ROSCOE FLORA SYSTEM GUIDE

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GUIDE CONTENTS

CREATING AN APPOINTMENT

New Customer

appointment id

CANCEL APPOINTMENT   RESCHEDULE APPOINTMENT

First Name   Last Name

Email   Phone Number

Date picker inline
11/25/2019   Time picker
09:11 PM

CONTINUE

In order to schedule an appointment and generate a service cost estimate with Roscoe Flora, new customers must fill out the customer information form (pictured above) and provide the desired date and time of appointment.

STEP 1: PROVIDE CONTACT INFORMATION

Enter appropriate contact information into the customer information form: first and last name, a valid e-mail address, and a valid phone number.

STEP 2: INDICATE DESIRED DATE AND TIME OF APPOINTMENT
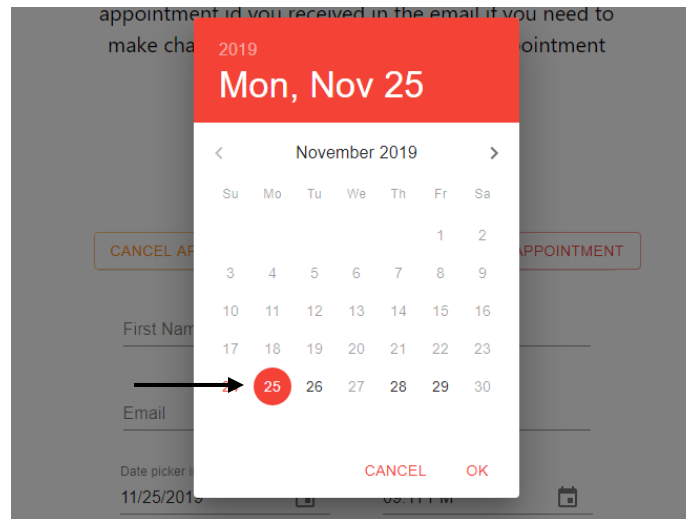
To select a **date** for your appointment, click the calendar icon located within the date field. Available dates are indicated by black text, while dates that are currently unavailable are indicated by gray text. Select the date that best suits your needs, then click 'OK'.
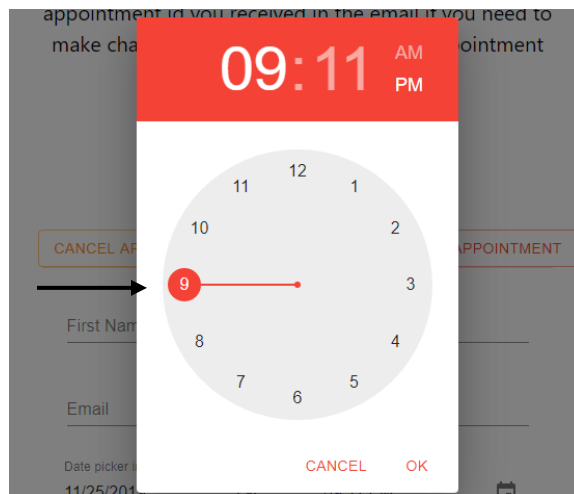
To choose a **time** for the appointment, click the calendar icon located within the time field. Select the desired time by clicking the appropriate digits on the clock face and indicating either AM or PM. Select 'OK'.

STEP 3: GENERATING ESTIMATE OF SERVICE COST

Once valid contact information and a desired date of appointment has been provided, a customer must then select the '**Continue**' button located at the bottom of the form. The following will now be displayed:

What type of photoshoot are you interested in

⭕ Headshot ⭕ Portraiture ⭕ Fashion

where would you like your photos taken

in-studio ⭕ out-of-studio ⭕

Photoshoot address

Estimated cost

Dress changes ▾ $150.00

Special requests

BACK

CONTINUE

The selection of photoshoot type, location (in-studio photoshoots will automatically generate the address of Roscoe Flora's studio), and number of outfits will automatically generate a live estimate for the total cost of the service. Special requests or instructions may also be provided.

STEP 4: CONFIRM THE INFORMATION PROVIDED

By selecting 'Continue,' customers will be prompted to confirm the information provided on the previous forms. If all information is correct, select 'Confirm & Continue." Incorrect information can be changed by selecting the provided 'Back' buttons at the bottom of each form.
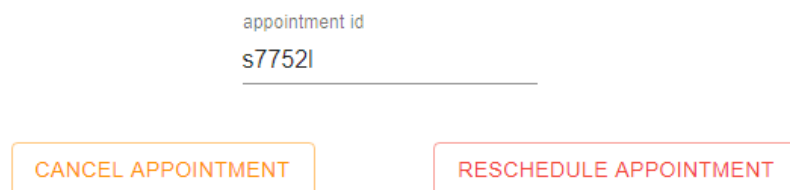
Once a customer has confirmed that the information is correct, an e-mail will be sent to the provided e-mail address, as well as to Roscoe Flora, with a copy of the appointment information, estimate, an appointment ID, and any further instructions.

RETURNING CUSTOMER

Customers who have previously scheduled an appointment will have received an **appointment ID** within the appointment confirmation sent to the provided e-mail address. This appointment ID will be required to make changes to any contact information, or to reschedule or cancel their appointment.

IMPORTANT NOTE: Clients cannot manually cancel appointments scheduled to occur within 48 hours. If a client wishes to cancel such an appointment, the client must call Roscoe Flora directly.

STEP 1: ENTER APPOINTMENT ID INTO PROVIDED FIELD

appointment id

s7752l

CANCEL APPOINTMENT   RESCHEDULE APPOINTMENT

STEP 2: RESCHEDULE OR CANCEL APPOINTMENT

To reschedule or cancel an appointment, select either '**Cancel Appointment**' to cancel, or '**Reschedule Appointment**' to reschedule or edit customer details, such as name or phone number. If rescheduling the date or time of the appointment, a new date and time must be chosen using the calendar icons in the appropriate fields 🗓️. A new estimate can also be generated by clicking 'Continue' and proceeding to the next page. An email with updated information will be sent to the provided email address.
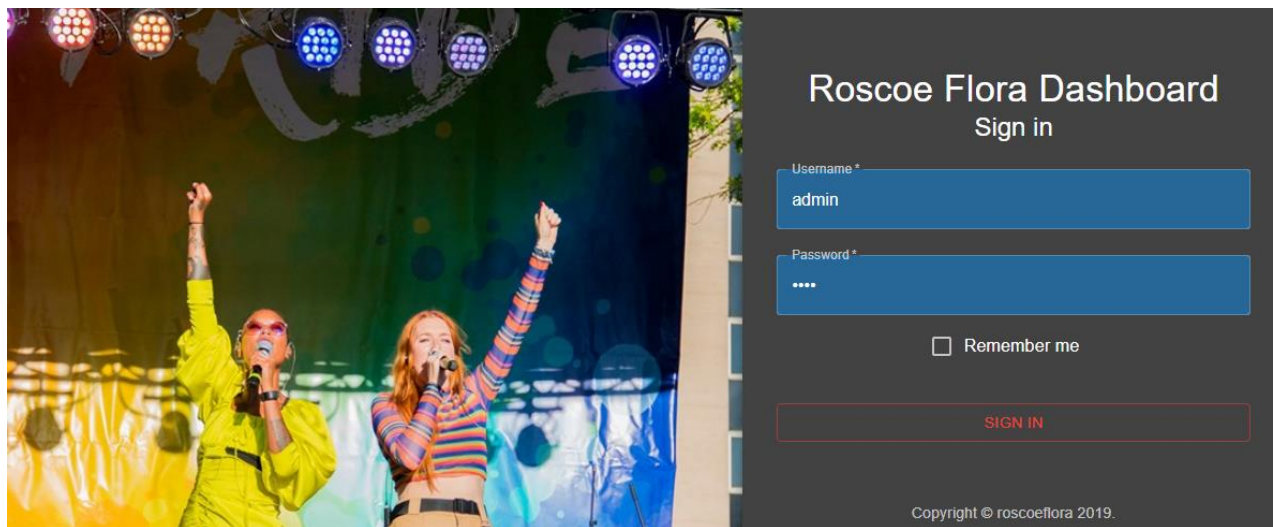
ADMINISTRATOR DASHBOARD

ACCESS AND MANAGEMENT

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The administrator dashboard for Roscoe Flora's website can be accessed via the following URL:

https://www.roscoeflora.com/admin/

* or simply 'roscoeflora.com/admin'.

Upon entering this URL, the user will be greeted with the following page:

In order to login to Roscoe Flora's administrator dashboard, the user will need to enter the username and password they have been provided with into the '**username**' and '**password**' fields. The usernames and passwords are CASE SENSITIVE. To have a non-public or non-shared device remember this login information, check the box beside '**remember me**'. Sign in by selecting '**sign in**'.

If your login information appears to be incorrect, please contact the system's support team.

Note: users of Roscoe Flora's administrator dashboard shall be referred to as 'admin user,' 'administrator,' or simply 'user' throughout this guide.
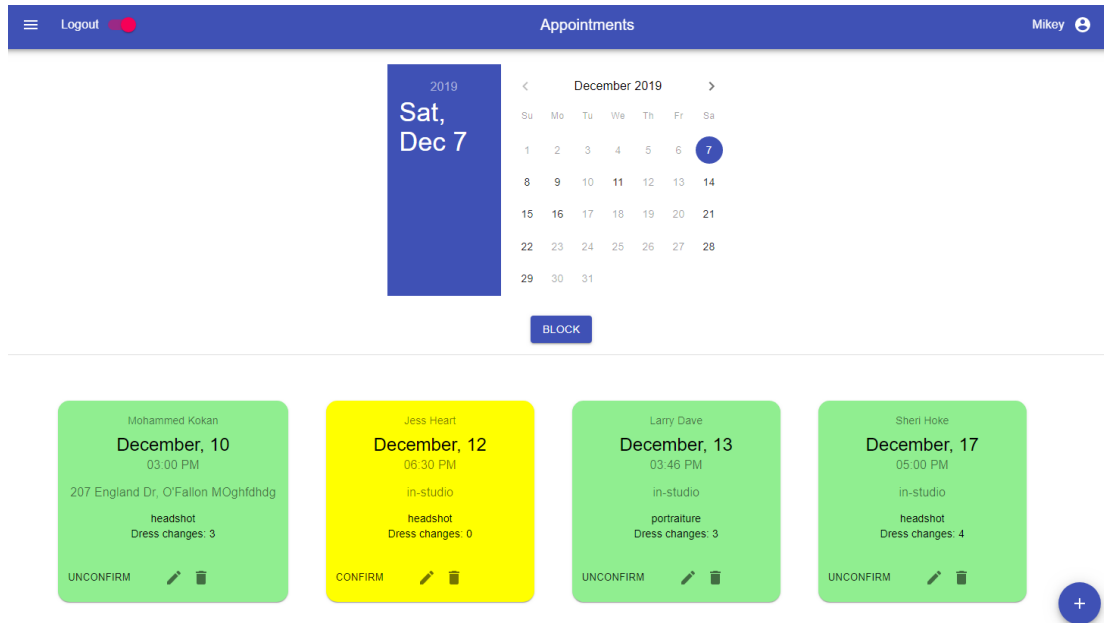
Once signed into the administrator dashboard, the user will be greeted by the following page:
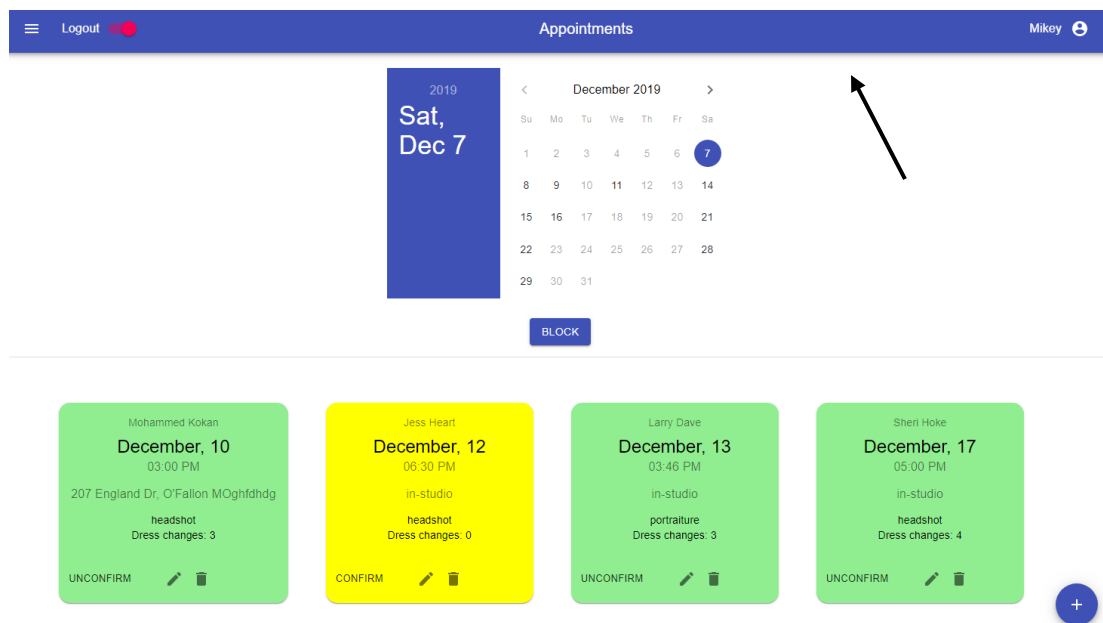
This is the administrator dashboard's home page. It is important to note the **solid blue bar** at the top of the page. This bar provides access to the administrator dashboard's navigation menu , account editor , help index, and logout option . The blue bar will be present on every page of the administrator dashboard, making all of these options readily available no matter where the admin user is within the dashboard.

APPOINTMENTS PAGE

INTRODUCTION

Pictured above is the 'home' page of the administrator dashboard, **appointments**. When logging in to the administrator dashboard, the user will always be brought to the appointments page automatically.

The heart of the appointments page are its **appointment squares**, or '**tiles**'. These tiles represent all requested appointments and contain the client's name, the appointment date and time, requested services, and addresses of photoshoot locations. The tiles are also **color-coded** and sorted by date.

COLOR CODING:

Green = Confirmed appointment.
Yellow = Unconfirmed appointment.
Red = Past due appointment.
Blue = Date that has been manually blocked out.

It is also on the appointments page that the administrator can perform the following tasks:

- Block out specific dates in order to make them unavailable.
- Confirm or unconfirm requested appointments.
- Edit appointments.
- Delete appointments.
- Manually add appointments.

APPOINTMENTS PAGE

BLOCKING OUT DATES
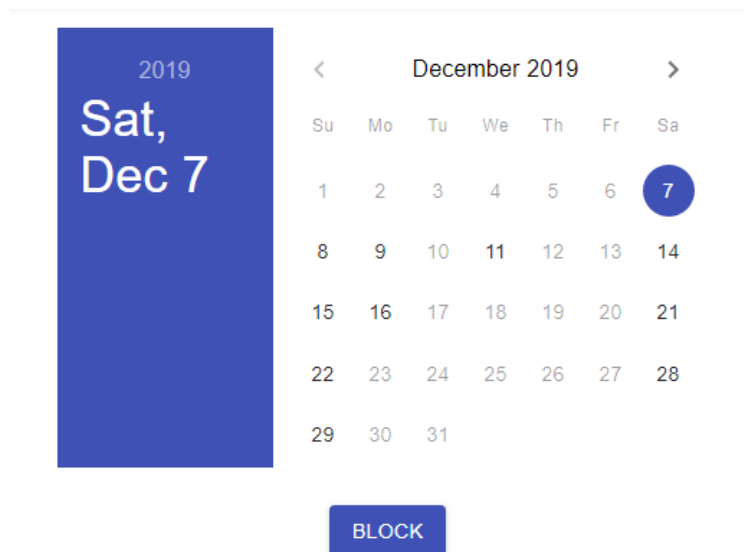
The blue calendar located at the top of the appointments page provides an overview of Roscoe Flora's current availability by month. This same calendar is viewed by clients when scheduling an appointment. Dates in black are not currently booked or requested for appointments and are thus considered 'available'. Dates displayed in light gray have been booked or requested for appointments and are considered 'unavailable'.

Most importantly, this calendar can also be used to **manually block out dates**, marking them as 'unavailable' to clients.

STEP 1: SELECT DESIRED DATE
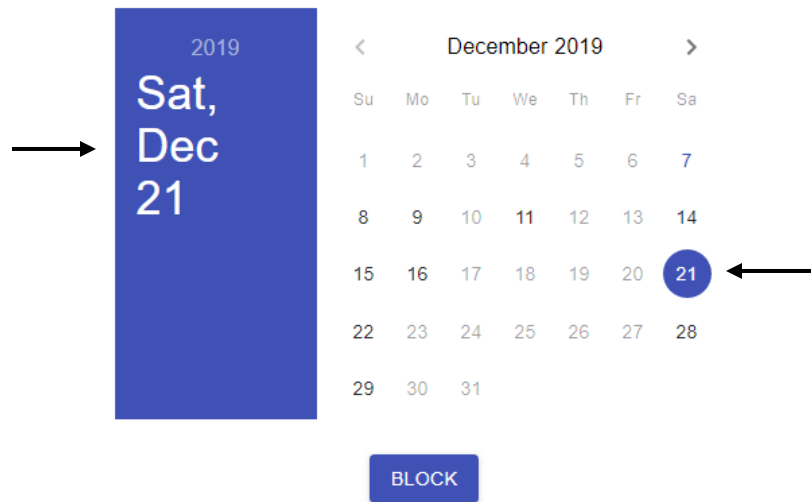
To block out a specific date, select the desired date on the calendar. When selected, the date will then become highlighted by a blue circle and be displayed in the calendar's rectangular blue bar.

STEP 2: BLOCK SELECTED DATE

Once the desired date has been selected, click the large '**block**' button below the calendar. The date will now become grayed out on the calendar, and a new tile will be generated:
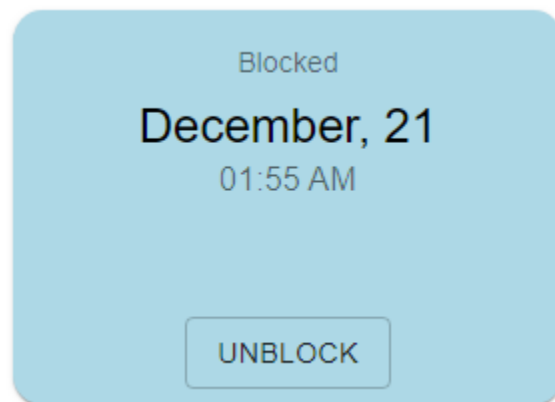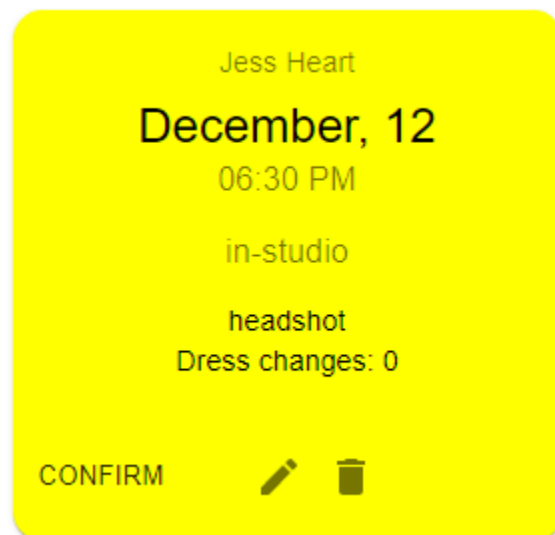
OPTIONAL STEP: DELETE BLOCKED DATE
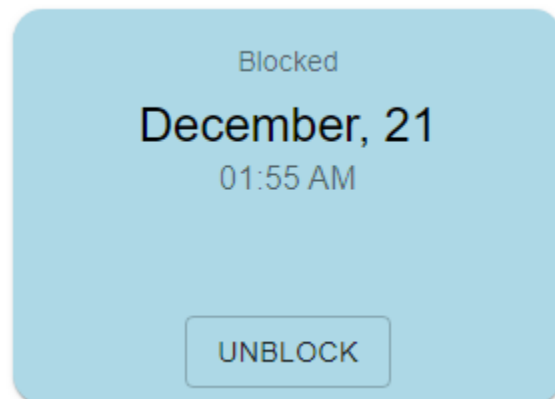
If it has been decided that the blocked date should be made available once more, the block can be removed by deleting the blocked date tile. This can be done by clicking the 'UNBLOCK' button and selecting 'OK' when prompted.

APPOINTMENTS PAGE

APPOINTMENT TILES

Once a client has submitted a request for an appointment, that appointment's information will appear on the appointments page as a new tile color-coded in **yellow**. Appointment tiles are used to confirm, unconfirm, edit, and delete specific appointments.

APPOINTMENTS PAGE

STEP 1: CONFIRMING AN APPOINTMENT
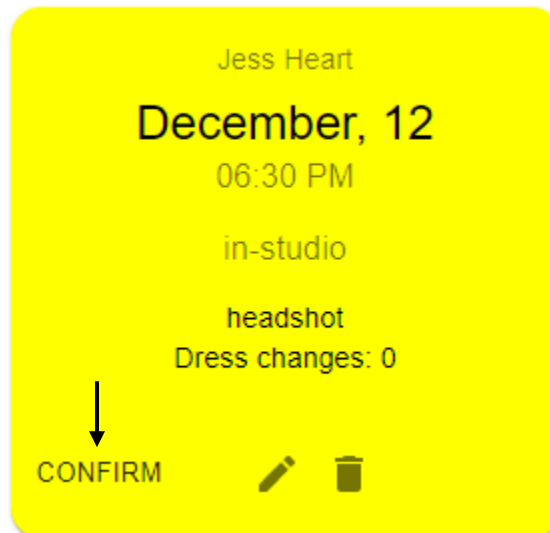
To confirm a requested appointment, the admin user simply needs to select the text reading '**CONFIRM**' located on the bottom left corner of the appointment tile, then select 'OK' when prompted.
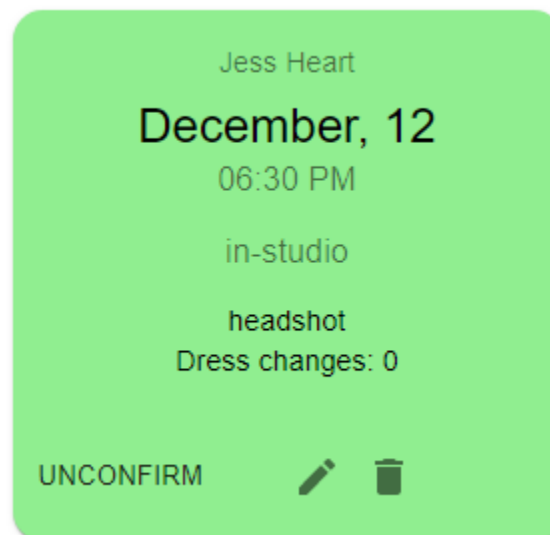
Once an appoint has been confirmed, its tile color will change from yellow to and an email regarding the confirmation will be sent to the client. It may take several seconds for the card color to change.

OPTIONAL STEP: UNCONFIRMING AN APPOINTMENT
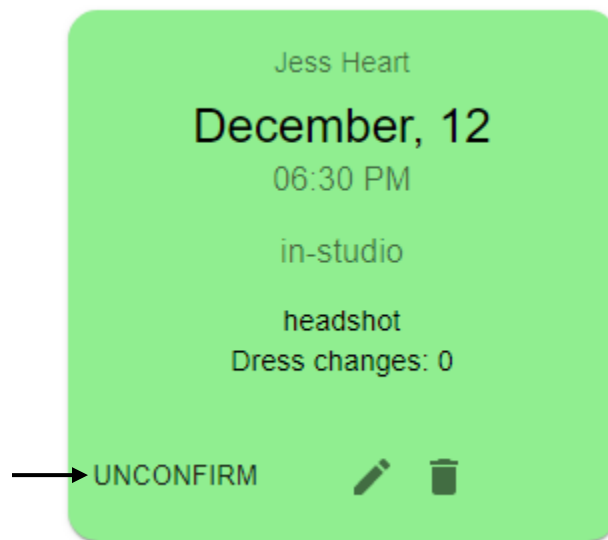
In the event a client becomes unsure about the date of their appointment or any such circumstances, an appointment can be unconfirmed and returned to its status as a yellow tile. To unconfirm an appointment, the user must select '**UNCONFIRM**' in the lower left corner of the appointment tile and 'OK' when prompted. The tile will change from green to yellow.

APPOINTMENTS PAGE
EDITING APPOINTMENTS

At times, it may be necessary for Roscoe Flora to make manual changes to a client's appoint information. Dates, times, contact information, services, and locations can all be changed or updated by the admin user using the appointment editor.

STEP 1: ACCESSING THE APPOINTMENT EDITOR
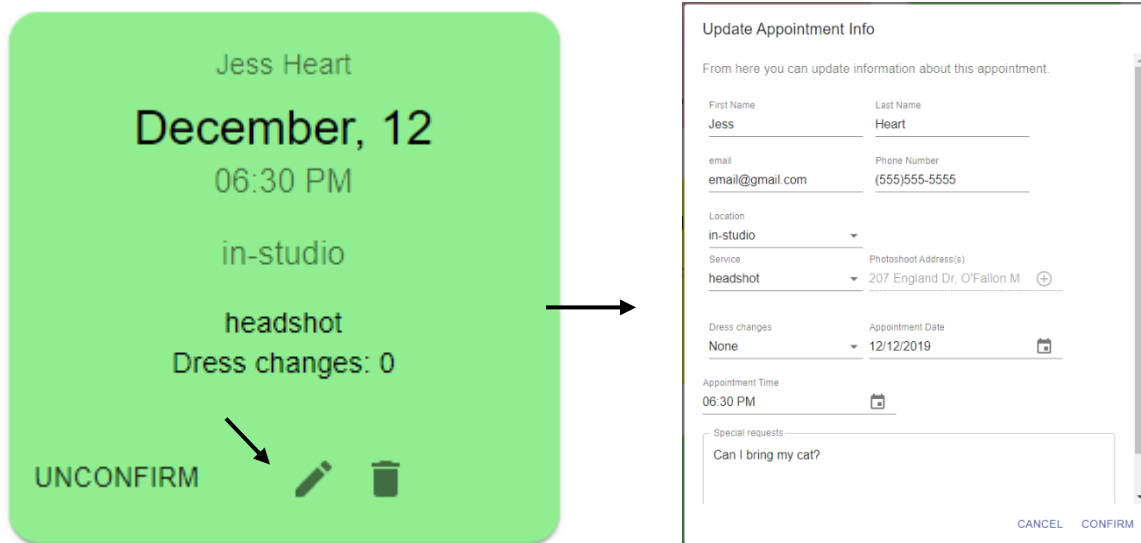
To access the appointment editor, the user simply needs to select the pencil icon 🖊
located at the bottom of the desired appointment tile. A large white box with several
fields will appear in the center of the screen. **ADDITIONAL NOTE:** The appointment
editor will allow the admin user to view the appointment's special requests, if any were
included.

STEP 2: MAKING CHANGES USING THE APPOINTMENT EDITOR

With the appointment editor, the user can change or update the following appointment
information:

- First and last name.
- Email address and phone number.
- Photoshoot locations and addresses.
- Service (portrait, headshot, fashion) and number of dress changes.
- Date and time of appointment.
- Special requests.

Update Appointment Info

From here you can update information about this appointment.

First Name
Jess

Last Name
Heart

email
email@gmail.com

Phone Number
(555)555-5555

Location
in-studio

Service
headshot

Photoshoot Address(s)
207 England Dr, O'Fallon M ⊕

Dress changes
None

Appointment Date
12/12/2019

Appointment Time
06:30 PM

Special requests
Can I bring my cat?

CANCEL   CONFIRM

The client's first and last name, email, and phone number can be changed by typing or altering the existing text in their respective fields.

Update Appointment Info

From here you can update information about this appointment.

First Name
Jessica

Last Name
Heart

email
email@aol.com

Phone Number
(555) 555-3232

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The appointment's location can be changed from 'in-studio' (location is auto-filled for studio photoshoots) to 'out-of-studio,' or 'out-of-studio' to 'in-studio'. When changing from 'in-studio' to 'out-of-studio' but not using the studio at any time during shoot, the studio's address can be removed using the trashcan icon 🗑. This same process can be used to remove any address from the appointment.
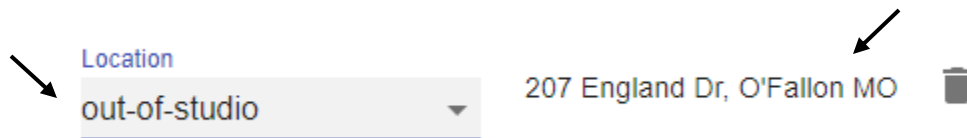
To add a new address to the appointment, the admin user will begin by typing the complete address into the 'photoshoot address(es)' field, which is located to the right of the 'service' field.
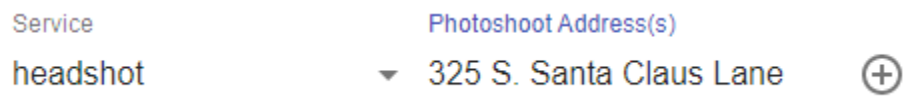
Once the address has been typed into the 'photoshoot address(es)' field, it can be added to the appointment by clicking the add icon ⊕ located on the right side of the field. If the address is not added ⊕, the address will <u>not</u> be saved to the appointment. Once the address has been added, it will now appear to the right of the 'location' field.
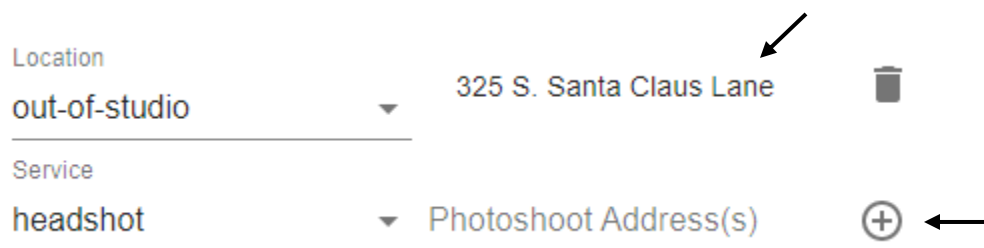
The appointment's choice of service and the amount of dress changes can also be changed by selecting a new option from the popup menu that appears when their respected fields are clicked.

To make changes to the date or time of the appointment, the admin user will need to select the calendar icon 📅 located to the right side of the time or date field.

To choose a new date for the appointment, select the desired day on the miniature calendar that appears after the calendar icon 📅 has been clicked. Once the preferred day has been selected, click anywhere outside of the miniature calendar. This will save the new date into the date field.
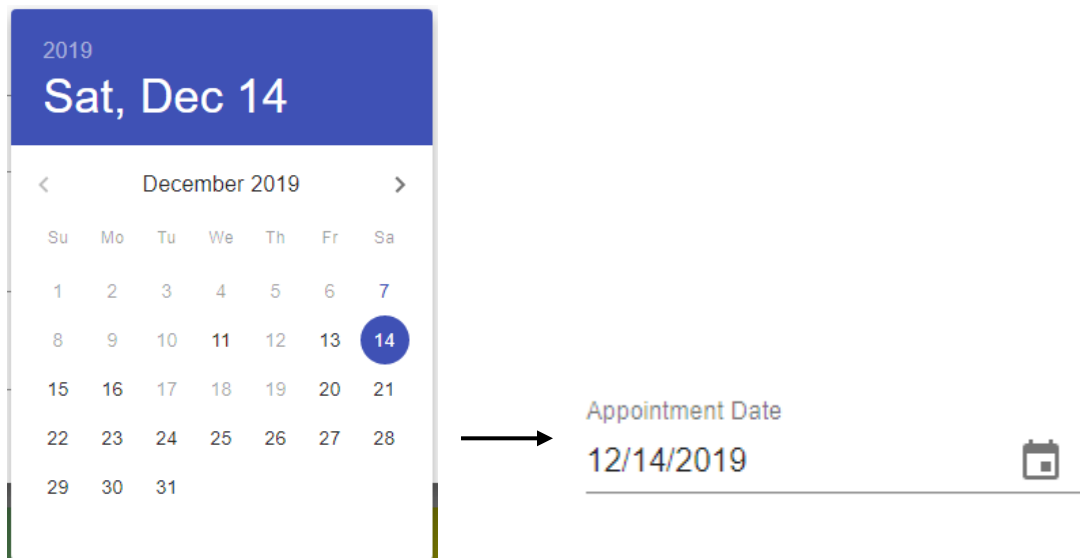
To choose a new time for the appointment, select the desired time on the miniature clockface that appears after the calendar icon 🗓 has been clicked. Once the preferred time, including whether it is AM or PM, has been selected, click anywhere outside of the miniature clockface. This will save the new time into the time field.
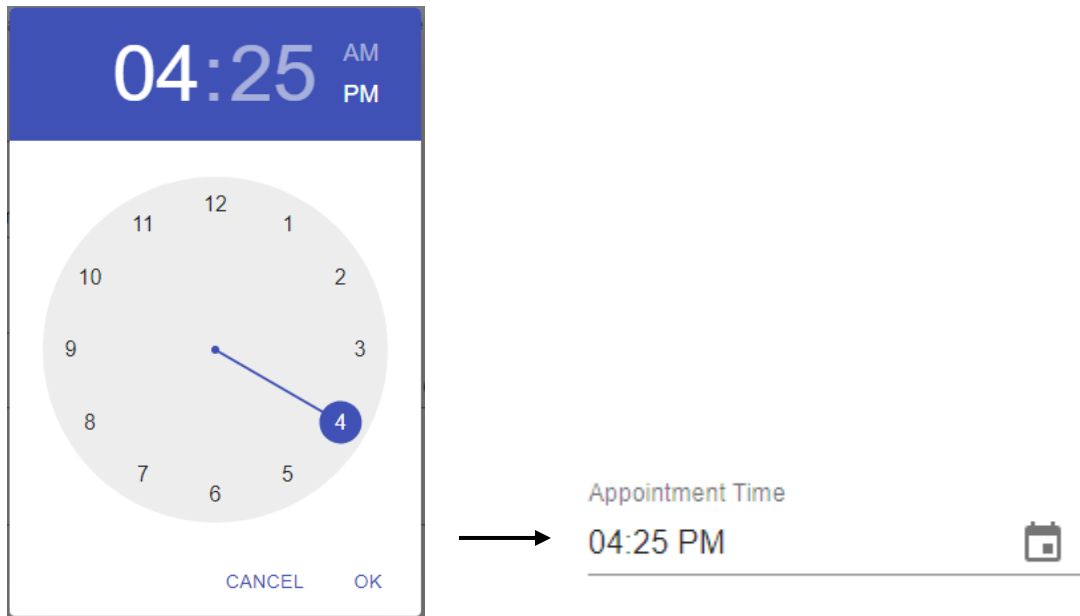
To edit, add, or remove special requests, simply add to or delete text from the 'special requests' field located at the bottom of the form.

Once all necessary changes have been made to the appointment, the admin user will confirm all changes by clicking '**CONFIRM**' in the appointment editor's lower right corner.

fashion ▾	Photoshoot Address(s) ⊕
Dress changes	Appointment Date
Two ▾	12/14/2019 📅
Appointment Time	
04:25 PM 📅	

CANCEL   CONFIRM

All changes should now be saved.

Jess Heart
December, 12
06:30 PM

in-studio

headshot
Dress changes: 0

UNCONFIRM ✏️ 🗑️

→

Jessica Heart
December, 14
04:25 PM

325 S. Santa Claus Lane

fashion
Dress changes: 2

UNCONFIRM ✏️ 🗑️
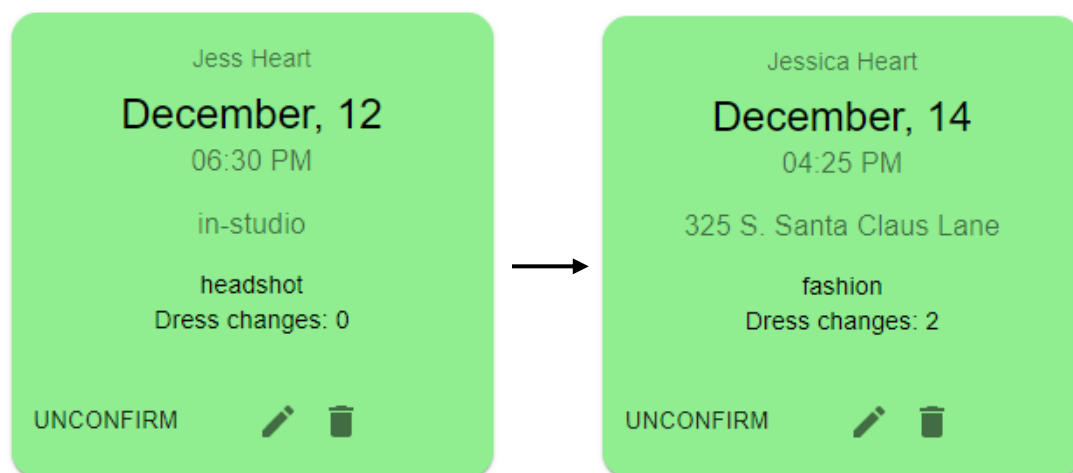
APPOINTMENTS PAGE

DELETING APPOINTMENTS

Appointments and their color-coded tiles can be deleted from the appointments page as necessary.

STEP 1: DELETING AN APPOINTMENT
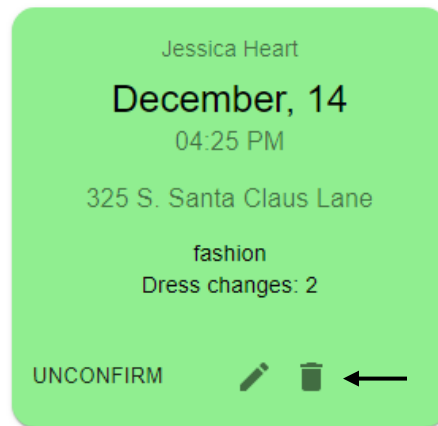
To delete an appointment, locate its color-coded appointment tile within the appointments page. Once located, select the trashcan icon ☐ 'OK' when prompted. The appointment tile should then disappear from the appointments page.

APPOINTMENTS PAGE

At times, Roscoe Flora may take on appointments that have not been requested via its website but still wish to add these appointments to the appointments page for the sake of organization. This can be done with ease.

STEP 1: OPEN THE APPOINTMENT CREATOR

The first step in manually adding an appointment is to open the appointment creator. This is done by clicking the large blue '+' circle located in the appointment page's lower right corner.
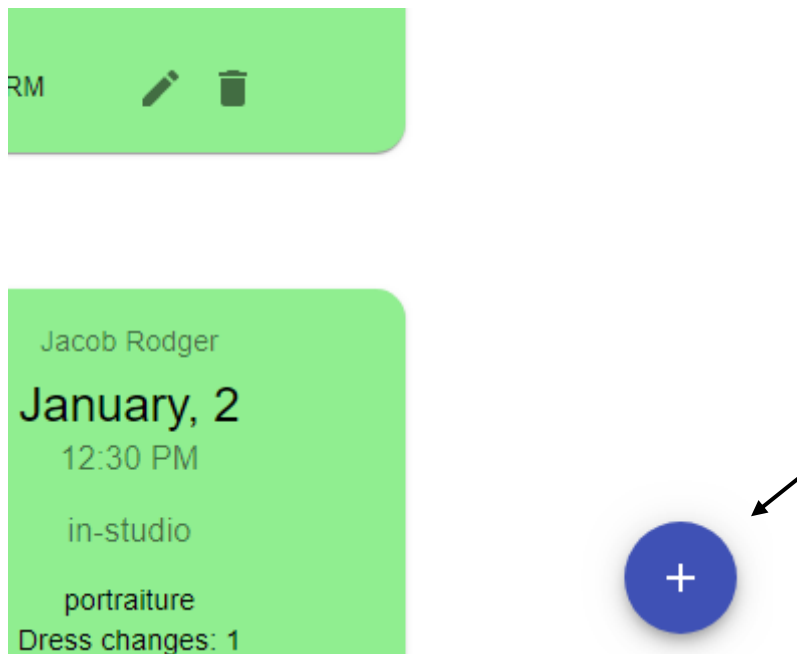
STEP 2: ADD APPOINTMENT INFORMATION

Add Appointment

From here you can add appointments

First Name | Last Name

email | Phone Number

Location
in-studio ▼

Service | Photoshoot Address(s)
fashion ▼ | 207 England Dr, O'Fallon M ⊕

Dress changes
None ▼ | Date picker inline 📅

Time picker 📅

Special requests

CANCEL   CONFIRM

With the appointment creator open, information pertaining to the appointment can be added using the available fields: client name, email, phone number, photoshoot location(s), photoshoot service type, number of dress changes, appointment date and time, and special requests.

Add Appointment

From here you can add appointments

First Name
Jess

Last Name
Heart

email
mail@aol.com

Phone Number
(555)555-4242

The client's first and last name, email, and phone number can be added to the appointment by typing the appropriate information into their respective fields.

Location
out-of-studio ▼

207 England Dr, O'Fallon MO 🗑

The appointment's location can be set to 'in-studio' (location is auto-filled for studio photoshoots) or to 'out-of-studio'.

Service
headshot ▼

Photoshoot Address(s)
325 S. Santa Claus Lane ⊕

To add an address to the appointment for 'out-of-studio' photoshoots, the admin user will begin by typing the complete address into the 'photoshoot address(es)' field, which is located to the right of the 'service' field.

Once the address has been typed into the 'photoshoot address(es)' field, it can be added to the appointment by clicking the add icon ⊕ located on the right side of the field. If the address is not added ⊕, the address will not be saved to the appointment. Once the address has been added, it will now appear to the right of the 'location' field.

An appointment's choice of service and the amount of dress changes can also be added by selecting the desired option from the popup menu that appears when the respected fields are clicked.

To add the appointment's date or time, the admin user will need to select the calendar icon ▦ located to the right side of the time or date field.
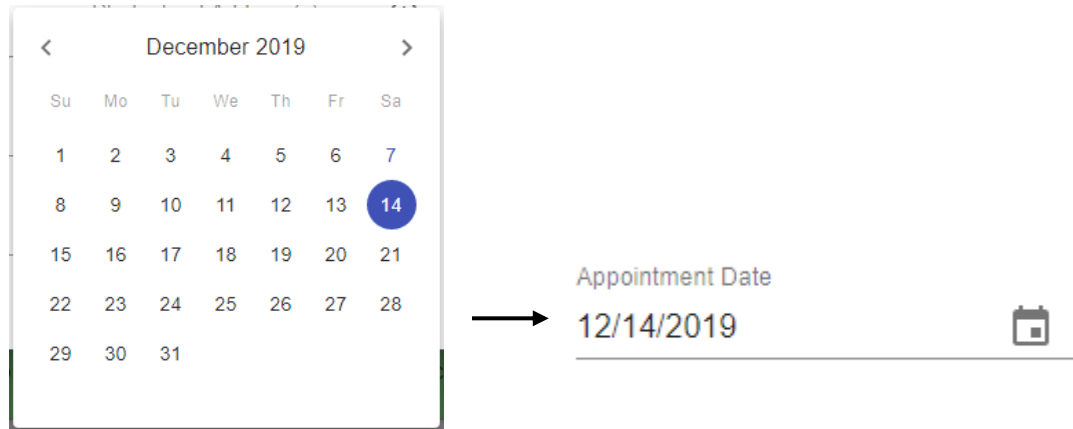
To choose a date for the appointment, select the desired day on the miniature calendar that appears after the calendar icon ▦ has been clicked. Once the preferred day has been selected, click anywhere outside of the miniature calendar. This will save the appointment's date into the date field.

NOTE: the admin user can choose any day for manually added appointments, even days that have be blocked out.
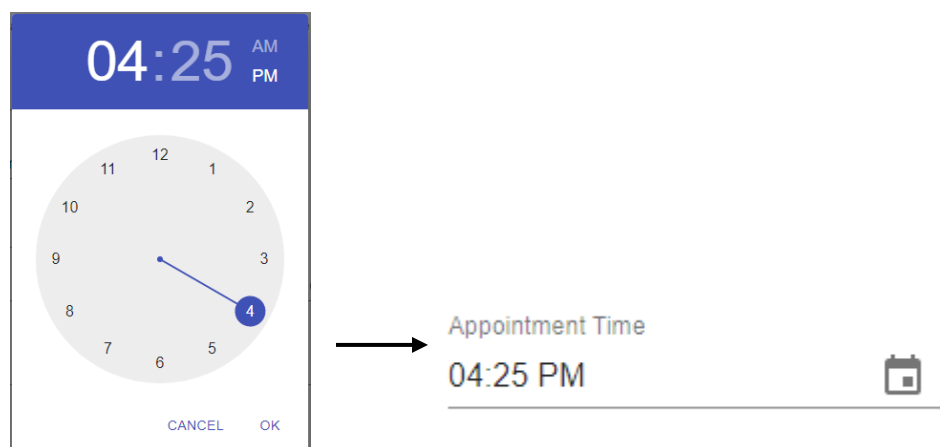
To choose a time for the appointment, select the desired time on the miniature clockface that appears after the calendar icon ▦ has been clicked. Once the preferred time, including whether it is AM or PM, has been selected, click anywhere outside of the miniature clockface. This will save the appointment's time into the time field.

Appointment Time

06:30 PM

Special requests

Can I bring my cat?

To edit, add, or remove special requests, simply add to or delete text from the 'special requests' field located at the bottom of the form.

STEP 3: CREATE THE APPOINTMENT

Once all applicable appointment information has been added into the appointment creator's fields, the admin user will confirm the creation of the new appointment by clicking '**CONFIRM**' in the appointment editor's lower right corner and selecting 'OK' when prompted.

fashion   Photoshoot Address(s)   ⊕

Dress changes   Appointment Date
Two   12/14/2019

Appointment Time
04:25 PM

                                      CANCEL   CONFIRM

Jess Heart
December, 14
04:25 PM

325 S. Santa Claus Lane

fashion
Dress changes: 2

CONFIRM

The appointment has now been created and its color-coded tile card will appear on the appointments page. This manual appointment will initially appear as a yellow tile. Once it has been marked as 'confirmed,' it will change to green and a confirmation email will be sent to the email address provided within the appointment information.

PRICE ADJUSTMENT PAGE

As the business grows, Roscoe Flora may wish to change the prices of their services and have these new prices reflected in both the website's client-facing 'services' page (roscoeflora.com/services), and within the client-facing 'appointment' page's (roscoeflora.com/appointment) price estimator. This goal can be achieved using the administrator dashboard's **price adjustment page**.

STEP 1: NAVIGATING TO THE PRICE ADJUSTMENT PAGE

To access the price adjustment page of the administrator dashboard, open the navigation menu by clicking the menu icon ☰ located in the top left corner of the dashboard within the blue bar.
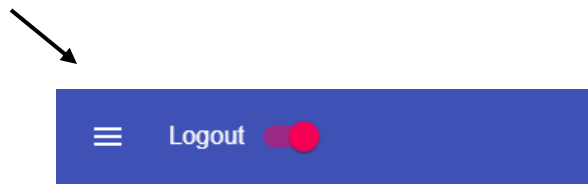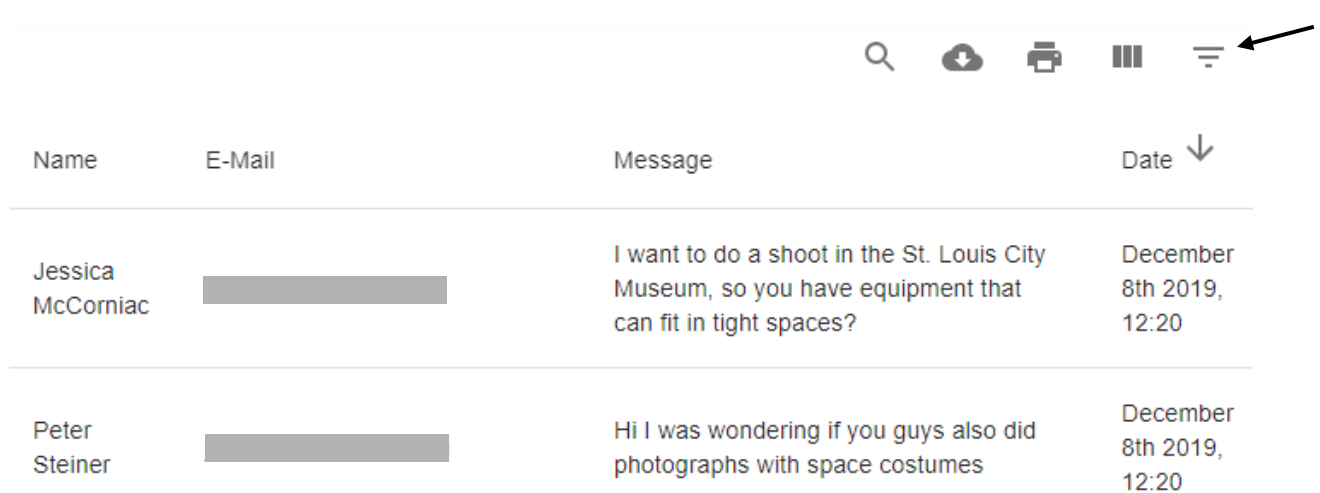

With the navigation menu open, select 'Pricing'.
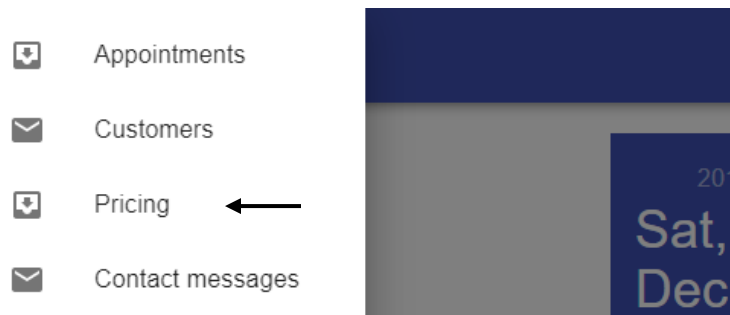
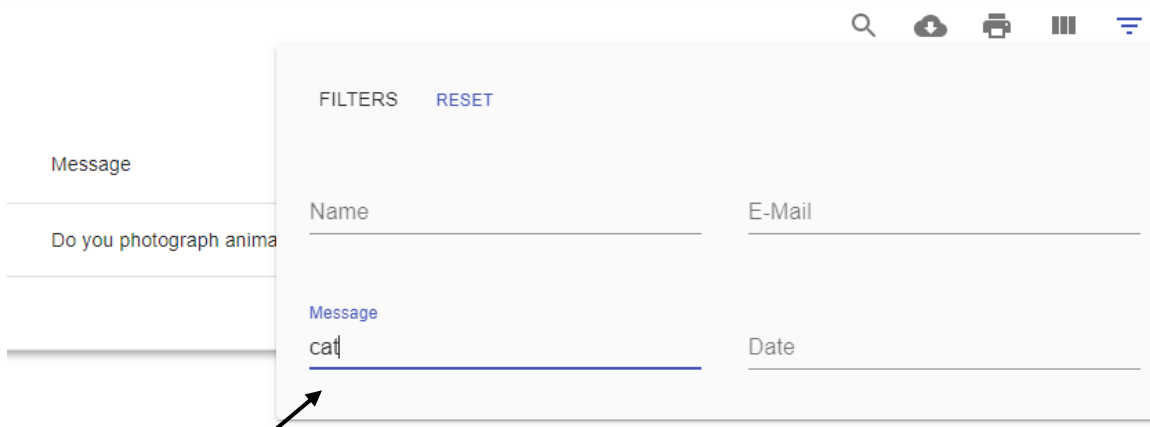The price adjustment page will now be displayed.

STEP 2: ENTERING PRICE CHANGES

	Pricing
☰ Logout 🔴	

Cost Type	Price	Amount Free
Headshot	$ 80	
Portraiture	$ 100	
Fashion	$ 100	
In-studio	$ 70	
out-of-studio	$ 60	
Dress Changes	$ 10	2
Locations	$ 20	2

SET PRICES

The price adjustment page displays a list of all services and additional options Roscoe Flora offers, fields containing the prices of each service and additional option, and fields denoting the amount of dress and location changes that will be granted freely before fees become attached.

out-of-studio	$ 70	
Dress Changes	$ 16	1
Locations	$ 27	3

Each field can be changed to reflect the increase or decrease in price of its corresponding service, such as an increase in the price of an out-of-studio shoot from $60 to $70. The 'amount free' fields can be changed to reflect the amount of dress and location changes that are offered before a fee is applied.

STEP 3: CONFIRMING PRICE CHANGES

Once the desired price changes have been made, the admin user can confirm the changes by selecting '**SET PRICES**'. The updated prices will immediately be reflected in both the website's client-facing 'services' page (roscoeflora.com/services), and within the client-facing 'appointment' page's (roscoeflora.com/appointment) price estimator.

CONTACT MESSAGES

Roscoe Flora's client-facing website contains a contact form (roscoeflora.com/contact) that allows potential clients and fans to quickly send in their questions and comments. These messages are then archived in the administrator dashboard's **contact messages** page so that they may be viewed at any time.

STEP 1: NAVIGATING TO THE CONTACT MESSAGES PAGE

To access the contact messages page of the administrator dashboard, open the navigation menu by clicking the menu icon ☰ located in the top left corner of the dashboard within the blue bar.
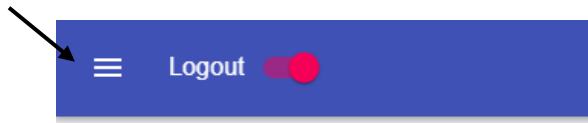
With the navigation menu open, select 'contact messages'.
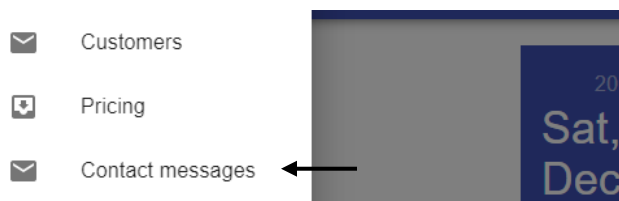
The contact messages page will now be displayed.

STEP 2: SORTING AND SEARCHING CONTACT MESSAGES

The contact messages page will display the name, email address, message contents, and send date of all messages sent via Roscoe Flora's contact form (roscoeflora.com/contact). Messages can be sorted alphabetically by name by clicking '**Name**' above the name column and date by clicking '**Date**' above the date column (pictured above). When sorted by either option, an arrow icon ↑ will appear beside the chosen option.
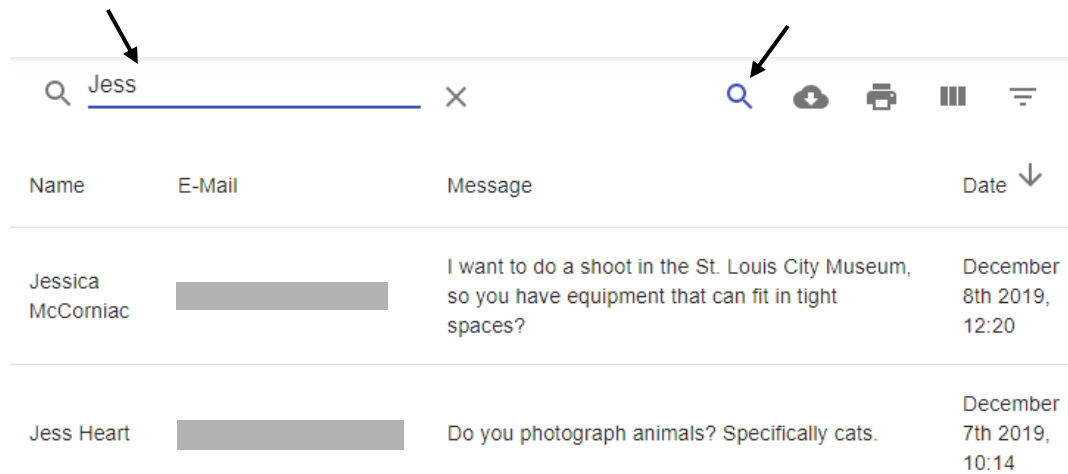
Contact message can also be sorted by specific names, email addresses, message contents (singular words or phrases), or dates by clicking the 'filter table' icon ☰ in the top right corner.
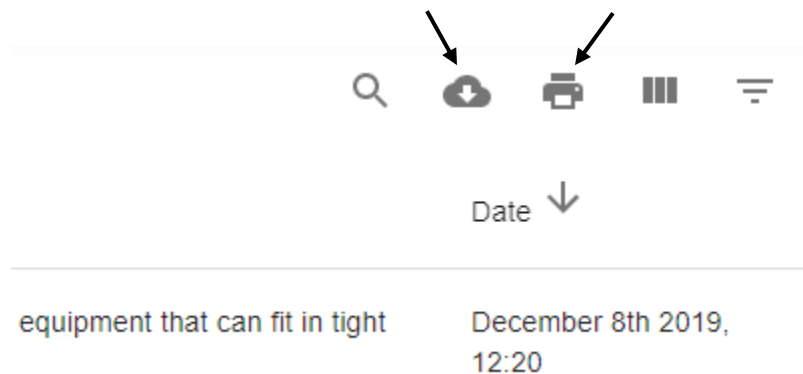
In addition to sorting and filters, contact messages can be searched by keyword or phrase. To search messages, select the magnifying glass icon 🔍 in the upper right corner. A search field will then appear to the magnifying glass icon's left.

Lastly, specific columns can be excluded from display by clicking the 'view columns' icon ||| in the top right corner.

STEP 3: DOWNLOADING AND PRINTING CONTACT MESSAGES

Contact messages can be printed by selecting the printer icon 🖨 in the upper right corner. If on a device connected to a printer, selecting the print option will bring up the device's print menu. Contact messages can also be downloaded as a .csv (comma-separated values) file, which can be opened and viewed using Microsoft Excel, by selecting the download icon ⬇.

STEP 4: RESPONDING TO CONTACT MESSAGES

In order to respond to contact messages, the admin user must use their own personal email account. The email address of the desired sender should be highlighted and copied from the contact messages page. Once the email address has been copied, it can be pasted into the 'to:' field of an email message within the admin user's personal email account and a response written and sent.

CUSTOMERS PAGE

Roscoe Flora's customer data is saved to the 'customer' page whenever an appointment request is made. This data remains even after an appointment has been completed or deleted from the dashboard.

STEP 1: NAVIGATING TO THE CUSTOMERS PAGE

To access the customer page of the administrator dashboard, open the navigation menu by clicking the menu icon located in the top left corner of the dashboard within the blue bar.
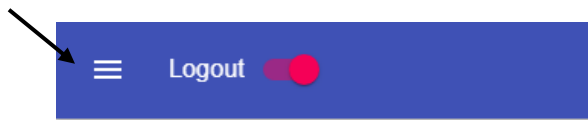
With the navigation menu open, select 'customers'.
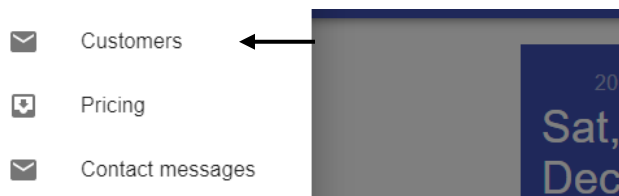
The customers page will now be displayed.

STEP 2: SORTING AND SEARCHING CUSTOMERS

The customers page will display the first and last name, email address, phone number, and send date of all customers that have requested appointments, past and present. Customers can be sorted alphabetically by name by clicking '**First Name**' or '**Last Name**' above the name column and date by clicking '**Date**' above the date column (pictured above). When sorted by either option, an arrow icon ↑ will appear beside the chosen option.

Customers can also be sorted by specific first and last names, email addresses, phone numbers, or dates by clicking the 'filter table' icon ☰ in the top right corner.

First Name ↓	Last Name	E-Mail	Phone	Initail Contact Date
Tom	Sawyer			November 18th 2019, 10:11
robin	williams			November 18th 2019, 10:14
Pat	Steiner			November 18th 2019, 10:10

In addition to sorting and filters, customers can be searched manually by keyword or name. To search messages, select the magnifying glass icon 🔍 in the upper right corner. A search field will then appear to the magnifying glass icon's left.

Lastly, specific columns can be excluded from display by clicking the 'view columns' icon ⦀ in the top right corner.

STEP 3: DOWNLOADING AND PRINTING CUSTOMERS

|	Phone	Initail Contact Date
om		November 18th 2019, 10:11

The customer list can be printed by selecting the printer icon 🖨 in the upper right corner. If on a device connected to a printer, selecting the print option will bring up the device's print menu. The customer list can also be downloaded as a .csv (comma-separated values) file, which can be opened and viewed using Microsoft Excel, by selecting the download icon ☁.
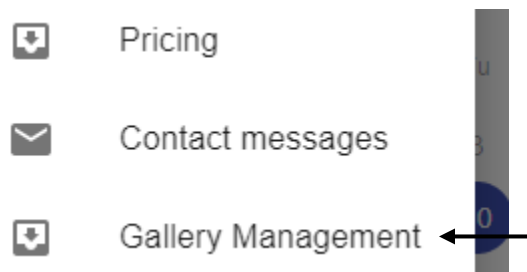
GALLERY MANAGEMENT

Roscoe Flora's client-facing website features a 'portfolio' page (roscoeflora.com/portfolio), which serves as a gallery for the business' photography work. As Roscoe Flora is a photography business, this portfolio will need to be updated regularly to show off new and interesting works.

STEP 1: NAVIGATING TO THE CONTACT MESSAGES PAGE

To access the gallery management page of the administrator dashboard, open the navigation menu by clicking the menu icon located in the top left corner of the dashboard within the blue bar.
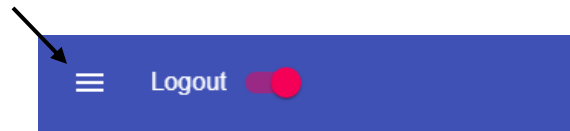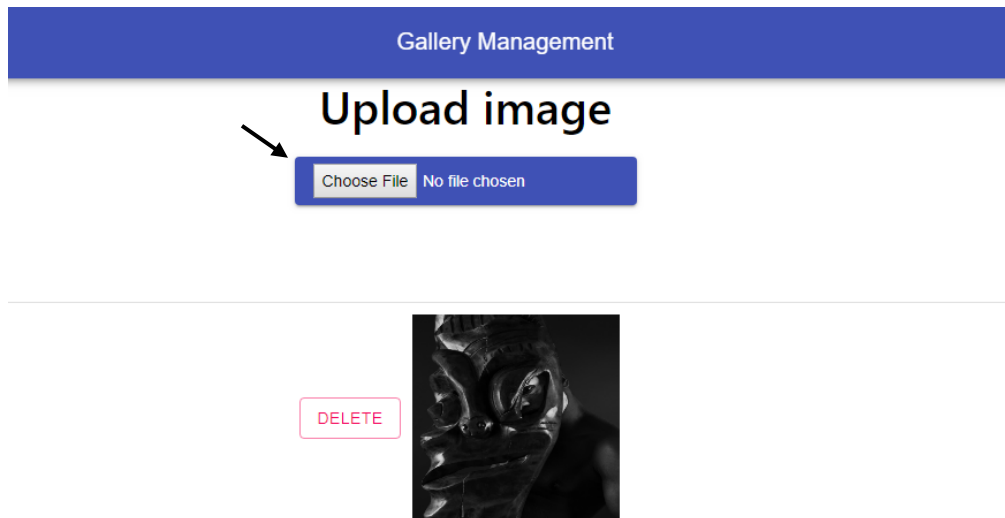

With the navigation menu open, select 'gallery managemnet'.

The gallery management page will now be displayed.

STEP 2: UPLOADING NEW IMAGES TO GALLERY

The gallery management page features a file uploader, previews of uploaded images, and the option to delete images. In order to **upload** images to the gallery, the admin user will select the 'choose file' button located just below the large 'upload image' text. This will open up the device's file explorer.
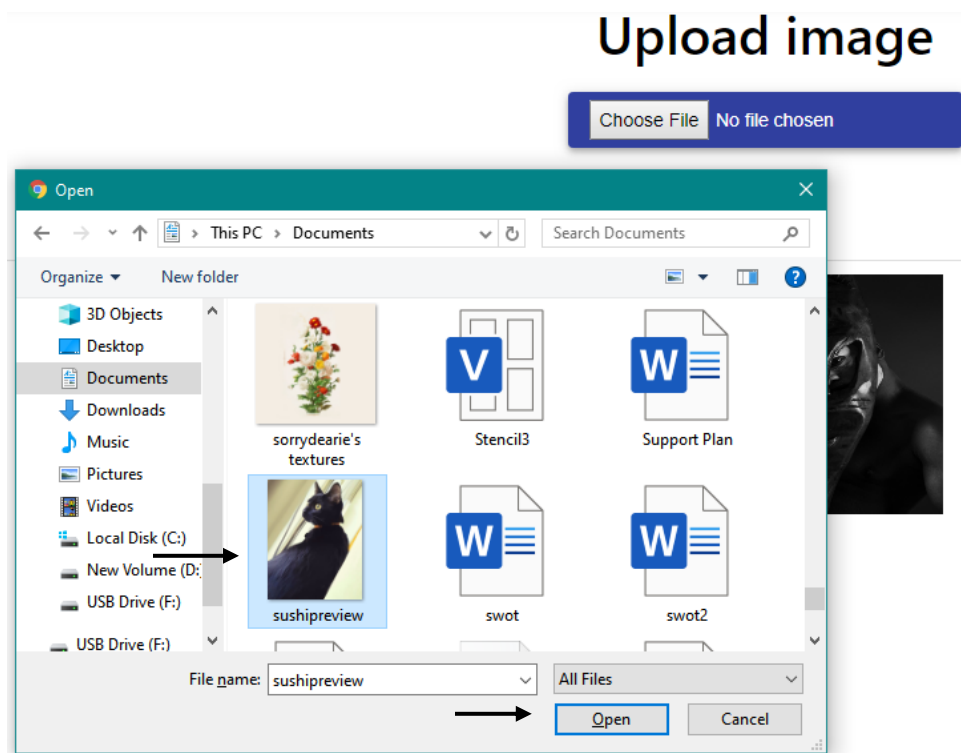
The example above shows the Microsoft Windows file explorer. With the file explorer open, the admin user will need to locate the desired image on their device. Once located, the image will need to be selected and 'opened' using the explorer. This will

add the image to the image uploader. **IMPORTANT NOTE:** The image's file size <u>cannot</u> exceed 10MB and only one image can be selected at a time.
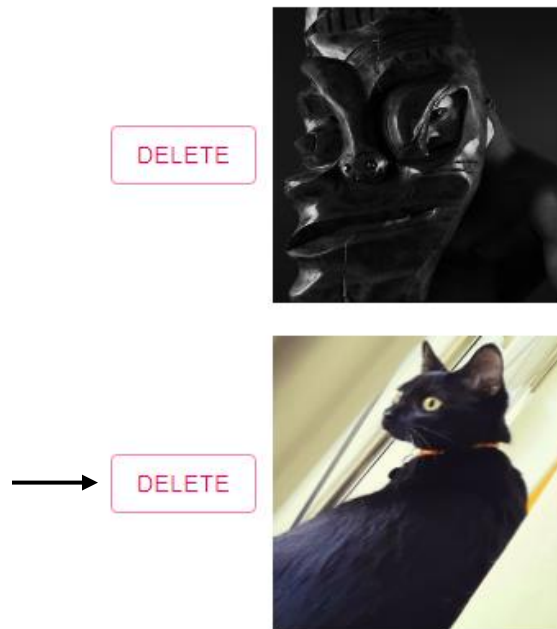

The selected image will be shown as a preview once it has been added to the uploader. If satisfied, the image can be stored in the gallery by selecting 'CLICK TO STORE'. It will take <u>several seconds</u> for the image to appear below. Once stored, the image will then be displayed in the website's 'portfolio' page.

STEP 3: REMOVING IMAGES FROM THE GALLERY

Removing an image from the gallery is simple. Locate the desired image preview below the 'CLICK TO STORE' button on the gallery management page, then select the 'DELETE' button beside the image preview. This will remove the image from both the website's 'portfolio' gallery and the list of image previews.
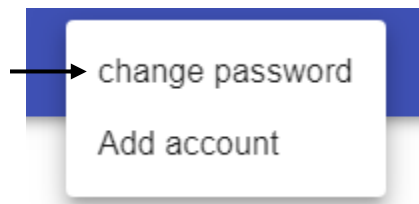
ADMINISTRATOR DASHBOARD: CHANGING PASSWORD

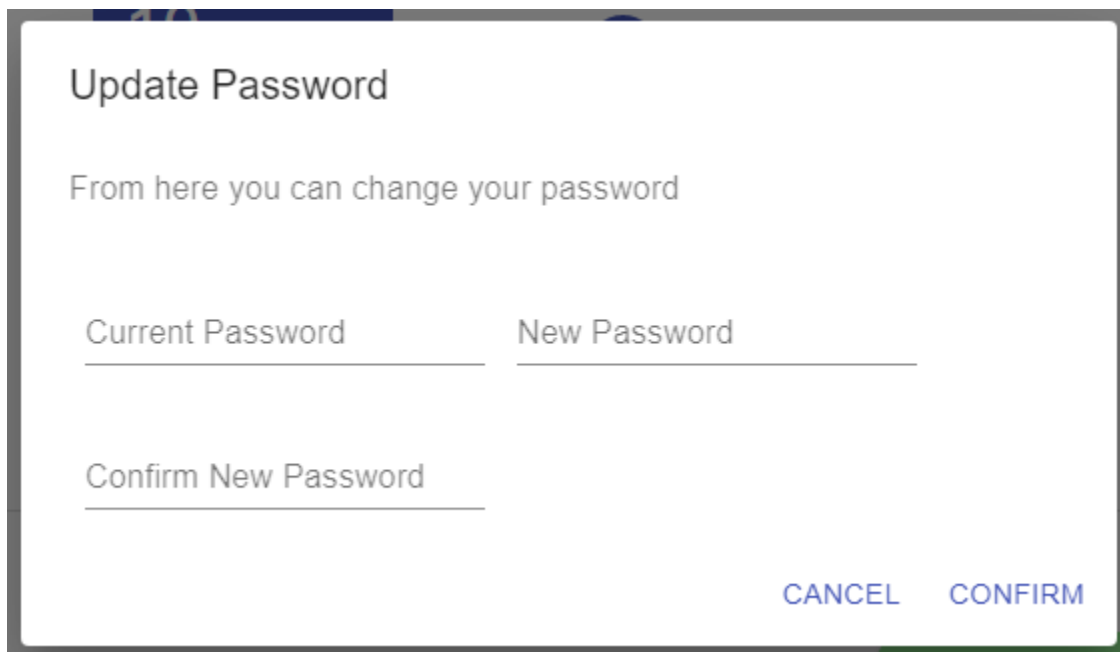If necessary, the administrator account password can be changed.

STEP 1: OPENING THE ACCOUNT EDITOR MENU

Locate the account editor icon in the upper right corner of the administrator dashboard. Once located, select the icon to open the account editor menu.

STEP 2: CHANGING YOUR PASSWORD

To change your administrator account password, select 'change password' within the account editor menu. This will bring up the password editor, which appears as a white box in the middle of the administrator dashboard.

Type in the administrator account's current password in the first field, followed by the new password in the second field. The new password will then need to be confirmed in the third field. Once the passwords have been entered and match, confirm the change

by selecting 'CONFIRM' in the lower right corner. The administrator account password has now been changed. **NOTE:** This will only change the currently logged in administrator account's password, not the passwords of other administrator accounts. To change the password of another accounts, the user must login under the preferred account and follow the steps above.

ADDING ADIMIN ACCOUNTS

In the future, it may be necessary for Roscoe Flora to grant new users access to its system. Additional administrator accounts can be created using the 'add account' option within the account editor menu.

STEP 1: OPENING THE ACCOUNT EDITOR MENU

Locate the account editor icon in the upper right corner of the administrator dashboard. Once located, select the icon to open the account editor menu.

STEP 2: ADDING NEW ADMINISTRATOR ACCOUNTS
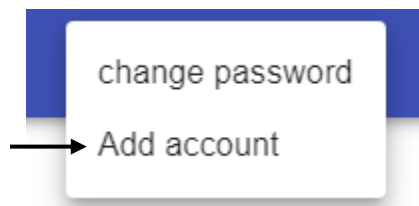
To add a new administrator account, select 'add account' within the account editor menu. This will bring up the account creator, which appears as a white box in the middle of the administrator dashboard.

Add Admin Account

From here you can add additional accounts

Username   Password

Confirm Password

                                    CANCEL   CONFIRM

Type in the new administrator account's preferred username in the first field, followed by the account's preferred password in the second field. The password will then need to be confirmed in the third field. Once the passwords have been entered and match, confirm the addition of the new account by selecting 'CONFIRM' in the lower right corner. The administrator account has now been added and can be used to log in to the administrator dashboard.