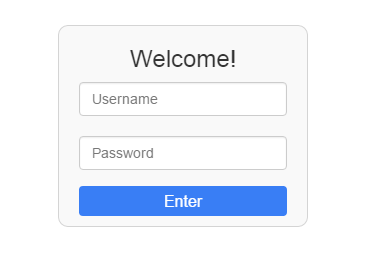
## Scheduling Application Manual

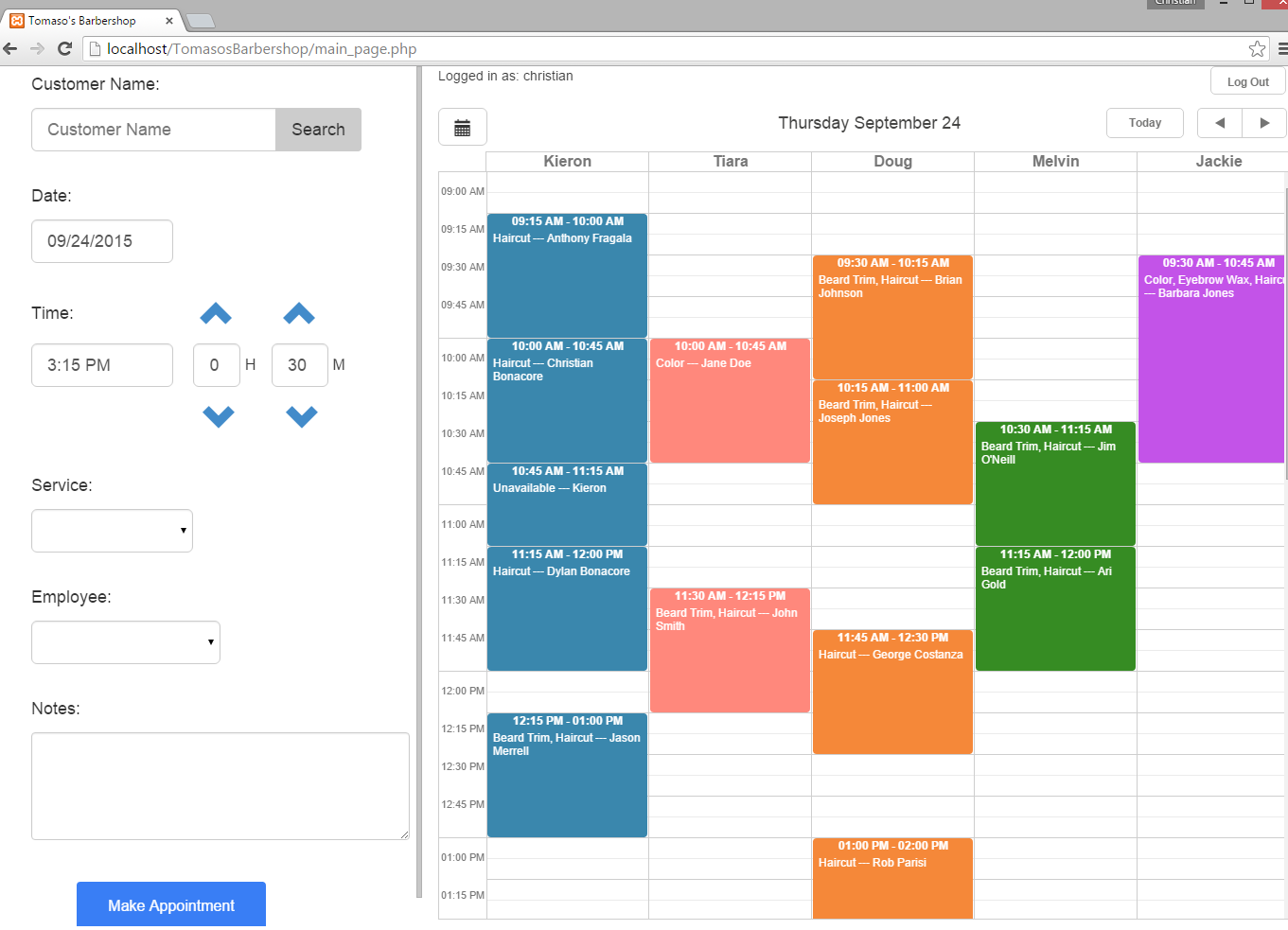
This document serves as a manual for the scheduling application used by employees at Tomaso’s Barbershop. This document explains basic functionality, and “how-tos” of the application. Any questions not answered in this document can be directed to Christian Bonacore.

This is a web-based application, meaning it is used by opening a web browser (Safari, Google Chrome, Firefox, etc.) and accessing the application from an address. The application can be accessed from either a desktop computer, or mobile device such as a smartphone or tablet.

Upon opening the application, you will be brought to the login page, as shown below:

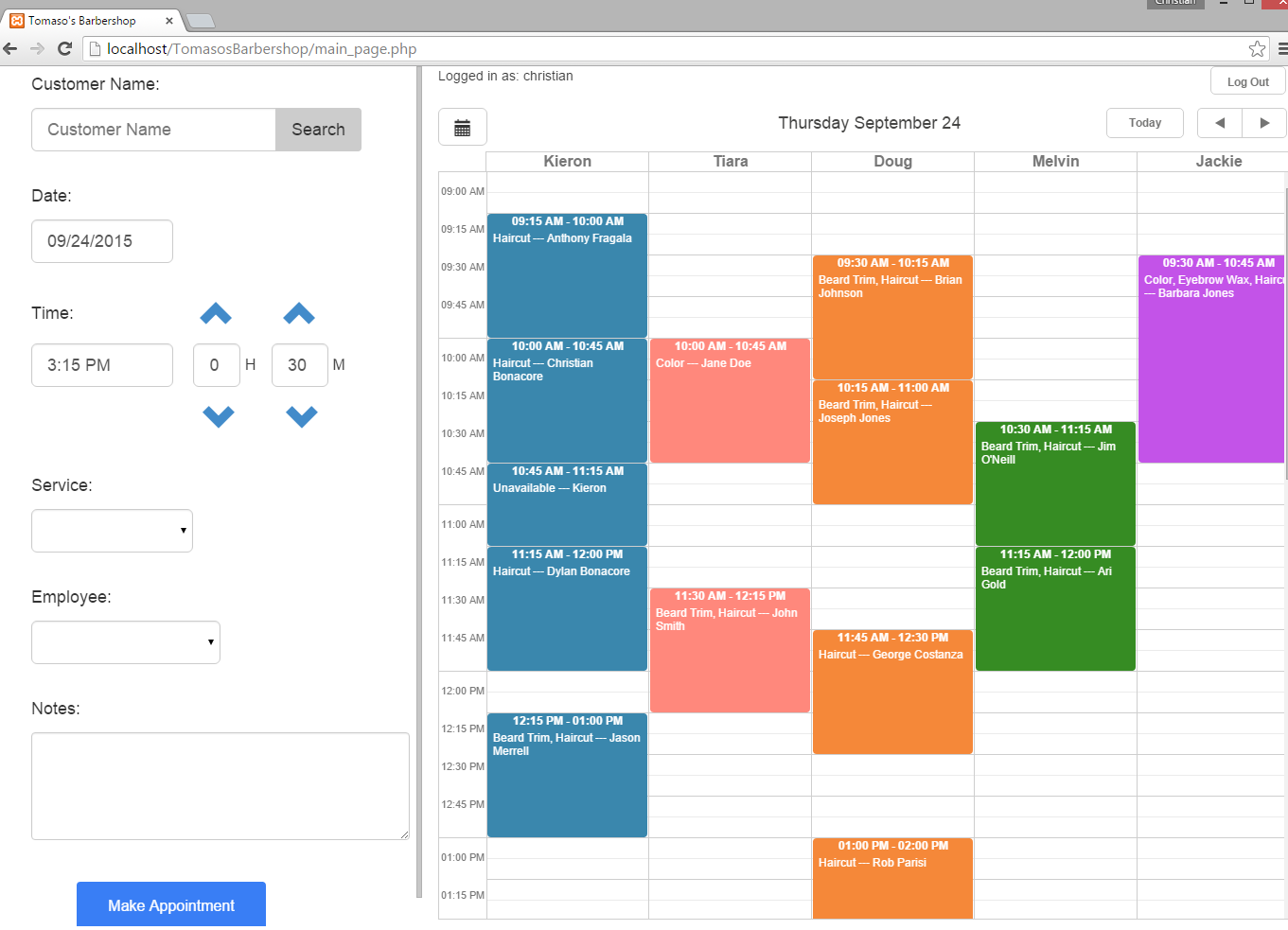


Once logged in, you will be brought to the main page of the application, shown below:



Navigation

The main screen can be divided into two parts: the **Form** and **Calendar**. These parts are highlighted by the blue rectangles below. The following two sections of the manual will explain the controls of each of these sections.

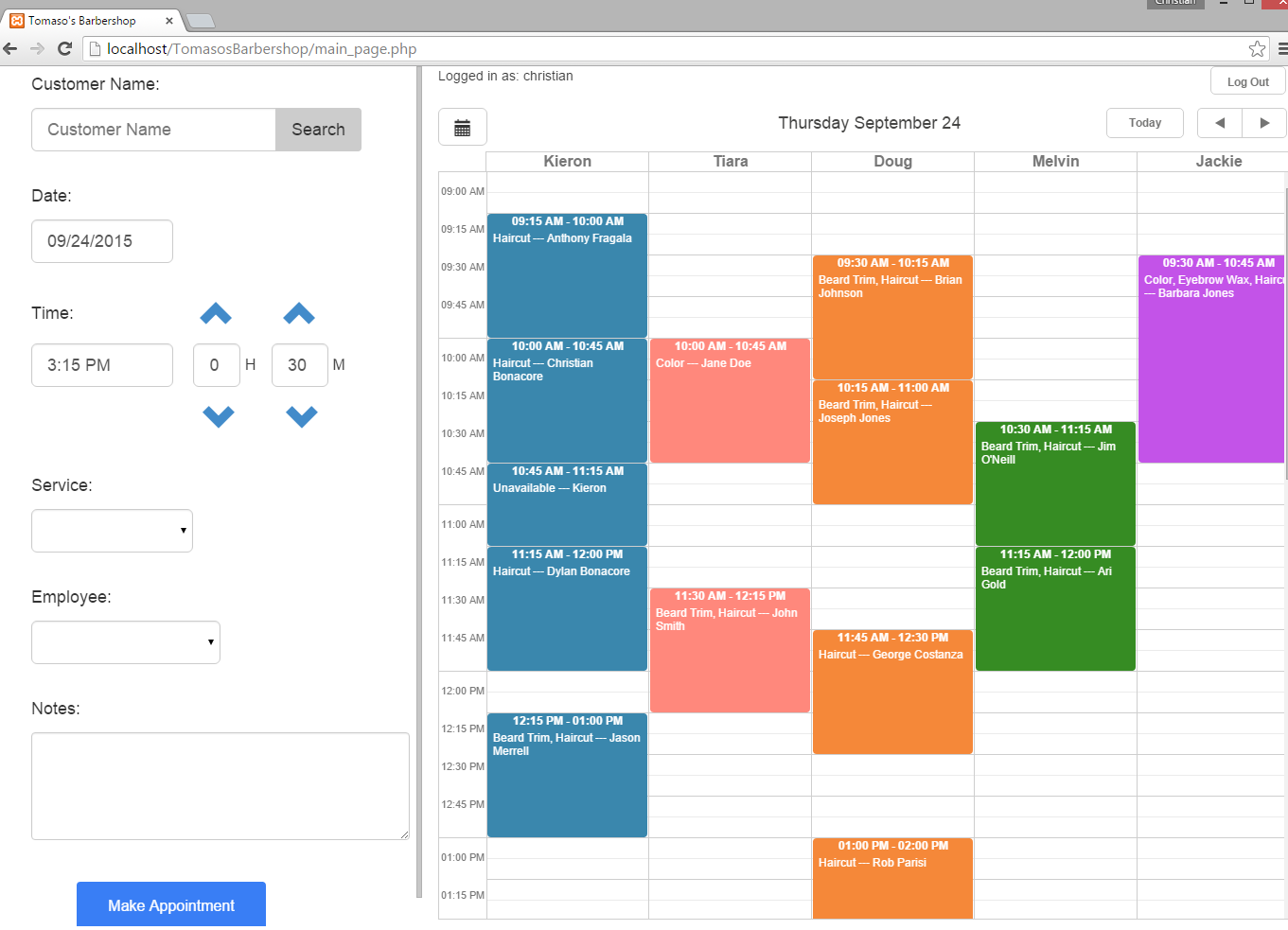


**Form**

**Calendar**

Calendar

This section describes the Calendar section of the application. The controls are shown below:



Stylist Names

Current Date

Username

Today Button

Logout Button

Prev Day

Next Day

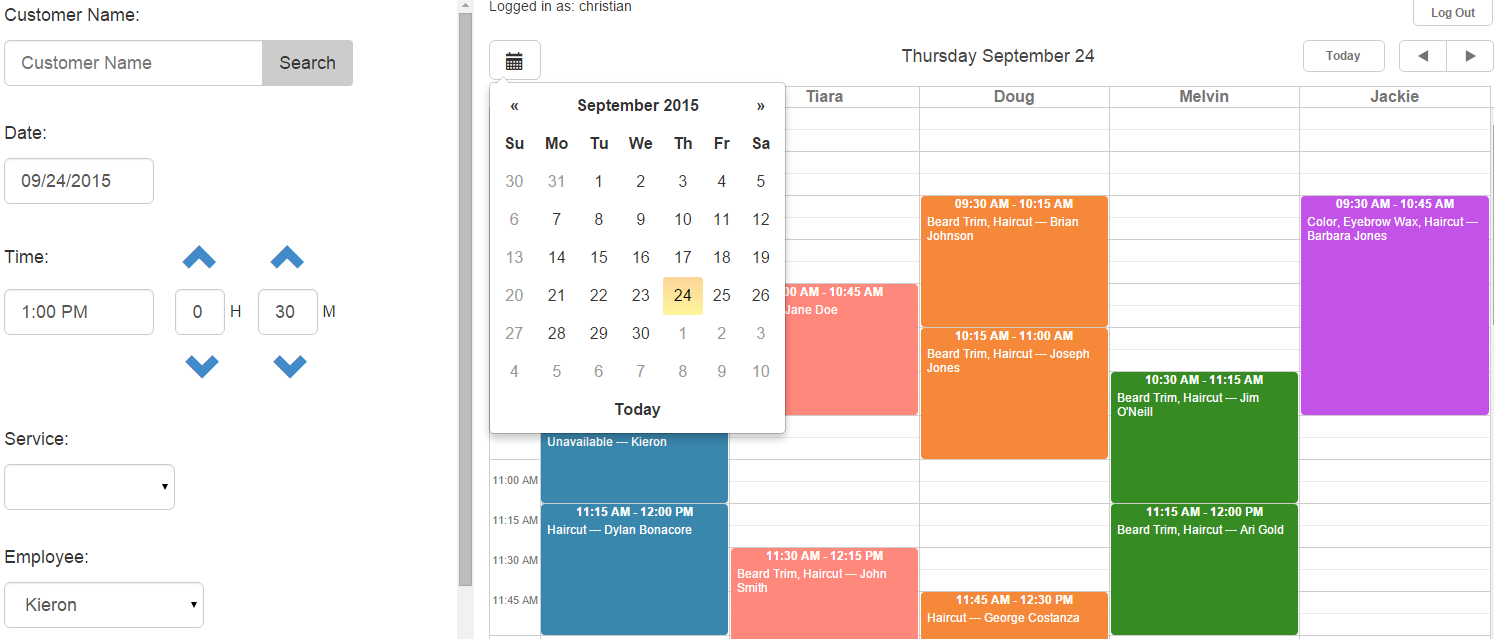
Go-To-Date Button

Please enter your username and password and press Enter.

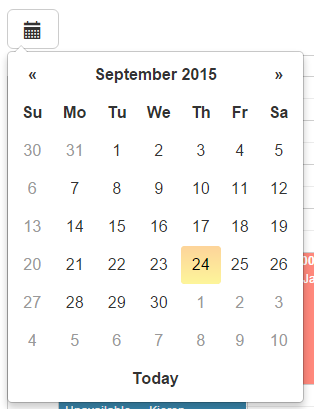
The instructions below will explain each control, moving from left to right, starting with the Go-To-Date Button.

**Go-To-Date Button**

The Go-To-Date button allows you to select any date, and the calendar will show that date. This is opposed to the Next and Prev Date buttons, which only move ahead/behind one day at a time. When clicked, the Go-To-Date button brings up a calendar widget, as shown below:



A closer look at the calendar is shown below. Notice the current day will be highlighted.



Next Month

Prev Month

Today Button

Selecting a date on the widget will close the widget, and then the calendar will be changed to the date selected. You will then see all the appointments scheduled for the date you selected. Note also the date in the Date field in the Form section will be updated to the date you select. This is done to save time when filling out the Form section.

**Username**

The username you are currently logged in as. To login as a different user, click the Logout button, and log in under a different username.

**Stylist Names**

Each of the stylists who currently take appointments will be assigned a column in the calendar.

**Current Date**

This will list the current date shown in the calendar. When the application starts, it will default to the current day, and will change as the date is changed by the user using any of the controls.

**Today Button**

Clicking this button will automatically select the current date as the day to show in the calendar. For example, if you navigate to a different date using one of the controls, you can quickly get back to the current date by clicking this button.

**Next Day**

This will show the next day in the calendar view

**Prev Day**

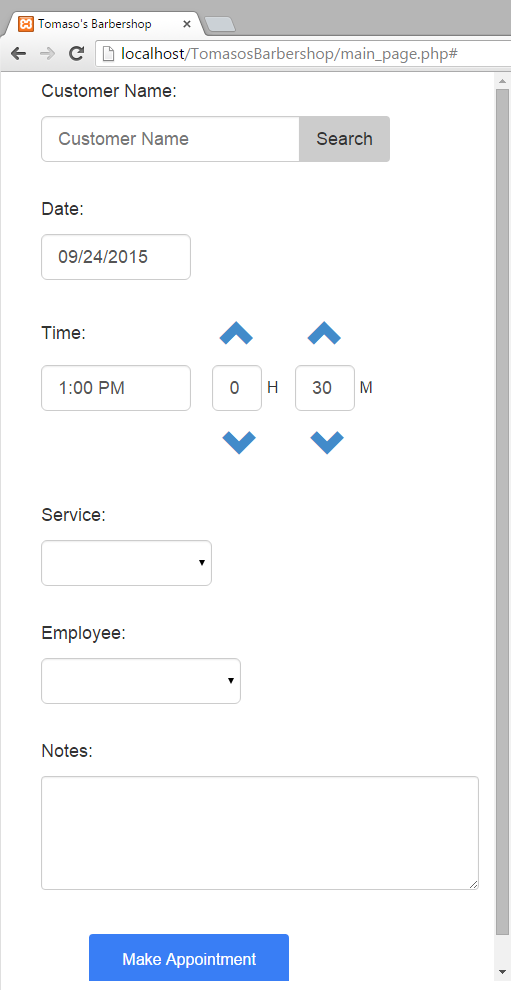
This will show the previous day in the calendar view

**Logout**

This will log you out of the system, and bring you to the login screen

Form

This section describes the Form section of the application. The controls are shown below:



Customer Search Button

Date Field

Minutes Length

Decrease Minutes

Decrease Hours

Start Time

Increase Minutes

Increase Hours

Hours Length

Services Dropdown

Notes Section

Make Appointment Button

Start Time

Appt Hours Length

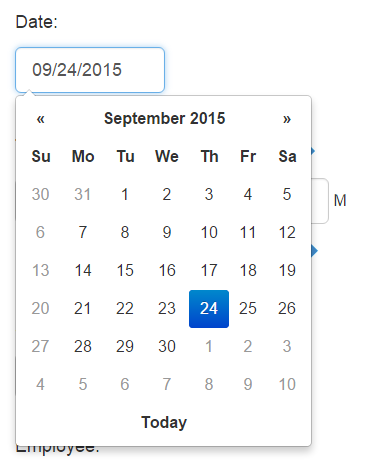
Employee Dropdown

**Customer Search Button**

Typing a customer’s name in the Customer Name field and clicking Search will search for the customer in the system. Visit the **Customer Search** section of this document for more information on searching for a customer.

**Date Field**

Clicking the date field will bring up a calendar widget similar to that of the Go-To-Date button.



Prev Month

Next Month

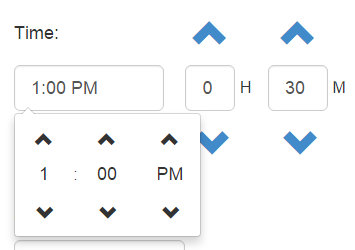
Today Button

Note the current day will be highlighted, and the current day can be selected by clicking the Today button.

Selecting a date on the widget will close the widget, and then the value in the Date field will be changed to the date selected. Note also the date in the Calendar section will be updated to the date you select. This is done to save time when filling out the Form section.

**Start Time**

Clicking on the Start Time field will bring up a widget that allows you to select a start time. The widget is shown below:



Increases minutes by 15 minutes

Decreases minutes by 15 minutes

Changes from AM to PM and vice-versa

Increases hours by 1

Decreases hours by 1

Use the arrows as indicated above to choose a start time for the appointment. Note that the time wraps. For example, if the time is set to 1:45 PM, and you increase the time by 15 minutes, it will move to 2:00 PM, and vice versa.

The length of the appointment is determined by the values set in the Hours and Minutes fields. By default, the length will be set to 0 hours and 30 minutes. The length of the appointment is **not** determined by the services selected. You can use the following controls to increase/decrease hours/minutes.

**Increase Hours**

Increases the number of hours for the appointment by 1. Note the hour values are only from 0-8. If you are at 8 hours and select Increase Hours, hours will go back to 0.

**Decrease Hours**

Decreases the number of hours for the appointment by 1. Note the hour values are only from 0-8. If you are at 0 hours and select Decrease Hours, hours will go to 8.

**Increase Minutes**

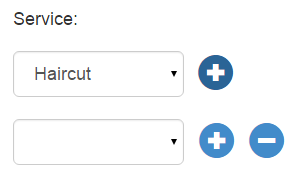
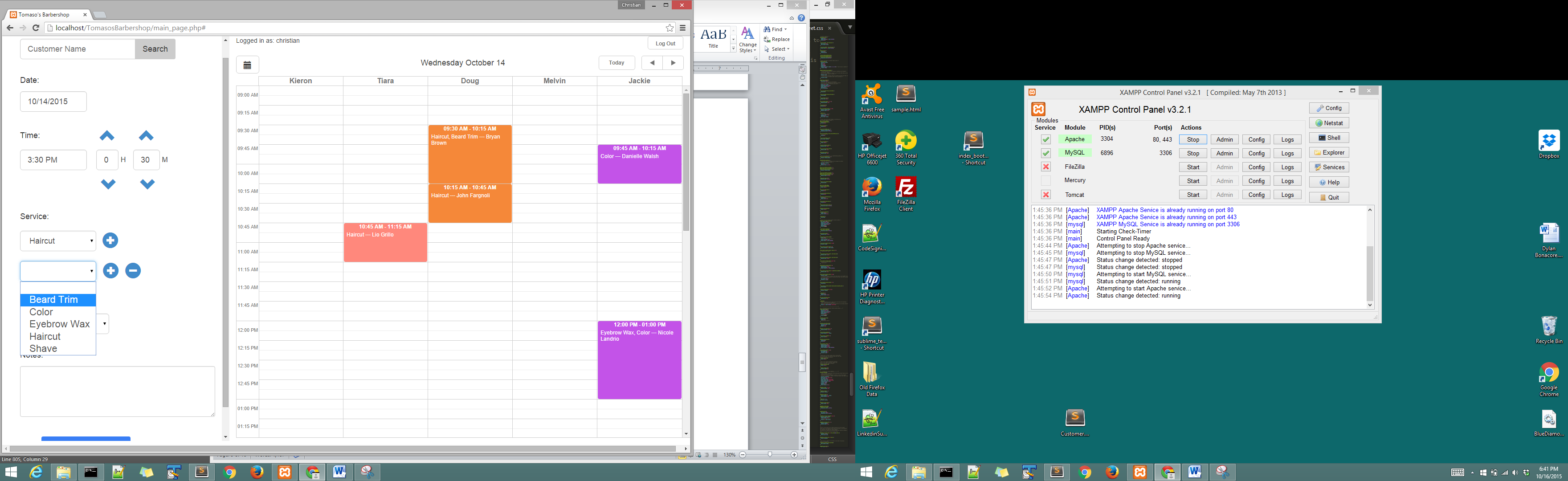
Increases the number of minutes by 15 minutes. The time does NOT wrap and increase hours. For example, if hours is set to 0 and minutes is set to 45, increasing minutes by 15 will set both hours and minutes to 0.

**Decrease Minutes**

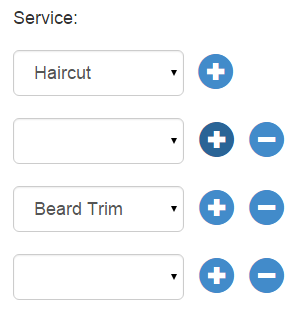
Decreases the number of minutes by 15 minutes. The time does NOT wrap and decrease hours. For example, if both hours and minutes are set to 0, decreasing minutes by 15 will set hours to 0, and minutes to 45.

**Services Dropdown**

This can be used to select the service(s) for the appointment. Note one appointment can have more than one service. Once a selection has been made from the services dropdown (the value is not blank), a plus sign will appear. To add another service to the appointment, click the plus sign to add a copy of the dropdown below the first one.



A selection can be made from this newly added dropdown. The minus sign will remove the dropdown, and the plus sign will add another dropdown of services. If you select a service from an added dropdown, and then remove it by clicking the minus sign, then that service will not be included in the appointment.



You can add as many dropdowns as you’d like; however when the appointment is made, only the dropdowns with selected values will be included in the appointment. For example, if these are the dropdowns under Service when the user clicks Make Appointment, then the appointment will include a Haircut and Beard Trim as the services included in the appointment.

**Employee Dropdown**

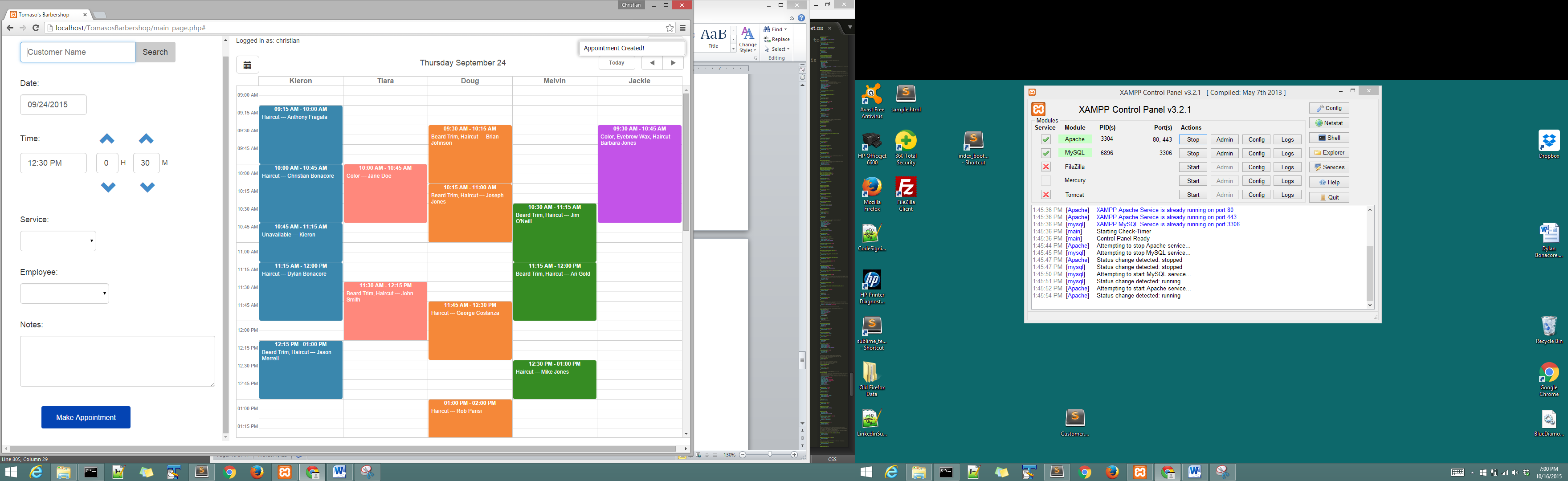
Select the employee with whom the appointment will be scheduled. Only employees assigned a column in the Calendar will be listed in the dropdown.

**Notes Section**

Add any text here to be included in the notes of the appointment. For example, “Coming in with 3 kids”, or “may be a few minutes late”, etc.

**Make Appointment Button**

This will validate the data entered, and then add the appointment. The only field in the Form which can be left blank is the Notes section. If any are not entered or entered incorrectly, then an error message will appear. When the appointment is added successfully, you will see it appear under the date/time you selected in the Calendar, and a notification will display for a few seconds in the top right of the screen, and then disappear.



Customer Search

This section will describe how to use the customer search features to find a customer stored in the system. In order to make an appointment, you must use a customer who exists in the system. The features described below will help you narrow your search and find the customer you are looking for.

To search for a customer, type their name into the Customer Name field and click the Search button. Depending upon the customer name you entered, one of three results will occur; there will be an exact match, a partial match, or no match at all. Each of these is described below:

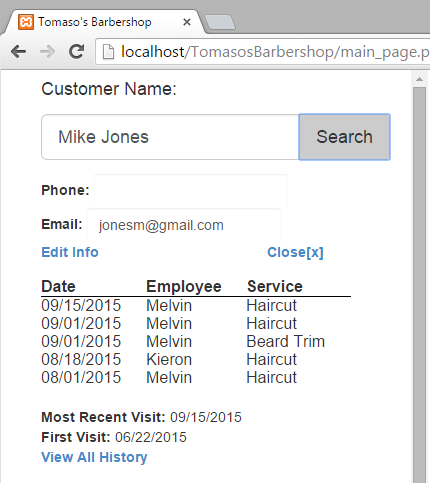
***Exact Match***

If you search for a customer’s name, and there is an exact match to a name in the system, then that name will appear, along with information about that customer. For example, if you searched for “Mike Jones”, and there is a “Mike Jones” in the system, the following will be displayed in the Form section:

Edit Info Link

Close Customer Window

Quick History Table



Email & Cell Phone Number

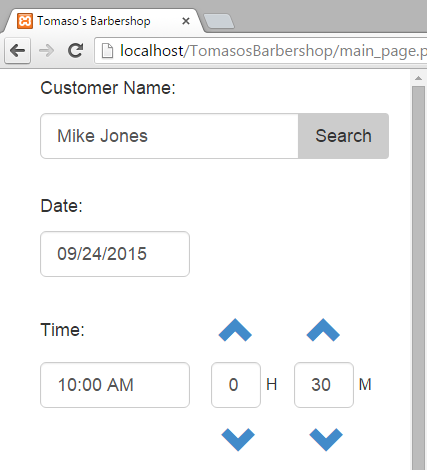
View Full History Link

Customer Name

The customer’s basic contact information (cell phone number and email address), and their recent visit history are displayed. Note the search is not case-sensitive. If you entered “mike jones”, the same result would occur.

Notice this customer does not have a cell phone number stored in the system. To add or edit the customer name, cell phone number, or email address, click the Edit Info Link. For more information on how to do this, visit the **Edit Customer Info** section.

The **Close Customer Window** link will collapse this section, and will look as follows after collapsed:

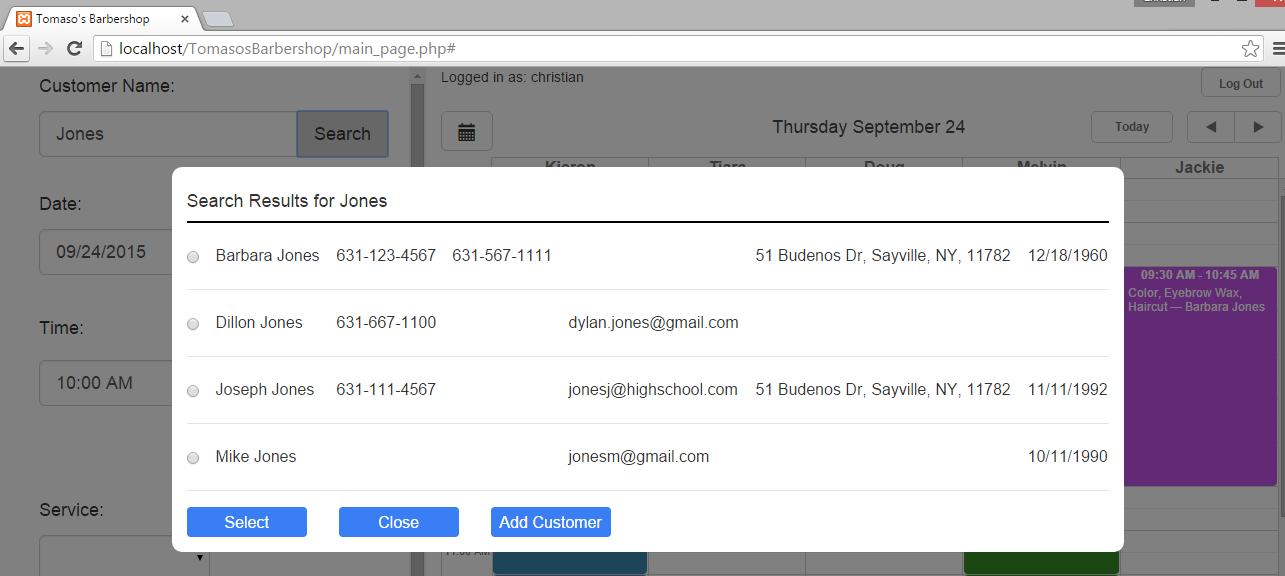


The Quick History Table shows the Date, Employee, and Service of the customer’s last five visits. This information can be used to suggest to the customer which employee they might like to see, or services they might be interested in receiving.

The date of the customer’s most recent visit, along with the date of their first visit is also displayed. This will give you an idea of how loyal the customer is, or if they have not been to the shop in a while.

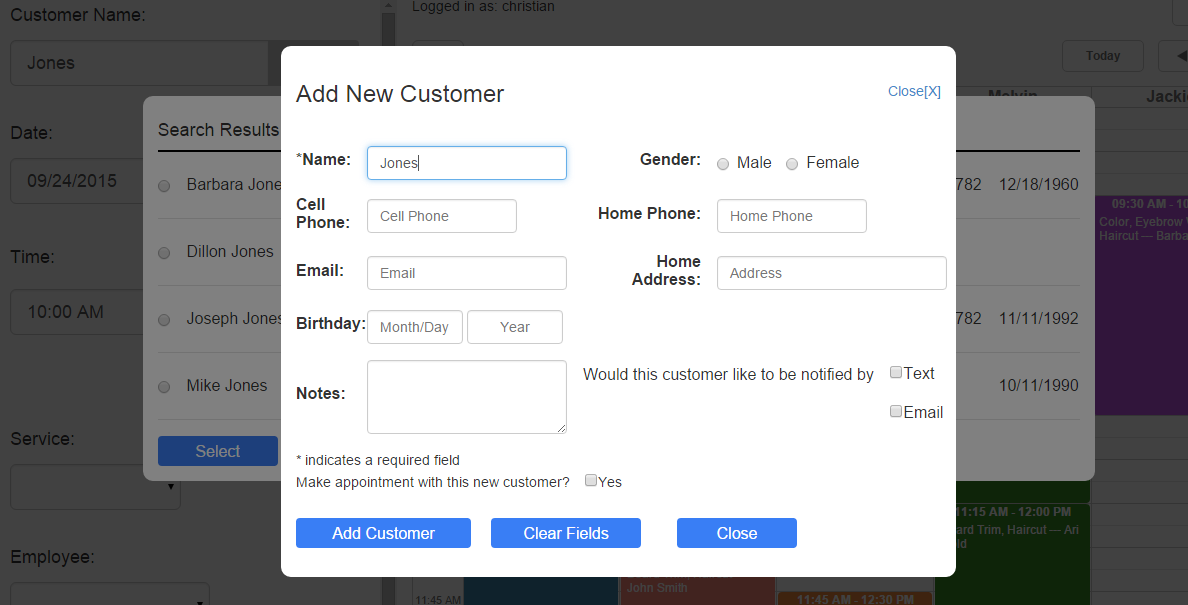
The **View Full History Link** will bring up a more detailed view of the customer’s history. For more information on this section, visit the **Full Customer History** section.

***Partial Match***

Say for example you searched for “Jones”, instead of “Mike Jones”. This will be a partial match, and all customers’ names containing “Jones” will be displayed, as shown below:

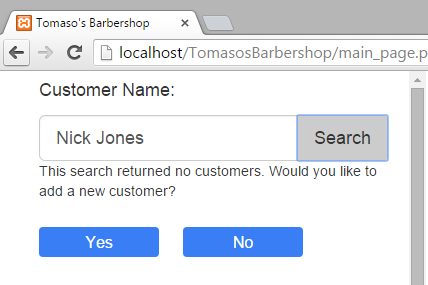
This will list the names, and basic contact information for customers containing the name “Jones” in alphabetical order. Once you find the customer who you are looking for, you can either click the grey circle next to the customer’s name and click Select, click on the entire row and click Select, or double-click on the row. Clicking Select or double-clicking on the row will select the customer’s name you have selected and then close the window.

Clicking on the Add Customer button will bring up the Add Customer window, and pre-fill the customer name field on the form with what you have searched for (“Jones” in this case). You would use this feature if you searched for a “Jones” which is not yet in the system. For more information on adding a new customer, visit the **Add New Customer** section.



***No Match***

If you search for a customer who is not in the system (“Nick Jones” for example), you be prompted if you would like to add a new customer to the system, as shown below:

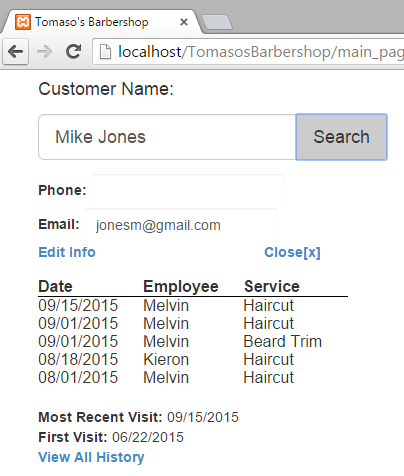


Clicking “Yes” in this instance will bring up the Add New Customer form, with the Customer name pre-filled with “Nick Jones”. Also note that if you left the Customer Name field blank and clicked Search, this prompt would also appear. This is an easy way to get to the Add New Customer form.

Editing Customer Information

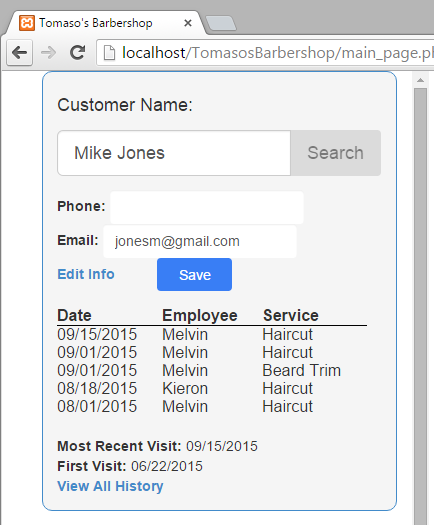
In the example for searching for a customer, the customer we found did not have a cell phone number stored in the system. The system does not require a cell phone number for a customer in order to make an appointment; however this is good information to have on a customer in case they need to be contacted, for example to confirm an appointment.

In the screenshot below, the customer does not have a cell phone number listed in the system. To edit or add information about a customer, search for their name, and click the **Edit Info** link.



Edit Info Link

This will bring you into Edit mode, as shown below:

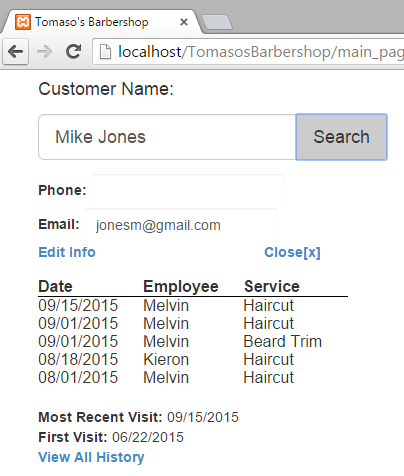


In this view, you can edit/add/remove the customer’s name, cell phone number, and/or email address. Once you have entered/removed the information you want, clicking **Save** will save the information in the system. If you wish to exit Edit mode without saving anything, click **Edit Info** again to exit Edit mode (note this will not save any information to the system). When the information is saved, you will see a notification in the top right corner of the screen, indicating the changes have been saved.

Note that while in Edit mode, other fields in the Form section will be disabled. This includes the Service and Employee dropdown, as well as the Make Appointment button. While in Edit mode, you will not be able to make an appointment.

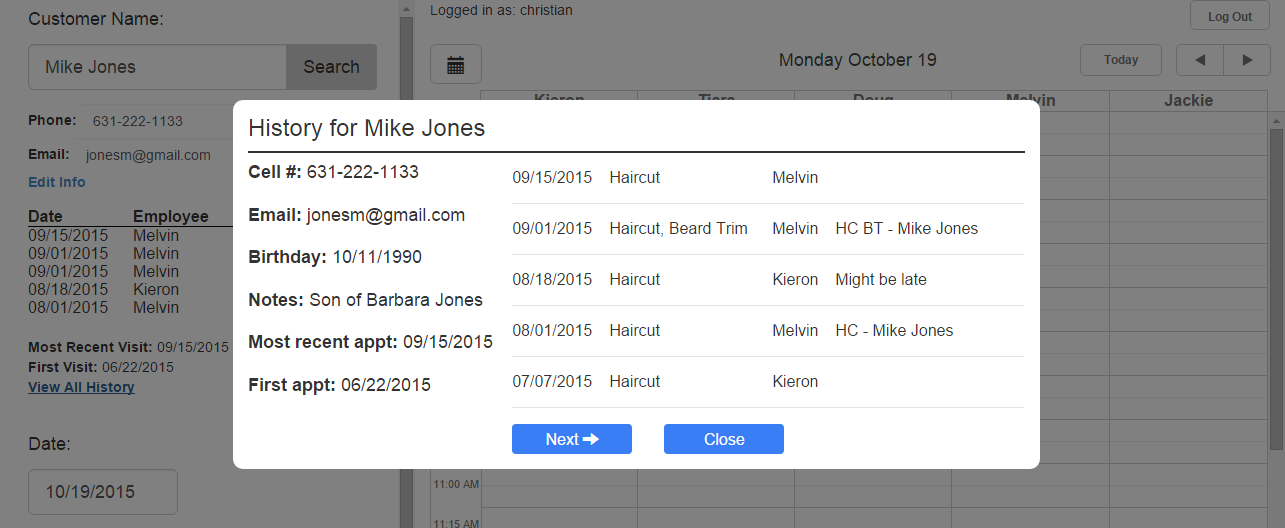
Full Customer History

The Quick History Table in the exact match of a customer search will show the Date, Employee, and Service of the last five visits for that customer. To see a more detailed view of the customer’s history, click the **View All History** link.

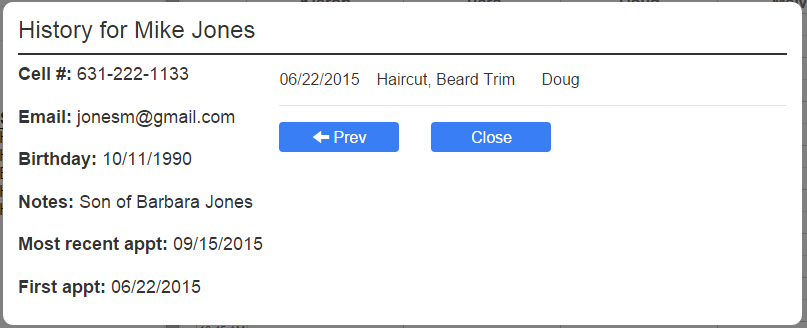


View All History

This will bring up a view of the customer’s entire history, along with any information stored for that customer:



This view will list up to 5 appointments at once. To view older appointments, click the Next button.



Clicking Prev will show you more recent appointments. Clicking the Close button will close this window.

Editing an Appointment

This section will describe how to edit information about a scheduled appointment. Editing appointment information is done using what is known as the **lightbox**, which contains the fields and controls to edit an appointment. There are two ways to access the lightbox for an appointment:

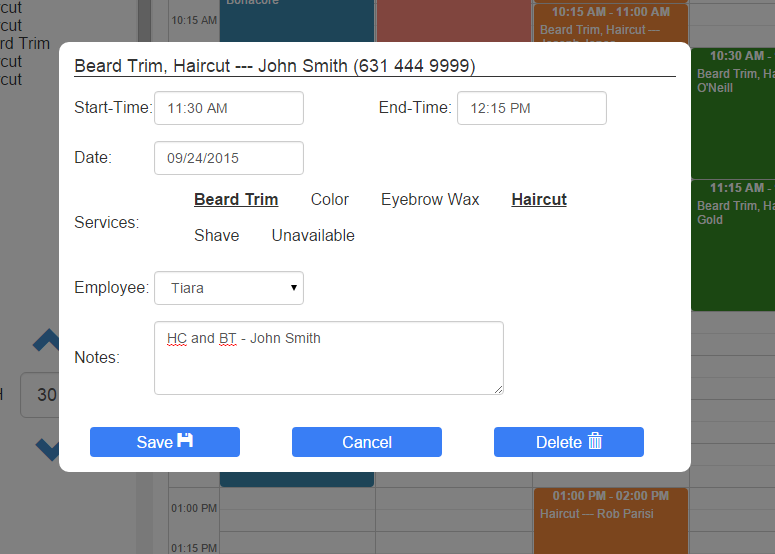
1. Double click or double tap on an appointment in the Calendar
2. The Details button of the QuickInfo window

Visit the **QuickInfo** section of this document for more information on the Quick Info window.

Once opened, the lightbox will appear in the middle of the screen:

Customer Cell Phone Number

Appointment Title



Start-Time

Start Time

End-Time

Date

Services

Employee

Notes

The Start-Time and End-Time fields both use the same time widget used in the Time field of the Form section, and the Date field uses the same widget as the Date field in the Form section.

Note when using the widget for the Start-Time and End-Time, after making a selection for the time, please click within the lightbox in order to close the widget. Do NOT close the lightbox without first closing the time widget; otherwise the time widget will be displayed after the lightbox has been closed.

**Services**

In the Services section, the services included for the appointment will be bolded and underlined. To add/remove services, simply click on the service you want to add/remove. When you click on a service in the list, it will toggle the bold/underlined affect. When saved, the services which have the bold/underline affect will be those included for the appointment. Note that you must select at least one service for the appointment.

**Employee**

Use this dropdown to change the employee assigned to this appointment.

**Notes**

Use this section to add or edit the notes about this appointment. Keep in mind these notes are different than Customer notes. These notes are specific to the appointment, not the customer. This field can be left blank if desired.

**Save**

Saves the information you have entered and closes the lightbox. You will see the changes in the calendar.

**Cancel**

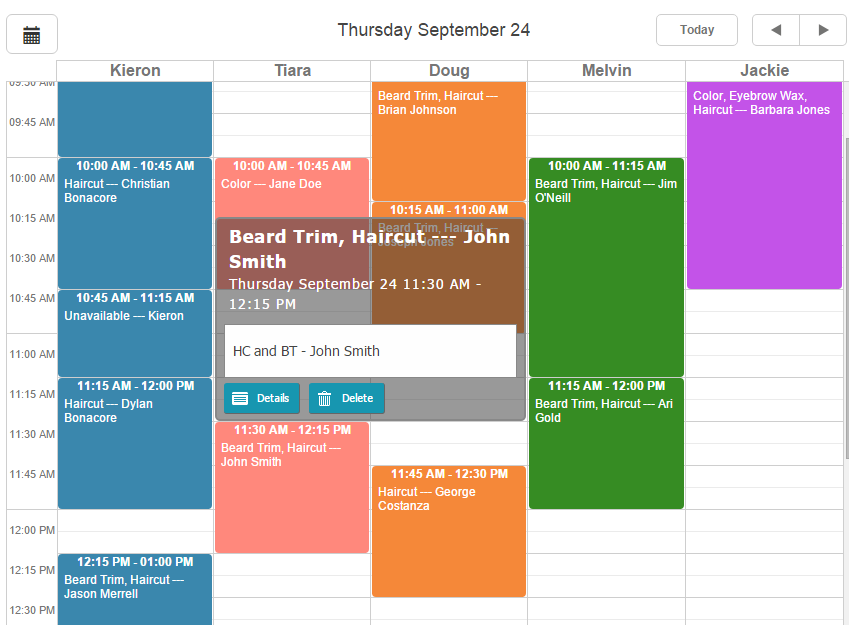
Closes the lightbox without making any changes to the appointment. No changes you made will be saved.

**Delete**

Removes the appointment from the Calendar. When clicking Delete, you will be prompted if you are sure you want to delete the appointment.

QuickInfo Window

The QuickInfo window provides important information about an appointment without opening the lightbox, or looking at a customer’s visit history. To view the QuickInfo window, click on an appointment in the calendar.



Appointment Info

QuickInfo Window

Appointment Notes

Delete

Details

The QuickInfo window will be displayed either above or below the appointment in the Calendar. The window will include the title of the appointment (the services included in the appointment, and the customer name), along with the date, and start and end time of the appointment. The white text box will list any notes that were added when the appointment was made.

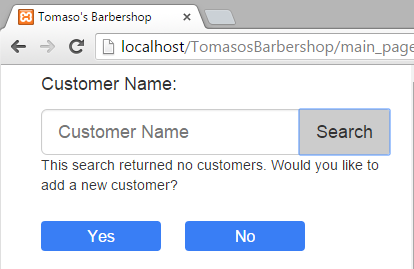
The **Details** button will bring up the modal window. The **Delete** button will prompt you if you want to delete the appointment. Clicking Yes will delete the appointment and remove it from the Calendar.

To close the QuickInfo window, click on any white space in the Calendar.

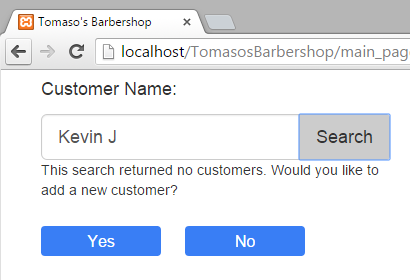
Adding a Customer

This section will describe how to add a new customer to the system. In order to make an appointment, you must use a customer which exists in the system. There are three ways to get to the Add New Customer form:

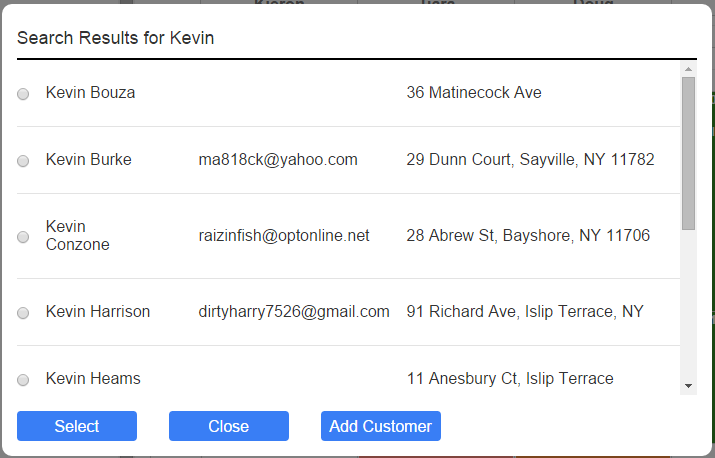
1. Click the Search button next to the Customer Name field without entering any text in the Customer Name field, and click Yes when prompted to add a new customer



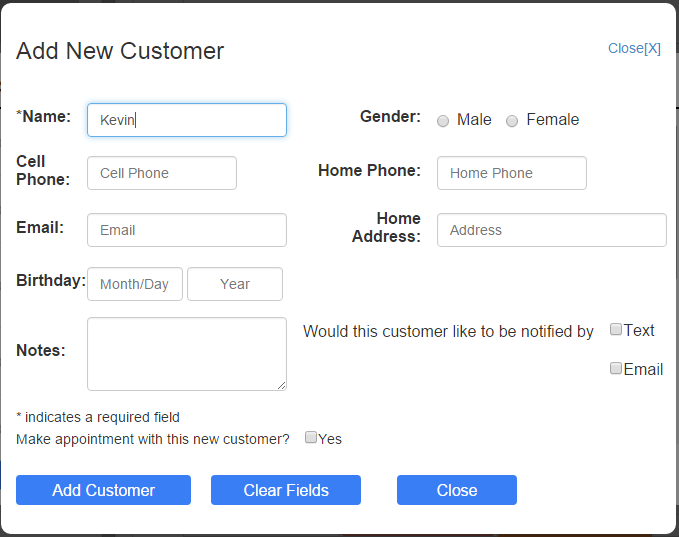
1. Return no matches from a customer search, and click Yes when prompted to add a new customer



1. Return a partial match for a customer search, and click the Add Customer from the results window



In the second and third option, when the Add New Customer form is displayed, the Customer Name field will be pre-filled with what you have searched for. If using the first option, the field will be initially blank.



Use the form to fill out the appropriate fields for the customer. The Name field is the only field which is required.

**Cell Phone/Home Phone Number**

These fields must be either 7 or 10 digits long (area code is optional, but recommended for text alerts in the future). You may also put either a space or dash (“-“) in between sets of numbers.

**Email Address**

The entered email address must contain the at symbol (“@”), and a dot (“.”) in order to be considered a valid email address.

**Birthday**

If entering a birthday for the new customer, the Year field is optional. For the Month/Day field, use the widget to select a month and a day for the birthday.

**Notes**

Use the Notes section to add any notes for the customer. For example, the customer’s allergies, children’s names, parent’s names, etc. Keep in mind these notes will be specific to the new customer.

**Text/Email**

The system currently does not provide any text or email alerts, but it is something that could potentially be added in the future. If the customer would like to receive these alerts, please indicate so by checking either Text or Email. Note that if you check Text, then you must enter a cell phone number. If you check Email, then you must enter an email address.

**Make appointment with this new customer?**

Check “Yes” here if you would like to add this new customer to the system, and then make an appointment with this newly added customer. If checked, after the customer is added, their name will be pre-filled in the Customer Name field of the Form section.

**Add Customer Button**

This will perform validation on the data entered, and then add the customer to the system once validation is successful.

**Clear Fields Button**

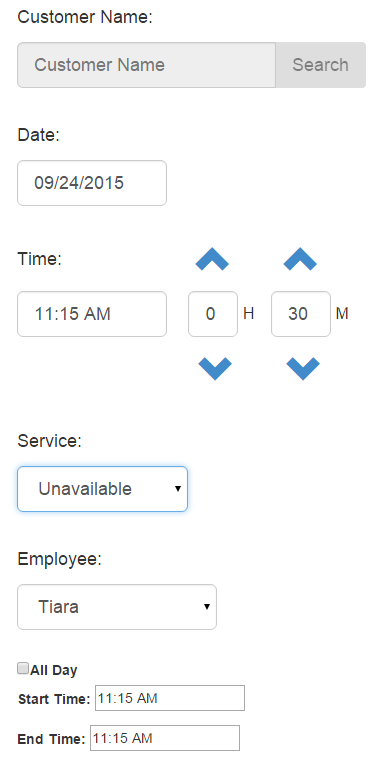
Set all the fields to blank. Note this will not close the form, but you will lose any data for the new customer you have added.

**Close Button**

Closes the form. Note you will lose any data you have not yet saved.

Unavailable Appointment for Employees

In order to schedule time which an employee is unavailable for appointments (either sick, on vacation, off day, doctor’s appointment, etc.), from the Services dropdown, select **Unavailable**. This will bring up the Unavailable fields under the Employee dropdown:



Notice the Customer Name field becomes greyed out when you select Unavailable. This is because the appointment is intended for employees, not customers.

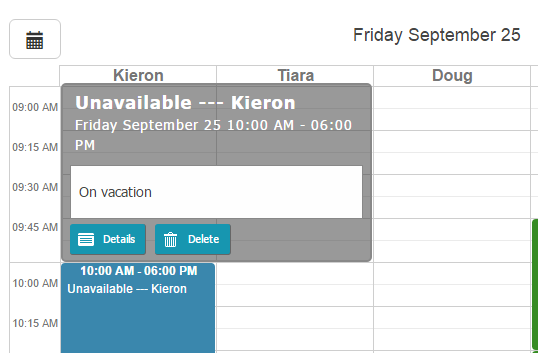
The Time field here can be ignored since you are setting the start and end-time below.

Select the employee which will be Unavailable.

You have the option to set a specific start/end time, or select All Day. If All Day, then the employee will be blocked off from 9am-7:30pm. For example, “All Day” would be used if the employee is took the day off, but if the employee had a doctor’s appointment, you may want to set specific start/end times.

You may add Notes to the appointment to describe why the employee is unavailable (“On vacation”, “Doctor’s appointment”, etc.).

When the Unavailable appointment is made, it will appear as a regular appointment in the Calendar, but will instead have “Unavailable --- EmployeeName” as the title, where EmployeeName is the name of the employee that is unavailable. The notes entered will also show in the QuickInfo window.



Navigation

Form Fields

Each of the buttons/controls

Calendar

Each of the buttons/controls

Making an Appointment

Searching for a customer

Selecting Date

Selecting Start Time and Duration

Selecting Services

Selecting Employee

Adding Notes

Tips

Employee name and start time can be selected in one click

Unavailable

All Day v. Specific Start and End Time