

## Appointment Book- Using the Wait List

If a client requests an appointment time or time frame that is already booked the Wait List feature in your appointment book allows you to put the client in a waiting list in case one of those requested times becomes free. Follow the directions below to learn how it works.

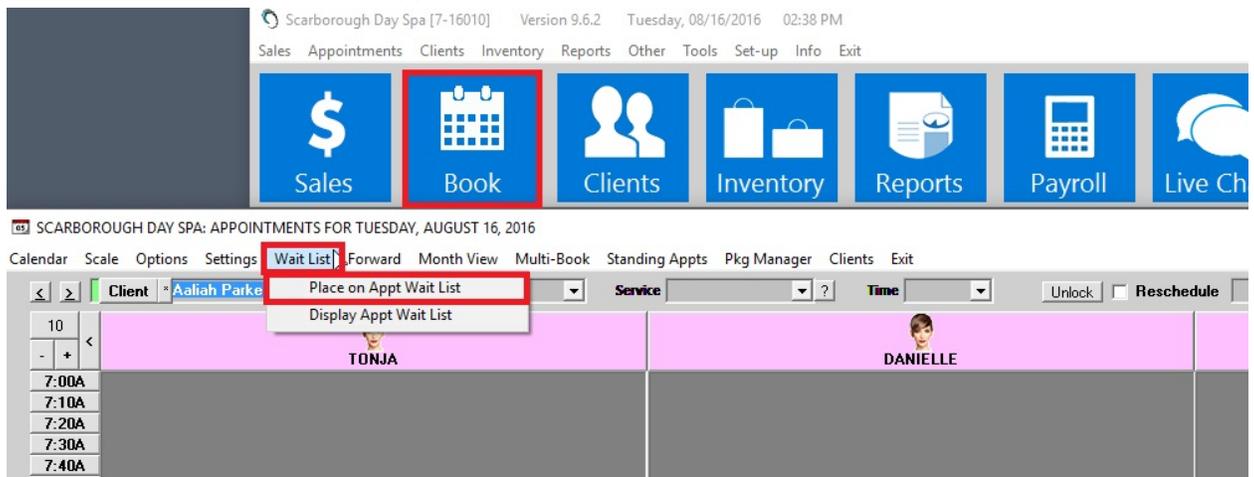
**Before we begin:** There are two preferences that can work in conjunction with the Wait List that you may want to turn on. They are located under Setup>Preferences>Appointments and are called “Auto-remove from Wait List if Booked within Date range” and “Check Waiting List at Time of Unbooking”. The “Auto –remove” preference will remove the waiting client from the Wait List if the service is manually booked for that client within the time frame requested. The second preference will notify you if you a unbook an appointment that meets the waiting client’s requested times and ask if you would like to book it now.

APPOINTMENT SETTINGS

<p><b>Day/Week View Screen Options</b></p> <ul style="list-style-type: none"><li><input type="checkbox"/> Show Only Those Working</li><li><input type="checkbox"/> Auto-format column width based on Group</li><li><input type="checkbox"/> Auto-set view time in Day View</li><li><input type="checkbox"/> Use Xs instead of color bar to indicate checkins/checkouts</li><li><input type="checkbox"/> X All Client Appointments on Check-Out</li><li><input type="checkbox"/> Auto-Show Long Service Descriptions (If Note field not blank)</li><li><input type="checkbox"/> Display Name By First Name First</li></ul> <p><b>Booking Options</b></p> <ul style="list-style-type: none"><li><input type="checkbox"/> Auto-book Room if Only One Available</li><li><input type="checkbox"/> Give Option to Book Even if No Room or Op Available</li><li><input type="checkbox"/> Always Use First Available Room without a Prompt</li><li><input type="checkbox"/> Check for Appointments Already Booked</li><li><input type="checkbox"/> Prompt for No-Show only if past appointment scheduled time</li><li><input type="checkbox"/> Always use Package Times in Multi-Book</li><li><input type="checkbox"/> Warn if Trying to Book Prior to Current Date</li><li><input type="checkbox"/> Do not allow Booking for Past Date</li><li><input type="checkbox"/> Enable Prompt for Late Charge for Appointment Cancellation</li><li><input type="checkbox"/> Auto-Unbook if Marked as No-Show</li><li><input checked="" type="checkbox"/> Auto-remove from Wait List if Booked within Date Range</li><li><input checked="" type="checkbox"/> Check Waiting List at Time of Unbooking</li></ul> <p><b>Other Options</b></p> <ul style="list-style-type: none"><li><input type="checkbox"/> Enable Appointment Logging</li><li><input type="checkbox"/> Log Unbooked Appointments</li><li><input type="checkbox"/> Do not auto-show appointment notes</li><li><input type="checkbox"/> Set Auto-Standing to be checked by default in Standing Appointments</li><li><input type="checkbox"/> Auto-Delete Appointments from Waiting List if Booked or Expired</li></ul>	<p><b>Travel Card Options</b></p> <ul style="list-style-type: none"><li><input type="checkbox"/> Print (2) formulas/Service on TravelCard</li><li><input type="checkbox"/> Print Sequential Numbers on TravelCard</li><li><input type="checkbox"/> Print TravelCard in Split Format (1/2 page)</li></ul> <p><b>Client Info Confirmations</b></p> <ul style="list-style-type: none"><li><input type="checkbox"/> Confirm Clients Phone # After Booking</li><li><input type="checkbox"/> Confirm Address Phone and Email when booking</li><li><input type="checkbox"/> Check Gender Requirements when Booking</li></ul> <p><b>Booking Requirements</b></p> <ul style="list-style-type: none"><li><input type="checkbox"/> Require Address and Phone</li><li><input type="checkbox"/> Require Phone</li><li><input type="checkbox"/> Require Email Address</li><li><input type="checkbox"/> Require Credit Card to be On File</li><li><input type="checkbox"/> Allow Credit Card Requirement Over-ride</li></ul> <p><b>Report Options</b></p> <ul style="list-style-type: none"><li><input type="checkbox"/> Dont Print Phone #s on Appointment Listing</li><li><input type="checkbox"/> Dont Print Operator on Client Appt List</li></ul> <p><b>Sales Register Options</b></p> <ul style="list-style-type: none"><li><input type="checkbox"/> Sort Current Appointments by Checkout Order</li><li><input type="checkbox"/> Charge if Attribute Present at POS</li></ul>
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Save

**1.) Go to Book>Wait List>Place Appt on Wait List**



**2.) In this screen select your Client, Operator (or “Any Operator”), Service, the date or date range the client would like the appointment booked, the days of the week that they can do it on (If it’s a date range), and the times the client is available. You can even put a note on the entry if any special instructions are necessary. When you are done click the “Save” option.**

PLACE ON APPOINTMENT WAITING LIST

**Client**  69862

**For Operator**

**For Service**

**Effective Date Range**

**From**  **To**

**Acceptable Days of the Week**

S	M	T	W	T	F	S
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

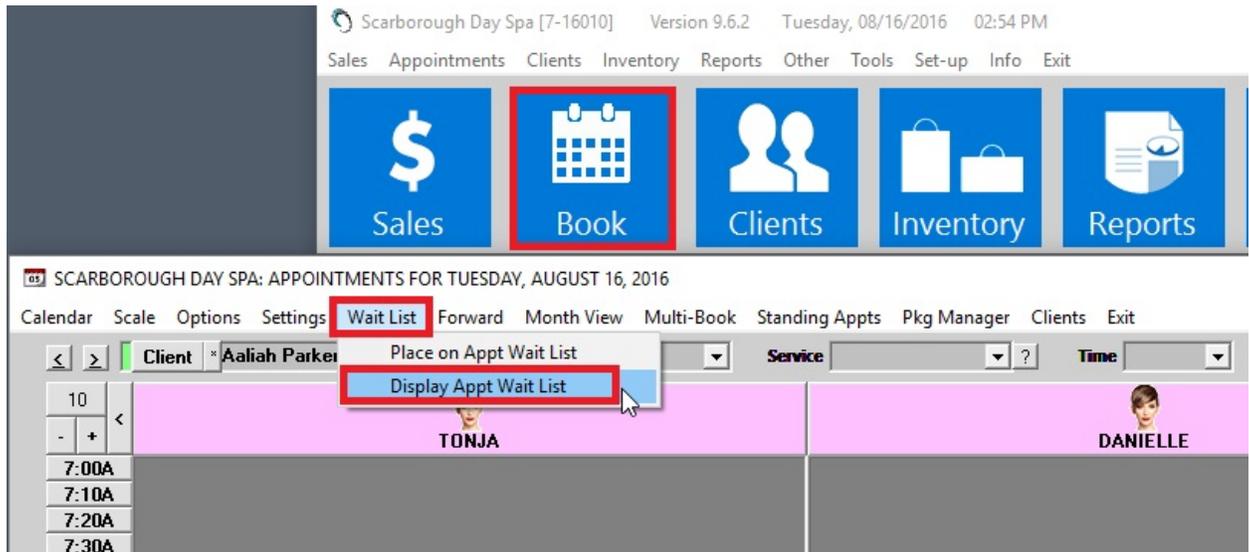
**Start Time**   AM  PM

**End Time**   AM  PM

**Note:**

**Save** **Cancel**

- 3.) At any time you can view, modify, and delete your Wait List entries. To do this go to **Book>Wait List>Display Appointment Wait List**



- 4.) In this screen you can view all of your Wait List entries or view requests for a specific service using the "Display for Service" dropdown menu. When you select a specific entry the information for the entry will appear below, in here you can make any modifications to the entry that you need to, when you are done hit the "Update" button. If there is an entry that is no longer necessary select it and hit the "Remove" button. If you need to pull up the client's information click the "Info" button.

WAITING LIST

Display for Service: **All Services** [v]

Search Remove Update Close

Waiting List

app FR w/art [DANIELLE] Aaliah Parker (08/16/16-08/25/16)

**Aaliah Parker** Info Phone: 2079372479

S	M	T	W	T	F	S	From Date	To Date	Start Time	End Time	Status
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	08/16/2016	08/25/2016	8:00A	12:00P	OK

Note:  
Your note here

- 5.) If you have the preference and “Check Waiting List at Time of Unbooking” checked off then the appointment book will notify you if the time you just unbooked fits the Wait List entry you have for a client. It will also give you the option to book it on the notification. If you do book it then it will remove it from the Wait List.

OPENING AVAILABLE

This following is a Waiting List request. Do you want to book it?

Aaliah Parker

app FR w/art 2079372479

08/16/2016

3:10P

Yes

Cancel

Find Another Time

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