

Customer Appointment Manager

User's Guide

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What is Customer Appointment Manager?

Customer Appointment Manager is the fastest, most user-friendly software for managing appointments. It will show you who's available and when, and let you book appointments in seconds. No more putting customers on-hold or having them stand around while you search for an appointment. Everything you'll need to promptly schedule customer appointments is right at your fingertips in this easy-to-use, electronic appointment book.

You'll spend less time scheduling appointments with **Customer Appointment Manager**. Quickly add or locate existing customers, find available appointment times (by employee, time period, or both), and schedule a one-time or repeating appointment, all with just a few clicks of your mouse. Imagine being able to handle your appointments with the same speed and efficiency as the rest of your business.

Customer Appointment Manager's point-and-click navigation and intuitive design make it easy to learn and use, even for first-time computer users. Its user-friendly and visual layout means easy access to all the information and features you'll need to efficiently manage your appointments. If you've been using a paper appointment book, or some other software that's not getting the job done right, you'll be pleased you made the switch to **Customer Appointment Manager**.

With **Customer Appointment Manager** you can:

- Use your QuickBooks Pro/Premier 2003 (or newer version) to import and synchronize customer information
- Access User Account Maintenance to set up users and passwords and assign a security level to the account
- Search for open appointments that meet your waiting list criteria and schedule the appointment from the available list
- Schedule customers in seconds
- View appointments by day, week, or month
- Find open times quickly
- Schedule one-time or repeating appointments
- Fill cancellations and avoid no-shows
- Email customer appointment reminders
- Create personalized letters
- Print mailing labels
- Print daily appointment sheets, appointment reports, and more
- View and print customer appointment history
- Increase staff utilization
- Improve customer service
- Save time

2

Installing Customer Appointment Manager

What You Need to Run Customer Appointment Manager

The minimum software and system configuration you need to run **Customer Appointment Manager** includes:

- A personal computer with a Pentium Processor (75+ MHz) and at least 128 MB of memory.
- One CD-ROM drive and a hard disk, with at least 40 MB of free disk space for program files, plus additional disk space for data files.
- **Customer Appointment Manager** requires Windows 98 or higher.
- A mouse supported by Microsoft Windows 98 and higher is recommended.
- A monitor supported by Microsoft Windows 98 or higher.
- A printer supported by Microsoft Windows 98 or higher.

Installing Customer Appointment Manager

If you purchased a multi-user version of **Customer Appointment Manager**, install the software on each individual workstation. Be sure you are logged in as “Administrator” or have administrative rights to install the application. We also recommend that you close all applications, including screen savers or similar programs, before running the Setup program.

Install Customer Appointment Manager for
Microsoft Windows 98/2000/NT/Me/XP/Vista

Follow the instructions listed below to install **Customer Appointment Manager** using Windows 98 or higher.

1. Insert the **Customer Appointment Manager** CD into your computer’s CD ROM.
2. The Setup program should run automatically. If not, complete the following steps.
 - Click the Start button.
 - Select Run from the Start menu. The Run dialog box is displayed.
 - Type d:\Setup.exe in the dialog box (use the appropriate drive letter for your CD-ROM).
 - Click OK or Press the Enter key.

Note: The Setup program can not run automatically if Autorun is inactive.

Customer Appointment Manager will display the Setup dialog box. Complete the setup by following these steps:

1. Click Next at the Welcome Screen and the License Agreement is displayed. Read it and click Next to accept it.
2. The Installation Options screen appears. Select the Anyone who uses this machine option to allow other users to access the **Customer Appointment**

Manager application on your PC. Or, select the Only for me option if you are the only user that should access the **Customer Appointment Manager** application on your PC. Click Next.

3. The Destination Location window is displayed. The Setup program will install Customer Appointment Manager software to the directory c:\Program Files\Customer Appointment Manager. It will automatically create the directory on your hard disk, if you haven't done so already. To install the program to another directory click Browse and enter or select a destination directory. Click Next.
4. The Start Installation screen is displayed. Click Next, and **Customer Appointment Manager** starts copying the program files to the designated directory and updates the system configuration.
5. The Setup program notifies you that Customer Appointment Manager has been successfully installed. The Setup program automatically adds Customer Appointment Manager to **Start > Programs > ABS Applications** group.
6. Click Finish and the Setup program will add a **Customer Appointment Manager** shortcut to your desktop.
7. Start **Customer Appointment Manager** application by double-clicking the shortcut on the desktop.

Install Multi-User Versions of Customer Appointment Manager for Microsoft Windows 98/2000/NT/Me/XP/Vista

1. Follow the instructions listed on pages 4 and 5 of this chapter to install a multi-user version of **Customer Appointment Manager** using Windows 98 or higher.
2. The Customer Appointment Manager Network wizard is automatically launched when **Customer Appointment Manager** runs for the first time on a workstation. This wizard is used to setup the location of the database, and to share that folder. Click next at the Welcome screen.
3. After a search of the network has been completed, an installation options dialog box will appear. If this is the first time a multi-user version of **Customer Appointment Manager** is installed to a computer on your network, then you will need to select option 1; if not, select option 2.

Continue setup with the option 1 or option 2 procedure.

Option 1:

1. Click Next, after selecting option 1.
2. The database will be installed to the directory, c:\CustAppMGR folder. To install the database to another directory click Browse and select a destination directory. Click Next. To create the directory, click Yes.
3. Click the Share button to share the folder. The CustAppMGR Properties dialog is displayed.

Note: For Windows 98, if the Sharing tab is not available then refer to the section on “Installing Sharing feature in Win 98”.

- **Windows XP Home/Pro (with Simple File Sharing):**
Mark the Share this folder on the network and Allow network users to change my files check boxes, Then, click Apply and OK.

- **Windows XP Pro/ NT / 2000:**
Select the Share this folder option, then select the Maximum allowed option in the User limit field. Click Apply. Next, click the Security tab and select Users or Everyone, and give full control by marking the Full Control check box.
 - **Windows 98:**
Select the Shared As option, select the Full Access Typel, click Apply and Click OK.
4. Click Next.
 5. Click Finish. **Customer Appointment Manager** is automatically launched.

Option 2:

1. Click Next, after selecting option 2.
2. Select the Customer Appointment Manager database folder from the list or by clicking Browse.
3. Click Next.
4. Click Finish.

Installing Sharing Feature for Win 98

If the Sharing tab is not available, follow this procedure to install.

1. Click on Start > Settings > Control Panel > Network.
2. Click on “File and Print Sharing”.
3. Mark the I want to be able to give others access to my files check box, and click OK.
4. Insert Windows operating system (98) CD, and click “OK” and follow the instructions. (Restart the computer after this step is finished.)
5. Insert Windows operating system (98) CD, and click “OK” and follow the instructions. (Restart the computer after this step is finished.)

Getting Started

With its user-friendly design and point-and-click navigation, **Customer Appointment Manager** is easy to learn and set up, even for first-time computer users. After installing **Customer Appointment Manager**, review this chapter to learn about using the:

- Menu Bar
- Tool Bar
- Appointment Book
- Calendar
- Appointment Detail
- Waiting List
- Database Maintenance
- and other features

When you're ready to start scheduling appointments, you'll be up and running after completing a brief setup.

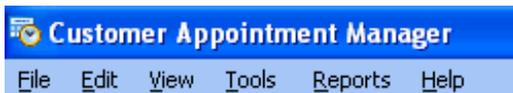
Using Menus & Tools

After you've installed **Customer Appointment Manager**, review the menus and tools so you become familiar with the program's features. The pages in this chapter provide you brief descriptions to help you learn the locations of the features you'll use to make appointment scheduling quick and easy.

Menu Bar

In **Customer Appointment Manager**, access options in your menu bar by:

- clicking on the menu name using your mouse
- pressing the Alt key plus the underlined letter of the menu name using your keyboard



File menu:

Use this menu for maintaining information records, importing employees and customers from QuickBooks, deleting old appointments, adding and maintaining custom fields, importing and exporting customer data from other files, backing up and restoring **Customer Appointment Manager**, printing appointment calendars, and exiting the program.

Edit menu:

Use this menu for cutting, copying, pasting, editing, and deleting appointments, as well as moving appointments to the Waiting List.

View menu:

Use this menu for selecting day, week, or month calendar views, finding open times, searching for appointments, zooming the view size, and refreshing the calendar (multi-user versions only).

Tools menu:

Use this menu for setting your appointment calendar options, generating customer email lists and appointment reminders, creating and printing mailing labels, emailing appointment information to employees, and creating or editing letters.

Reports menu:

Use this menu for viewing and printing the Daily Appointment Sheet, Appointments by Employee, Appointments by Customer, Employee Productivity, Services Summary, Waiting List, and Customer List.

Help menu:

Use this menu for learning how to use **Customer Appointment Manager**, getting online updates, finding special offers, and sending feedback.

Note: The Alt Key shortcuts using your keyboard can also be used with each command in your menus. For example, Alt R opens your Reports menu, and when it's followed by Alt P, then Alt D, it will print your Daily Appointment Sheet.

Tool Bar

To access options in your tool bar, click on the button using your mouse.



Employee Maintenance button:

adding, editing, and deleting employee records.

Customers Maintenance button:

adding, editing, and deleting customer records.

Find Open Time button:

finding an available appointment time.

Search for Appointment button:

searching the calendar for specific information such as customers' names, employees' names, or scheduled appointments.

Waiting List button:

printing, adding, editing, and deleting customer waiting list information.

Toay button:

viewing today's appointment calendar with each employee column.

Day button:

viewing a specific day in the appointment calendar with each employee column.

Week button:

viewing an employee's appointments in week-format.

Month button:

viewing a summary of appointments booked versus hours available in a month-format.

Back button:

going back to a previous date, week, or month.

Forward button:

moving ahead to the next date, week, or month.

Filter button:

condense the employee list that appears on the scheduling worksheet by filtering out the non-applicable description(s).

Refresh button (*multi-user versions only*):

updating the appointment calendar when multiple people can make entries.

Appointment Book

The **Customer Appointment Manager** appointment book is located in the center of your screen and has the appearance of a typical paper appointment book. You can customize the look of your book by selecting the fonts and colors you prefer.

	Gregg O Schneider	Jill P Anderson	Sue T Arnold
10 am		Sampson, Gina B, Mom 111-555-1098, Children's Cut	
10:15			
10:30			
10:45			
11 am			Randall, Samantha R, 111-555-4642, Shampoo, Cut, & Style
11:15			
11:30		Norton, Melonie J, 111-555-4163, Cut & Highlight	
11:45			
12 pm	Buchanan, Jackson R, 111-555-3974, Shampoo & cut		Mickelsen, Jamie P, 111-555-7514, Cut only
12:15			
12:30			
12:45			
1 pm	Abbott, Marilyn T, Shampoo, Cut, & Style		Carter, Jessica B, 111-555-9657, Cut & Highlight
1:15			
1:30		Birch, Norton T, 111-555-2208, Cut only	
1:45			
2 pm		Ogden, Mandy E, 111-555-3411, Shampoo & cut	
2:15			
2:30			
2:45			
3 pm			
3:15			

You can also use the appointment book to schedule upcoming customer appointments, employee days off or duties such as cleaning and stocking shelves.

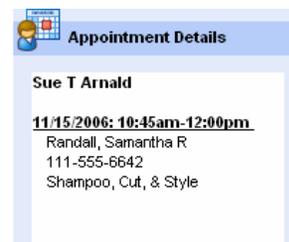
Calendar

The calendar in **Customer Appointment Manager** makes it easy to select the date or dates you are viewing in your appointment book. By simply clicking on a date in your calendar, the appointment book view changes to that date. You can also use the arrows at the top of the box to scroll to the month or date you need to find.



Appointment Details

The appointment details box is located on the left side of your screen. When you select an appointment in your appointment book, this box will give you the complete details of that appointment. At the top of the box, **Customer Appointment Manager** notes the date and time of the visit. Next, it lists the customer's name and phone number, the service requested, and any additional information needed for the appointment such as a customer's special needs, allergies, preferences, and so on.



Waiting List

The waiting list box, in the lower left corner of your screen, displays the status of your waiting list items. Clicking the All link allows you to view all customers waiting in the Waiting List window, where you can add, edit, even schedule your waiting list appointments.



The waiting list in **Customer Appointment Manager** can be sorted by clicking the column headings or by clicking the Sort button.

Database Maintenance

You can backup and restore your customer and appointment data, set data paths to other databases, and remove old appointments with these maintenance features.

Backup:

Select Backup from the File menu to backup your data frequently. You should keep a backup copy of the **Customer Appointment Manager** database in case the files become unusable due to an unforeseen computer problem. You can use the Backup Reminder feature to alert yourself to backup.

Restore:

Select Restore from the File menu to overwrite your current database with the database from your last backup. **For multi-user versions only:** Before backing up or restoring your database, please be sure you are the only user logged into **Customer Appointment Manager** and all other users are logged out.

Set Data Path:

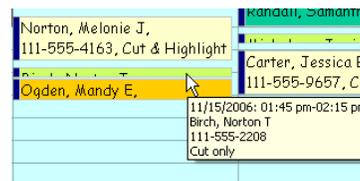
Using Set Data Path allows you to refer to databases other than your default Microsoft® Access® database file (C:\Program Files\Customer Appointment Manager\ApptDB.mdb). Select Set Data Path from the File menu.

Delete Old Appointments:

Select Delete Old Appointments from the File menu. Enter or select a date, and appointments that occurred before that date will be removed from your **Customer Appointment Manager** database. If you delete old appointments with this procedure, the appointments cannot be restored.

More Features

Customer Appointment Manager uses pop-ups to show you details as you browse the appointment book. When space is tight, pass your cursor over an appointment to see its details.



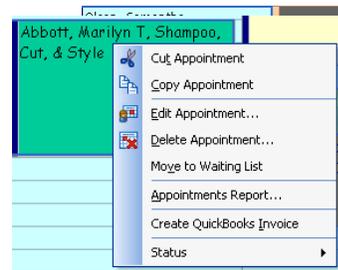
To move appointments, you can place the cursor on the top bar of the appointment box, then drag-and-drop it to a new time slot or new employee slot.

Quickly scroll the appointment calendar using your mouse wheel.

From the View menu, select Zoom to choose the view size of your appointment book.

From the File menu, select Print to print the daily, weekly, or monthly calendar view of your appointment book.

Right-click appointments, list fields, or hours tables for quick access to options such as cut, copy, paste, and delete. Also right-click appointments to view or print the Appointments Report, create QuickBooks invoices and view the status of the appointment.



Steps to Setting Up

When you're familiar with the menus, tools, and features, you're ready to start using **Customer Appointment Manager**. Getting started is simple! Follow these easy steps to start scheduling appointments:

1. Set up your business operations information
2. Add your employees & add services your business offers
3. Add your customers
4. Begin scheduling appointments

Getting Help

If you have any questions about **Customer Appointment Manager**, please refer to the Help Topics within the Help File, the chapters within this user's guide, or contact our Technical Support department by e-mail at **support@asiAbility.com** during UK office hours of 9:00 am to 5:30 pm.

4

Setting Up Your Options

The first step to setting up **Customer Appointment Manager** is selecting your Company Options and User Options. In this step, you will customize **Customer Appointment Manager** to meet your business's specific needs. You also have the flexibility to update your settings at any time.

Company Options are general information that includes scheduling time intervals, week days to display, user accounts and passwords, and holidays closed. From the Tools menu, select Company Options to set up information in three tabs:

- General tab
- Backup tab
- Holidays/Days Closed tab

User Options are used to set up user workstation features, such as employee list order, calendar colors, and time formats. From the Tools menu, select User Options to set up information in two tabs:

- General tab
- Appointments tab

You can further customize **Customer Appointment Manager** by setting up user-defined fields in the Custom Fields window.

Selecting or Editing Company Options

Before you begin scheduling appointments, you will want to set up your appointment book week view, security passwords (if needed), time formats, and so on for **Customer Appointment Manager**. This information can also be edited at any time using the same procedures.

General Tab

Tools > Company Options > select General tab

The Company General tab is used to set up scheduling time intervals, week days to display, and user accounts.

In multi-user versions, Company Options will only display in the Tools menu for program administrators. Also, the options selected by the administrator will apply to each workstation. Individual users cannot change Company Options for their personal workstations.

Appointment Time Intervals

Choose to have your appointment book display time intervals every 10 minutes, 15 minutes, 30 minutes, or every hour. For multi-user versions only, select a refresh time interval.

First Day of Week

Select the day that each week of your appointment book begins.

Days to Show in Week View

Here, mark the check boxes to select each day of the week you want displayed in the week view of your appointment book.

User Account Maintenance

Use the User Account Maintenance button to set up users and passwords. Click

the Add User button and the User Account Properties window is displayed. Enter the User ID, enter a Password, and enter the password again to confirm it.

Also select the type of security control for the account.

- Administrator type ensures full control.
- Standard type allows read-write access.
- Limited type allows read-only access.

To make changes to an account, select the user name and click the Properties button. Selecting the user name and clicking the Remove User button will remove their name.

Backup Tab

Tools > Company Options > select Backup tab

Use the Backup tab to set a reminder that will alert you when it is time to backup your appointment book.

Backup Reminder

Mark the check box to activate reminder alerts and enter a number for how many days you wish to have between receiving the alerts.

After installing Customer Appointment Manager, the default reminder setting is active for an alert every day.

Holidays/Days Closed Tab

Tools > Company Options > select Holidays/Days Closed tab

Use the Holidays/Days Closed tab to indicate holidays and other days the company will not be open for scheduling appointments, such as Labor Day or Thanksgiving. Identifying the dates in this tab sets up messages that will alert you when you choose an unavailable date.

Holidays/Days Closed

Mark the check box for each holiday your company will not be available for appointments.

Customize the list by clicking the Add, Edit, and Remove buttons to include company days off not listed, or to change or delete other holidays displayed in the list.

Holidays automatically set to appear in this list are determined by the user's operating system settings, such as United States or Ireland.

Selecting or Editing User Options

Set up user workstation features, such as employee list order, calendar colors, and time formats using the General tab and Appointments tab.

General Tab

Tools > User Options > select General tab

Use the General tab to select how information is displayed in your calendar, such as time formats, employee order, and colors. You can also set your password and warnings for double bookings.

Calendar Time Formats

Your time can be displayed in one of two formats: 24-hour or AM/PM time.

Employee Sort Order

Choose to sort your employees by name or by position in your appointment book.

Background Color

Use the default background color, or select your own, for the background of your appointment book.

Show Minutes on Time Ruler

Mark the check box to include minutes on the time ruler of your calendar view.

Refresh

(multi-user versions only)

Choose how frequently you want your appointment book to be automatically updated.

Warn on Double Bookings

Mark the check box to set up alerts that notify you of double bookings.

Change Passwords

Change and verify your user password.

Appointments Tab

Tools > User Options > select Appointments tab

Use the Appointments tab to select the font styles and sizes of your appointment book and reports. Here, you'll also set up the customer information you want to list in the daily and weekly views, which is also displayed in Appointment Details.

Fonts

Choose the font style and font size for your appointment book views:

- Day/Week
- Month

View Options

Choose the customer information you want to appear in your appointment book for the daily and weekly views. Your options include custom fields you define and:

- Customer Name
- Customer Company Name
- Customer Phone
- Appointment Services
- Appointment Description
- Customer Alternate Phone
- Customer Address
- Customer Email Address
- Customer Note
- Appointment Status: Scheduled, Confirmed, Canceled, and No-Show

Adding Custom Fields

File > Custom Fields > select Add

Use the Custom Fields window to add your own fields to customer and appointment forms. You can add up to five fields to the customer form and up to five fields to the appointment form.

Forms

Choose to add a custom field to a form:

- Customer
- Appointment

Caption/Name

Enter the caption or name for your custom field.

Data Type

Choose the type of data you will enter in the custom field:

- Text
- Selection List
If you chose to add a custom selection list, you need to type into the List field each item you want to appear in your custom selection list.
- Number

Length

Enter the character length allowed for the data entered in the custom field.
Use the Custom Fields window to edit or delete custom fields you added to your customer and appointment forms.

Editing or Deleting Custom Fields

1. Click the File menu and select Custom Fields.
2. Select the custom field you wish to edit or delete.
3. Click Edit to open the Edit Custom Fields window and make your changes.
Click OK to save.
4. Click Delete to remove the custom field.

5

Adding Employees & Services

After setting up your business information, you will add your employees and the services offered by your business. Enter each employee that takes appointments and their individual work schedules. Procedures in this chapter describe how to:

- Add a New Employee
- Edit or Delete Employees
- Schedule Employee Time Off
- Add a New Service
- Edit or Delete Services

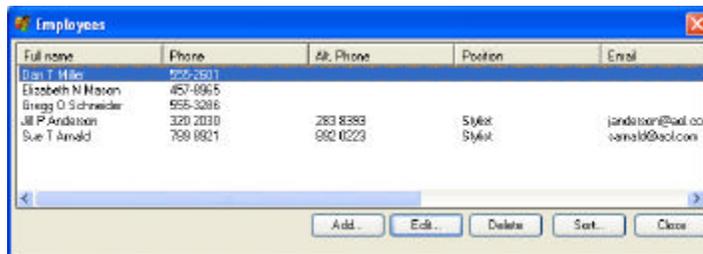
Adding Employees

During the initial setup of **Customer Appointment Manager**, you'll add each employee to your appointment book by following the procedure below. After setup, you can add a new employee at any time using:

- Employee Maintenance in the File menu
- Employee Maintenance button in the tool bar

Add a New Employee

1. From the File menu, select Employee Maintenance. Or, click the Employee Maintenance button in the tool bar.



2. Click Add.
3. In the Information tab, click the First Name field and enter the employee's First Name. Continue entering their Middle Initial and Last Name.
4. Mark the Hide Name on Schedule check box if the employee does not take appointments and does not need a column in the appointment book.
5. Add the employee's position by clicking the Add button next to the position field, and typing the position title or description.

Or, select the employee's position from the drop-down list.

Note: Each position you add is automatically placed in the drop-down list.

6. Complete the Information tab by entering:
 - Name on Schedule
 - Phone and Alternate Phone
 - Email Address
7. Click the Work Schedule tab and enter the employee's work hours. Right-click in the hours table for the cut, copy, paste, and delete functions.

Note: To indicate a day the employee is unavailable (for example, every Friday off), simply leave the start and end fields blank for that day.

Editing & Deleting Employees

Edit Employees

1. From the File menu, select Employee Maintenance. Or, click the Employee Maintenance button in the tool bar.
2. From the list of employees, select the employee you're making changes for.
3. Click Edit.
4. Make changes to the Information and/or Work Schedule tabs.
5. Click OK.
6. Click Close.

Delete Employees

1. Click the File menu and select Employee Maintenance.
Or, click the Employee Maintenance button in the tool bar.
2. From the list of employees, select the employee you're deleting.
3. Click Delete.

4. Click Yes to delete the employee and move all the employee's appointments to the waiting list.

Note: After the appointments are moved to the waiting list, you can re-schedule or cancel each as needed.

5. Click Close.

Scheduling Time Off

Schedule Employee Time Off

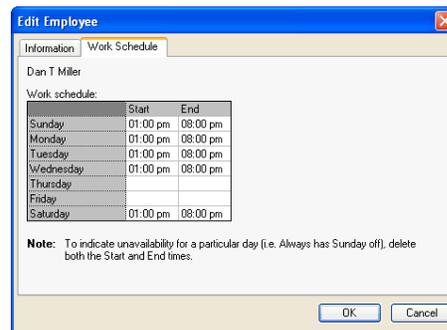
Customer Appointment Manager handles employee time off for two situations. First, regularly scheduled days off. For example, an employee may work every day except Wednesdays. Second, time off employees take for vacations, medical appointments, and so on. Time off can be scheduled in two locations:

- Work Schedule tab
- Appointments scheduling window

Using the Work Schedule tab:

Use this option when planning for regularly scheduled days off. For example, if an employee has every Monday off.

1. From the File menu, select Employee Maintenance. Or, click the Employee Maintenance button in the tool bar.
2. From the list of employees, select the employee you're scheduling for days off.
3. Click Edit.
4. Click the Work Schedule tab.

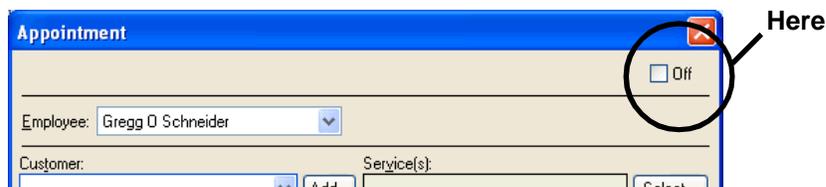


5. In the table of hours, leave the start and end fields blank to indicate the day(s) off.
6. Click OK.
7. Click Close.

Using the Appointments Scheduling Window:

Use this option when planning for time off outside the employee's regular schedule. For example, noting a day of vacation time or a two-hour break for a medical appointment.

1. Locate the day and time in the appropriate employee column of the Appointment Book using the Calendar box or navigation buttons in the tool bar.
2. Double-click in the starting field of the time off to launch the Appointments scheduling window.
3. Mark the Off check box to indicate you are scheduling time off for the employee.



4. Review the Employee, Start time, and Date fields. Edit, if necessary.
5. Enter the End time or click the All Day check box.
6. Click the Repeat appointment button and select the dates to schedule time off, if appropriate.
7. Mark the Reminder check box and set a reminder, if needed.
8. Select the color of the text for the appointment book.

9. Enter a description for the scheduled time off.
For example: “Allison has a dental appointment.”
10. Click OK.

Note: To indicate dates or holidays your business is closed and employee appointments are not available, use the Holidays/Days Closed tab in Company Options.

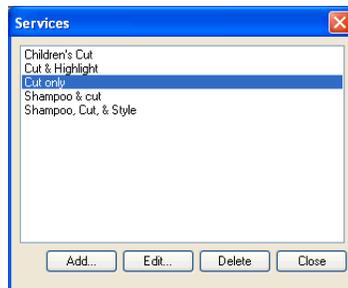
Adding Services

For your initial set up of **Customer Appointment Manager**, you'll prepare your appointment book by adding each service your business offers. After setup, you can add new services at any time using:

- Appointments scheduling window
- Service Maintenance in the File menu

Add a New Service

1. From the File menu, select Service Maintenance.
2. Click Add.



3. Enter the service title or description.
4. Select text and background colors to easily identify the service in your calendar.

5. Select the duration of the service.
6. Click OK.
7. Click Add and repeat these steps until your list of services is complete.
8. Click Close.

Editing & Deleting Services

Edit a Service

1. From the File menu, select Service Maintenance.
2. From the list of services, select the service you're editing.
3. Click Edit.
4. Make changes to the service title or description, colors, or service duration.
5. Click OK.
6. Click Close.

Delete a Service

1. Click the File menu and select Service Maintenance.
2. From the list of services, select the service you're deleting.
3. Click Delete.
4. Click Yes to delete the service.
5. Click Close.

Note: You will need to re-schedule or cancel appointments for the discontinued service, as needed. You can find the appointments you need to change using the Search for Appointment feature described in Chapter 7: Scheduling Appointments.



Adding Customers

If you have an established business with existing customers, you'll add them after entering your employees and services. Procedures in this chapter describe how to:

- Add a New Customer
- Edit or Delete Customer Information

Adding Customers

During the initial setup, you'll add each of your existing customers to your appointment book by following the procedure below. After setup, you can add a new customer at any time using:

- Customer Maintenance in the File menu
- Customer Maintenance button in the tool bar
- Appointment scheduling window

Add a New Customer

1. From the File menu, select Customer Maintenance. Or, click the Customer Maintenance button in the tool bar.



2. Click Add Customers.
3. Enter the customer's information including:
First Name, M.I.,
Last Name, Company, Phone,
Alternate Phone, Email
Address, and/or Address.
4. Click OK.
5. Click Close.

Editing & Deleting Customers

Edit Customers

1. From the File menu, select Customer Maintenance. Or, click the Customer Maintenance button in the tool bar.
2. From the list of customers, select the one you're editing.

Note: For more help locating the customer, click the Search button. This feature can sort the customer list by Name or by Phone Number. Or, begin typing the name or number you need in the text field. **Customer Appointment Manager** will search the list for you and locate the customer.

3. Click Edit.
4. Make changes to the customer's information.
5. Click OK.
6. Click Close.

Delete Customers

1. From the File menu, select Customer Maintenance. Or, click the Customers button in the tool bar.
2. From the list of customers, select the one you're deleting.

Note: For more help locating the customer, click the Search button.

3. Click Delete.
4. Click Yes to delete the customer and all related appointments.
5. Click Close.

Importing & Exporting

If you have an established business, you may already have a database or file that's storing your employee, services, and customer information. With **Customer Appointment Manager**, you can import this information to take care of set up quickly and easily. Additionally, you can keep your **Customer Appointment Manager** information up to date by importing to share changes in your QuickBooks company file at any time, or by setting up a synchronization. Procedures in this chapter describe how to:

- Set QuickBooks Connections Options
- Import Employees using QuickBooks
- Import Services using QuickBooks
- Import Customers using QuickBooks
- Import Customers from a Text File
- Export Customer Data

Importing Information

Customer Appointment Manager allows you to import from other files during set up. Plus, you can use importing to update **Customer Appointment Manager** at any time. The information you can import includes:

- Employees
- Services
- Customers

Set QuickBooks Connections Options

Users of QuickBooks Pro/Premier 2003 or Enterprise 2.0 (or newer versions) can import employee, customer, and services data from a QuickBooks company file, as well as use the data to prepare invoices in **Customer Appointment Manager**.

To do so, the connection to the company file must be set up with QuickBooks.

To set QuickBooks connections:

1. Open your QuickBooks company file, and return to **Customer Appointment Manager**.
2. From the File menu, select Import from QuickBooks > Set QuickBooks Connections Options.
3. Mark the check box to set up automatic synchronization with the company file displayed.

Note: Using automatic synchronization also updates your QuickBooks company file with any services or customers you have added in **Customer Appointment Manager**.

4. Select the billing address or the shipping address to be used for synchronization.
5. Click Close.

Import Employees from QuickBooks

Users of QuickBooks Pro/Premier 2003 or Enterprise 2.0 (or newer versions) can import employees from a QuickBooks company file.

To import from QuickBooks:

1. Open your QuickBooks company file, and return to **Customer Appointment Manager**.

Note: You must have an open company file to complete an import.

2. Click Yes in the Import Employees from QuickBooks dialog box to begin.
An Import Complete message indicates the task is finished. It displays the number of employees added and the number of employees updated in **Customer Appointment Manager**.

3. Click OK.

Note: You can update your database at any time with the import feature.

Import Services from QuickBooks

Users of QuickBooks Pro/Premier 2003 or Enterprise 2.0 (or newer versions) can import services from a QuickBooks company file.

To import from QuickBooks:

1. Open your QuickBooks company file, and return to **Customer Appointment Manager**.

Note: You must have an open company file to complete an import.

2. Click Yes in the Import Items/Services from QuickBooks dialog box to begin.
An Import Complete message indicates the task is finished.

3. Click OK.

Note: You can update your database at any time with the import feature.

Import Customers from QuickBooks

Users of QuickBooks Pro/Premier 2003 or Enterprise 2.0 (or newer versions) can import customers from a QuickBooks company file.

To import from QuickBooks:

1. Open your QuickBooks company file, and return to **Customer Appointment Manager**.

Note: You must have an open company file to complete an import.

2. Click Yes in the Import Customers from QuickBooks dialog box to begin.
An Import Complete message indicates the task is finished.
3. Mark the Import billing address option or the Import shipping address option and click Yes.
4. Click OK.

Note: You can update your database at any time with the import feature.

Import Customers from a Text File

Use this import feature to enter your customer information using .txt files.

To import from a text file:

1. From the File menu, select Import Customers from a Text File.
2. Locate the file you want to use for the import and click Open.
3. Make your customer import selections and click Next.

4. Select destination fields for the each column of data using the drop-down lists, such as First Name, Last Name, and Phone.
5. Click Finish.

Exporting Information

Customer Appointment Manager allows you to export your customer information to .txt files. You may find this feature valuable for other database activities in your company, such as invoicing.

To export to a text file:

1. From the File menu, select Export Customer Data.
2. Locate or enter the file name you want to use for the export.
3. Click Export Customers.
4. Click OK.

8

Scheduling Appointments

Before scheduling appointments, you'll want to have your **Customer Appointment Manager** set up complete. Be sure you entered company and user options, employees, services, and any existing customers your business may already have before continuing with the scheduling procedures in this chapter.

- Scheduling Appointments
- Repeating Appointments
- Using Reminders
- Editing Appointments
- Deleting Appointments

Customer Appointment Manager is so easy to learn and use, it won't take long for your customers to benefit from quicker appointment bookings and newly improved customer service you provide.

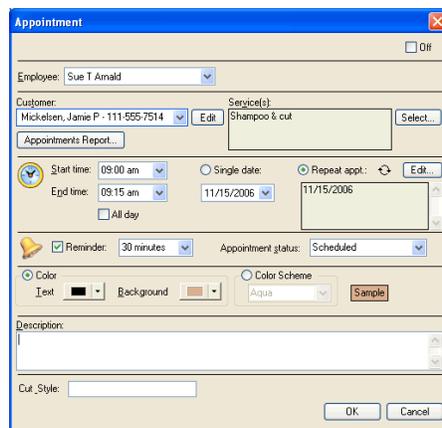
Scheduling Appointments

Customer Appointment Manager has an Appointment scheduling window for booking appointments. There are three locations you can use to launch the window:

- Appointment Book
- Find Open Time
- Waiting List

Appointment Book

1. Locate the appointment date and time in the appropriate employee column using the Calendar box, or the navigation buttons in the tool bar.
2. Double-click the start time field of the appointment or right-click and select Add Appointment to display the Appointment scheduling window.



3. Enter the customer by selecting from the drop-down list, or begin typing the name to display possible choices with that letter combination. For a new customer, click Add to display the Add Customer window.
4. To enter the service the customer will receive, click Select. In the Select Service window, mark one or several check boxes to enter services and click OK. For a

new service, click Select. In the Select Service window, click Edit Services, and click Add to add the new service.

5. Employee, Start Time, and Date fields are populated based on your selection in the appointment book. You can make changes, if needed, at this time.
6. Select the End Time of the appointment. Or, mark the All Day check box if the appointment will occupy the employee's entire workday.
7. If this is a recurring appointment, click the Repeat appointment button and identify the date(s) if the appointment, as needed.
8. Set a reminder, if needed.
9. Select an Appointment Status: Scheduled, Confirmed, Canceled, or No Show.
10. Choose the color of the appointment text and background, or select one of the color schemes.
11. Enter a description for additional information about the appointment, if needed.
12. Click OK.

Find Open Time

There are two options for finding available appointment times:

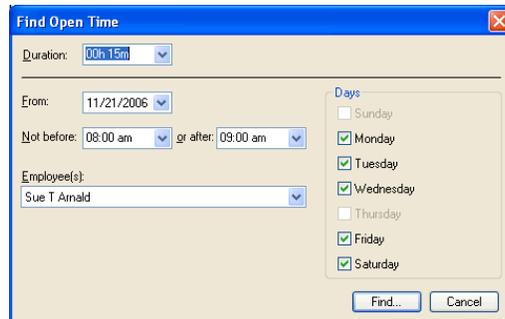
- Appointment Book Calendar
- Find Open Time button

Using the Appointment Book Calendar:

1. Select a date, week, or month in the Calendar box.
2. Use the Daily or Weekly buttons, or the Forward and Backward buttons, in the tool bar to locate the opening(s).

Using Find Open Time:

1. Click the Find Time button. Or, from the View menu, select Find Open Time.



2. Enter the appointment information you're searching:
 - Duration of appointment
 - Not Before time
 - Or After time
 - Employee(s)
 - Day(s) of the week

Note: Days of the week where the employee is available are highlighted.

3. Click Find.
4. View the list of available appointments.
5. Select Back to edit your search information and find other available appointments. Or, click an available time and select Schedule to open the Appointments scheduling window.
6. Click Close to exit Find Open Time.

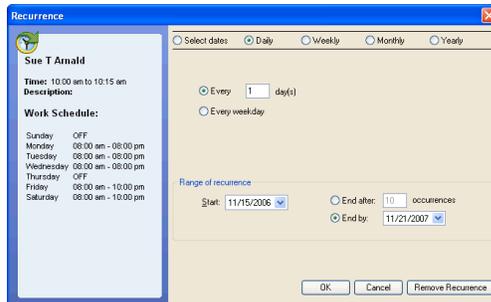
Repeating Appointments

Customer Appointment Manager gives you the ability to schedule repeating appointments for your customers. There are two ways to set up a repeating appointment. When you are:

- scheduling a new appointment
- editing an existing appointment

Schedule Repeating Appointments

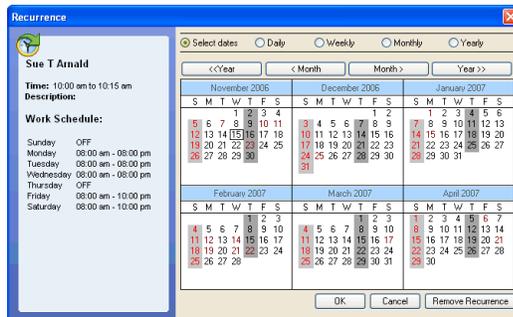
1. Open the Appointment scheduling window by double-clicking a start time, or by right-clicking and selecting Add Appointment.
2. Review appointment details. Edit, if necessary.
3. Select Repeat appointment and click the Edit button.



4. Click the Select Dates button, or choose a repeating pattern: Daily, Weekly, Monthly, or Yearly.

Note: Repeating patterns can be defined further, such as every third of the month. You will see the options after selecting the pattern type.

- To select each date individually for the next appointments, click within the calendar boxes. **Tip:** To quickly select repeating days (i.e. every Wednesday in a month), simply click on the first letter of that day (i.e. the “W” in Wednesday).



Note: On each calendar, dark gray boxes indicate the days the selected employee is unavailable, and red dates indicate Sundays or holidays.

- Click OK when all dates have been selected.
- Return to the Appointment scheduling window to edit, if necessary.
- Click OK to begin saving the repeating appointment to your calendar.

Place repeat appointments in the appointment book:

- After completing the steps above, **Customer Appointment Manager** begins searching your appointment book for any appointments that conflict with the repeats you’ve selected.
- When a conflict is found, **Customer Appointment Manager** will display the Repeating Appointment Conflicts dialog box.

The list displays the date, time, and reason for the conflict, such as when an existing appointment is already in your appointment book.

3. Select the conflict, then the action you want to take:
 - Reschedule opens appointment scheduling options.
 - Do not schedule skips that appointment.
 - Schedule anyway adds the appointment to your appointment book.
 - View conflicts opens the Conflicting Appointments window to display the details of the other appointment.
 - Cancel stops the scheduling attempt without affecting your appointment book.
4. Click Done to place the repeat appointments in your appointment book.

Using Reminders

With **Customer Appointment Manager**, you can set reminders to alert you to upcoming appointments, upcoming employee time off, and repeating appointments. There are two ways to set a reminder. When you are:

- scheduling a new appointment or time off
- editing an existing appointment or time off

Set Reminder

1. Open the Appointment scheduling window for setting up a new appointment/time off or editing an existing appointment/time off.
2. Review the details and edit, if necessary.
3. Mark the Reminder check box.
4. Select when you want the reminder to appear from the drop-down list. You can select from a few minutes or hours before the appointment/time off, or up to several days before the appointment/time off.
5. Click OK.

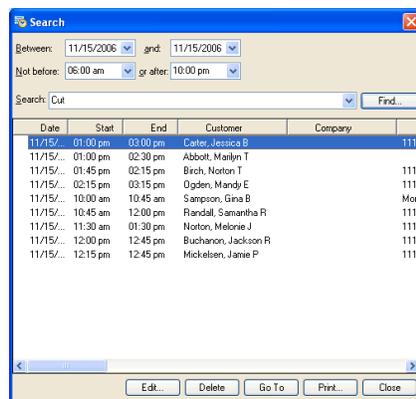
Editing Appointments

There are two locations to find and edit appointments:

- Search for Appointment
- Appointment Book

Edit with Search for Appointment

1. From the View menu, select Search for Appointment. Or, click the Search button in the tool bar.



2. In the Search for Appointment window, enter the date(s), time(s), and/or search description, and click the Find button.
3. To display the Appointment scheduling window, select the appointment in the list generated from your search, and click Edit. Or, double-click the appointment in the list.

Note: If you are editing a repeating appointment, the Open Repeating Appointment window asks you to select: Open only the appointment or Open the series.

4. Edit the appointment information as needed.
5. Click OK.
6. Click Close.

Edit with the Appointment Book

1. Locate the appointment in the Appointment Book and launch the Appointment scheduling window by double-clicking the appointment. Or, select the appointment in the appointment book and click Edit menu, Edit Appointment.
2. Edit the appointment information as needed.
3. Click OK.

Deleting Appointments

There are two locations to find and delete appointments:

- Search for Appointment
- Appointment Book

Delete with Search for Appointment

1. From the View menu, select Search for Appointment. Or, click the Search for Appointment button in the tool bar.
2. In the Search for Appointment window, enter the date(s), time(s), and/or search description
3. Click the Find button.
4. Select the appointment in the list generated from your search, and click Delete.

Note: If you are deleting a repeating appointment, the Open Repeating Appointment window asks you to select: Delete only the appointment or Delete the series.

5. Click Yes.
6. Click Close.

Delete with the Appointment Book

1. Locate the appointment in the Appointment Book.
2. Select the appointment and click Edit menu, Delete Appointment.
3. Click Yes.

9

Using the Waiting List

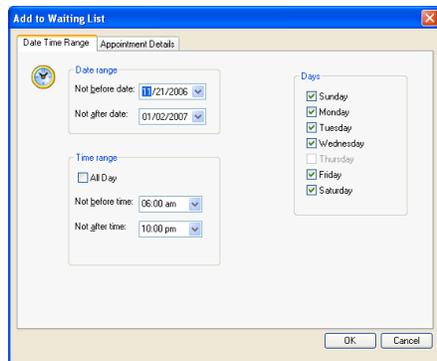
Use the **Customer Appointment Manager** waiting list to keep track of customers waiting for specific dates, times, and/or employees to become available. You can add customers to the waiting list at any time. If their desired appointment becomes available, you can place their appointment into the book directly from the waiting list. Procedures in this chapter describe how to:

- Add to Waiting List
- Schedule from Waiting List
- View & Print Waiting List
- Edit or Delete Waiting List

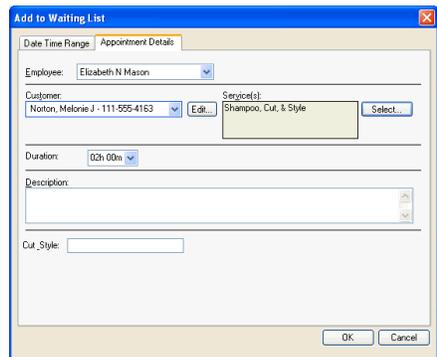
Using the Waiting List

Add to Waiting List

1. Click the Waiting List button in the tool bar to display the Waiting List window.
2. Click Add to display the Add to Waiting List window.



3. In the Date Time Range tab, enter or select the date range, time range, and days that may work for the customer.
4. In the Appointment Details tab, enter or select the Employee, Customer, and Service information for the appointment.



5. Click OK.
6. Click Close.

Schedule from Waiting List

In **Customer Appointment Manager**, you can schedule appointments from the Waiting List in three ways:

- Waiting List on screen
 - Waiting List button in the tool bar
 - File > Waiting List Maintenance
1. Locate the appointment in the Waiting List on screen. Or, locate the appointment using the Waiting List button in the tool bar.
 2. Double-click the appointment to open the Appointment scheduling window.
 3. Enter appointment details, if needed.
 4. Click Schedule.

View & Print Waiting List

There are three locations in **Customer Appointment Manager** for viewing your Waiting List:

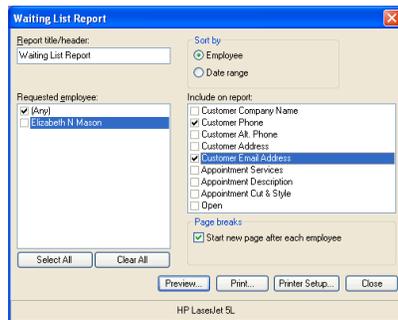
- On screen Waiting List is readily accessible and always in view in the lower left corner
- Waiting List button in the tool bar brings up your list and options
- File menu opens Waiting List Maintenance
- Reports menu opens your Waiting List Report and options

Previewing and printing your Waiting List information can be done from the:

- Waiting List button
- Waiting List Report

To preview and/or print Waiting List information:

1. Click the Reports menu and select Waiting List Report. Or, click the Waiting List button in the tool bar and select Print.



2. Enter a Report Title/Header, or use the default title.
3. Select a Sort option: sort by Employee or Date Range.
4. Select the employees for your report by marking the appropriate check box(es). Or, use the Select All or Clear All buttons.
5. Mark the appropriate check boxes to indicate the customer information you want in the report. The list includes all customer fields, all appointment fields, and any custom fields you defined.

Examples are Customer Phone, Customer Alt Phone, Customer Address, and Customer Email Address.

6. Mark the Start new page after each employee check box, if desired.
7. Click Printer Setup to enter your printer settings:

Paper: size and source
Orientation: portrait or landscape
Margins: top, bottom, left and right

8. Click Print.
Or, click Preview to view before printing, and then click Print to print your report.

Edit or Delete Waiting List

You can edit or delete waiting list appointments at any time in **Customer Appointment Manager**.

To edit a Waiting List appointment:

1. Click the Waiting List button in the tool bar and locate the appointment to edit.
2. Select the appointment
3. Click Edit.
4. Edit the appointment information in the Appointments scheduling window.
5. Click OK.
6. Click Close.

To delete a Waiting List appointment:

1. Click the Waiting List button in the tool bar and locate the appointment to edit.
2. Click Delete from Waiting List.

Or, delete the appointment by:

1. Click the Waiting List button in the tool bar and locate the appointment to delete.
2. Select the appointment.
3. Click Delete.
4. Click Yes.

10

Creating Reports

Customer Appointment Manager creates seven reports: Daily Appointment Sheet, Appointments by Employee, Appointments by Customer, Employee Productivity, Services Summary, Waiting List, Customer List. The reports can be printed and distributed to your employees, or stored in their customer records. For example, you can use Daily Appointment Sheets as a hand-out to each employee when they arrive for work, giving them a schedule of the appointments to expect during their shift. Procedures in this chapter describe how to:

- View Reports
- Print Reports

Viewing & Printing Reports

View Reports

1. Click Reports menu, and select the report:
 - Daily Appointment Sheet
 - Appointments by Employee
 - Appointments by Customer
 - Employee Productivity
 - Services Summary
 - Waiting List
 - Customer List
2. Enter a Report Title/Header, or use the default title.
3. Mark the check box to print in color, if desired.
4. Select the employees or customers for your report by marking the appropriate check box(es). Or, use the Select All or Clear All buttons.
5. Enter the Date Range for your report with a Start and End date.
6. Make the appropriate selections to indicate the information you want in the report, such as name, phone number, or email address.
7. Set your Page Breaks by marking one or both check boxes:
 - Start new page after each employee
 - Start new page after each day
8. Click Printer Setup to enter your printer settings:
 - Paper: size and source
 - Orientation: portrait or landscape
 - Margins: top, bottom, left and right
9. Click Preview.

Print Reports

- 1.** Click Reports menu, and select the report:
 - Daily Appointment Sheet
 - Appointments by Employee
 - Appointments by Customer
 - Employee Productivity
 - Services Summary
 - Waiting List
 - Customer List
- 2.** Enter a Report Title/Header, or use the default title.
- 3.** Mark the check box to print in color, if desired.
- 4.** Select the employees or customers for your report by marking the appropriate check box(es). Or, use the Select All or Clear All buttons.
- 5.** Enter the Date Range for your report with a Start and End date.
- 6.** Make the appropriate selections to indicate the information you want in the report, such as name, phone number, or email address.
- 7.** Set your Page Breaks by marking one or both check boxes:
 - Start new page after each employee
 - Start new page after each day
- 8.** Click Printer Setup to enter your printer settings:
 - Paper: size and source
 - Orientation: portrait or landscape
 - Margins: top, bottom, left and right
- 9.** Click Preview.

Or, click Preview to view before printing, and then click Print to print your report.

Sample Reports

Daily Appointment Sheet:

This report displays every appointment for each employee for the date you select. You can also choose to include available time, providing “write-in” space on printed copies. Example: You may wish to distribute this report to each employee when they arrive for work, giving them a schedule of the appointments to expect during their shift.

Daily Appointment Sheet - Wednesday, November 15, 2006			
Jill P Anderson			
10:00 am	10:45 am	Sampson, Gina B, Mom: 111-555-1098 Children's Cut	<input type="checkbox"/>
11:30 am	01:30 pm	Norton, Melonie J, 111-555-4163 Cut & Highlight	<input type="checkbox"/>
01:45 pm	02:15 pm	Birch, Norton T, 111-555-2208 Cut only	<input type="checkbox"/>
02:15 pm	03:15 pm	Ogden, Mandy E, 111-555-3411 Shampoo & cut	<input type="checkbox"/>

Appointments by Employee:

This report displays a list of appointments segmented by employee. Also, you can choose to include the status of each appointment, such as confirmed or canceled. Example: You may wish to use this report to determine an employee's confirmed appointments for a particular date or range of dates.

Appointments by Employee - 11/15/2006 - 11/15/2006			
Jill P Anderson			
11/15/2006			
10:00 am	10:45 am	Sampson, Gina B Phone: Mom: 111-555-1098	
11:30 am	01:30 pm	Norton, Melonie J Phone: 111-555-4163	
01:45 pm	02:15 pm	Birch, Norton T Phone: 111-555-2208	
02:15 pm	03:15 pm	Ogden, Mandy E Phone: 111-555-3411	

Appointments by Customer:

This report displays a list of appointments segmented by customer. Also, you can choose to include the status of each appointment, such as past, future, all, or those in a selected date range.

Example: You may wish to use this report to refer to services rendered during particular appointments, or to remind employees of customer preferences before an upcoming appointment.

Appointments by Customer (All)	
Abbott, Marilyn T Phone:	
11/15/2006	01:00pm-02:30pm
06/20/2005	02:00pm-03:30pm
Birch, Norton T Phone: 111-555-2208	
11/15/2006	01:45pm-02:15pm
Buchanan, Jackson R Phone: 111-555-3974	
11/15/2006	12:00pm-12:45pm
Carter, Jessica B Phone: 111-555-9657	
11/20/2006	10:00am-11:00am
11/15/2006	01:00pm-03:00pm
Mickelsen, Jamie P Phone: 111-555-7514	
11/15/2006	12:15pm-12:45pm
Norton, Melonie J	

Employee Productivity:

This report provides productivity information for employees during specified time frames. This report totals the number of hours the employee was available and uses that number to divide by the total hours utilized and provides a productivity score.

Example: You may wish to use this report to review employee performance as it relates to regular reviews.

Employee Productivity Report 11/14/2006 - 11/21/2006		
Sue T Arnold	Stylist	
Service	Appts. Hours	Percent (%)
Cut & Highlight	2.00	53.34%
Shampoo, Cut, & Style	1.25	33.33%
Cut only	0.50	13.33%
Totals	3.75	100.00%
Total Avail. Hours	102.00	
Total Appt. Hours	3.75	
Employee Utilization	3.68%	

Services Summary:

This report provides a summary of the services utilized by customers within a selected date range. The summary includes a list of unique services performed, how many of each were performed, a percentage breakdown of the appointments, as well as the percentage of hours of service and the average duration of a service.

Example: You may wish to use this report as a tool to analyze services provided and the typical duration to make scheduling more efficient.

Services Summary Report 11/14/2006 - 11/21/2006					
Service	Number of Appts.	Percent (%)	Number of Hrs.	Percent (%)	Avg. Appt. Length
Shampoo & cut	3	30.00%	2.75	24.44%	0h 55m
Cut & Highlight	2	20.00%	4.00	35.56%	2h 0m
Shampoo, Cut, & Style	2	20.00%	2.75	24.44%	1h 22m
Cut only	2	20.00%	1.00	8.89%	0h 30m
Children's Cut	1	10.00%	0.75	6.67%	0h 45m
Totals	10	100.00%	11.25	100.00%	

Waiting List:

This is a list of customers on your waiting list by employee for a specified date range.

Example: You may wish to print an upcoming week of waiting list appointments and try to fit them in to different time slots.

Waiting List Report		
(Any)		
Range	Duration	
11/20/2006 - 11/20/2006	0h 30m	Birch, Norton T
10:00 am - 05:30 pm		Phone: 111-555-2208
Sunday - Wednesday, Friday, Saturday		

Customer List Report:

This report provides the information you need to keep track of your customers, their contact information, and the frequency of their visits. Create reports that display all customers, customers with appointments in a specified date range, and customers that have not had appointments since a particular date.

Example: You may wish to call all customers who have not scheduled an appointment in the past six months to give them a special offer if they book for the current month. Use this report to create the list you need that includes their names and phone numbers.

Customer List					
Name			Phone	Alt. Phone	Email
Abbott	Marilyn	T			
Birch	Norton	T	111-555-2208		
Buchanon	Jackson	R	111-555-3974		
Carter	Jessica	B	111-555-9657		jcarter@mymail.com
Mickelsen	Jamie	P	111-555-7514		
Norton	Melonie	J	111-555-4163		
Ogden	Mandy	E	111-555-3411		
Randall	Samantha	R	111-555-6642		
Sampson	Gina	B	Mom: 111-555-1098		

Using Email, Letters & Invoices

With **Customer Appointment Manager** you can use the Email and Letters features to send messages and mailings to your customers, such as appointment reminders, special offers, discount coupons, and thank you letters. You can author a customized message or letter for one customer or several customers to receive. You also can prepare mailing labels for your letters. QuickBooks users can even create invoices directly from **Customer Appointment Manager**. Procedures in this chapter describe how to:

- Send a Message
- Send a Reminder
- Create a Letter
- Publish Letters
- Print Mailing Labels
- Create Invoices with QuickBooks

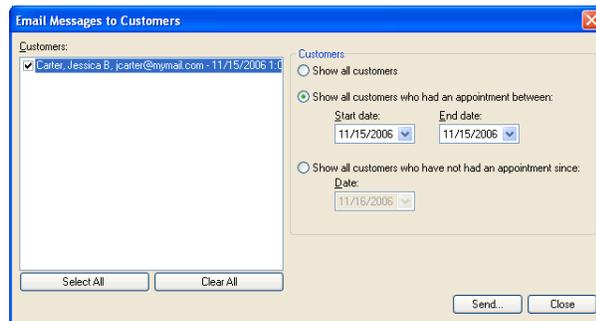
Sending Email Messages

Messages

Use this to launch your email client, such as Microsoft Outlook, and author your own message to send to one customer, several customers, or all customers.

To send a message:

1. From the Tool menu, select Email, and Message to Customers.



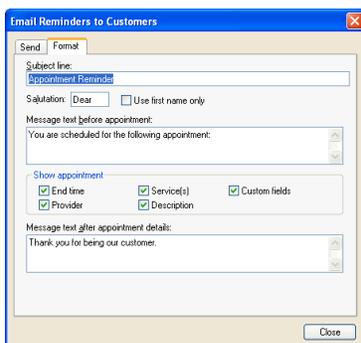
2. Select the customer type to display in the customers list:
 - Show all customers
 - Show all customers who had an appointment between (start/end dates)
 - Show all customers who have not had an appointment since (date)
3. Select one customer or several customers you want to send the message to. Or, use the Select All and Clear All buttons.
4. Click Send.
5. In your email client, enter your subject and prepare your message.
6. Click Send.

Reminders

Use this to send an upcoming email appointment reminder to one customer, or to several customers at the same time.

To send a reminder:

1. Click the Tool menu, select Email, and Reminders to Customers.
2. In the Send tab, enter the date range for the appointment reminders and click the Search Appointments button.



Note: If you decide to change the date range, click the Search Appointments button again to refresh the list.

3. Click the Format tab and enter your subject line and salutation.
4. Mark the Use first name only check box to choose that format, and add a salutation, if desired.
5. Set up reminder content by making your Show Appointment selections:
 - End Time
 - Provider
 - Services
 - Description
 - Custom Fields

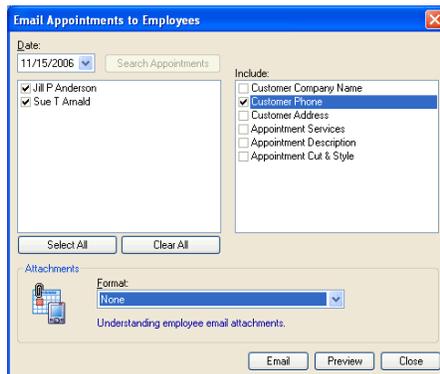
6. Select and enter the format for the text that will appear with the appointment details:
 - Enter the Text before appointment
 - Mark your Show appointment preferences
 - Enter the Text after appointment details
7. Click Send in the Send tab.

Appointments

Use this to send appointment information to your employees.

To send an appointment message:

1. From the Tools menu, select Email > Appointments to Employees.



2. Enter or select the date and click Search Appointments.

Note: If you change the date range, click Search Appointments to refresh.

3. Select each appointment to include in the email, or click Select All to include every appointment listed.
4. Mark the check box for the information you would like included with the appointment:

- Customer Company Name
 - Customer Phone
 - Customer Address
 - Appointment Services
 - Appointment Description
5. Make attachment selections, if needed.
 6. Click Email.
 7. In your email client, enter your subject and prepare your message.
 8. Click Send.

Preparing Letters

Create or Edit Letters

Use this option to create a new, customized letter, or to edit or delete an existing letter that you will use for a customer mailing.

To create or edit letters:

1. From the Tool menu, select Letters, and Create/Edit.



2. Choose the option you need:
 - New
 - Edit
 - Delete
3. Enter a name for your letter and click OK to open a new letter in Microsoft Word. Continue to step 5 of this procedure.
4. Choose a letter from the list and click Delete to remove the letter, or click Edit to open the letter in Microsoft Word.
5. Select from the CAM Merge Fields list to insert customer information, such as names and addresses, as you author or edit the letter.
6. Save your letter by clicking the File menu in Word and selecting Save As. Enter a name for your letter file, and click Save to save the letter in your CAMMergeFiles folder.

Publish Letters

Use this option to merge your customer information with the form letter you customized using the Create or Edit Letters option.

To publish letters:

1. From the Tool menu, select Letters and Publish.
2. Choose the Customers option you need:
 - Show all customers
 - Show all customers who had an appointment between:
 - Show all customers who have not had an appointment since:
3. Enter start and end dates to identify customers with appointments that occurred in a defined time period. Or, enter a date to identify customers who have not returned since that date.
4. Mark the check box for each customer that you want to receive a letter, or use the Select All and Clear All buttons.

Note: You also can sort the Customers list by last name or zip code.

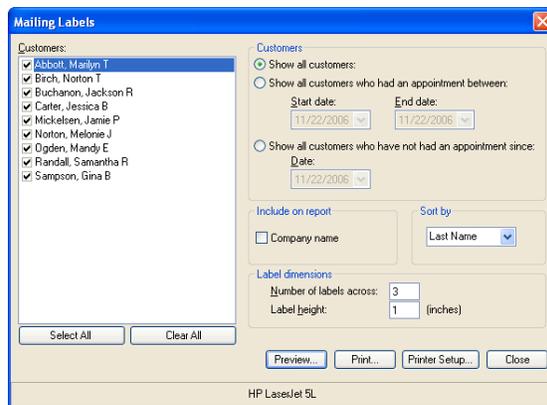
5. Click the name of the letter to publish in the Select Letter to Publish list.
6. Click Publish and a Microsoft Word file that has a letter prepared for each customer selected will open.
7. Print the letters using Microsoft Word, or Save the file for later use.

Print Mailing Labels

Use this option to prepare and print mailing labels that you can use to send customers appointment reminders, discount coupons, and other information.

To print mailing labels:

1. From the Tools menu, select Letters and Mailing Labels.



2. Choose the Customers option you need:
 - Show all customers
 - Show all customers who had an appointment between:
 - Show all customers who have not had an appointment since:

3. Mark the Company name check box to include it in the labels.
4. Mark the check box for each customer that you want to include in the mailing labels, or use the Select All and Clear All buttons.

Note: You also can sort the Customers list by last name or zip code.

5. Enter the label dimensions in the Number of labels across and Label height fields.
6. Click Preview to look at the labels before printing, or click print to produce labels for the customers you selected.

Creating QuickBooks Invoices

Users of QuickBooks Pro/Premier 2005 or Enterprise 2.0 (or newer versions) can prepare customer invoices without leaving **Customer Appointment Manager**.

To create an invoice:

1. Open your QuickBooks company file, and return to **Customer Appointment Manager**.
2. Locate the appointment requiring an invoice and select it.
3. Right-click to display the Create QuickBooks Invoice option.
4. The customer's name and service information entered in the appointment are automatically added to the invoice for you.
5. Complete the invoice as needed.

