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SHORTCUTS FUSION APPOINTMENT BOOK

UNDERSTANDING
APPOINTMENT NOTES AND
EMPLOYEE MESSAGES

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SMARTER BUSINESS TECHNOLOGY

it suits you

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ABOUT THIS DOCUMENT

Employee messages and appointment notes allow you to communicate with your fellow team members through the Appointment Book. An employee message should be used when you want to direct the message at a specific employee. For example, you could add an employee message to remind them of a task they need to do, or to let them know that they missed a phone call.

Appointment notes are a convenient way to leave a notification about a specific appointment. Notes can be added to an entire appointment, or an individual service block. For example, you could leave an appointment note to let a team member know that a client will be late to their appointment. This is particularly useful if different blocks of an appointment are scheduled with different employees.

Once an employee message or an appointment note has been added, an icon will appear on the Appointment Book to notify the person know that a note/message is present.

ADDING APPOINTMENT NOTES

- 1 Click on the **main** menu.
 - 2 Click on the **appointments** icon.
 - 3 Right click on the relevant appointment.
 - 4 Select **notes**.
 - 5 Click on the notes field next to the relevant appointment block.
 - 6 Type in your note.
 - 7 Click **done**.
- A** Notes are indicated by a yellow note icon in the top right corner of an appointment block. Any other blocks belonging to the same appointment, which don't have a note, will have a faded note icon.

The screenshot displays a software interface for managing appointments. At the top, a navigation bar includes a 'SHORTCUTS' menu with icons for 'Main', 'Appointments', 'Arrivals', 'Walkin Manager', 'Point Of Sale', 'Clients', 'Performance', and 'Exit'. The main area is a calendar grid for Monday, 29 Feb '16, showing appointments for staff members Anna, James, Lucy, Chris, and Katie. A context menu is open over an appointment for Rachael Clarke, with 'Notes' selected. A dialog box titled 'Appointment Notes for Rachael Clarke on 29/02/2016' is shown, containing a table of appointment blocks and a 'Notes' field with the text 'Client will be 15 minutes late.' The dialog has 'Delete', 'Delete All', and 'Done' buttons at the bottom.

Time	Staff	Client	Service	Status
9:00 AM	Anna	Vicky Beckhouse	Up Do	Booked
10:00 AM	James	Andy Ellis		Booked
11:00 AM	James	Joshua Bates		Booked
12:00 PM	James	Nicole McDonald		Booked
1:00 PM	James	Melissa Nguyen		Booked
2:00 PM	Lucy	Cameron Porter	60 min Massage	Booked
3:00 PM	Lucy	William Black		Booked
4:00 PM	Lucy	Katie Morrison	Ladies Style Cut	Booked
5:00 PM	Chris	Olivia Black	1/4 Head Highlights	Booked

VIEWING APPOINTMENT NOTES

- 1 Click on the **main** menu.
- 2 Click on the **appointments** icon.
- 3 Right click on the relevant appointment.
- 4 Select **notes**. The notes window will appear, allowing you to view the notes.

The screenshot displays a salon management software interface. At the top, there's a header with the date 'Mon, 29 Feb' and staff names: Anna, James, Lucy, Chris, and Katie. Below this is a calendar grid showing appointments for various staff members. A sidebar on the left contains a time slot menu (9:00 AM to 5:00 PM) and a list of appointment actions like 'Arrived', 'Checkout', 'Change Service', etc. A 'Notes' window is open over an appointment, showing a list of 'Blocks' and 'Notes' for 'Rachael Clarke on 29/02/2016'. The notes include '1/4 Head Highlights' with a note 'Client will be 15 minutes late.' and 'Finish'. At the bottom of the notes window are buttons for 'Delete', 'Delete All', and 'Done'. On the right side, there's a 'SHORTCUTS' menu with icons for 'Main', 'Appointments', 'Arrivals', 'Walkin Manager', 'Point Of Sale', 'Clients', 'Performance', and 'Exit'. At the very bottom right, there's a user profile for 'Anna Owner' with a 'Log Off' button.

DELETING APPOINTMENT NOTES

- 1 Click on the **main** menu.
- 2 Click on the **appointments** icon.
- 3 Right click on the relevant appointment.
- 4 Select **notes**.
- 5 Click on the note you wish to delete to select it.
- 6 Click **delete** to remove the selected note, or click **delete all** to remove all notes from the appointment.
- 7 Click **done**.

The screenshot shows a scheduling software interface for Monday, 29 Feb. The main calendar grid displays appointments for staff members: Anna, James, Lucy, Chris, and Katie. A context menu is open over an appointment, and a sub-menu titled 'Appointment Notes for Rachael Clarke on 29/02/2016' is displayed. The sub-menu shows a list of notes, with one selected. The 'Delete' button is highlighted.

Time	Anna	James	Lucy	Chris	Katie
9:00 AM		Chelsea Grey	Off	Xavier Scott	RDO
15	Vicky Beckhouse	Chelsea Grey	Off	Xavier Scott	RDO
30			Off		RDO
45	Vicky Beckhouse Up Do		Off		RDO
10:00 AM		Andy Ellis	Off	Allison Tenby Blowdry	RDO
15			Off		RDO
30		Joshua Bates	Off		RDO
45		Joshua Bates	Off		RDO
11:00 AM			Off	Isabella Weeks Full Head Highlights 0411 666 989	RDO
15	Arrived		Off		RDO
30	Checkout	Nicole McDonald	Off		RDO
45	Undo Confirmed		Off		RDO
12:00 PM		Melissa Nguyen	Off		RDO
15	No Show		Off		RDO
30			Off		RDO
45	Change Service		Off	Isabella Weeks	RDO
1:00 PM		Off			RDO
15	Select	Off	Claire Stewart Microdermabrasian		RDO
30		Off		Lunch	RDO
45	Tag	Off			RDO
2:00 PM	CPC	Off	Cameron Porter 60 min Massage 0466 111 666		RDO
15	Notes	Off			RDO
30	Recur	Off			RDO
45	View Week	Off	William Black	Natasha Grey Ladies Style Cut	RDO
3:00 PM	Add to Group	Off	Katie Morrison Ladies Style Cut		RDO
15	Extra	Off		Brenda Peters Body Scrub	RDO
30	Delete	Off			RDO
45		Off	Olivia Black 1/4 Head Highlights		RDO
5:00 PM		Melanie Goodman			RDO
15		Melanie Goodman			RDO
30					RDO
45					RDO

The 'Appointment Notes for Rachael Clarke on 29/02/2016' sub-menu shows the following notes:

- 1/4 Head Highlights
- 1/4 Head Highlights (Selected) - Client will be 15 minutes late.
- Finish

The 'Delete' button is highlighted in the sub-menu.

ADDING AN EMPLOYEE MESSAGE

- 1 Click on the **main** menu.
- 2 Click on the **appointments** icon.
- 3 Right click on the relevant employee's picture.
- 4 Select **message**.
- 5 Type in your message.
- 6 Click **done**.

The screenshot displays a scheduling software interface. On the left is a vertical time slot column from 9:00 AM to 5:00 PM. The main area is a grid with columns for employees: Anna, James, Chris, and Katie. A context menu is open over James's name, with 'Message' selected. An 'Employee Message' dialog box is overlaid at the bottom, containing the text 'Peter called and wants you to call him back.' and a 'Done' button. On the right, a 'SHORTCUTS' sidebar includes icons for Main, Appointments, Arrivals, Walkin Manager, Point Of Sale, Clients, Performance, and Exit, along with 'Tools', 'Stock', 'Setup', and a 'Log Off' button for Anna, Owner.

VIEWING AN EMPLOYEE MESSAGE

- 1 Click on the **main** menu.
- 2 Click on the **appointments** icon.
- A If an employee message is present, a message icon will be displayed next to the employee picture.
- 3 Click on the relevant employee's picture to view additional information, including the employee message.

The screenshot shows a software interface for a salon. At the top, there are employee profile cards for Anna, James, Lucy, Chris, and Katie. A pop-up window for James Turner is open, showing his name, level (Stylist), and a message. The main area is a calendar grid for Friday, Feb 26, 2016, with time slots from 9:00 AM to 5:00 PM. Various services and employees are listed in the grid. On the right, there is a 'SHORTCUTS' sidebar with icons for Main, Appointments, Arrivals, Walkin Manager, Point Of Sale, Clients, Performance, and Exit. At the bottom, there are navigation buttons for '< Week', '< Day', 'Today', 'Day >', and 'Week >', along with a 'Menu' button.

EDITING AND DELETING AN EMPLOYEE MESSAGE

- 1 Click on the **main** menu.
- 2 Click on the **appointments** icon.
- A If an employee message is present, a message icon will be displayed next to the employee picture.
- 3 Right click on the relevant employee's picture.
- 4 Select **message**.
- 5 Make the desired changes to the message or backspace the message to delete it.
- 6 Click **done**.

The screenshot displays a scheduling software interface. At the top, there are employee profile cards for Anna, James, Chris, and Katie. Below them is a calendar grid for Friday, 26 Feb, with time slots from 9:00 AM to 5:00 PM. A right-hand sidebar contains a 'SHORTCUTS' menu with options like Main, Appointments, Arrivals, Walkin Manager, Point Of Sale, Clients, Performance, and Exit. An 'Employee Message' dialog box is open in the foreground, showing a message text area with the text 'Peter called and wants you to call him back.' and three buttons: 'Done' (with a green checkmark), 'Cancel' (with a red X), and 'Help' (with a question mark). Numbered callouts 1-6 and A are placed throughout the interface to indicate the steps for editing or deleting a message.



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