

How to Use: Standing Appointments

The standing appointment feature is used to book the same appointment at the same time interval many times. A good example would be a client who comes in every 3 weeks to get their hair cut. Instead of booking the appointment individually each time this option will book the appointment up to 256 times for you at the time interval you select (each day, every other day, each week, every other week etc.). You can also set it to become an "Auto-Standing" appointment, this would make it so each time the appointment is checked out another appointment is booked automatically so the appointment will always be booked.

1.) To get to the standing appointments screen go to your appointment book and click “Standing Appts”

Scarborough Day Spa [7-16010] Version 9.6.2 Thursday, 08/04/2016 09:52 AM

Sales Appointments Clients Inventory Reports Other Utilities Set-up Info Clear Password Exit

Sales Book Clients Inventory Reports Payroll Live Chat

APPOINTMENTS FOR THURSDAY, AUGUST 4, 2016

Wait List Forward Month View Multi-Book Standing Appts Pkg Manager Clients Clear Password Exit

Group PEDICURES Service Time Unlock Reschedule

DANIELLE

STANDING APPOINTMENTS

Client [?] Show

Technician [?] Request Type [?] Book

Service [?] Service Time [?] Cancel

Print

Start Date [08/04/16] Cal Thursday Auto-Standing +

Time of Day [08:00A]

Frequency [?] # of Visits [?]

Date	Time	Status	Technician	Service
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2.) In this screen select your client, service provider, service, request type, starting date, starting time, frequency, and the number of times you would like it booked. Remember, if you would like the appointment to continue to be automatically booked leave “Auto-Standing” selected in blue, if not make sure “Auto-Standing” is disabled by unchecking it so it shows in gray.

STANDING APPOINTMENTS

The screenshot shows a software interface for creating standing appointments. The interface is divided into several sections:

- Client Information:** Client ID 69862, Client Name Aaliah Parker, Technician DANIELLE, and Service mani french w/art.
- Request Details:** Request Type Request and Service Time 45 Mins.
- Appointment Parameters:** Start Date 08/05/16, Time of Day 10:00A, Frequency Every 2 Weeks, and # of Visits 10 (Last 12/09/16).
- Day:** Friday
- Buttons:** Show, Book, Cancel, Print, and Auto-Standing +.

Date	Time	Status	Technician	Service
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- 3.) Once you have your parameters selected take note of the “Last” date near the “# of visits” this is the last day the appointment will be booked. The next step is to click “Show”, when you do this a list of the bookings will appear in the window below. It’s important to take note of the “Status” column, if the status shows “OK” then the appointment will book at that time, if the status shows “XX” that means that there is a booking conflict (either they aren’t scheduled at that time or something is already booked

there) and the appointment cannot be booked as is.

STANDING APPOINTMENTS

Client 69862
Aaliah Parker ?
Technician 17 DANIELLE
Service 2 mani french w/art
Request Type Request
Service Time 45 Mins

Start Date 08/05/16 Friday
Time of Day 10:00A
Frequency Every 2 Weeks # of Visits 10 Last 12/09/16

Buttons: Show, Book, Cancel, Print, Auto-Standing +

Date	Time	Status	Technician	Service	
Friday	08/05/16	10:00A	OK	DANIELLE	mani french w/art
Friday	08/19/16	10:00A	XX	DANIELLE	mani french w/art
Friday	09/02/16	10:00A	OK	DANIELLE	mani french w/art
Friday	09/16/16	10:00A	OK	DANIELLE	mani french w/art
Friday	09/30/16	10:00A	OK	DANIELLE	mani french w/art
Friday	10/14/16	10:00A	OK	DANIELLE	mani french w/art
Friday	10/28/16	10:00A	OK	DANIELLE	mani french w/art
Friday	11/11/16	10:00A	OK	DANIELLE	mani french w/art
Friday	11/25/16	10:00A	OK	DANIELLE	mani french w/art

4.) If you see a status of “XX” you can click on that line item and two new options will appear, those are “Alternate Op” (service provider) and “Alternate Times”. These will allow you to change that specific booking to either a new time if the client doesn’t mind or to a different service provider if the client is unable to come in at a different time. When changed the status will update to “Alt” indicating you have resolved the

booking conflict.

STANDING APPOINTMENTS

Client 69862
Aaliah Parker ?

Technician 17
DANIELLE

Service 2
mani french w/art

Request Type
Request

Service Time
45 Mins

Show

Book

Cancel

Print

Start Date + - Cal
08/05/16 **Friday**

Auto-Standing +

Time of Day
10:00A

Alternate Op
▼

Frequency Every 2 Weeks # of Visits 10 Last 12/09/16

Alternate Times
▼

Date	Time	Status	Technician	Service
Friday 08/05/16	10:00A	OK	DANIELLE	mani french w/art
Friday 08/19/16	10:30A	ALT	DANIELLE	mani french w/art
Friday 09/02/16	10:00A	OK	DANIELLE	mani french w/art
Friday 09/16/16	10:00A	OK	DANIELLE	mani french w/art
Friday 09/30/16	10:00A	OK	DANIELLE	mani french w/art
Friday 10/14/16	10:00A	OK	DANIELLE	mani french w/art
Friday 10/28/16	10:00A	OK	DANIELLE	mani french w/art
Friday 11/11/16	10:00A	OK	DANIELLE	mani french w/art
Friday 11/25/16	10:00A	OK	DANIELLE	mani french w/art

- 5.) When all of your booking conflicts have been resolved the last step is to click the “Book” button. When you click “Book” the list below will clear out and a confirmation window will appear letting you know your

appointments have been booked.

STANDING APPOINTMENTS

Client 69862
Aaliah Parker ?

Technician 17
DANIELLE

Service 2
mani french w/art

Request Type
Request

Service Time
45 Mins

Show

Book

Cancel

Print

Start Date 08/05/16 Cal Friday

Time of Day 10:00A

Auto-Standing +

Alternate Op

Frequency Every 2 Weeks # of Visits 10 Last 12/09/16

Alternate Times

Date Complete

Appointments have been booked

OK