

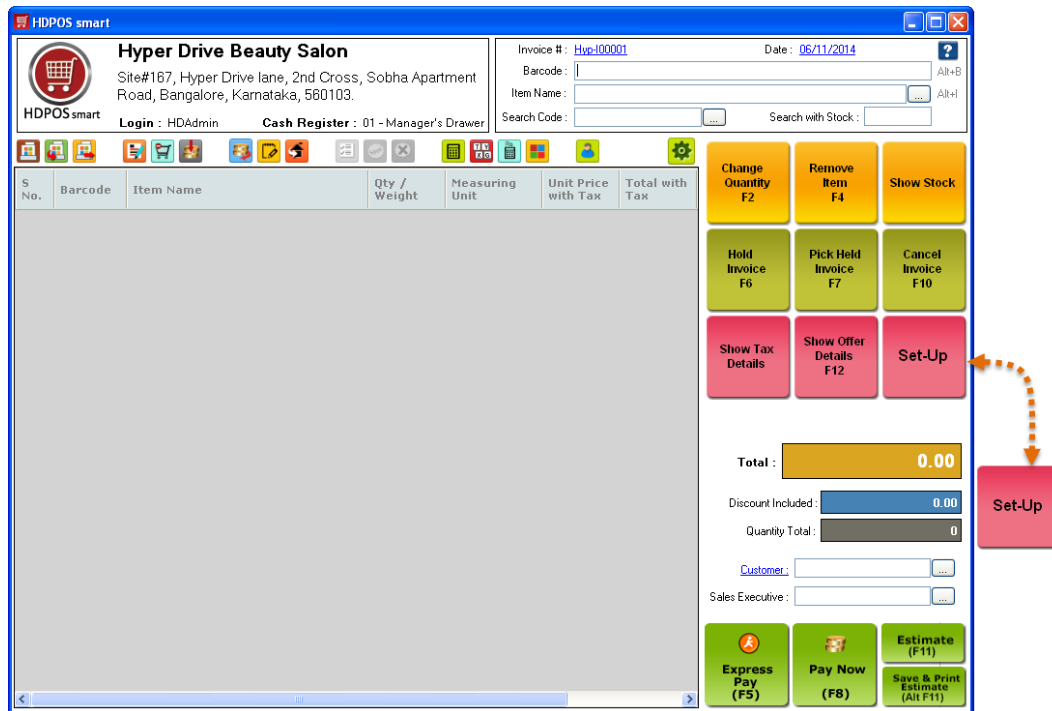
# How to add a repeating appointment in HDPOS



HDPOS smart Tutorials

To add a repeating appointment in HDPOS smart, follow the steps below.

1. Run **HDPOS smart**. Click on **Set-Up**.



2. From 4<sup>th</sup> page of Set-Up, click on **Appointment**.





3. From **Appointment Manager**, click on **Add Repeating Appointments** button.

Appointment Number	Appointment Title	Appointment Date	Duration	Customer	Customer Mobile Number	Employee
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Total Records : 2

**Note:** In HDPOS smart, the repeating appointments are limited to 400 dates.



4. In the **Appointment Details** screen that got opened, enter the required details.

**Appointment Details**

Select Business Location : Hyper Drive Beauty Salon

Appointment Title : Haircut Repeating Set Number : HKT11

Search Code : 445 Status : Scheduled

Employee : Vishal D Customer : Ganesh Swamy Supplier :

User Field List

He is a privileged customer. Pick Message

Item associated with appointment

Barcode : Item Name : Search Code :

S No.	Name	Barcode	Quantity
1	Men's Haircut	T00015	1.00

Generate Dates

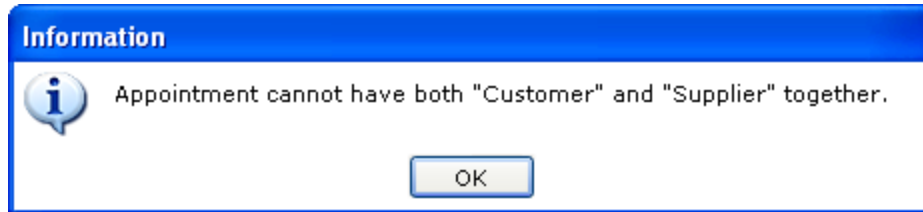
Start Date	End Date	Week Day	Month
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OK Cancel

- **Business Location:** Select the business location for which you want to make an appointment.
- **Appointment Title:** Enter a title for the Appointment if required.
- **Repeating Set Number:** Enter a number for this set of appointments. This number will be useful while editing or deleting an appointment.
- **Search Code:** Enter a code for the appointment. This will be the code through which you can search for the appointment.
- **Status:** Enter a status for the appointment. For example, you can define the values for status as Scheduled, Re scheduled and cancelled etc.,
- **Employee:** Enter the employee name that you want to assign to that appointment.
- **Customer:** Enter the customer name for the appointment.





- **Supplier:** Enter the supplier name for the appointment.  
**Note:** You can add an appointment either for a customer or a supplier. If you entered both customer and supplier name while adding a new appointment, the following error will be shown to you.



- **Notes:** You can enter any notes here. If you have any pre defined messages, you can select them from **Pick Message**.
- **User Field List:** If you have any user fields for appointment, they will be displayed here. To define user fields for appointment: Go to 4<sup>th</sup> page → Settings.



- Click on  button.
  - Click on **Add Appointment User Field**. Enter a **Field Name** and **Field Type** and click on **Create**.
  - If you intend to use the appointment field for checking the availability, please check the 'Consider for Availability Check' checkbox.
  - **Item Associated with Appointment:** Select the item names that are used to complete that appointment. You can search the item with **Barcode** or **Item Name** or **Search Code**. You can delete the items that are added here with .
- Note:** The items added here will appear in the sales invoice when you convert this appointment to sales invoice.



- **Generate Dates:** Clicking on this button will open **Dates Generator** screen as shown below that allow you to select all the dates for the appointment.

The screenshot shows the 'Dates Generator' application window. It features a blue title bar with a close button. The main content area is divided into two sections. The top section contains two date pickers: 'From: 09/01/2015' and 'To: 15/01/2015'. Below these is a 'Select Dates' section with three radio buttons: 'Daily' (selected), 'Weekly', and 'Monthly'. To the right of the radio buttons are input fields for 'From: 10:00 AM', 'Duration: 0 hrs 45 mins', and 'Repeat every: 1 days'. A 'Generate' button is located at the bottom right of the window.

- From:** Select the start date for the set of appointments.
  - To:** Select the end date for the set of appointments.
  - Select Dates:** Here you will be given 3 choices to select the dates.
    - Daily
    - Weekly
    - Monthly
- **Daily:** Select the **Daily** radio button; enter the details to repeat the appointment for specific number of days.
    - **From:** Enter the starting date of appointment.
    - **To:** Enter the ending date of appointment.
    - **From:** Enter the start time of the appointment.
    - **Repeat Every:** Enter the number of days for which you want the appointment to be repeated.
    - **Duration: Enter the duration of the appointments.**
    - Click on **Generate** button.
    - For example I entered details as shown below.



**Dates Generator**

From: 09/01/2015 To: 15/01/2015

Select Dates

From: 10:00 AM Duration: 1 hrs 0 mins

Repeat every: 2 days

Daily  
 Weekly  
 Monthly

Generate



You can see the Appointment details screen as shown below with generated dates for the set of appointments.

**Appointment Details**

Select Business Location : Hyper Drive Beauty Salon

Appointment Title : Beard Trimming Repeating Set Number : 45

Search Code : 45 Status : Scheduled

Employee : Vishal D Customer : Shankar Supplier :

User Field List

Beard trimming every alternate days. Pick Message

Item associated with appointment

Barcode : Item Name : Search Code :

S No.	Name	Barcode	Quantity
1	Beard trimming	T00016	1.00

4 dates generated Generate Dates

Start Date	End Date	Week Day	Month
09/01/2015 10:00 AM	09/01/2015 11:00 AM	Friday	January
11/01/2015 10:00 AM	11/01/2015 11:00 AM	Sunday	January
13/01/2015 10:00 AM	13/01/2015 11:00 AM	Tuesday	January
15/01/2015 10:00 AM	15/01/2015 11:00 AM	Thursday	January

DK Cancel

- **Weekly:** Select the **Weekly** radio button; enter the details to repeat the appointment for specific number of weeks and on specific days of each week.
  - **From:** Enter the starting date of appointment.
  - **To:** Enter the ending date of appointment.
  - **From:** Enter the start time of the appointments.
  - **Duration:** Enter the duration of the appointments.
  - **Repeat Every:** Enter the number of weeks for which you want the appointment to be repeated.
  - **Checkboxes for each day:** Check the checkboxes of days of a week on which you want the appointment to be repeated.
  - Click on **Generate** Button.



**Dates Generator** [Close]

From: 09/01/2015 To: 24/02/2015

Select Dates

From: 11:00 AM Duration: 1 hrs 0 mins

Repeat every: 1 weeks

Daily  
 Weekly  
 Monthly

Sunday  Monday  Tuesday  Wednesday  
 Thursday  Friday  Saturday

Generate

You can see the Appointment details screen as shown below with generated dates for set of appointment.





**Appointment Details**

Select Business Location : Hyper Drive Beauty Salon

Appointment Title : Haircut Repeating Set Number : 7875

Search Code : 12 Status : Scheduled

Employee : Ankita Jain Customer : Serena Supplier :

User Field List

The customer has opted for a Hair therapy that requires the customer to visit us every week. Pick Message

Item associated with appointment

Barcode : Item Name : Search Code :

S No.	Name	Barcode	Quantity
1	Hair therapy	T00017	1.00

**7 dates generated** Generate Dates

Start Date	End Date	Week Day	Month
11/01/2015 11:00 AM	11/01/2015 12:00 PM	Sunday	January
18/01/2015 11:00 AM	18/01/2015 12:00 PM	Sunday	January
25/01/2015 11:00 AM	25/01/2015 12:00 PM	Sunday	January
01/02/2015 11:00 AM	01/02/2015 12:00 PM	Sunday	February
08/02/2015 11:00 AM	08/02/2015 12:00 PM	Sunday	February
15/02/2015 11:00 AM	15/02/2015 12:00 PM	Sunday	February

OK Cancel

- **Monthly:** Select the **Monthly** radio button; enter the details to repeat the appointment for specific number of weeks and on specific days of each week.
  - **From:** Enter the starting date of appointment.
  - **To:** Enter the ending date of appointment.
  - **From:** Enter the start time of the appointments.
  - **Duration:** Enter the duration of the appointments.
  - Select the months for which you want the appointment to be repeated by checking the respective checkboxes. If you want to select all months check the checkbox **Select All**.
  - You can either select Dates of a month or Week Days to repeat the appointment.



- **On Dates:** Select the dates of a month by checking the checkboxes of dates. If you are not sure of the last date of a month, then you can check the **Last** checkbox.

For example, if you select the dates as shown below, the appointment will be repeated on 9<sup>th</sup> and 28<sup>th</sup> of each of the selected month(s).

On Date(s)

<input type="checkbox"/> 1	<input type="checkbox"/> 8	<input type="checkbox"/> 15	<input type="checkbox"/> 22	<input type="checkbox"/> 29
<input type="checkbox"/> 2	<input checked="" type="checkbox"/> 9	<input type="checkbox"/> 16	<input type="checkbox"/> 23	<input type="checkbox"/> 30
<input type="checkbox"/> 3	<input type="checkbox"/> 10	<input type="checkbox"/> 17	<input type="checkbox"/> 24	<input type="checkbox"/> 31
<input type="checkbox"/> 4	<input type="checkbox"/> 11	<input type="checkbox"/> 18	<input type="checkbox"/> 25	<input type="checkbox"/> Last
<input type="checkbox"/> 5	<input type="checkbox"/> 12	<input type="checkbox"/> 19	<input type="checkbox"/> 26	
<input type="checkbox"/> 6	<input type="checkbox"/> 13	<input type="checkbox"/> 20	<input type="checkbox"/> 27	
<input type="checkbox"/> 7	<input type="checkbox"/> 14	<input type="checkbox"/> 21	<input checked="" type="checkbox"/> 28	

- **On Week Days:** Select the weeks . If you are not sure of the last week of a month, you can check **Last** checkbox. You can also select the days of a week by checking the respective checkboxes. You can select all weeks and all dates by **Select All** and **Select All Dates** checkboxes.

For Example, if you select as shown below, then the appointment will be repeated on Wednesday and Friday of every second week in the selected month(s).

On Week Days

<input type="checkbox"/> First	<input type="checkbox"/> Sunday
<input checked="" type="checkbox"/> Second	<input type="checkbox"/> Monday
<input type="checkbox"/> Third	<input type="checkbox"/> Tuesday
<input type="checkbox"/> Fourth	<input checked="" type="checkbox"/> Wednesday
<input type="checkbox"/> Fifth	<input type="checkbox"/> Thursday
<input type="checkbox"/> Last	<input checked="" type="checkbox"/> Friday
<input type="checkbox"/> Select All	<input type="checkbox"/> Saturday
	<input type="checkbox"/> Select All days



**Dates Generator** [Close]

From: 01/01/2015 To: 10/03/2015

Select Dates

From: 11:00 AM Duration: 1 hrs 0 mins

On Date(s)

<input type="checkbox"/> 1	<input type="checkbox"/> 8	<input type="checkbox"/> 15	<input type="checkbox"/> 22	<input type="checkbox"/> 29
<input type="checkbox"/> 2	<input type="checkbox"/> 9	<input type="checkbox"/> 16	<input type="checkbox"/> 23	<input type="checkbox"/> 30
<input type="checkbox"/> 3	<input type="checkbox"/> 10	<input type="checkbox"/> 17	<input type="checkbox"/> 24	<input type="checkbox"/> 31
<input type="checkbox"/> 4	<input type="checkbox"/> 11	<input type="checkbox"/> 18	<input type="checkbox"/> 25	<input type="checkbox"/> Last
<input type="checkbox"/> 5	<input type="checkbox"/> 12	<input type="checkbox"/> 19	<input type="checkbox"/> 26	
<input type="checkbox"/> 6	<input type="checkbox"/> 13	<input type="checkbox"/> 20	<input type="checkbox"/> 27	
<input type="checkbox"/> 7	<input type="checkbox"/> 14	<input type="checkbox"/> 21	<input type="checkbox"/> 28	

On Week Days

<input checked="" type="checkbox"/> First	<input checked="" type="checkbox"/> Sunday
<input type="checkbox"/> Second	<input type="checkbox"/> Monday
<input checked="" type="checkbox"/> Third	<input type="checkbox"/> Tuesday
<input type="checkbox"/> Fourth	<input type="checkbox"/> Wednesday
<input type="checkbox"/> Fifth	<input type="checkbox"/> Thursday
<input type="checkbox"/> Last	<input type="checkbox"/> Friday
	<input type="checkbox"/> Saturday

Select All  Select All days

Daily  
 Weekly  
 Monthly

January  
 February  
 March  
 April  
 May  
 June  
 July  
 August  
 September  
 October  
 November  
 December

Select All

**Generate**





You can see the Appointment details screen as shown below with generated dates for set of appointment.

**Appointment Details**

Select Business Location :

Appointment Title :  Repeating Set Number :

Search Code :  Status :

Employee :  Customer :  Supplier :

User Field List

The customer has opted for a Hair therapy that requires the customer to visit us on the dates mentioned. Pick Message

Item associated with appointment

Barcode :  Item Name :  Search Code :

S No.	Name	Barcode	Quantity
1	Hair therapy	T00017	1.00

**5 dates generated** Generate Dates

Start Date	End Date	Week Day	Month
04/01/2015 11:00 AM	04/01/2015 12:00 PM	Sunday	January
18/01/2015 11:00 AM	18/01/2015 12:00 PM	Sunday	January
01/02/2015 11:00 AM	01/02/2015 12:00 PM	Sunday	February
15/02/2015 11:00 AM	15/02/2015 12:00 PM	Sunday	February
01/03/2015 11:00 AM	01/03/2015 12:00 PM	Sunday	March

OK Cancel

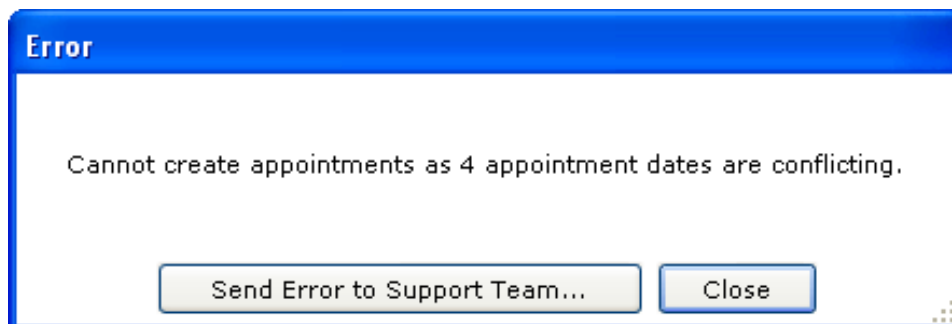


5. Click on **OK** to create the appointments and see the added appointment as shown below.

The screenshot shows the 'Appointment Manager' window. It features a sidebar with various icons for settings, delivery, make plan, customer receipt, close database, scheduler, tax structure, and C.R session. The main area contains a table of appointments with columns for Appointment Number, Appointment Title, Appointment Date, Duration, Customer Code, Customer, and Customer Mobile Number. The table lists 14 appointments, including services like Beard Trimming, French Pedicure, Manicure and Pedicure, and Haircut, scheduled between 09/01/2015 and 01/03/2015. At the bottom, there are buttons for 'Backup Database', 'Restore Database', 'Go Back To Main Screen', 'About Us', and 'Feedback'.

Appointment Number	Appointment Title	Appointment Date	Duration	Customer Code	Customer	Customer Mobile Num
HDI-AP00006	Beard Trimming	09/01/2015 10:00 AM	1 hr, 0 mins	C00008	Shankar	
HDI-AP00004	French Pedicure	09/01/2015 10:30 AM	1 hr, 30 mins	C00005	Serena	1124563930
HDI-AP00005	Manicure and Pedicure	09/01/2015 10:30 AM	1 hr, 30 mins	C00005	Serena	1124563930
HDI-AP00007	Beard Trimming	11/01/2015 10:00 AM	1 hr, 0 mins	C00008	Shankar	
HDI-AP00008	Beard Trimming	13/01/2015 10:00 AM	1 hr, 0 mins	C00008	Shankar	
HDI-AP00009	Beard Trimming	15/01/2015 10:00 AM	1 hr, 0 mins	C00008	Shankar	
HDI-AP00011	Haircut	18/01/2015 11:00 AM	1 hr, 0 mins	C00005	Serena	1124563930
HDI-AP00012	Haircut	01/02/2015 11:00 AM	1 hr, 0 mins	C00005	Serena	1124563930
HDI-AP00013	Haircut	15/02/2015 11:00 AM	1 hr, 0 mins	C00005	Serena	1124563930
HDI-AP00014	Haircut	01/03/2015 11:00 AM	1 hr, 0 mins	C00005	Serena	1124563930

6. If there are any conflicting appointments for the appointments that are being created, then, the application presents you with the below shown error message.





7. Click on **Close**. The Appointment manager window with conflicting appointments is as shown below.

**Appointment Details**

Select Business Location : Hyper Drive Beauty Salon

Appointment Title : Repeating Set Number : 44

Search Code : 44 Status : Scheduled

Employee : Vishal D Customer : Sushmit Sen Supplier :

User Field List

Everyday trimming of beard Pick Message

Item associated with appointment

Barcode : Item Name : Search Code :

S No.	Name	Barcode	Quantity
1	Foam Shave	T00018	1.00

7 dates generated Generate Dates

Start Date	End Date	Week Day	Month	Show Conflicts
09/01/2015 10:00 AM	09/01/2015 10:20 AM	Friday	January	Show Conflicts
10/01/2015 10:00 AM	10/01/2015 10:20 AM	Saturday	January	Show Conflicts
11/01/2015 10:00 AM	11/01/2015 10:20 AM	Sunday	January	Show Conflicts
12/01/2015 10:00 AM	12/01/2015 10:20 AM	Monday	January	Show Conflicts
13/01/2015 10:00 AM	13/01/2015 10:20 AM	Tuesday	January	Show Conflicts
14/01/2015 10:00 AM	14/01/2015 10:20 AM	Wednesday	January	Show Conflicts

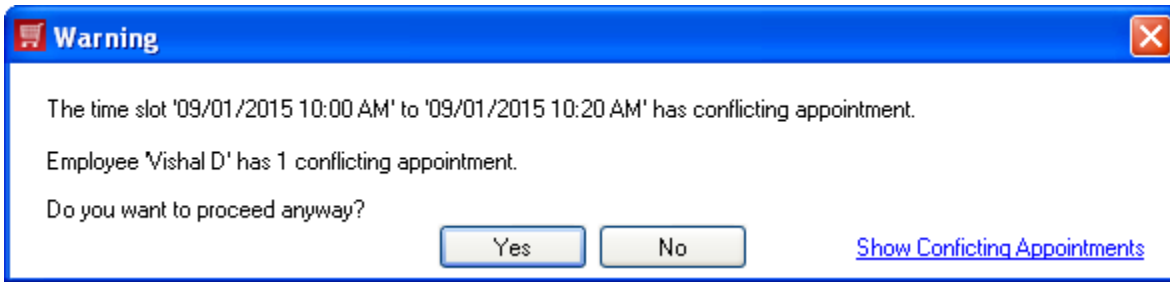
OK Cancel

8. Click on **Show Conflicts** link to see the conflicting appointments for each of the dates generated.

Start Date	End Date	Week Day	Month	Show Conflicts
09/01/2015 10:00 AM	09/01/2015 10:20 AM	Friday	January	Show Conflicts
10/01/2015 10:00 AM	10/01/2015 10:20 AM	Saturday	January	Show Conflicts
11/01/2015 10:00 AM	11/01/2015 10:20 AM	Sunday	January	Show Conflicts
12/01/2015 10:00 AM	12/01/2015 10:20 AM	Monday	January	Show Conflicts
13/01/2015 10:00 AM	13/01/2015 10:20 AM	Tuesday	January	Show Conflicts
14/01/2015 10:00 AM	14/01/2015 10:20 AM	Wednesday	January	Show Conflicts



9. A warning message is shown informing the customer about the conflicting appointments.

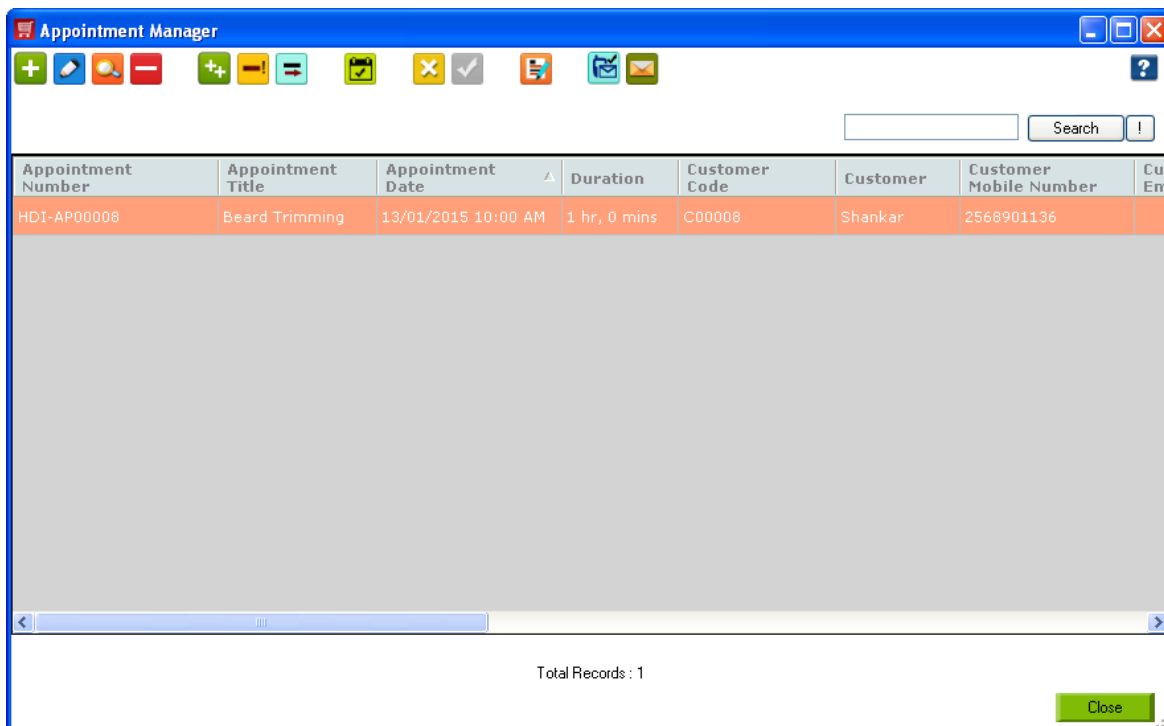


10. If you want to proceed anyway, click on **Yes**. This will mark the conflict as **Ignored**. Otherwise, click on **Show Conflicting Appointments** link.

Note: You can click on 'Ignored' link again to get the 'Show conflicts' link. You will be able to create the appointments only after all the conflicts are either resolved or ignored.

Start Date	End Date	Week Day	Month	Show Conflicts
09/01/2015 10:00 AM	09/01/2015 10:20 AM	Friday	January	<a href="#">Ignored</a>
10/01/2015 10:00 AM	10/01/2015 10:20 AM	Saturday	January	
11/01/2015 10:00 AM	11/01/2015 10:20 AM	Sunday	January	<a href="#">Ignored</a>
12/01/2015 10:00 AM	12/01/2015 10:20 AM	Monday	January	
13/01/2015 10:00 AM	13/01/2015 10:20 AM	Tuesday	January	<a href="#">Show Conflicts</a>
14/01/2015 10:00 AM	14/01/2015 10:20 AM	Wednesday	January	

11. If you have clicked on the **Show Conflicting appointments** link, you can view, edit or delete the conflicting appointments as necessary.





12. Click on **Close**.

13. Once all the conflicts are either ignored or resolved, click on **OK** to create the appointments.

**Appointment Details**

Select Business Location : Hyper Drive Beauty Salon

Appointment Title : Repeating Set Number : 44

Search Code : 44 Status : Scheduled

Employee : Vishal D Customer : Sushmit Sen Supplier :

User Field List

Everyday trimming of beard Pick Message

Item associated with appointment

Barcode : Item Name : Search Code :

S No.	Name	Barcode	Quantity
1	Foam Shave	T00018	1.00

7 dates generated Generate Dates

Start Date	End Date	Week Day	Month	Show Conflicts
09/01/2015 10:00 AM	09/01/2015 10:20 AM	Friday	January	Ignored
10/01/2015 10:00 AM	10/01/2015 10:20 AM	Saturday	January	
11/01/2015 10:00 AM	11/01/2015 10:20 AM	Sunday	January	Ignored
12/01/2015 10:00 AM	12/01/2015 10:20 AM	Monday	January	
13/01/2015 10:00 AM	13/01/2015 10:20 AM	Tuesday	January	Ignored
14/01/2015 10:00 AM	14/01/2015 10:20 AM	Wednesday	January	

OK Cancel