

# **APPOINTMENTS MANAGER**

User Guide

**SOLAR FIRE**

# Contents

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|  |    |
|--|----|
| Add a client.....                          | 3  |
| Modify a client details .....              | 4  |
| Add an appointment.....                    | 5  |
| Modify an appointment.....                 | 6  |
| Record time of an appointment .....        | 7  |
| Record voice of an appointment .....       | 8  |
| View and edit a receipt.....               | 9  |
| Send an email to many clients.....         | 10 |
| Send an appointment reminder by email..... | 11 |

# Add a client

The screenshot shows the 'Appointments Manager' application with the 'Clients' tab selected. The 'Client Details' form is open, showing fields for personal and contact information. Three callout boxes provide instructions:

- 1. Click clients tab**: Points to the 'Clients' tab in the 'Appointments Manager' window.
- 2. Fill the information**: Points to the 'Client Details' form.
- 3. Click Add**: Points to the 'Add' button in the 'Clients' list.

**Appointments Manager - Clients**

| Lastname      | Firstname | Birthdate |
|---------------|-----------|-----------|
| tata lastname | tata      | 4/05/1999 |
| toto          | toto1     | 5/05/1955 |
| toto          | toto2     | 5/05/1955 |
| toto          | toto3     | 5/05/1955 |

**Appointment history**

| All Appointments    | Duration         | Notes |
|---------------------|------------------|-------|
| 21/05/2011 12:15 PM | 0 hour 0 min 0 s |       |
| 28/04/2011 01:31 PM | 0 hour 0 min 2 s |       |

**Client Details**

Title: Mr.  
Firstname: tata  
Lastname: tata lastname  
Address1: my address 1 william street  
Address2: stair 2 ABC#  
City: Adelaide the city  
State/Province: south australia / here  
ZIP/Postal Code: 4512 ABd  
Country: Autsralia Oceania  
Phone (Home): +56 20114 445  
Phone (Work): +663 5414 5555 666  
Cell/Mobile: 045632145 552  
Fax: 032114569  
Email: tata.heremail.persom@email.com  
Website: http://thewebsite.ofata.blogs.austa.  
Skype: myskypeadresse  
Birthdate: 4/05/1999 Time: 12:00 AM  
Birth place: Austryyy adfsa ss  
Notes: she is a nice person  
his brother is also nice

# Modify a client details

**1. Click clients tab**

**2. Modify the information**

**3. Click Save**

**Appointments Manager**

Appointments | Session | **Clients** | Other Information

**Clients**

| Lastname      | Firstname | Birthday  |
|---------------|-----------|-----------|
| tata lastname | tata      | 4/05/1999 |
| toto          | toto1     | 5/05/1955 |
| toto          | toto2     | 5/05/1955 |
| toto          | toto3     | 5/05/1955 |

**Appointment history**

| All Appointments    | Duration         | Notes |
|---------------------|------------------|-------|
| 21/05/2011 12:15 PM | 0 hour 0 min 0 s |       |
| 28/04/2011 01:31 PM | 0 hour 0 min 2 s |       |

**Client Details**

**Title:** Mr.

**Firstname:** tata

**Lastname:** tata lastname

**Address1:** my address 1 william street

**Address2:** stair 2 ABC#

**City:** Adelaide the city

**State/Province:** south australia / here

**ZIP/Postal Code:** 4512 ABd

**Country:** Autsralia Oceania

**Phone (Home):** +56 20114 445

**Phone (Work):** +663 5414 5555 666

**Cell/Mobile:** 045632145 552

**Fax:** 032114569

**Email:** tata.heremail.persom@email.com

**Website:** http://thewebsite.ofata.blogs.austa.

**Skype:** myskypeadresse

**Birthdate:** 4/05/1999 **Time:** 12:00 AM

**Birth place:** Austryyy adfsa ss

**Notes:** she is a nice person  
his brother is also nice

**Buttons:** Add, Save, Delete, Toggle Select, Email Clients, Close

# Add an appointment

**1. Click clients tab**

**2. Select a client**

| Client        | Firstname | Birthdate |
|---------------|-----------|-----------|
| tata lastname | tata      | 4/05/1999 |
| toto          | toto1     | 5/05/1955 |
| toto          | toto2     | 5/05/1955 |
| toto          | toto3     | 5/05/1955 |

**3. Click appointments tab**

**4. Enter a time**

**4. Select a day**

**5. Click Add**

**4. Write notes**

# Modify an appointment

The screenshot shows the 'Appointments Manager' window with the following components and callouts:

- 2. Enter a new time:** Points to the 'Appointment Time' input field containing '02:30 PM'.
- 1. Select an appointment:** Points to a row in the 'Appointments for Day' table with a blue highlight.
- 3. Enter new:** Points to the 'Appointment Notes' text area.
- 4. Click Save:** Points to the 'Save' button in the 'Appointment' section.

**Appointments Manager**

Appointments | Session | Clients | Other Information

Appointment Time: 02:30 PM

April 2011

| Mon | Tue | Wed | Thu | Fri | Sat | Sun |
|-----|-----|-----|-----|-----|-----|-----|
| 28  | 29  | 30  | 31  | 1   | 2   | 3   |
| 4   | 5   | 6   | 7   | 8   | 9   | 10  |
| 11  | 12  | 13  | 14  | 15  | 16  | 17  |
| 18  | 19  | 20  | 21  | 22  | 23  | 24  |
| 25  | 26  | 27  | 28  | 29  | 30  | 1   |
| 2   | 3   | 4   | 5   | 6   | 7   | 8   |

Today: 13/04/2011

| Time     | Client    |
|----------|-----------|
| PM 02:30 | test test |

Appointments for Day

Appointment: Add, Save, Delete

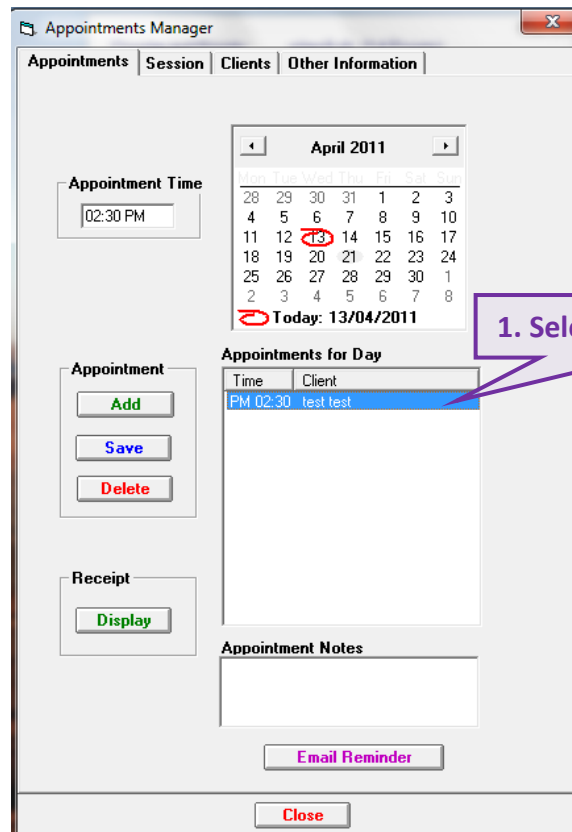
Receipt: Display

Appointment Notes

Email Reminder

Close

# Record time of an appointment

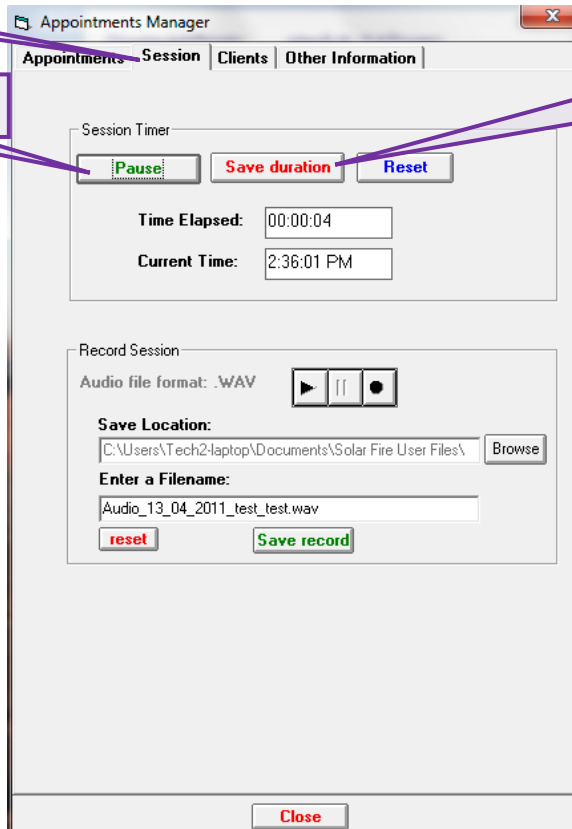


1. Select an appointment

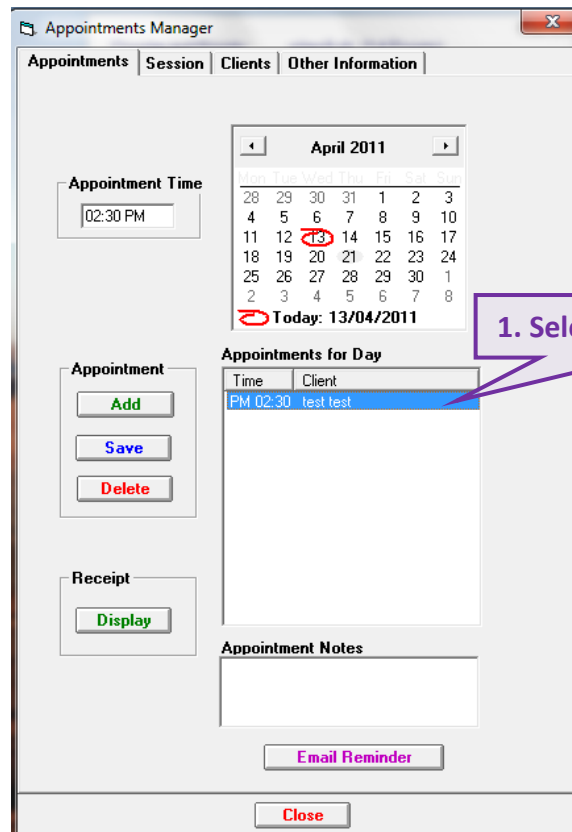
2. Click Session tab

3. Click Start

3. Click Save at the end of the appointment



# Record voice of an appointment



1. Select an appointment

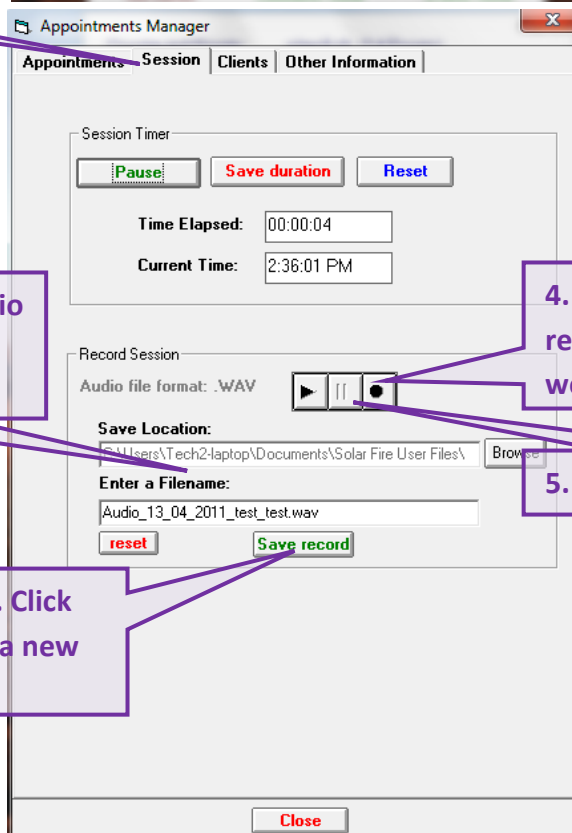
2. Click Session tab

3. Select the folder where the audio file will be saved and enter the name of the audio file

4. Click round button to start recording (be sure your microphone works)

5. Stop the recording

6. Click Save to save the file. Click on reset to delete and start a new audio file





# View and edit a receipt

1. Click Other Information tab

Appointments Manager

Appointments | Session | Clients | **Other Information**

Receipt preferences:

Currency Symbol: \$ Currency name: Dollar

Your Hour Rate: 60

Tax rate (%): 15.5 Tax name: GST

Close

2. Enter the details used to generate the receipts

Appointments Manager

Appointments | Session | Clients | Other Information

Appointment Time: 02:30 PM

April 2011

| Mon | Tue | Wed | Thu | Fri | Sat | Sun |
|-----|-----|-----|-----|-----|-----|-----|
| 28  | 29  | 30  | 31  | 1   | 2   | 3   |
| 4   | 5   | 6   | 7   | 8   | 9   | 10  |
| 11  | 12  | 13  | 14  | 15  | 16  | 17  |
| 18  | 19  | 20  | 21  | 22  | 23  | 24  |
| 25  | 26  | 27  | 28  | 29  | 30  | 1   |
| 2   | 3   | 4   | 5   | 6   | 7   | 8   |

Today: 13/04/2011

Appointments for Day

| Time     | Client    |
|----------|-----------|
| PM 02:30 | test test |

Appointment: Add Save Delete

Receipt: Display

Appointment Notes

Email Reminder

Close

3. Select an appointment

4. Click on Display to see the receipt in your text editor

# Send an email to many clients

The screenshot shows the 'Appointments Manager' application window. The 'Clients' tab is selected, displaying a table of clients and an 'Appointment history' section. Four callouts provide instructions on how to send an email to multiple clients:

- 1. Click Clients tab**: Points to the 'Clients' tab in the top navigation bar.
- 2. Click Toggle Select**: Points to the 'Toggle Select' button at the bottom of the window.
- 3. Tick the boxes to select your clients**: Points to the checkboxes in the 'Clients' table.
- 4. Click Email Clients**: Points to the 'Email Clients' button at the bottom of the window.

**Appointments Manager**

Appointments | Sessions | **Clients** | Other Information

**Clients**

Select All

| Client                              | Lastname | Firstname | Birthday  |
|-------------------------------------|----------|-----------|-----------|
| <input checked="" type="checkbox"/> | client1  | client1   | 5/05/1989 |
| <input type="checkbox"/>            | client2  | client2   | 5/05/1989 |
| <input checked="" type="checkbox"/> | client3  | client3   | 5/05/1989 |

**Appointment history**

| All Appointments | Duration | Notes |
|------------------|----------|-------|
|------------------|----------|-------|

Buttons: Add, Save, Delete, Toggle Select, Email Clients, Close

# Send an appointment reminder by email

