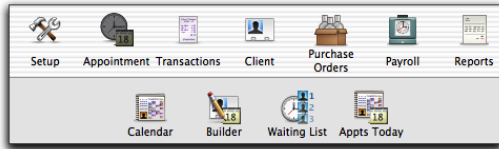
Use the main tool bar to click the **Appointments** and then **Builder** icons.
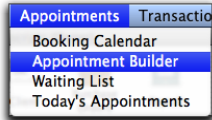
Use the menu bar for the **Appointments** menu and select **Appointment Builder**.
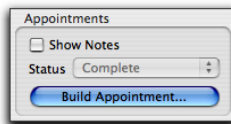
Click the **Build Appointment** button from the lower left hand corner of the **Appointment Calendar**.
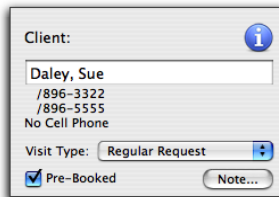
Once the **Appointment Builder** screen appears, start by selecting a **Client** name, **Visit Type** and if this appointment is **Pre-Booked** or not. You may also view the client's card by clicking the **Info** button (the blue circle with the **i** in it) or enter a note referencing the appointment by clicking the **Note…** button.
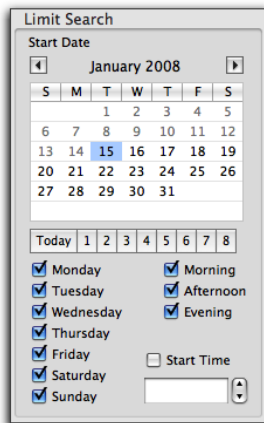
By default, the **Appointment Builder** searches ahead 14 days from the current date highlighted on the **Limit Search** calendar. The search will always return all available start times for the desired appointment to occur during the 14 day period beginning with the selected start date.
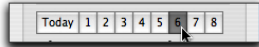
If the client is *Pre-Booking* an appointment, you can use the 'week' buttons to advance the search calendar ahead by so many weeks. Click the **6** button to advance 6 weeks to the future before starting the search. If you wish to start the search back on 'today's' date, click the **Today** button and the calendar will go back to whatever today's date is.

You can change the scope of this search by choosing another start date and/or time, and may limit the search by unchecking days and portions of days that the client is not available. For instance, the client cannot possibly come on Monday or Tuesday of any given week and can only come in the afternoon or evening. You would uncheck Monday and Tuesday as well as uncheck the Morning box.

You may even wish to have the search start at a particular time of day. If the client has requested any time after 10:00 am, you can check the **Start Time** box, and enter the time you want the search to start. All results will be *on* or *after* the designated time entered. If the client does not care what time of day the appointment is for, leave the **Start Time** box unchecked. Note: You do not need to change any of the **Limit Search** criteria, except for maybe the date you want the search to start. Unchecking the day of week boxes and segments of the day could possibly limit your search too much, ending up with nothing available. Because you want to give your client every possible time available, it is our recommendation that you leave the day of week boxes checked, leave the segments of the day boxes checked, and do not fill in a Start Time.

Click the **Reset All** button to reset the entire **Appointment Builder** screen, and start over with different information for scheduling the appointment.

By History

After selecting a client, their appointment **History** will automatically show on the **History** tab with all future appointment dates in **RED** text. All past appointments are in **BLACK** text.

The **History** will show as long as the client has had any past or future appointments booked. You may choose an entire appointment or individual service from this list to base the new appointment on.
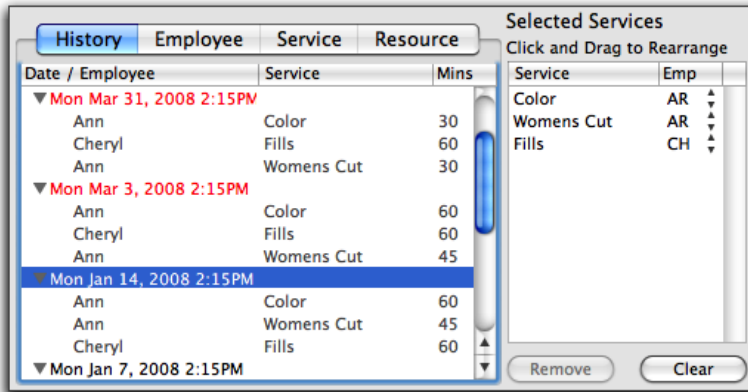
Double-clicking the *Date* of an existing appointment will move all services from that appointment to the **Selected Services** area on the right. Double-clicking an individual service from within an existing appointment date will move that one service to the **Selected Services** area on the right.

Using the **History** tab to book future appointments saves a lot of time when booking appointments that are recurring, but not a standing appointment, or when the client consistently books the same services each time.

STX will remember if a client needs a non-standard amount of time for a service. If a booked service time length is ever changed, the **History** tab will show the unique time length for the service. Booking that service again will ensure the same unique time length without you having to think about changing it again.
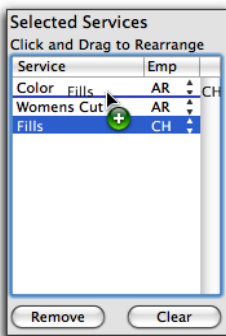
Once you have moved the desired services to the **Selected Services** area, you can organize and change the services listed there. Click and Drag to move the services to a different order for booking the appointment.

In this example, the *Fills* service is being moved between the *Color* and *Womens Cut* services.

Highlight a service and click the **Remove** button to remove just that one service from the appointment. Click the **Clear** button to clear all services from the **Selected Services** area and start over.

By Employee

After selecting a client, the visit type, Pre-Booked status, and the Limit Search criteria, click the **Employee** tab to book the appointment by **Employee**.
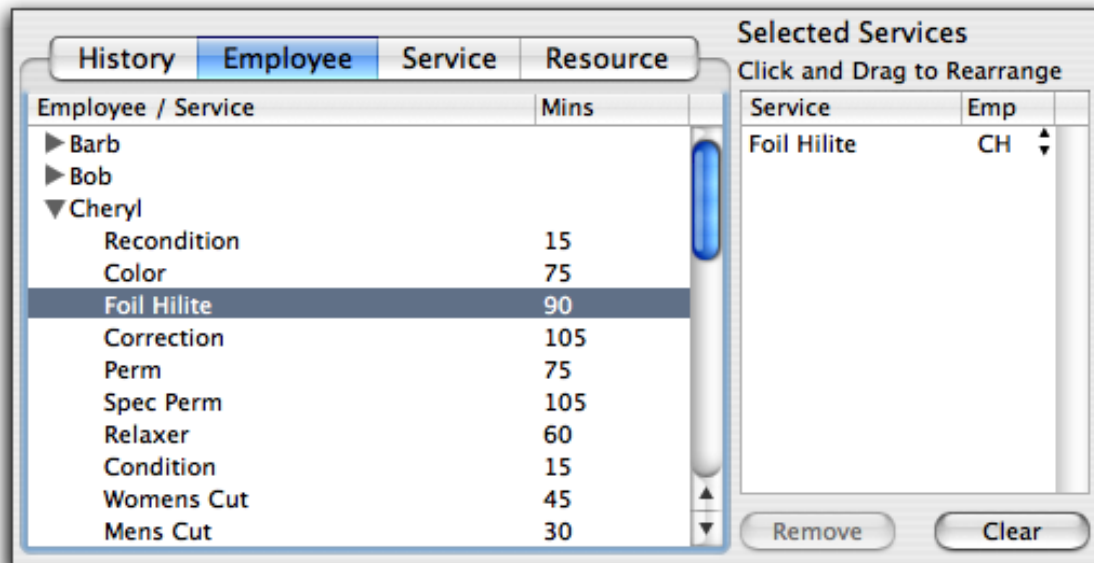
The **Employee** tab lists each employee that books appointments, and the services they perform. You can open the **Appointment Builder** to automatically go to the **Employee** tab by double-clicking on an employee's column from the *Appointment Calendar*. Once the **Appointment Builder** screen appears, the employee you double-clicked on will automatically be selected and that employee's services will be displayed.

Double-clicking a service will move the service into the list on the right in the **Selected Services** area. You may move as many services from as many employees as you wish to this area.

Once you have moved the desired services to the **Selected Services** area, you can organize and change the services listed there. Click and Drag to move the services to a different order for booking the appointment.

Highlight a service and click the **Remove** button to remove just that one service from the appointment. Click the **Clear** button to clear all services from the **Selected Services** area and start over.

Important Note: Leaving services set to ANY employee could increase the time it takes to search for available start times. This is especially true if multiple services are assigned to ANY employee. It is recommended that all services have a specific employee chosen in order to keep the search times to a minimum.

By Service

After selecting a client, the visit type, Pre-Booked status, and the Limit Search criteria, click the **Service** tab to book the appointment by *Service*.

The **Service** tab lists services and the employees that perform them. It is useful if a client wants a specific service but does not request a specific employee or if the desk staff does not know which employees perform specific services.

Double-clicking either ANY EMPLOYEE or the actual employee will move the service into the list at the right in the **Selected Services** area.

Once you have moved the desired services to the **Selected Services** area, you can organize and change the services listed there. Click and Drag to move the services to a different order for booking the appointment.

Highlight a service and click the **Remove** button to remove just that one service from the appointment. Click the **Clear** button to clear all services from the **Selected Services** area and start over.
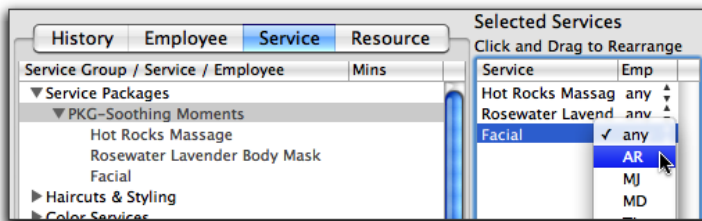
To book a Service Package, double-click on the package name to move the services within the package to the **Selected Services** area. Select the employee ID from the **Emp** popup menu to specify an employee for each service. Leave the ID to **any** if a particular employee is not specified for the service(s).

Important Note: Leaving services set to ANY employee could increase the time it takes to search for available start times. This is especially true if multiple services are assigned to ANY employee. It is recommended that all services have a specific employee chosen in order to keep the search times to a minimum.

By Resource

After selecting a client, the visit type, Pre-Booked status, and the Limit Search criteria, click the **Resource** tab to book the appointment by *Resource*. A **Resource** is a piece of equipment, room, or chair utilized by specific services such as a Tanning Booth, Pedicure Chair, Wet Room, etc. If you have limited resources with which to perform services, STX will not allow those resources to be overbooked when using the **Appointment Builder** to book the appointment(s).
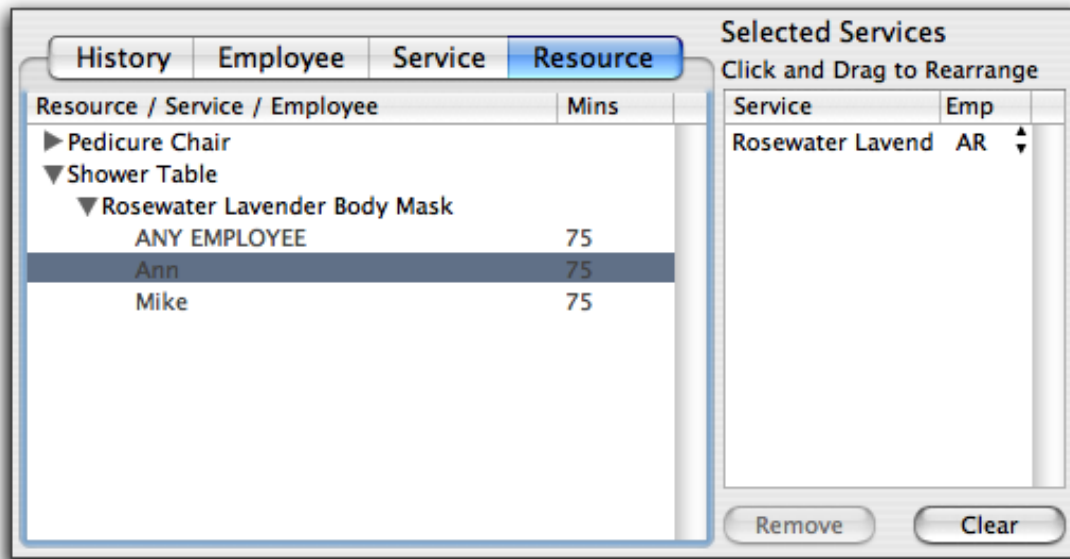
The **Resource** tab lists resources and the services that utilize them. To book a **Resource**, double-click on the service that uses the **Resource** to move the service to the **Selected Services** area. Select the employee ID from the **Emp** popup menu to specify an employee for each service. Leave the ID to **ANY** if a particular employee is not specified for the service.
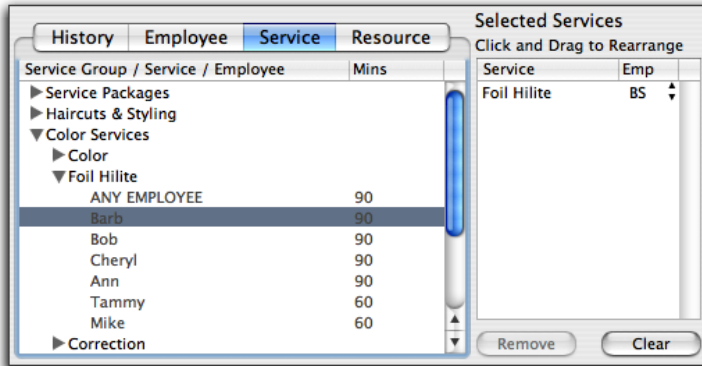
Once you have moved the desired services to the **Selected Services** area, you can organize and change the services listed there. Click and Drag to move the services to a different order for booking the appointment.

Highlight a service and click the **Remove** button to remove just that one service from the appointment. Click the **Clear** button to clear all services from the **Selected Services** area and start over.

Important Note: Leaving a service set to ANY employee will increase the time it takes to search for available start times. This is especially true if multiple services are assigned to ANY employee. It is highly recommended that all services have a specific employee chosen in order to keep the search times to a minimum.

Booking the Appointment

The last step before starting your search is to verify the **Selected Services** list has the correct services with the correct employees in the correct order. You can change the employee from the **Emp** popup. You can remove a service from the list by selecting it and clicking **Remove** or you can remove all services and start over by clicking **Clear**. You can also click and drag a service to change its sequence in the list.
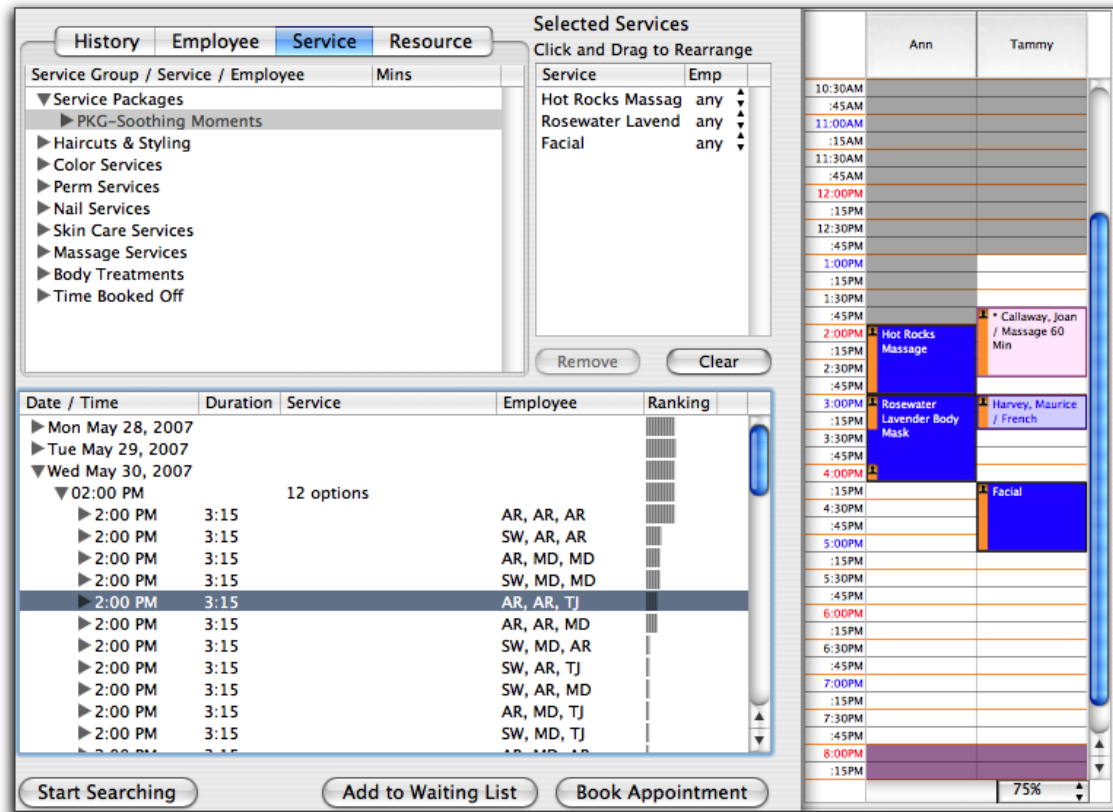
Once you are satisfied with the **Selected Services** list, click the **Start Searching** button. You will be presented with a list of available dates for the 14 day period, beginning with the selected start date. Click on the right pointing arrow in front of the day to reveal the available starting times, then click the right pointing arrow in front of the desired starting time to reveal the services, employees and ranking.

You can choose to have the search results sorted by either **Date and Time** or by **Date, Rank and Time**. To choose the sort order, go to the STX menu to *Preferences: Appointments*. The following screen will appear.
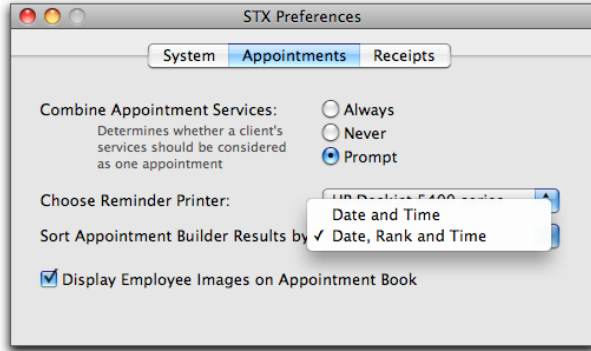
Use the **Sort Appointment Builder Results by** popup menu to make your selection. If you sort by **Date and Time**, the search results will always be in date and time order, with the rank still showing.

If you sort by **Date, Rank and Time**, the search results will first be in date order, then the ranking order, and then the time order. Because it puts the **Ranking** before the time order, the times may not be in chronological order. The longer the **Ranking** bar, the better the appointment will fit into the day. By **Ranking** the appointment times, you can help to eliminate the small openings between appointments, the 'swiss cheese' effect.

Ranking the appointment times provides the following benefits:
1. Maximizes the number of appointment edges touching either another appointment, the client's existing appointment, or the beginning or end of an employee's day.

2. Minimizes the number of employees involved in an appointment for a client by creating a higher ranking for fewer employees. This has the effect of allowing a single employee to perform as many of the service requests as possible while keeping the "shuffling" of the client around between employees to a minimum.
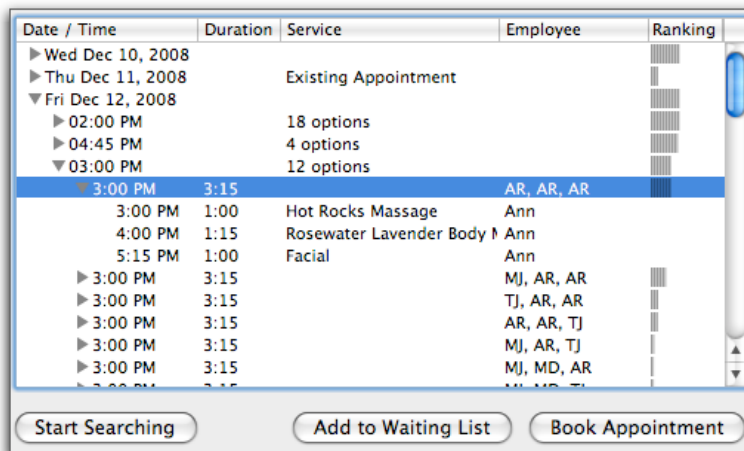
If you left the service(s) set to search for **ANY** employee before searching, you will see the different number of options available for each specific starting time. Click the right pointing arrow in front of the desired starting time to reveal the different employee options and ranking.

If you selected specific employees for each service before searching, you will see the available start times listed under each date without a right pointing arrow. In either case, select the desired starting time by highlighting it in the list.

If the client already has an existing appointment during the search period, you will be able to see it noted in the search results list. This is a great way to remind the client they already have an appointment scheduled, as maybe they forgot when they contacted you for a new appointment, and eliminate any duplicate bookings for the client.
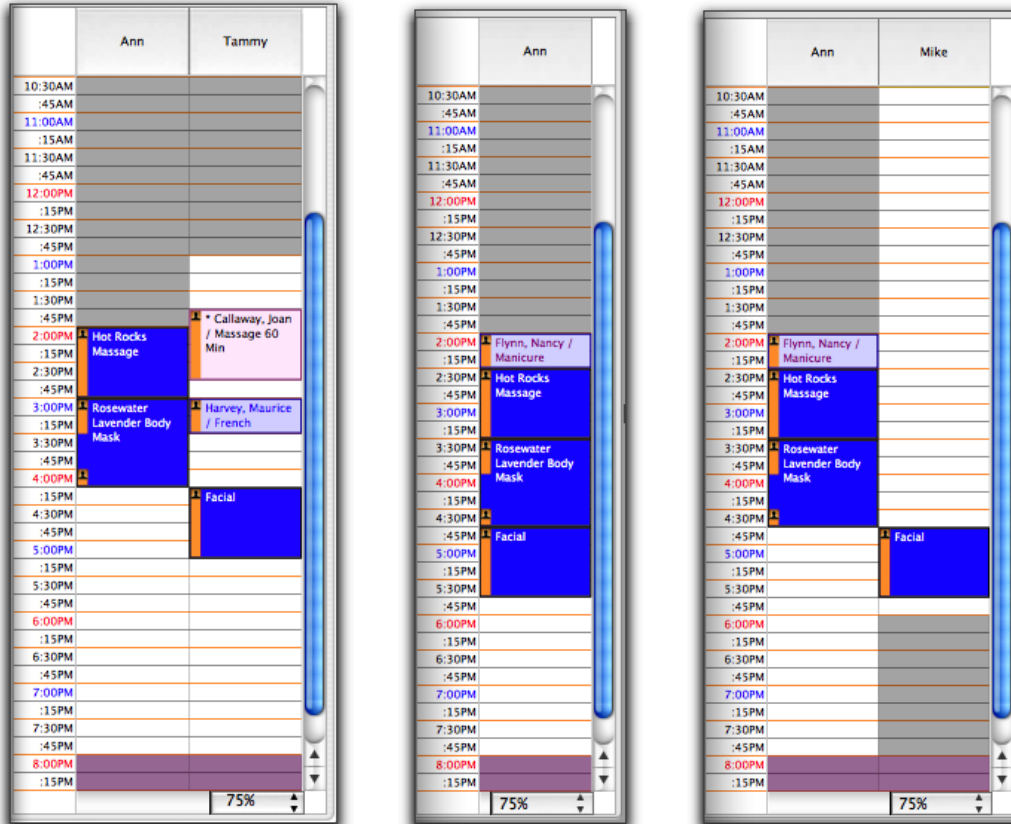
Each time you highlight a starting time for the appointment, a sheet will appear out to the side to show you exactly where that appointment will be booked for the date/time you have chosen. Use the up or down arrow on your keyboard to move through the available starting times to see where you would choose for the appointment to be booked if you do not want to 'trust' the appointment ranking.

You may clear the available dates at any time by changing the search criteria in the **Limit Search** area or by changing the **Selected Services** list. This may be necessary to do if no acceptable starting dates or times are returned by the current search results. Once you have changed the search criteria, simply click **Start Searching** again for a new listing of search results.
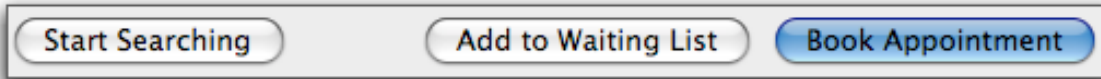
Once you and the client have agreed on a time for the appointment to be booked, click **Book Appointment**.

Please note the **Book Appointment** button will not be enabled for the following reasons:
- If you have not highlighted a starting time for the desired appointment.
- If you do not have a client name on the Appointment Builder screen.
- If you have not selected a client *Visit Type*.

Once you click the **Book Appointment** button, the following **Appointment Detail** screen will appear.

2/5/2009 Appointment for Cyndi Adelizzi

Create Standing...   Reschedule...   Cancel Appt.   Delete Appt.   Reports   Save

12:15 PM – 3:15 PM, Thursday, February 5, 2009

Cyndi Adelizzi

1205 Nevis Ct.   Daytime: 330/351-0010
Los Angeles, CA 90000   Evening: 330/448-5355
name@domain.com

Status: Booked   Show Ticket

Visit Type: Regular Request   ☐ Pre-Booked

Employee	Service	Time	Mins
Cheryl	Color	12:15 PM	75
Cheryl	Womens Cut	1:30 PM	45
Cheryl	Pedicure	2:15 PM	45
Ann	Brow Wax	3:00 PM	15

Date Booked: 2/4/2009 12:26 PM, Owner
Date Modified: 2/4/2009 12:26 PM, Owner   Delete Service

Appointment Notes   Standing Appointments

Will be a little early for the appointment today. Also wants to create a Standing appointment for all services through the end of the year, set for every 4 weeks.

Print: Reminder   Traveler   Client Info   Standings

This **Appointment Detail** screen allows you to reiterate to the client when they selected to have their appointment scheduled. If you do not need to change anything within this screen, simply close the window. Please see the section *Appointments: Appointment Detail* for more information regarding the above screen.
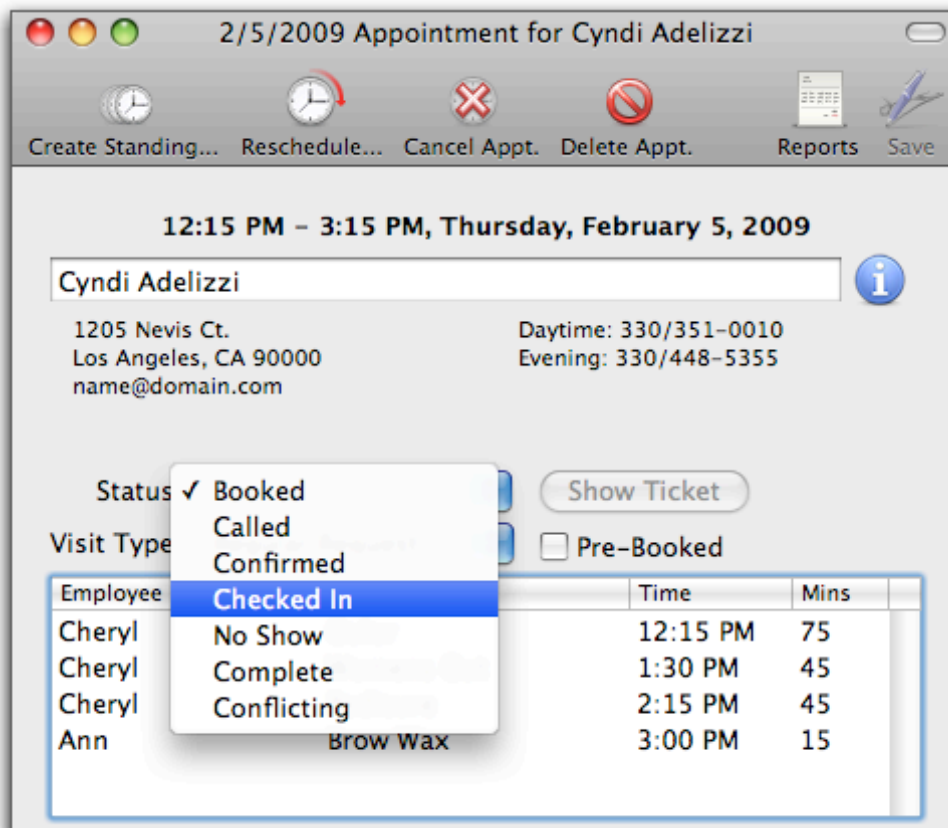
Appointments: Appointment Status

Changing appointment Status
Purpose

The Appointment Status is the color coded border surrounding an appointment indicating which status has been set to the appointment.

- **Blue** indicates the appointment is *Booked*
- **Yellow** indicates the appointment has been *Called*
- **Pink** indicates the appointment has been *Confirmed*
- **Green** indicates the appointment has been *Checked In*
- **Black** indicates the appointment is a *No Show*
- **Gray** indicates the appointment is *Complete*

There are a couple of different ways to change the status of an appointment. To change the **Appointment Status** of an existing appointment, perform one of the following options.

Open the **Appointment Detail** screen by double-clicking an existing appointment, and use the **Status** popup menu.
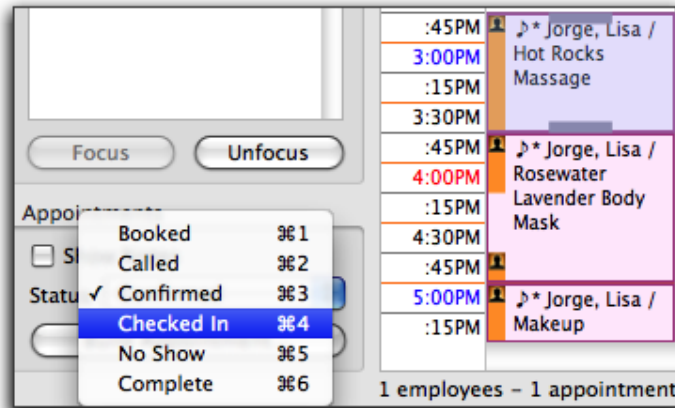
Click one (1) time on the desired appointment, and use the **Status** popup menu on the bottom left hand corner of the *Appointment Calendar* screen.

Note the keyboard commands next to each **Status** option. Holding the Command key on your keyboard combined with the appropriate number will automatically change the **Status** on the highlighted (active) appointment.

> Command 1 = Booked
> Command 2 = Called
> Command 3 = Confirmed
> Command 4 = Checked In
> Command 5 = No Show
> Command 6 = Complete

Normally the status for *Complete* is set automatically once the ticket transaction for the client has been paid for. You typically will never have to use this status option yourself.
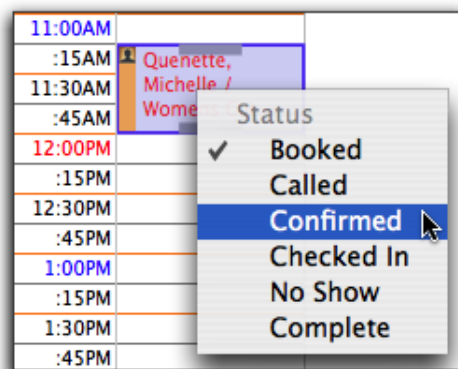

Another way to change the **Status** of an appointment is to hold the Control (ctrl) key down on your keyboard while clicking one time on an appointment you wish to change the **Status** for, also known as 'right-click'. This will cause a *Contextual* menu to appear, allowing you to set the status immediately, without having to open any other screens or use any other keyboard commands.
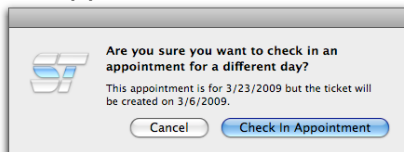
Checking In Appointments

When selecting the **Checked In** status, a *Client Visit* ticket transaction will automatically be created for the client. Each service being performed will be included on the *Client Visit* ticket, along with each employee performing them.

If an appointment for a past date is accidentally checked in, the following alert will appear.
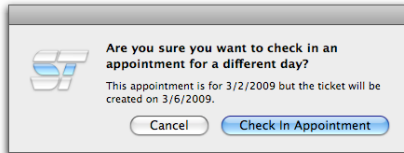
If an appointment for a future date is accidentally checked in, the following alert will appear.

In either case, click **Cancel** and the appointment will NOT be checked in and a ticket transaction will NOT be created for the client. Click **Check In Appointment** to check in the appointment and have a ticket transaction created for the client on 'today's' date.

If a *Client Visit* ticket transaction is created by mistake, it will be necessary to delete the ticket transaction before you can change the **Appointment Status** back to the original setting.

Appointments: Appointment Detail

Purpose

The **Appointment Detail** screen allows you to control many aspects of a scheduled appointment.

- Change the Client Name
- Look up confirmation phone numbers for the client
- Go directly to the client card to update information
- Check and/or Change the Status of the Appointment
- Edit the Visit Type
- View completed ticket transaction (if there is one)
- Edit Pre-Booked Status
- Edit Appointment Note
- Create a Standing Appointment
- View listing of Standing Appointments for the client
- Edit any future Standing Appointments for the client
- Reschedule the Appointment
- Delete the Entire Appointment
- Cancel the Entire Appointment
- Delete one Service from the Appointment
- Print a Reminder Label (if using a Dymo Label Writer printer)
- Print a Traveler for this Client only
- Print a Client Info report for this Client only
- Print a listing of all Standing appointments
- Check the Date Booked/Modified and by Whom

Detail

To open the **Appointment Detail** screen, double-click on any appointment showing on the *Appointment Calendar*.
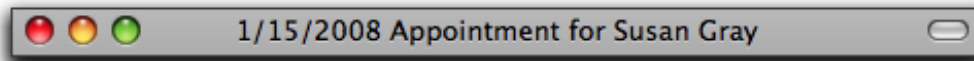
The *Title Bar* of the **Appointment Detail** screen shows which appointment you have opened.

Create Standing: Create a standing appointment from an existing appointment. The future standing appointments will be booked on the same day of the week, at the same time, for the same services and employees as the one you opened the **Appointment Detail** screen for. You set the number of days, weeks, or months between each standing appointment.

Reschedule: Opens the **Appointment Builder** containing this appointment's information to allow for another search or for services to be added and/or changed.

Cancel Appt: Cancels the entire appointment, removes it from the *Appointment Calendar*, and tracks the canceled appointment on the *Client Card* on the *Appointments* tab.

Delete Appt: Deletes the entire appointment, removes it from the *Appointment Calendar*, and does NOT track the appointment at all in relation to the client's card.
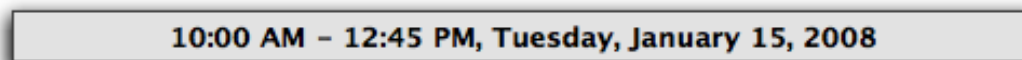
The **Appointment Detail** screen shows the time and date details of when the appointment is occurring. This makes confirmation calls much easier to make.

Susan Gray ⓘ

The client name field may be used to choose another client or enter a new client. The client Info button (the blue circle with the **i** in it) takes you to this client's card.

Susan Gray ⓘ

675 Boston Way   Daytime: 258-974-1587
Los Angeles, CA 90000   Evening: 258-987-5214
sgray@mac.com   Cell: 258/987-5200

The client's contact information is displayed below the client name field if your login password allows access to this information. Any changes made to the client record will automatically show here. **Note: If you make any changes to the client's information, you must first save the changes on the client card before returning to the *Appointment Detail* screen.**

Booked
Called
Status ✓ Confirmed
t Type   Checked In
          No Show
ployee   Complete
rb   Conflicting

The **Status** menu allows you to change the **Status** of the appointment to any of the menu options. Once you have changed the S**tatus** menu, click the **Save** icon and close the window.

Visit Type ✓ Regular Request
Employee   Salon Client
Barb   Spa Client
Barb   New Request
Barb   Salon To Spa Referral
            Spa To Salon Referral
            Walkin
            Retail Only

The **Visit Type** menu allows you to change the **Visit Type** for the client. Once you have made changes to the **Visit Type** menu, click the **Save** icon and close the window.

Show Ticket

The **Show Ticket** button takes you directly to the client's *Client Visit* ticket transaction, if there is one. The client must have been **Checked In** before this button will become activated.

☑ Pre-Booked

The **Pre-Booked** checkbox allows you to either check or uncheck if it was not done at the time the appointment was created. Once you have made changes to the **Pre-Booked** status, click the **Save** icon and close the window.

```
Date Booked:    7/31/2003 9:53 PM, Owner
Date Modified:  1/15/2008 7:28 PM, Owner
```

The **Appointment Detail** screen shows the date the appointment was booked and by whom, as well as if/when the appointment was last modified and by whom.

The **Delete Service** button allows you to delete one service at a time from a multi-service appointment, without deleting the entire appointment. This is a shortcut to using the **Reschedule** icon wherein all you wish to do is remove a service.

Employee	Service	Time	Mins
Barb	Condition	10:00 AM	15
Barb	Foil Hilite	10:15 AM	90
Barb	Womens Cut	11:45 AM	60

Date Booked: 7/31/2003 9:53 PM, Owner
Date Modified: 1/15/2008 7:28 PM, Owner   **Delete Service**

To remove the service from the appointment, highlight the service you wish to remove and click Delete Service. If you have deleted any services from this appointment, click the **Save** icon before closing the window. If you deleted the wrong service from the appointment, go to the **Edit** menu and select the **Undo** option. Or, simply **Close** the window first, and then click **Don't Save**. Re-open the **Appointment Detail** screen by double-clicking on the appointment again.

Note: Removing a service from a multi-service appointment could have a negative effect on the rest of the appointment. Please make sure you remember to adjust any remaining services from the appointment if necessary.

Appointment Notes   Standing Appointments

Would like to book standing appointments for all of these services through the end of the year.

The **Appointment Notes** field allows you to edit or add notes to the appointment.
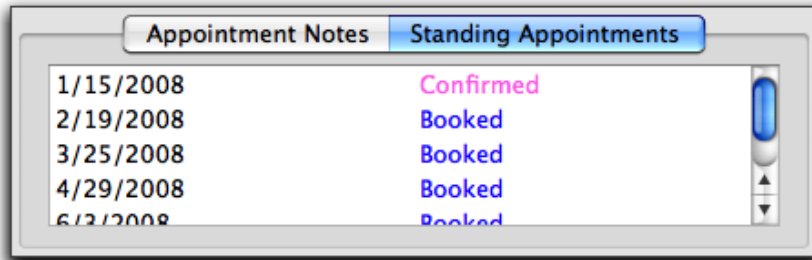
Standing Appointments shows the listing of all future *Standing* appointments. Double-click on a particular date to see the **Appointment Detail** screen for that specific appointment. The **Status** of the appointment is showing in the list next to the date.

There are 4 **Print** options in the **Appointment Detail** screen.

Reminder prints a reminder label for this appointment if using the Dymo Label Writer printer. You can also print a reminder to the Receipt Printer, or any other printer of your choosing. The reminder printer is set by going to the STX menu to *Preferences: Appointments*.

Traveler prints the *Traveler* report for this client only.

Client Info prints the *Client Information* report for this client only.

Standings prints the listing of all standing appointments booked for this client only.

Save all changes made to the Appointment Detail screen by clicking the **Save** icon, and then close the window by clicking the red gumdrop. If you close the window first, without clicking the **Save** icon, the following screen will appear.
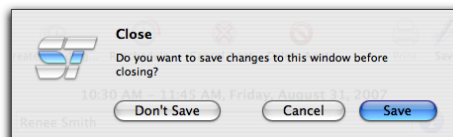
Click **Don't Save** to close the window without saving any of the changes you made.

Click **Cancel** to return to the **Appointment Detail** screen.
Click **Save** to save the changes you have made.
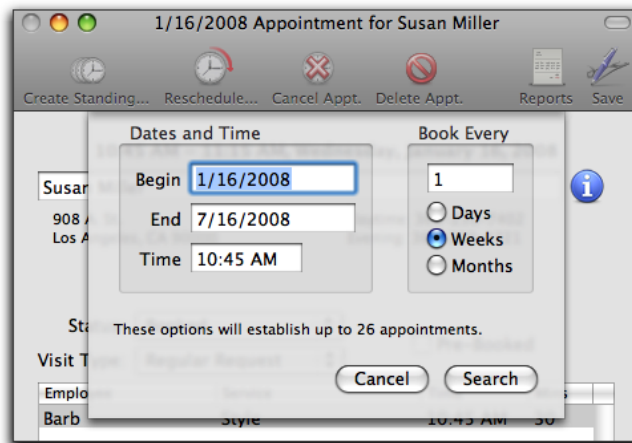
Appointments: Standing Appointments

Purpose
Standing appointments allow for booking several recurring appointments at one time, saving the time involved in booking them individually. The future standing appointments will be booked on the same day of the week, at the same time, for the same services and employees as the one you opened the *Appointment Detail* screen for. You set the number of days, weeks, and months between each standing appointment. The only time they will not be booked on the same day of the week is if you choose a certain number of Days or Months between each standing appointment.

Create a Standing Appointment
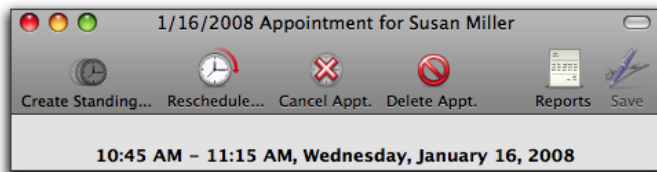
To create a standing appointment, double-click to open the details of the appointment you want to create the standing appointment from, and click the **Create Standing** icon in the toolbar of the *Appointment Detail* screen. All services on the selected appointment will be included in the standing appointments.

Once you click the **Create Standing** icon from the *Appointment Detail* screen, a sheet will drop down for you to fill in the required information to book the standing appointment.

The **Begin** date will be the date of the appointment you just opened the Appointment Detail screen for. The **End** date will automatically be six (6) months from the **Begin** date. The **Time** will be the start time of the first service of the appointment you just opened the Appointment Detail screen for.

Enter the number of Days, Weeks, or Months between each standing appointment, keeping in mind that using Days or Months will create appointments on different days of the week.

You may change any of these items to satisfy the client's needs. Consider establishing a standard **End** date for all standing appointments so you will be able to extend them on a scheduled basis rather than having to "remember" when someone's standing appointments run out.

These options will establish up to 26 appointments.

Each time you make changes to the dates, times, or interval between appointments, you will see how may appointments you will possibly be scheduling.

Cancel   Search

Click **Search** to find available appointments, or click **Cancel** to return to the *Appointment Detail* screen without booking any standing appointments. Clicking the **Search** button will cause the following window to appear.
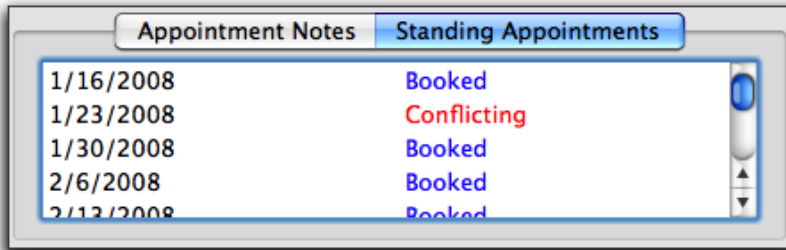
Schedule these appointments?

Appointments are available for 10:45 AM on the following days:
Wed Jan 30, Wed Feb 6, Wed Feb 13, Wed Feb 20,
Wed Mar 5, Wed Mar 12, Wed Mar 19, Wed Mar 26,
Wed Apr 9, Wed Apr 16, Wed Apr 23, Wed Apr 30,
Wed May 14, Wed May 21, Wed May 28, Wed Jun 4,
Wed Jun 11, Wed Jun 18, Wed Jun 25, Wed Jul 2,
Wed Jul 9, Wed Jul 16.

Appointments have conflicts on the following dates:
Wed Jan 23, Wed Feb 27, Wed Apr 2, Wed May 7.
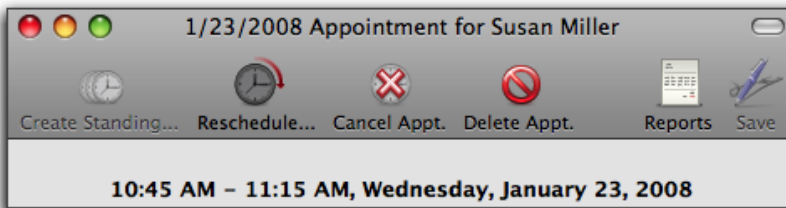
Schedule All   Cancel   Schedule Available

The **Schedule these appointments?** window contains a list of available appointments. If there are any conflicting dates, you will also see a list of appointments that can't be booked because of conflicts with appointments already scheduled for the time you are trying to schedule the standing appointment.

Click **Schedule Available** to only book the standing appointments where there are no conflicts. If you choose this option, you will need to make a note of the conflicting dates so you can book the appointments separately from the standing. Click **Cancel** to return to the *Book Standing* sheet to reset or change the standing appointment criteria. Click **Schedule All** to book all of the appointments, including the conflicting ones.

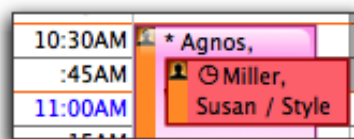| Appointment Notes	Standing Appointments
1/16/2008	Booked
1/23/2008	Conflicting
1/30/2008	Booked
2/6/2008	Booked
2/13/2008	Booked

Once the standing appointments are booked, the *Appointment Detail* screen will reappear to show all of the standing appointments you just booked for the client. The conflicting date(s), if any, will appear. To change the conflicting appointment, double-click on the conflicting date to open the *Appointment Detail* screen for it.

1/23/2008 Appointment for Susan Miller

Create Standing...   Reschedule...   Cancel Appt.   Delete Appt.   Reports   Save

10:45 AM – 11:15 AM, Wednesday, January 23, 2008

Click the **Reschedule** icon to reschedule that one appointment from within the set of standing appointments. The following alert will appear.

Are you sure that you wish to reschedule this standing appointment?

This appointment is part of a standing appointment with 1 earlier appointment and 25 future appointments.

Rescheduling this appointment will remove it from the list of standing appointments.

Cancel   Reschedule Appointment

Click the **Reschedule Appointment** button to change the time, through the *Appointment Builder*, so it will not conflict with another appointment already scheduled for that time. Click **Cancel** and manually go to the conflicting date and move the appointment to a different time slot.

| 10:30AM	* Agnos,
:45AM	Miller,
11:00AM	Susan / Style

Manually going to the conflicting date will show the standing appointment resting right on top of the appointment that was already scheduled before creating the standing.
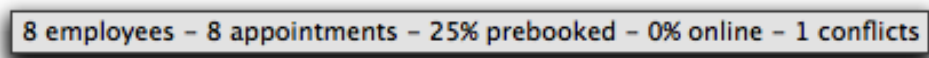
The conflicting appointment will always stand out with the red background color. Simply drag the appointment to a different time. The following alert will appear.
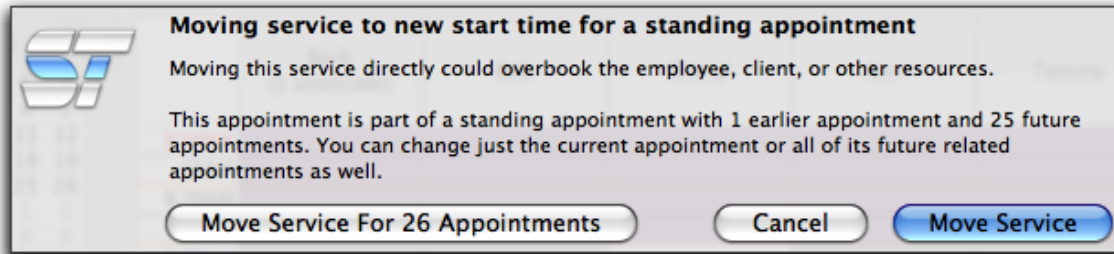
The **Move Service for XX Appointments** button will move all of the remaining standing appointments to the "new" time. The **Move Service** button will only move the one service and therefore *remove* it from the listing of standing appointments. It removes it from the standing status because it no longer fits the criteria that the rest of the standing appointments do. It is now considered just a single appointment, not linked to any other appointments. Click **Cancel** to return back to the appointment calendar.
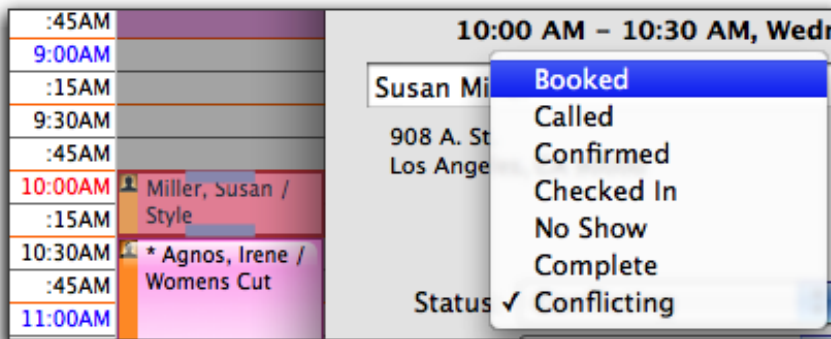
Once the appointment is moved, you must change the **Status** of the appointment from **Conflicting** to something else because it is no longer a conflicting appointment. Note: You will only see the **Status** option of **Conflicting** from within the *Appointment Detail* screen.

The statistics showing at the bottom of the *Appointment Calendar* will show the conflicting appointments on each day. **Conflicting** appointments are only created when a **Standing** appointment has been booked with the **Schedule All** button being clicked. If you do not want to create **Conflicting** appointments, click the **Schedule Available** button when booking the **Standing** appointment.
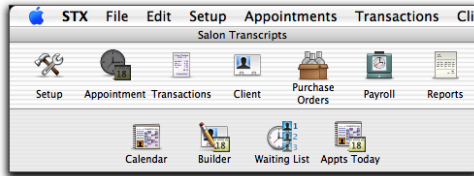
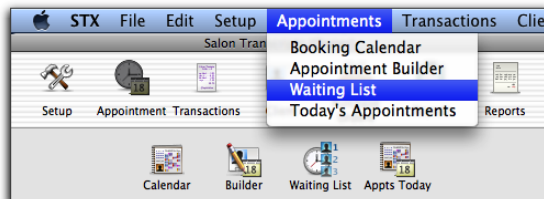# Appointments: Waiting List

Purpose

The **Waiting List** is a listing of clients with appointment requests for times that are not available at the time of the appointment search. It allows you to book appointments based on the appointment request and shows if the request has expired or not. You can see the details of the appointment request as well as add/edit appointment notes.
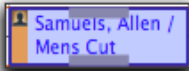
Opening the Waiting List

There are a few different ways to open the **Waiting List**, as shown below.

To open the **Waiting List**, click the *Appointments* icon from the main Toolbar and then click **Waiting List**.

Use the *Appointments* menu from the menu bar and pull down to **Waiting List**.

Click one time on the appointment on the appointment calendar that is canceling. On the keyboard, hold the combination of *Shift Delete* keys and release them at once. The following alert will appear.


Click **Cancel** if you do not wish to cancel this appointment and return to the appointment calendar. Click **Cancel Appointment** to cancel the appointment and force the **Waiting List** to automatically appear.

Note: The only way to force the Waiting List to automatically appear when canceling an appointment, is to hold the combination of *Shift Delete* keys on your keyboard once you have selected the appointment to cancel from the appointment calendar.

Adding Appointments to the Waiting List

To add an appointment request to the **Waiting List**, you must use the *Appointment Builder* to do so.
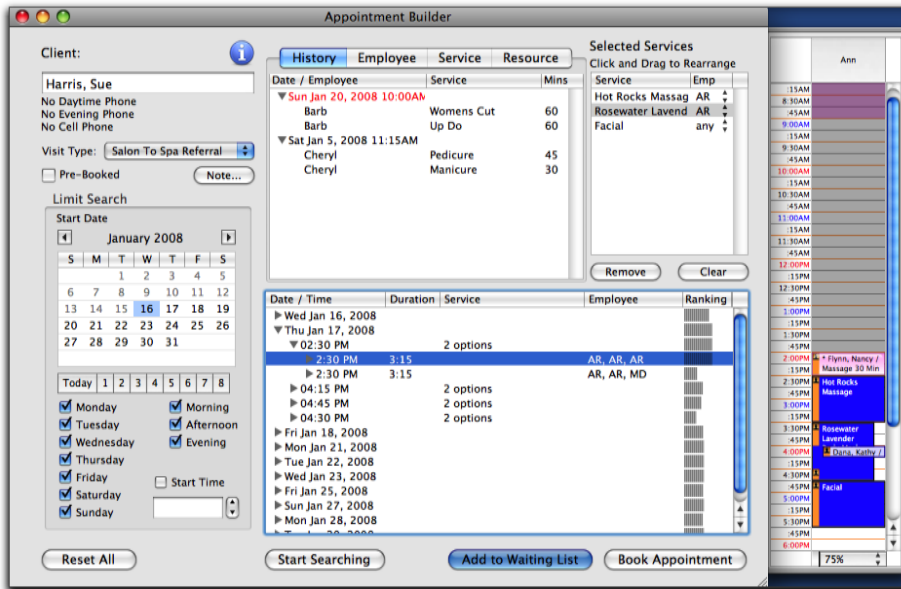

Once you have searched for the available dates and times and the client cannot come during any of those openings, click the **Add to Waiting List** button at the bottom of the search results and the appointment request will be added to the **Waiting List**. The *Appointment Builder* window will go away once the **Add to Waiting List** button is clicked.
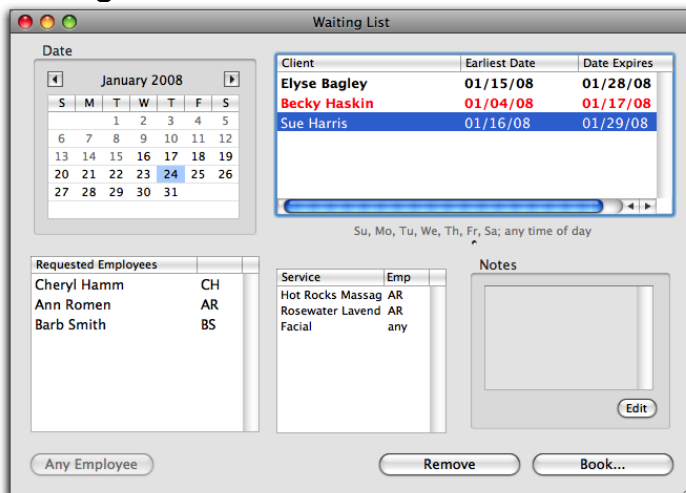
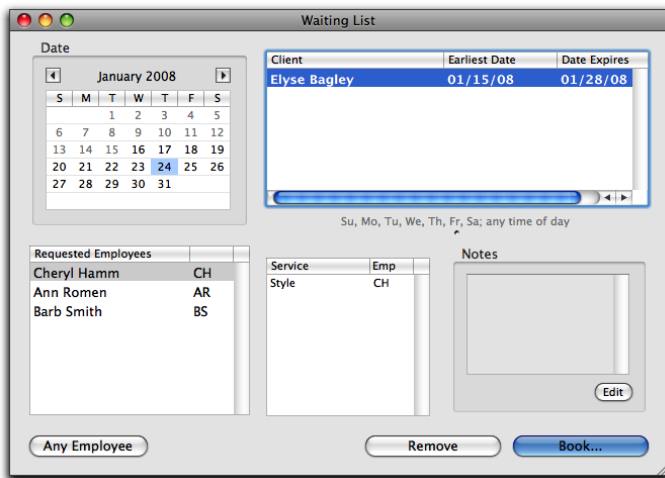The **Waiting List** will now show the appointment request you just added.

To see the details of the appointment request, open the **Waiting List** and highlight the **Client** name.

You can add an appointment note in the **Notes** field, you can edit the appointment note already present, you can **Remove** the request from the **Waiting List**, or you can choose to **Book** the appointment. The clients listed in **RED** indicate the appointment request has expired. You can choose to **Remove** the client from the **Waiting List**, or re-add them to the **Waiting List**.
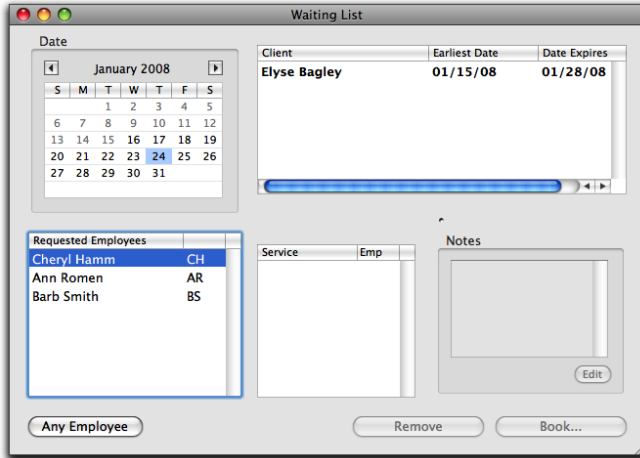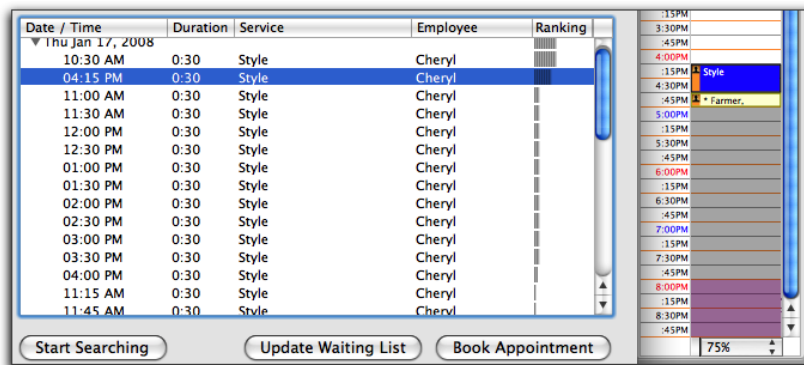
You can view an individual employee's appointment requests by highlighting the employee name in the **Requested Employees** area.

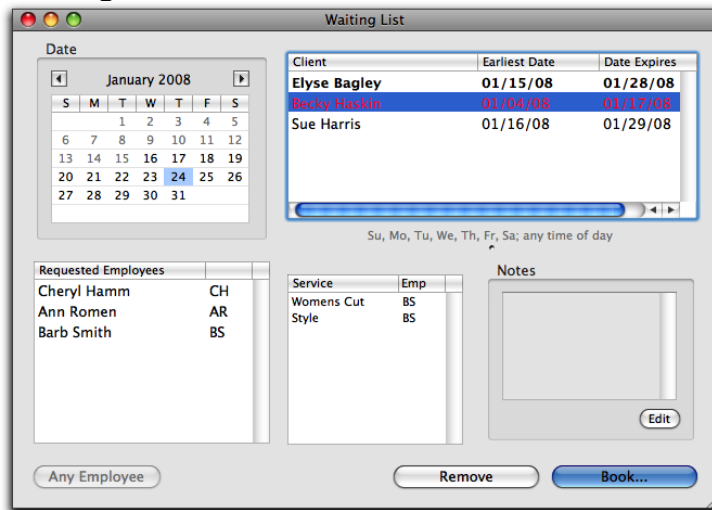To go back to all employees, click the **Any Employee** button.

To **Book** an appointment from the **Waiting List**, highlight the **Client** name and click the **Book** button.
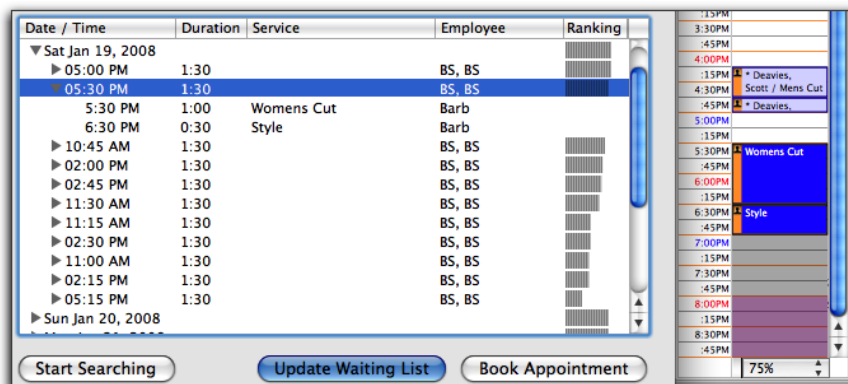

The *Appointment Builder* screen will open with the information about the appointment request already filled in. Click **Start Searching**, find the date and time the client wishes to come in, and click **Book Appointment**. The appointment request will be removed from the **Waiting List**.

If the search results still are not satisfactory for the client, simply **Close** the *Appointment Builder* screen and the appointment request will remain on the **Waiting List** untouched.

If you want to re-add an expired request back into the **Waiting List**, highlight the Client name and click the **Book** button.

The *Appointment Builder* screen will open with the information about the appointment request already filled in. Change the *Limit Search Calendar* to a different "starting" date, if necessary, and click **Start Searching**. If you do not see anything to fit the client's needs, click **Update Waiting List**, and the client will be re-added with a new expiration date.

It is recommended to keep the **Waiting List** minimized in the *Dock*. This allows easy access to the **Waiting List** if someone cancels his/her appointment and you wish to fill that spot with a client from the **Waiting List**.

To *Minimize* the **Waiting List**, click the 'yellow' gumdrop in the upper left corner of the **Waiting List** screen. To bring the **Waiting List** forward again, go to the *Dock* and click the **Waiting List** icon.
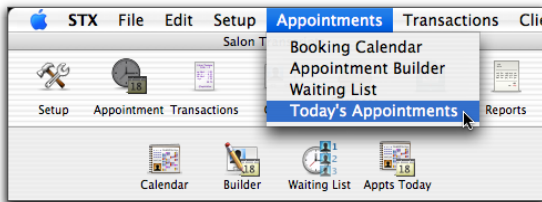
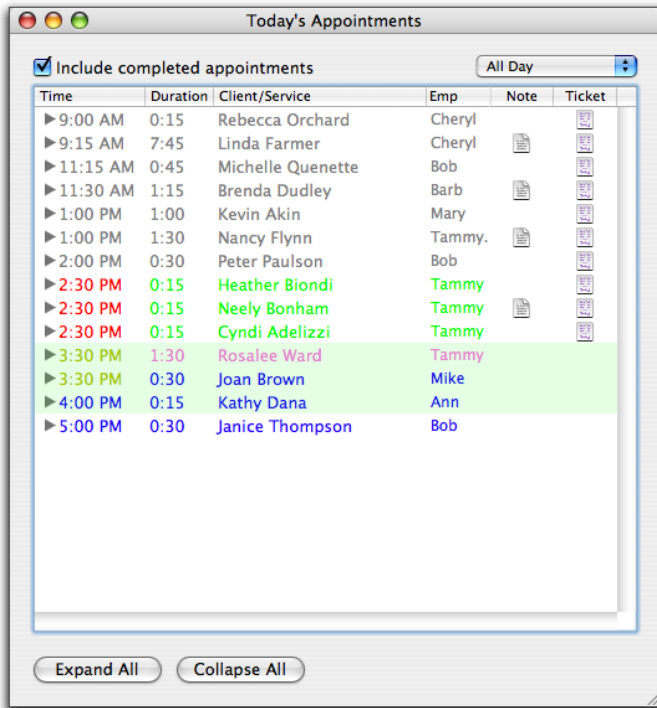# Appointments: Today's Appointments

Purpose

The **Appointments Today** feature shows all appointments booked just for 'today', for all employees combined.
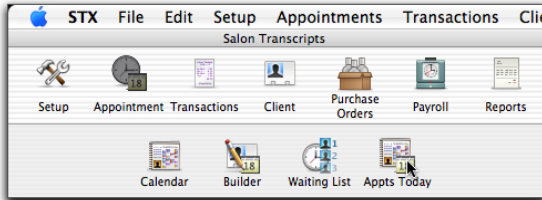

To open the **Appointments Today** screen, use the main toolbar and click *Appointments: Appts Today*.


Use the menu bar by going to *Appointments* and selecting the **Today's Appointments** option. The following is an example of what the **Today's Appointments** screen looks like.

Include Completed Appointments will show all clients who have paid for their ticket transaction and are gone. Check the box if you want to see the *Completed* appointments.
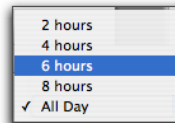
You can restrict the list to just 2 hours, 4 hours, 6 hours, 8 hours, or All Day by using the popup menu in the upper right hand corner.
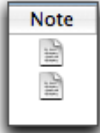
Appointments with the **Note** icon indicate the appointment has a note connected to it.

Double-click the **Note** icon to open the *Appointment Detail* screen where the note is located.

Appointments with the **Ticket** icon indicate the appointment has already been checked in, and a ticket transaction has already been created.

Double-click the **Ticket** icon to open the actual ticket that was created at the time the appointment was checked in.
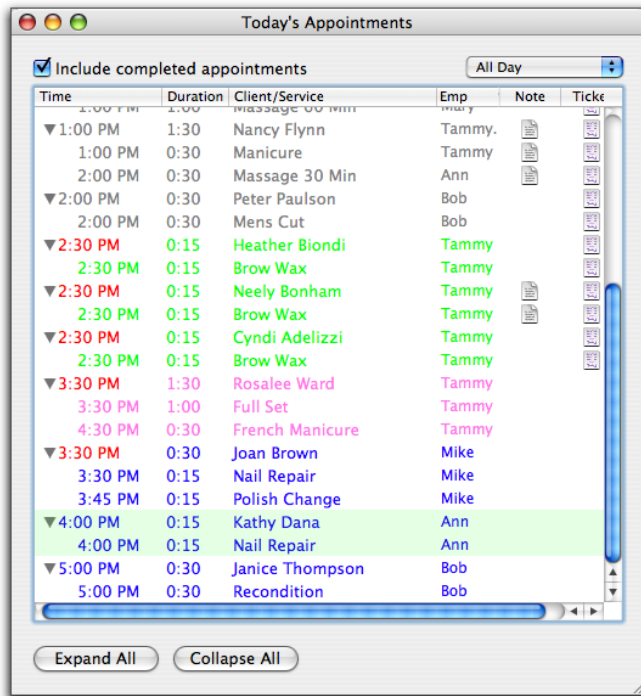

Appointments can be expanded or closed. Click the **Expand All** button to expand and see details of each appointment on the list.

The list of appointments will now open to show the details. Click the **Collapse All** button to close the details of each appointment on the list.


A light green color will show as a tint on the list for appointments both +/- 1 (one) hour from now, the 'current' time. In the following example, the appointment for Kathy Dana is within an hour of the current time.
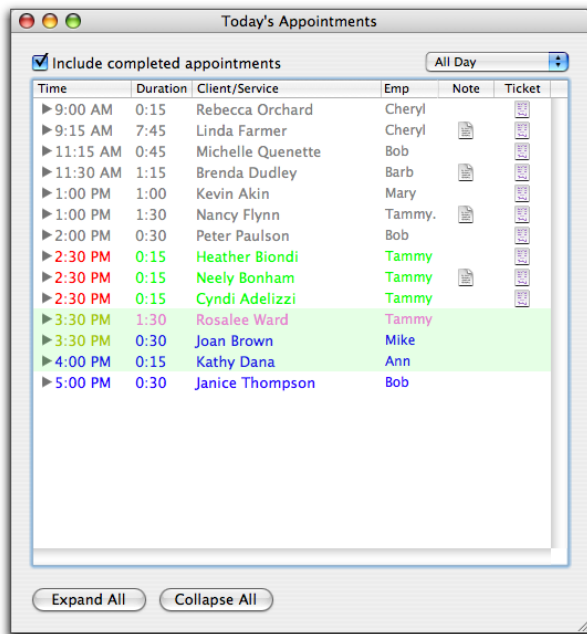
Color Codes for the **Time** column are as follows:

• **Dirty Yellow** (mustard) if the client has not checked IN within 15 minutes of the start time of his/her appointment.

• **Red** if the client has not checked IN within 30 minutes of the start time of his/her appointment.

• **Dirty Yellow** (mustard) if the client has not checked OUT within 15 minutes of the end time of his/her appointment.

• **Red** if the client has not checked OUT within 30 minutes of the end time of his/her appointment.

• The **Time** will be coded with the *Appointment Status* color if none of the above criteria apply.

• The color of each line is the *Appointment Status* color, aside from the time of the appointment, which could be one of the above.
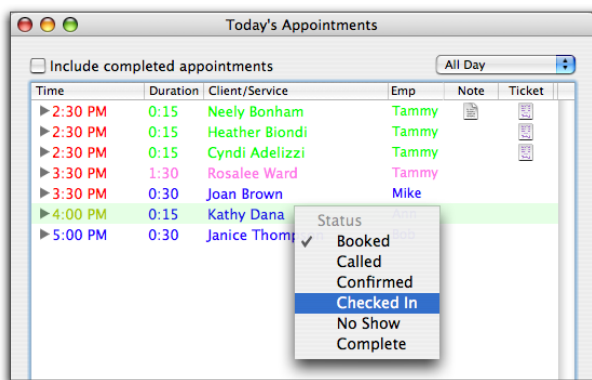
You can also change the *Appointment Status* directly from this screen. Hold the **Control (ctrl)** key down on your keyboard while clicking one time on an appointment you wish to change the **Status** for, also known as 'right-click'.

This will cause a **Contextual** menu to appear, allowing you to set the status immediately, without having to open any other screens or use any other keyboard commands.