

MULTI-SITE

WALK-IN

SPA

HAIR

BARBER

CLINIC

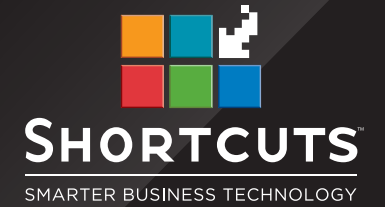
SHORTCUTS FUSION

CLIENT HISTORY

CREATING NOTE TYPES

HOME & MOBILE

BEAUTY



it suits you

Last updated 24 February 2017

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ABOUT THIS DOCUMENT

Note types allow you to organise your client history notes into custom categories to suit your business needs. Each note type you create will have its own tab on the client history screen.

For example, a clinic may want to create different note types for nurse’s notes and doctor’s notes. You can also customise employee access for each note type, ensuring that sensitive history notes are kept secure.

CREATING NOTE TYPES

- 1 Click on the **setup** menu.
- 2 Click on the **configuration** icon.
- 3 Click on the **general setup** menu.
- 4 Scroll down and click on **visit note types**.
- 5 Click **new**.
- 6 Type in the name of the note type.
- 7 Click **done**.

The screenshot shows the 'Visit Note Types Setup' interface. The main window has a red header and a light blue background. On the left is a dark sidebar with icons for Sales, General (3), Stock, Clients, Confirmation, Walkin, Roster, Visual Options, Treatment, Reasons, and Visit Note Types (4). On the right is a 'SHORTCUTS' sidebar with icons for Main, Tools, Stock, Setup (1), Configuration (2), Employees, Employee Groups, Capabilities, Services, Series, and Contraindications. The main content area shows a 'Visit Note Type' dropdown menu with '<Visit Notes>' selected. Below it are checkboxes for 'Active' and 'Display Inactive'. A 'Description' field contains 'General Visit Notes'. A 'Tab Position' dropdown is set to '1'. A note says 'Setup Visit Note Types security in the security configuration screen.' At the bottom are 'New' (5), 'Edit', and 'Save' buttons. A 'Done' button with a green checkmark is at the bottom right. The 'New Visit Note Type' dialog box is overlaid, showing a 'Visit Note Type Name' field with 'Clinic Notes' (6) entered. It has 'Done' (7) and 'Cancel' buttons.

- A
 If you have 2 or more custom note types, you can select the desired tab position from the drop-down menu. The original visit notes will always be in tab position 1.
- 8
Optional: Enter a description.
- 9
 Click **save**.

Sales

General

- Stock
- Clients
- Confirmation
- Walkin
- Roster
- Visual Options
- Treatment
- Reasons
- Visit Note Types

Region

Visit Note Types Setup

Visit Note Type

Clinic Notes ▼

Active Display Inactive

Description

Tab Position

2 ▼

Setup Visit Note Types security in the security configuration screen.

New

Edit

Save

Done

SHORTCUTS

11:08 AM
Tue, 15 Mar '16

- Main
- Tools
- Stock
- Setup
- Configuration
- Employees
- Employee Groups
- Capabilities
- Services
- Series
- Contraindications

Anna Owner
Log Off

SETTING UP NOTE TYPES SECURITY

Before you can start using a new note type, you must set up security for the note type.

- 1 Click on the **setup** menu.
- 2 Click on the **configuration** icon.
- 3 Click on the **general setup** menu.
- 4 Click on the **security** icon.
- 5 Click on the **access** tab.
- 6 Click to select the appropriate security level.
- 7 Double click to expand the visit note types category.
- 8 Double click to expand the security options for the relevant note type.
- 9 Place a tick in the access column for each item that you want this security level to have access to.
- 10 Click **done**.

The screenshot displays the 'Security Setup' window. The 'Access' tab is selected, showing a table of items and their access permissions. The table has columns for 'Item/Action', 'Access', and 'Type'. The 'Access' column contains checkboxes, and the 'Type' column contains 'Action' or 'Item'. The 'Visit Note Types' category is expanded, showing 'Clinic Notes' and several actions related to 'Visit Notes'. A 'Password' section below the table has several checkboxes for security options. A 'Done' button is at the bottom right. A sidebar on the right contains 'SHORTCUTS' and a list of menu items like Main, Tools, Stock, Setup, Configuration, Employees, etc. The user's name 'Anna Owner' and 'Log Off' button are at the bottom right of the sidebar.

Item/Action	Access	Type
Appointment Book	<input type="checkbox"/>	Action
Point Of Sale	<input checked="" type="checkbox"/>	Action
Security	<input checked="" type="checkbox"/>	Action
Walkin Manager	<input checked="" type="checkbox"/>	Action
Roster	<input checked="" type="checkbox"/>	Action
Service	<input checked="" type="checkbox"/>	Action
Visit Note Types	<input checked="" type="checkbox"/>	Item
Clinic Notes	<input checked="" type="checkbox"/>	Item
Create Visit Notes	<input checked="" type="checkbox"/>	Item
Change Historical Visit Notes	<input checked="" type="checkbox"/>	Item
View Other Employee Visit Notes	<input checked="" type="checkbox"/>	Item
Create Historical Visit Notes	<input checked="" type="checkbox"/>	Item
Change Own Visit Notes	<input checked="" type="checkbox"/>	Item
Change Other Employee Visit Notes	<input checked="" type="checkbox"/>	Item
Delete Own Visit Notes	<input checked="" type="checkbox"/>	Item
Delete Other Employee Visit Notes	<input checked="" type="checkbox"/>	Item

Security Setup

Levels | Access

Security Levels

- Owner
- Manager
- Employee
- 2IC

Terminals

- AUSNB067

Item/Action

Access

Type

Double PIN Verification to delete Transactions

Require Return or Done when entering PIN's

Security Enabled

Support Verification Devices

Done

SHORTCUTS

11:29 AM
Tue, 15 Mar '16

Main

Tools

Stock

Setup

Configuration

Employees

Employee Groups

Capabilities

Services

Series

Contraindications

Anna Owner
Log Off



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SMARTER BUSINESS TECHNOLOGY

it suits you

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