

APPOINTMENTS MANAGER

User Guide

SOLAR FIRE

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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
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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	Appointment	Duration	Notes
tata lastname	tata	4/05/1999	
toto	toto1	5/05/1955	
toto	toto2	5/05/1955	
toto	toto3	5/05/1955	

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	

3. Click appointments tab

4. Enter a time

4. Select a day

5. Click Add

4. Write notes

Appointment	Time	Client

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 'PM 02:30' and 'test test'.
- 3. Enter new:** Points to the 'Appointment Notes' text area.
- 4. Click Save:** Points to the 'Save' button in the 'Appointment' section.

Appointments Manager

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

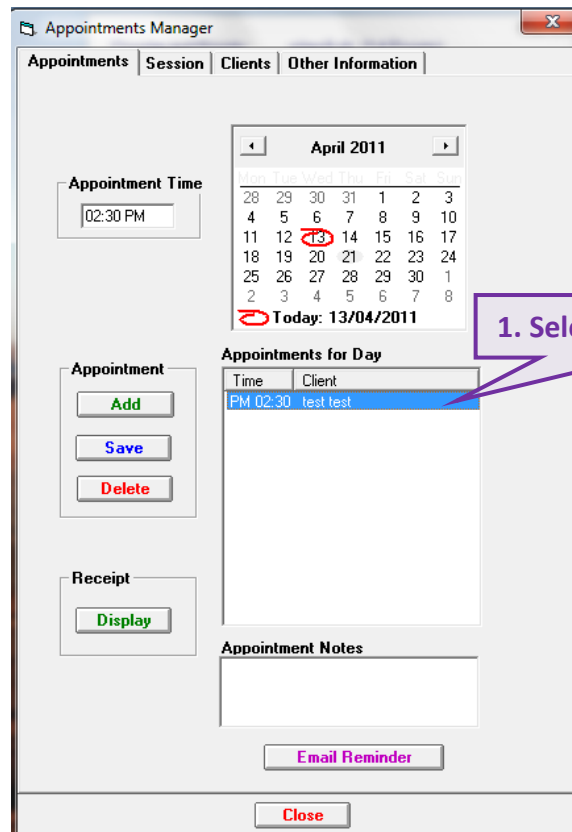
Today: 13/04/2011

Time	Client
PM 02:30	test test

Appointment Notes

Buttons: Add, Save, Delete, Display, Email Reminder, Close

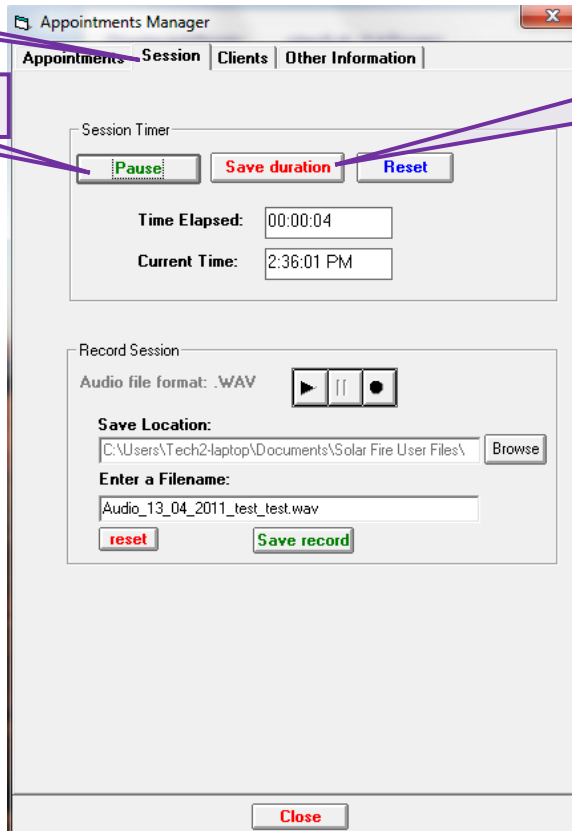
Record time of an appointment



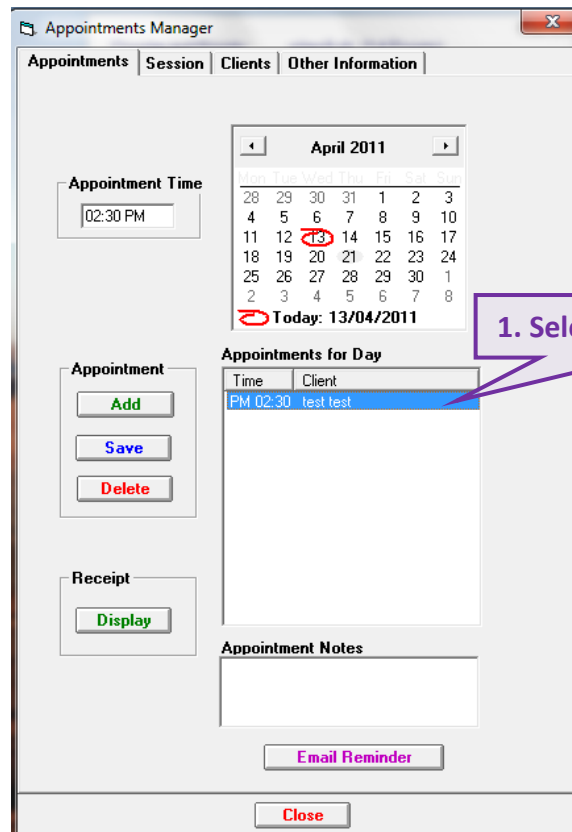
2. Click Session tab

3. Click Start

3. Click Save at the end of the appointment

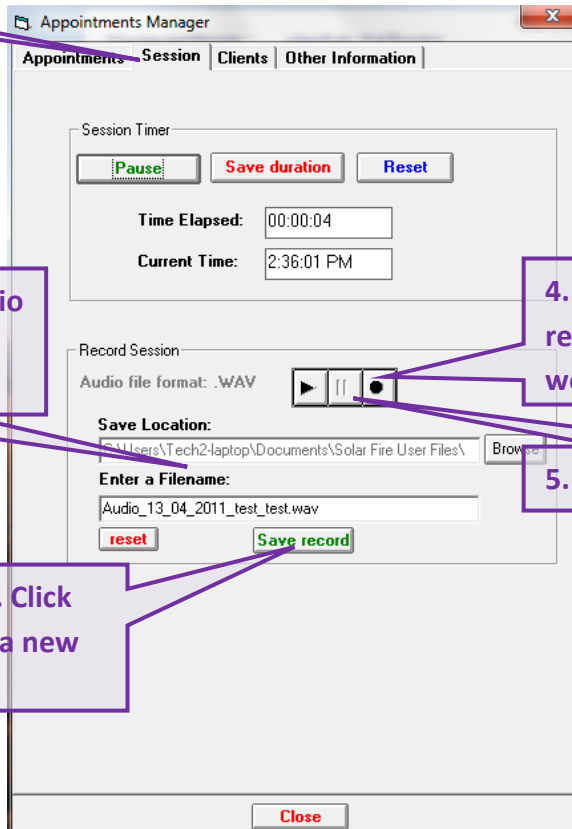


Record voice of an appointment



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 select clients and send emails.

1. Click Clients tab

2. Click Toggle Select

3. Tick the boxes to select your clients

4. Click Email Clients

Clients			
Select All	Clients		
	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

