stx

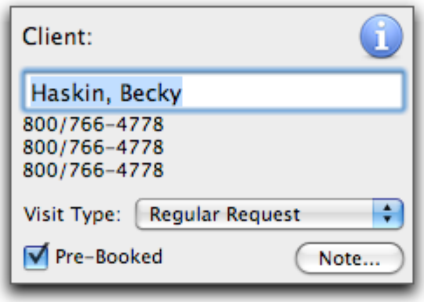
manage simply™

Pre-Booked Appointments

PRE-BOOKED APPOINTMENTS

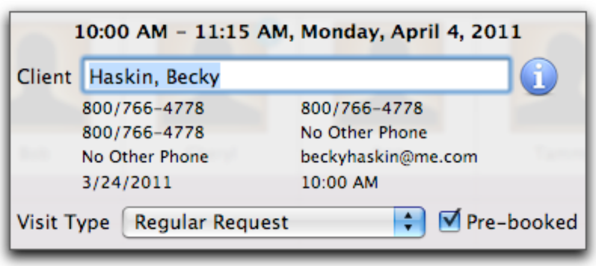
A **Pre-Booked** appointment is most often described as a new appointment being scheduled before the client leaves from the visit they had 'today'. When scheduling the client's next appointment, STX offers a way of tracking whether or not the appointment is **Pre-Booked**.

Appointment Builder



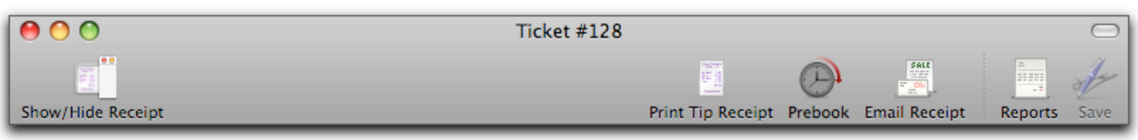
When scheduling a new **Pre-Booked** appointment using the *Appointment Builder*, check the **Pre-Booked** box.

Basic Booking



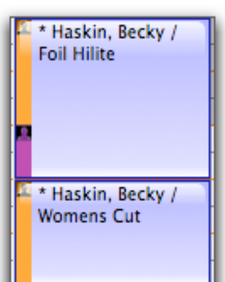
When scheduling a new **Pre-Booked** appointment using the *Basic Booking* method, check the **Pre-Booked** box.

Prebook Next Appointment



When using the **Prebook** icon from the toolbar on a *Client Visit* ticket transaction, the **Pre-Booked** box will automatically be checked on the appointment.

PRE-BOOKED APPOINTMENTS: APPEARANCE



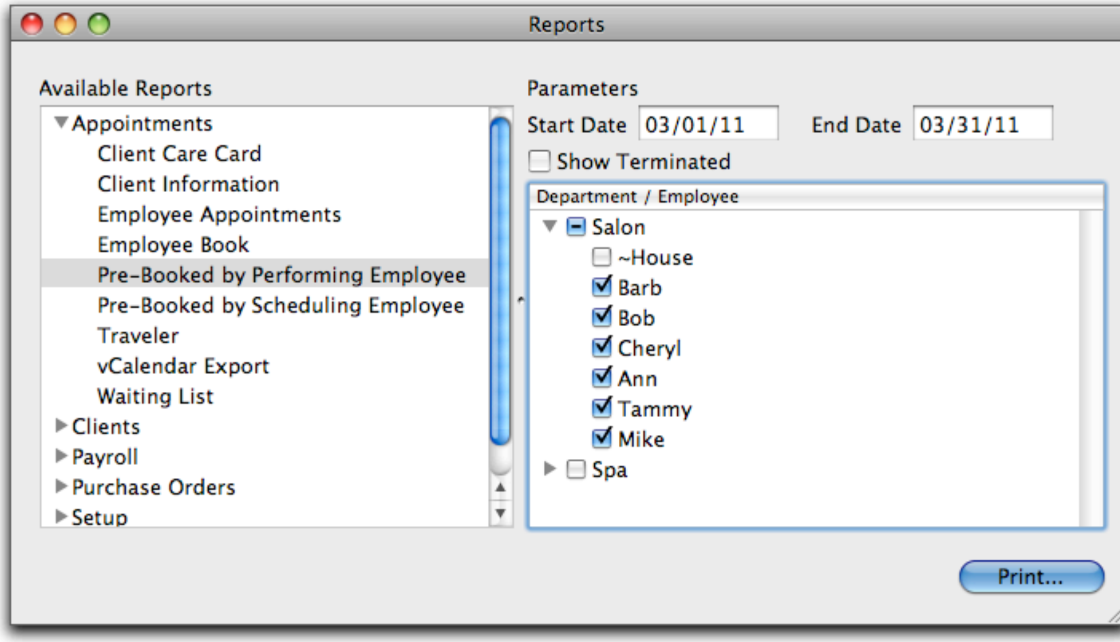
A **Pre-Booked** appointment will have a glossy appearance on the appointment calendar.

NOTE: An appointment scheduled online will automatically have a glossy appearance, but is not considered a **Pre-Booked** appointment.

REPORTS: APPOINTMENTS: PRE-BOOKED REPORTS

There are 2 reports in STX detailing the **Pre-Booked** appointments. The *Pre-Booked by Performing Employee* and *Pre-Booked by Scheduling Employee* reports can be found in Reports: Appointments. Each of these reports rely upon the **Pre-Booked** box being checked when scheduling a new appointment.

Pre-Booked by Performing Employee



The **Pre-Booked by Performing Employee** report will show pre-booked statistics for the employees *PERFORMING* the appointments scheduled on the appointment calendar during the day or date range for the report.

By Performing Employee

	By Date Created			By Date Of Appointment		
Employee	Appointments	Pre-Booked	Standing	Appointments	Pre-Booked	Standing
Barb	6	1 17%	5 83%	39	4 10%	
Bob				41	1 2%	
Cheryl				49	11 22%	
Ann	5		5 100%	31	7 23%	
Tammy	1			38	8 21%	
Mike	1	1 100%		41	12 29%	
Sue	2	1 50%		5		
Mary	1	1 100%		11	1 9%	

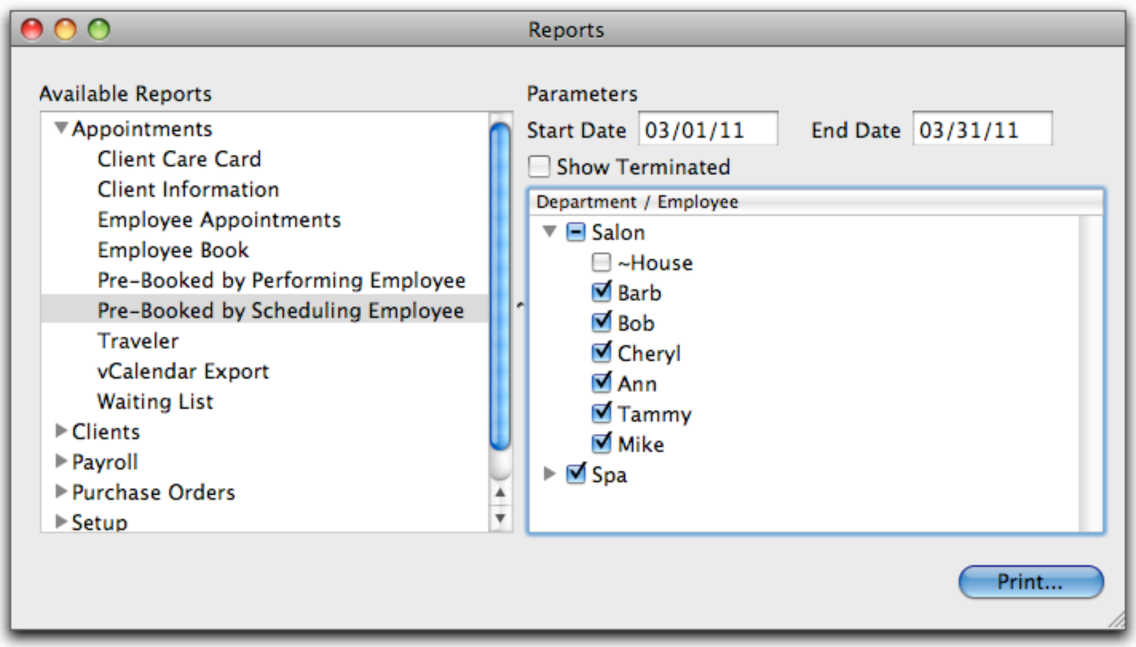
This report shows Barb had 6 appointments *created* for her, meaning during the month of March, approximately 6 clients scheduled a new appointment. This also shows Barb had 39 appointments physically on the appointment calendar during the month of March.

By Date Created shows the appointments that were created for the employee during the time frame you chose for the report to be printed. It is broken down as to how many of those appointments *created* for the employee were pre-booked, and how many of those appointments were standings. This has nothing to do with what is physically on the calendar - it is the appointments that were created during the date range of the report.

For example, you print the report for all of March. On March 14th, Jane Doe called and wanted to make an appointment with Barb (employee) for April. 4th. The appointment just booked was CREATED on March 14th and will therefore show on the report under **By Date Created**.

By Date of Appointment looks at the calendar for the date(s) the report is printed for and shows how many appointments are on the calendar (including canceled appointments) for each employee performing the services. It is broken down as to how many of those were pre-booked and how many were standings. This has nothing to do with when the appointments were created – it is the appointments showing on the appointment calendar during the date range of the report.

Pre-Booked by Scheduling Employee



The **Pre-Booked by Scheduling Employee** report will show pre-booked statistics for the employees who actually *SCHEDULED* the appointments on the appointment calendar during the day or date range for the report.

By Scheduling Employee

Employee	By Date Created			By Date Of Appointment		
	Appointments	Pre-Booked	Standing	Appointments	Pre-Booked	Standing
Owner	9	2 *22%*	5 *56%*	214	34 *16%*	

This report shows the OWNER created 9 new appointments, meaning during the month of March, approximately 9 clients scheduled a new appointment. This also shows the OWNER scheduled 214 appointments physically on the appointment calendar during the month of March.

By Date Created shows the appointments that were created during the time frame you chose for the report to be printed, and which employee *created* them. It is broken down as to how many of those appointments *created* were pre-booked, and how many of those appointments were standings. This has nothing to do with what is physically on the calendar or which employee will be performing the services - it is the appointments that were created during the date range of the report.

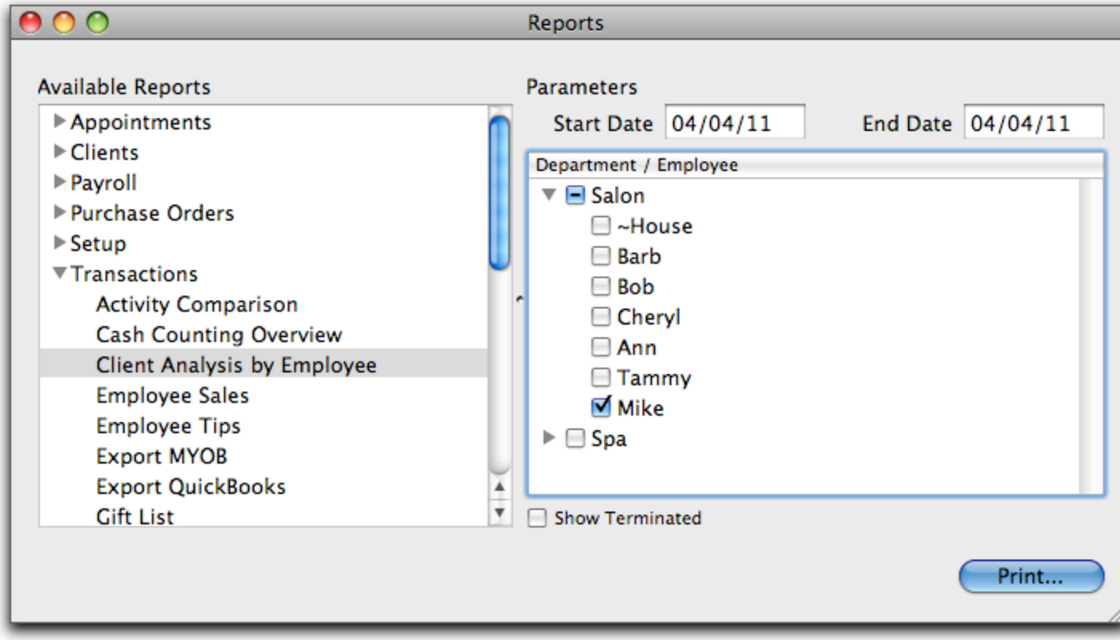
For example, you print the report for all of March. On March 14th Jane Doe called and wanted to make an appointment with Barb (employee) for April. 4th. The appointment just booked was CREATED on March 14th and will therefore show on the report under **By Date Created**, and listed for the scheduling employee.

By Date of Appointment looks at the calendar for the date(s) the report is printed for and shows how many appointments are on the calendar (including canceled appointments) and which employee created them in the first place. It is broken down as to how many of those were pre-booked and how many were standings. This has nothing to do with when the appointments were created or which employee will be performing the services - it is the appointments showing on the appointment calendar during the date range of the report.

REPORTS: TRANSACTIONS: CLIENT ANALYSIS BY EMPLOYEE

The **Client Analysis by Employee** report can be found by going to *Reports: Transactions*. This report is another way of seeing how many clients are pre-booking their next appointment. The report does NOT rely upon the **Pre-Booked** box being checked when scheduling a new appointment.

The **Client Analysis by Employee** report prints one page per employee and shows the % of rebooked appointments, as well as other information during the time period of the report.



The **Client Analysis by Employee** report can be printed for any day or date range, for all or any Department / Employee. Terminated employees can be selected by checking the **Show Terminated** checkbox.

Client Analysis by Employee

Date	Client Traffic Breakdown Total	Established	New	Referrals	Rebooked	Revenue Total	Revenue Service	Revenue Retail	Per Client Total	Per Client Service	Per Client Retail	Man Hours	Clients / Hour	Total Services	Services / Client	Total Products	Products / Client
04/04/11	1	1 100%	0 0%	0 0%	1 100%	$ 160.00	$ 160.00	$ 0.00	$ 160.00	$ 160.00	$ 0.00	9.00	0.11	3	3.00	0	0.00
Total	**1**	**1 100%**	**0 0%**	**0 0%**	**1 100%**	**$ 160.00**	**$ 160.00**	**$ 0.00**	**$ 160.00**	**$ 160.00**	**$ 0.00**	**9.00**	**0.11**	**3**	**3.00**	**0**	**0.00**

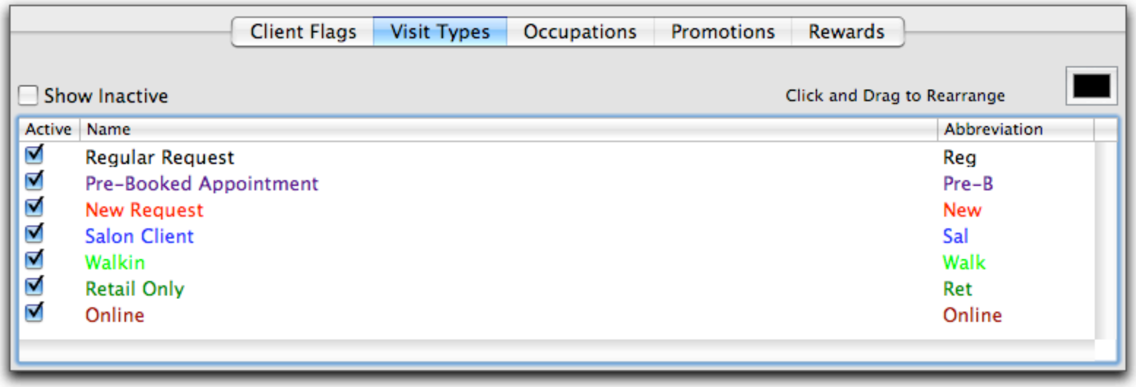
A client has to have had a *Client Visit* ticket transaction AND scheduled a future appointment on the same day in order to be considered as part of the **Rebooked** total. In this case, the one client for the day also pre-booked their next appointment.

The following information is also detailed on the **Client Analysis by Employee** report.

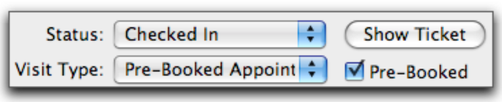
Date – Date(s) specific for when the report is printed.
Client Traffic Breakdown – Includes **Total** number of clients, **Established** number of clients, number of **New** clients, and number of based on **Referrals**.
Revenue – Includes **Total** revenue with **Service** and **Retail** breakdowns.
Per Client – Includes **Total** revenue with **Service** and **Retail** breakdowns.
Man Hours – Total number of hours the employee worked.
Clients / Hour – Average of clients seen by the employee per hour.
Total Services – Total number of services performed by the employee.
Services / Client – Average number of services per client.
Total Products – Total number of products sold by the employee.
Products / Client – Average number of products purchased per client.

VISIT TYPES: PREBOOKED

Creating a new *Visit Type* called **Pre-Booked Appointment** will allow you to track sales income from clients who pre-book appointments.



Go To *Setup: Marketing: Visit Types* to create the new **Pre-Booked Appointment** visit type. Use the visit type on each appointment considered as *Pre-Booked*.

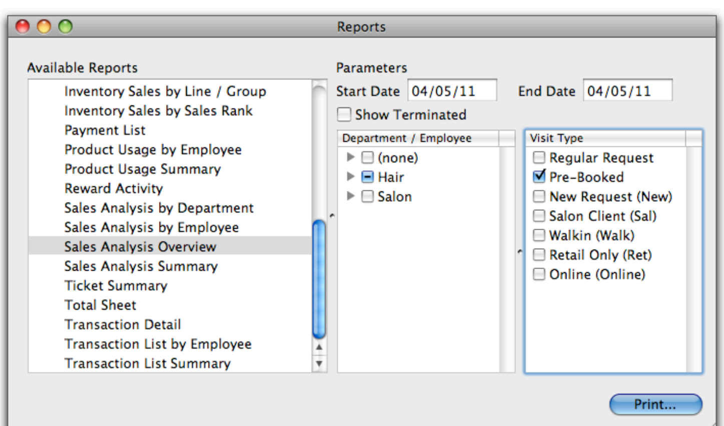


Each time the *Pre-Booked* appointment is checked in, the visit type on the ticket will also be **Pre-Booked Appointment**.

VISIT TYPES: REPORTS

Several of the STX reports detail sales information by *Visit Type*.

• Sales Analysis by Department
• Sales Analysis by Employee
• Sales Analysis Overview
• Sales Analysis Summary
• Ticket Summary
• Total Sheet



The report **Sales Analysis Overview**, found in the *Transactions* list of reports, will specifically detail the sales income based on the client *Visit Type*.

Sales Analysis Overview

Employee	Reg	Pre-B	New	Sal	Walk	Total Service	Retail	Client Visits	Retail per Visit
	Services by Visit Type								
Brenda		2	2			$ 270.00		2	
Ronny	1					$ 20.00		1	
Ryan				1		$ 100.00		1	
Roger		1			1	$ 30.00		2	
Candice		2				$ 130.00		1	
Michael Jon		1				$ 100.00		1	
Total	**1**	**6**	**2**	**1**	**1**	**$ 650.00**	**$ 0.00**	**8**	**$ 0.00**

The **Sales Analysis Overview** report is an evaluation of the total retail and service performance, as well as customer visit types. The report is broken down by employee and shows the number of services per visit type, total service and retail sales amounts, how many tickets (Client Visits), and a retail sales amount per ticket (Client Visit).

Because the report is broken down by *Visit Type*, it is easy to see the income generated from the **Pre-Booked Appointment** visit type.

VISIT TYPES: REWARDS

The **Rewards** module allows you to award points to clients based on different criteria. One of its many features is the ability to award points based on *Visit Type*.

Client Flags | Visit Types | Occupations | Promotions | Rewards

☐ Show Inactive   Drag to Rearrange

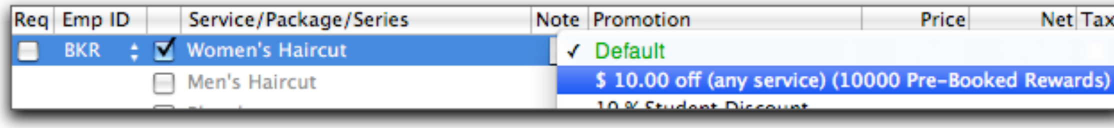
Active	Name
☑	Online Services Rewards
☑	Pre-Booked Rewards

Rules	Description
Spending (services)	Award 100 Pre-Booked Rewards points for every dollar spent on services where visit type is Pre-Booked Appointment.
Spending (products)	Award 100 Pre-Booked Rewards points for every dollar spent on products where visit type is Pre-Booked Appointment.
Spending (gifts)	Award 100 Pre-Booked Rewards points for every dollar spent on gifts where visit type is Pre-Booked Appointment.
$ 10.00 off (any product)	Redeem 10,000 Pre-Booked Rewards points for $10 off of any product.
$ 10.00 off (any service)	Redeem 10,000 Pre-Booked Rewards points for $10 off of any service.

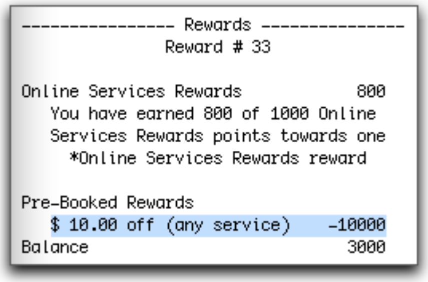
In this example, we are awarding 100 points for every dollar spent on services, products and/or gifts where the visit type is **Pre-Booked Appointment**. When the client accumulates 10,000 points, they will be able to redeem them for a $10 discount on either a service or a product.

```
---------------- Rewards ---------------
              Reward # 33

Online Services Rewards              800
   You have earned 800 of 1000 Online
   Services Rewards points towards one
     *Online Services Rewards reward

Pre-Booked Rewards
   Spending (services)            +13000
Balance                            13000
```

The *Client Visit* ticket receipt shows how many points were earned. In this example, the client spent $130 in services, earning 13,000 points.

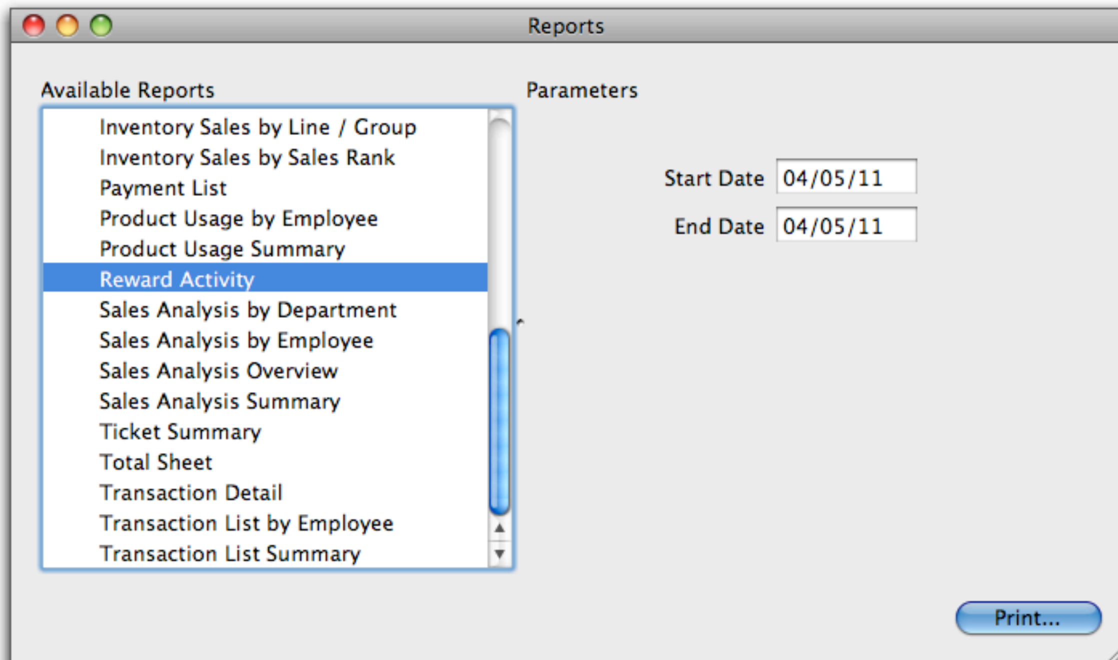


When the client has enough points to redeem, the **Promotion** popup menu for **Default** appears in a larger **green** font. The change in the word **Default** indicates there are *Rewards* points available for redemption.

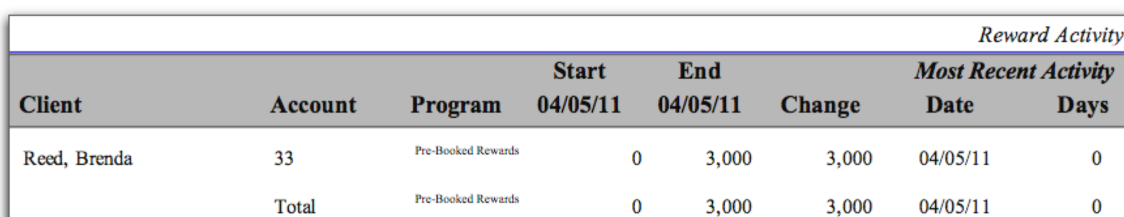


```
--------------- Rewards ---------------
             Reward # 33

Online Services Rewards              800
   You have earned 800 of 1000 Online
   Services Rewards points towards one
     *Online Services Rewards reward

Pre-Booked Rewards
   $ 10.00 off (any service)      -10000
Balance                             3000
```

Once the points are redeemed, the *Client Visit* ticket receipt shows how many points were deducted. In this example, the client used 10,000 of the 13,000 awarded points.



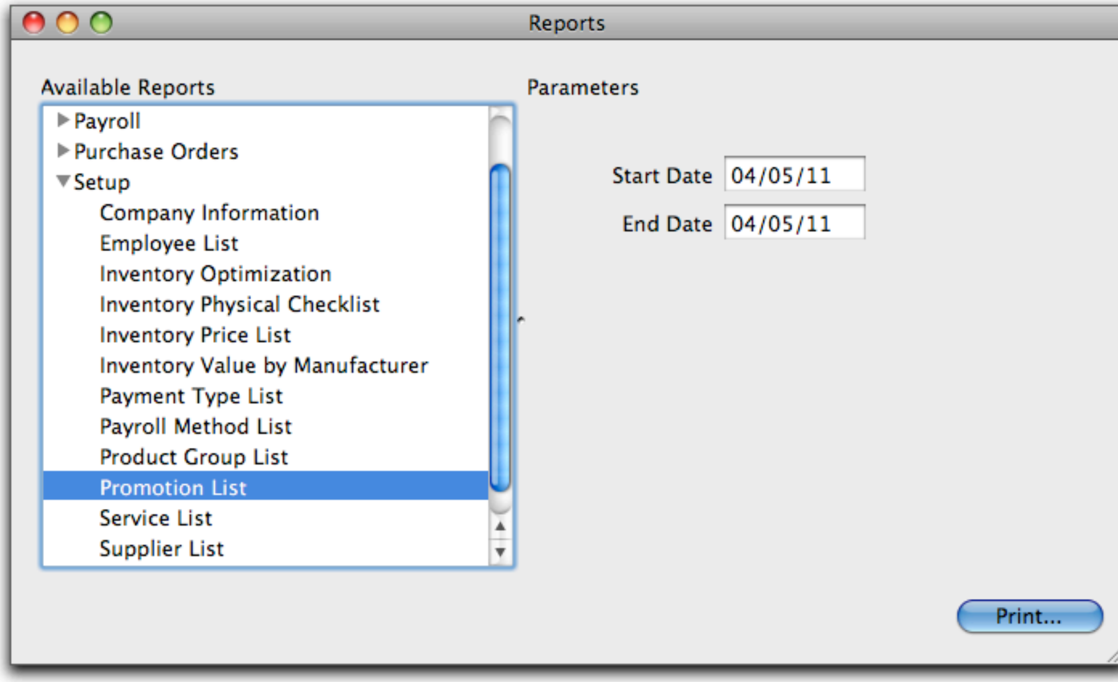
Go to *Reporting: Reports: Transactions* to view the **Reward Activity** report.



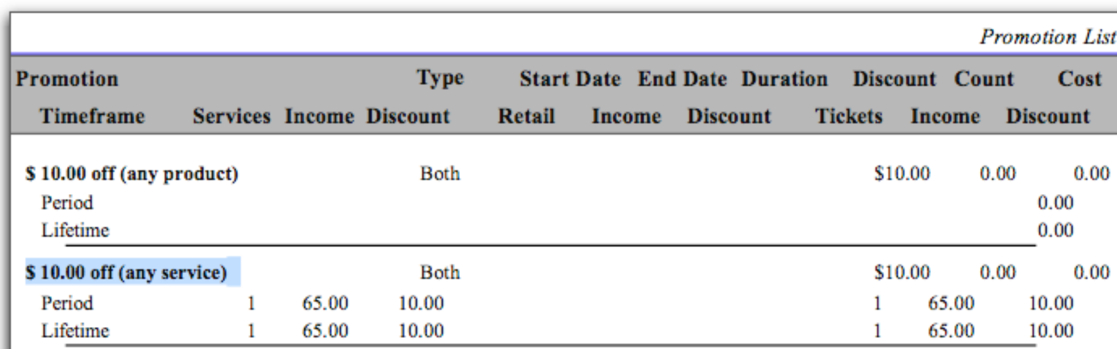
Reward Activity

Client	Account	Program	Start 04/05/11	End 04/05/11	Change	*Most Recent Activity* Date	Days
Reed, Brenda	33	Pre-Booked Rewards	0	3,000	3,000	04/05/11	0
	Total	Pre-Booked Rewards	0	3,000	3,000	04/05/11	0

The **Reward Activity** report shows which reward programs had activity and shows each client's point balances during the period of the report.



Go to *Reporting: Reports: Setup* to view the **Promotion List** report. Because the reward redemption is actually a 'promotion' used on the *Client Visit* ticket transaction, the activity of using the promotion will be detailed on the **Promotion List** report.



Promotion List

Promotion			Type	Start Date	End Date	Duration	Discount	Count	Cost
Timeframe	Services	Income	Discount	Retail	Income	Discount	Tickets	Income	Discount
$ 10.00 off (any product)			Both				$10.00	0.00	0.00
Period									0.00
Lifetime									0.00
$ 10.00 off (any service)			Both				$10.00	0.00	0.00
Period	1	65.00	10.00				1	65.00	10.00
Lifetime	1	65.00	10.00				1	65.00	10.00

The **Promotion List** report totals the discounts taken due to *Reward* redemption, and whether the discounts were applied to services and/or products. In this example, after a $10 discount, the overall ticket income was $65.

For more information regarding the **Rewards** module, please contact our Sales Department by calling 800.766.4778, ext. 1, or by sending an email to sales@stxsoftware.com.