

JUUT Bookings

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The purpose of this guide is to provide you with quick reference points for the most common booking scenarios you may encounter in your Juut frontline position.

Because this is a reference guide, the steps explaining the procedures are deliberately kept as brief as possible and illustrations are provided to aid understanding. If you need a more in-depth discussion of the booking process (and its related subject – checkouts), refer to KORVUE online help and the other user documentation provided by Verasoft. **WHAT YOU NEED TO KNOW – READ THIS FIRST**

Occasionally, you may find out that some of the actual screens and procedure steps on your workstation may differ from what is described here. This may happen if some specific custom settings are in effect, either for your entire KORVUE system or for your particular workstation.

KORVUE offers 3 appointment booking methods, which differ in speed and in how detailed the information you enter about the appointment is:

- **Insta-Booking** – fastest, lowest level of detail
- **FastBooking** – fast, medium level of detail
- **Advanced Booking** – most detailed, optimum balance between booking speed and level of detail, plus Advanced Availability Search capabilities (automated finding of available time slots suitable for the appointment)

Which method to use depends on what the service you are booking is:

- Insta-Booking – **use it for the services listed in the the Insta-Booking menu** (Refer to the first picture in the Insta-Booking procedure description on page 5.). Typically, these are the common services for a domain (e.g. Hair Cut, Neck Trim, Bang Trim, Brow Wax, 60-Minute Massage, Basic/Mini Manicure, Basic/Mini Pedicure)
- FastBooking – **use it for the common services when you need more control over the appointment data.** For instance, when you need to change the provider, add an assistant, or specify a resource.
- Advanced Booking – **use it for multiple or complex appointments**, or when an appropriate opening for the appointment is not immediately visible in the Scheduler (Use Advanced Availability Search in this case, see “Booking Complex Appointments (Advanced Availability Searching)” on page 32.)

When Insta-Booking or FastBooking, you need to first find an available opening with a particular provider in the Scheduler and make sure the requested service fits into that opening. If unsure of the duration of the service with that provider, it is a good idea to check that duration first in order to prevent getting availability errors later when the actual Insta-Booking or FastBooking is attempted. If unsure of the appointment duration or if you cannot find a suitable opening in the Scheduler, use the Advanced Booking procedure and take advantage of the Advanced Availability Search feature.

During the booking procedure, you may need to update the guest’s client record or, in case of a new client, create such a record. This can be done without quitting the booking procedure and is duly explained in the Insta-Booking and FastBooking chapters.

The booking procedures instructions in this book presume you are booking a single service; the individual steps needed for the more complex cases, like booking combos and packages, adding products, etc., are given as separate topics in chapter “Some Complex Booking Scenarios” on page 25; you simply have to perform these steps in the appropriate place of the Advanced Booking procedure.

And, finally: **before starting any booking procedure, make sure that you are logged in.**

Booking Appointments Overview

Booking appointments is done in the Schedule screen (aka. “the Scheduler”). It is accessible from the Director screen by pressing F4 or by clicking the F4 Scheduler button on the Navigation bar:



The suggested way to book an appointment is as follows:

1. **Locate an appropriate time slot** (page 4)
2. *(Optional)* **Check the duration of the service with the chosen provider** (page 4)
3. **Use the Booking procedure** (page 5):

Insta-Booking:	FastBooking /Advanced Booking:
3.1. Start the procedure	3.1. Start the procedure
3.2. Add the service to the appointment	3.2. Add the guest’s name to the appointment (<i>see the note beneath the table</i>) (page 9)
3.3. Add the guest’s name to the appointment (<i>see below</i>) (page 9)	3.3. Add the service to the appointment

Note:

Adding the guest’s name to the appointment (step 3.3. in Insta-Booking and 3.2. in Fast Booking,) includes:

- 3.X.1. Search for the client record
 - 3.X.1.1. Search by telephone number
 - 3.X.1.2. *(If not found)* Search by client name
- 3.X.2. *(If no or outdated record)* Update or create the client record
 - 3.X.2.1. *(if found and updating is appropriate)* Update the client record
 - 3.X.2.2. *(if not found = new client)* Create the client record

4. **Verify the appointment** (client, provider, service, date and time) (page 14)

The above is the “big picture”, the what-to-do checklist for the procedure. For the how-to information (the details), see the topics that follow. (Each major step in the process described above comprises a numbered sub-chapter in the book.)

1. Locating an Appropriate Time Slot

*If **a specific provider** has been requested:*

In the Schedule [F4] screen, **navigate to the required date in the Scheduler and find an appropriate opening.** (Change the View of the Calendar if necessary.)

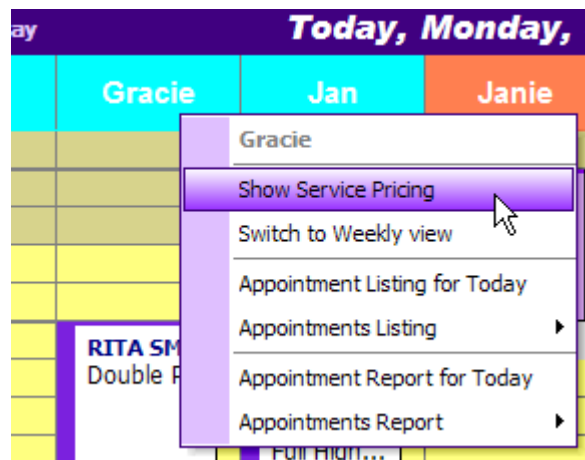
*If **no specific provider** has been requested:*

In the Schedule [F4] screen, navigate to the required date. (Change the View of the Scheduler if necessary. **Find an appropriate opening** for a given time in accordance with **priority booking** (starting from the left and going to the right).

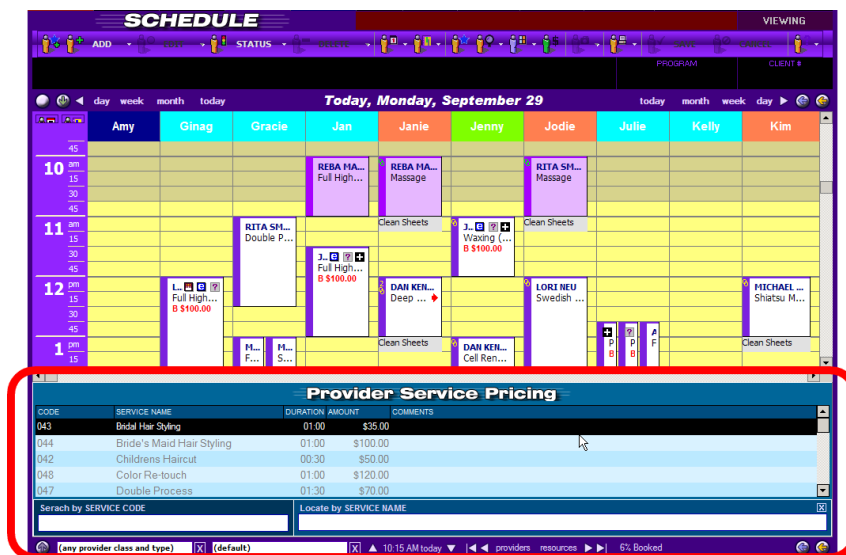
2. (Optional) Checking the Duration of the Service with the Chosen Provider

To check the duration of the service with a particular provider you need to open the Service Pricing panel. In it, all services done by the provider are listed together with their durations.

2.1. **Open the Provider Service Pricing panel.** To do this, **right-click on the provider's name** (the header of the provider's column) and from the context menu that appears, **select "Show Service Pricing"**:



The Provider Service Pricing panel opens at the bottom of the Scheduler, listing the timings and prices for the provider:



2.2. **Check the duration of the requested service** with the provider. (Keep in mind that the individual provider's duration for a particular service (if such individual duration exists), always takes precedence over the standard service duration.)

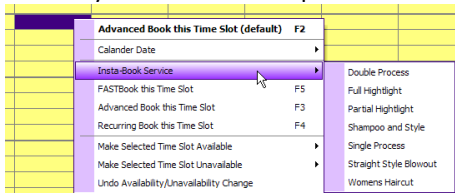
2.3. **Close the Provider Service Pricing panel.** To do this, click anywhere within the Scheduler.

3. The Booking Procedure

Insta-Booking:

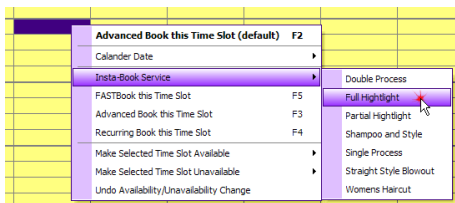
3.1. Start the procedure:

Right-click on the time slot matching the beginning of the service and then, in the context menu that appears, **hover the mouse pointer over the Insta-Book Service option**. A sub-menu listing the services you can book will open:

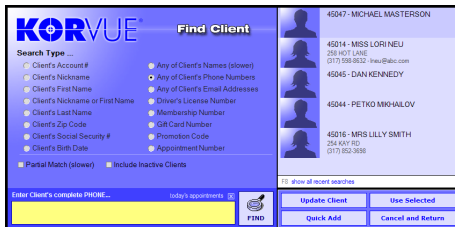


3.2. Add the service to the appointment:

In the sub-menu, click the desired service:



This will cause the Find Client dialog to pop up:



Proceed with adding the guest's name to the appointment.

3.3. Add the guest's name to the appointment. Refer to 3.X. Adding the Guest's Name to the Appointment chapter.

FastBooking:

3.1. Start the procedure:

Click on the time slot matching the beginning of the service and then press F5.

Note: If you don't remember the F5 shortcut, just right-click the time slot and from the context menu that appears, select "FastBook This Time Slot."

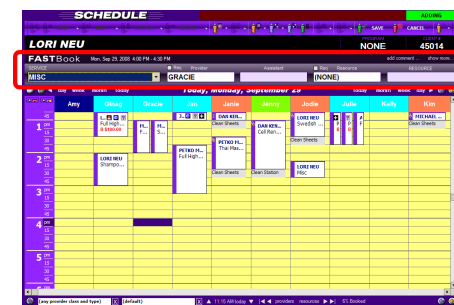
The Find Client dialog appears:



3.2. Add the guest's name to the appointment. Refer to 3.X. Adding the Guest's Name to the Appointment chapter (page 9). After successfully adding the guest's name, proceed to step 3.3.

3.3. Add the service to the appointment:

Once the guest's name has been added, the Fast Book panel will appear above the Scheduler and the screen will switch to ADDING mode (Note that the service provider in whose column you have started the process is now shown as default in the Provider field):



3.3.1. (Optional) If you need to change the provider, you can do it from the Provider drop-down list (Point and click the provider field to open the drop-down list.):

Advanced Booking:

3.1. Start the procedure:

Click on the time slot matching the beginning of the (first) service and then press F3.

Note: If you don't remember the F3 shortcut, just right-click the time slot and from the context menu that appears, select "Advanced Book This Time Slot."

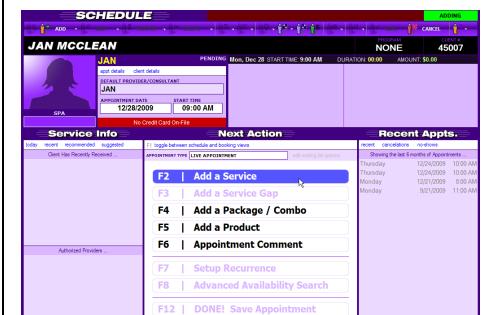
The Find Client dialog appears:



3.2. Add the guest's name to the appointment. Refer to 3.X. Adding the Guest's Name to the Appointment chapter (page 9). After successfully adding the guest's name, proceed to step 3.3.

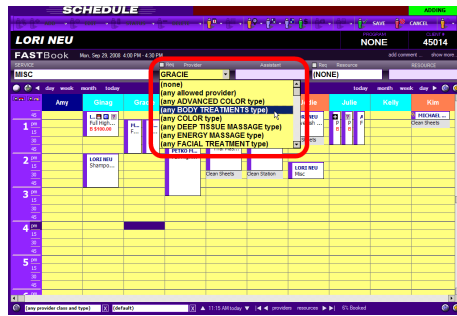
3.3. Add the service to the appointment.

Once the guest's name has been added, the Scheduler will be replaced by the Advanced Book and the screen will switch to ADDING mode:

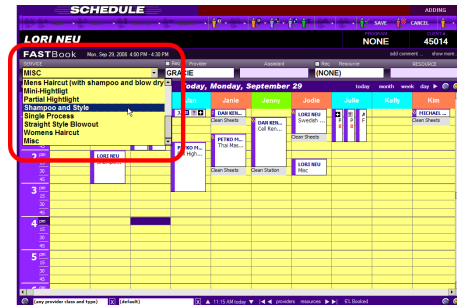


3.3.1. Make sure that, in the Next Action panel, the "F2 | Add Service" option is highlighted and then **press the Enter key**. Otherwise, either press F2 or simply click the option (See the picture above.)

This will open the Add Service panel with the Locate by SERVICE NAME field at the bottom of the screen highlighted in yellow and ready for your input:

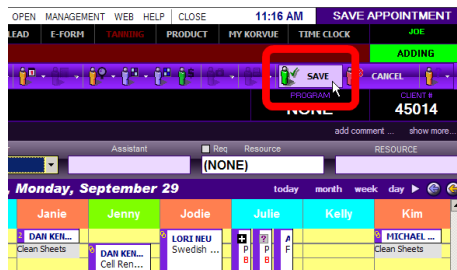


3.3.2. From the **SERVICE** drop-down list, select the desired service (only the services for the selected provider are shown):



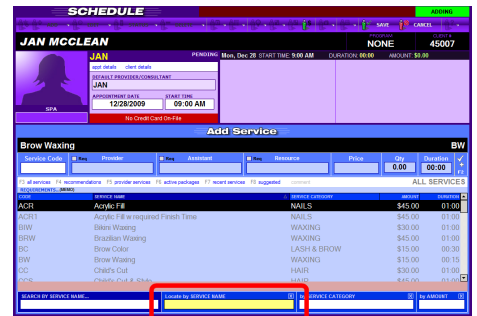
Tip: As a faster alternative, you can type in the name of the service in the field; typically, you don't have to type the whole name because KORVUE automatically displays the first match found as you type.

3.3.3. Once the correct provider and service have been chosen, **save the appointment by clicking the SAVE button** on the Schedule [F4] screen toolbar (Shortcut: F12):



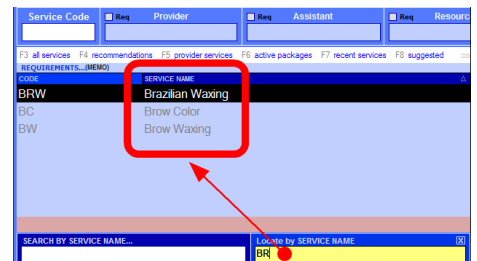
This should close the FastBook panel and add the appointment to the Scheduler (the booking procedure is now over) unless your system is set to ask you for some additional information. If the latter is the case, proceed to the next step.

3.3.4. (Conditional) Depending on your KORVUE system settings, you may be prompted for some additional information like as to whether or not the



3.3.2. Locate the service in the listing by **typing its name in the Locate by SERVICE NAME field**.

Note that, as you type, the list of matching services narrows down making it easier to pin-point the service you want.

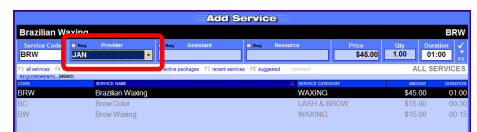


Also, if you type in a longer portion of the service name (and type it correctly), the service you want will remain the only one on the list.

Tip: If you know the code of the service, you can use the Service Code field instead (the utmost-left field in the picture above). This is the fastest way to locate a service.

3.3.3. Once you have found the service in the list, **make sure it is selected** (highlighted). If not, either click it or use the Up and Down Arrow keys (↑ and ↓) on your keyboard to navigate the highlight to it.

3.3.4. **Press the Enter key.** This will add the service details to the fields above the services listing with the default provider listed in the Provider field. The Provider field is also highlighted, which means that you can change the provider if you want to:



In addition to that, the service is added to

provider has been requested:

Handle such prompts as necessary. (There can be more than one prompt.) When you have responded to the last prompt, the appointment will be added to the Scheduler and the booking procedure – finalized.

Tip on the Requested Provider prompt:

A provider is considered “Requested” only in the “New Request” or “Return Request” scenarios. If a provider has been referred to a provider by another provider or based upon your recommendation or upon the priority booking order, then he is not considered “Requested”. (Referring by a salon employee is equivalent to the “Salon Referral” scenario.)

Note: While the FastBook panel is open, clicking on any other time in the Scheduler will cause the appointment to be booked at that time. This is designed as an easy way to change the appointment time but can lead to incidental errors, so be careful! If you click in another column, the provider will not change since the operation has been started from a particular provider column, but the time *can* change.

the list of services for the appointment:

3.3.5. Change the provider, if necessary, by selecting another one from the drop-down list (you can also type the first letter(s) of the name for faster navigation and then press “Enter”), and then **confirm the chosen provider by pressing “Enter.”**

This will move the highlight to the Duration field:

3.3.6. Change the duration, if necessary, by directly typing the desired duration into the field, and then **confirm the duration by pressing “Enter.”**

Tip: Another way to change the numbers in the Duration field is to drag and highlight the part of the time you want to change (the hours, the tens of minutes or the minutes) and then to use the spin buttons at the right boarder of the field.

Tip: If you want to add another service, instead of pressing the Enter key, either press F2 or click the



button at the utmost right of the details row:

This will add the current service to the appointment and let you add another one. (Repeat steps 3.3.2.-3.3.6. now.) **End of Tip**

Pressing “Enter” will close the Add Service panel and take you back to the Next Action panel with the “F12 | DONE! Save Appointment” option pre-selected (highlighted) so can finalize the appointment by just pressing “Enter”

again:

The screenshot shows the KORVUE software interface for scheduling an appointment for JAN MCCLEAN. The top section displays client information and appointment details. The 'Next Action' panel is open, showing a list of actions to be performed. The 'DONE! Save Appointment' option is highlighted at the bottom of the list.

Service Info	Next Action	Recent Appts.
Service Info Client Name: JAN MCCLEAN Appointment Date: 12/28/2009 Appointment Time: 09:00 AM Service Code: 12/28/2009 Service Description: 09:00 AM Quantity: 1.00 Amount: \$45.00	Next Action F2 Add a Service F3 Add a Service Gap F4 Add a Package / Combo F5 Add a Product F6 Appointment Comment F7 Setup Recurrence F8 Advanced Availability Search F12 DONE! Save Appointment	Recent Appts. Showing the last 6 appointments of appointments Thursday 12/24/2009 10:00 AM Thursday 12/24/2009 10:00 AM Monday 12/21/2009 9:00 AM Monday 12/21/2009 11:00 AM

3.3.7. (Optional) Add other services, service gaps, products, or comments to the appointment as necessary. (For details on these and some other more advanced booking scenarios, refer to the respective topics in the Some Complex Booking Scenarios chapter on page 25.)

3.3.8. When finished, make sure the “F12 | DONE! Save Appointment” option is highlighted and save the appointment by pressing “Enter.” (See the picture above.)

(An alternative way to do this is to press F12 or to simply click the option).

This will close the Next Action panel and take you back to the Scheduler. The appointment is now available in the Scheduler.

Note: If having trouble fitting the appointment in the initial opening in the Scheduler (you will now because in this case KORVUE will pop up an error message when you attempt to save the appointment) or in case you want to suggest alternative booking times to the client, perform an Advanced Availability Search as a final step before saving the appointment. (For details, refer to “Booking Complex Appointments (Advanced Availability Searching)” on page 32.)

3.X. Adding the Guest's Name to the Appointment

The below instructions presume that you are in a booking procedure and have reached the point at which the Find Client dialog has been displayed.

Overview

In the Find Client dialog, **search for the guest's name and add it to the appointment**. If there is no record for the guest (new client), use the Quick Add option to create a file for her. Following are the exact steps how to do it.

Tip:

If the client record has been recently used, her name may be shown in the list of the most recently used client records on the right-hand side of the Find Client dialog. If this is the case, you don't have to do any searches: just click and highlight the client from the list and then click the Use Selected button. (Shortcut: double-clicking)

3.X.1. Search for the guest's client record.

3.X.1.1. Search by telephone number:

3.X.1.1.1. In the **Search Type ...** selection options, **make sure "Any of Client's Phone Numbers" is selected:**

3.X.1.1.2. In the search field, **type the client's 10 digit phone number** without spaces, hyphens, or brackets and press "Enter". If you can identify the client's record from the results (i.e. there is only one file for that name and phone number) proceed to step 3.X.1.1.5. (page 9).

3.X.1.1.3. (Conditional) If the **Include Inactive Clients** option has not been selected, check it and press "Enter" again to repeat the search. If you can verify the client's file from the results (i.e. there is only one file for that name and phone number) proceed to step 3.X.1.1.5. (page 9).

3.X.1.1.4. Ask the guest if she could recall any other phone number with which they might have been registered in the database, enter it, and repeat the search. If you cannot find the client record again, proceed to step 3.X.1.2. "Search by client name" (page 9).

3.X.1.1.5. **Click and highlight the client record** from the list **and then click the Use Selected button**. (Shortcut: double-clicking) This will add the client to the appointment. Proceed to the next step of the overall booking process given in the [overview](#) (Refer to "Booking Appointments Overview" for details, page 3.).

3.X.1.2. Search by client name (Nickname + Last Name):

3.X.1.2.1. **In the search field, highlight and copy the phone number** (use Ctrl+C) so you would not have to type it again if the client record is to be updated or created.

3.X.1.2.2. In the **Search Type ...** selection options, **select the Client's Last Name option**.

With larger databases, you may want to **clear the “Partial Match (slower)” box** to reduce the search results to a manageable number. (Take extra caution, however, to spell the whole name correctly.)

3.X.1.2.3. In the search field, **type the client’s last name** and press “Enter”.

If NO MATCHING RESULTS are found:

Create a new client record for the guest. (Step 3.X.2.2., page 12)

If THERE ARE MATCHING RESULTS:

The search results appear in the Find Client dialog:

Proceed to the next step (3.X.1.2.4).

3.X.1.2.4. If there are relatively few records in the results with the same nickname and last name as the guest (scroll down through the search results if necessary) and you can identify the guest’s client record among them (i.e. the guest can recognize either her phone number or email address), you have the following options:

UPDATE THE PHONE NUMBER
and then finalize the booking procedure

Click and highlight the client record from the list and then click the Update Selected button. This will open a form with the guest’s client record details for editing. Proceed to step 3.X.2.1. “Update the client record”.

POCEED WITH THE BOOKING PROCEDURE
without updating the phone number

Click and highlight the client record from the list and then click the Use Selected button. (Shortcut: double-clicking) This will add the client to the appointment. Proceed to the next step of the overall booking process given in the [overview](#) (Refer to “Booking Appointments Overview” for details, page 3.).

3.X.1.2.5. If the results are too many to be reasonably handled by simple scrolling and browsing, you can **search within them using the search field in the Find Client dialog:**

- 3.X.1.2.5.1. From the drop-down list just above the search field, make sure “Search by NICKNAME and then by LAST NAME” is selected:

The screenshot shows a search interface with a dropdown menu set to "Search by NICKNAME then LAST NAME...". To the right of the dropdown is a "new search" button. Below the dropdown is a search input field. To the right of the search field are four buttons: "Update Selected", "Select this Client", "Quick Add", and "Cancel and Return".

- 3.X.1.2.5.2. In the search field, start typing the guest’s nickname followed by the last name. (If the client doesn’t go by any special name (e.g. “Bob” for “Robert”), then the nickname and the first name are the same in the client record, so use the first name.) As you type, the matches found are highlighted in red in the results:

The screenshot shows a list of clients with the following columns: CLIENT # and NAME (nickname and last name). The results are: 45043 JULIE SMITH, 45016 LILLY SMITH (highlighted in red), and 45023 PITA SMITH. Below the list are two buttons: "F4 show all of today's clients" and "F5 show active". At the bottom is a search bar with the text "Search by NICKNAME then LAST NAME..." and the letters "Lil" entered.

- 3.X.1.2.5.3. If you can verify the client’s file from the matches (i.e. the guest can recognize either her phone number or email address), you have the following options:

**UPDATE THE PHONE NUMBER
and then finalize the booking procedure**

Click and highlight the client record from the list and then click the Update Selected button:

The screenshot shows two buttons: "Update Selected" and "Select this Client". Below them are two more buttons: "Quick Add" and "Cancel and Return". A mouse cursor is pointing at the "Update Selected" button.

This will open a form with client details for editing:

The screenshot shows a client details form for "LILLY SMITH". The form has two columns. The left column contains: Client's Nickname (LILLY), Client's First Name (LILLY), Client's Last Name (SMITH), Client's Birth Date (9/8/1978), Letter Salutation (Dear Lilly), Primary Address (254 EAST 100), INDIANAPOLIS, IN 46217. The right column contains: Primary Phone (Home, Mobile, Office), Home Phone (317) 852-3698, Mobile Phone (317) 456-9363, Work Phone (317) 852-4398, Fax, Primary Email, and Alternate Email. At the bottom are two buttons: "Save Changes" and "Cancel and Return".

Proceed to step 3.X.2.1. “Update the client record” (page 11).

**PROCEED WITH THE BOOKING PROCEDURE
without updating the phone number**

Click and highlight the client record from the list and then click the Select This Client button(Shortcut: double-clicking):

The screenshot shows two buttons: "Update Selected" and "Select this Client". Below them are two more buttons: "Quick Add" and "Cancel and Return". A mouse cursor is pointing at the "Select this Client" button.

This will add the client to the appointment. Proceed to the next step of the overall booking process given in the overview (Refer to “Booking Appointments Overview” for details, page 3.).

- 3.X.1.2.6. If no matches have been found, proceed by creating a new client record (step 3.X.2.2, page 12)

- 3.X.2. (Conditional) **Update or create the client record.** Choose either the “update” or the “create” step as necessary (3.X.2.1 or 3.X.2.2., respectively)

- 3.X.2.1. (Conditional) **Update the client record** (The client details form should be open for editing.)

- 3.X.2.1.1. **Update the phone field:**

If the field is blank:

If the field is NOT blank (old number):

- 3.X.2.1.1.1. **Click inside the field and then paste** the phone number (Ctrl+V).
- 3.X.2.1.1.2. **Format the phone number** appropriately by adding brackets, dashes, and spaces where necessary.
- 3.X.2.1.1.3. Press the Tab key to commit the changes made to the field.

- 3.X.2.1.1.1. Highlight the existing number (by dragging with the mouse) and then paste the new number (Ctrl+V).
- 3.X.2.1.1.2. **Format the phone number** appropriately by adding brackets, dashes, and spaces where necessary.
- 3.X.2.1.1.3. Press the Tab key to commit the changes made to the field.

3.X.2.1.2. (Conditional) **Update any other fields** as needed in the same manner.

3.X.2.1.3. When finished making changes, **click the Save Changes button**.

The client details form and the Find Client dialog close down. The client is now added to the appointment. Proceed to the next step of the overall booking process given in the [overview](#) (Refer to “Booking Appointments Overview” for details, page 3.).

3.X.2.2. (Conditional) **Create the client record:**

3.X.2.2.1. In the Find Client dialog, **click the Quick Add button**:

The Quick Add Client form appears:

3.X.2.2.2. (Conditional) **If the guest has a lead record, convert that lead record to client record:**

3.X.2.2.2.1. To start the procedure, **click the Convert Lead button**:



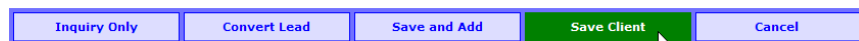
This will open the Find Lead dialog:

3.X.2.2.2. In the Find Lead dialog, **locate and select the lead you want to convert.** (The Find Lead dialog works similar to the Find Client dialog. For more detailed instructions, refer to KORVUE online help and to the other Verasoft user documentation.) Once this is done, the Find Lead dialog closes and you are taken back to the Quick Add Client form which is now filled with the data from the quest's lead record.

3.X.2.2.3. **Fill in as many of the fields of the Quick Add Client form as you can** and be sure to select the person's gender. (To go to a field you want to edit, either click in it with the mouse or navigate to it using the Tab and Shift+Tab keys.) When both the Client's First Name and the Client's Last Name have been entered, if there are other client records with the same first name and last name, KORVUE will prompt you to check for possible duplicates:

3.X.2.2.4. *(Conditional)* If the above prompt appears, click "No" because you have already done that search. (Otherwise, always chose to view the matching names to avoid creating duplicates.)

3.X.2.2.5. When finished entering data, click "Save Client":



(Conditional) Depending on your KORVUE system settings, KORVUE may prompt you to fill some fields that you have left blank or to select some option (like "Campaign") or to enter some additional information (like the client's account data).

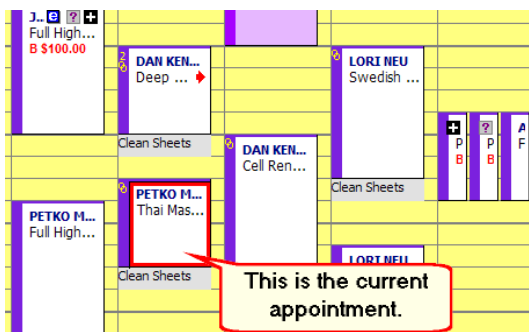
If any of the above-mentioned prompts appear, respond accordingly, after which click the Save Client button. If asked for the guest's referral information (i.e. how the guest was referred to your salon), respond according to instructions in the Entering Referral Information chapter.

The Quick Add Client form and the Find Client dialog close down. The client is added to the appointment. Proceed to the next step of the overall booking process given in the overview (Refer to "Booking Appointments Overview" for details, page 3.).

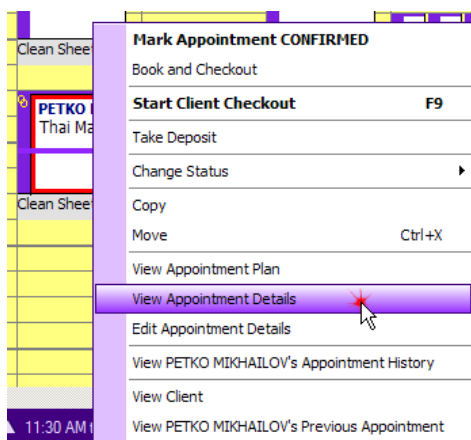
4. Verifying the Appointment

The things you need to check when verifying the appointment are **the client, the provider, the service, and the date and time of the appointment**. Here is how to do it:

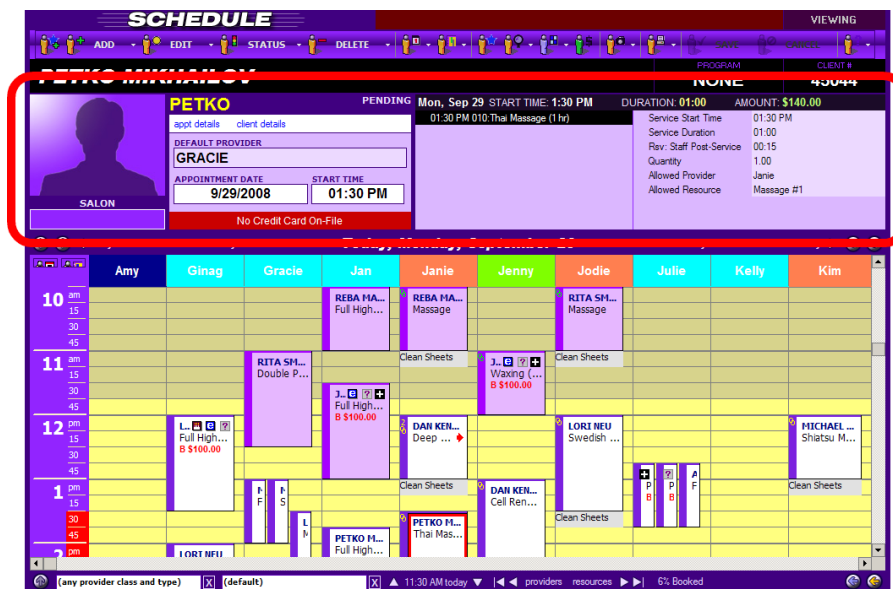
- 4.1. **Locate the appointment** in the Scheduler. If you have just booked the appointment and have not performed any other actions in KORVUE, the appointment should be selected by default which means there should be a red rectangular frame around it in the Scheduler. This should help you locate the appointment among the other appointments:



- 4.2. Right-click on the appointment and then, in the context menu that appears, click "View Appointment Details":



This will display the appointment details panel in the upper half of the Scheduler:



- 4.3. Verify the appointment details (client, provider, service, date and time).
- 4.4. Modify the appointment details if necessary and/or close the appointment details panel:

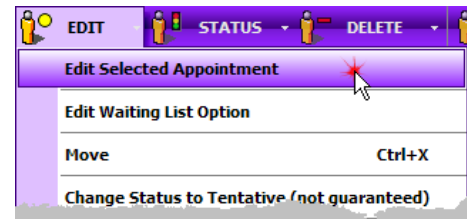
To close the appointment details panel
WITHOUT EDITING:

Click the upward arrowhead button on the utmost left of the date bar:



TO EDIT
the appointment details:

4.4.1. In the EDIT menu, click “Edit Selected Appointment”:



4.4.2. **Make changes** as necessary and then **save the appointment**. For details, refer to KORVUE online help and the other Verasoft user documentation.

MAKING MODIFICATIONS IN THE APPOINTMENT

The modifications in the appointment described in this chapter are done in the appointment details panel (the upper panel in red outline in the picture below) when the Next Action panel (the lower panel in red outline) is visible:

The screenshot shows the appointment details panel for a client named JAN. The panel is divided into several sections. The top section displays appointment details: PENDING, Mon, Jan 18, START TIME: 8:00 AM, DURATION: 02:00, AMOUNT: \$75.00. Below this, there are tabs for 'spot details' and 'client details'. The 'spot details' tab is active, showing a list of services: 08:00 AM ACR Acrylic Fill (1 hr), 09:00 AM BW Brow Waxing (15 min), Service Gap, and 09:30 AM BC Brow Color (30 min). The 'client details' tab shows the client's name, JAN, and the appointment date, 1/18/2010, with a start time of 08:00 AM. The 'Next Action' panel is visible, showing a list of actions: F2 | Add a Service, F3 | Add a Service Gap, F4 | Add a Package / Combo, F5 | Add a Product, F6 | Appointment Comment, F7 | Setup Recurrence, F8 | Advanced Availability Search, and F12 | DONE! Save Appointment. The 'Recent Appts.' panel is also visible, showing a list of recent appointments.

The modifications can be made when either Advanced-Booking a new appointment or when modifying an existing one. Most of these modifications are done by choosing a specific option from a right-click menu. If, when modifying an existing appointment, this option is either unavailable or disabled, this means that either the opened appointment is not in EDITING mode (and you must click the EDIT button in the toolbar) or you are simply right-clicking on the wrong place. If, when Advanced-Booking a new appointment, no context menu opens at right-click, then a service has not been properly added to the appointment yet (You need to add the service and make sure the Next Action panel is displayed.).

The proper way of accessing the appointment details panel for making modifications it is given in the table below. Be sure to ACCESS THE PANEL AS DESCRIBED FIRST AND THEN DO THE SPECIFIC MODIFICATIONS described in the topics that follow.

To access the appointment details panel and enable making changes in it:

If Advanced Booking an Appointment:

Make sure **the service you want to modify has been successfully added to the appointment** first and the Next Action panel is displayed.

(For details on Advanced Booking, refer to “3. The Booking Procedure” on page 5, the Advanced Booking column.)

If Modifying an Existing Appointment:

Open the appointment it for editing:

In the Scheduler, **double-click the appointment to open it, and then click the EDIT button** on the toolbar.

This will switch the appointment to EDITING mode.

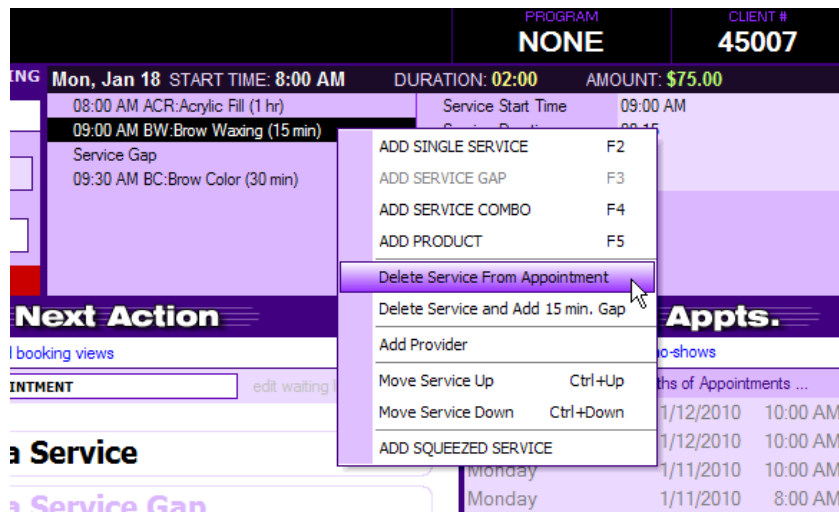
From here, proceed as described in the individual topics below.

Deleting a Service

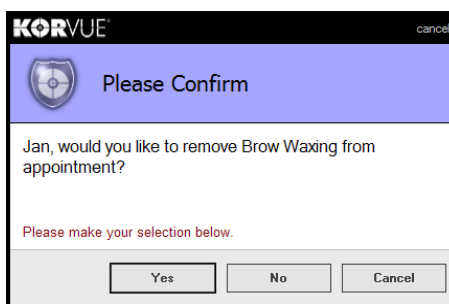
Deleting a service is done by selecting the option from a right-click menu.

To delete a service:

1. In the appointment details panel, in the list of the appointment services, **right-click the service you want to delete** and from the context menu that appears, **select “Delete Service from Appointment.”**



KORVUE will pop up a warning message, asking you to confirm the deletion:



2. Click **"Yes"** to delete the service. (Clicking either the "No" or the "Cancel" button will just close the warning message and no changes will be made to the appointment.)
3. From here, proceed as necessary by selecting the appropriate option in the Next Action panel.

Tips:

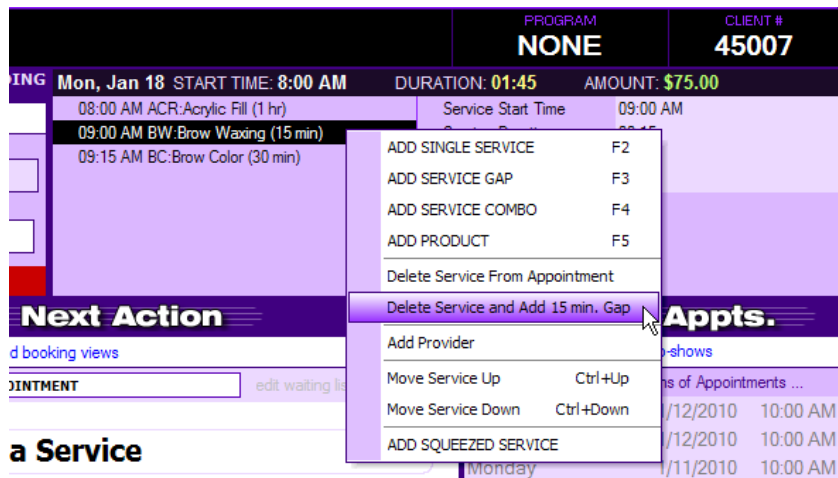
1. Service gaps are deleted in the same way as services: just right-click the gap you want to delete and from the context menu that appears, select "Delete Gap from Appointment."
2. If you need to delete a service that has other services before and after it in the appointment and leave the start times of the "after" services unchanged, you have to add a service gap of the same length in the place of the deleted service. Fortunately, KORVUE enables you to do all that in just one pass with its "Delete Service and Add Gap" feature. For details, refer to the Replacing a Service with a Gap topic below.

Replacing a Service with a Gap

Replacing a service with a service gap is possible only for services that have other services before and after them in the appointment. By default, the length of the added gap is the same as the length of the service it has replaced, but you can change the gap duration, if necessary. Replacing a service with a gap in KORVUE is one-step procedure and is done with a special right-click menu option.

To replace a service with a service gap:

1. In the appointment details panel, in the list of the appointment services, **right-click the service you want to replace with a gap and** from the context menu that appears, **select "Delete Service and Add XX min. Gap"** (In your context menu option, instead of "XX" there will be the actual number of minutes of the service you are deleting.):

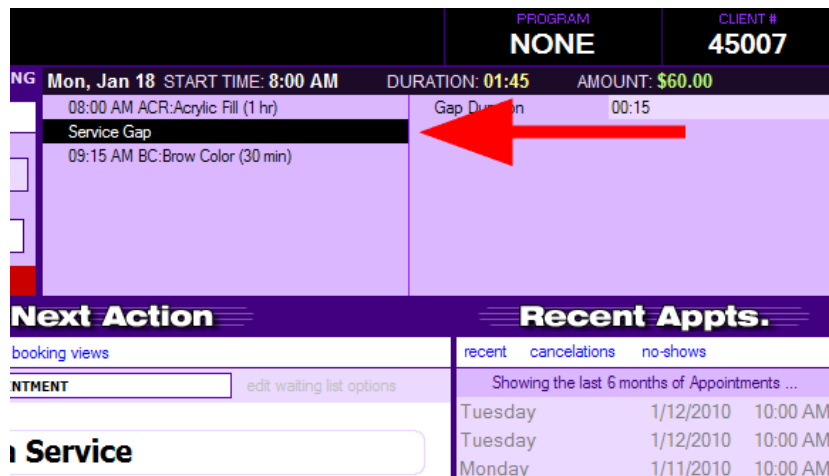


KORVUE will pop up a warning message, asking you for confirmation:



2. **Click “Yes”** to replace the service. (Clicking the “Cancel” button will just close the warning message and no changes will be made to the appointment.)

The service is now replaced with a gap with the same duration:



3. *(Optional)* Change the duration of the gap:
 - 3.1. Click and highlight the Gap Duration field in the service details panel:

		PROGRAM	CLIENT #
		NONE	45007
Mon, Jan 18 START TIME: 8:00 AM		DURATION: 01:45	AMOUNT: \$60.00
08:00 AM ACR:Acrylic Fill (1 hr)	Gap Duration	00:15	
Service Gap			
09:15 AM BC:Brow Color (30 min)			
Next Action		Recent Appts.	
booking views <input type="text" value="APPOINTMENT"/> edit waiting list options		recent cancellations no-shows Showing the last 6 months of Appointments ...	
Service		Tuesday 1/12/2010 10:00 AM Tuesday 1/12/2010 10:00 AM Monday 1/11/2010 10:00 AM	

- 3.2. In the Gap Duration field, drag to highlight the numbers and modify them as necessary by typing the new values (The minutes and the hours are modified separately.).

Note:

For the minutes, the values must be multiples of the grid cell duration in the Scheduler. (That is, the number of minutes you enter must be divisible by the length of the individual time cell in the Scheduler, which is 15 minutes by default.)

For example, if each cell in the Scheduler represents 15 minutes, then the allowed values for minutes would be 15, 30, 45, and, of course, 00. If it is 10 minutes, then the values would be 00, 10, 20, 30, 40, and 50.

- 3.3. **Apply the new duration:**

To apply the new duration, just **click anywhere outside the Gap Duration field** but within either the list of services panel or service details panel (that is, within the red outline in the picture below):

		PROGRAM	CLIENT #
		NONE	45007
Mon, Jan 18 START TIME: 8:00 AM		DURATION: 01:45	AMOUNT: \$60.00
08:00 AM ACR:Acrylic Fill (1 hr)	Gap Duration	00:30	
Service Gap			
09:30 AM BC:Brow Color (30 min)			
Next Action		Recent Appts.	
booking views <input type="text" value="APPOINTMENT"/> edit waiting list options		recent cancellations no-shows Showing the last 6 months of Appointments ...	
a Service		Tuesday 1/12/2010 10:00 AM Tuesday 1/12/2010 10:00 AM Monday 1/11/2010 10:00 AM	

4. From here, proceed as necessary by selecting the appropriate option in the Next Action panel.

Adjusting the Start Time of a Service

The start time of a service can be adjusted (changed) by changing the values in the Service Start Time field.

To adjust (change) the starting time of a service:

1. **Select the service:**

In the appointment details panel, in the list of appointment services, **click and highlight the service** whose start time you want to change:

		PROGRAM NONE	CLIENT # 45007
ING	Mon, Jan 18 START TIME: 8:00 AM	DURATION: 02:00	AMOUNT: \$60.00
08:00 AM ACR:Acrylic Fill (1 hr) Service Gap 09:30 AM BC:Brow Color (30 min)		Service Start Time 08:00 AM Service Duration 01:00 Quantity 1.00 Allowed Provider Jan	
Next Action		Recent Appts.	
d booking views <input type="text"/> edit waiting list options		recent cancelations no-shows Showing the last 6 months of Appointments ...	
a Service		Tuesday 1/12/2010 10:00 AM Tuesday 1/12/2010 10:00 AM Monday 1/11/2010 10:00 AM	

The details for the highlighted service will appear in the service details panel:

		PROGRAM NONE	CLIENT # 45007
ING	Mon, Jan 18 START TIME: 8:00 AM	DURATION: 02:00	AMOUNT: \$60.00
08:00 AM ACR:Acrylic Fill (1 hr) Service Gap 09:30 AM BC:Brow Color (30 min)		Service Start Time 08:00 AM Service Duration 01:00 Quantity 1.00 Allowed Provider Jan	
Next Action		Recent Appts.	
d booking views <input type="text"/> edit waiting list options		recent cancelations no-shows Showing the last 6 months of Appointments ...	
a Service		Tuesday 1/12/2010 10:00 AM Tuesday 1/12/2010 10:00 AM Monday 1/11/2010 10:00 AM	

2. Modify the start time:

2.1. In the service details panel, click and highlight the Service Start Time field:

		PROGRAM NONE	CLIENT # 45007
ING	Mon, Jan 18 START TIME: 8:00 AM	DURATION: 01:45	AMOUNT: \$60.00
08:00 AM ACR:Acrylic Fill (1 hr) Service Gap 09:15 AM BC:Brow Color (30 min)		Service Start Time 08:00 AM Service Duration 01:00 Quantity 1.00 Allowed Provider Jan	
Next Action		Recent Appts.	
d booking views <input type="text"/> edit waiting list options		recent cancelations no-shows Showing the last 6 months of Appointments ...	
a Service		Monday 1/18/2010 8:00 AM Monday 1/18/2010 8:00 AM Tuesday 1/12/2010 10:00 AM	

2.2. In the Service Start Time field, **drag to highlight the numbers and modify them** as necessary by typing the new values (The minutes and the hours are modified separately.).

Note:

For the minutes, the values must be multiples of the grid cell duration in the Scheduler. (That is, the number of minutes you enter must be divisible by the length of the individual time cell in the Scheduler, which is 15 minutes by default.)

For example, if each cell in the Scheduler represents 15 minutes, then the allowed values for minutes would be 15, 30, 45, and, of course, 00. If it is 10 minutes, then the values would be 00, 10, 20, 30, 40, and 50.

3. Apply the new start time:

Press the Enter key.

4. From here, proceed as necessary by selecting the appropriate option in the Next Action panel.

Note:

1. When there are many services in an appointment, and you change the starting time for one of the services, KORVUE automatically adjusts the starting times of the other services.
2. When you have modified the start time for the first service in the appointment, KORVUE automatically adjusts the starting time of the appointment in the Scheduler.

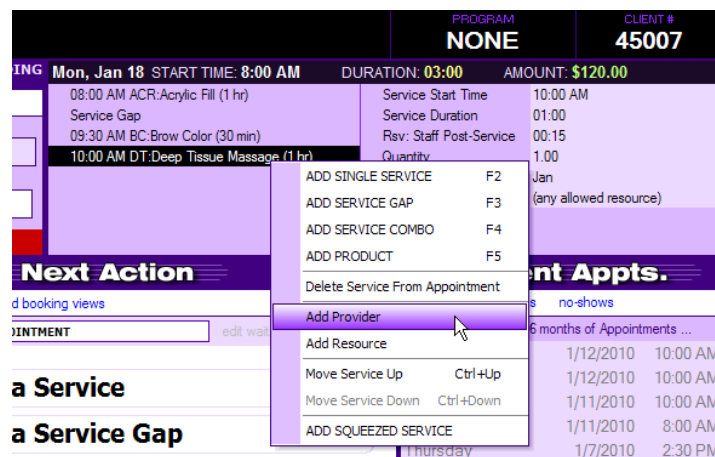
Adding Additional Providers

Additional providers are added with the Add Provider right-click menu option. It creates, in the service details panel, one more Allowed Provider field; the field has a drop-down list from which you chose the additional provider.

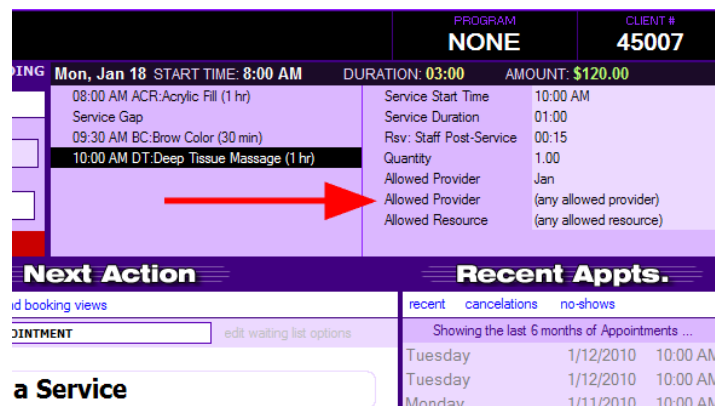
To add an additional provider to a service:

1. Select the service and add one more Allowed Provider field:

In the appointment details panel, in the list of appointment services, **right-click the service** and from the context menu that appears, **select “Add Provider”**:



The details for the highlighted service appear in the service details panel and a second Allowed Provider field appears just beneath the existing one:



2. Select and add the additional provider:

2.1. Click the Allowed Provider field TWO TIMES.

The first click will highlight the field and the second field will open a drop-down list with the available providers to choose from:

The screenshot shows the appointment details panel for a service on Monday, Jan 18, starting at 8:00 AM. The service is "DT:Deep Tissue Massage (1 hr)". The "Allowed Provider" field is highlighted, and a drop-down list is open, showing options: "Jan", "(any allowed provider)", "(any allowed provider)", and "(any MASSAGE SERVICES type)". The "Next Action" panel is visible at the bottom, showing "a Service" and "a Service Gap".

2.2. From the drop-down list, click and select the provider you want to add.

2.3. Press the Enter key to apply your choice.

3. (Optional) Add another additional provider:

To add one more additional provider, right-click anywhere within the service details panel to open the context menu and then repeat step 2.

4. From here, proceed as necessary by selecting the appropriate option in the Next Action panel.

Adding Additional Resources

Additional resources are added with the Add Resource right-click menu option; it creates, in the service details panel, one more Allowed Resource field with a drop-down list from which you chose the additional resource. The Add Resource option is available in the right-click menu only for services that have been set up to use, by default, at least one (primary) resource or type of resource (This setting is done in KORVUE Admin.).

To add an additional resource to a service:

1. Select the service and add one more Allowed Resource field:

In the appointment details panel, in the list of appointment services, **right-click the service** and from the context menu that appears, **select "Add Resource"**:

The screenshot shows the appointment details panel for a service on Monday, Jan 18, starting at 8:00 AM. The service is "DT:Deep Tissue Massage (1 hr)". The "Allowed Resource" field is highlighted, and a context menu is open, showing options: "ADD SINGLE SERVICE", "ADD SERVICE GAP", "ADD SERVICE COMBO", "ADD PRODUCT", "Delete Service From Appointment", "Add Provider", "Add Resource", "Move Service Up", "Move Service Down", and "ADD SQUEEZED SERVICE". The "Add Resource" option is selected. The "Next Action" panel is visible at the bottom, showing "a Service" and "a Service Gap".

The details for the highlighted service appear in the service details panel and a second Allowed Resource field appears just beneath the existing one:

2. Select and add the additional resource:

2.1. Click the Allowed Resource field TWO TIMES.

The first click will highlight the field and the second field will open a drop-down list with the available resources to choose from:

2.2. From the drop-down list, **click and select the resource** you want to add.

2.3. Press the Enter key to apply your choice.

3. (Optional) Add another additional resource:

To add one more additional resource, right-click anywhere within the service details panel to open the context menu and then repeat step 2.

4. From here, proceed as necessary by selecting the appropriate option in the Next Action panel.

Re-Arranging Services

To change the order of the services in an appointment, **select a service** in the list of the appointment services **and then use the Ctrl+Up and Ctrl+Down keyboard shortcuts.**

An alternative way is to right-click the appointment you want to move and then, from the context menu that appears, select either Move Service Up or Down Move Service option:

		PROGRAM	CLIENT #
		NONE	45007
ING Mon, Jan 18 START TIME: 8:00 AM		DURATION: 03:00	AMOUNT: \$135.00
08:00 AM ACR:Acrylic Fill (1 hr)	Service Start Time	09:30 AM	
09:00 AM BW:Brow Waxing (15 min)	Service Duration	00:30	
Service Gap	Quantity	1.00	
09:30 AM BC:Brow Color (30 min)	ADD SINGLE SERVICE	F2	
10:00 AM DT:Deep Tissue Massage (1 hr)	ADD SERVICE GAP	F3	
	ADD SERVICE COMBO	F4	
	ADD PRODUCT	F5	
Next Action		Delete Service From Appointment	
d booking views		Delete Service and Add 30 min. Gap	
APPOINTMENT		ppts.	
edit waiting list		6 Appointments ...	
		Move Service Up	Ctrl+Up
		Move Service Down	Ctrl+Down
a Service		2/10/10	10:00 AM
a Service Gap		2/10/10	10:00 AM
		1/10/10	10:00 AM
		1/20/10	8:00 AM

Adding Duration Exceptions

Every service service in KORVUE has a preset duration which is applied automatically to the appointment when the service is being booked. Occasionally you will need to change that duration when circumstances require that, for example, a trainee provider may need longer time to do a service, a client may have unusually long hair or request an unusually complex hairstyle.

You can change the appointment duration at booking time for appointments that are being either FastBooked or Advanced-Booked, albeit the way it is done is somewhat different for each. If Insta-booking, you need to save the appointment first and then open it in EDITING mode to change the service duration (see the “Modifying an Existing Appointment” column in the table below); in EDITING mode, you can change the services’ durations of any appointment, no matter what the booking procedure has been.

To change the duration of a service when

Insta-Booking / Modifying an Appointment:

1. *(Conditional)* If Insta-Booking an appointment, **complete the booking procedure by saving the appointment.**

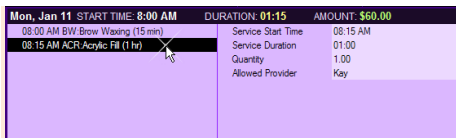
(For details on the Insta-Booking procedure, refer to “3. The Booking Procedure” on page 5.)

2. **Open the appointment it for editing:**

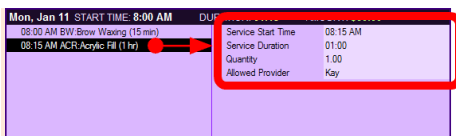
In the Scheduler, **double-click the appointment to open it, and then click the EDIT button** on the toolbar.

This will switch the appointment to EDITING mode.

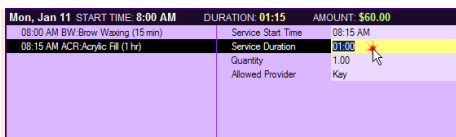
3. *(Conditional)* If there is more than one service listed for the appointment, **click and highlight the service** the duration of which you want to change:



The service details are now displayed in the top-right panel:



4. **Click the Service Duration field:**



This will highlight the field and allow for changing the number in it.

5. In the Service Duration field, **drag to**

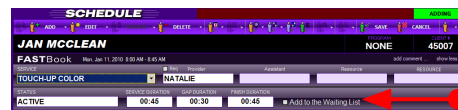
FastBooking:

1. **Start the FastBooking procedure**, add service, and then, if necessary, change the provider and the resource. DO NOT SAVE the appointment. (See the FastBooking procedure in chapter “3. The Booking Procedure” on page 5, FastBooking column, steps 3.1.÷3.3.2..)

2. **Click the “show more” link** on the utmost-right of the info bar:



This will display an additional details row beneath the existing one:



3. **Change the service duration:**

3.1. In the additional details row, click and highlight the SERVICE DURATION field:



3.2. Using your keyboard, clear the existing number and type in the new duration.

Tip: Another way to change the numbers in the SERVICE DURATION field is to use the spin buttons at the right boarder of the field.

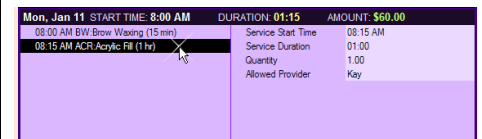
Note: For the minutes, the values must be multiples of the grid cell duration in the Scheduler. (That is, the number of minutes you enter must be divisible by

Advanced Booking:

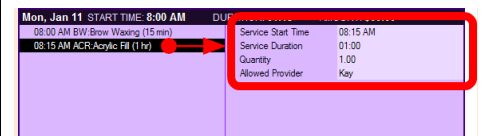
1. **Start the Advanced-Booking procedure**, add the service, and return to the Next Action panel.

(For details on how to Advanced-Book a service, refer to “3. The Booking Procedure” on page 5, Advanced Booking column, steps 3.1.÷3.3.6..)

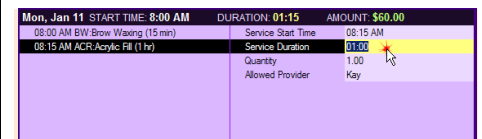
2. *(Conditional)* If there is more than one service listed for the appointment, **click and highlight the service** the duration of which you want to change:



The service details are now displayed in the top-right panel:



3. **Click the Service Duration field:**



This will highlight the field and allow for changing the number in it.

4. In the Service Duration field, **drag to highlight the numbers and modify them** as necessary by typing the new values.

Note: For the minutes, the values must be multiples of the grid cell duration in the Scheduler. (That is, the number of minutes you enter must be divisible by

highlight the numbers and modify them as necessary by typing the new values (The minutes and the hours are modified separately.).

Note: For the minutes, the values must be multiples of the grid cell duration in the Scheduler. (That is, the number of minutes you enter must be divisible by the length of the individual time cell in the Scheduler, which is 15 minutes by default.)

For example, if each cell in the Scheduler represents 15 minutes, then the allowed values for minutes would be 15, 30, 45, and, of course, 00. If it is 10 minutes, then the values would be 00, 10, 20, 30, 40, and 50. **End of Note**

6. Press the Enter key.

The highlight now moves to the next (downward) field. The Service Duration field should now show the new value. (If it doesn't, this means that the value you have entered has not been accepted; if this is the case, repeat steps 4÷5; please pay attention to the Note in step 5)

7. Save the appointment by clicking the SAVE button on the toolbar.

This will close the appointment and take you back to the Scheduler.

the length of the individual time cell in the Scheduler, which is 15 minutes by default.)

For example, if each cell in the Scheduler represents 15 minutes, then the allowed values for minutes would be 15, 30, 45, and, of course, 00. If it is 10 minutes, then the values would be 00, 10, 20, 30, 40, and 50. **End of Note**

4. Save the appointment by clicking the SAVE button on the toolbar.

the length of the individual time cell in the Scheduler, which is 15 minutes by default.)

For example, if each cell in the Scheduler represents 15 minutes, then the allowed values for minutes would be 15, 30, 45, and, of course, 00. If it is 10 minutes, then the values would be 00, 10, 20, 30, 40, and 50. **End of Note**

5. Press the Enter key.

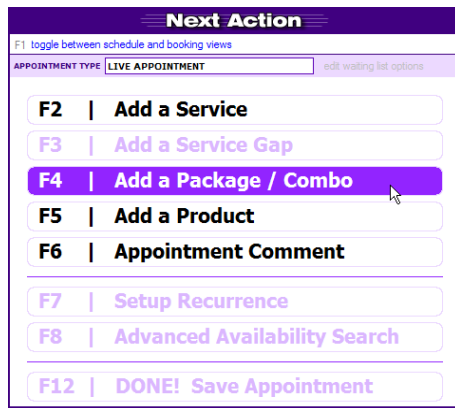
The highlight now moves to the next (downward) field. The Service Duration field should now show the new value. (If it doesn't, this means that the value you have entered has not been accepted; if this is the case, repeat steps 3÷4; please pay attention to the Note in step 5)

6. (Optional) Proceed with adding other services, service gaps, products, or comments to the appointment as necessary. (For details on these and some other more advanced booking scenarios, refer to the respective topics in the Some Complex Booking Scenarios chapter on page 25.)

7. When finished, make click the "F12 | DONE! Save Appointment" option to save the appointment.

Booking Service Combos

To book service combos, use the Advanced Booking procedure. The booking procedure is basically the same as the one for booking services (see the Advanced Booking procedure in the "3. The Booking Procedure" chapter on page 5), the only difference being that in the Next Action panel you select the "F4 | Add a Package / Combo" option:



This will open the Add Service Combo panel:

Add Service Combo

Facial with Women's Shampoo Style 003

Combo Code	<input type="checkbox"/> Req	Provider	<input type="checkbox"/> Req	Assistant	<input type="checkbox"/> Req	Resource	Representative	Combo Retail	✓ + F2
------------	------------------------------	----------	------------------------------	-----------	------------------------------	----------	----------------	--------------	--------------

F3 all packages F7 recent packages F8 combos

INCLUDED SERVICES & PRODUCTS... Signature Facial, Shampoo & Style

CODE	COMBO NAME	COMBO CATEGORY	AMOUNT	DURATION
003	Facial with Women's Shampoo Style	SPA	\$90.00	01:15
002	Massage with Men's Cut	HAIR-MASSAGE	\$90.00	02:00
001	Women's Cut w/Mani-Pedi	HAIR-NAILS	\$135.00	02:00

SEARCH BY COMBO NAME... Locate by COMBO NAME - F9 ☐ by COMBO CATEGORY ☐ by AMOUNT ☐

The the Add Service Combo panel looks the same and works the same as the Add Service panel so you proceed in it the same way in which you do when adding services. Here is an overview of the steps involved in booking an appointment with a service combo:

1. Locate an appropriate time slot. (See page 4 for details.)
2. Start the Advanced Booking procedure by **selecting a time slot and pressing F3**.
3. In the Next Action panel **select the “F4 | Add a Package / Combo” option** (or just press F4) to access the Add Service Combo panel. (See the two pictures above.)
4. In the Add Service Combo panel, **proceed as with adding an appointment** (For more details refer to the “3. The Booking Procedure” chapter on page 5):
 - 4.1. Find and select the combo. (Search in the “Locate by COMBO NAME – F9” field.)
 - 4.2. *(Optional)* Change the provider and modify the other fields as necessary.
 - 4.3. Save and return to the Next Action panel. (Or press F2 to add another combo and then repeat steps 4.1.÷4.3.)
 - 4.4. In the Next Action panel, select additional options if necessary and then save the appointment (“F12 | DONE! Save Appointment” option).

Booking Packages

To book service packages, use the Advanced Booking procedure. The booking procedure is basically the same as the one for booking combos (see “Booking Packages” on page 27) with one extra step in which you switch the panel from “Add Service Combo” to “Add Package” by pressing F3 or clicking the “all packages” option:

Add Service Combo

Facial with Women's Shampoo Style 003

Combo Code	<input type="checkbox"/> Req	Provider	<input type="checkbox"/> Req	Assistant	<input type="checkbox"/> Req	Resource	Representative	Combo Retail	✓ + F2
------------	------------------------------	----------	------------------------------	-----------	------------------------------	----------	----------------	--------------	--------------

F3 all packages F7 recent packages F8 combos

INCLUDED SERVICES & PRODUCTS... Signature Facial, Shampoo & Style

CODE	COMBO NAME	COMBO CATEGORY	AMOUNT	DURATION
003	Facial with Women's Shampoo Style	SPA	\$90.00	01:15
002	Massage with Men's Cut	HAIR-MASSAGE	\$90.00	02:00
001	Women's Cut w/Mani-Pedi	HAIR-NAILS	\$135.00	02:00

SEARCH BY COMBO NAME... Locate by COMBO NAME - F9 ☐ by COMBO CATEGORY ☐ by AMOUNT ☐

This opens the Add Package panel:

Add Package

Women's Cut by 5 get 1 free 180

Package Code	Retail Price	Representative	
			F2

F3 all packages F7 recent packages F8 combos

CODE	PACKAGE NAME	CATEGORY	RETAIL	PACKAGE ITEMS	QTY
001	Women's Cut by 5 get 1 free	HAIR	\$180.00	Women's Cut	5
002	Men's Cut Buy 5 get 1 free	HAIR	\$180.00		
003	Child Cut Buy 5 get 1 free	HAIR	\$180.00		
004	Women's Cut & Style Buy 5 get 1 free	HAIR	\$225.00		
005	Men's Cut and Style Buy 5 get 1 free	HAIR	\$225.00		
006	Treatment Buy 5 get 2 free	HAIR	\$150.00		
007	Perm Buy 8 and get 2 free	TEXTURE	\$360.00		
008	Straightener Buy 5 get 1 free	TEXTURE	\$450.00		
009	Relaxer Buy 5 get 1 free	TEXTURE	\$350.00		
010	Full Color Buy 9 Get 1 free	COLOR	\$405.00		

SEARCH BY CODE... Filter by NAME - F9 by CATEGORY by ITEM NAME

The the Add Package panel looks the same and works in a similar manner as the Add Service combo panel so you proceed in it a similar way as with adding combos. Following is an overview of the steps involved in booking a package after which a detailed explanation on how to work in the Add Package screen is provided.

1. Locate an appropriate time slot. (See page 4 for details.)
2. Start the Advanced Booking procedure by **selecting a time slot and pressing F3**.
3. In the Next Action panel **select the "F4 | Add a Package / Combo" option** (or just press F4) to access the Add Service Combo panel.
4. In the Add Service Combo panel, either press F3 or click the "all packages" option (see the picture above) to access the Add Package panel.
5. In the Add Package panel, **proceed as with adding a combo** (For more details refer to "5. Using the Add Package Panel" below):
 - 5.1. Find and select the package. (Search in the Package Code field.)
 - 5.2. Confirm the choice of representative, the quantity of the items, and the provider.
 - 5.3. Save and return to the Next Action panel.
 - 5.4. In the Next Action panel, select additional options if necessary and then save the appointment ("F12 | DONE! Save Appointment" option).

5. Using the Add Package Panel

5.1. Finding and and selecting the package.

- 5.1.1. Locate the package in the listing by typing its code in the Package Code field. Note that as you type, the code of the first matching package is highlighted. Once you have typed the full code, you will have a unique match and the highlighted package will be the correct one:

Add Package

Day at the Spa

Package Code	Retail Price	Representative	
02			F2

F3 all packages F7 recent packages F8 combos

CODE	PACKAGE NAME	CATEGORY	RETAIL
008	Straightener Buy 5 get 1 free	TEXTURE	\$450.00
009	Relaxer Buy 5 get 1 free	TEXTURE	\$350.00
010	Full Color Buy 9 Get 1 free	COLOR	\$405.00
011	Partial Foil Buy 6 get 1 free	COLOR	\$270.00
012	Full Foil Buy 9 get 1 free	COLOR	\$405.00
013	Dimensional Color 9 get 1 free	COLOR	\$45.00
014	Manicure Buy 5 get 1 free	NAILS	\$150.00
015	Pedicure Buy 5 get 1 free	NAILS	\$225.00
020	Day at the Spa	MULTI SERVICE	\$560.00

Tip:

If you don't know the package code, you can search by package name, category, or item name using the search fields at the bottom of the Add Package panel.

- 5.1.2. Press the Enter key. This will insert the package details into the fields above the packages listing with the default representative for the package listed in the Representative field. The Representative field is also highlighted, meaning that you can change the representative if you want to:

CODE	PACKAGE NAME	CATEGORY	RETAIL	PACKAGE ITEMS	QTY
008	Straightener Buy 5 get 1 free	TEXTURE	\$450.00	Deep Tissue Massage	1
009	Relaxer Buy 5 get 1 free	TEXTURE	\$350.00	Spa Manicure	1
010	Full Color Buy 9 Get 1 free	COLOR	\$405.00	Spa Pedicure	1
011	Partial Foil Buy 6 get 1 free	COLOR	\$270.00	Brow Waxing	1
012	Full Foil Buy 9 get 1 free	COLOR	\$405.00	Signature Facial	1
013	Dimensional Color 9 get 1 free	COLOR	\$45.00	Make-up Application	1
014	Manicure Buy 5 get 1 free	NAILS	\$150.00	Women's Cut & Style	1
015	Pedicure Buy 5 get 1 free	NAILS	\$225.00		
020	Day at the Spa	MULTI SERVICE	\$560.00		

In addition to that, the package is added to the list of packages for the appointment:

CODE	SERVICE NAME	SERVICE CATEGORY	AMOUNT	DURATION
BRW	Brazilian Waxing	WAXING	\$45.00	01:00
BC	Brow Color	LASH & BROW	\$15.00	00:30
BW	Brow Waxing	WAXING	\$15.00	00:15

5.2. Confirming the choice of representative, the quantity of the items, and the provider.

- 5.2.1. Confirming the representative.

Change the representative, if necessary, by selecting another one from the drop-down list (you can type the first letter of the name for faster navigation), and then confirm the chosen representative by pressing "Enter."

This will change the Add Package panel to displaying the details and the items for the selected package:

Add Package							
Req	Provider	Req	Assistant	Req	Resource	Representative	
	JAN						
PACKAGE ITEM TYPE	PACKAGE ITEM NAME				CATEGORY	QTY	QTY TO BOOK
SERVICE	Women's Cut & Style				HAIR	1	1
SERVICE	Spa Manicure				NAILS	1	1
SERVICE	Spa Pedicure				NAILS	1	1
SERVICE	Make-up Application				MAKE-UP	1	1
SERVICE	Signature Facial				SKIN CARE	1	1
SERVICE	Deep Tissue Massage				MASSAGE	1	1
SERVICE	Bikini Waxing				WAXING	1	1

5.2.2. (Optional) Changing the quantities for the items in the package.

- 5.2.2.1. If you want to change the quantity of one or more of the items in the package, in the items table, click the respective QTY TO BOOK field, and then modify the number in it by typing the new number in it.

Note:

1. To remove an item from the package, type 0.
2. The QTY TO BOOK fields allow you to enter only valid numbers. For example, for an item that doesn't make sense if added to a package more than once (like the Spa Manicure item in a Day in a Spa package), you can enter either 0 or 1.

Tip:

Another way to change the numbers in the QTY TO BOOK fields is to use the spin buttons on the right boarder of the field.

- 5.2.2.2. Confirm the change by pressing the Enter key.

- 5.2.2.3. If there are more than one items in the package, repeat for every item you the quantity of which want to change.

5.2.3. Confirming the provider.

- 5.2.3.1. Press the Tab key. The highlight now moves to the Provider field (If not, just click it.):

Add Package							
Req	Provider	Req	Assistant	Req	Resource	Representative	
	JAN						
PACKAGE ITEM TYPE	PACKAGE ITEM NAME				CATEGORY	QTY	QTY TO BOOK
SERVICE	Women's Cut & Style				HAIR	1	1
SERVICE	Spa Manicure				NAILS	1	1
SERVICE	Spa Pedicure				NAILS	1	1
SERVICE	Make-up Application				MAKE-UP	1	1
SERVICE	Signature Facial				SKIN CARE	1	1
SERVICE	Deep Tissue Massage				MASSAGE	1	1
SERVICE	Bikini Waxing				WAXING	1	1

- 5.2.3.2. (Optional) Change the provider, if necessary, by selecting another one from the drop-down list (you can also type the first letter(s) of the name for faster navigation and then press "Enter").

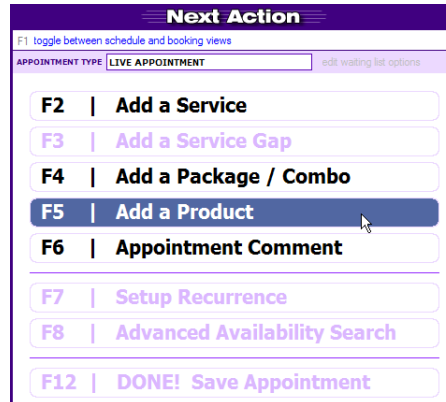
5.3. Saving the package to the appointment and returning to the Next Action panel.

With the Provider field highlighted, press the Enter key. This will save the package to the appointment and take you back to the Next Action panel.

Reserving Products within the Appointment

Products can be reserved (added) to appointments either during the booking procedure (Advanced Booking only) procedure or when the appointment have been switched to Editing mode. Products cannot be added to appointments that have been booked with the Insta-Book procedure.

Products are added to appointments in the same way in which services are added with the Advanced-Booking procedure (see Advanced Booking in the “3. The Booking Procedure” chapter on page 5), the only difference being that in the Next Action panel you select the “F5 | Add a Product” option:



The 'Next Action' panel is a vertical list of buttons. At the top, it says 'F1 toggle between schedule and booking views'. Below that is a tab for 'LIVE APPOINTMENT' with a link to 'edit waiting list options'. The main list of buttons includes: 'F2 | Add a Service', 'F3 | Add a Service Gap', 'F4 | Add a Package / Combo', 'F5 | Add a Product' (which is highlighted with a mouse cursor), 'F6 | Appointment Comment', 'F7 | Setup Recurrence', 'F8 | Advanced Availability Search', and 'F12 | DONE! Save Appointment'.

This will open the Add Product panel:



The 'Add Product' panel shows a table of products. The top row is for 'Calm Conditioner' with a price of '\$55.50'. Below this is a table with columns: CODE, NAME, CATEGORY, and RETAIL. The table lists several hair care products. The 'Calm Conditioner' row is highlighted. At the bottom, there are search fields: 'SEARCH BY NAME...', 'Locate by NAME - F9', and 'by CATEGORY'.

CODE	NAME	CATEGORY	RETAIL
7324892740919	Hydrate Shampoo 10.1oz	HAIR CARE	\$26.00
73248927409000	InCharge Flexible Styling Spray	HAIR CARE	\$51.00
732489274090090	Instant Repair 8.5oz	HAIR CARE	\$23.50
732489274090975	NanoGlaze Hair Creme	HAIR CARE	\$47.50
98859388223	NanoWax MoldableHair Texture	HAIR CARE	\$48.00
9885938822589	Purify Shampoo 10.1 oz	HAIR CARE	\$44.00
9885938822	Reconstructive Repair 8.5 oz	HAIR CARE	\$25.50
9589039485490	Blofoam 8.8 oz	HAIR CARE	\$30.75
9589039485491	Calm Conditioner	HAIR CARE	\$55.50

The the Add Product panel looks the same and works the same as the Add Service panel so you proceed in it the same way in which you do when adding services:

1. **Locate the service** in the listing by typing its name in the “Locate by NAME – F9”.
2. Once you have found the service in the list, **make sure it is selected (highlighted) and then press the Enter key.**

This will add the service details to the fields above the services listing and the Qty field will be highlighted:



The 'Add Product' panel now shows the details of the selected product. The top row is for 'Calm Conditioner' with a price of '\$55.50'. Below this is a table with columns: CODE, NAME, CATEGORY, and RETAIL. The 'Calm Conditioner' row is highlighted. At the bottom, there are search fields: 'SEARCH BY NAME...', 'Locate by NAME - F9', and 'by CATEGORY'.

CODE	NAME	CATEGORY	RETAIL
9589039485491	Calm Conditioner	HAIR CARE	\$55.50
9589039485434	Calm Shampoo	HAIR CARE	\$51.00

3. Change the quantity, if necessary, by directly typing the desired number into the field, and then **confirm it by pressing “Enter.”**

The highlight now moves to the Representative field:

Product Code	Price	Qty	Total Price	Representative
9589039485491	\$55.50	1	\$55.50	JULIE

BOOK	NAME	CATEGORY	RETAIL
9589039485491	Calm Conditioner	HAIR CARE	\$55.50
9589039485434	Calm Shampoo	HAIR CARE	\$51.00

SEARCH BY NAME... Locate by NAME - F8: calm by CATEGORY

4. Change the provider, if necessary, by selecting another one from the drop-down list, and then **confirm the chosen provider by pressing “Enter.”**

This will add the product to the appointment and take you back to the Next Action panel.

5. In the Next Action panel, select additional options as necessary and then save the appointment (“F12 | DONE! Save Appointment” option).

Booking Complex Appointments (Advanced Availability Searching)

Complex appointments have more than one service, combo, or package in them. Such appointments can be booked with the Advanced-Booking procedure only. You can however add additional services/combos/packages to the appointments that have been FastBooked, too. Complex appointments often require you to use the Advanced Availability Search feature because estimating the needed providers and resources beforehand might be difficult.

For details on how to Advanced-Book appointments, see “3. The Booking Procedure” chapter on page 5, Advanced Booking column.

For details on the Advanced Availability Search feature, refer to “Advanced Availability Searching” below.

Adding Additional Services/Combos/Packages to an Existing Appointment

1. Make sure the Next Action panel is displayed:

JAN MCCLEAN **PENDING** **Mon, Jan 11** **START TIME: 10:00 AM** **DURATION: 00:45** **AMOUNT: \$45.00**

Service Start Time: 10:00 AM
Service Duration: 00:15
Gap Duration: 00:15
Finish Duration: 00:15
Quantity: 1.00
Allowed Provider: Jan

Next Action

- F1 | toggle between schedule and booking views
- F2 | Add a Service
- F3 | Add a Service Gap
- F4 | Add a Package / Combo
- F5 | Add a Product
- F6 | Appointment Comment
- F7 | Setup Recurrence
- F8 | Advanced Availability Search
- F12 | DONE! Save Appointment

Recent Appts.

Showing the last 6 months of Appointments...

Day	Date	Time
Thursday	1/7/2010	2:30 PM
Thursday	1/7/2010	2:30 PM
Thursday	1/7/2010	1:15 PM
Saturday	1/2/2010	8:00 AM
Thursday	12/31/2009	8:00 AM
Thursday	12/29/2009	9:15 AM
Monday	12/28/2009	1:00 PM
Monday	12/28/2009	12:00 PM
Monday	12/28/2009	9:00 AM
Thursday	12/24/2009	10:00 AM
Monday	12/21/2009	8:00 AM
Monday	9/21/2009	11:00 AM

If adding services/combos/packages to an existing appointment, to display the Next Action panel, click and select the appointment in the Scheduler and then click the Edit button. This will open the selected appointment for editing.

2. Proceed with adding services/combos/packages as necessary by selecting the appropriate option in the Next Action panel.
3. When finished, in the Next Action panel, save the appointment (the “F12 | DONE! Save Appointment” option). If the appointment no longer fits into the existing opening (KORVUE will pop up a warning message if so), perform Advanced Availability Searching and reschedule the appointment (For details, see the Advanced Availability Searching” topic below).

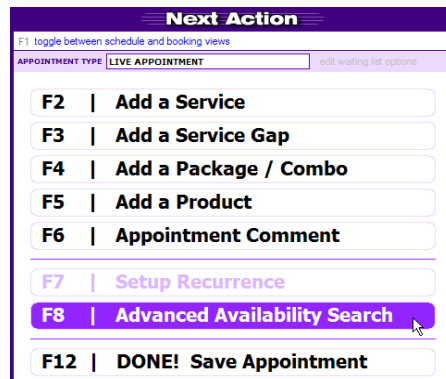
Advanced Availability Searching

The Advanced Availability Search feature enables you to make KORVUE find and suggest the available openings for the appointment you are booking with the Advanced-Booking procedure. The feature is also available when modifying an existing appointment that has been either Advanced-Booked or FastBooked. To perform an Advanced Availability Search:

1. **Make sure the Next Action panel is displayed** (See the picture above.).

If Advanced Booking an Appointment:	If Re-Scheduling an Existing Appointment:
Add all the services/packages/combo to the appointment first and then return to the Next Action panel.	To display the Next Action panel, click and select the appointment in the Scheduler and then click the Edit button. This will open the selected appointment for editing.

2. Either **press F8** or click the “F8 | Advanced Availability Search” option:



Note:

The “F8 | Advanced Availability Search” option is unavailable until there is at least one service/package/combo added to the appointment. Also, you need to have added all the services/packages/combo to the appointment before using the Advanced Availability Search, otherwise the search results would be meaningless.

This will display the Advanced Availability Search panel:

JAN MCCLEAN

PROGRAM: NONE CLIENT #: 45007

PENDING Mon, Jan 11 START TIME: 10:00 AM DURATION: 00:45 AMOUNT: \$45.00

10:00 AM MD-Micro-Dermabrasion (45 min)

Service Start Time: 10:00 AM
Service Duration: 00:15
Gap Duration: 00:15
Finish Duration: 00:15
Quantity: 1.00
Allowed Provider: Jan

SPA No Credit Card On-File

Advanced Availability Search

Find 10 openings for ASAP at ASAP

Micro-Dermabrasion

Provider	Jan	Alternate	(not used)
Assistant	(not used)	Alternate	(not used)
Resource	(not used)	Alternate	(not used)

begin your search

3. (Optional) Specify the target timing for the appointment and the number of the suggested openings.

In this step, you tell KORVUE what is the acceptable time period within which the appointment should be booked. For example, the client may want the appointment scheduled for a specific day or for the next weekend. You can also specify that you want the appointment to be booked in a particular time of the day, like the morning, afternoon, or evening. By default, (that is, if you don't change any of the KORVUE's timing settings), KORVUE will suggest the 10 most shortly upcoming available openings ("ASAP") which is good enough for most cases so it will be skipping this step most of the time.

Note:

The most shortly upcoming available openings are estimated as being "ASAP" relative from the present moment, not from the day in the Scheduler from which you have started the booking procedure.

3.1. (Optional) Change the number of the suggested openings.

If, for some reason, you want to change the default number of suggested openings (10) which KORVUE will return from the search:

3.1.1. Click and highlight the Find field at the top-left corner of the Advanced Availability Search panel:

Advanced Availability Search

Find 11 openings for ASAP at ASAP

Micro-Dermabrasion

Provider	Jan	Alternate	(not used)
Assistant	(not used)	Alternate	(not used)
Resource	(not used)	Alternate	(not used)

begin your search

3.1.2. Type in the number of openings you want.

Tip:

Another way to change the number in the field is to use the spin buttons at the right boarder of the field.

3.2. (Optional) Change the target timing for the appointment.

Click and open the "openings for" drop-down list and then select the timing option you want:

Tip:

If you need the search to be more precise, use the Specific Day(s) option. This option allows you to include only specific days of the week in the search as well as to define a time period (To display the end date of the period, click and check the TO: box):

3.3. (Optional) Specify the appropriate time of the day for the appointment.

Click and open the “at” drop-down list and then select the time option you want:

Tip:

If you need to specify exact hours for the appointment, use the Specific Time(s) option. This option allows you to set the starting time of the appointment either as a set hour or as an acceptable time period (To display the end time of the period, click and check the TO: box):

Advanced Availability Search

Find 11 openings for Specific Day(s) at Specific Time(s)

DAYS 1 ☒ ANY ☒ SUN ☒ MON ☒ TUE ☒ WED ☒ THU ☒ FRI ☒ SAT

DATE MON 1/11/2010 To

TIME 10:00 AM ending 10:45 AM To

begin your search

Provider Jan Alternate (not used)
 Assistant (not used) Alternate (not used)
 Resource (not used) Alternate (not used)

4. Start the search by either pressing F8 or by clicking the “begin your search” option on the right:

Advanced Availability Search

Find 11 openings for Specific Day(s) at Specific Time(s)

DAYS 1 ☒ ANY ☒ SUN ☒ MON ☒ TUE ☒ WED ☒ THU ☒ FRI ☒ SAT

DATE MON 1/11/2010 To

TIME 10:00 AM ending 10:45 AM To

begin your search

Micro-Dermabrasion

Provider Jan Alternate (not used)
 Assistant (not used) Alternate (not used)
 Resource (not used) Alternate (not used)

KORVUE will find the available openings and list them in the right-hand side of the Advanced Availability Search panel:

Advanced Availability Search

Find 11 openings for Specific Day(s) at Specific Time(s)

DAYS 1 ☒ ANY ☒ SUN ☒ MON ☒ TUE ☒ WED ☒ THU ☒ FRI ☒ SAT

DATE MON 1/11/2010 To

TIME 10:00 AM ending 10:45 AM To

Search Results

F1 preview selected result

Mon, Jan 11, 2010 from 10:00 AM to 10:45 AM
 Micro-Dermabrasion (45min)
 Jan

Mon, Jan 11, 2010 from 10:15 AM to 11:00 AM
 Micro-Dermabrasion (45min)
 Jan

Mon, Jan 11, 2010 from 10:30 AM to 11:15 AM
 Micro-Dermabrasion (45min)
 Jan

Mon, Jan 11, 2010 from 10:45 AM to 11:30 AM
 Micro-Dermabrasion (45min)
 Jan

Mon, Jan 11, 2010 from 11:00 AM to 11:45 AM
 Micro-Dermabrasion (45min)
 Jan

Mon, Jan 11, 2010 from 11:15 AM to 12:00 PM
 Micro-Dermabrasion (45min)
 Jan

5. In the Search Results list, find the most appropriate opening and then click and highlight it.
6. (Optional) Preview the selected appointment in the Scheduler.
 - 6.1. To display a preview of the appointment, press F1.
 - 6.2. To return to the Advanced Availability Search panel, press F1.
7. Confirm the selected appointment by pressing “Enter.”
 This will take you back to the Next Action panel.
8. Proceed as necessary by selecting the appropriate option in the Next Action panel. When finished, save the appointment (the “F12 | DONE! Save Appointment” option).

Entering Referral Information

Depending on your KORVUE system settings, at some point of the booking process you may be asked about the guest’s referral information, that is, how the guest was referred to your salon. This is important because referral information not only helps your

salon’s overall marketing and analytics, but also assist in tracking the providers’ “New Requests” and the results of their own self-promotion/word of mouth. KORVUE requests the referral information with the following prompt:

Select Referral

Robson, was the client referred for BROW WAX? It appears that this will be their first time receiving this type of service here.

☒ No

☐ Yes, by Client

☐ Yes, by Employee

☐ Yes, by Other

Accept and Return Cancel and Return

Respond to the prompt as follows and then proceed with the booking procedure:

If a RETURNING GUEST:

Select “No” and then click “Accept and Return”.

If a NEW GUEST:

1. Select the appropriate Yes-option:

- **If the guest has been referred by a client**, select “Yes, by Client”. No further information regarding the identity of the referrer is needed.
- **If the guest has been referred by an employee**, select “Yes, by Employee” and then select the particular provider / salon employee from the list.
- **If the guest was brought to the salon by any other reason** (promotion, GC, walked in), select “Yes, by Other”.

2. Click “Accept and Return”.