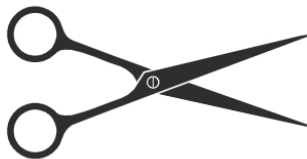


SALON

CRM



User Journeys

- ❖ Logging In
- ❖ Setting up Services
- ❖ Adding a Customer
- ❖ Adding an Appointment
- ❖ Confirming payment
- ❖ Accessing Appointment Summary Report

- ❖ Notes:
- ❖ All user journeys from 'Setting up Services', presume user is logged in
- ❖ Document is intended to provide an overview of the application

Logging In

127.0.0.1:8000/admin/

Hairdressing Salon Appointments CRM

Username:

Password:

Log in

127.0.0.1:8000/admin/

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Site administration

AUTHENTICATION AND AUTHORIZATION	
Groups	+ Add Change
Users	+ Add Change

SALON_CRM_BASE	
Appointments	+ Add Change
Customers	+ Add Change
Services	+ Add Change

[Appointment Summary Report](#)

- ❖ Given I am at the login page and I have entered my user name and correct password
- ❖ When I click on 'Log In'
- ❖ Then I will see the admin home page

Setting up Services

← → ↻ 🏠 ⓘ 127.0.0.1:8000/admin/sal... 🔍 ☆ 🌐 | 👤 ⋮

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Home > Salon_Crm_Base > Services

✅ The service "Full Head" was added successfully.

Select service to change

ADD SERVICE +

Action:

0 of 2 selected

<input type="checkbox"/>	SERVICE	PRICE	ESTIMATED MINUTES
<input type="checkbox"/>	Full Head	70	60
<input type="checkbox"/>	Blowdry	40	40

2 services

- ❖ Given I am at the admin home page and I have clicked on 'Services'
- ❖ Then I will see a Services List View
- ❖ When I click 'Add Service' then I will see a Services Detail View
- ❖ Then I can proceed to specify details and click 'Save' for the service record
- ❖ Then I will be redirected to the Services List View

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Home > Salon_Crm_Base > Services > Add service

Add service

Service:

Half Head

Price:

45

Estimated minutes:

40

SAVE

Save and add another

Save and continue editing

- ❖ NB.
- ❖ Clicking on a service in the Services List View provides the option to once again edit the details for the service in a Services Detail View as above

Adding a Customer

127.0.0.1:8000/admin/salon_crm_base/customer/

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Home › Salon_Crm_Base › Customers

Select customer to change

ADD CUSTOMER +

Search

Action: Go 0 of 1 selected

ID	FIRST NAME	LAST NAME	PHONE NO	EMAIL	POSTCODE
2	Marie	Hall	-	marie@test.com	-

1 customer

FILTER

By active

All
Yes
No

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Home › Salon_Crm_Base › Customers › Add customer

Add customer

Name

Title: First name: Last name:

Contact Details

Phone no: Email:

Address

Address line 1: Address line 2: Address line 3:

Town: County: Postcode:

Contact Preferences

☐ Phone is contactable ☐ SMS is contactable ☐ Email is contactable

Activation Information

☒ Active

Date activated: -

Date deactivated: -

Save and add another Save and continue editing SAVE

- ❖ Given I am at the admin home page and I have clicked on 'Customers'
- ❖ Then I will see a Customers List View
- ❖ When I click 'Add Customer' then I will see a Customer Detail View
- ❖ Then I can proceed to specify details and click 'Save' for the customer record
- ❖ Then I will be redirected to the Customer List View

- ❖ NB.
- ❖ Clicking on a customer in the List View provides the option to once again edit the details
- ❖ Fields e.g. for name and email are compulsory to help enforce unique constraints for the database

Adding an Appointment

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Home > Salon_Crm_Base > Appointments

✓ The appointment "Appointment 2019-04-12, @14:00:" was added successfully.

Select appointment to change ADD APPOINTMENT +

Action: Go 0 of 2 selected



	DATE	1	START TIME	2	END TIME	CUSTOMER	QUOTE
<input type="checkbox"/>	April 12, 2019		11 a.m.		11:30 a.m.	Marie Hall	25.0
<input type="checkbox"/>	April 12, 2019		2 p.m.		2:40 p.m.	Louise Day	40.0


2 appointments


FILTER
By date
Any date
Today
Past 7 days
This month
This year
No date
Has date

Add appointment

Appointment Details

Customer: Marie Hall  


Date: 2019-04-12 Today 
Note: You are 1 hour ahead of server time.

Start time: 16:00:00 Now 
Note: You are 1 hour ahead of server time.

End time: -


Services:

Blowdry
Full Head
Cut & Finish


Hold down "Control", or "Command" on a Mac, to select more than one.

Payment Information

Quote: 0

Date paid: Today 
Note: You are 1 hour ahead of server time.

Save and add another Save and continue editing SAVE

- ❖ Given I am at the admin home page and I have clicked on 'Appointments'
- ❖ Then I will see a Appointments List View
- ❖ When I click 'Add Appointment' then I will see an Appointment Detail View
- ❖ Then I can proceed to specify details and click 'Save' for the appointment record
- ❖ Then I will be redirected to the Appointment List View
- ❖ And will see the quote and end time updated for the appointment

- ❖ NB.
- ❖ Clicking on a appointment in the List View provides the option to once again edit the details
- ❖ Please note logic to validate clashing appointment times in the list view would be an additional feature

Confirming Payment

Hairdressing Salon Appointments CRM

WELCOME, SIAN. [VIEW SITE](#) / [CHANGE PASSWORD](#) / [LOG OUT](#)

Home > Salon_Crm_Base > Appointments

Select appointment to change

Action: 0 of 4 selected

<input type="checkbox"/>	DATE	1 ▾	START TIME	2 ▲	END TIME	CUSTOMER	QUOTE
<input type="checkbox"/>	April 12, 2019		11 a.m.		11:30 a.m.	Marie Hall	25.0
<input type="checkbox"/>	April 12, 2019		2 p.m.		2:40 p.m.	Louise Day	40.0
<input type="checkbox"/>	April 12, 2019		4 p.m.		4:40 p.m.	Marie Hall	40.0
<input type="checkbox"/>	April 11, 2019		11 a.m.		11:30 a.m.	Danielle Horner	25.0

4 appointments

FILTER

By date

Any date

Today

Past 7 days

This month

This year

No date

Has date

By start time

Payment Information

Quote: 25.0

Date paid: Today

Note: You are 1 hour ahead of server time.

- ❖ Given I am at the Appointments List View
- ❖ When I click on an existing appointment with a quote
- ❖ Then I will see the Appointment Detail View
- ❖ Given the customer has paid
- ❖ Then I can proceed to update the Date paid field in the Detail View and click 'Save'
- ❖ Then I will be redirected to the Appointment List View

- ❖ NB.
- ❖ This has implications for helping track paid and forecasted income in the Appointment Summary Report

Accessing Appointment Summary Report

Hairdressing Salon Appointments CRM

Home

Appointment Summary Report

DATE	NO. OF APPOINTMENTS	INCOME PAID	FORECASTED INCOME	TIMESLOTS AVAILABLE
April 11, 2019	1	25.0	25.0	09:00-11:00 11:30-17:00
April 12, 2019	3	0.0	105.0	09:00-11:00 11:30-14:00 14:40-16:00 16:40-17:00

- ❖ Given I am at the admin home page and I have clicked on 'Appointment Summary Report'
 - ❖ Then I will see a table as above
 - ❖ This provides an overview of expected income and the number of appointments and free timeslots by the day
- ❖ NB.
 - ❖ Please note providing filters 'By date' would be an additional feature